Agenda Supplement – Climate Change, Environment, and Infrastructure Committee

Meeting Venue:	For further information contact:
Hybrid: Committee room 4 and Video Conference via Zoom	**Marc Wyn Jones**
	Committee Clerk
Meeting date: 11 May 2022	0300 200 6565
Meeting time: 09.30	SeneddClimate@senedd.wales

Hybrid - Draft report (item 8) and written evidence – digital connectivity

Please note the documents below are in addition to those published in the main Agenda and Reports pack for this Meeting

Senedd Cymru
Welsh Parliament

8   Provisional Common Frameworks for Air Quality, and Chemicals and Pesticides – consideration of the Committee's draft report

Attached Documents:

Draft report

Pwyllgor Newid Hinsawdd, yr Amgylchedd a Seilwaith / Climate Change, Environment and Infrastructure Committee
Cysylltedd digidol yng Nghymru / Digital connectivity in Wales
DC06
Ymateb gan Panel Defnyddwyr Cyfathrebiadau / Evidence from Communications Consumer Panel

Written evidence for the Climate Change, Environment and Infrastructure Committee

1. **The Communications Consumer Panel and Advisory Committee for Older and Disabled People**
   - The Panel was established under the Communications Act 2003, to provide a voice for consumers, citizens and micro-businesses across the UK, with a particular focus on consumers who may traditionally be less heard in policy-making.
   - The communications market is complex, highly technical and fast-moving - and impacts across society and the economy. As a result, the Panel and ACOD's work is diverse and broad, covering not just telecommunications such as broadband, spectrum (mobile and TV airwaves) and mobile, but also post, broadcasting and issues such as digital inclusion.
   - Our sector specialism and expert experience and understanding allow us to robustly challenge telecoms policy development from a position of strength, supported by sound evidence and resulting in pragmatic actions based on real world solutions.
   - The Panel works to influence before, during and after policy development – through a variety of methods and channels.
   - We consult publicly on our strategic plans. Our reports can be found on our website.[1]

2. **The Panel's work to support consumers in Wales**
   - The Panel commissions research among UK consumers each year. We ensure that agencies offer consumers the opportunity to be interviewed in Welsh and ask agencies to ensure that they seek input from consumers living in different parts of Wales.
   - The Panel has a Member for Wales (Sian Phipps), who also attends Ofcom's Advisory Committee for Wales, as an observer, ensuring that learnings from the Advisory Committee sessions are fed to the Panel, so that all Panel Members are aware of issues affecting consumers in Wales.
   - The Panel's Member for Wales chairs quarterly 'Consumer Stakeholder Hubs'[2], enabling charities and consumer organisations representing consumers in Wales to share with the Panel and each other issues affecting Welsh consumers. We publish a summary of the issues raised in those sessions and submit key issues to policy-makers and industry.
   - Our Member for Wales provides a Welsh 'voice' in the Panel's monthly meetings, when the Panel is able to input into Ofcom's policy development at an early stage, meaning that Welsh consumers are represented early on in Ofcom's thinking.
   - The Panel's Chair, Rick Hill MBE, chairs a quarterly 'Consumer Advocacy Hub', with participants from across the UK, including Citizens Advice for England and Wales, Citizens Advice Scotland

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[1] Strategic plans and Annual Reports - Communications Consumer Panel
[2] What the Panel does - Communications Consumer Panel

and the Consumer Council for Northern Ireland. This enables the Panel to hear about research and consumer concerns in each nation and to join together with consumer advocates to represent UK consumers.

- The Panel's Chair also attends regular meetings of the Broadband Stakeholder Group, a forum for broadband suppliers to UK consumers. He is able to provide a voice for consumers across the UK in those sessions.
- The Panel's Chair has regular meetings with communications providers and raises concerns of specific groups of consumers, including those highlighted by the Panel's Member for Wales, in those meetings. He also recommends a proactive approach in urging providers to have accessible complaints processes and learn from issues impacting groups of consumers across the UK. He encourages providers to employ accessible user testing to ensure that they are incorporating the needs of all consumers in the design of their processes.

3. **The Panel's recent research**
- In 2020 and 2021, the Panel published qualitative and quantitative research on various issues that we knew were affecting consumers across the UK,[3] including connectivity during the pandemic and connectivity in care homes.
- Our research has shown that consumers rely on communications services as **essential services** and to lack decent access to communications services has practical and emotional impacts, leaving people unable to perform daily tasks or connect with work, loved ones and hobbies.
- Our research has also shown that some consumers are still being 'left behind' in terms of not only access to infrastructure, but a lack of confidence and skills to contact their provider. The communications market is complex and confusing and the language used by providers leaves consumers in a position where they feel they are unable to challenge their provider; have low levels of awareness of big changes in technology, such as 'Migration to VOIP'; and are ill-equipped to find the best deal on the market.
- Our research has revealed that for consumers in more vulnerable situations (for example, people living in a low-income household; living in a remote rural location; living with a disability, or a mental or physical health condition which means they have additional support requirements; or who have low English literacy or digital literacy) barriers to access and use of communications services are greater.
- This detriment is further compounded by the fact that these groups of people may be more reliant than others on communications services, to stay informed of medical appointments, stay connected to loved ones, pursue hobbies at low cost, apply for jobs and run a business.
- We believe that everyone in the UK who wishes to have reliable, resilient, affordable digital connectivity should have it – including access to easy redress if something goes wrong.
- We believe consumer awareness of the availability and cost of connectivity options across the UK is low and often excludes people who are not online and those who are less able to engage with complex technological jargon. We therefore recommend that informative communications with consumers, by providers, Ofcom and UK and Welsh Government should be in plain language, in English and Welsh, so that it is accessible to all UK consumers. This would enable consumers to understand whether faster broadband options would be worthwhile to their circumstances and budget.
- Following our research with low income households and people targeted by scams, we highlight the financial and emotional impact on consumers on not being empowered to navigate the communications market in a safe and informed way.
- With the above low consumer awareness and confidence in mind, **we have strongly recommended to UK Government, Ofcom and communications providers that there is:
  - a widescale consumer communications campaign on 'Migration to VOIP' across all parts of the UK – taking into account the needs of consumers locally;**

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[3] Research and reports - Communications Consumer Panel

- greater awareness-raising on social and low-cost tariffs, with consumers automatically being switched to a lower cost tariff where applicable; and
- clear communication to all consumers on the types of support that providers can offer to people who may find it more difficult to represent themselves in the communication market, or who have additional support needs.

Which?

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

6 May 2022

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,
Tim Mouncer
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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.

May 2022

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Agenda Item 8

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