Communications
Consumer Panel
and Advisory Committee for Older
and Disabled people

Panel Defnyddwyr
Cyfathrebiadau
Pwyllgor Cynghori Pobl
Hŷn ac Anabl

The struggle for fairness:
the experience of consumers, citizens and
micro-businesses in remote and rural locations in the UK

SUMMARY REPORT AND POLICY RECOMMENDATIONS

July 2023

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1. Foreword

The role of the Communications Consumer Panel, as the statutory consumer panel for the communications sector, is to represent consumers in this sector – particularly those whose voices are otherwise less likely to be heard by policymakers and industry.

This project looks at the experiences of people living in rural and remote areas, where access to communication services[1] can be more limited than for people living in urban conurbations.

As more and more services move online, the digital divide between communication consumers living and/or working in rural or remote areas and those living in urban areas has become more pronounced. The effects of poor access appear to have been compounded during the Covid-19 lockdowns and communication consumers in rural and remote areas may have been disproportionately impacted.

We found that some rural and remote communities remain without reliable, robust digital connectivity, which the Panel believes should be considered an essential utility for all communications consumers in the UK. The UK Government and the devolved administrations have put in place programmes to address this – Project Gigabit (UK), R100 (Scotland), Superfast Cymru (Wales) and Project Stratum (Northern Ireland) – with access to high-speed connectivity extending into rural and remote areas. However, the roll out is behind the UK Government's manifesto target of nationwide high-speed access by 2025. Instead, the target is now 85% by 2025, with 15%, mainly those in rural and remote areas, by 2030.

The Shared Rural Network (srn.org.uk) offers promise of strengthened mobile connectivity for rural and remote areas, with collaboration between UK Government and four of the UK's mobile network providers to deliver a 4G connection from at least one of these providers to 95% of the UK. This is promising and while we welcome it, reliable connectivity from potentially only one mobile provider will not solve the cost issues many rural and remote consumers face, as they will still be in a position where they cannot benefit from competition between mobile providers for their custom.

Participants in this research appreciated the access they did have to communications services, but some expressed frustration, anger and

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[1] Communication services are defined as landline, mobile, broadband (fixed or wireless, other than a mobile network), pay-TV and postal services.

embarrassment about their lack of connectivity and the numerous daily workarounds required for them to participate in the economy and society via digital communications.

Participants' positivity towards Royal Mail and their local 'postie' as opposed to other parcel service providers highlighted an ongoing reliance on the Universal Service Obligation.

We remain convinced that there needs to be a greater sense of urgency around the digital roll-out which must listen to the needs and requirements of rural communities. Alongside this, clearer communications are needed for rural and remote communities on the options available to them. Underlying this, we believe in continuing to protect the postal service that rural and remote consumers clearly rely on.

Watch the video

The video that accompanies this report evidences the life-changing effects that an improvement in connectivity had for some of our participants: https://www.youtube.com/watch?v=uVZ6RHBY0Yc

We encourage policy makers, regulators and communication providers to consider the need for fairness, equality and inclusivity both in terms of quality of service and pricing across communications and postal services.

We want to help make it a reality for micro businesses – and consumers of all ages and income levels - to flourish in remote and rural locations, using reliable and affordable communications services to enable their participation in the UK's economy and wider society.

We look forward to continued collaborative working to influence change, along with participants of our National Hubs Consumer Advocacy Hubs, Ofcom, DCMS and devolved government stakeholders.

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2. Executive Summary

➢ Experiences of communication services amongst people living in rural and remote communities were, at best, functional for the majority, and at worst very poor. For many, the infrastructure was not in place to enable households and microbusinesses to manage effectively in a digital society.

➢ Microbusinesses are fundamental to sustaining rural employment and the wider community; poor infrastructure and high costs are undermining existing businesses and can be off-putting to start ups.

➢ For some households, poor connectivity was not perceived to be a significant problem as their online needs were not extensive and they accepted poorer service provision as the trade-off for living in a rural or remote location. For most though, the lack of connectivity had a very significant impact on their lives as individuals, families and microbusinesses. Many had to employ a variety of workarounds on a daily basis to manage the demands of living in digital world without proper access.

➢ Political policy interventions have enabled many communities to get connected, and for some individuals and microbusinesses, this has been life changing. The impact of good connectivity can be transformational. However, there are many households that have not been connected and who feel left behind and resentful that they and their families are unable to access services that others, often in similar locations, enjoy.

➢ The lack of connection is having a wider impact on the communities themselves, contributing to their overall decline as people leave and those running businesses are unable to rely on connections. Younger residents can feel left behind because they are denied the same level of access to online education and entertainment as their peers. Many do not see a future life in these locations due to the lack of infrastructure.

➢ For many, there is an overriding sense of unfairness and inequality, not just in how high-speed access is provisioned, but in the way the services are priced. Those with limited access and therefore limited usage pay the same as those who can make full use of the service. However, whilst proportional billing might provide some temporary relief, it does not address the fundamental issue that large numbers of people in these communities not only endure poor connectivity, but the situation is unlikely to improve for at least another five years. The sentiment from these communities is clear – if

governments are promoting digital by default, then there is an obligation to ensure all UK citizens can access those services.

➢ One of the major frustrations is that the infrastructure is often in place and nearby, but the cost of establishing connection to a household/premises is prohibitively expensive, often reaching into the tens or even hundreds of thousands of pounds. This does not seem fair when most households receive the service for free.

➢ This sense of inequality has fuelled questions about the rationale of the roll-out scheme – that it is following the old infrastructure and targeting those who are closest to the exchange and already connected, rather than those who are further away and in greater need. The Universal Service Obligation does not appear to offer an alternative safety net for these communities unless they are, ironically, willing to pay very large sums of money to pay for the infrastructure. As a compromise, many households would settle for one service – fixed broadband or mobile 4G – so long as the service was reliable. There is clear evidence that households or microbusinesses can function, even thrive, on a single reliable service. Currently, many households are having to pay for two unreliable services just to ensure they have some connection when one of the services goes down.

➢ Several communities referred to unused mobile masts, particularly in and around the national parks, and suggested that lack of progress with mobile connectivity was due to a lack of integration between network providers, the local authorities and the national parks. Similarly, several communities had found solutions in wireless broadband and suggested that further rollout of this technology, rather than fibre, would provide a faster solution for communities where the topology of the land would make a fibre upgrade difficult.

➢ People we spoke to suggested that it would be helpful for communications providers to have greater awareness of the difficulties faced by rural communities was suggested – specifically, to put a stop to selling 'up to' speeds and introduce proportional billing by creating packages that reflected actual speeds and usage.

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3. Research Objectives and Methodology

Objectives

The overall aim of this project was to provide a holistic view of how people living in rural and remote communities experience communications services in 2023.

Specifically, the objectives were to:

- Review each communication service used (fixed line, mobile, broadband, pay TV and post) in terms of availability, supplier choice, service quality (speed, customer service, access to repairs), cost and affordability.

- Identify the issues relating to each service and understand the reasons for any difficulties.

- Assess the need for/importance of finding a workaround, how this was managed and the outcome (improvement or not).

- Explore the experience of not finding a workaround and having no / partial service and the resulting impact on quality of life /ability to work.

- Understand consumers' wants and needs from each of these communication services and the impact on consumers' lives if these needs were fulfilled.

- Assess the effect of the pandemic and cost of living crisis on the above, including whether the changes have had to be sustained and the resulting impact.

- Develop a range of community-driven recommendations to inform the Panel's publication next year on improving rural and remote consumers' experience.

Methodology

An independent market research agency, Futuresight, conducted a total of 42 individual interviews across 6 locations in the UK (approximately 7 interviews per location). Each interview was conducted face to face in the participant's home, place of work or somewhere convenient (e.g., village hall, local pub, etc).

The following locations were selected:
- Withypool on the edge of the Exmoor national park
- Rothbury, on the edge of the Northumberland national park
- BaltaSound, Unst, Shetland Isles
- Rural areas surrounding Oban, West Coast of Scotland

- Llanfair Caereinion and surrounding areas, North Mid Wales
- Lower Lough Erne and Enniskillen, Co Fermanagh, Northern Ireland

In each location, the researchers spoke to a diverse range of people with different interests and needs from communication services. These also included microbusinesses, people at different life stages, long-term and short-term residents, and a few people who were vulnerable for financial or social reasons.

The aim was to provide a representative snapshot of experiences and they used an attitudinal matrix when recruiting to ensure they spoke to consumers and microbusinesses who have had positive experiences as well as those who have had difficulties.

The final sample was:

Young People (single)	6
Young People (cohabiting)	7
Families (young children <8 yrs. old)	5
Families (older children 8+ yrs. old)	6
Older People (working / no dependents at home)	6
Retired People (no dependents at home)	6
Microbusinesses (florist, ice cream, catering, equine livery, farming, insurance)	6
Total	**42**

4. Main Findings

Consumers' experiences of communication services

For the vast majority of people, the landline was rarely used, even in households where there was poor broadband or mobile connectivity. For most, this service was seen as an unnecessary cost and work arounds, such as wi-fi calling, were considered better value alternatives.

However, the landline remained an important communication service for a few households, mainly those who were reliant on broadband for calls because they had no mobile connectivity and who had kept their landline as an emergency back-up or for speaking to elderly relatives. Amongst these, there was some concern about their reliance on broadband and the impending copper switch over in 2025.

Similarly, some microbusinesses continued to make use of their landline, but more out of habit than necessity as all of these had sufficient broadband and/or mobile connectivity to use alternative services.

"We've been using the landline to talk to Head Office ever since we started and that's the way we're used to. We could use our mobiles or, now we have fibre into the business, we could go voice over IP. We still use the copper wire, but we don't need to and should probably move over."
*(*Microbusiness, Shetland Islands)

Royal Mail were almost unanimously praised – for their reliability, consistency of service and longstanding, friendly staff. This contrasted with the mixed reactions to private delivery firms, who could run into significant problems with drivers unable to find an address in a postcode that covered a wide area. For some households, additional charges and longer delivery times were expected due to their remote location. For others, this was a source of frustration, as these households did not consider themselves in a remote area and felt unfairly singled out for additional charges.

Connectivity (fixed/wireless broadband or via mobile network)

Consumers' experiences of communication services – both positive and negative – were principally concerned with access to the Internet – the better the access, the better the experience, and vice versa. Postal services tended to be seen as separate, although experiences of courier services were often

tied to connectivity, with drivers often struggling to find the right address and unable to call due to lack of signal.

This focus on connectivity was due to the essential need for online access – for accessing public services (digital by default), and, increasingly, other services such as banking, healthcare and, most recently, education (the impact of lockdown on online learning appears permanent).

However, the infrastructure in many rural and remote communities is not in place to support this digital shift properly. The problem is exacerbated by a decrease in local offline services, particularly in rural and remote areas, resulting in the need to travel long distances to access services in person.

This has resulted in extremes of experience for some households and microbusinesses although many experience something in between.

The sample can be roughly divided into three types of consumers:
- **Unconnected and Struggling**
- **Onboarded and Coping**
- **Connected but Constrained**

Group 1: Unconnected and Struggling

Approximately a third of the sample, these consumers experienced very slow broadband speeds, limited or non-existent mobile connection inside or outside the home, and varying standards of delivery services from independent couriers (as opposed to Royal Mail). All of these consumers were significantly affected by the lack of connectivity and had to employ a series of workarounds almost every day to manage their everyday lives.

Experiences amongst the Unconnected and Struggling households were particularly difficult, with very significant impacts on:

- **Family life**: frequent arguments, rotas imposed, schoolwork disrupted, entertainment curtailed, socialising limited.
- **Working from home**: very problematic, leading to feelings of shame, embarrassment and concerns about appearing unprofessional; having to make other arrangements which often involved long distance travel.
- **Accessing services**: in particular, government services and healthcare.
- **Costs**: paying same prices as those receiving a full service, no proportional billing.

- **Access to support:** The Universal Service Obligation does not apply to these households as they would have been required to contribute enormous sums of money to be connected.

Case Study #1
James is 19. Throughout lockdown, he lived at home in a rural village with his parents and younger sister, as he studied for his A-levels.

James' fixed line broadband speed is less than 2 Mbps and he has no mobile connection in the house or nearby. He attempted to join lectures but was constantly dropping out, so instead he took to books for his studies and went frequently to the tea rooms in the village, where there was high speed internet access. He also had to get away from the constant rows with his teenage sister who wanted to get on social media at home. Their mother is a teacher and has to work at school late because she can't complete her work at home.

James is frustrated because he feels he has lost out on what could have been a really productive time simply because he doesn't have the access that other friends have. A talented musician, James wanted to collaborate with other musicians and develop an online music library, but he couldn't due to the upload speeds. In other parts of the village, there are good access speeds, he can even see the fibre box just from his house, and there is a mast on the hill that was installed 2 years ago but has not been switched on.

James likes where he lives, but questions whether he will return after university because the lack of connectivity and the constraints this puts on his life.

Case study #2
Susan is in her 30s and has moved to Northumberland with her two children, a 12 year old and a 6 year old. She has a job in the care sector in the NHS, for which she is required to attend meetings and sometimes give presentations online. She is financially vulnerable and suffers from anxiety and low confidence. Her internet speed is around 8 Mbps on a good day and her mobile reception is non-existent in the house and surrounding areas.

Susan finds attending meetings online stressful as she often falls behind or drops out. She gets the impression that her work colleagues think she is a bit useless and unprofessional because of her poor connection. She sometimes travels 45 minutes to the local town 12 miles away to ensure she has a good connection for important meetings. Her children have good internet access at school but not at home, and get upset when things don't work and their mother can't fix the problem. She worries that her children are falling behind

at school because they are sometimes unable to complete their assignments. She is also concerned that her son is becoming increasingly isolated, unable to socialise through gaming and other online activities.

On a low income, Susan is frustrated that she pays the same amount as people who get faster internet access and doesn't like customer services reminding her that the service is 'up to' 75 Mbps. She feels she is being cheated and would like to receive billing that better represents what she actually uses.

Postal deliveries can be difficult because there is no mobile reception and the postcode covers a wide area. She uses the community Facebook to help her find her parcels which have been dropped off in random places. Every day, she makes sure that she is always in a spot where there is reception at end of the school day, and she coordinates with her friend to ensure neither of them is in an area with no signal at the same time if the children are not with her.

On reflection, she sees each day as a 'life hack', having to adapt to lack of internet access and mobile reception so she can meet the needs of her work and children.

Group 2: Onboarded and Coping

About a third of the sample, this segment contained a mix of broadband only users (with no mobile reception), combined broadband and mobile 4G users, and some mobile-only users. Consumers in this segment, both residents and microbusinesses, had some connectivity but either employed various workarounds to enable them to function, or endured services that were often constrained.

The Onboarded and Coping households tended to have enough connectivity to function, but there were significant issues too:
- Reliance on community action to secure funding / government voucher schemes.
- Constraints on limiting streaming / entertainment sometimes in place so as not to overload the network.
- Service disruption due to poor weather raised concerns if working from home.
- Additional costs incurred by doubling up with broadband and 4G mobile connection to manage network unreliability.
- Managing stress, anxiety and frustration due to unreliability of the network – in particular meeting government service deadlines with fines imposed due to late / non-submission of forms.

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- Service often limited to a single supplier, leaving consumers open to higher prices and/or potential loss of service with no alternatives.

Case Study #3

Leslie moved into the area 15 years ago to build a new house with her husband. They discovered there was just an old copper wire connection and no mobile connectivity, and they were unable to manage the new build without some connection.

Leslie and her husband looked into different options and ended up working with a business 12 miles away, using the business connection to bounce signal to the village. They set up a community broadband service for the village and have run it themselves ever since. Everyone pays a £250 set up fee, and then £25 a month for a 20 Mbps service. The service isn't the most reliable as it can drop with bad weather, but it has meant everyone in the village does get some service, including two elderly ladies who have been helped by people in the village to learn how to order their groceries online. The mobile signal is still very poor, but they can run the phones through the broadband at home using wi-fi calling.

Everyone in the village is asked to abide by the same rules and not use the broadband for heavy downloads and to limit streaming TV to a certain limit. Leslie's children visit but will not move back because they cannot run their businesses without proper connectivity.

The lack of mobile connection is very frustrating for everyone in the village, as there is a mast within sight, but it hasn't been in use as there is, reportedly, some disagreement between the network operators. Depositions to the council have been made but with no result.

Case study #4: Microbusiness

Sue runs a farm, employs 6 staff, produces ice cream and runs a tea shop. She also works as a consultant in the charity sector. She has fixed line internet in the house, which is slow, and she also has a 4g router which works well outside the house and runs the farm shop till. However, it doesn't work in the house. Her day starts at 6am as this is the best time to use the Internet, after 3pm it's useless. She is conscious that she organises her day around when there is the best connectivity. Funding proposal deadlines tend to close at midnight, however, and this can prove very problematic. She finds connectivity issues very stressful – having to register calves, meeting funding deadlines, paying staff – because she doesn't know if the submission has gone through. She's missed registration deadlines, making her feel a bit useless, when she knows

it's a simple process and only fails because of the connection. Openreach has dug up her farm and yet she's not connected to faster speeds – she thinks it's a political stunt, rather than actually putting in high speed access and helping the communities. Overall, she feels divided on the issue - on the one hand she doesn't want to think about technology; on the other, she wants her business to thrive, be competitive, be able to communicate with her customers and to employ people, but this can't happen without proper infrastructure. Her sons, who love where they grew up, will not come back to live because the infrastructure is not in place to run their businesses (photography, gaming). She also hates being charged extra for deliveries when she's only 14 miles from the local town and they can never find her anyway as her postcode covers a large area. In contrast, she loves the postman, who has been part of the community for years.

In some locations, where broadband service was poor and mobile 4G was accessible, a few consumers and microbusinesses, had moved solely to the mobile network. However, such a move had its own issues, reliability of service was a widespread issue, as well as the lack of choice of network operators.

Case study #5
Jason is in his twenties and works for the local energy company as an engineer fixing wind turbines in remote locations. He grew up in a remote part of the UK and has always endured poor connectivity. He doesn't subscribe to fixed broadband because it is so slow and not worth the money and just relies on the mobile network. He doesn't subscribe to the main mobile operator because the mobile phones they offer are expensive, and he wants the best model he can get. The network he uses only works in certain areas so he has had to trade off a good phone in exchange for poor connectivity.

Jason finds it frustrating that the infrastructure for high-speed internet is in place for public services, but not for residents. He feels he is missing out on social entertainment online, such as gaming with his friends. He lives with his girlfriend and they take it in turn to stream television when the signal permits, however the operators cap streaming data (even when the service is unlimited). It's not possible to use the phone when the TV is streaming. He's been to other countries, less developed than the UK, which have much better connectivity and feels resentful that his friends who live only an hour away are much better served.

Jason is a member of the voluntary fire service, and they have to use pagers because the network is not reliable enough. He finds it frustrating that he can't operate as he wants because none of the operators want to invest in the mobile infrastructure. He also feels held back in his work as he's unable to do

video calls which are usually the first step when applying for a job. He doesn't accept that there is a price for living in a remote area as he feels good connectivity should be available to everyone in 2023.

Group 3: Connected but Constrained

Roughly a third of the sample, these consumers and microbusinesses had good connectivity with one service (broadband or mobile 4G) and were able to function, albeit with some constraints. For most households, this was sufficient for almost all functions - accessing services, schoolwork, entertainment, etc. Similarly, microbusinesses could manage with a single reliable service, although no mobile connectivity in or around the house could lead to delays in responding to new business enquiries and potential loss of business.

Case Study #6

Tony is a retired police officer. He lives in a rural area with his wife on the edge of the national park, about 30 miles from the largest conurbation in the North East of England. He does not consider himself living in a remote area and compares his situation to people living in Iceland who have high speed access across the country.

Two years ago, Tony started an open university course, but his internet access was so poor that he had to travel 12 miles every day to a library to study. He was falling behind so much that he was about to give up. Then a local company put in wireless broadband access to his small community and everything changed. He immediately gave up his landline to reduce costs and now enjoys 50 Mbps, which allows him to stream TV, communicate with his family via wi-fi calling and complete his studies online.

Tony has just started an online Masters course and is one of the leading researchers on local wildlife. He carries a satellite device with him when he is out on the moors for safety reasons as he cannot trust the mobile network. He is a passionate believer that rural communities should have better services and residents should receive proportional billing, relative to the service they actually receive. He thinks residents are unable to properly participate in modern life without good connectivity.

Case Study #7

Sarah is married, and a mother of two teenage girls living on the edge of a national park. They have a good broadband connection, but no mobile reception in and around the house.

Throughout the lockdowns, the girls were able to do their homework, engage in school life, stream TV and generally engage online fully. Sarah uses wi-fi calling in the house, which works well. She used to have real problems with 2-factor authentication, having to climb a hill to receive the authentication code, but recent changes in technology have meant she can receive the authentication code via wi-fi, which has opened up more opportunities for her to purchase items online.

Sarah finds the lack of mobile connection frustrating, but is accepting that not everything is perfect and there is a trade-off for where she lives. She acknowledges that she only thinks like this because she has good broadband connectivity and the household can function. With no mobile connection, she does have concerns about safety when her children grow up and want to move around the area.

Case Study #8
Simon runs a catering business, based on the edge of a national park. Before buying his house, he made sure that there was a decent broadband connection and would not have moved there otherwise. The broadband service is fast enough to run the business; however he feels the business has been impacted by the lack of mobile connection. Customers like to use the mobile number to get in touch, however, if he is not at home using wi-fi calling, he can miss the call and only receives notification when he gets a connection. He believes he loses business to his competitors if he doesn't respond immediately.

Simon is part of a local community group lobbying for better mobile connectivity, and is frustrated that there is a mast in the village but it is not used. He believes the National Parks are more concerned about attracting visitors and restricting use of masts for visual aesthetics, than they are interested in looking after the residents. He has tried to run an e-commerce business, but had to change business model as it was not possible to operate a same day delivery service, as the couriers charged too much and the post office only has one collection per day.

Simon accepts that businesses located in rural environments need to adapt their model to the location (and services offered), but he feels that good connectivity – both mobile and broadband – are an essential part of modern life, and he needs good infrastructure to be competitive.

Case Study #9
Andy runs a horse livery business and, due to recent upgrades on the network, he is able to run his entire business over mobile 4G. Prior to the upgrade, he

was running fixed broadband and mobile 4G, which was slow, intermittent and required numerous workarounds.

Andy looks after grand prix horses for his clients, but he is also involved in selecting new horses for purchase, as well as overseeing the foaling process. He does this all remotely using different apps that enable him to communicate as well as review horses / foaling remotely via clients' cameras and the 4g network. This upgrade in technology has enabled him to expand his business, as he can do so much more remotely, rather than having to travel to his clients to see the horses. His business has trebled in size since the upgrade and he is now moving into new premises to be able to accommodate more clients and horses.

Andy is looking forward to upgrading to 5G as this will give him better speeds, but, overall, he is happy that the connection uptime is good and reliable.

Case Study #10
Mark finished his Masters degree before lockdown and returned home to a house with very poor broadband and no mobile connection. He worked at the local holiday park, but was trying to look for a job that was connected to his degree. He found it almost impossible to look for jobs, as he was always behind the deadlines, as well as being unable to conduct remote video calls. He would have to go to his friend's house 4 miles away, but that was not always possible, and petrol is expensive.

Mark loves football, but he was unable to watch at home and had to go to the pub, which wasn't always convenient and was expensive. The connection was so bad he was missing emails and calls from work, making him look unprofessional. He felt he was being left behind and lost three years in the job market and felt others leaving university after him had overtaken him.

Mark was very frustrated and starting to feel very down, and about to leave home and head to the city to find work. One day he spotted fibre network vans and decided to sign up. He can now stream TV, conduct work online and feels he is now competitive with his peers - the recent upgrade has completely changed his life.

Mark is now able to stay in the area he grew up, which is what he wanted as he says he is not a 'city type' and he didn't want to be forced to go to the city to find work.

5. The Panel's Recommendations:

1. **Lack of access to internet and mobile connectivity is preventing people in rural communities from fully participating in the digital economy and society**
Reliable digital connectivity is becoming a basic necessity for people to function in the economy and society. A lack of access has a disproportionate impact both economically and socially for rural communities and is contributing to younger people moving away from their home areas to move to areas with better connectivity. The promotion of digital by default public services means there is an obligation for the UK and devolved governments to ensure all UK citizens can access those services.

2. **Greater urgency and subsidy**
Greater urgency needs to be given to the fibre-optic roll-out and, where necessary, the cost of extending the network to isolated communities needs to be subsidised at a higher level than is currently delivered. The UK and Devolved Nations Governments urgently need to increase the rate of the national digital roll-out and improve access to voucher schemes and consider the effectiveness of existing voucher schemes in delivering the outcome being sought.

3. **Listen to the needs of rural micro businesses and support them in delivery to their community and other UK consumers**
The lack of access, speed and reliability is having an adverse impact on microbusinesses in rural and remote areas. These businesses are fundamental to sustaining rural employment and the wider community. Poor infrastructure and high costs can undermine existing businesses and be off-putting to start ups. It is vital that the voice of micro business owners is listened to by Government and Ofcom so that rural and remote communities can flourish and consumers across the UK can benefit from access to services and products provided by these businesses, promoting healthy competition in choice and pricing for consumers.

4. **Improve communication between rural consumers, citizens and micro businesses and those who have the power to improve their connectivity**
Communication between those with the power to invoke change and people living and working in rural and remote areas needs to be stepped up. This should be led by UK and devolved governments and Ofcom, also requiring Openreach to engage with local people. Consumers in rural areas should be

made aware of connections being put in place in their local area (including those from smaller less well known providers) and ways they can sign up, including voucher schemes

5. **Protect rural consumers from the failure of their small broadband provider/alt net**
Due to the way the communications market operates, larger providers are less likely to bid to serve rural and remote areas, as they are less profit-yielding and more complex to serve. For some participants, access to reliable broadband had only been possible due to a smaller provider operating in their area. However, in the current economic climate, the risk of a smaller provider becoming insolvent and leaving an entire village without connectivity is too high. Ofcom should monitor the situation and ensure a mechanism is in place to protect communities that lose connectivity service due to their provider ceasing to trade.

6. **Make standards clear and accessible to consumers, citizens and micro businesses**
Codes of Conduct and other rules, standards and principles under which communications providers (for example, broadband, 'alt net' and mobile providers) are expected to operate should be clear and easy for consumers to find and understand.

7. **Offer proportional billing and automatic compensation**
Participants in our research relied so heavily on remaining connected that they 'doubled-up', paying for the highest broadband speeds as they could afford, to try to ensure a reliable connection, as well as paying for mobile data to cover them if broadband failed. As an interim measure, broadband providers should find ways to offer proportional billing - charging residents for the speeds that they can actually access rather than theoretical and unobtainable 'up to' speeds. All providers should offer automatic compensation, in line with Ofcom's automatic compensation scheme.

8. **Use existing infrastructure more effectively to deliver connectivity within National Parks**
Existing mobile phone masts need to be more effectively utilised, with better co-ordination between mobile network operators, local authorities and national parks.

9. **Ensure that the Shared Rural Network delivers what is needed**
UK Government and Ofcom should ensure that the Shared Rural Network meets the needs of consumers in rural and remote areas, considering not just safety, but everyday life and work.

10. **Introduce National/Domestic Roaming**
    Consumers entering rural and remote areas that are only connected via one mobile network currently lose connectivity other than in hospitality settings that offer Wi-Fi. This is impractical given that many rural and remote businesses are not able to connect to broadband. UK Government should ensure that consumers that subscribed to other UK mobile networks have access to connectivity in remote and rural areas, by reconsidering National/Domestic Roaming – enabling the consumer's SIM to 'roam' onto the local network.

11. **Ensure rural and remote postal services are safeguarded, fair and fit for purpose**
    For many participants, the Royal Mail was a known and trusted 'life-line' and it is important that their commitment to serving rural communities remains and that quality of service continues to be monitored and improved.

12. **Fair and transparent pricing of parcel delivery services**
    Information around parcel surcharging needs to be more transparent – this may require cross-sector collaboration. Retailers should not profit from surcharging rural and remote consumers for delivery and where additional charges are paid, consumers should receive what they are promised – promises such as next day delivery should not be made if they cannot be fulfilled.

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Consumer Panel
and Advisory Committee for Older
and Disabled people