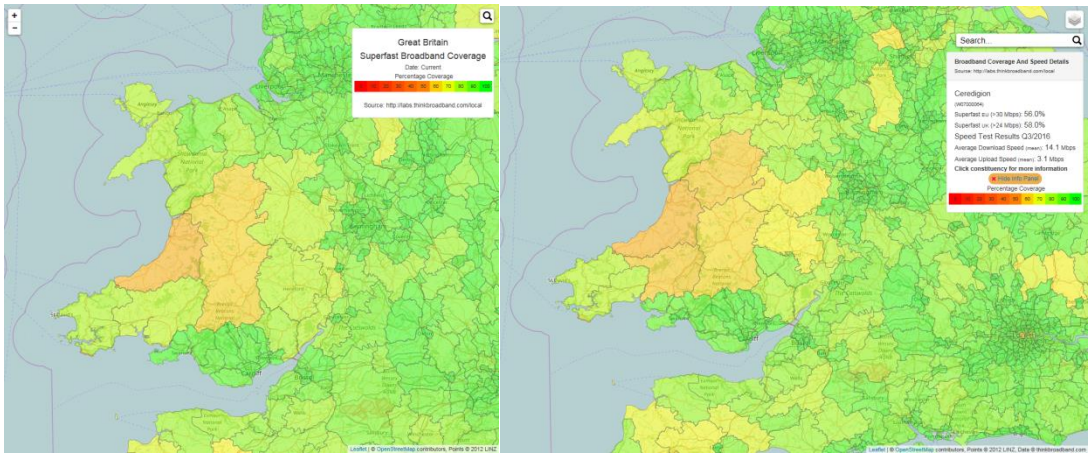
Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee
Seilwaith digidol Cymru/ Digital Infrastructure in Wales
Ymateb gan thinkbroadband / Evidence from thinkbroadband

The data contained in this document was sourced in the period of 28th November to 8th December 2016 and as the roll-outs are still underway there will have been further roll-out. Generally this means a change nationally of 0.4% each month, the latest data is always available at https://labs.thinkbroadband.com/local/wales

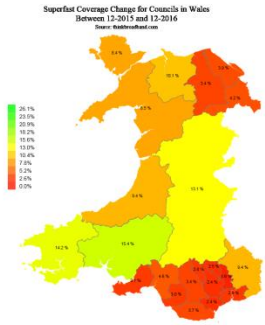
The tracking of availability is based on all the fixed line providers, which generally comprises Openreach, Virgin Media and Hyperoptic in Wales. In addition to the availability we also match a number of years of observed speed test results from the public against the various areas of Wales.

This means we can give insight into coverage, the speeds people receive from the faster services and an estimate of take-up.

The two main views of Wales are the degrees of superfast coverage by local authority and Westminster constituency. The constituency level view with relatively uniform population size also help to give some idea of the areas of high population density.

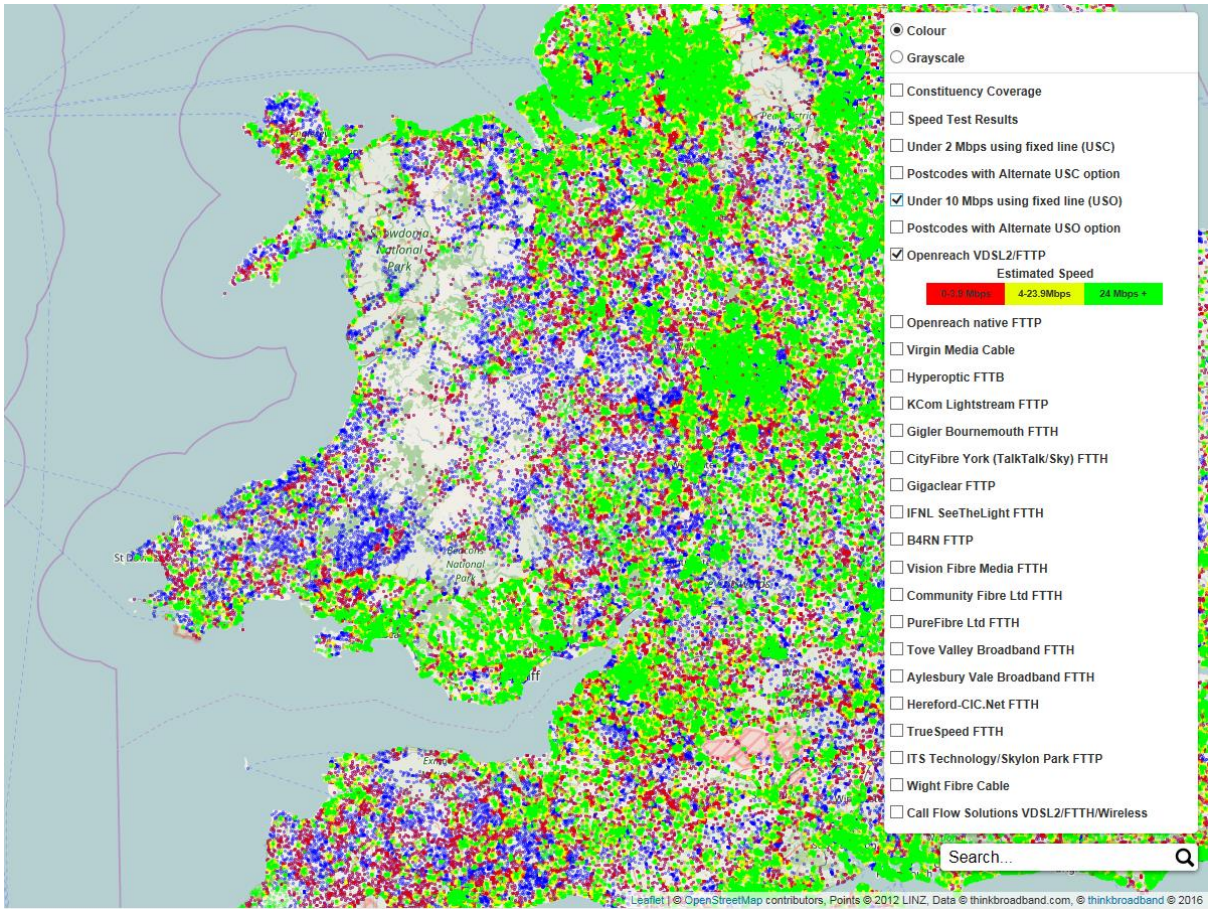


Mid and West Wales are the two areas lagging, but these are also the areas where superfast coverage was low or non-existent a few years ago.



This simpler map highlights the levels of change in the last 12 months across Wales and is useful to highlight that the roll-outs while not uniform across the areas of Wales is targeting the areas where coverage was lowest.

One issue we have learnt is that people sometimes miss construe the uniform colouring of the council and constituency areas, for example with some areas if you a service is delivered to the two major towns of an area you find people in the rural areas dispute the coverage levels. Therefore it is often proven better to show a dot per postcode format such as:



The combined analysis of where superfast broadband is available and speed tests demonstrating people have taken up the service shows an observed take-up of 32%.

In table form coverage as of 7th December for Welsh Parliamentary constituencies with speed test results from Q3/2016 and the Q4 results should

be available the first week of January. The rank is based on the full 650 UK set of constituencies.

Rank (Based on	Constituency	More Detail	Superfast (Over	Superfast (Over 30 Mbps -	Observed Average Download	Observed Average Upload
39	Rhondda	W07000052	99.1%	98.1%	18.6	4.2
55	Cardiff West	W07000079	98.9%	98.8%	31.3	4.7
108	Blaenau Gwent	W07000072	98.4%	97.8%	17.7	3.9
116	Swansea East	W07000048	98.3%	98.2%	29.3	5.1
174	Swansea West	W07000047	97.7%	97.5%	31.0	4.7
197	Cardiff South and Penarth	W07000080	97.3%	97.2%	29.1	5.0
208	Cardiff North	W07000051	97.2%	96.4%	27.4	4.9
223	Pontypridd	W07000075	96.8%	96.0%	20.1	4.5
237	Merthyr Tydfil and Rhymney	W07000071	96.6%	95.3%	18.1	3.9
246	Cynon Valley	W07000070	96.5%	95.4%	18.0	4.1
250	Cardiff Central	W07000050	96.4%	96.1%	28.8	4.5
251	Islwyn	W07000077	96.4%	94.6%	18.7	4.2
262	Caerphilly	W07000076	96.2%	94.6%	18.8	4.1
268	Torfaen	W07000053	96.1%	94.8%	20.9	4.1
278	Newport West	W07000056	95.9%	95.5%	27.8	4.8
291	Aberavon	W07000049	95.9%	95.2%	31.2	4.9
295	Newport East	W07000055	95.8%	95.5%	24.7	4.3
317	Bridgend	W07000073	95.5%	94.6%	19.5	4.6
338	Alyn and Deeside	W07000043	95.1%	94.1%	18.5	3.9
369	Wrexham	W07000044	94.2%	93.4%	17.0	3.7
381	Ogmore	W07000074	93.9%	90.9%	16.5	3.6
405	Llanelli	W07000045	93.1%	91.7%	16.5	3.7

Rank (Based on	Constituency	More Detail	Superfast (Over	Superfast (Over 30 Mbps -	Observed Average Download	Observed Average Upload
411	Neath	W07000069	93.1%	92.0%	23.5	3.9
439	Vale of Clwyd	W07000060	91.9%	90.9%	18.2	3.8
451	Vale of Glamorgan	W07000078	91.3%	90.6%	24.4	4.0
453	Gower	W07000046	91.1%	90.3%	22.2	4.0
520	Aberconwy	W07000058	86.6%	85.1%	15.9	3.5
522	Arfon	W07000057	86.5%	84.1%	16.6	3.6
545	Delyn	W07000042	84.4%	82.6%	17.7	3.6
575	Clwyd West	W07000059	81.2%	80.2%	15.1	3.3
587	Ynys Mon	W07000041	79.7%	78.0%	16.6	3.5
590	Monmouth	W07000054	79.6%	77.9%	15.8	3.5
597	Preseli Pembrokeshire	W07000065	78.6%	76.7%	16.3	3.4
598	Carmarthen West and South Pembrokeshire	W07000066	78.4%	76.9%	15.9	3.5
609	Clwyd South	W07000062	76.5%	74.3%	14.8	3.2
616	Dwyfor Meirionnydd	W07000061	74.0%	72.1%	16.8	3.6
636	Brecon and Radnorshire	W07000068	63.5%	62.1%	12.5	2.5
637	Carmarthen East and Dinefwr	W07000067	62.5%	59.8%	11.8	2.7
638	Montgomeryshire	W07000063	62.1%	60.5%	12.6	2.5
646	Ceredigion	W07000064	58.1%	56.1%	14.1	3.1

One very important aspect of the SuperfastCymru roll-out is the availability of fibre to the premises this is running at 1.4% currently and rises to 1.56% once you factor in the presence of Hyperoptic. We are aware of a large amount of Openreach FTTP that is in the build stages, and this is likely to be in the order of another 2-3% which based on our analysis would put Wales well past the 90% superfast mark, and ensure the original goal of 96% fibre based broadband availability was met.

The biggest challenge appears to be convincing people that the project is delivering, and as those who are still to benefit are becoming increasingly vocal ensuring clear communication as to when they will see an improvement is important.

Additionally there are many who may be confused e.g. the talk is all about superfast broadband, but there are plenty who would benefit from upgrading from slow ADSL services to VDSL2 even when it can only deliver 10 to 15 Mbps.