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**Which? response to the Department for Digital, Culture, Media and Sport call for evidence on Improving Connectivity in Very Hard to Reach premises.**

## Summary

Consumers across the UK must have access to good quality connectivity - people's lives are becoming more and more reliant on being connected to perform everyday tasks. However, consumers in very hard to reach areas can often experience difficulty in accessing better connections. This leaves them unable to take advantage of the benefits improved connectivity brings.

Consumer demand plays an important role in the rollout of new broadband infrastructure. However, consumers in hard to reach areas often lack valid alternatives and would switch to a better service if they were given the opportunity to do so. The benefits of and the need for these better connections will only increase as more services move online and people are increasingly reliant on good quality connectivity.

While there are barriers to rolling out connectivity infrastructure in very hard to reach areas, consumers can also face their own barriers to adoption. Lack of trust in the broadband market or concerns about cost may be barriers for some consumers.

However, there are options for providing connectivity in very hard to reach areas and a range of approaches are likely to be required, depending on why an area is hard to reach. Different approaches have different pros and cons, however it is critical that consumers are able to access a connection which provides them with the level of connectivity they require to fully partake in an increasingly digital world.

## General Comments

As more services move online the need for good quality connectivity is becoming increasingly important. This has been further highlighted by the pandemic which meant people were highly dependent on their broadband connections - for work, shopping and keeping in touch with family and friends.

Given that gigabit-capable broadband is being rolled out across the UK, it is critical that very hard to reach areas are not left behind and are able to experience the benefits of connectivity improvements.

Which? has welcomed the range of measures that have been put in place to improve connectivity in the UK, particularly in those areas which are poorly served. The broadband Universal Service Obligation (USO) and Shared Rural Network (SRN) are key measures which could make a significant difference to the availability of connectivity in rural and harder to reach areas.

Which? also recognises the commitment Government has made to the rollout of gigabit-capable broadband in hard to reach areas, allocating £5 billion of funding to achieve

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this.[1] However, it is notable that this estimate excludes the cost for reaching the final 1% as it is likely to be prohibitively expensive to deliver gigabit-capable networks in these locations. However, it is critical that very hard to reach areas are not left behind as part of improvements to the UK's broadband infrastructure - particularly given the increasingly online world in which we live. Which? is glad that the government is exploring alternative solutions for these areas and seeking stakeholder views on this important issue[2].

**Demand**

Consumer demand plays an important role in the rollout of new gigabit infrastructures - ensuring that providers can make a return on their investment and that consumers experience the benefits of these connections. Recognising the importance of demand, Which? was asked by the government to chair the Gigabit Take-up Advisory Group (GigaTAG), along with the CBI and FSB[3].

Consumers in hard to reach areas are often in a situation where they have limited choice in terms of providers and in some circumstances they have no choice at all. According to Ofcom around 189,000 premises in the UK are unable to receive a decent broadband service (10 Mbit/s download and 1 Mbit/s upload speed) from either a fixed or wireless connection[4] and around 43,000 cannot access either broadband or good mobile services indoors[5]. Broadband speed is generally slower in rural areas, with 19% of all connections being below 10 Mbit/s compared with 10% in urban areas[6].

This struggle is highlighted by consumer experience and satisfaction with their connection, where rural and remote areas register the most problems[7]. Overall, in Great Britain, almost 1 in 5 rural residents (19%) consider internet access to either be 'bad' or 'very bad' compared to 1 in 10 (10%) of people living in other location types[8]. Concerns over quality of services

[1]Digital, Culture, Media and Sport Committee "Fourth Report - Broadband and the road to 5G" 2020 https://committees.parliament.uk/publications/4109/documents/40723/default/
[2] Digital, Culture, Media and Sport Committee "Fourth Report - Broadband and the road to 5G" 2020 https://committees.parliament.uk/publications/4109/documents/40723/default/
[3] The GigaTAG's work aims to develop a set of recommendations to help support consumer and business migration to gigabit-capable networks, and the adoption of gigabit-capable services (where consumers and businesses can benefit from them), as soon as possible. This will help to ensure that the economic and social benefits promised by better connections are realised.
[4] Ofcom "Connected Nations Update: Spring 2021", 2021 https://www.ofcom.org.uk/__data/assets/pdf_file/0028/218881/Connected-Nations-Spring-Update-2021.pdf
[5] Ofcom "Connected Nations 2020" 2020. https://www.ofcom.org.uk/__data/assets/pdf_file/0024/209373/connected-nations-2020.pdf

[6] As ADSL and FTTC connection lines tend to be shorter in urban areas than in rural ones, the former one tends to perform better.
Ofcom "UK Home broadband performance" 2021 https://www.ofcom.org.uk/research-and-data/telecoms-research/broadband-research/broadband-speeds/uk-home-broadband-performance-nov-2020
[7] We are aware that, as the call of evidence document sets out, not all very hard to reach will be in rural areas.
[8] Demos, Everyday Places Creating Strong Locations to Support Daily Life in Britain, 2021 https://demos.co.uk/wp-content/uploads/2021/04/Everyday-Places.pdf?utm_source=The+Digest&utm_campaign=25921bb358-The_Digest_22_February_19_COPY_01&utm_medium=email&utm_term=0_1a82d36a80-25921bb358-110242324

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are particularly felt in devolved administrations. Which? research found that consumers in isolated dwellings and hamlets in these areas are experiencing the most problems with their connections. 31% of consumers living in a hamlet and isolated dwelling in Wales reported often experiencing issues with their connectivity, with the figures standing at 37% for Scotland and 32% for Northern Ireland[9].

For consumers with slow broadband speeds, it is reasonable to expect that if faster speed services were available, they would upgrade to them. For many consumers, faster speeds are not a ‘pull’ to engage with the market[10]. However, it is a pull for those facing major service issues, or have an inadequate connection which is impacting their experience of internet-based services. The GigaTAG’s interim report suggested that for those who currently receive poor service due to a lack of fibre-to-the-cabinet options, speed is likely to be a pull, with evidence from the UK supporting this to be true[11]. Similarly, cross country comparisons illustrate that where there are currently only low speed offerings available, speed can be a pull[12].

While access to vouchers, such as the Gigabit Broadband Voucher Scheme, aims to help those in rural areas with slow speeds, costs may still be prohibitive even with this support in very hard to reach areas.

**Benefits**

Without access to good quality, reliable connections, consumers will be unable to benefit from the range of products and services that are available online. As more services, such as banking and healthcare, move online, it is critical that all consumers have access to the connections needed to undertake these activities.

Access to banking is an example of this issue. Which? analysis found that the UK has lost almost two-thirds of its bank branches in the last 30 years, with over 3,300 branches closing across the country since 2015[13]. This has left a fifth of households more than three kilometres from their nearest branch. In addition to branch closures, between January 2018 and January 2020, the number of free-to-use ATMs reduced from 54,500 to 45,000, a 17% reduction. Without access to good connectivity, consumers could face challenges making digital payments and banking online. According to technology services company Olive, 58%

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[9] In comparison the proportion of consumers often experiencing issues in urban areas is 14% for Wales, 12% for Scotland and 10% for Northern Ireland
Yonder on behalf of Which? surveyed at least 1,000 consumers in each of the UK nations from 4th-18th December 2020. Sample weighted to represent each nation according to their known age and gender profiles. Note that sample sizes are small for those living in a hamlet or isolated dwelling (Wales: 83, Scotland: 73, NI: 100).
Question: How often do you experience problems with your broadband service e.g. slow/inconsistent speeds, freezing, buffering, it being unreliable? Often, sometime, rarely, never, dk
[10] Which, 2019, Consumer Engagement with Broadband.
[11] Gigabit Take-up Advisory Group “Interim Report” 2021 https://aaf1a18515da0e792f78-c27fdabe952dfc357fe25ebf5c8897ee.ssl.cf5.rackcdn.com/2249/GigaTAG+Interim+Report.pdf?v=1608208282000
[12] WIK-Consult, 2020, Moving to a fibre-enabled UK: International experiences on barriers to gigabit adoption.
[13] Which?, “Everyday Finances - Key Statistics”, 2019, https://www.which.co.uk/policy/money/4348/everydayfinances

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of people said that they had been unable to access the help or online banking facilities they needed from home since lockdown[14].

Better connections also enable people to work remotely or set up businesses in rural and remote areas. Changes due to the effects of the Covid-19 pandemic, have led to more people working remotely and half of them (50%) expect to continue working from home in the future[15]. This has led more people to consider leaving urban centers and move to rural areas looking for more spaces to live. This could potentially lead to an influx of relatively high-earning workers into rural and coastal areas, supporting economic growth in left-behind communities and regions[16]. According to Openreach, potentially up to 500'000 people could move to rural and remote areas across the country[17]. This will bring economic benefits in more remote areas as well as contributing to reinvigorate local communities. Improving hardest to reach areas connectivity will allow them to benefit from the potential influx of new residents looking for more space and better quality of life. However, this will all depend on whether or not they would be able to access the needed infrastructure necessary to support them.

**Barriers**

As detailed in the previous section, consumers that are struggling with their connection may switch to a better service given the opportunity. However, while this barrier may be overcome there are others that will represent a challenge to consumers. Consumers may not be keen to adopt new connections if they do not understand how improved connectivity can benefit them and why they should pay more. Those barriers often include lack of awareness of the availability of other connections and other practical barriers to adoption, such as 'hassle' related to switching[18].

Once alternative connections are made available to consumers, it is important that they are aware it's available and the benefits it offers. However, research highlighted a general lack of knowledge and trust with the broadband market across consumers in the UK. Respondents had concerns that changing providers may lead to poorer services and unexpected costs. 38% of consumers believed that changing providers is too risky and may lead to a worse

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[14] The data refer to the first lockdown, which started in the UK in March 2020 and finished in June 2020.
Which? Money "The battle to save our bank branches" 2020
[15] Openreach, 2021, "Ultrafast full fibre broadband: a platform for growth" https://www.openreach.com/content/dam/openreach/openreach-dam-files/images/hidden-pages/full-fibre-impact/Openreach%20Cebr%20Report%202021.pdf
[16] Openreach, 2021, "Ultrafast full fibre broadband: a platform for growth" https://www.openreach.com/content/dam/openreach/openreach-dam-files/images/hidden-pages/full-fibre-impact/Openreach%20Cebr%20Report%202021.pdf
[17] Openreach, 2021, "Ultrafast full fibre broadband: a platform for growth" https://www.openreach.com/content/dam/openreach/openreach-dam-files/images/hidden-pages/full-fibre-impact/Openreach%20Cebr%20Report%202021.pdf
[18] Gigabit Take-up Advisory Group "Interim Report" 2021 https://aaf1a18515da0e792f78-c27fdabe952dfc357fe25ebf5c8897ee.ssl.cf5.rackcdn.com/2249/GigaTAG+Interim+Report.pdf?v=1608208282000

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service while almost half of them (46%) prefer to stick with their current broadband as it's 'tried and tested'[19].

Even when consumers understand and perceive the benefits of a better broadband connection, price can still be a barrier. A third of (36%) of consumers across the UK are not being willing to pay more for their connections or have concerns about the switching process, with 42% of consumers worried about losing their connections while changing providers[20]. Although this data refers to consumers in general, further research would be required to understand the extent to which these barriers exist for consumers in very hard to reach areas without access to connections that meet their needs.

Which? is also aware of the challenges related to deploying new gigabit connections in hard to reach areas due to location and geographical barriers, leading to higher roll-out costs which may result in higher prices for consumers. Specific policy solutions are likely to be required to address both supply and demand in these areas.

**Approaches**

There are a number of ways in which connectivity improvements can be delivered in very hard to reach areas. We are aware that technologies such as low orbit satellites, hybrid networks and improved wireless technologies could deliver better and faster connections in very hard to reach areas in the future, but we are also aware of their limitations.  It is unlikely that there is one solution which will be capable of addressing the connectivity needs of all very hard to reach areas - rather, a blend of technologies will be required. However, many of these solutions will not be capable of delivering speeds of 1Gbps, thus not qualifying as a gigabit-capable connection. Which? recognises that in many instances there will be a trade off to be made here between cost of provision, cost to the consumer and speed of the connection.

We also believe that consumers should be informed about when they can expect these new connections to be delivered. We are aware that some solutions are already being deployed across the UK to assist consumers in isolated and hard to reach areas. Consumers will need to be informed on their availability, the eventual upfront cost to install them and which kind of connectivity they will be able to deliver. Which? recognises that some of these solutions will require time to be deployed and made available to the public, but we believe that is important that consumers are made aware of when they could be expected to receive these services.

Which? believes that all consumers should have access to reliable connections. It is critical that for very hard to reach areas, regardless of the technology used, the service delivered

[19] Yonder on behalf of Which? surveyed 2114 UK adults, of whom 1913 were solely or jointly responsible for decisions about their household broadband. The survey was conducted online between 12th and 14th March 2021. Data was weighted to be representative of the UK population by age, gender, region, social grade, tenure and work status.
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enables consumers to fully participate in the digital world in which we live. A balance must be struck to deliver affordable, good quality, connections to consumers in very hard to reach areas and ensure that they are able to benefit from access to good quality connectivity[21]. It is critical that consumers in those areas also have the information they need to understand the connectivity options available to them.

**About Which?**

Which? is the UK's consumer champion. As an organisation we're 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. We fund our work mainly through member subscriptions. We're not influenced by third parties – we never take advertising and we buy all the products that we test.

**For further information, please contact Jacopo Lange, Policy Adviser, Which? at [Jacopo.lange@which.co.uk](mailto:Jacopo.lange@which.co.uk)**

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[21] Which? Notes that some options for delivering connectivity in very hard to reach areas can be expensive both in terms of start-up cost and ongoing cost.