

UK BROADBAND FACTSHEET

Q2 2013

Checkout last quarters major news online...

- ▶ **EU DATA SHOWS 70.3% OF UK HOUSEHOLDS CAN ACCESS SUPERFAST BROADBAND**
- ▶ **HYPEROPTIC ANNOUNCE EXPANSION OF GIGABIT SERVICE TO 10 OTHER CITIES**
- ▶ **SUPERFAST BROADBAND FROM OPENREACH SALES PASS 1.5 MILLION MARK**
- ▶ **O2 HOME BROADBAND CLOSES DOORS TO NEW ORDERS AS PART OF BSKYB ACQUISITION**
- ▶ **VIRGIN MEDIA HAS 2.5MILLION CUSTOMERS ON A 30 MBPS OR FASTER SERVICE**
- ▶ **GIGACLEAR FTTP PROVIDER NETWORK GOES LIVE IN UPPINGHAM, RUTLAND**

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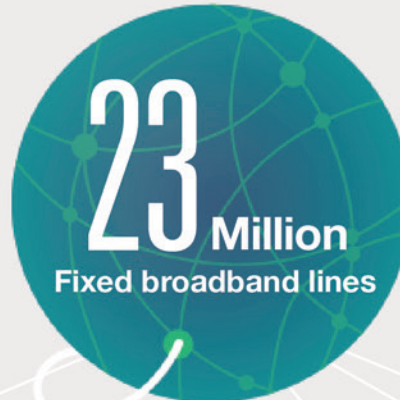
Projection of UK broadband speeds in summer 2015

Source: thinkbroadband analysis of technological capabilities and local loop lengths

Technology mix across UK

10% have option of FTTP via Openreach
 10% have option of FTTP/B via Altnet
 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.



Peak speed

37
Mbps

Off peak speed

45
Mbps

1Gbps 20%

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*

4.5 Million
Virgin Media

4.1 Million
Openreach
FTTC

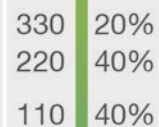
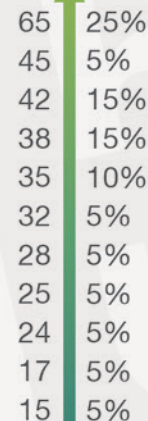
0.4M
Openreach
FTTP

0.2M
Altnet
FTTP/B

Speed increasing

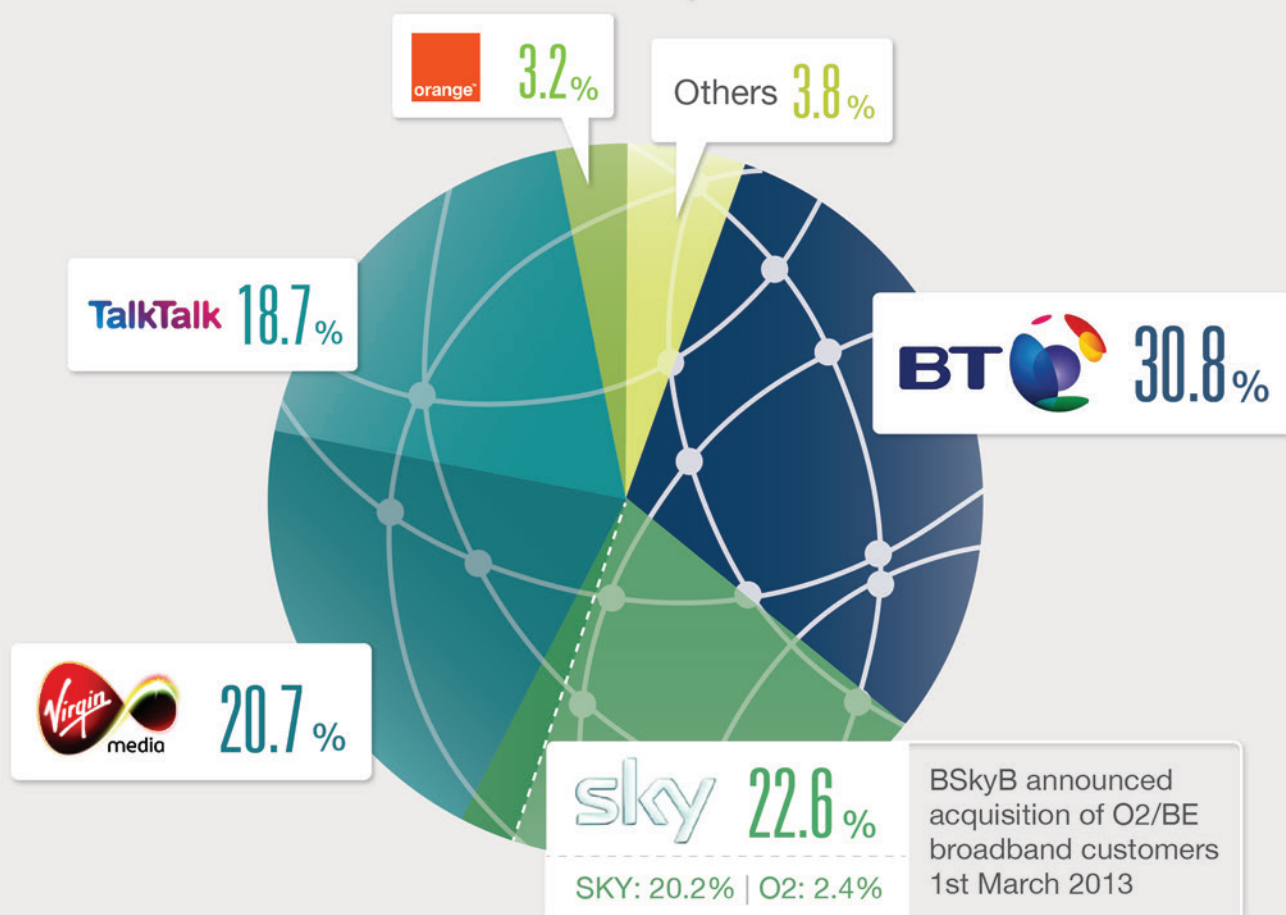


Speed split
for this
technology
type



Broadband market share

Source: Providers' Quarterly Results to March 2013



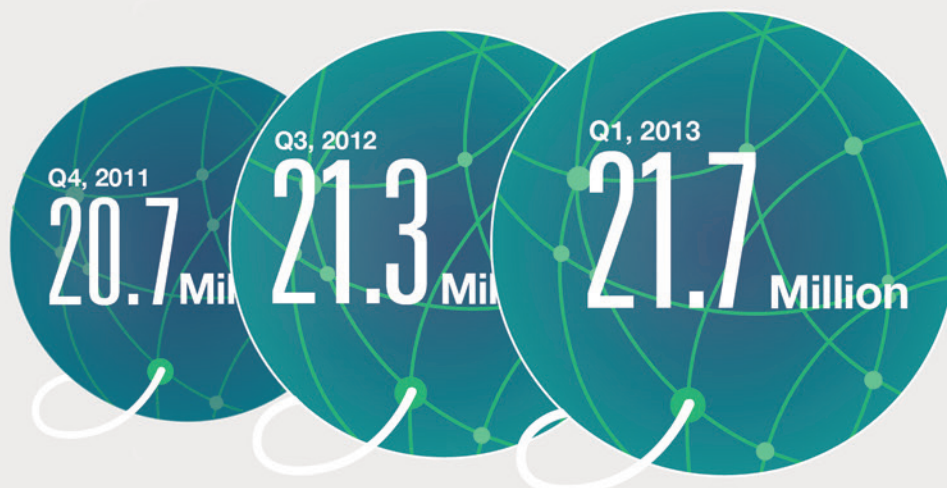
Broadband subscriber numbers (millions)

Source: Financial results for included companies

	2011				2012				2013	
	MAR	JUL	SEP	DEC	MAR	JUL	SEP	DEC	MAR	
BT	5.69	5.83	6.00	6.10	6.28	6.36	6.44	6.56	6.69	
Virgin Media	4.33	4.31	4.33	4.36	4.38	4.38	4.41	4.47	4.49	
Sky	3.16	3.33	3.49	3.84	3.86	4.00	4.10	4.20	4.39	
TalkTalk	4.20	4.17	4.13	4.08	4.07	4.05	4.04	4.05	4.06	
EE/Orange	0.73	0.71	0.71	0.71	0.71	0.71	0.72	0.70	0.69	
O2/BE	0.67	0.65	0.63	0.62	0.62	0.60	0.58	0.56	0.52	

Total fixed broadband connections

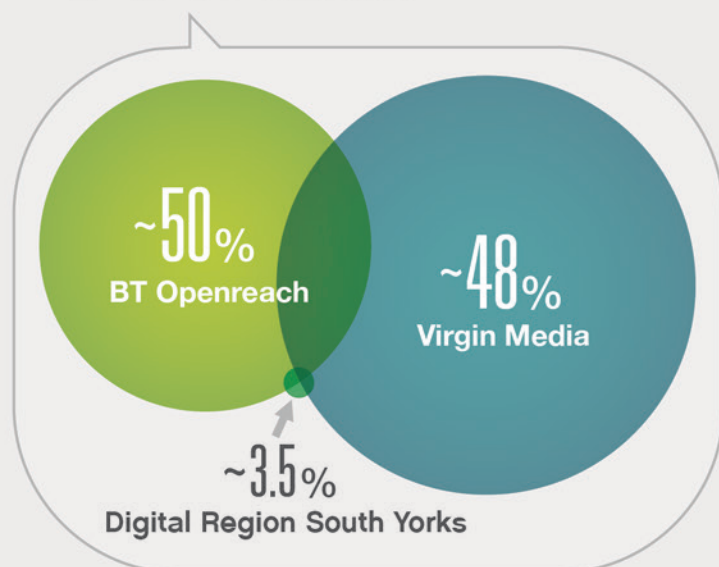
2010-2013, Source: Point Topic, Ofcom



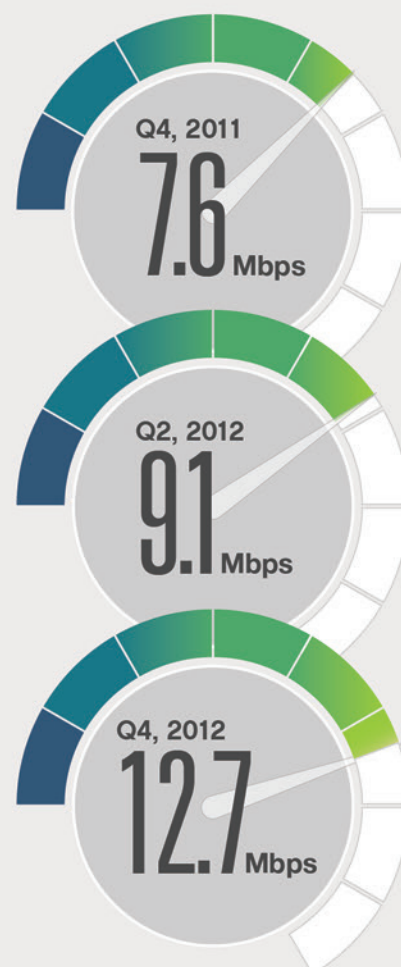
Broadband speeds

2012, Source: EU / Ofcom / Providers

70% ...Total UK households with access to superfast broadband

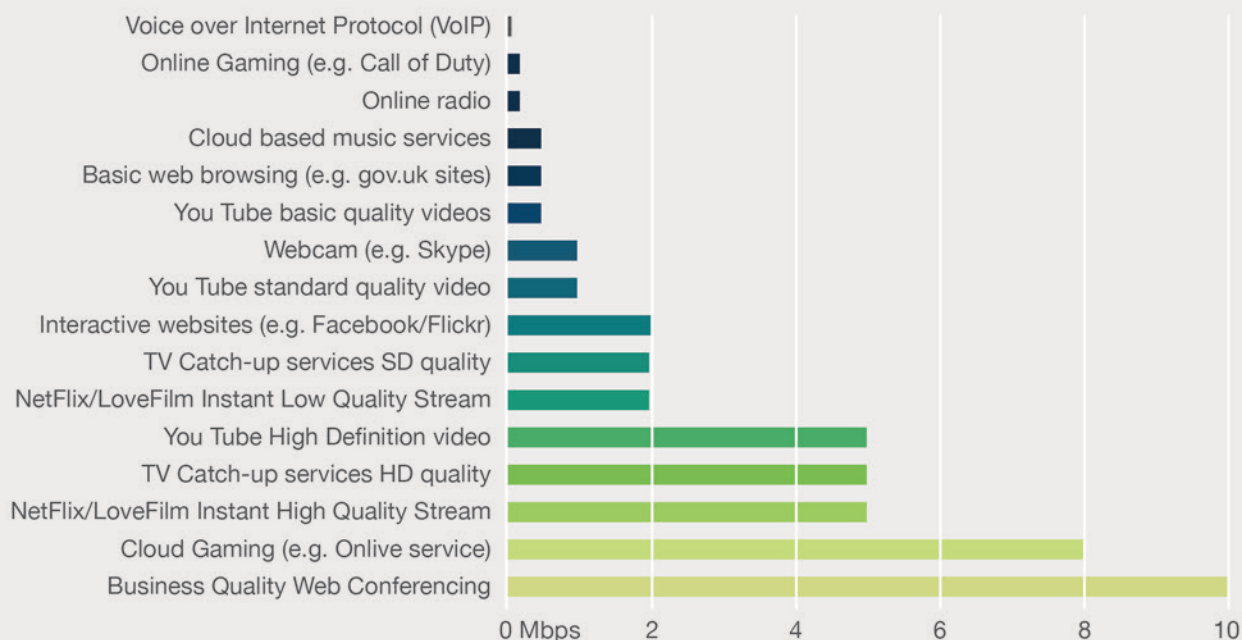


...Average UK measured broadband speed



Broadband connections what are they good for?

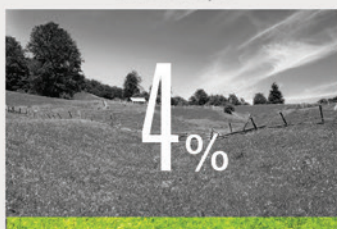
Source: thinkbroadband.com



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

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

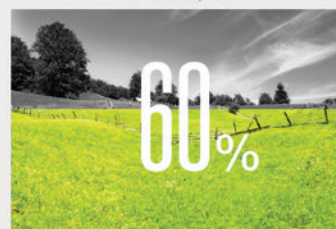
0.5 Mbps



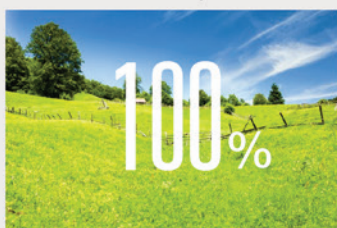
2 Mbps



7 Mbps



10 Mbps



20 Mbps



40 Mbps





Rural areas vs...

villages, hamlets, open countryside



Semi urban...

small towns 2,000 - 100,000



Urban

town / City population > 100,000

UK Population

Source: Ofcom



Standard & Superfast Broadband Availability

Source: Ofcom 2013

80.1%
Standard



21.2%
Superfast



96.9%
Standard



67%
Superfast



98.3%
Standard



86%
Superfast



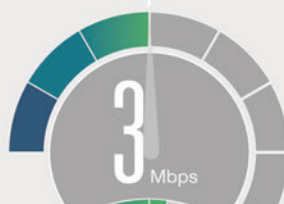
Average speed of connections...

May 2012

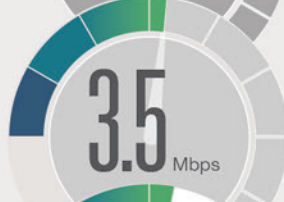
Source: Ofcom

Rural

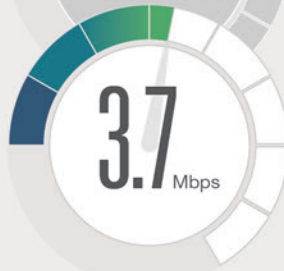
ADSL
up to 8 Mbps



Average all
connections

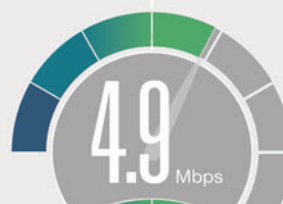


ADSL2+
up to 24 Mbps

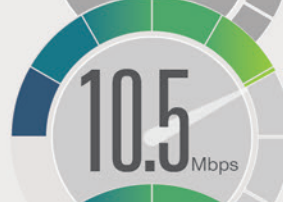


Urban & Semi-urban

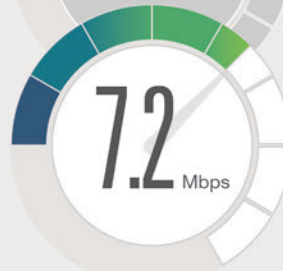
4.9
Mbps



10.5
Mbps

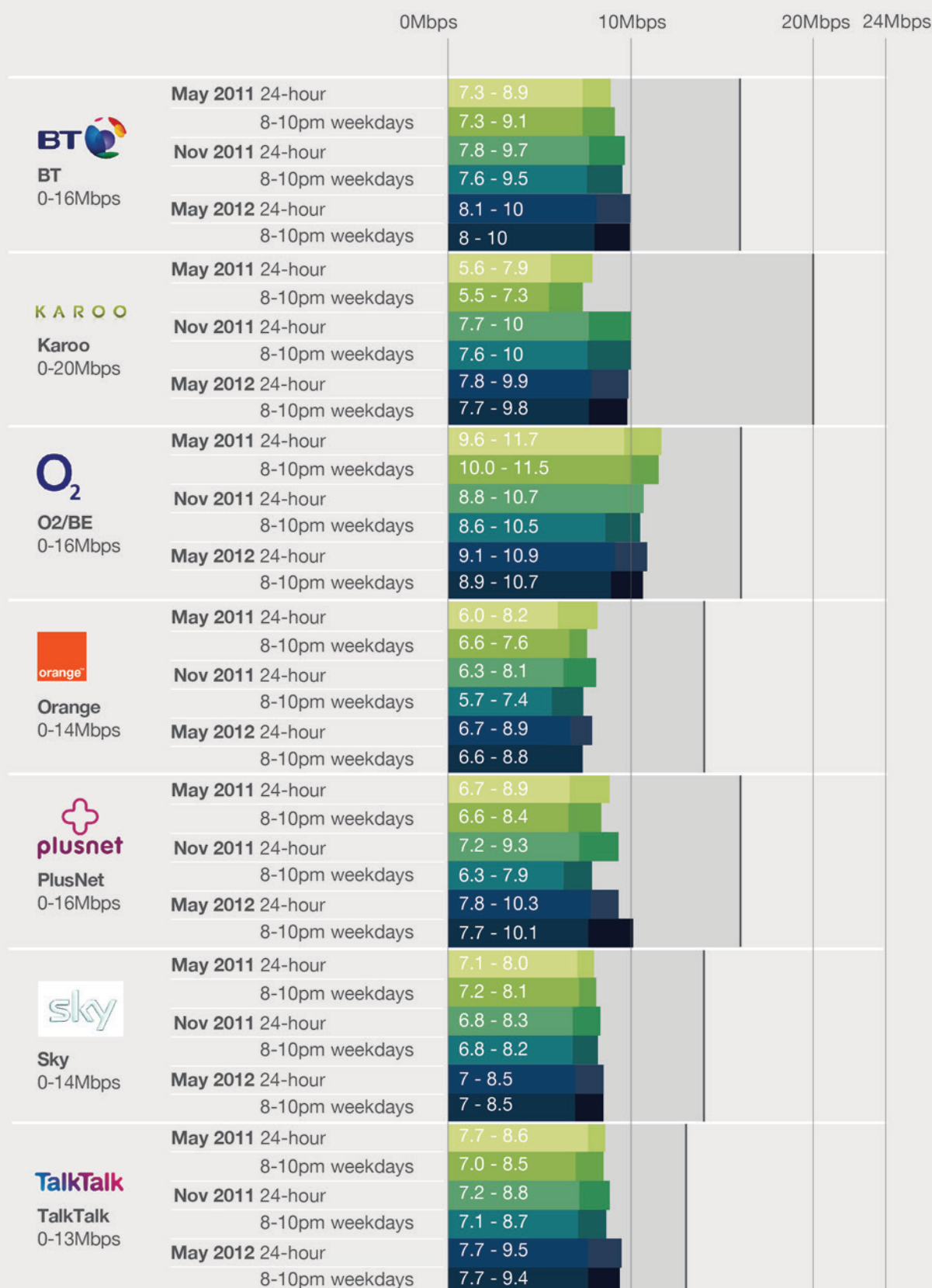


7.2
Mbps



Broadband speeds ADSL/ADSL2+ (up to 24 Mbps)

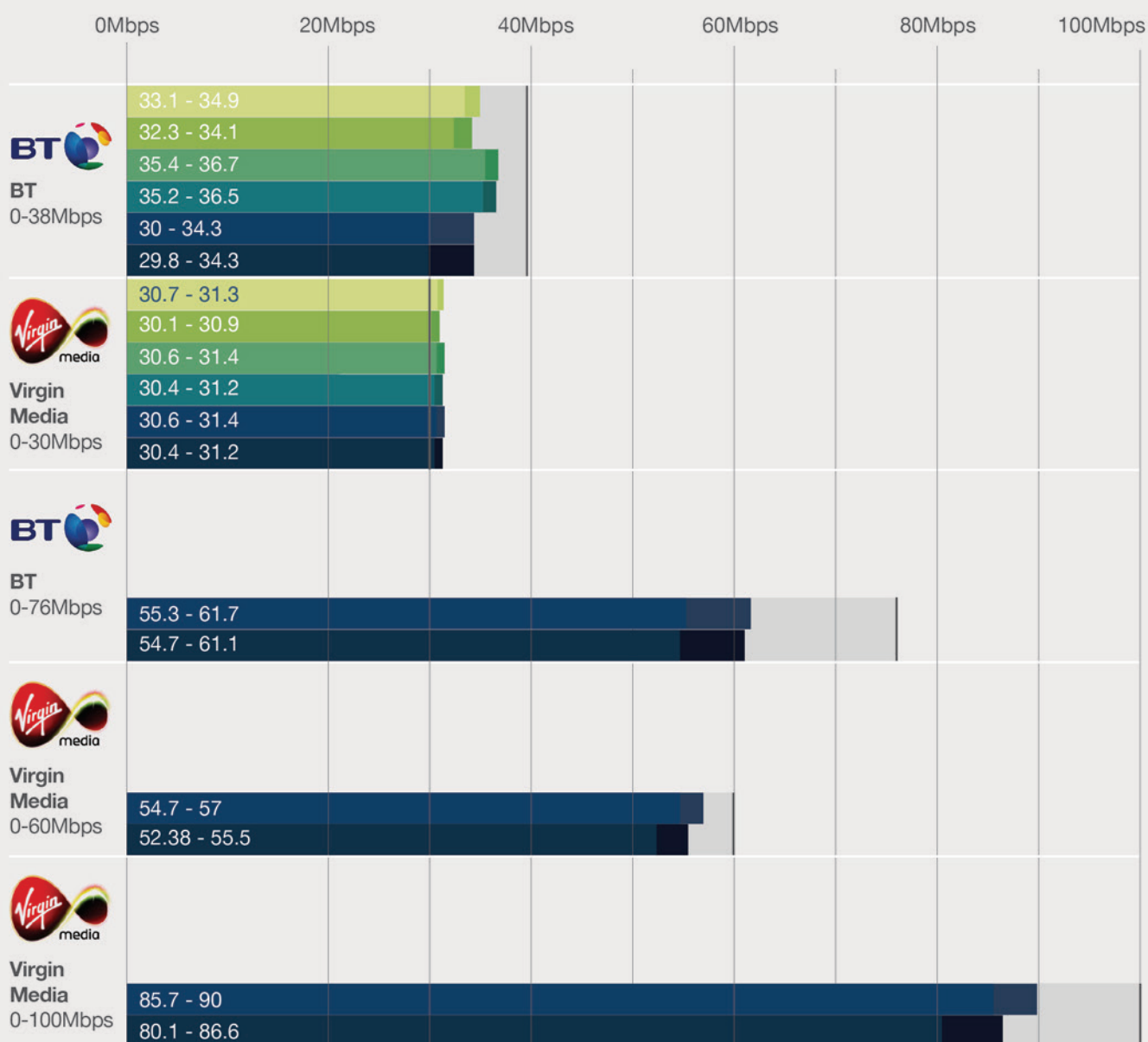
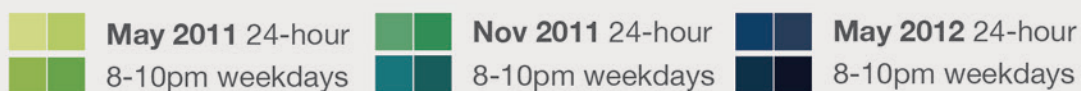
June 2012. Source: Ofcom



Broadband speeds - Superfast packages

June 2012. Source: Ofcom

Min - Max speeds



Broadband timeline: August 2000~January 2013

AUG 2000

Consumer 0.5 Mbps ADSL services launched.
Freeserve launches at £150 /setup + £39.99/month.
[Read more](#)

NOV 2004

BT Wholesale starts consumer IPStream Home 2000 (self-install 2 Mbps) trial.
[Read more](#)

MAR 2006

BT Wholesale launches its up to 8 Mbps Max and Max Premium (rate-adaptive ADSL) products.
[Read more](#)

SEP 2007

3 million unbundled lines in the UK.
[Read more](#)

DEC 2008

Virgin Media launches 50 Mbps broadband service.
[Read more](#)

MAY 2010

BT announces 'two thirds' of UK will get FTTC/FTTP fibre by 2015.
[Read more](#)

OCT 2010

UK government announces its aim to have the "best broadband in Europe by 2015".
[Read more](#)

JULY 2011

Virgin Media demonstrates 1.5 Gbps-capable cable broadband service and confirms 25% of UK homes can get their 100 Mbps service.
[Read more](#)

SEPT 2012

Cumbria signs BDUK contract with BT, 93% to have super fast broadband by end of 2015.
[Read more](#)

JAN 2013

B4RN FTTH network goes live in Arkholme Lancashire, the projects second village.
[Read more](#)

FEB 2002

Pipex launches first sub-£30 (incl. VAT) ADSL service. Industry follows later in month with wholesale price reductions.
[Read more](#)

APRIL 2005

BT Group announces five million ADSL users.
[Read more](#)

APRIL 2006

TalkTalk launches telephone and 'free' broadband for a combined total of £21.99/month.
[Read more](#)

JAN 2008

First few weeks of BBC iPlayer see 3.5 million programmes watched.
[Read more](#)

JUN 2009

Final Digital Britain Report published by Lord Carter calling for 2 Mbps Universal Service commitment by 2012.
[Read more](#)

OCT 2010

Virgin Media announces 100 Mbps service.
[Read more](#)

APRIL 2011

Broadband users in the UK reaches 19.5 million.
[Read more](#)

FEB 2012

Openreach announces FTTP on Demand for areas with FTTC to rollout in 2013.
[Read more](#)

DEC 2012

First BDUK funded cabinet installed in North Yorkshire.
[Read more](#)



2013

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.

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