Checkout last quarters major news online...

- **OFCOM CLARIFIES RIGHTS OF CONSUMERS WITH RESPECT TO MID-CONTRACT PRICE RISES**
- **BT GROUP ANNOUNCES FURTHER £50M OF COMMERCIAL INVESTMENT FOR BROADBAND IN CITIES**
- **COUNTIES SUCH AS SUFFOLK START PLANNING FOR 95% SUPERFAST COVERAGE TARGET**
- **GIGABIT PROVIDER HYPEROPTIC ANNOUNCES EXPANSION TO READING, BRISTOL AND CARDIFF**
- **BT, SKY AND TALKTALK ALL NOW OFFER NETWORK LEVEL PARENTAL CONTROLS**
- **SELF-INSTALL FOR FTTC BROADBAND TO MAKE IT EASIER TO GET IT INSTALLED**

Inside...

Projection of UK broadband speeds in Summer 2015

- **Broadband market share**
- **Total fixed broadband connections**
- **Broadband connections what are they good for?**
- **Rural areas versus Semi Urban versus Urban**
- **Regional broadband speeds**
- **UK broadband speeds by postcodes**
- **Broadband timeline**
- **About thinkbroadband.com**
Projection of UK broadband speeds in summer 2015

Source: thinkbroadband analysis of technological capabilities and local loop lengths
Revised: Summer 2013

Technology mix across UK
5% have option of FTTP via Openreach
2.5% have option of FTTP/B via Altinet
90% have option of FTTC via Openreach
50% have option of FTTN via Virgin Media
100% access to ADSL2+ or USC Alternative
Many elect to remain on ADSL type services due to price/contracts

Once coverage and popularity of 4g is clear it will be added to the projection.

23 Million
Fixed broadband lines

Peak speed
30 Mbps
Off peak speed
36 Mbps

Figure of 23 million fixed broadband lines allows for growth of 2.7 million lines in next three years

13.7 Million
ADSL2+ and USC services*
(Universal Service Commitment)

4.5 Million
Virgin Media

4.1 Million
Openreach FTTC

0.2 Million
Openreach FTTP

0.2 Million
Altinet FTTP/B

Estimates revised down from a peak time speed of 37 Mbps (off peak 46 Mbps) to reflect decrease in FTTP roll-out activity and focus on consumers for lower priced packages

Speed increasing
**Broadband market share**
Source: Providers’ Quarterly Results to December 2013

- **BT**: 31.8% Includes ~700k Plusnet subscribers
- **TalkTalk**: 18.9%
- **Virgin Media**: 20.2%
- **Sky**: 23%
- **EE**: 3.3%
- **Others**: 2.8%

**Broadband subscriber numbers (millions)**
Source: Financial results for included companies

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>BT</td>
<td>6.00</td>
<td>6.10</td>
<td>6.28</td>
<td>6.36</td>
<td>6.44</td>
<td>6.56</td>
<td>6.69</td>
<td>6.78</td>
<td>6.94</td>
<td>7.09</td>
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<tr>
<td>Sky</td>
<td>3.49</td>
<td>3.84</td>
<td>3.86</td>
<td>4.00</td>
<td>4.10</td>
<td>4.20</td>
<td>4.39</td>
<td>4.91</td>
<td>5.02</td>
<td>5.13</td>
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<tr>
<td>Virgin Media</td>
<td>4.33</td>
<td>4.36</td>
<td>4.38</td>
<td>4.38</td>
<td>4.41</td>
<td>4.47</td>
<td>4.49</td>
<td>4.47</td>
<td>4.49</td>
<td>4.51</td>
</tr>
<tr>
<td>TalkTalk</td>
<td>4.13</td>
<td>4.08</td>
<td>4.07</td>
<td>4.05</td>
<td>4.04</td>
<td>4.05</td>
<td>4.06</td>
<td>4.07</td>
<td>4.08</td>
<td>4.19</td>
</tr>
<tr>
<td>EE/Orange</td>
<td>0.71</td>
<td>0.71</td>
<td>0.71</td>
<td>0.71</td>
<td>0.72</td>
<td>0.70</td>
<td>0.69</td>
<td>0.70</td>
<td>0.71</td>
<td>0.73</td>
</tr>
</tbody>
</table>
Total fixed broadband connections
2011-2014, Source: Point Topic, Ofcom, Providers

Q4, 2011: 20.7 Million
Q3, 2012: 21.3 Million
Q1, 2013: 21.7 Million
Q1, 2014: 22.3 Million

Average broadband speed
(UK measured)

Q4, 2011: 7.6 Mbps
Q2, 2012: 9.1 Mbps
Q2, 2013: 14.7 Mbps

Broadband speeds
2013, Source: Ofcom

~57% BT Openreach
~32% Virgin Media
~48%

73% Total UK households with access to superfast broadband
## Broadband connections: what are they good for?

**Source:** thinkbroadband.com

<table>
<thead>
<tr>
<th>Activity</th>
<th>1 hour use consumes (GB - Gigabytes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice over Internet Protocol</td>
<td>0.02 GB</td>
</tr>
<tr>
<td>Online Gaming</td>
<td>0.06 GB</td>
</tr>
<tr>
<td>Online radio</td>
<td>0.08 GB</td>
</tr>
<tr>
<td>Cloud based music services</td>
<td>0.2 GB</td>
</tr>
<tr>
<td>Basic web browsing</td>
<td>0.2 GB</td>
</tr>
<tr>
<td>YouTube basic LQ</td>
<td>0.2 GB</td>
</tr>
<tr>
<td>Webcam</td>
<td>0.4 GB</td>
</tr>
<tr>
<td>YouTube SD</td>
<td>0.4 GB</td>
</tr>
<tr>
<td>Interactive websites</td>
<td>1 GB</td>
</tr>
<tr>
<td>TV Catch-up SD</td>
<td>1 GB</td>
</tr>
<tr>
<td>NetFlix/LoveFilm SD</td>
<td>1 GB</td>
</tr>
<tr>
<td>YouTube HD</td>
<td>3 GB</td>
</tr>
<tr>
<td>TV Catch-up HD</td>
<td>3 GB</td>
</tr>
<tr>
<td>NetFlix/LoveFilm HD</td>
<td>3 GB</td>
</tr>
<tr>
<td>Cloud Gaming</td>
<td>4 GB</td>
</tr>
<tr>
<td>Business Quality Web Conferencing</td>
<td>5 GB</td>
</tr>
</tbody>
</table>

### In 90 minutes how much of a film will have downloaded...

(HD movie purchase using iTunes, XBox 360 or PS3 stores)

<table>
<thead>
<tr>
<th>Speed (Mbps)</th>
<th>0.5 Mbps</th>
<th>2 Mbps</th>
<th>7 Mbps</th>
<th>10 Mbps</th>
<th>20 Mbps</th>
<th>40 Mbps</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4%</td>
<td>16%</td>
<td>60%</td>
<td>100%</td>
<td>200%</td>
<td>400%</td>
</tr>
</tbody>
</table>
UK Population
Source: Ofcom

- Rural area: 14%
- Semi urban: 51%
- Urban: 35%

Standard & Superfast Broadband Availability
Source: Ofcom 2013

- Rural area
  - Standard: 80.1%
  - Superfast: 21.2%
- Semi urban
  - Standard: 96.9%
  - Superfast: 67%
- Urban
  - Standard: 98.3%
  - Superfast: 86%

Average speed of connections...
July 2013
Source: Ofcom

- Rural area: 5 Mbps
  - Average speed: 9.9 Mbps
- Semi urban: 5 Mbps
  - Average speed: 17.9 Mbps
- Urban: 5 Mbps
  - Average speed: 26.4 Mbps
Regional UK Broadband speeds
Source: thinkbroadband.com speed test results January 2014

- Average download rate Mbps
- Average upload rate Mbps

Scotland
- Download: 8.1 Mbps
- Upload: 0.8 Mbps

Northern Ireland
- Download: 13.9 Mbps
- Upload: 1.6 Mbps

North East
- Download: 13.3 Mbps
- Upload: 1.1 Mbps

North West
- Download: 12.2 Mbps
- Upload: 1.0 Mbps

Yorkshire & Humber
- Download: 10.6 Mbps
- Upload: 0.9 Mbps

East Midlands
- Download: 11.5 Mbps
- Upload: 1.0 Mbps

Wales
- Download: 6.6 Mbps
- Upload: 0.8 Mbps

West Midlands
- Download: 11.9 Mbps
- Upload: 1.1 Mbps

East
- Download: 8.8 Mbps
- Upload: 0.9 Mbps

London
- Download: 14.3 Mbps
- Upload: 1.4 Mbps

South West
- Download: 8.9 Mbps
- Upload: 0.9 Mbps

South East
- Download: 12.5 Mbps
- Upload: 1.0 Mbps

Lowest speeds

Highest speeds
**UH Broadband speeds by postcode**

Source: thinkbroadband.com speed test results January 2014

- **Average download rate Mbps**
- **Average upload rate Mbps**

### 10 slowest postcode areas

1. Inverness (IV) ▼ 5.4 ▲ 0.5
2. Galashiels (TD) ▼ 5.4 ▲ 0.5
3. Lerwick (ZE) ▼ 5.3 ▲ 0.4
4. Kirkwall (KW) ▼ 5.3 ▲ 0.4
5. Shrewsbury (SY) ▼ 5.1 ▲ 0.5
6. Perth (PH) ▼ 5.0 ▲ 0.4
7. Hereford (HR) ▼ 4.8 ▲ 0.6
8. Dumfries (DG) ▼ 4.6 ▲ 0.4
9. Llandrindod Wells (LD) ▼ 4.0 ▲ 0.4
10. Outer Hebrides (HS) ▼ 3.2 ▲ 0.4

### 10 fastest postcode area

1. Cleveland (TS) ▼ 19.0 ▲ 1.8
2. Romford (RM) ▼ 18.0 ▲ 1.9
3. Enfield (EN) ▼ 17.4 ▲ 1.9
4. Bromley (BR) ▼ 17.2 ▲ 1.6
5. Manchester (M) ▼ 17.0 ▲ 1.9
6. Uxbridge (UB) ▼ 16.7 ▲ 1.9
7. Luton (LU) ▼ 16.5 ▲ 1.8
8. Bolton (BL) ▼ 16.2 ▲ 1.3
9. Kingston Upon Thames (KT) ▼ 16.1 ▲ 1.6
10. North London (N) ▼ 16.1 ▲ 1.7
<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUG 2000</td>
<td>Consumer 0.5 Mbps ADSL services launched. Freeserve launches at £150 /setup + £39.99/month. Read more</td>
</tr>
<tr>
<td>FEB 2002</td>
<td>Pipex launches first sub-£30 (incl. VAT) ADSL service. Industry follows later in month with wholesale price reductions. Read more</td>
</tr>
<tr>
<td>NOV 2004</td>
<td>BT Wholesale starts consumer IPStream Home 2000 (self-install 2 Mbps) trial. Read more</td>
</tr>
<tr>
<td>APRIL 2005</td>
<td>BT Group announces five million ADSL users. Read more</td>
</tr>
<tr>
<td>SEPT 2005</td>
<td>Be launch first ADSL2+ network in the UK, £24 for up to 24 Mbps. Read more</td>
</tr>
<tr>
<td>MAR 2006</td>
<td>BT Wholesale launches its up to 8 Mbps Max and Max Premium (rate-adaptive ADSL) products. Read more</td>
</tr>
<tr>
<td>APRIL 2006</td>
<td>TalkTalk launches telephone and ‘free’ broadband for a combined total of £21.99/month. Read more</td>
</tr>
<tr>
<td>DEC 2008</td>
<td>Virgin Media launches 50 Mbps broadband service. Read more</td>
</tr>
<tr>
<td>JUN 2009</td>
<td>Final Digital Britain Report published by Lord Carter calling for 2 Mbps Universal Service commitment by 2012. Read more</td>
</tr>
<tr>
<td>MAY 2010</td>
<td>BT announces ‘two thirds’ of UK will get FTTC/FTTP fibre by 2015. Read more</td>
</tr>
<tr>
<td>OCT 2010</td>
<td>Virgin Media announces 100 Mbps service. Read more</td>
</tr>
<tr>
<td>OCT 2010</td>
<td>UK government announces its aim to have the “best broadband in Europe by 2015”. Read more</td>
</tr>
<tr>
<td>APRIL 2011</td>
<td>Broadband users in the UK reaches 19.5 million. Read more</td>
</tr>
<tr>
<td>FEB 2012</td>
<td>Openreach announces FTTP on Demand for areas with FTTC to roll out in 2013. Read more</td>
</tr>
<tr>
<td>SEPT 2012</td>
<td>Cumbria signs BDUK contract with BT, 93% to have super fast broadband by end of 2015. Read more</td>
</tr>
<tr>
<td>DEC 2012</td>
<td>First BDUK funded cabinet installed in North Yorkshire. Read more</td>
</tr>
<tr>
<td>JAN 2013</td>
<td>B4RN FTTH network goes live in Arkholme Lancashire, the projects second village. Read more</td>
</tr>
<tr>
<td>AUG 2013</td>
<td>100,000 premises passed by Broadband Delivery UK (BDUK) projects. Eventual goal is 4.5 million premises. Read more</td>
</tr>
<tr>
<td>SEPT 2013</td>
<td>Hyperoptic full fibre service available to 20,000 premises in London. Read more</td>
</tr>
<tr>
<td>JAN 2014</td>
<td>DCMS reports 273,731 premises now have superfast broadband available due to BDUK projects. Read more</td>
</tr>
</tbody>
</table>
About thinkbroadband.com

thinkbroadband.com is an independent broadband information website (originally known as ADSLguide.org.uk) started by a group of keen early adopters seeking to share their experience on how to make the most of their broadband services.

The website pioneered broadband speed testing and continues to provide a number of innovative tools to help users including a broadband quality monitor and a broadband usage meter to help users track how much they use their broadband connection. It provides easy-to-understand guides on all aspects of broadband in the home.

The site also provides daily news and commentary on all aspects of broadband in the UK and has a flourishing community of users willing to help each other on a range of technical issues.

SUBSCRIBING TO UPDATES

This factsheet will be updated quarterly and published on the thinkbroadband website. Advance copies can be provided to press on request - please contact team@thinkbroadband.com to request.

CONTACT DETAILS:

Web: www.thinkbroadband.com
E-mail: team@thinkbroadband.com

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