

Broadband indicators: a UK perspective

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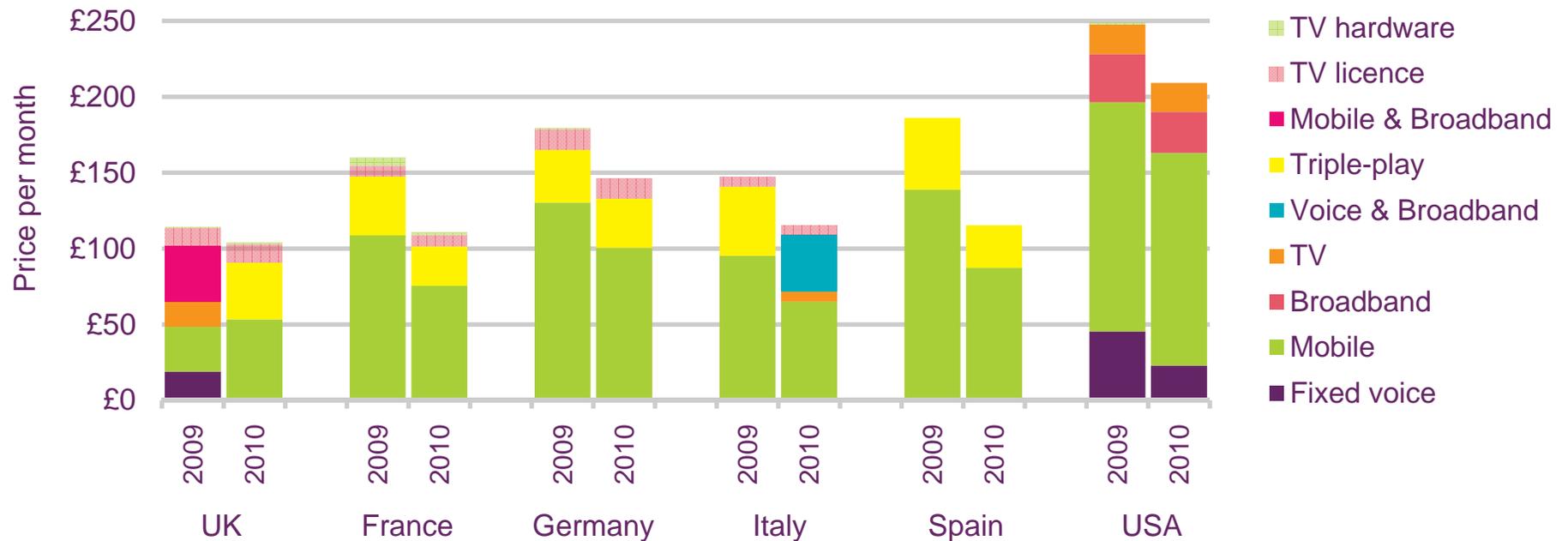
Four key dimensions

1. Prices
2. Coverage and take-up
3. Speeds
4. Demographics



1. Prices... the challenge of comparing prices in a bundled world

A typical 'basket' of communications services for a family household



Source: Ofcom using data supplied by Teligen, published in :

http://stakeholders.ofcom.org.uk/binaries/research/cmr/753567/icmr/ICMR_2010.pdf

Note: Lowest tariff available for each service type from any of the three largest operators by market share in each country including multi-play offers July 2009 and July 2010; PPP adjusted.

2. Mapping broadband take-up and availability... a data collection challenge



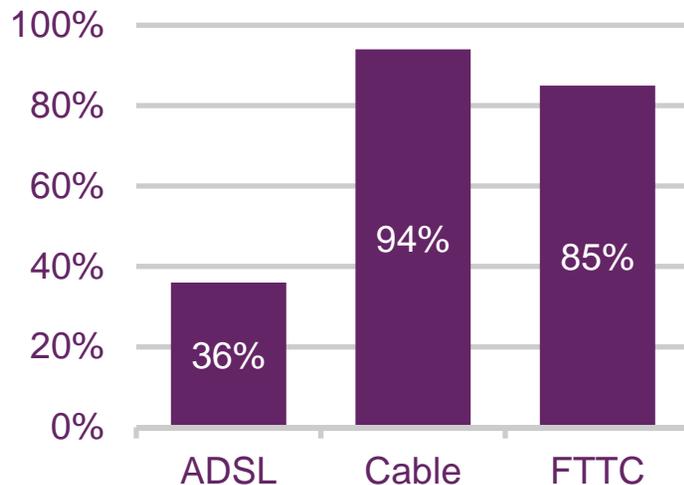
Local Authority	Average sync speed (Mbit/s) (excluding superfast)	score	Percentage receiving less than 2Mbit/s	score	Superfast broadband availability	score	Take-up (excluding superfast)	score	Overall
Castell-nedd Port Talbot - Neath Port Talbot	7.6	4	15.9%	4	58%	3	60%	3	3
Castlereagh	7.1	4	18.0%	4	97%	1	63%	3	2
Central Bedfordshire	7.5	4	13.8%	3	67%	3	73%	2	2
Cheshire East	6.7	4	16.9%	4	67%	3	71%	2	3
Cheshire West and Chester	6.7	4	17.0%	4	43%	4	70%	2	3
City of Bristol	9.9	3	4.5%	1	90%	1	71%	2	1
City of Derby	8.4	3	11.1%	3	89%	2	65%	3	2
City of Edinburgh	10.1	2	4.5%	1	82%	2	69%	3	1
City of Kingston upon Hull	7.3	4	7.2%	2	0%	5	50%	4	4
City of Leicester	8.8	3	8.3%	2	89%	2	65%	3	2
City of Nottingham	9.1	3	8.2%	2	88%	2	62%	3	2
City of Peterborough	7.2	4	18.2%	4	76%	2	68%	3	3
City of Plymouth	8.7	3	10.3%	3	88%	2	69%	3	2
City of Portsmouth	8.9	3	10.2%	3	95%	1	67%	3	2
City of Southampton	8.0	3	10.3%	3	46%	4	67%	3	3
City of Stoke-on-Trent	7.6	4	13.5%	3	78%	2	58%	4	3
City of Wolverhampton District	9.1	3	6.9%	2	93%	1	60%	3	1

Source: Communications Infrastructure Report 2011 (July 2011), <http://maps.ofcom.org.uk/broadband/downloads/ofcom-uk-broadband-speed-report-2011.pdf>

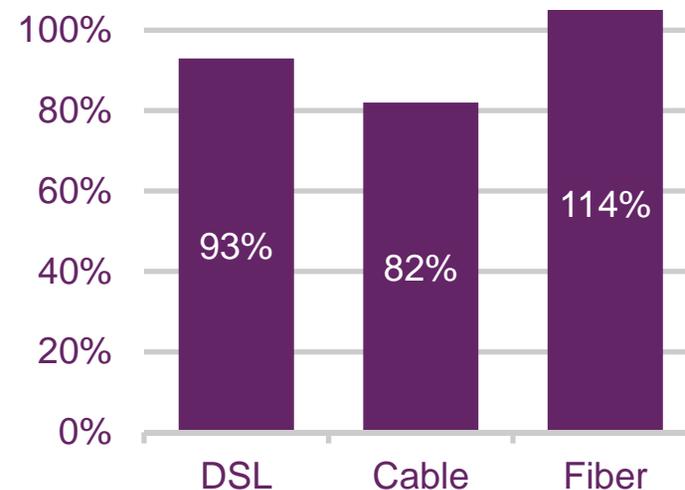
3. The need for (actual) speeds information

Average download speed as a proportion of advertised speed, based on actual measurements

UK (May 2011)



US (March 2011)



Average actual download speed: 6.8Mbit/s

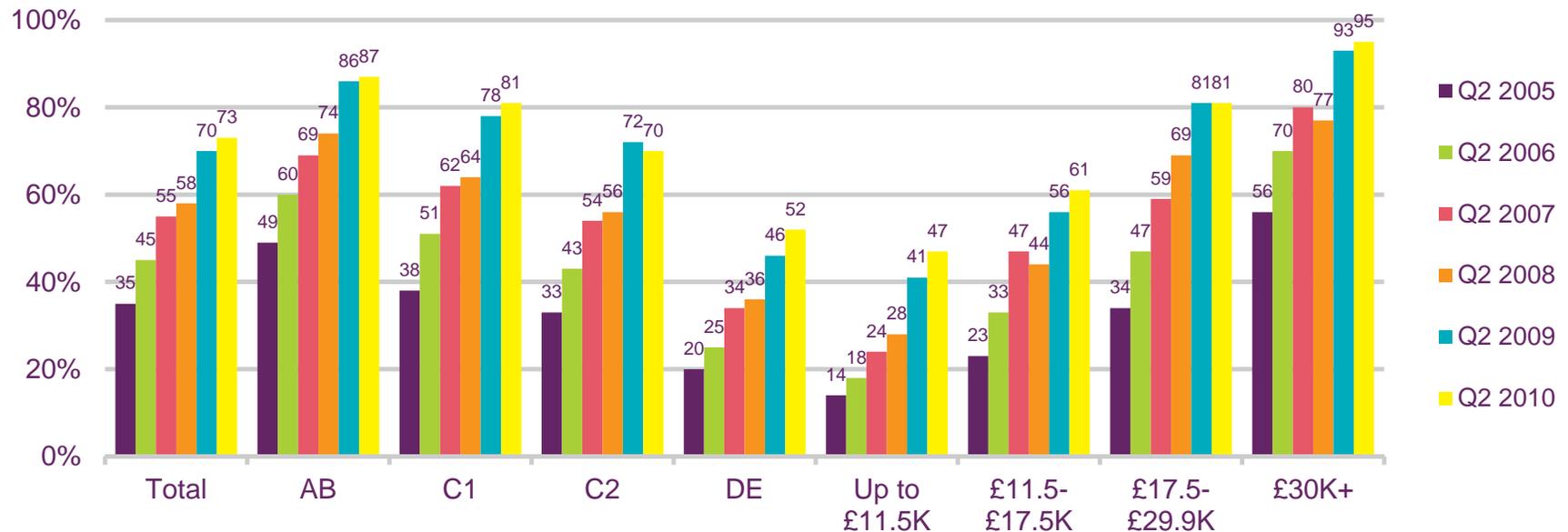
Average advertised download speed: 15.0Mbit/s

Source: Ofcom, UK Fixed-line Broadband Performance, <http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/bbspeeds2011/bb-speeds-may2011.pdf>

Source: FCC, Measuring Broadband America http://transition.fcc.gov/cgb/measuringbroadbandreport/Measuring_U.S. - Main_Report_Full.pdf

4. Surveying the nation is the best way of getting demographic information

Socio-economic and income profile of those who have broadband access at home



Source: Ofcom, The Consumer Experience, 2010

<http://stakeholders.ofcom.org.uk/binaries/research/consumer-experience/tce-10/consumer-esperience-10.pdf>

A final thought...

