

The Global Broadband Experience Scorecard aims at leveraging the many different factors that drive the consumer experience of broadband. By analysing a broad set of indicators from 30 countries, the methodology generates a series of four regional scorecards that allow the diversity of the broadband experience to be fully analysed and discussed.

The Broadband Experience Model comprises of four key variables:

- **Current connectivity** – looks at the broader national broadband environment that shapes the technical and competitive landscape.
- **Growth momentum** – measures the way that national markets are evolving and growing.
- **Consumer network score** – uses results from a bespoke consumer survey to gather views on perceived network performance.
- **Consumer application experience** – uses results from the same consumer survey to measure the consumer experience with services and applications.

Each of the four variables contains a selection of national metrics as defined in annex 1, with data drawn from established internationally accepted data sources, Ovum's proprietary databases, new desk research, or the bespoke consumer survey.

- **Current connectivity (8 metrics):** number of competitors, fixed broadband penetration, relative penetration of fast broadband, international bandwidth per internet user, fixed broadband affordability, telecom investment as a % of GDP, ICT activity per person, average download bandwidth.
- **Growth momentum (5 metrics):** national broadband plan scored by several sub-variables, growth rate of fixed broadband subscriptions, rate of conversion to faster fixed broadband access, growth of IPs per capita, Growth of average bandwidth.
- **Consumer network score (8 metrics):** home broadband speed, web page load time, music track download time, gaming lag, short video start time, short video buffering, long video or TV program buffering. Additionally includes average national download bandwidth as a stabilising indicator.
- **Consumer application experience (8 metrics):** meets expectation for broadband speed, overall rating for installation, overall rating for service reliability, overall rating for broadband speed, overall rating for internet browsing experience, overall rating for music listening experience, overall rating for short video experience, overall rating for long video experience.

The consumer survey utilised an online panel to gather views from 500 respondents in each of 30 countries, delivering a total sample of over 15,000 fixed broadband users. National samples were then normalised to ensure representation. The consumer survey focusses on the consumer perception of network performance issues as experienced when using broadband applications, as well as their overall experience of using those applications. Applications include email, general web surfing, downloading / listening to music, online gaming, downloading / watching short video, and longer video / TV programs, using social networks, and online shopping.

For each indicator, each country received a score of 1 to 5 (where 1 is low, 5 is high) depending on the relevant data. Inputs were initially analysed to develop quintile categories, and countries allocated a rating depending on which quintile their score falls into. In all cases, the data inputs were first measured against a normalizing variable (e.g., population size) to ensure that country data was benchmarked according to relative levels of connectivity rather than absolute market sizes (which would be more reflective of the size of the economy).

Within each variable, indicators received a weight. The indicator ratings were then aggregated to form a score for each of the four variables and the four variables were then given equal weight to derive the final variable score. The overall index score was then calculated by aggregating the four variables.

In this way, the overall country score is based on an equal blend of all four variables main variables.

The final stage of analysis was to compile four regional scorecards based on regional country groupings. For this analysis it was decided that regional scorecards would allow a more intuitive analysis and comparison of regional peers, since the focus of the study is less on comparative network performance, and more on how end users vary in their perceptions and expectations of broadband.

To support the analysis a short program of stakeholder qualitative interviews were conducted with a selection of regulators, service providers, and content / OTT providers worldwide. These interviews were used to provide additional country context and background. Additionally, gaining insight into the thoughts and concerns of key regional market players allows the development of more finely tailored conclusions and actions to be formulated.