

1. What does GBES mean?

GBES stands for Global Broadband Experience Scorecard. GBES is an analytical framework that combines ICT research data with consumer feedback to understand the nature of the actual experience of using broadband in a set of countries. The analysis seeks to clarify what it is that contributes to an excellent broadband experience.

2. What is different about GBES?

GBES is different to other broadband studies as it specifically seeks to combine high level market data with specific insight drawn from a survey of consumer broadband usage experiences. The analysis therefore draws on what consumers actually think of their broadband experience.

3. How will the GBES project develop over time?

The current project has researched the consumer fixed broadband experience. Ovum plans to look at the consumer mobile broadband experience to create an analysis of the integrated consumer experience that reflects how consumers move from the home environment to Wi-Fi hotspot and mobile broadband environments. Future projects may also look at the enterprise broadband experience.

4. What are the components of the GBES?

The scorecards look at four high level variables. There are two macro variables that include a range of national broadband data-points, including data on current broadband penetration as well as the rate of broadband growth. There are also two micro variables that include a range of data points on consumer views about the network, and their satisfaction with the experience of using a number of broadband applications (such as web browsing, email, video download/streaming etc).

5. Which broadband applications have been researched?

The consume survey asked about the usage of using email, general web browsing, downloading / listening to music, online gaming, downloading / streaming short video and long form video, social networking, and online shopping. Of these, the survey looked in more detail at the experience with web browsing, video, music, and gaming.

6. Why is the consumer view important?

While it is of course valuable to gather data on macro market indicators, and hard network performance measurements, it is important to recognise that end users form a view on how well they think their broadband is delivering a good experience, the underlying constituents or factors of such a good experience, and how well they see and value each of these constituents or factors. These end users are the paying customers of service providers, and however well the service providers think they are doing, if the customer is not happy they will be more likely to churn. The Voice of Customers will be a valuable guidance to operators in planning their investment in delivering good broadband experience. The research demonstrates that providing high bandwidth and quality of network is not sufficient to guarantee that the customer is happy with their experience.

7. Why have the results been compiled into regional scorecards?

There are many ways to group countries. They could for example be grouped by maturity, regulatory stance, or by average broadband speed. However, a more intuitive grouping is by geographic region where countries can compare themselves against their regional peers. However results can also be cumulated into a global ranking.

8. What are the key elements of an excellent broadband experience?

There are three key components to delivering consumers an excellent broadband experience: Firstly the network performance must be stable, able to deliver a wait time of less than 3 seconds, with rare or zero buffering; Secondly, the network has to have a minimum download speed of 10Mbps for basic applications and SD Video

(50Mbps for UHD/HD); and thirdly, the service provider must offer excellent customer service (highly responsive provisioning, activation, and restoration, and issue resolution at first contact).

9. Which regions and countries have the best broadband experience?

Globally, Sweden is in first place, followed by Romania, Canada, Singapore, and South Korea. Europe is the best performing region where Sweden is the leading European market, performing well on all metrics.

Asia is the second best performing region despite of the mixed maturity of development, with Singapore the leading market.

The developing markets in Americas and MEA are found having encouraging sign of improvement in delivering broadband customer experience. The UAE and Canada are respective regional leaders.

10. What do the GBES results mean for service providers and regulators?

The results show that service providers need to be aware that the performance that consumers expect from the network is constantly increasing and that as they grow more sophisticated in their usage their performance expectation is likely to exceed what the network can deliver. Churn risk will need to be managed by offering exceptional customer service and support.

The results show that regulators need to encourage service providers to build networks capable of supporting at least 10Mbps download speed, and QoE of zero to maximum 3 secs waiting time, never to rare buffering and excellent rating picture quality, recognising that this is the new minimum that consumers see as delivering an acceptable experience.

11. What is the key message that readers should get from this white paper?

Demand on the network is always going up; network performance and speed also need to go up to keep up with demand. But the actual end user broadband experience appears not quite as good as might be expected given the network, so service providers need to work even harder to 'bridge the gap' and meet expectations.

The end consumer view of their overall broadband experience is important as it can direct service providers how to bridge the gap between network performance and customer expectation.