

UK BROADBAND FACTSHEET

Q4 2013

Checkout last quarters major news online...

- ▶ **VIRGIN MEDIA ANNOUNCES NEW 152 MBPS SPEED TIER**
- ▶ **OPENREACH FIBRE BASED BROADBAND SERVICES BREAK 2 MILLION CUSTOMER MARK**
- ▶ **HYPEROPTIC CONTINUES TO GROW ITS GIGABIT FOOTPRINT IN LONDON**
- ▶ **EE TO PROVIDE A 4G POWERED HOME BROADBAND PACKAGE**
- ▶ **FIBRE BASED BROADBAND ROLL-OUT ANNOUNCED FOR FIRST 16,000 HOMES IN HIGHLANDS AND ISLANDS**

Inside...

Projection of UK broadband speeds in Summer 2015	P02
Broadband market share Updated	P03
Total fixed broadband connections	P04
Broadband connections what are they good for?	P05
Rural areas versus Semi Urban versus Urban	P06
Regional broadband speeds	P07
UK broadband speeds by postcodes	P08
Broadband timeline	P09
About thinkbroadband.com	P10

Projection of UK broadband speeds in Summer 2015

Source: thinkbroadband analysis of technological capabilities and local loop lengths

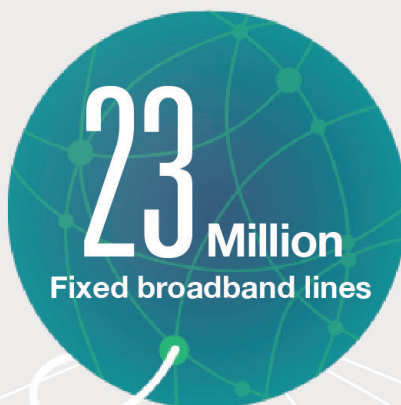
Revised: Summer 2013

Technology mix across UK

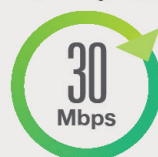
5% have option of FTTP via Openreach
2.5% have option of FTTP/B via Altnet
90% have option of FTTC via Openreach
50% have option of FTTN via Virgin Media
100% access to ADSL2+ or USC Alternative

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



Off peak speed

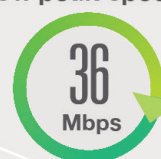


Figure of 23 million fixed broadband lines allows for growth of 2.7 million lines in next three years

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

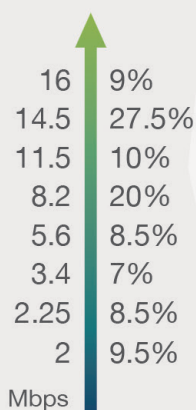
4.5 Million
Virgin Media

4.1 Million
Openreach FTTC

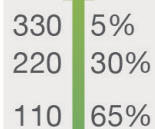
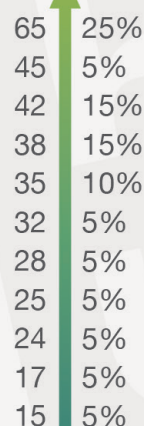
0.2M
Openreach FTTP

0.2M
Altnet FTTP/B

Speed increasing

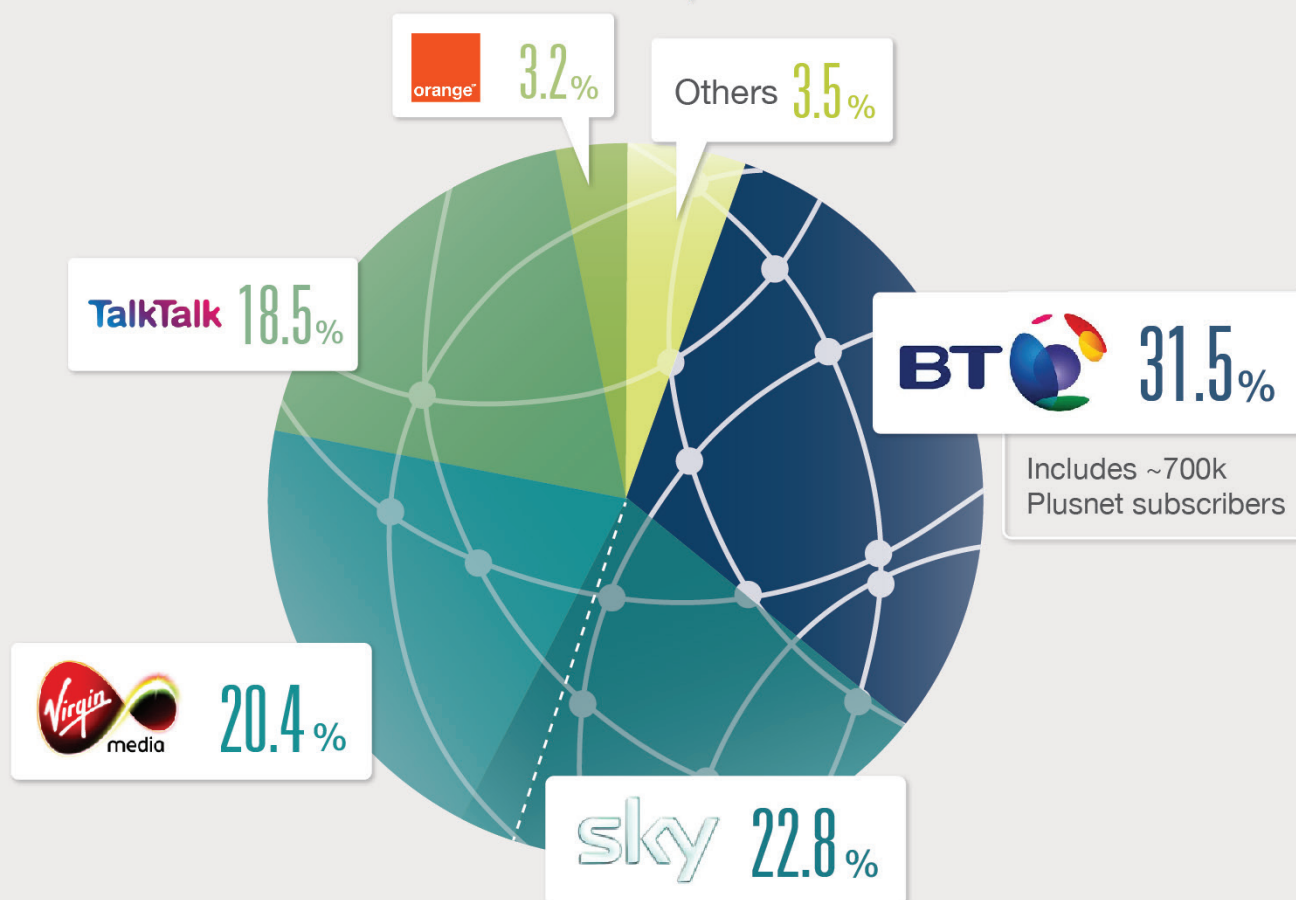


Speed split for this technology type



Broadband market share

Source: Providers' Quarterly Results to September 2013



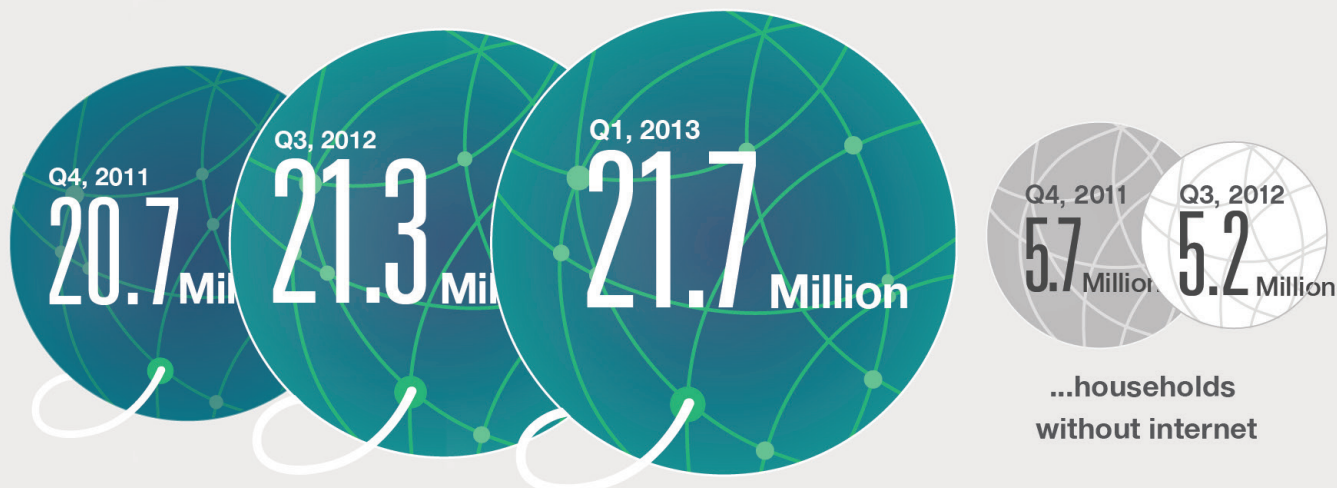
Broadband subscriber numbers (millions)

Source: Financial results for included companies

	2011		2012				2013			
	SEP	DEC	MAR	JUL	SEP	DEC	MAR	JUL	SEP	
BT	6.00	6.10	6.28	6.36	6.44	6.56	6.69	6.78	6.94	
Sky	3.49	3.84	3.86	4.00	4.10	4.20	4.39	4.91	5.02	
Virgin Media	4.33	4.36	4.38	4.38	4.41	4.47	4.49	4.47	4.49	
TalkTalk	4.13	4.08	4.07	4.05	4.04	4.05	4.06	4.07	4.08	
EE/Orange	0.71	0.71	0.71	0.71	0.72	0.70	0.69	0.70	0.71	

Total fixed broadband connections

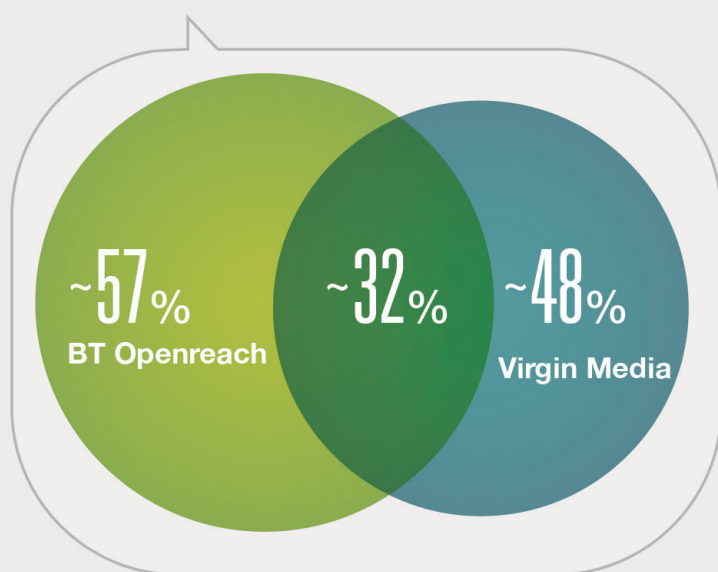
2010-2013, Source: Point Topic, Ofcom



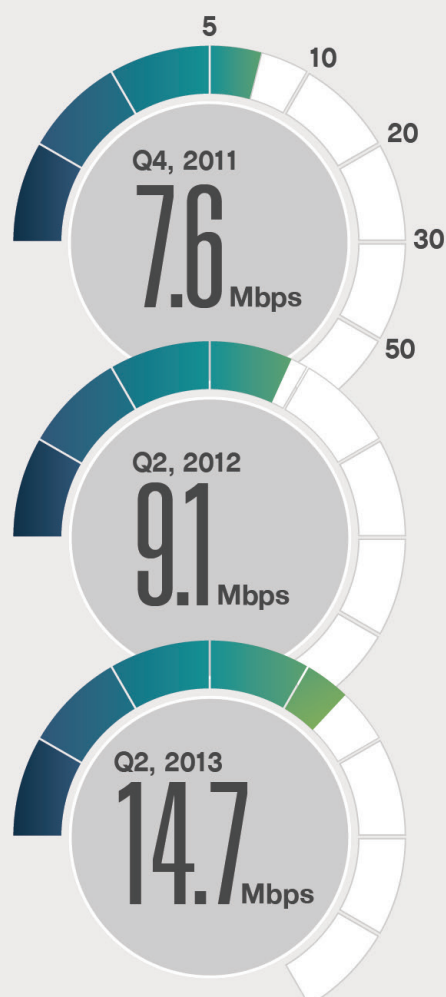
Broadband speeds

2013, Source: Ofcom

73% ...Total UK households with access to superfast broadband

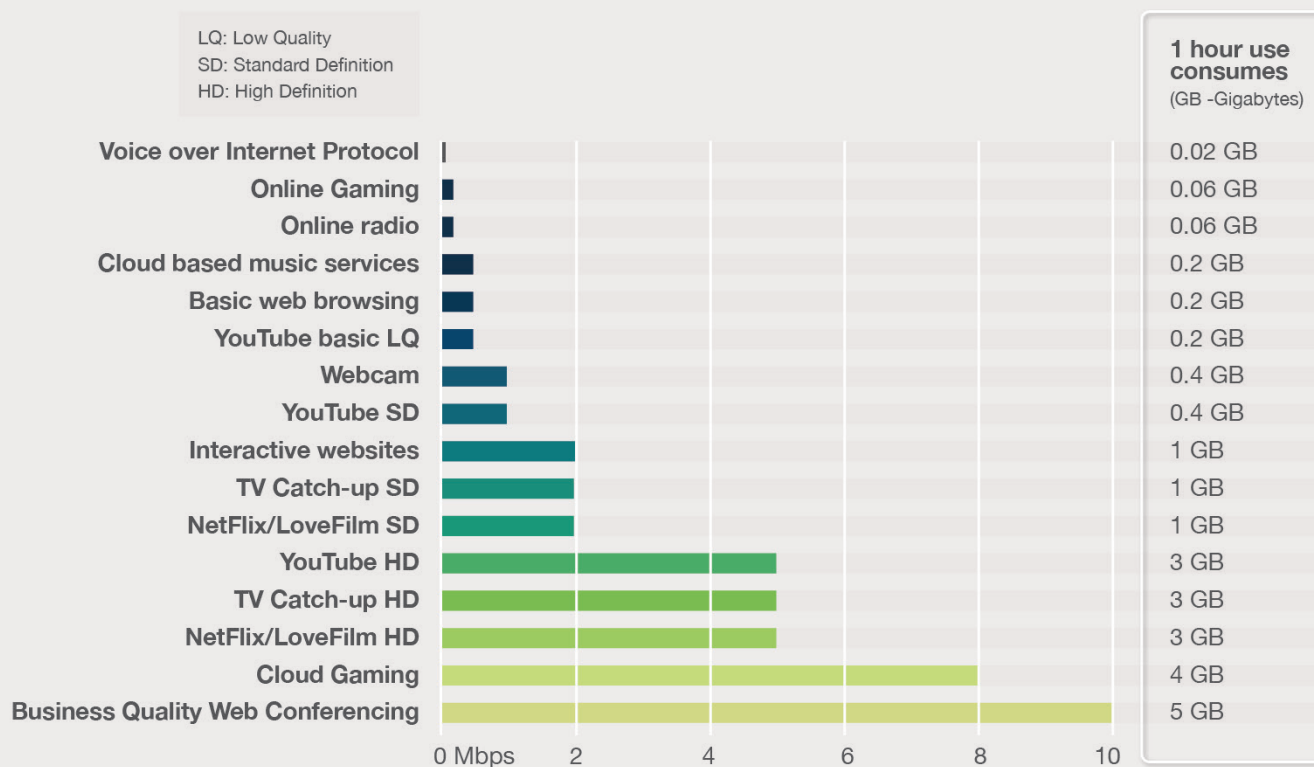


...Average UK measured broadband speed



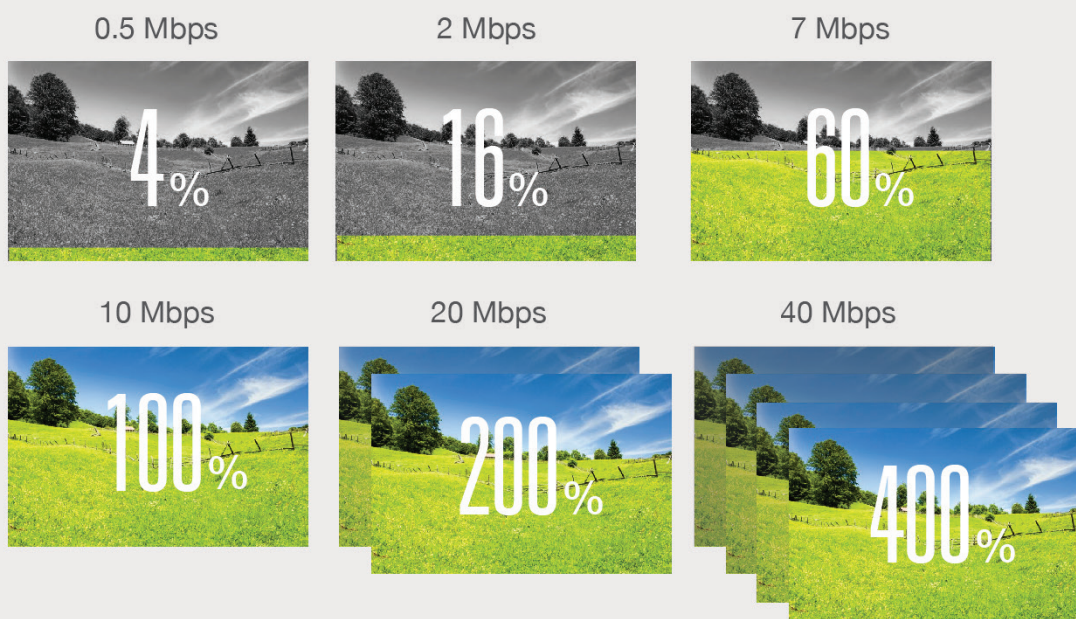
Broadband connections what are they good for?

Source: thinkbroadband.com



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

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





Rural areas vs...

villages, hamlets, open countryside



Semi urban...

small towns 2,000 - 100,000



Urban

town / City population > 100,000

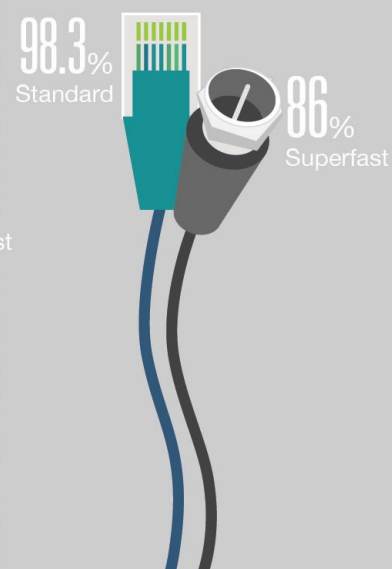
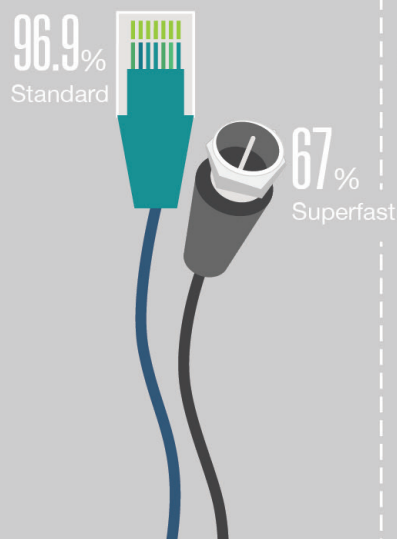
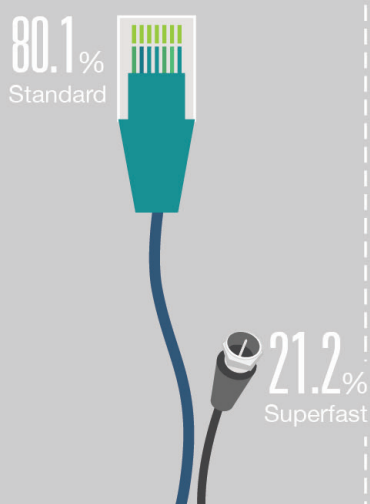
UK Population

Source: Ofcom



Standard & Superfast Broadband Availability

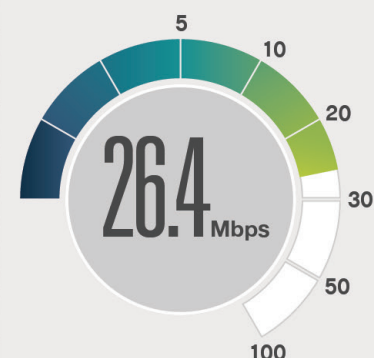
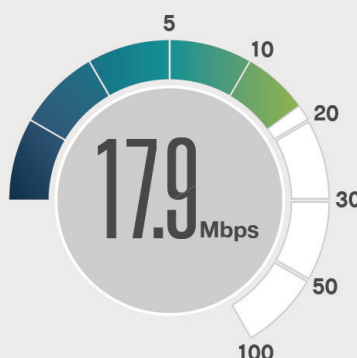
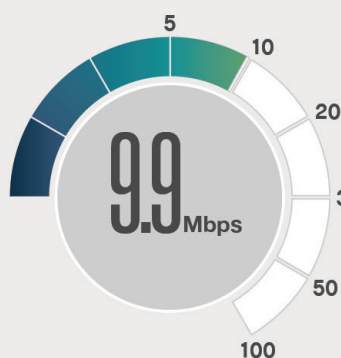
Source:
Ofcom 2013



Average speed of connections...

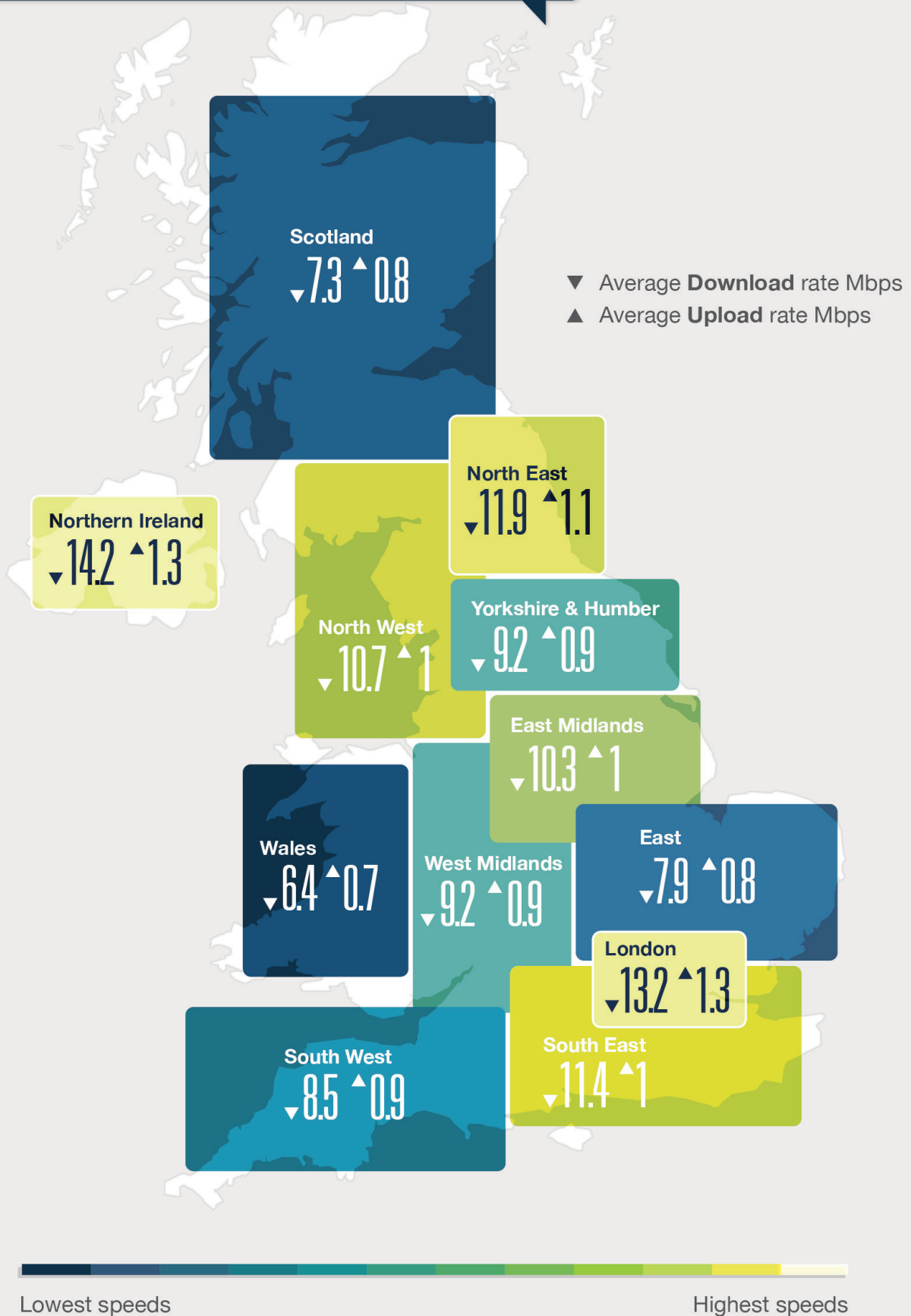
July 2013

Source: Ofcom



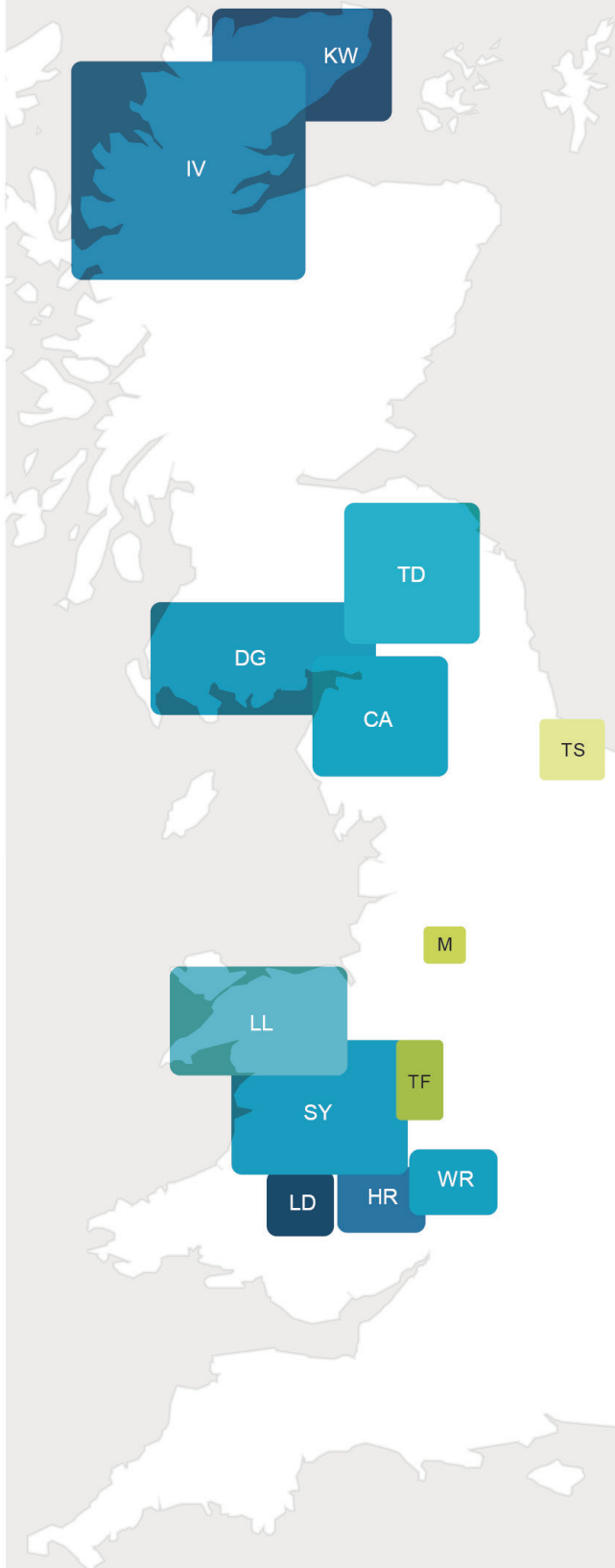
Regional UK Broadband Speeds

Source: thinkbroadband.com speed test results summer 2013



UK Broadband Speeds by Postcode

Source: thinkbroadband.com speed test results summer 2013



▼ Average **Download** rate Mbps

▲ Average **Upload** rate Mbps

10 slowest postcode areas

Llandudno (LL)	▼ 5.9 Mbps	▲ 0.7 Mbps
Galashiels (TD)	▼ 5.6 Mbps	▲ 0.4 Mbps
Carlisle (CA)	▼ 5.3 Mbps	▲ 0.6 Mbps
Wrexham (WR)	▼ 4.9 Mbps	▲ 0.6 Mbps
Shrewsbury (SY)	▼ 4.8 Mbps	▲ 0.8 Mbps
Dumfries & Galloway (DG)	▼ 4.7 Mbps	▲ 0.4 Mbps
Inverness (IV)	▼ 4.4 Mbps	▲ 0.4 Mbps
Hereford (HR)	▼ 3.9 Mbps	▲ 0.5 Mbps
Kirkwall & Orkney (KW)	▼ 3.8 Mbps	▲ 0.4 Mbps
Llandrindod Wells (LD)	▼ 2.4 Mbps	▲ 0.4 Mbps

10 fastest postcode areas

Sutton (SM)	▼ 19.8 Mbps	▲ 1.9 Mbps
Cleveland (TS)	▼ 18.7 Mbps	▲ 1.6 Mbps
Watford (WD)	▼ 16.8 Mbps	▲ 0.7 Mbps
Manchester (M)	▼ 16.5 Mbps	▲ 1.0 Mbps
Harrow (HA)	▼ 16.2 Mbps	▲ 1.7 Mbps
Telford (TF)	▼ 16.1 Mbps	▲ 1.1 Mbps
Ilford (IG)	▼ 16.0 Mbps	▲ 1.6 Mbps
Romford (RM)	▼ 16.0 Mbps	▲ 1.9 Mbps
Uxbridge (UB)	▼ 15.9 Mbps	▲ 1.7 Mbps
Enfield (EN)	▼ 15.8 Mbps	▲ 1.8 Mbps

Broadband timeline: August 2000~August 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 Virgin Media announces 100 Mbps service. [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](#)

AUGUST 2013 Digital region in South Yorkshire closure announced after only attracting 3,000 customers and spending £100 million. [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 UK government announces its aim to have the "best broadband in Europe by 2015". [Read more](#)

APRIL 2011 Broadband users in the UK reaches 19.5 million. [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](#)

AUGUST 2013 100,000 premises passed by Broadband Delivery UK (BDUK) projects. Eventual goal is 4.5 million premises.

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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