



European Broadband
Consumer Survey 2024
No need for more speed?

February, 2024



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No need for more speed?

European broadband consumers are less demanding than expected: They are satisfied with their providers, tolerate comparatively unreliable connections, and favor stability over speed. At the same time, many are open to using mobile 4G/5G connections as a substitute for traditional landlines. These findings and many more are available in the first edition of Deloitte's pan-European Broadband Consumer Survey, for which 13,000 consumers provided insights into their broadband usage behavior. The study proves: Despite the heterogeneous structures of the different broadband markets, European consumer requirements are broadly the same.



European Broadband Consumer Survey | No need for more speed?

In early 2024, the baseline supply with home broadband infrastructures varied greatly across Europe. For example, the proportion of home connections faster than 250 Mbit/s was 2.5 times higher in Spain than in Germany. But all countries have one thing in common: Nowhere in Europe is the reliability of home broadband truly outstanding or satisfying. Between 20 percent and a third of respondents, depending on the country, experience problems with their internet connection at least once a month.

But despite all the shortcomings, the vast majority of European broadband consumers are surprisingly happy with their home internet providers: Satisfaction is well above 75 percent everywhere. Differences in consumer satisfaction are much smaller than the range of average speed levels. The technology used also has much less impact on the broadband user experience than expected: Fiber is ahead in most countries, but only by a narrow margin. A similar picture

emerges for mobile networks. In fact, consumer happiness with mobile infrastructures is even higher than for home broadband.

What matters to European broadband consumers when it comes to their internet connection? In view of frequent reliability problems, it is not surprising that they favor stability over speed. Price is an equally important success factor. By contrast, customer service comes last on the list of priorities. Another conclusion from the study: Fixed wireless access (FWA) is becoming a real alternative in Europe. Almost half of all European broadband consumers can imagine doing without a wired connection. However, awareness of fixed wireless access solutions still varies considerably across Western European countries.

We hope you enjoy reading our latest study and gain actionable insights.



About the study



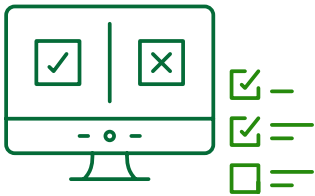
First edition of Deloitte's pan-European broadband consumer research



>13,000 respondents



Covers seven core markets in Western Europe: DE, FR, UK, IT, ES, NL, BE



Interviews conducted via **online survey**



Representative results, weighted by age and gender

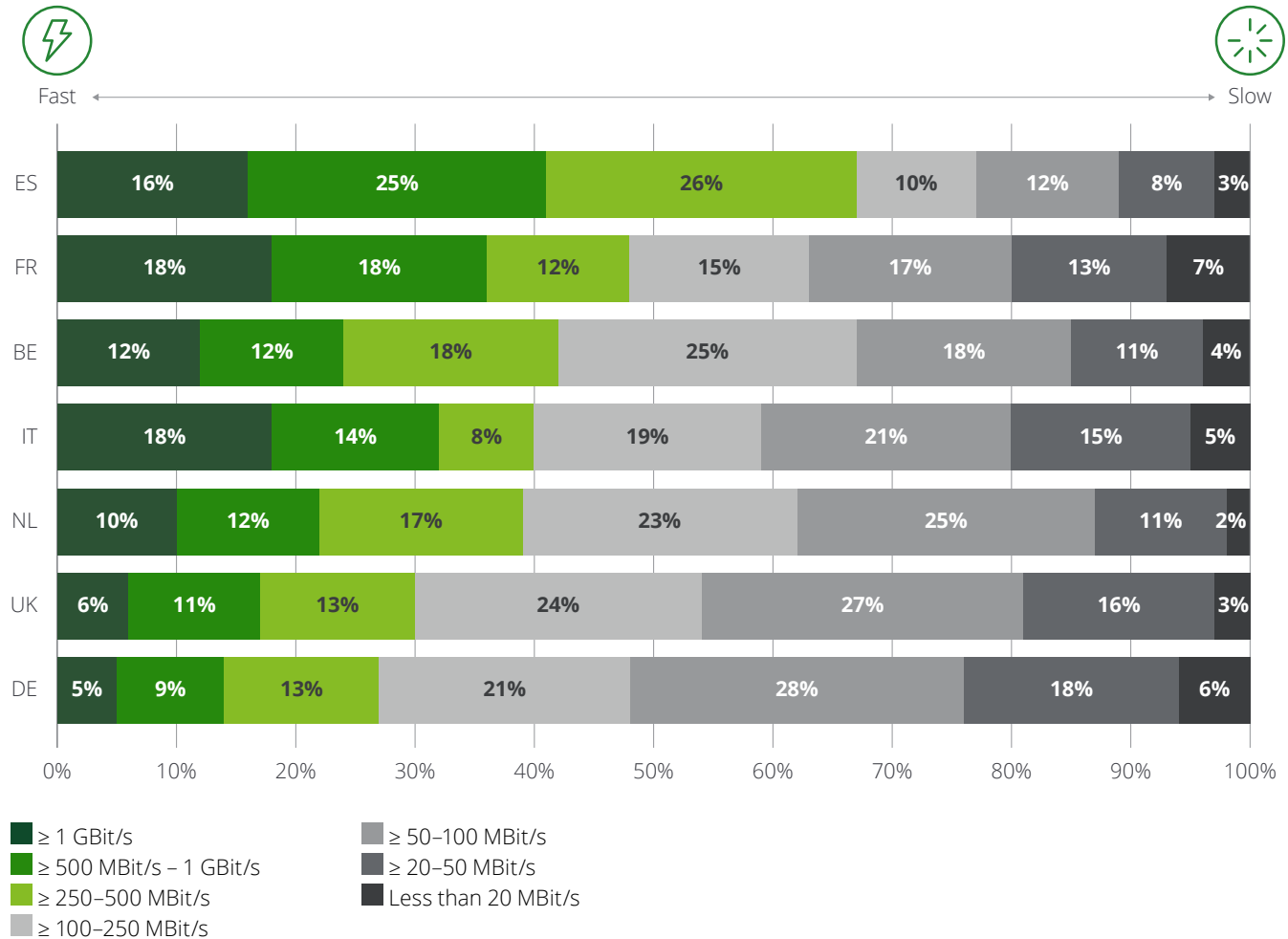


Survey period: **January 2024**

The baseline for home broadband infrastructures varies greatly in European countries.

There are huge differences in the speed level of European home broadband connections. For example, the share of high-speed internet connections faster than 250 Mbit/s is 2.5 times higher in Spain than in Germany. Meanwhile, connections below 50 Mbit/s play a minor role almost everywhere in Western Europe.

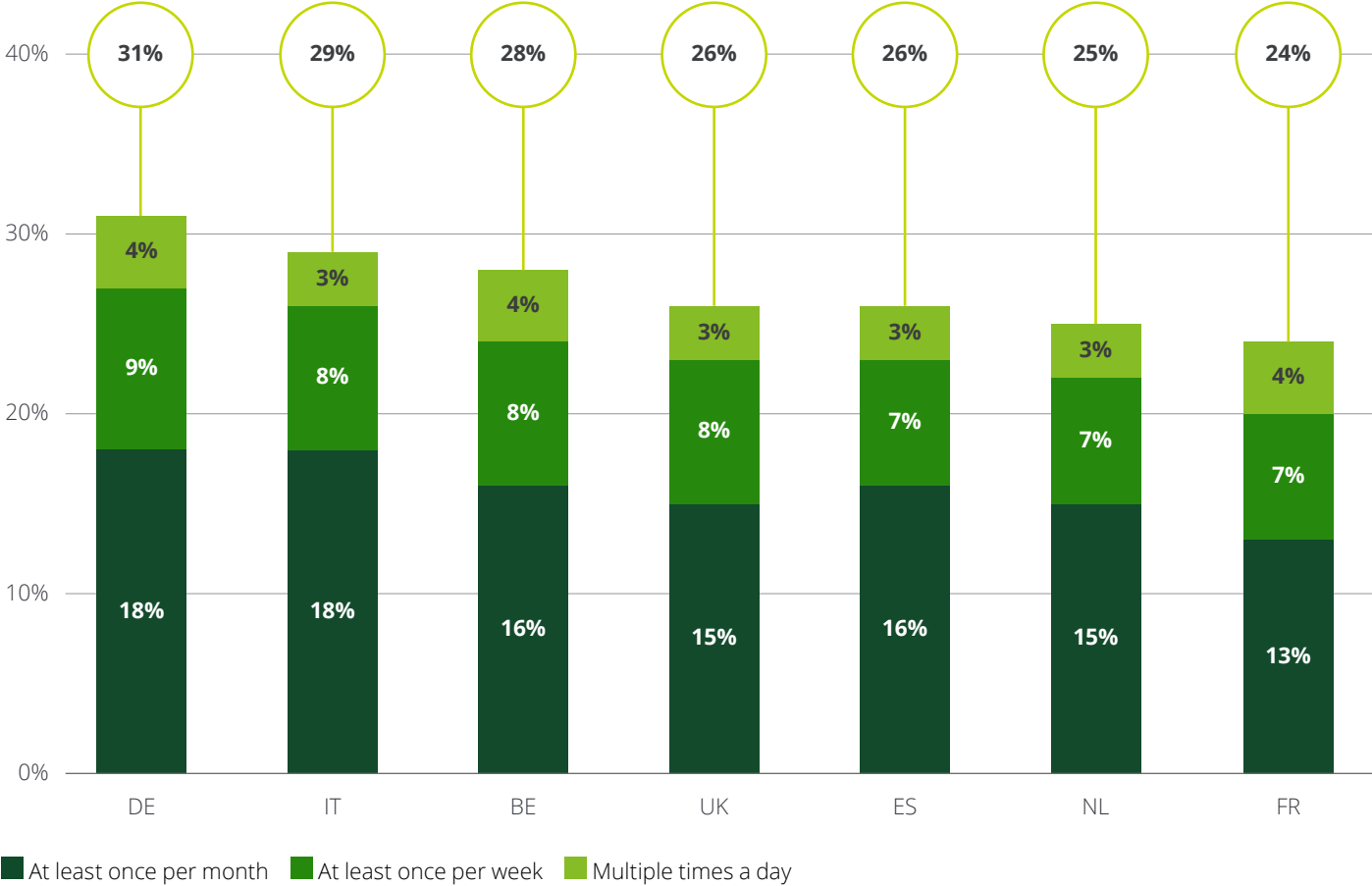
Fig. 1 – Which speed has your provider promised to provide for your home connection?



Nowhere in Europe is the reliability of home broadband truly outstanding.

Problems with broadband access at home are prevalent. Compared to utility networks like gas, water, or electricity, issues with internet connections are much more common. Problems are particularly severe in Germany, but also occur in countries with a wide spread of fiber infrastructure (e.g., Italy or the UK).

Fig. 2 – How often have you had problems* with your home broadband connection in the last year?

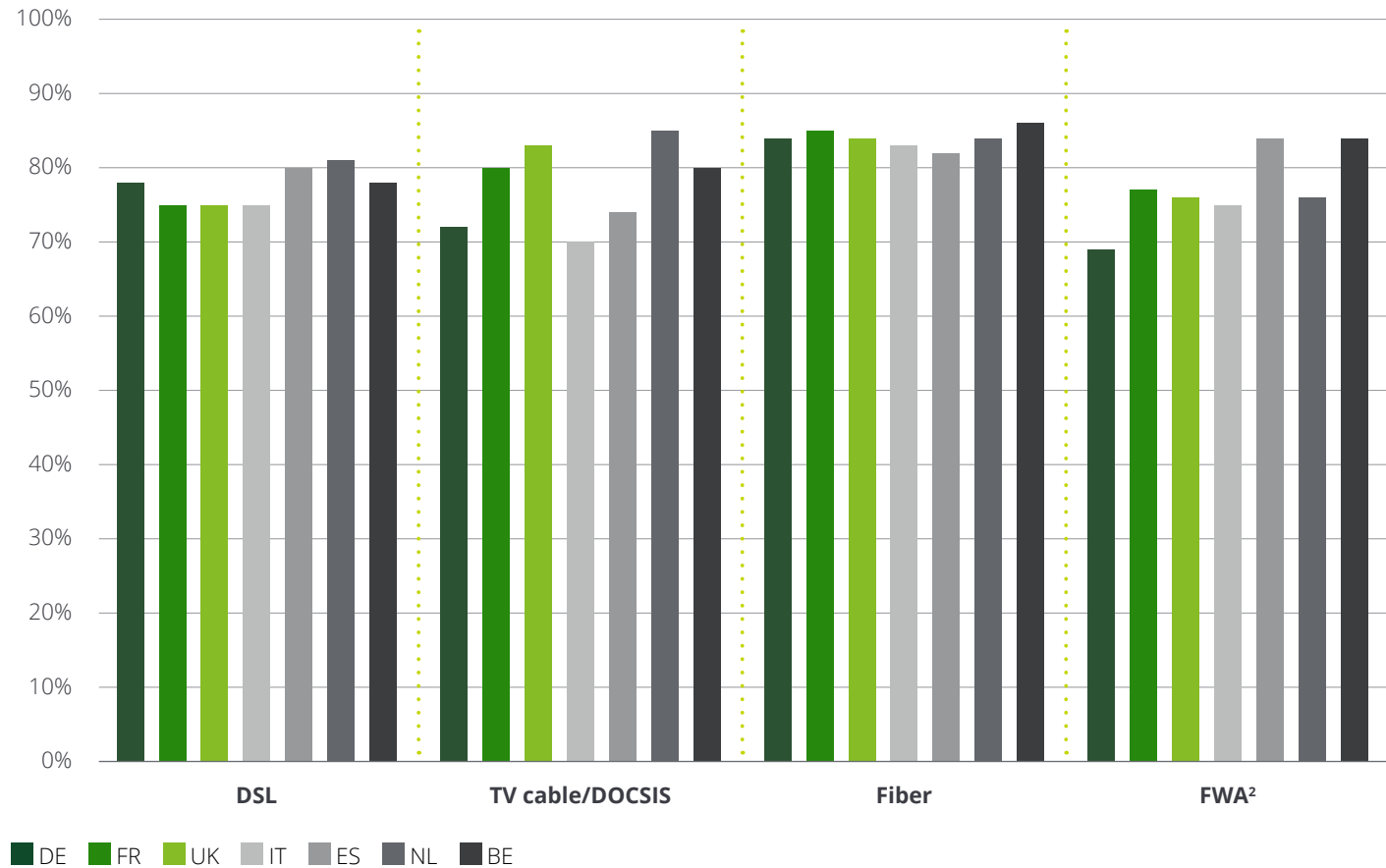


*) e.g., signal failures or extremely slow connections

The technology used has only little influence on the level of home broadband satisfaction.

Whether fiber, DOCSIS, DSL or FWA: infrastructure technology impacts the broadband customer experience very little. Country-specific factors often outweigh technological differences. Fiber is only slightly ahead in terms of customer satisfaction.

Fig. 3 – Consumers who are satisfied¹ with their current home broadband service provider (by technology)



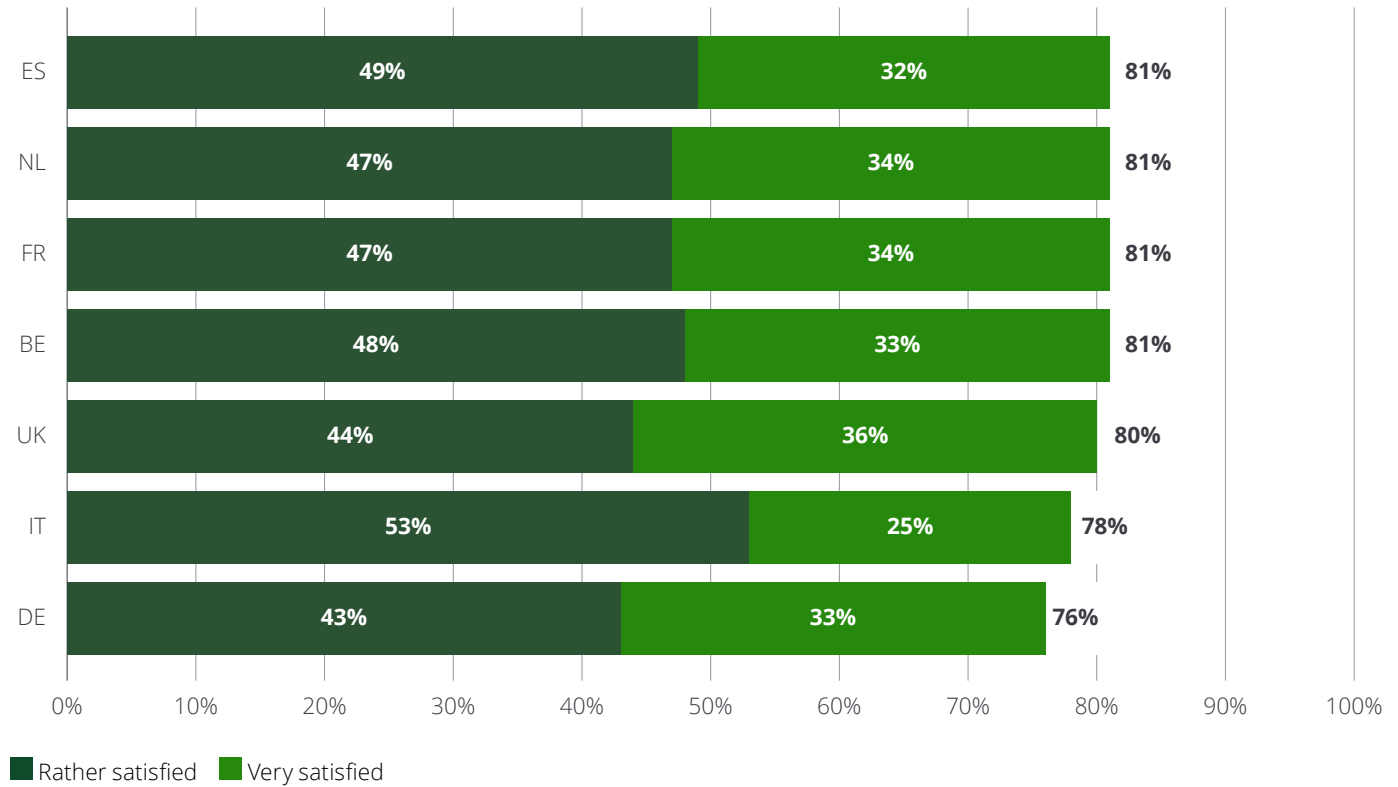
¹ sum of very satisfied and rather satisfied

² incl. informal FWA via tethering

Despite all shortcomings, European broadband users are happy with the services offered by their internet providers.

Differences in satisfaction by country are much smaller than the discrepancies in the speed levels of the infrastructures used. Nevertheless, the correlation between network performance and satisfaction is obvious.

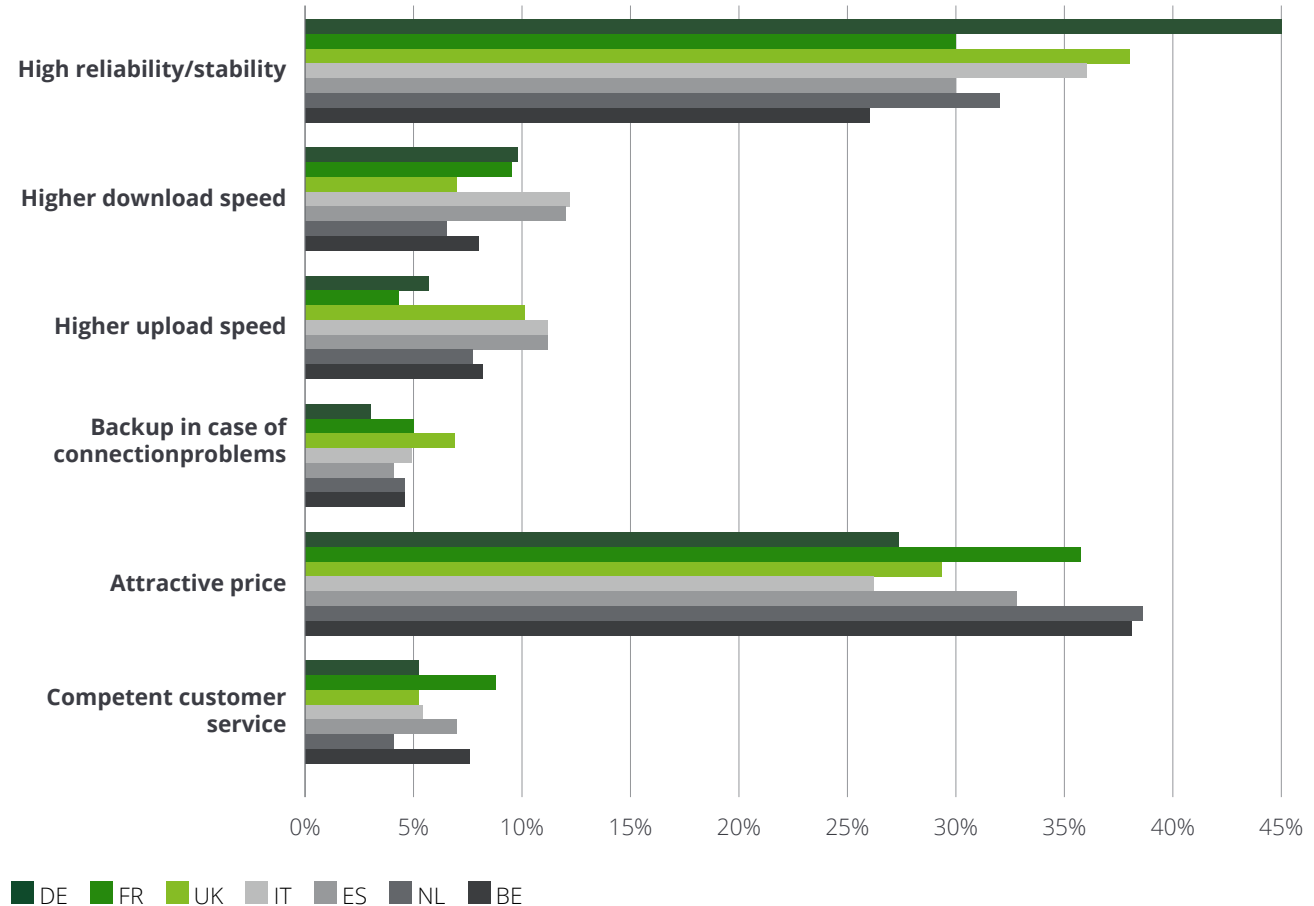
Fig. 4 - How satisfied are you with your current home broadband service provider?



Stability beats speed on the broadband consumer's wish list. Price is also crucial; customer service less so.

In addition to this cross-national trend, there are country-specific differences: When switching to new home internet access, Germans tend to look for reliable connections even more than their European neighbors, while consumers from Belgium and the Netherlands are more price-sensitive. Customer service comes last in the list of priorities.

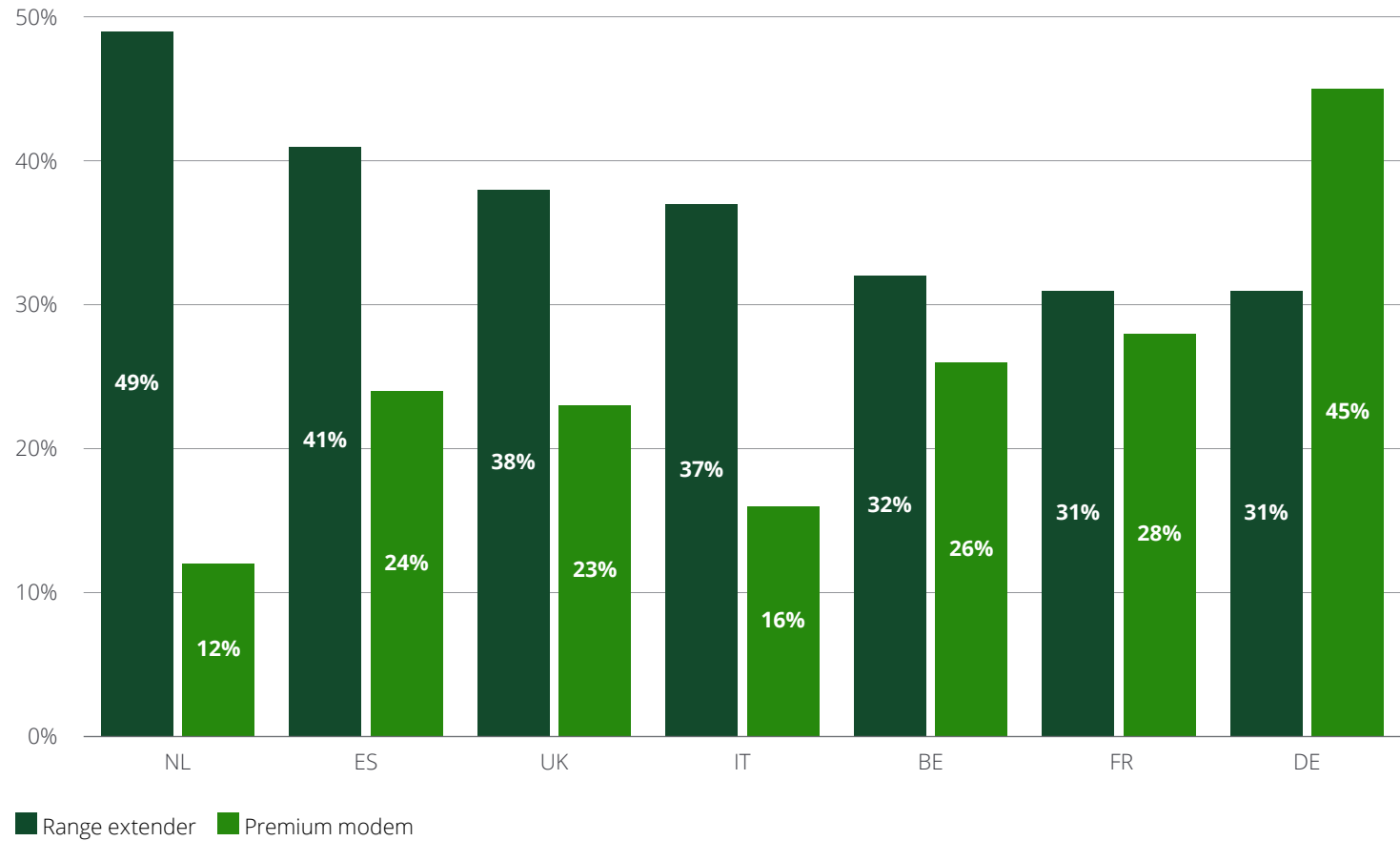
Fig. 5 – What do you consider to be the most important factor when thinking about a future internet connection for your household?



Some consumers rely on range extenders or premium modems to improve in-house coverage.

Measures to improve home networks are not uncommon, but by no means mainstream. Dutch internet users in particular improve their home broadband with range extenders. In contrast, premium modems are popular in Germany.

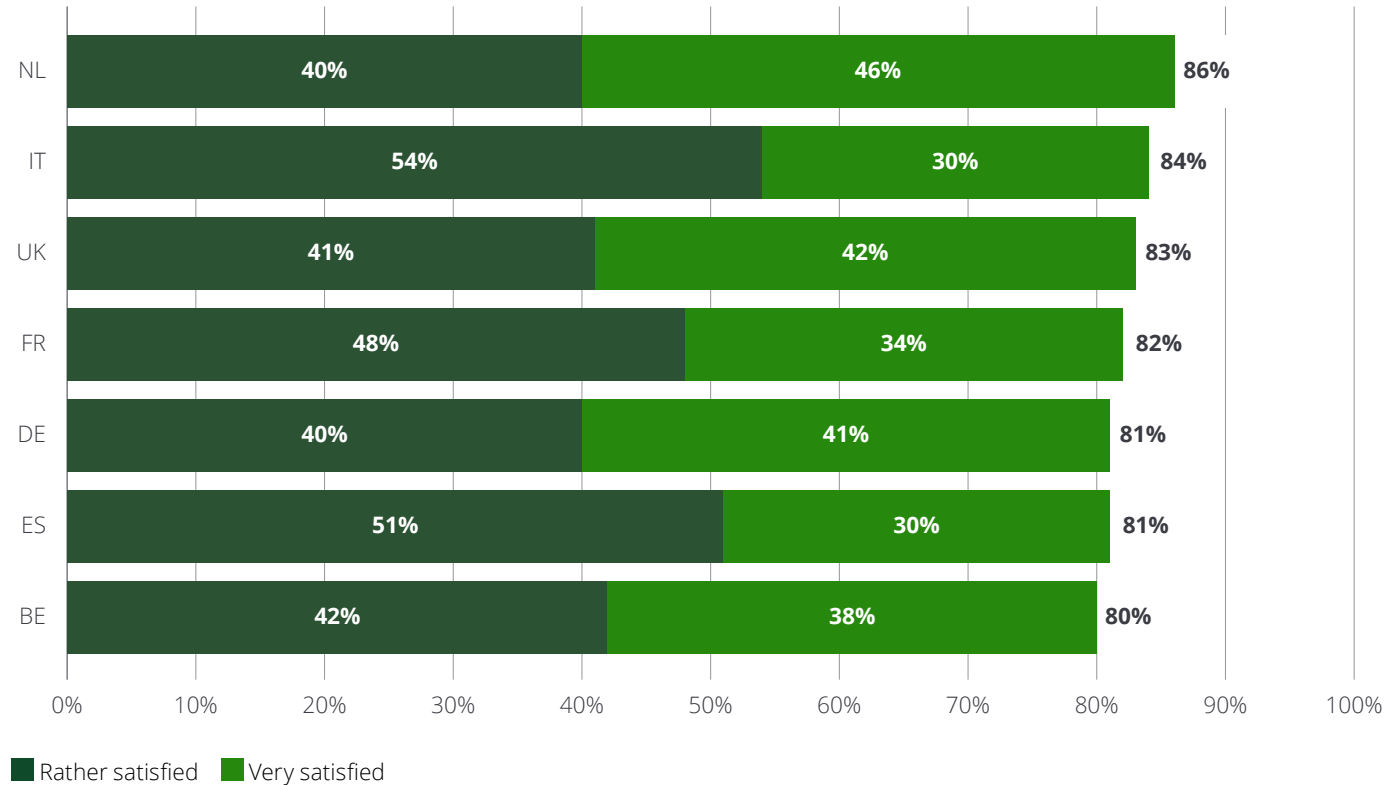
Fig. 6 – Do you use range extenders and/or premium modems to ensure WLAN coverage in your apartment or house?



Like home broadband, consumers are also highly satisfied with their mobile network providers.

Happiness with mobile infrastructures is even higher than for home broadband. The degree of satisfaction in individual countries is at a rather similar level.

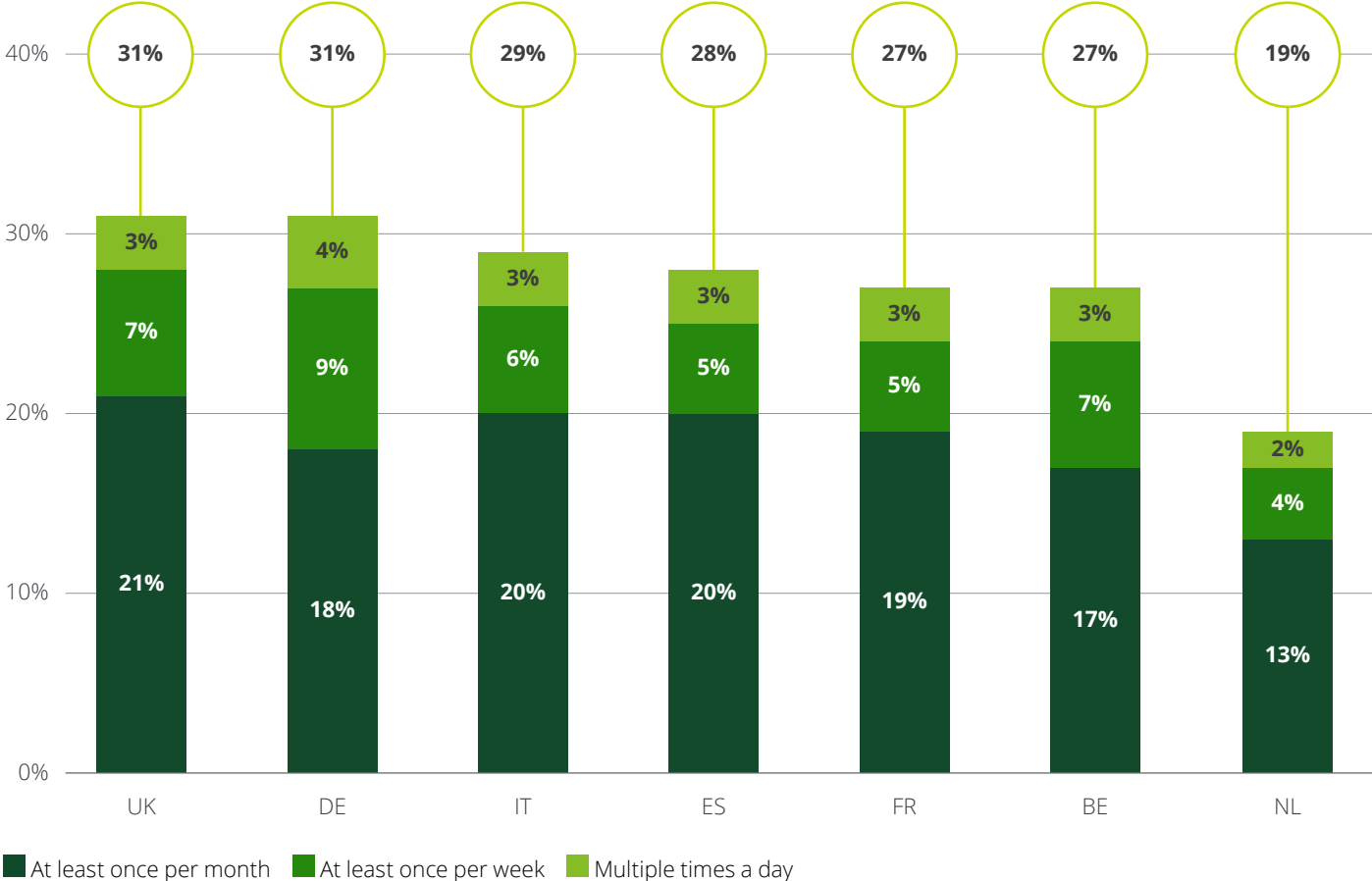
Fig. 7 – How satisfied are you with your mobile network provider for voice and data services via smartphone?



Problems with mobile connections are also common in Western Europe.

A considerable proportion of respondents in Western Europe have problems with their mobile connection at least once a month. Comparing countries, the significantly higher reliability in the Netherlands is striking.

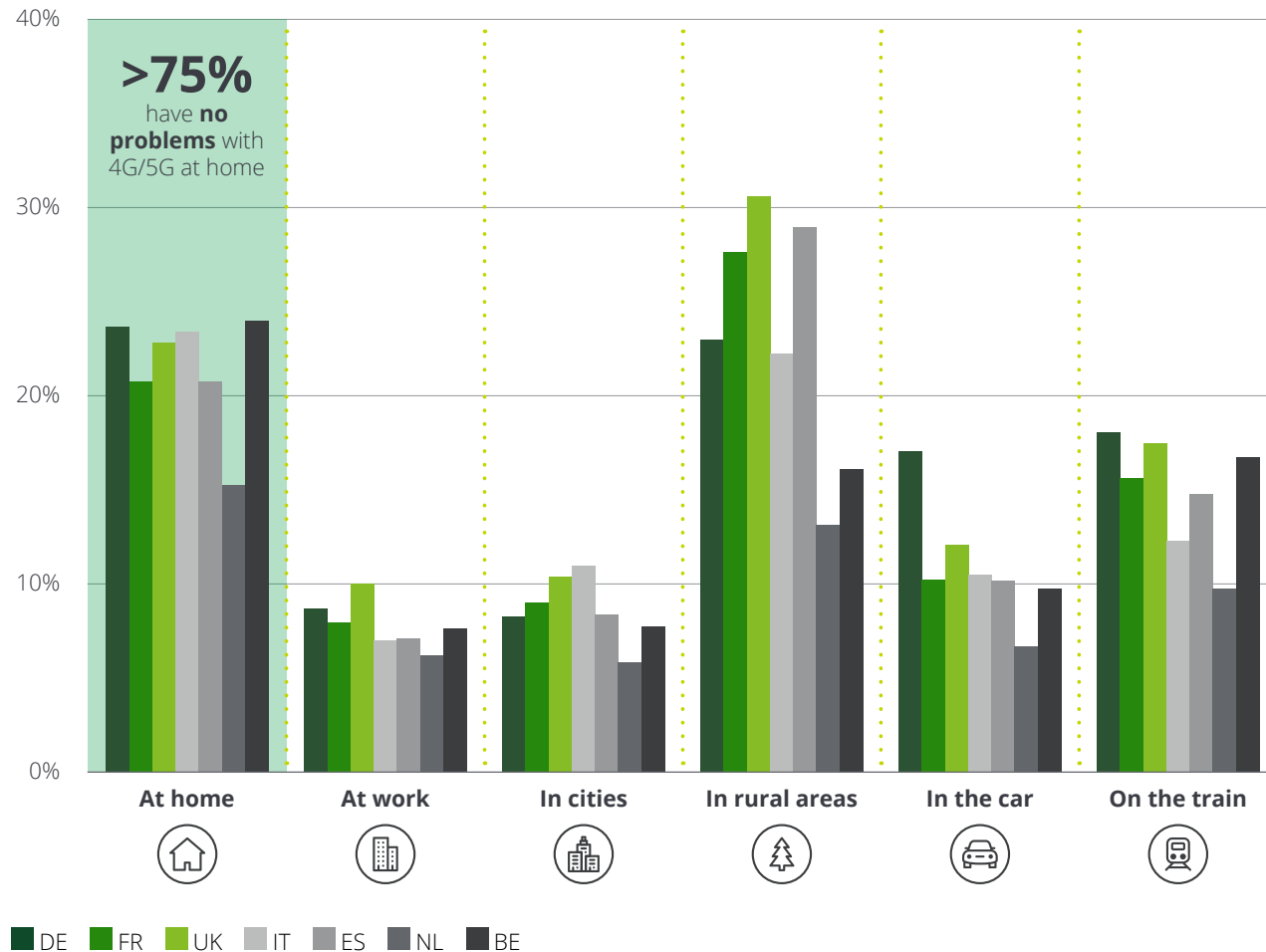
Fig. 8 - How often have you had problems with your mobile connection in the last year?



Mobile internet disruptions not only pop up on the move and in rural areas, but also at home.

In countries with a large area, such as France, Spain, UK, and Germany, connection problems in rural regions are more common. Problems at home open potential for a greater use of range extenders. On the other hand, well over three quarters have no problem with mobile home internet, which underlines the potential of FWA.

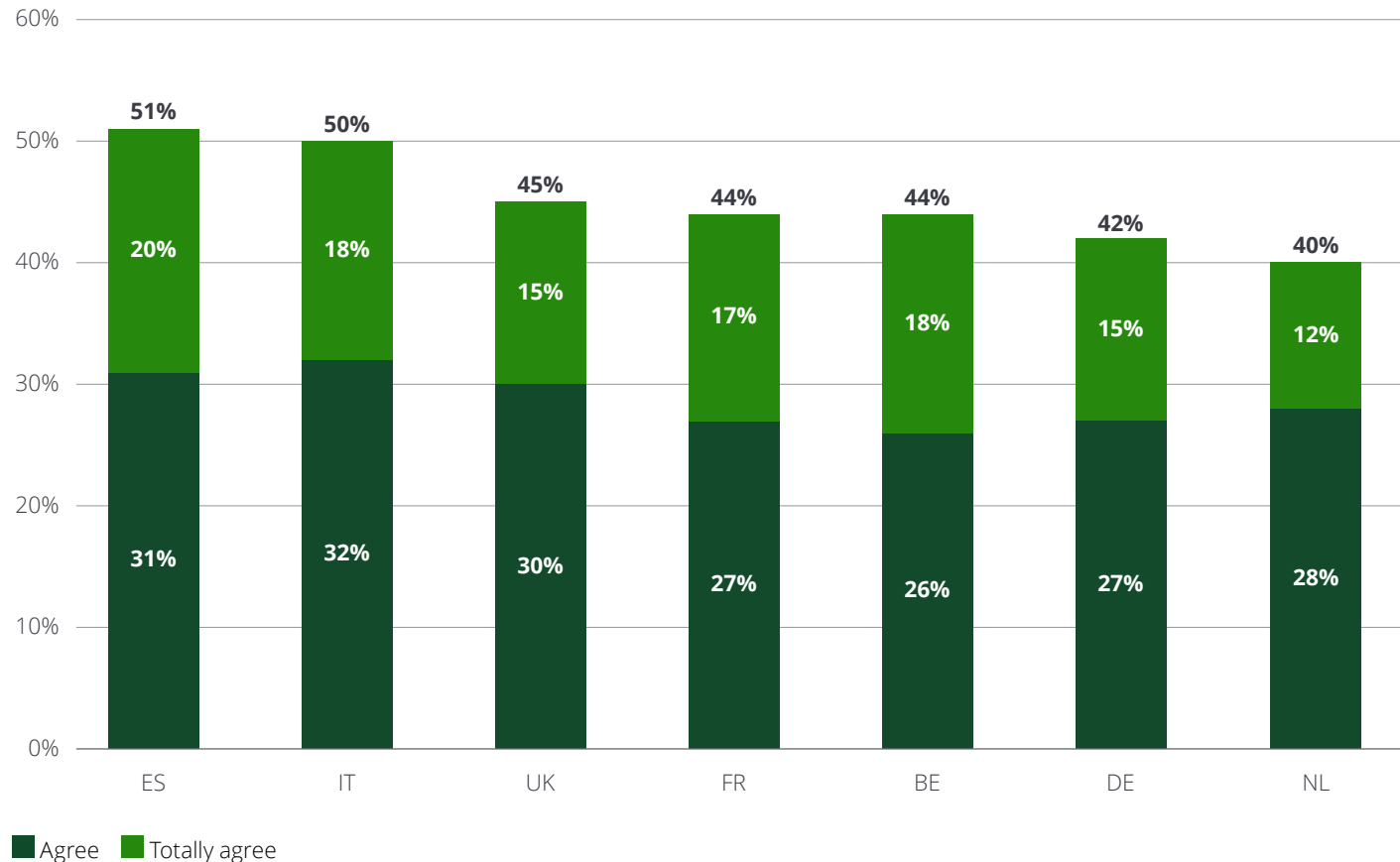
Fig. 9 – Where have you experienced problems with your current mobile connection?



Many consumers are open to using a mobile-based internet connection instead of a landline.

In all countries surveyed, interest in fixed wireless access is considerable. Almost half of all respondents can imagine doing without a wired connection. This openness is particularly high in southern Europe.

Fig. 10 – Agreed* with the statement: “I would be willing to replace my existing fixed broadband connection with a FWA connection, provided it offers the speed and reliability I need.”

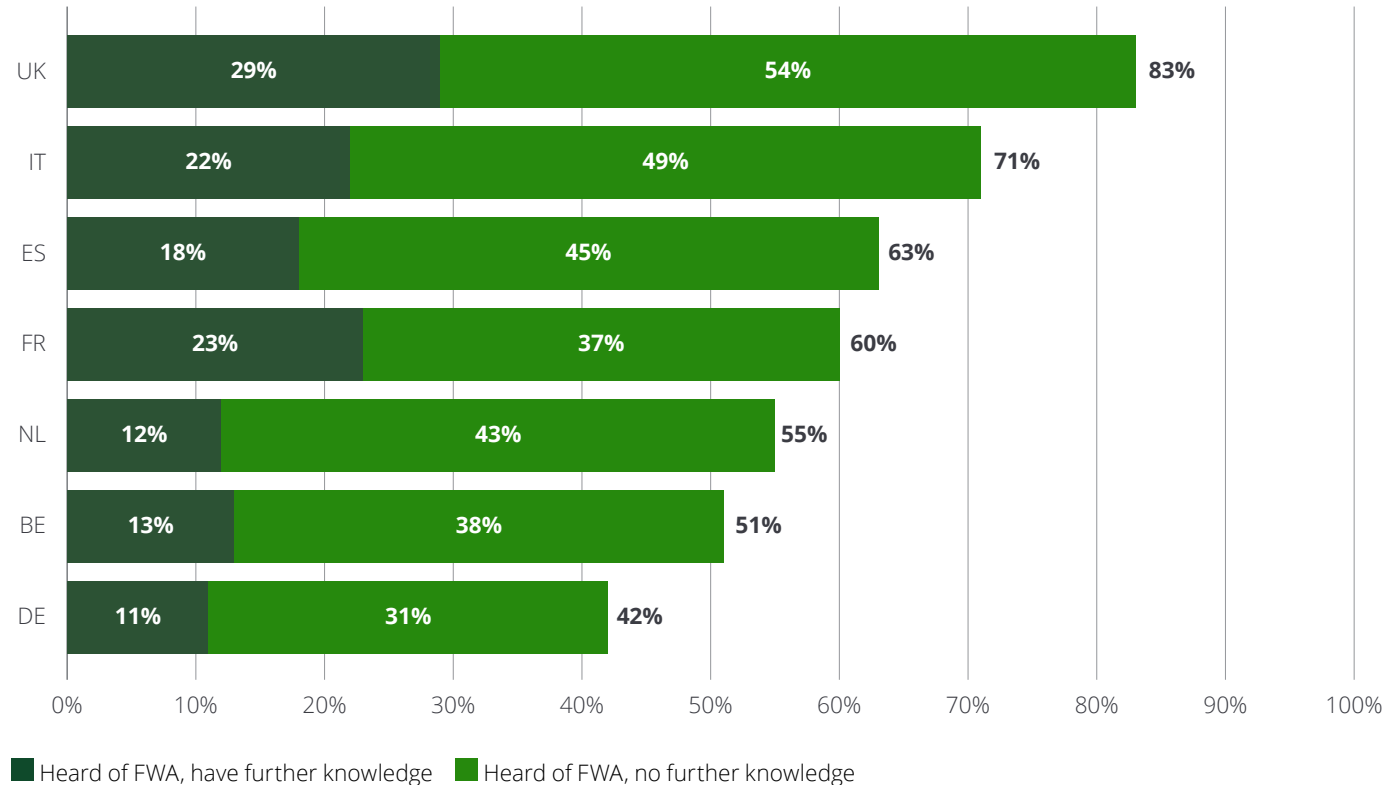


*) sum of “completely agree” and “agree”

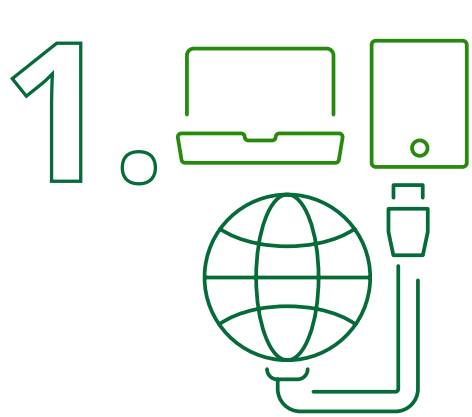
Awareness of fixed wireless access still varies considerably across Western European countries.

Fixed wireless access (FWA) services enable internet at home via mobile (4G and 5G) networks. In the UK and Italy, a large proportion of respondents have already heard of these services, while in Germany awareness is not even half as high. There is a need for further clarification everywhere, e.g., to spread knowledge about potential, providers, and tariffs.

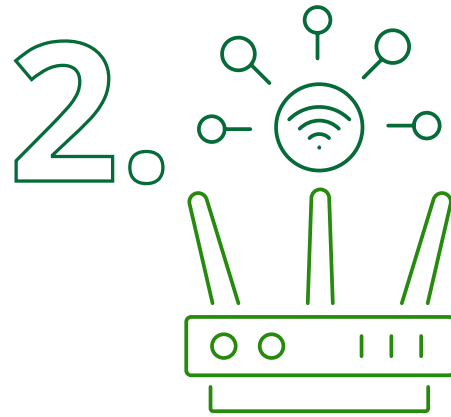
Fig. 11 – Which statement regarding fixed wireless access (4G/5G broadband) applies to you?



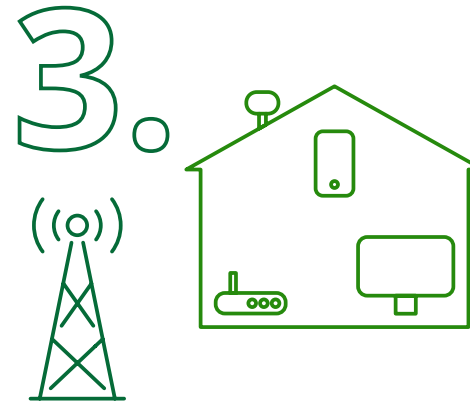
Four broadband fields of action 2024



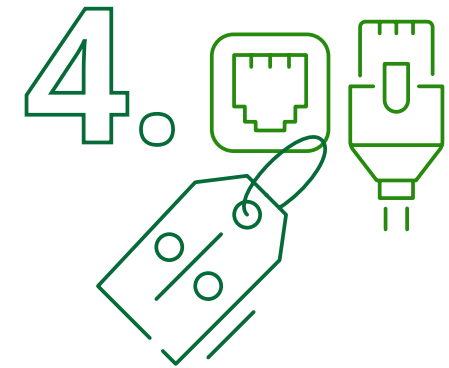
Fix the basics: ensure stability on both fixed and mobile network infrastructures.



Actively push in-home solutions, such as premium modems and range extenders.



Don't miss the FWA opportunity in your market: customers are interested.



Keep in mind that price continues to be a major factor.

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