

## 5 Telecoms and networks

### 5.1 Recent developments in Wales

#### Superfast Cymru

The Welsh Government and BT are working together to deliver the Superfast Cymru programme, the largest partnership of its kind in the UK. Superfast Cymru seeks to build on commercial fibre roll-out, with the aim of providing 96% of premises across Wales with access to fibre broadband by 2016. The Superfast Cymru programme will use a combination of public and private funds to deliver broadband to parts of Wales that are not covered by commercial plans; it increases the total investment in fibre broadband in Wales.

The fibre broadband roll-out will begin during 2013/14 in two-thirds of unitary authorities in Wales: Blaenau Gwent, Bridgend, Caerphilly, Denbighshire, Flintshire, Gwynedd, Isle of Anglesey, Merthyr Tydfil, Neath Port Talbot, Newport, Powys, Rhondda Cynon Taff, Swansea and the Vale of Glamorgan. Roll-out will be underway in all unitary authorities by 2014/15.

#### Broadband support scheme

The Welsh Government Minister for Economy, Science and Transport, Edwina Hart AM, announced in March 2013 that the Broadband Support Scheme would be extended for an additional six months. The scheme provides a grant of up to £1,000 to those who live in 'not-spots' and 'slow-spots' throughout Wales to help them find alternative broadband solutions e.g. satellite or wireless.

### 5.2 Availability of fixed broadband services

#### LLU broadband availability in Wales was the second highest among the UK nations at the end of 2012

Almost all UK premises are connected to an ADSL-enabled BT local exchange, although some may not be able to receive ADSL broadband services, or may be able to do so only at very slow speeds, as a result of the long length or poor quality of the line from the premises to the local exchange.

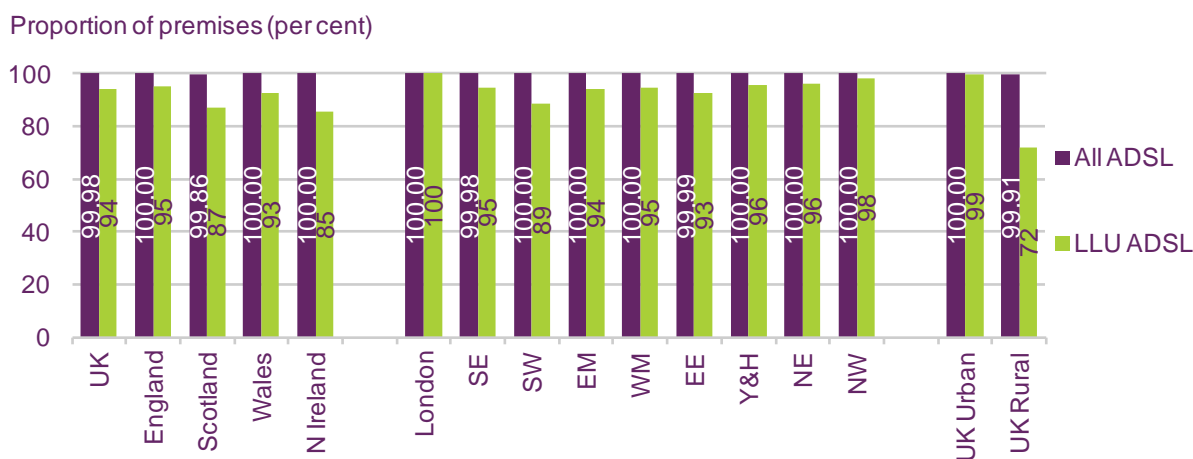
BT has just under 5,600 local exchanges, of which around 30 were not able to provide ADSL broadband at the end of 2012. Most of the BT local exchanges that are not capable of providing ADSL broadband are in Scotland (the remainder being in England) and the proportion of premises connected to an ADSL-enabled BT exchange is marginally lower in Scotland than in the rest of the UK (Figure 5.1).

Local loop unbundling (LLU) operators are able to provide fixed telecoms services by placing their own network equipment in the incumbent's local exchange. This is then connected to the LLU provider's backhaul network and ADSL broadband services are provided to the end user over the copper line from the exchange, which is leased from the incumbent operator. LLU operators generally benefit from economies of scale that are not available when purchasing wholesale services on a per-unit basis, and are better able to differentiate their services from those offered by their competitors. Premises in LLU-enabled exchange areas benefit, as they usually have a greater choice of ADSL broadband services, and access to lower-cost services.

We estimate that 94% of UK premises were connected to an unbundled BT local exchange at the end of 2012, two percentage points higher than had been the case a year previously. This increase was largely due to LLU providers deploying services in rural areas: while the proportion of premises connected to an LLU-enabled local exchange in urban areas was unchanged at 99% during the year, the proportion in rural areas increased by over eight percentage points, to 72%. This pattern is typical of telecoms network deployment: roll-out usually begins in urban areas (where there are larger numbers of premises and therefore potential customers), and subsequently spreads to less densely populated areas. In fact, urban LLU availability was at a similar level to current rural availability as far back as 2006.

Wales had the second-highest availability of LLU broadband at the end of 2012, when 93% of premises were connected to an LLU-enabled BT local exchange. Across the UK nations this proportion ranged from 85% in Northern Ireland to 95% in England (in Scotland it was 87%).

**Figure 5.1 Proportion of premises connected to ADSL and LLU-enabled exchanges: December 2012**



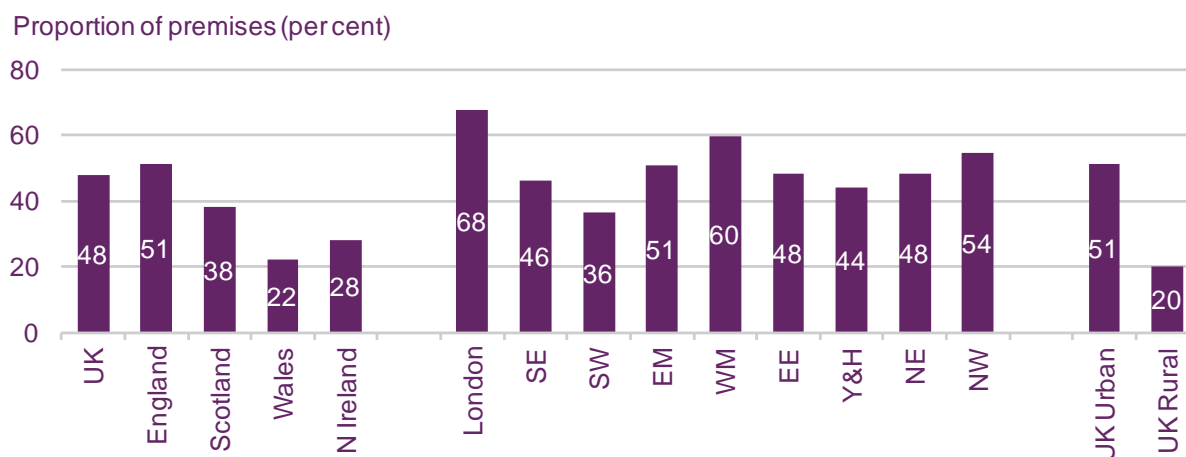
Sources: Ofcom/BT, December 2012 data

**Wales had the lowest availability of cable broadband services among the UK nations at the end of 2012**

As part of its work to monitor the UK's communications infrastructure, Ofcom collects data which show the total number of premises that are in postcodes in which one or more premise can receive services from cable and fibre broadband networks. This methodology is likely to slightly overestimate the coverage of these networks, as not all premises in a postcode will necessarily be able to receive the same services.

Data provided to Ofcom by Virgin Media show that 48% of UK premises were in postcodes that were served by its cable broadband network in June 2013 (Figure 5.2). Among the UK nations, the proportion of premises in postcodes served by Virgin Media's cable broadband network was lowest in Wales, at 22%, and highest in England at 51%. All of Virgin Media's cable network is able to provide broadband speeds of 'up to' 100Mbit/s, and Virgin Media is rolling out an upgrade to 'up to' 120Mbit/s; due to be completed by the end of 2013.

**Figure 5.2 Proportion of premises in postcodes served by Virgin Media’s cable broadband network**



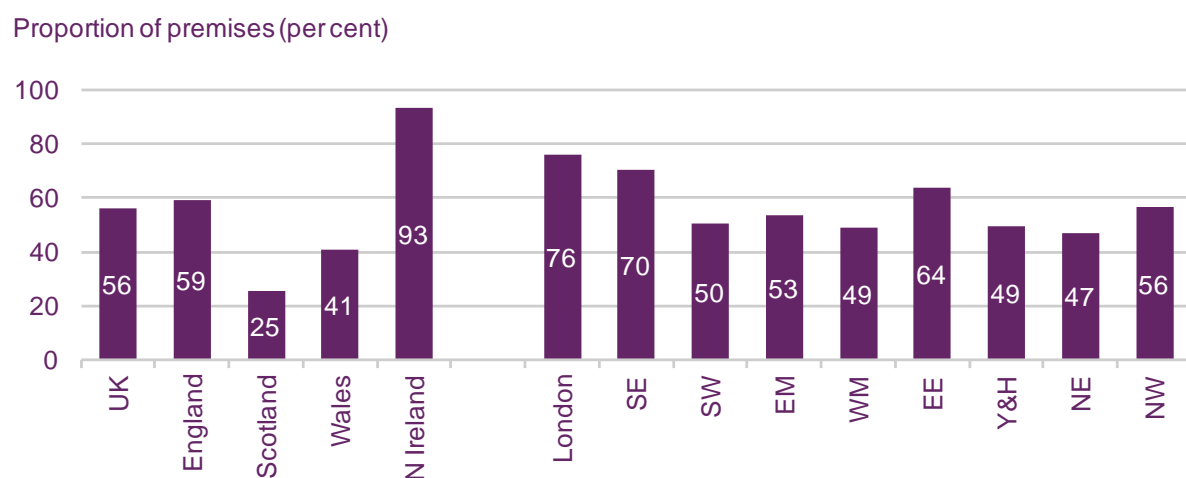
Sources: Ofcom/Virgin Media, June 2013 data

**Wales had the second-lowest availability of fibre broadband among the UK nations in June 2013**

Data provided to Ofcom by BT Openreach and Kcom (the incumbent operator in the Kingston-upon-Hull area) show that over half of UK premises (56%) were in postcodes that were served by their fibre broadband networks by June 2013 (Figure 5.3). Once again, this is likely to slightly overstate the availability of fibre broadband services, as different premises in the same postcode may be served by different street cabinets, and one cabinet may have been upgraded while another has not.

In Wales, 41% of premises were in postcodes served by BT Openreach’s fibre network by June 2013, the second-lowest proportion across the UK nations after Scotland (25%). The proportion of premises that were served by BT Openreach/ Kcom’s fibre networks was highest (at 93%) in Northern Ireland, which has benefitted from a Department of Enterprise, Trade and Investment (DETI) initiative to increase the availability of superfast broadband services.

**Figure 5.3 Proportion of premises in postcodes served by BT Openreach/ Kcom fibre broadband networks**



Sources: Ofcom/BT Openreach/Kcom, June 2013 data

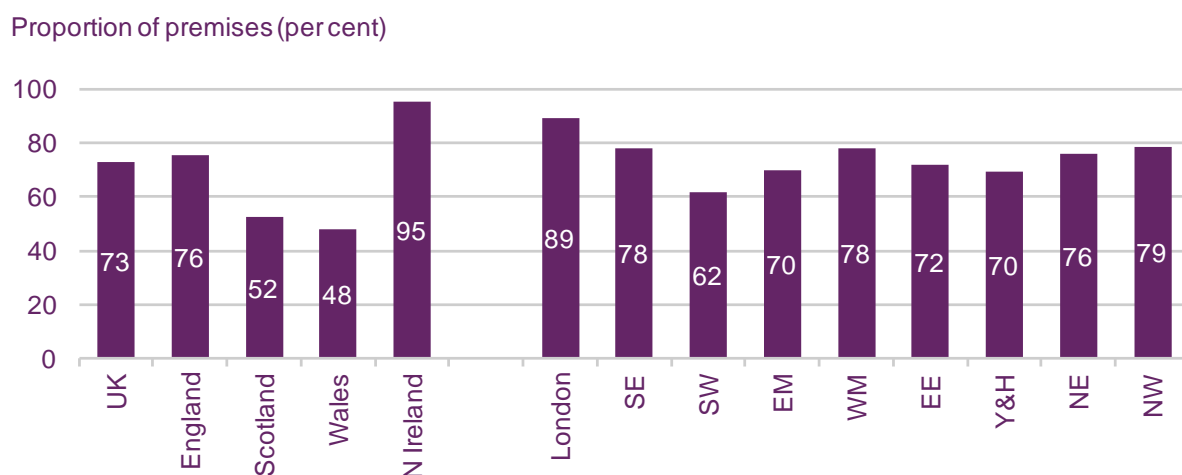
## Wales had the largest increase in the proportion of premises that are in postcodes served by NGA networks in the year to June 2013

By overlaying the Virgin Media cable broadband availability data in Figure 5.2 with the BT Openreach/ Kcom fibre availability data in Figure 5.3 we are able to estimate the proportion of premises that are in postcodes served by the next-generation access (NGA) networks which are used to provide superfast broadband services. As previously, this methodology is likely to slightly overestimate NGA coverage (despite the fact that this analysis includes only Virgin Media, BT Openreach and Kcom's NGA networks), as not all premises in a postcode will necessarily be able to receive NGA services.

This analysis suggests that just under three-quarters of UK premises (73%) were in postcodes served by NGA networks by June 2013, up from 65% in June 2012 (Figure 5.4). Across the UK nations this proportion was lowest in Wales at 48%, and highest in Northern Ireland at 95%, with just over half of premises in Scotland (52%) and three-quarters of premises in England (76%) being within NGA network footprints. Wales had the largest increase in the proportion of premises in postcodes served by NGA networks in the year to June 2013, an 11 percentage point increase compared to the 37% recorded in June 2012.

Not all broadband connections provided by NGA networks will necessarily achieve 'superfast' speeds (here defined as an actual downstream speed of 30Mbit/s or higher). In particular, the speed achieved on a given line using fibre-to-the-cabinet (FTTC) technology will depend on the length and quality of the copper connection from the street cabinet to the consumer's premises.

**Figure 5.4 Proportion of premises in postcodes served by NGA networks**



Sources: Ofcom/operators, June 2013 data

## 5.3 Availability of mobile services

### The proportion of premises in areas with outdoor mobile coverage varies across the UK nations

Ofcom research suggests that 92% of UK adults had a mobile phone in Q1 2013. While mobile use is widespread, there are still areas of the country where a lack of network coverage means that making mobile phone calls, sending text messages or accessing the internet over a cellular network is not possible. These areas, which are often referred to as 'mobile not-spots', are often characterised by low population density and/or undulating terrain, and present physical and economic obstacles that may deter mobile network

operators (MNOs) from installing mobile phone masts in these areas. In other areas of the UK, some operators have installed masts and provide a mobile service where other operators do not have a presence, leading to the creation of 'partial not-spots'.

### **How we measure the availability of mobile telephony for this report**

The coverage information presented in Ofcom's *Communications Market Reports* and *Infrastructure Report* is collected by Ofcom from the four MNOs. Information on coverage is provided by each operator for each 200x200m pixel of landmass across the UK. This information is correlated with maps of premises to give the premises coverage figures.

The availability figures quoted all refer to outdoor coverage. Coverage figures for indoor reception are likely to be lower, because radio signals are attenuated as they pass through the fabric of buildings. Indoor reception is highly dependent on the building in which reception is desired, and where the user is located in the building, making it difficult to calculate accurate indoor coverage figures.

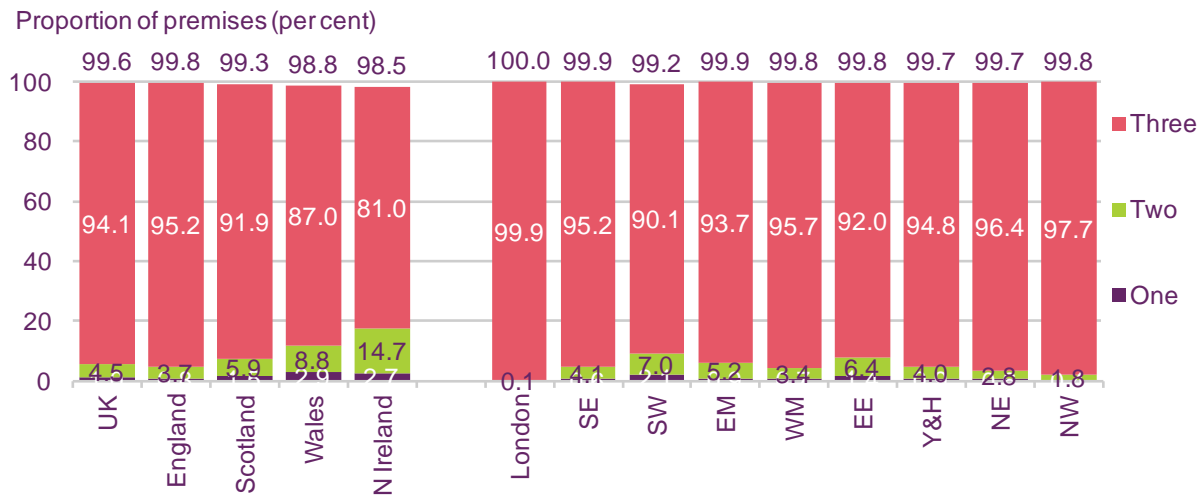
Figure 5.5 and Figure 5.6 show in detail levels of mobile coverage based on premises (i.e. homes and offices) for 2G and 3G services respectively. 3G is often considered the minimum necessary to provide a satisfactory experience of mobile internet, while 2G is considered satisfactory for telephone calls and text messaging. Mobile network operator Everything Everywhere (EE) launched 4G mobile services in the UK in October 2012, but we do not include details of 4G mobile coverage here.

### **98.8% of premises in Wales were in areas with outdoor 2G coverage in June 2013**

The coverage data provided to us by MNOs shows that by June 2013, 94.1% of premises had outdoor coverage from all three UK 2G network operators (EE, O2 and Vodafone) (Figure 5.5). In total, 99.6% of premises were in areas where at least one mobile network provided outdoor 2G coverage, suggesting that 0.4% of UK premises (around 100,000 premises) were in areas without any 2G mobile coverage. The proportion of premises in areas with outdoor 2G coverage recorded in June 2013 is slightly lower than the 99.7% figure, calculated from 2011 data, that was included in the 2012 *Communications Market Reports*, and we are investigating this discrepancy.

2G coverage was slightly higher than average in England in June 2013, when 99.8% of premises were in areas with outdoor 2G mobile coverage. Wales had the second lowest proportion of premises with outdoor coverage from all three 2G networks in June 2013, at 87.0%, while 1.2% of premises in Wales (around 20,000 premises) were in areas without 2G coverage. The lower-than-average network coverage in Wales is a reflection of its hilly terrain, which restricts the propagation of mobile signals. Northern Ireland had the lowest 2G population coverage across the UK nations, with 81.0% having outdoor coverage from all three networks, and 1.5% being in areas without any 2G coverage.

**Figure 5.5 2G mobile premises coverage, by number of operators**



Sources: Ofcom/operators, June 2013 data

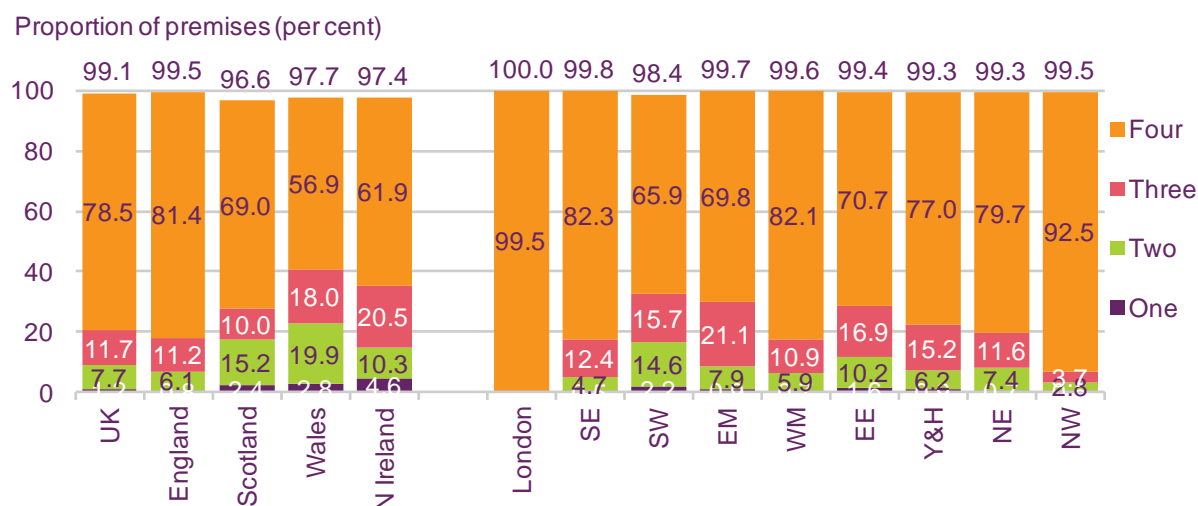
Note: Coverage is based on 200m square pixels covering the UK

**Wales had the second highest proportion of premises in areas with outdoor 3G coverage in June 2013**

Our analysis suggests that 99.1% of UK premises were in areas where there was outdoor 3G mobile coverage in June 2013, while 78.5% were in areas where there was similar coverage from all four UK 3G networks (EE, O2, Vodafone and Three). Conversely, 0.9% of premises were in areas without any 3G mobile reception, equivalent to around 260,000 premises.

As was the case with 2G services, the proportion of premises in areas with outdoor 3G mobile coverage was highest in England, where 99.5% of premises were in areas with coverage from at least one 3G network and 81.4% had coverage from all four (Figure 5.6). Wales had the second-highest proportion of premises in areas with outdoor 3G coverage from at least one MNO in June 2013, at 97.7%, 1.4 percentage points lower than the UK average, although it also had the lowest proportion of premises with similar coverage from all four 3G networks, at 56.9%.

**Figure 5.6 3G mobile premises coverage, by number of operators**



Sources: Ofcom/operators, June 2013 data

Note: Coverage is based on 200m square pixels covering the UK

## 5.4 Service take-up

### Take-up of fixed line and broadband services are lower than average in Wales

Landline and overall broadband take-up were both below the UK averages for these services in Wales in Q1 2013 (Figure 5.7). The difference between take-up levels in Wales and the UK average was greatest for broadband services, where the proportion of adults in Wales who had a fixed or mobile broadband connection (66%) was nine percentage points lower than the UK average (75%), as a result of fixed broadband take-up in Wales (63%) being lower than the UK average of 72%. Fixed line take-up in Wales (76%) was eight percentage points lower than the UK average of 84%.

Mobile phone take-up remained high in Wales in Q1 2013, with over nine in ten adults (92%) having a mobile phone in Q1 2013, identical to the UK average. Smartphone take-up in Wales (49%) was also in line with the UK average (51%), and Wales had the highest proportion of homes that were mobile-only across the UK nations, at 23%.



**Figure 5.7 Take-up of communications services, 2013**

		UK	Wales	England	Scotland	N Ireland	Wales urban	Wales rural
<b>Individual</b>								
<b>Voice telephony</b>	Fixed Line	<b>84%</b>	76%	85%	83%	82%	74%	86%
	Mobile phone	<b>92%</b>	92%	92%	92%	94%	92%	91%
	Smartphone	<b>51%</b>	49%	52%	45%	45%	50%	48%
	Mobile-only homes	<b>15%</b>	23%	15%	16%	18%	26%	13%
<b>Internet</b>	Total Internet	<b>80%</b>	75%	81%	76%	78%	74%	81%
	Broadband (fixed and mobile)	<b>75%</b>	66%	76%	70%	74%	64%	73%
	Fixed Broadband	<b>72%</b>	63%	73%	67%	71%	62%	67%
	Mobile Broadband	<b>5%</b>	7%	5%	7%	5%	7%	8%
	Mobile internet	<b>49%</b>	47%	49%	44%	45%	46%	49%

QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD2. Do you personally use a mobile phone?/ QD24B. Do you personally use a smartphone?/ QE1. Does your household have a PC or laptop computer?/ QE2. Do you or does anyone in your household have access to the internet/ world wide web at home?/ QE9. Which of these methods does your household use to connect to the Internet at home?/ QD28A. Which if any, of the following activities, other than making and receiving voice calls, do you use your mobile for?

Source: Ofcom research, Q1 2013

Base: All adults aged 16+ (n = 3750 UK, 492 Wales, 2250 England, 501 Scotland, 507 Northern Ireland, 247 Wales urban, 245 Wales rural)

### Two-thirds of households in Wales have a broadband connection

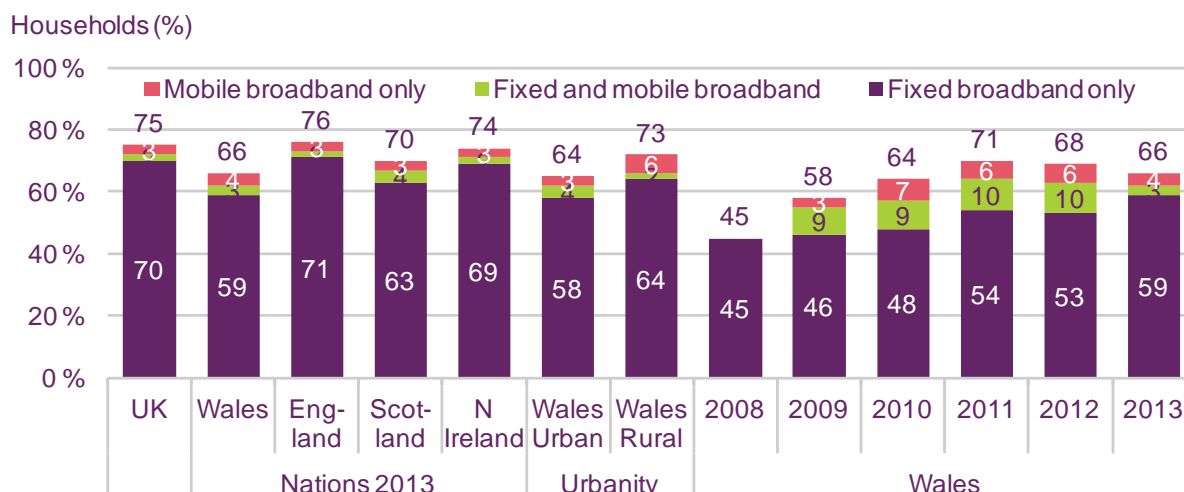
Sixty-six per cent of households in Wales had a broadband connection in Q1 2013, nine percentage points less than the UK average of 75% (Figure 5.8). Household broadband take-up has remained stable in Wales since Q1 2011, and was the lowest among the devolved nations in Q1 2013.<sup>30</sup> In rural areas of Wales 73% of homes had access to broadband in Q1 2013, in line with the UK average, although take-up was lower than average in urban areas of Wales, at 64%.

The proportion of homes in Wales with fixed broadband increased by six percentage points to 59% in the year to Q1 2013, although this is still below the UK average of 70%. As was the case across the UK as a whole, the use of mobile broadband fell in Wales over the same period (in the case of Wales down by nine percentage points to 7%). As there was an increase in the proportion of households that only accessed the internet using a smartphone during the same period, it is likely that some consumers are now using smartphones instead of dongles to access the internet.

<sup>30</sup> The differences in total broadband take-up between Q1 2011, Q1 2012 and Q1 2013 are not statistically significant at a 95% confidence level. Differences in total broadband take-up in Q1 2013 between Wales and both England and Northern Ireland are statistically significant.



**Figure 5.8 Consumer broadband take-up in Wales, by connection type**



Source: Ofcom research, Q1 2013

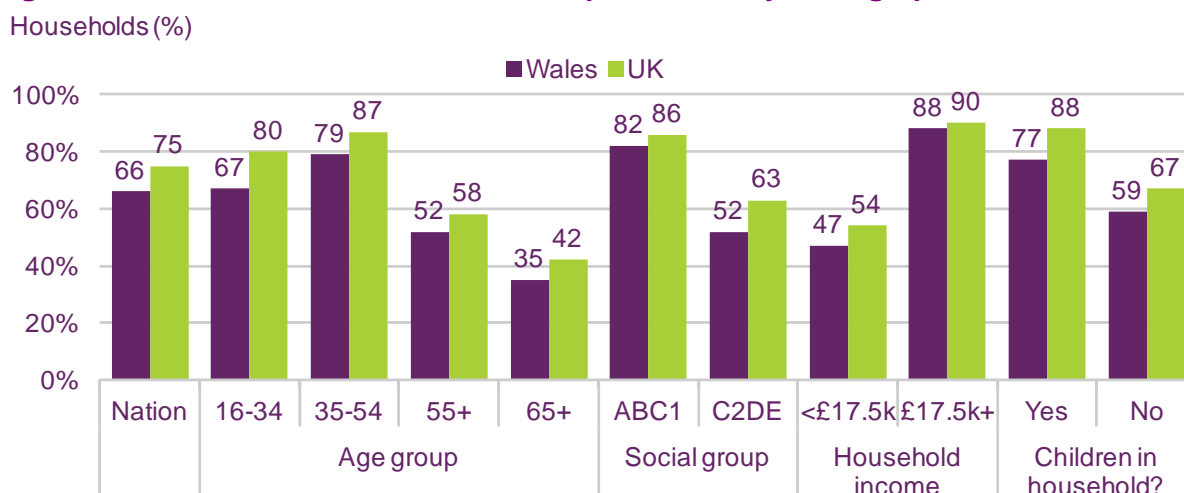
Base: All adults aged 16+ (n = 3750 UK, 492 Wales, 2250 England, 501 Scotland, 507 Northern Ireland, 247 Wales urban, 245 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013)

QE9. Which of these methods does your household use to connect to the internet at home? (NB 2008 survey did not cover mobile broadband. 2008 measure shows any broadband)

**Older, and lower-income, households are least likely to have broadband in Wales**

Consumers in Wales over the age of 65 (35%) and those living in households with an annual income of less than £17.5k (47%) were the least likely to have broadband access in Q1 2013, reflecting the pattern seen across the UK as a whole (Figure 5.9). There were differences in broadband take-up between those over the age of 65 (35%) and over the age of 55 (52%) in Wales, although the largest differences between Wales and the UK average was among the 16 to 34 age group (67% and 80% respectively), C2DE households (52% and 63%), and households with children (77% and 88%).

**Figure 5.9 Consumer broadband take-up in Wales, by demographic**



Source: Ofcom research, Q1 2013

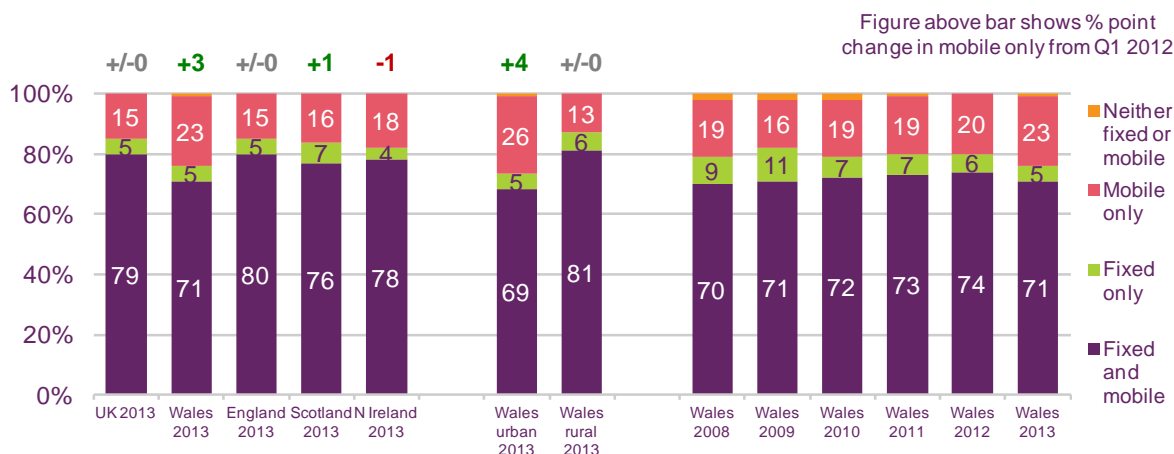
Base: All adults aged 16+ (n = 492 Wales, 140 16-34s, 234 35-64s, 118 65+, 225 ABC1, 267 C2DE, 185 <£17.5k income, 141 £17.5k+, 172 children in home, 320 no children in home)

QE9. Which of these methods does your household use to connect to the internet at home?

## Wales has the highest proportion of mobile-only households among the UK nations

Just less than one in four households in Wales (23%) solely used mobile phones to make and receive calls in the home in Q1 2013, a three percentage point increase compared to the previous year (Figure 5.10). Just over seven in ten households in Wales (71%) used both fixed and mobile telephone services, while a further 5% used only a fixed line. Over a quarter (26%) of households in urban areas of Wales were mobile-only in Q1 2013, an increase of four percentage points compared to Q1 2012, and twice the proportion recorded in rural areas (13%).

**Figure 5.10 Cross-ownership of household telephony services**



QC1. Is there a landline phone in your home that can be used to make and receive calls?/ QD1. How many mobile phones in total do you and members of your household use?

Source: Ofcom research, Q1 2013

Base: All adults aged 16+ (n = 3750 UK, 492 Wales, 2250 England, 501 Scotland, 507 Northern Ireland, 247 Wales urban, 245 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013)

## Over half of mobile users in Wales have a smartphone

As was the case across the UK, smartphone adoption continued to increase in Wales in the year to Q1 2013, when over half (54%) of mobile phone users in Wales used a smartphone, a 12 percentage point increase compared to Q1 2012 (Figure 5.11). Among the UK nations, Wales had the second highest smartphone take-up among mobile users in Q1 2013, after England (57%), and smartphone take-up increased in both urban and rural areas of Wales during the year, with the increase being higher in rural areas (at 17 percentage points) than in urban ones (11 percentage points).

**Figure 5.11 Take-up of smartphones among mobile users**



*QD24B. Do you personally use a smartphone? A smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of Smartphone include BlackBerry, iPhone and Android phones such as the Samsung Galaxy.*

Source: Ofcom research, Q1 2013

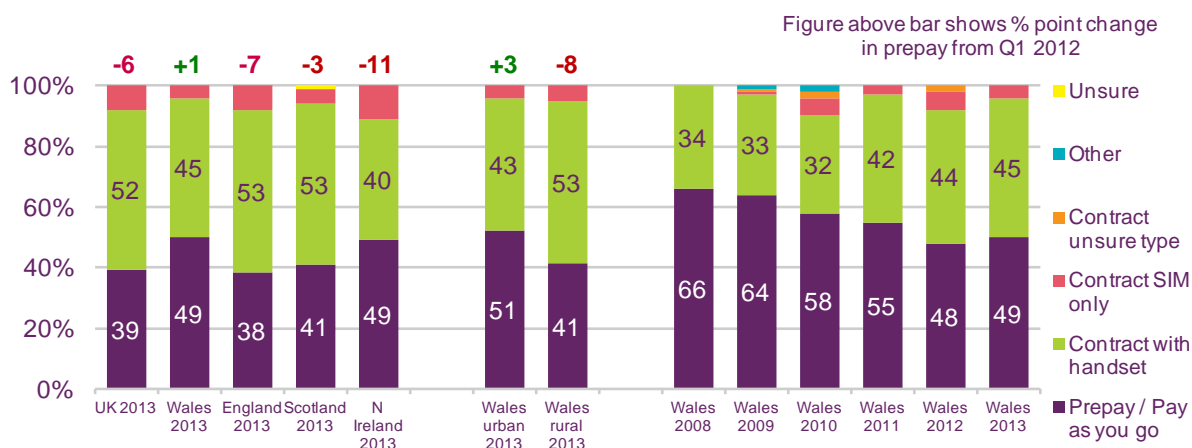
Base: Adults aged 16+ who personally use a mobile phone (n = 3387 UK, 440 Wales, 2020 England, 464 Scotland, 463 Northern Ireland, 222 Wales urban, 218 Wales rural, 416 Wales 2011, 456 Wales 2012, 440 Wales 2013)

### **Contract use remains unchanged in Wales, despite growth in smartphone take-up**

Forty-nine per cent of mobile phone users in Wales used pay-as-you-go mobile services in Q1 2013, ten percentage points higher than the UK average (39%). The year to Q1 2013 was the first period since 2008 when there was no decline in pay-as-you-go use in Wales (Figure 5.12). Increasing use of mobile contracts was noted in rural areas of Wales, but not in urban areas: 41% of mobile users in rural areas were using a pay-as-you-go service (eight percentage points lower than in Q1 2012) compared to 51% of those in urban locations (a three percentage point increase since Q1 2012).

Use of pay-as-you-go mobile contracts was lower than average among smartphone users in Wales in Q1 2013, at 27% of users. Pay-monthly contracts are popular among smartphone users as they allow consumers to spread the cost of the handset (which is often hundreds of pounds) across the lifetime of the contract.

**Figure 5.12 Type of mobile subscription**



QD11. Which of these best describes the mobile package you personally use most often? (NB 2008 survey did not cover type of contract)

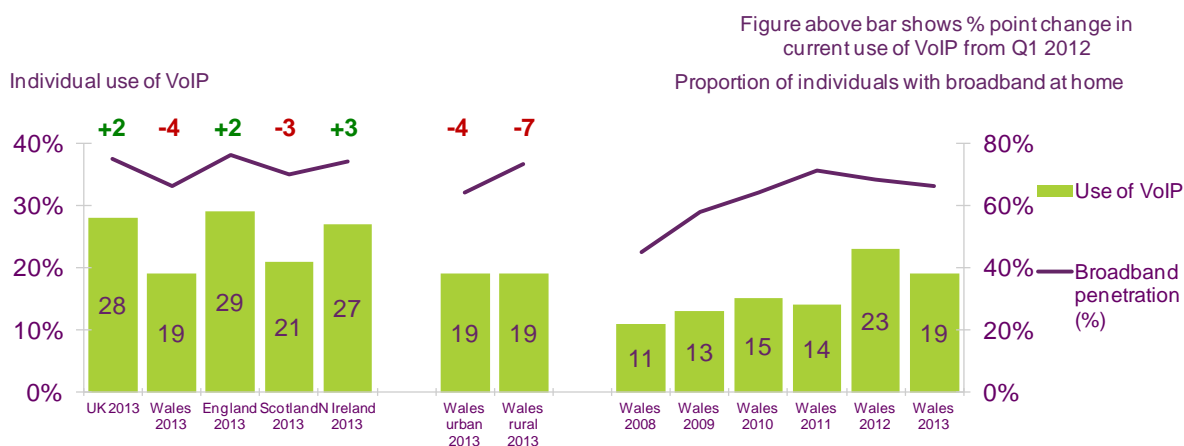
Source: Ofcom research, Q1 2013

Base: Adults aged 16+ who personally use a mobile phone (n = 3387 UK, 440 Wales, 2020 England, 464 Scotland, 463 Northern Ireland, 222 Wales urban, 218 Wales rural, 656 Wales 2008, 836 Wales 2009, 923 Wales 2010, 416 Wales 2011, 456 Wales 2012, 440 Wales 2013)

### Reported levels of voice over IP use fell in Wales in 2013

Less than one in five adults in Wales (19%) claimed to use voice over IP (VoIP) services in Q1 2013, the lowest proportion recorded across the UK nations (Figure 5.13). As was the case in Scotland, there was a decline in VoIP use in Wales in the year to Q1 2013, which was evident in both rural and urban areas (down by four percentage points and seven percentage points respectively). Across the UK as a whole, 28% of adults claimed to use VoIP in Q1 2013, a two percentage point increase compared to Q1 2012.

**Figure 5.13 Individual use of voice over IP**



QE30. Have you or anyone in your household ever used one of these services to make voice calls using the internet?/QE5. Which, if any, of these do you use the internet for? \*NB 2013 measure combines responses from internet users (at QE5A) and all UK adults (at QE30), data not comparable with previous years. \*NB Question wording for QE5A-B prior to 2013 asked about household use of the internet at home. In 2013 QE5A-B asked about individual use of the internet anywhere.

Source: Ofcom research, Q1 2013

Base: All adults aged 16+ (n = 3750 UK, 492 Wales, 2250 England, 501 Scotland, 507 Northern Ireland, 247 Wales urban, 245 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011, 513 Wales 2012, 492 Wales 2013)

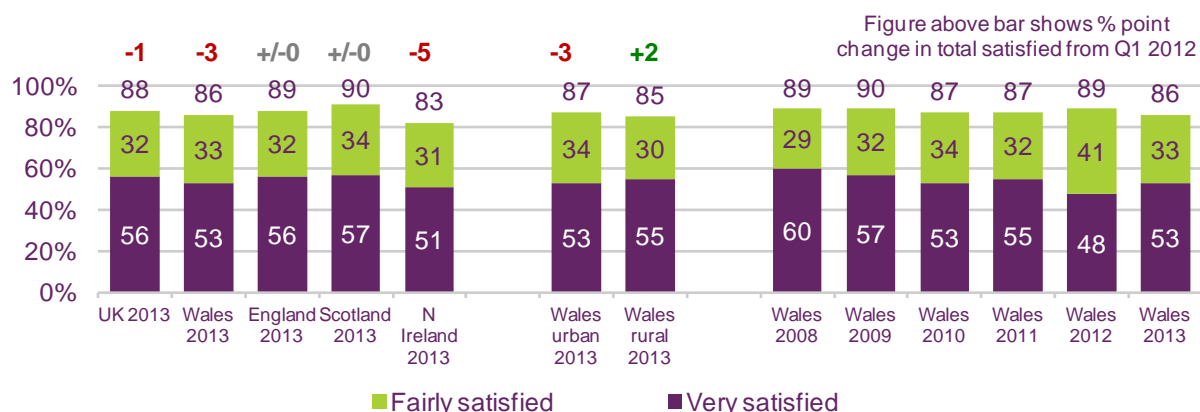
## 5.5 Satisfaction with telecoms services

### Satisfaction with mobile reception remains high in Wales

Satisfaction levels with communication services in Wales were comparable to the UK averages in Q1 2013, with over four in five adults saying they were satisfied with their fixed line and mobile telephony services. Overall satisfaction with mobile services was high, with over nine in ten (94%) of mobile users being either 'very' or 'fairly' satisfied with their service, and satisfaction with mobile reception (86%) also remained high (Figure 5.14). But although satisfaction levels were high, they were below those reported in Wales in Q1 2012.

Satisfaction with fixed-line services was also high, with just under nine in ten (88%) of landline users being satisfied, five percentage points lower than in Q1 2012. Levels of satisfaction with fixed broadband services (85%) were also high, although, again, this was lower than the figure recorded in Q1 2012 (91%). Satisfaction with the speed of fixed broadband connections was lower than overall satisfaction, with three in four adults (75%) saying they were either 'very' or 'fairly' satisfied, down from 83% in 2012.

**Figure 5.14 Satisfaction with mobile reception**



QD21c. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for reception/ accessing network?

Source: Ofcom research, Q1 2013

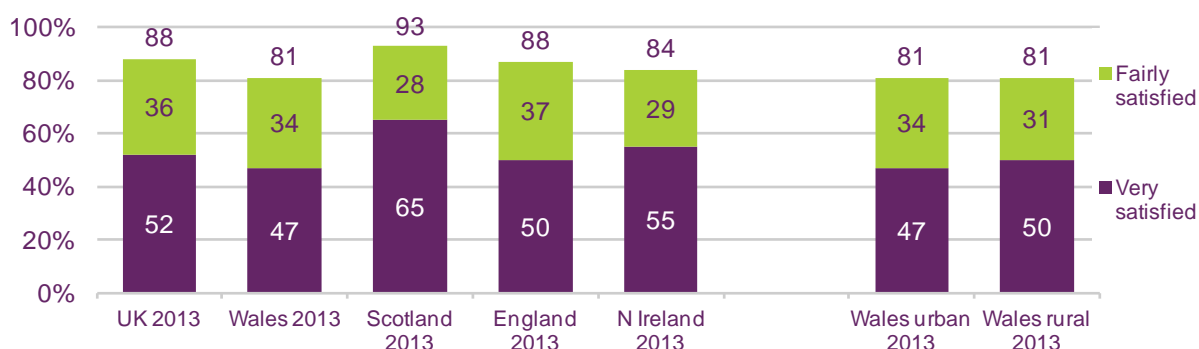
Base: Adults aged 16+ who personally use a mobile phone (n = 3387 UK, 440 Wales, 2020 England, 464 Scotland, 463 Northern Ireland, 222 Wales urban, 218 Wales rural, 645 Wales 2008, 836 Wales 2009, 923 Wales 2010, 416 Wales 2011, 456 Wales 2012, 440 Wales 2013)

Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with their mobile reception

**Satisfaction with ability to connect to the internet via a mobile network is lowest in Wales**

Just over four in five mobile users in Wales (81%) were either 'very' or 'fairly' satisfied with their ability to access the internet using 3G in Q1 2013, lower than the 88% average recorded across all of the UK nations (Figure 5.15). Around half of mobile users in Wales (47%) claimed to be 'very' satisfied with their ability to access 3G services, the lowest level among the UK nations and five percentage points lower than the UK average of 52%.

**Figure 5.15 Satisfaction with ability to connect to the internet via a 3G or 4G network**



QD21k. Thinking about your mobile phone service only, how satisfied are you with (main supplier) for ability to connect to the internet using the mobile network (3G or 4G)?

Source: Ofcom research, Q1 2013

Base: Adults aged 16+ who personally use a smartphone (n = 1683 UK, 212 Wales, 1052 England, 220 Scotland, 199 Northern Ireland, 108 Wales urban, 104 Wales rural)

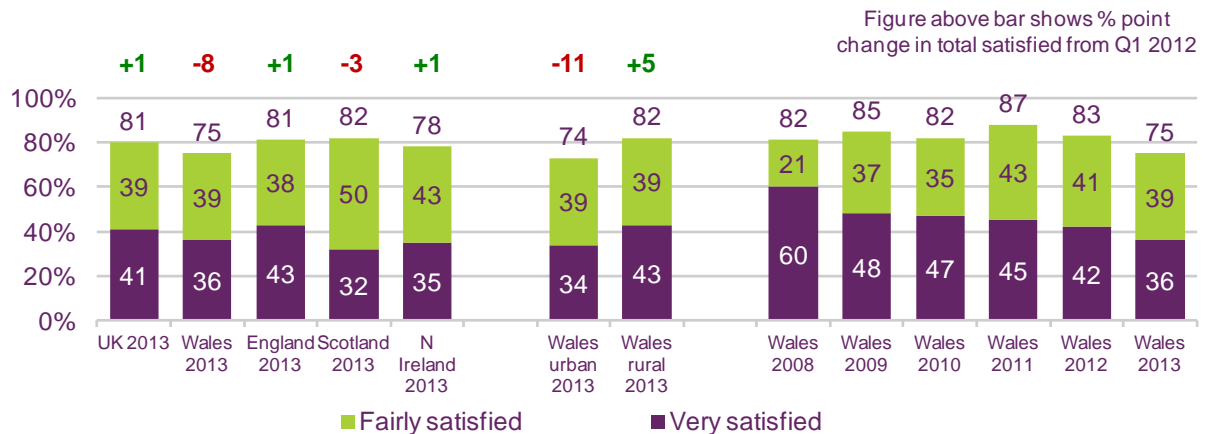
Note: Figures above chart columns indicate the proportion of people who were 'very' or 'fairly' satisfied with the ability to connect to the internet using the mobile network

## Decline in satisfaction with speed of fixed broadband service in Wales

Seventy-five per cent of fixed broadband users in Wales said that they were ‘very’ or ‘fairly’ satisfied with the speed of their fixed broadband service in Q1 2013, eight percentage points lower than the 83% recorded in Q1 2012, and 12 percentage points less than the Q1 2011 figure of 87% (Figure 5.16). Similarly, in the year to Q1 2013 the proportion of fixed broadband users in Wales who claimed to be ‘very’ satisfied with the speed of their service fell from 43% to 34%.

The decline in satisfaction with fixed broadband speeds in Wales in the year to Q1 2013 was driven by falling satisfaction in urban areas, where just under three in four fixed broadband users (74%) were either ‘very’ or ‘fairly’ satisfied with the speed of their service in Q1 2013. This was 11 percentage points lower than the Q1 2012 figure of 85%, and the proportion who were ‘very satisfied’ fell from 43% to 34%. This compares to the 82% of fixed broadband users in rural areas who were satisfied with their fixed broadband speed in Q1 2013, an increase of five percentage points compared to Q1 2012. In the year to Q1 2012 the opposite had been true, and falling satisfaction with fixed broadband speeds had reflected falling satisfaction in rural areas.

**Figure 5.16 Satisfaction with speed of fixed broadband connection**



QE8b. Thinking about your fixed broadband internet service, how satisfied are you with (main supplier) for the speed of your service while online (not just the connection)?

Source: Ofcom research, Q1 2013

Base: Adults aged 16+ with a fixed broadband connection at home (n = 2548 UK, 294 Wales, 1562 England, 341 Scotland, 351 Northern Ireland, 140 Wales urban, 154 Wales rural, 386 Wales 2008, 527 Wales 2009, 604 Wales 2010, 303 Wales 2011, 318 Wales 2012, 294 Wales 2013)

Note: Figures above chart columns indicate the proportion of people who were ‘very’ or ‘fairly’ satisfied with their speed of service while online