A brief note on broadband statistics in the United Kingdom

Ewan Sutherland

http://ssrn.com/author=927092
Research Associate, LINK Centre (Wits University) and CRIDS (University of Namur)

Data concerning the adoption of broadband and the Internet in the United Kingdom (UK) point to saturation of demand for fixed broadband and, it appears, a decline in the adoption of the Internet in some areas.

In its report on market developments in the UK, the Office of Communications (OFCOM) provides data for broadband in the four nations: England, Northern Ireland, Scotland and Wales. While it reports continued growth at the UK level, both for urban and, more strongly, rural areas, it is clear that growth in Scotland is saturating or stagnating, whereas Northern Ireland and Wales have seen continued strong growth (see Figure 1).

Figure 1  Broadband in first quarter of year¹ (note: no data available for 2007)

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The Office for National Statistics (ONS) provides data for households which have Internet access (see Figure 2), while not the same as broadband the two have become closer. In particular, the ONS provides data for the regions of England. Its sample for Scotland excludes the Islands and the Highlands north of the Great Glen, while no surveys have been undertaken in Northern Ireland.

Figure 2  Households with Internet access by country and region, 2008 to 2010²

![Bar chart showing Internet access by country and region, 2008 to 2010](chart.png)

These data confirm the stagnation of growth in Scotland, at levels well below the UK average, a phenomenon also seen in the East of England. More surprisingly, the ONS shows a decline in Internet adoption in North-East and South-West England.

The ONS qualifies annual data as being an estimate, for which it provides 95 per cent confidence limits (see Figure 3).

In its surveys the ONS also asked if respondents had ever used the Internet (see Figure 4). Here the North-East is conspicuously lower than other regions, but not the South-West. London, perhaps unsurprisingly, shows the highest level of Internet adoption.

Statistics from quarterly surveys in Scotland confirm the apparent stagnation of growth (see Figure 5). They do not appear to show any surge in use from mobile devices, with the levels being consistent with the use of the fixed Internet.
Issues

The data show that in parts of the UK stagnation in the growth of Internet adoption has already occurred and is doing so at different levels of penetration. The reasons for the different levels are most likely related to socio-demographic factors, with poorer households less inclined or less able to pay for Internet access.

The decline in some parts of England and, very possibly in some other parts of the UK, is less easily explained. The timing might suggest a link to the global financial crisis, though it is not clear why this should have hit North-East and South-West England disproportionately – perhaps household repossessions or redundancies might have been higher in these regions or more foreign workers might have returned home. A more optimistic, perhaps overly optimistic, possibility would be a switch from fixed to mobile Internet. While the ONS reports strong growth in the adoption of the mobile Internet it does not yet provide a regional breakdown. However, this is not intuitively easy to link to such a strong regional effect. A further possibility is some sort of error in the survey, within the confidence limits, though again a strong regional effect in one or two years is not easily explained. It seems possible that the stagnation of growth is due, at least, in part to some groups giving up Internet access.

Whatever the underlying reasons, the UK strategy for digital participation clearly requires to contain means to reverse these trends if national, UK and EU targets for the adoption of superfast broadband are to be achieved.

The publication of 2011 survey data from ONS and OFCOM promise to be very interesting.

3 http://www.scotland.gov.uk/Topics/Statistics/16002/DataTrendsInternet