US vs. EU Broadband Trends 2012–2020
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# KEY FINDINGS

The US continues to handily lead the EU on three critical connectivity metrics: consumer broadband infrastructure deployment, broadband adoption and facilities-based competition.

- **Deployment**: US leads by 11 percentage points ≥30 Mbps; +25 pp ≥100 Mbps
- **Adoption**: US leads by 10 pp ≥25 Mbps; +21 pp ≥100 Mbps
- **Competition**: US benefits from nearly twice the fixed facilities-based competition of the EU overall; when comparing rural areas, the US lead extends to 7x.

### NEW IN 2020: US rural deployment now leads overall EU broadband deployment, despite the added costs and challenges associated with rural deployment

- **Deployment ≥30 Mbps**: US rural at 91%; EU overall at 87%; EU rural at 60%
- **The US infrastructure advantage is most significant when comparing rural areas**, despite the EU definition of “rural” including more population-dense areas (which allows costs to be spread across a much larger customer base).

### NEW IN 2020: US extends its lead in consumer broadband adoption at any speed, and a majority of Americans now have subscriptions ≥ 100 Mbps.

- **US consumer broadband adoption lead grows by 6 pp YOY**
- **Both US and EU see healthy growth in ≥100 Mbps subscriptions**
  - 55% of connected US households and 34% in EU had ≥100 Mbps subs in 2020.
  - YOY increases of 7 pp and 6 pp, respectively

**US lead on consumer adoption likely fueled by US broadband affordability.** US broadband prices are holding steady—and even declining for millions of Americans—despite rising costs for most other essential goods and services.

**US benefits from a 3:1 advantage in per household broadband capex.** This can be attributed to a US policy framework that encourages investment in facilities-based competition rather than heavy government regulation of services.
HOUSEHOLDS COVERED WITH FIXED BROADBAND AT ANY SPEED
US & EU in All Areas and Rural Only

KEY TAKEAWAYS
The US leads the EU in fixed broadband coverage at any speed.
Rural coverage in the US now rivals all EU coverage—despite the fact that rural areas are more costly to serve.
The US rural edge is substantial, despite the more restrictive US definition of rural.

Any Speed is any fixed broadband speed > 200 Kbps.

The EU defines rural areas as ≤ 263 people per square mile. In contrast US rural areas on average only 17.4 people per square mile.
A majority (57%) of the EU’s rural blocks would be considered non-rural in the US.

SOURCES: FCC, NTIA AND EC’S DESI DATA
HOUSEHOLDS COVERED WITH FIXED BROADBAND AT HIGH SPEED
US & EU in All Areas and Rural Only

**KEY TAKEAWAYS**

- The US deployment lead grows when considering only high-speed offerings.
- US rural high-speed coverage now exceeds all EU high-speed coverage.
- US lead in 2020:
  - 11 percentage points in *all* areas
  - 31 pp in *rural* areas

**SOURCES:** FCC, NTIA and EC’s DESI DATA

US speeds: ≥ 25/3 (2012-14) and 30 Mbps (2015-2020); EU speeds: ≥ 30 Mbps down and any speed up (known as Next Generation Access).
HOUSEHOLDS COVERED WITH FIXED BROADBAND 
≥100 MBPS
US & EU in All Areas

KEY TAKEAWAYS
- The higher the speed, the more the US pulls ahead in terms of the broadband services available to consumers.
- The US lead extends to 25 pp for ≥100 Mbps in 2019 (most recent available EU data).
- US coverage continues to grow in 2020.

Sources: FCC, NTIA and EC's DESI data
HOUSEHOLDS WITH TWO OR MORE
FACILITIES-BASED COMPETING PROVIDERS
US & EU in All Areas and Rural Only

KEY TAKEAWAYS
There is over 2x more facilities-based competition in the US than in the EU.
The US lead grows to more than 7X when comparing rural areas.
Indeed, US rural areas benefit from nearly twice as much facilities-based competition as all EU areas.

SOURCES: FCC, NTIA AND EC’S DESI DATA

US: Two or more fixed providers—any technology, including fixed wireless. | EU: A cable and traditional telecom provider.
HOUSEHOLDS WITH TWO OR MORE
WIRED FACILITIES-BASED COMPETING PROVIDERS
US & EU in All Areas and Rural Only

KEY TAKEAWAYS
Even if wireless ISPs (WISPs) are removed from the comparison, the US lead on facilities-based competition remains nearly 2X the EU in all areas.

Even with this more conservative tally, the US lead remains greater than 5X when comparing rural areas.

SOURCES: FCC, NTIA AND EC’S DESI DATA
SHARE OF HOUSEHOLDS WITH FIXED BROADBAND SUBSCRIPTION AT ANY SPEED

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<tr>
<td>2020</td>
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SOURCES: FCC, NTIA AND EC'S DESI DATA

KEY TAKEAWAYS
Not only do more Americans have access to high-speed broadband, but significantly more Americans have adopted service in their homes—with US take-up rates 15 percentage points ahead of EU rates.
US VS. EU BROADBAND ADOPTION :: TAKE-UP

KEY TAKEAWAYS
US residential take-up of high-speed broadband service is 10 percentage points greater than the EU.

SHARE OF HOUSEHOLDS WITH FIXED BROADBAND SUBSCRIPTION AT HIGH SPEED

SOURCES: FCC, NTIA AND EC’S DESI DATA
EU speeds: ≥ 30 Mbps. US speeds: ≥ 25/3
SHARE OF HOUSEHOLDS WITH FIXED BROADBAND SUBSCRIPTION AT ≥ 100 MBPS

[Graph showing broadband adoption rates for EU and US from 2012 to 2020]

KEY TAKEAWAYS
At the fastest speeds, the US has a 21 percentage point lead over the EU on broadband take-up among consumers.

SOURCES: FCC, NTIA AND EC’S DESI DATA
SHARE OF HOUSEHOLDS WITH BROADBAND SUBSCRIPTIONS AT 3 SPEED INTERVALS

- <25 MBPS
- ≥25 MBPS & <100 MBPS
- ≥100 MBPS

**KEY TAKEAWAYS**

More American consumers are adopting broadband overall, and far more are choosing the highest speed service offerings relative to EU consumers.

**SOURCES:** FCC, NTIA AND EC’S DESI DATA
WHY IS THE US AHEAD?

TELECOM INFRASTRUCTURE INVESTMENT 2012 – 2018

Denominated in 2018 US dollars. All figures are 2012-2018 CUM. Investment figures include residential, business and mobile services.

**KEY TAKEAWAYS**

Broadband companies invest far more in the US as a whole...

**US +75%**
(CUM)

...Despite a far smaller customer base

**US -43%**
(# of households vs. EU)

...investing far more per household

**US +208%**
(CUM)

...every year

**US +$478 household**
(Avg Annual Investment)