

## Submission from thinkbroadband.com relating to roll-out and take-up of superfast broadband in Wales

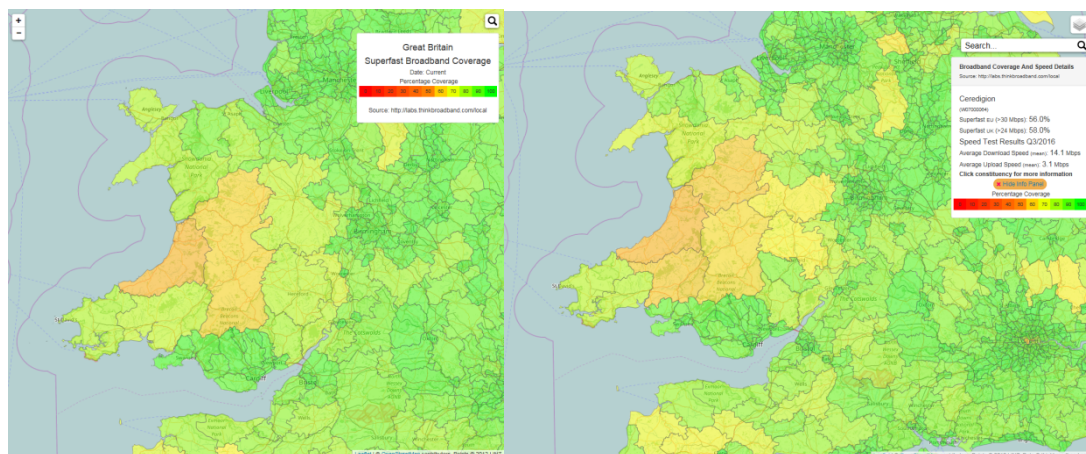
Submitted as evidence to the National Assembly's Economy, Infrastructure and Skills Committee.

The data contained in this document was sourced in the period of 28<sup>th</sup> November to 8<sup>th</sup> 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>

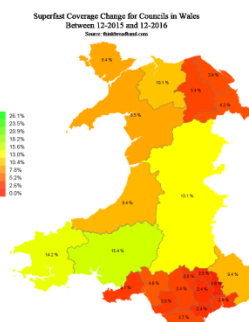
The tracking of availability is based on all the fixed line providers, which generally comprises Openreach, Virgin Media and Hyperoptic in Wales. In addition to the availability we also match a number of years of observed speed test results from the public against the various areas of Wales.

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.

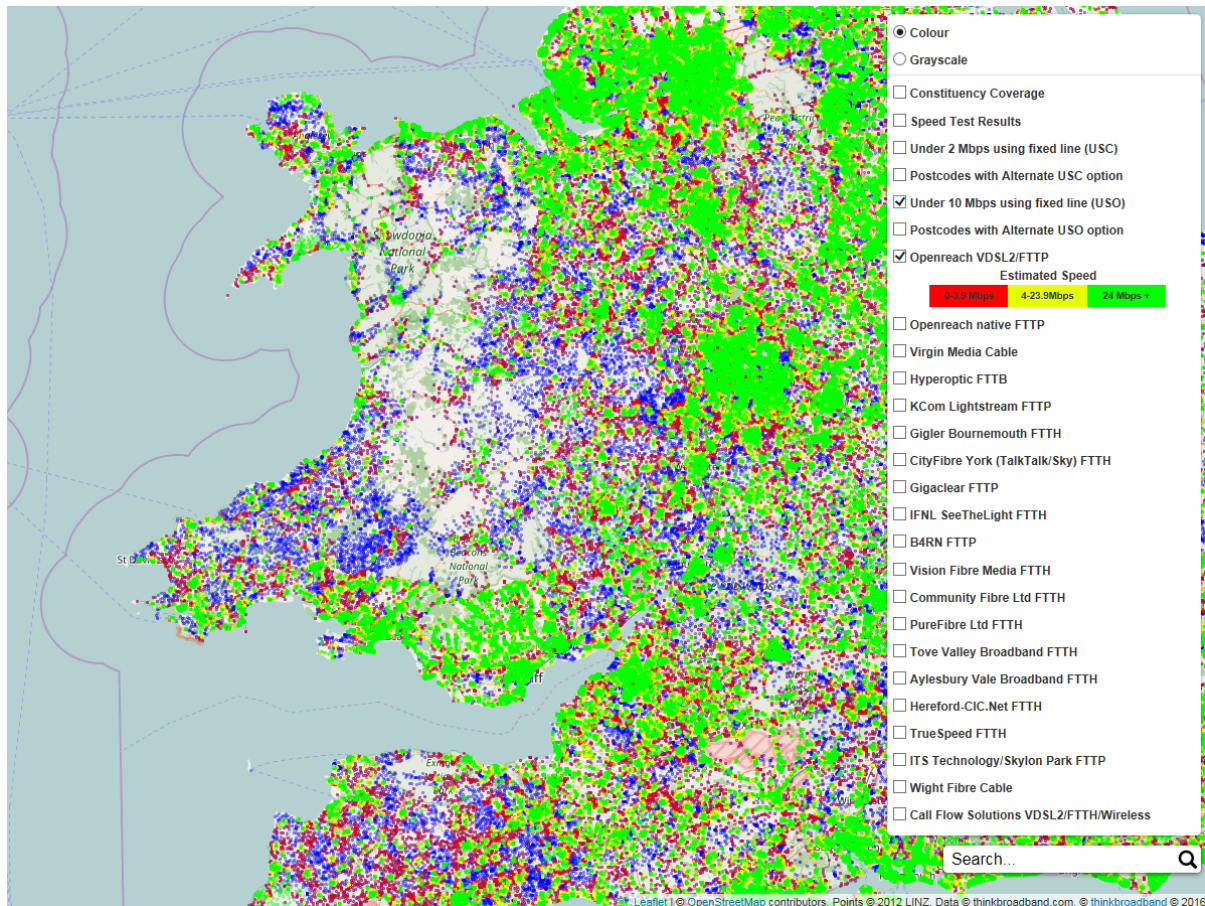


Mid and West Wales are the two areas lagging, but these are also the areas where superfast coverage was low or non-existent a few years ago.



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 7<sup>th</sup> 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 Mhns -)	Observed Average Download	Observed Average Upload
39	Rhondda	<a href="#">W07000052</a>	99.1%	98.1%	18.6	4.2
55	Cardiff West	<a href="#">W07000079</a>	98.9%	98.8%	31.3	4.7
108	Blaenau Gwent	<a href="#">W07000072</a>	98.4%	97.8%	17.7	3.9

Rank (Based on	Constituency	More Detail	Superfast (Over	Superfast (Over 30 Mbps -	Observed Average Download	Observed Average Upload
116	Swansea East	<a href="#">W07000048</a>	98.3%	98.2%	29.3	5.1
174	Swansea West	<a href="#">W07000047</a>	97.7%	97.5%	31.0	4.7
197	Cardiff South and Penarth	<a href="#">W07000080</a>	97.3%	97.2%	29.1	5.0
208	Cardiff North	<a href="#">W07000051</a>	97.2%	96.4%	27.4	4.9
223	Pontypridd	<a href="#">W07000075</a>	96.8%	96.0%	20.1	4.5
237	Merthyr Tydfil and Rhymney	<a href="#">W07000071</a>	96.6%	95.3%	18.1	3.9
246	Cynon Valley	<a href="#">W07000070</a>	96.5%	95.4%	18.0	4.1
250	Cardiff Central	<a href="#">W07000050</a>	96.4%	96.1%	28.8	4.5
251	Islwyn	<a href="#">W07000077</a>	96.4%	94.6%	18.7	4.2
262	Caerphilly	<a href="#">W07000076</a>	96.2%	94.6%	18.8	4.1
268	Torfaen	<a href="#">W07000053</a>	96.1%	94.8%	20.9	4.1
278	Newport West	<a href="#">W07000056</a>	95.9%	95.5%	27.8	4.8
291	Aberavon	<a href="#">W07000049</a>	95.9%	95.2%	31.2	4.9
295	Newport East	<a href="#">W07000055</a>	95.8%	95.5%	24.7	4.3
317	Bridgend	<a href="#">W07000073</a>	95.5%	94.6%	19.5	4.6
338	Alyn and Deeside	<a href="#">W07000043</a>	95.1%	94.1%	18.5	3.9
369	Wrexham	<a href="#">W07000044</a>	94.2%	93.4%	17.0	3.7
381	Ogmore	<a href="#">W07000074</a>	93.9%	90.9%	16.5	3.6
405	Llanelli	<a href="#">W07000045</a>	93.1%	91.7%	16.5	3.7
411	Neath	<a href="#">W07000069</a>	93.1%	92.0%	23.5	3.9
439	Vale of Clwyd	<a href="#">W07000060</a>	91.9%	90.9%	18.2	3.8
451	Vale of Glamorgan	<a href="#">W07000078</a>	91.3%	90.6%	24.4	4.0
453	Gower	<a href="#">W07000046</a>	91.1%	90.3%	22.2	4.0

Rank (Based on)	Constituency	More Detail	Superfast (Over 10Mbps)	Superfast (Over 30Mbps)	Observed Average Download	Observed Average Upload
520	Aberconwy	<a href="#">W07000058</a>	86.6%	85.1%	15.9	3.5
522	Arfon	<a href="#">W07000057</a>	86.5%	84.1%	16.6	3.6
545	Delyn	<a href="#">W07000042</a>	84.4%	82.6%	17.7	3.6
575	Clwyd West	<a href="#">W07000059</a>	81.2%	80.2%	15.1	3.3
587	Ynys Mon	<a href="#">W07000041</a>	79.7%	78.0%	16.6	3.5
590	Monmouth	<a href="#">W07000054</a>	79.6%	77.9%	15.8	3.5
597	Preseli Pembrokeshire	<a href="#">W07000065</a>	78.6%	76.7%	16.3	3.4
598	Carmarthen West and South Pembrokeshire	<a href="#">W07000066</a>	78.4%	76.9%	15.9	3.5
609	Clwyd South	<a href="#">W07000062</a>	76.5%	74.3%	14.8	3.2
616	Dwyfor Meirionnydd	<a href="#">W07000061</a>	74.0%	72.1%	16.8	3.6
636	Brecon and Radnorshire	<a href="#">W07000068</a>	63.5%	62.1%	12.5	2.5
637	Carmarthen East and Dinefwr	<a href="#">W07000067</a>	62.5%	59.8%	11.8	2.7
638	Montgomeryshire	<a href="#">W07000063</a>	62.1%	60.5%	12.6	2.5
646	Ceredigion	<a href="#">W07000064</a>	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.