



Pwyllgor Newid Hinsawdd, yr Amgylchedd a Seilwaith /
Climate Change, Environment and Infrastructure Committee
Cysylltedd digidol yng Nghymru / Digital connectivity in Wales
DC07
Ymateb gan / Evidence from Which?

Climate Change, Environment, and Infrastructure Committee
Welsh Parliament
Cardiff Bay
Cardiff
CF99 1SN

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BY EMAIL

Our ref: TM/SB/LH

Dear Committee Clerks and Members,

Following discussion with the Clerking team and some of those due to give evidence to the Committee's one-off meeting on Digital Infrastructure on 11 May 2022, please find attached some briefing material which I hope will prove helpful to your inquiry.

As you may know, Which? is the UK's consumer champion. As an organisation we are not for profit - a powerful force for good, here to make life simpler, fairer and safer for everyone. We're the independent consumer voice that provides impartial advice, investigates, holds businesses to account and works with policymakers to make change happen.

Earlier this year we published the 2022 Consumer Insights report for Wales, which I attach in both English and Welsh. This report, based on survey responses from over 1000 consumers in Wales, includes a dedicated section (pp18-22) on Digital Life and Broadband Connectivity.

For further context, I have also provided a copy of the Gigabit Take-up Advisory Group's (GigaTAG) report published in June 2021. The UK Government asked Which?, the Confederation of British Industry (CBI) and Federation of Small Businesses (FSB) to convene the group in August 2020 to develop a set of recommendations to help support consumer and business migration to gigabit-capable networks and the services they deliver as soon as possible.

I wish you well for the session and short inquiry and if there is anything further we can provide to support your work in this area please do not hesitate to contact me. Which? is also actively engaging in a number of other policy areas the Committee is to consider over the coming months, including the consumer implications of the transition to more sustainable and energy efficient homes and electric vehicle charging infrastructure. We look forward to supporting the Committee's work in future.

Yours sincerely,
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Digital Life and Broadband Connectivity in Wales

For millions of households and businesses, the pandemic has demonstrated the value of a fast and reliable broadband connection. Year on year, more of our lives are conducted online and the pandemic hastened the speed at which we've adopted online behaviours. 68% of consumers across the UK increased their broadband use between March 2020 and March 2021.

It is clear that consumers in Wales rely on their home broadband for various essential tasks, and this reliance is likely to increase further in the future, with more and more broadband-connected devices becoming a part of households across the nation and more services including banking and healthcare appointments moving online. As such, **it is increasingly crucial that consumers have access to good broadband**, with sufficient bandwidth and speed to complete this broad range of activities.

Which? has analysed Ofcom data to reveal performance within the devolved nations. Our analysis (available in [English](#) and [Welsh](#)) shows that:

- **Despite improved broadband performance across the UK, average broadband speeds in Wales are still much slower than in the other nations.** The average fixed broadband download speed is just 55.9 megabits per second (Mbps) in Wales, compared with 88.5 in England, 82.7 in Northern Ireland and 73.7 in Scotland.
- There are also **stark differences between the largest urban areas and the rest of the country.** On average, the download line speeds in Cardiff and Swansea are more than twice as fast as those in the northern and central regions of Wales.
- About 90% of people are using the internet for shopping, managing their banking and utilities, and communicating with friends and family.
- Connected devices are also becoming widespread. Roughly two thirds of households have a smart TV, more than a third a smart speaker, and about one in ten a smart doorbell.

Differences in performance represent both differences in capability and in household demand for faster broadband and so **these disparities demonstrate the need to both improve infrastructure and tackle barriers to consumer adoption** of better broadband.

The UK Government has [committed to](#) enhance digital connectivity so that gigabit-capable broadband with download speeds of at least 1,000 mbps will be available UK-wide by 2030. It is also forecasting that at least 70% of premises in Wales will be covered by gigabit-capable broadband by 2025. This would mean Wales catching up with some other parts of the UK, but it would **still lag well behind London and Northern Ireland** for which the forecast rate is at least 90% of premises.

Which? worked with the CBI and FSB to convene the Gigabit Take-up Advisory Group (GigaTAG). [Reporting in 2021](#), it set out the three main barriers to adoption of broadband of gigabit-capable connections which apply across the UK: lack of **awareness**; limited perceived **benefit**; and practical **barriers** to adoption such as restricted opportunities to switch and affordability for some groups.

Recommendations

GigaTAG's report recommends a series of actions, including:

- Ofcom and industry should work together on clear and common terminology to cut through advertising jargon and describe gigabit broadband and its benefits in straightforward terms.
- Ofcom should assess the role that a "gigabit-ready" labelling scheme - similar to the BSI KiteMark - could play in increasing understanding of gigabit-capable broadband.
- Local authorities should to raise awareness and promote the benefits of upgrading at a local level, supported by the provision of a 'gigabit toolkit'.
- At the right time, governments should also undertake nationwide awareness-raising - leading a coalition of stakeholders to work together on a national campaign.
- In addition to ongoing work to introduce voluntary social tariffs, governments should conduct an evidence-base assessment of existing and potential measures to support low-income households, including exploring the possibility of a targeted voucher scheme.
- Further consideration should be given to an employer-led scheme to support uptake of gigabit broadband by offering employee discounts, similar to gym membership discount schemes offered by many businesses. This will also directly benefit people's ability to work from home.

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