DIGITAL CONNECTIVITY: WHAT MATTERS MOST TO THE UK

Examining priorities for the telecoms sector

2025

ISPA UK

TABLE OF CONTENTS

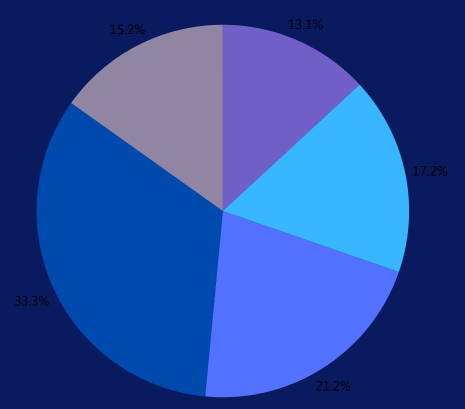
KEY FINDINGS

62% of people accept that short term traffic disruption is a necessary trade-off to provide long-term improvements to broadband access.

72% of people see internet providers continuing to invest in infrastructure upgrades as important.

78% of people believe that it is important for everyone in the UK to have access to fast, reliable internet.

Over half **(55%)** of people think that tech platforms such as social media companies or messaging services are not doing enough to prevent fraud and scams.



Where, if anywhere, do you think the ultimate responsibility lies for online safety?

- The user including parents and/or caregiver (33%)
- Tech platforms including social media companies and websites (21%)
- The broadband provider (13%)
- The government and online safety regulators (17%)
- There is nowhere I think the ultimate responsibility lies for online safety/unsure (15%)

EXECUTIVE SUMMARY

A pivotal moment for the UK's broadband sector

The rapid expansion of internet access in recent years has fundamentally reshaped our society. The ways we engage with each other and participate in the economy and society has been shaped for the better by the ongoing digitisation of the public and private spheres, all of which has been made possible by investment into and rollout of digital infrastructure.

This report, published to mark the 30th anniversary of the Internet Services Providers' Association (ISPA UK), arrives at a pivotal moment for the UK's telecoms sector. Over the past three decades, broadband has underpinned much of the UK's technological progress. Since ISPA UK's founding in 1995, internet usage in the UK has soared from just 1.9% of the population to 97.8% in 2025. Simultaneously, the UK has established itself as the top tech ecosystem in Europe, with an estimated value of over $1 trillion, behind only the USA and China.

Yet, ensuring that everyone benefits from these advances remains a work in progress. We are entering the final and most complex stage of one of the most significant and successful infrastructure projects in recent memory. Largely privately funded, the UK has seen a rapid increase in the number of households connected to future-proof networks, with 84% of residential and commercial properties now able to access gigabit-capable broadband and 74% full-fibre broadband.

However, connecting the length and breadth of the UK – from Lands End to John O'Groats – remains a challenge. The current political and economic environment makes raising additional capital to carry out this essential work increasingly difficult. At the same time, ISPA UK members are being asked to shoulder greater responsibility for what actually happens online, whether that be affordability, online safety, digital skills, or fraud.

Drawing on new, nationally representative polling, this report explores how the British public perceives these issues and explores what that means for policy going forward.

Steve Leighton, Chair of ISPA

INTRODUCTION

ISPA UK was founded in 1995 to represent and advance the interests of the UK's internet service providers (ISPs), acting as a bridge between industry, government, and the public. Back then, the nascent industry was largely the preserve of academics and experts, and a body was needed to represent new organisations to policymakers, the media and the public. Over the past three decades, we have seen the telecoms industry in the UK progress from dial-up modems, slow speeds, and limited coverage, to one of the most ambitious and competitive full-fibre rollouts in Europe, with over 100 different operators now involved in transforming our communications infrastructure.

Since the mainstream commercial availability of the internet around thirty years ago, the market has developed and grown to become a real success story. Today, ISPA UK represents a highly competitive market, with hundreds of providers ranging from household names to smaller, specialist firms. These organisations cover the full spectrum of the UK's connectivity needs, from dedicated business providers that power the modern economy, to a diverse mix of infrastructure builders at national, regional, and local levels, and the consumer providers that power internet access in homes across the country. Their technological innovation, low pricing, flexibility, and service innovation has transformed the experience of accessing the online world in recent years. It is a sector that moves at pace, and in 2025, as network rollout matures, we are seeing significant consolidation. As a result, the landscape of the sector is likely to be quite different by the end of this decade.

Broadband's evolution has fundamentally reshaped how we live, work, learn, and access vital services. The deployment of next-generation fibre networks has been essential to this transformation, with industry investing between £3bn and £6bn each year in this project. A further £5bn has been committed by the Government through its Project Gigabit programme, aimed at facilitating rollout in the most rural areas of our nation.

INTRODUCTION

The significance of this achievement extends well beyond technical milestones. Broadband underpins everything from remote work and digital healthcare to online education and social inclusion. For businesses, it is the foundation for adopting advanced technologies such as artificial intelligence and cloud computing - tools that are becoming ever more integral to competitiveness and productivity. Connectivity underpins the vital technological growth areas of today, and will be of even greater importance in the years to come as we see more data-heavy technologies of tomorrow.

Yet, the journey is not complete. We now face the challenge of connecting the most difficult-to-reach areas, at the same time as the telecoms sector is under more pressure than ever before. Responsibilities for online safety, combatting fraud, and bridging the digital divide, among others, add to existing demands for rollout and improved customer experience.

This report draws on new national polling data to examine how the public perceives these evolving roles and responsibilities, and what this means for the future of broadband in the UK. In doing so, it aims to inform policy and practice at a time when digital connectivity has never been more central to the nation’s growth.

SECTION ONE: INTERNET ACCESS IS MORE IMPORTANT THAN EVER

As the UK enters the final phases of full-fibre broadband rollout, reliable internet connectivity has become a social and economic necessity, supporting every aspect of our professional and personal lives. Expectations on the sector continue to rise, with additional pressures to ensure that consumers can not only access the internet, but do so affordably and safely.

Broadband as an everyday essential

High-speed internet is now seen as vital for participating in today's digital-first society. Our polling reveals that over three-quarters of the British public consider access to high-speed internet important. The impact of potentially losing this access is significant; almost half (44%) of respondents report that this would impact their ability to contact friends and family, while 40% would struggle to access essential services such as healthcare. A further 32% state that working or studying would become impossible without a home broadband connection.

As society becomes more digital, our reliance on the internet will only grow. We have seen this particularly with regard to healthcare recently, as the government targets moving our NHS from "analogue to digital" in a series of reforms aimed at digitally transforming the health and social care sector. Equally, the trend towards greater remote working, with nearly half (41%) of UK employers now permitting a hybrid working pattern, has increased demand for consistent, high-speed broadband access in the home.

These changes have made broadband a higher priority for many households. When asked what they would rather forgo over internet access, almost half (49%) of respondents chose the gym, less than half (42%) said alcohol, and a quarter (25%) would forgo coffee or tea.

In terms of value added to consumers' daily lives, only the supermarket ranked consistently higher than broadband in our survey. Broadband was the second highest priority (37%), ahead of utilities like gas, water, and electricity (36%), mobile network providers (30%), and banks (29%). This marks a decisive shift: broadband has become not just a convenience, but an essential part of everyday life.

Connectivity is the bedrock of our digital society

Our research confirms that digital connectivity has assumed a nearly unparalleled level of importance in modern society. Access to high-speed internet, which is capable of everything from large-scale uploads and downloads or multiple devices conducting video calls, is no longer simply a matter of convenience, but rather a requirement for participation in an increasingly digital society. The public's willingness to prioritise broadband above many traditional household necessities underscores its importance for daily living, economic productivity, and social inclusion.

There is also strong public support for completing the rollout of high-speed broadband, especially to underserved communities. The Covid-19 pandemic served to highlight how existing inequalities can be exacerbated by a lack of access to reliable connectivity, and that this must be central to any plan to create a more equitable society. Reliable broadband is now foundational, not just for individual opportunity, but for vital services like healthcare, education, and remote work.

While some findings are light-hearted, revealing that consumers would sooner go without a pint or a gym session than lose broadband connectivity, they reinforce a serious message: our dependence on digital infrastructure is profound. Connectivity is deeply woven into the fabric of everyday life, with any significant disruption posing a risk not just to individuals, but to the smooth running of society and the economy as a whole.

Recommendation: As the country transitions to full-fibre, ensuring the UK's digital future for generations to come, the government must support the industry by raising awareness of the benefits of fibre, and ensuring the regulatory regime and government policy moves fast to overcome barriers to rollout and minimises the risk of future barriers emerging

SECTION TWO: INFRASTRUCTURE UNDERPINS OUR DIGITAL FUTURE

As noted above, gigabit-capable broadband rollout in the UK has been one of the most ambitious and successful infrastructure projects of recent decades. Providers in the UK connected 4.2 million homes in the year to September 2024, making the UK the fastest growing fibre market in Europe. However, the next phase presents the toughest challenge yet: extending coverage to the approximately 5 million ‘hardest to reach’ premises in the country, mostly in rural areas.

Let them have broadband!

Public support for ongoing investment in digital infrastructure remains strong. Nationally, 72% of respondents believe that broadband providers should continue to fund rollout, with support rising to 81% among residents of large cities, where a larger concentration of economic activity relies on good connectivity. As such, there is a general consensus that improved connectivity is an overall public good.

Despite this support, just over half (53%) of respondents are aware that the UK’s broadband infrastructure is currently being upgraded to full-fibre.

As with many policy issues, while people value improved connectivity, they aren’t too concerned with the exact details of how it happens; rather, they are looking for internet access that works at the point-of-use, and is fast enough to meet modern demands.

In a similar vein, the public aren’t overall too concerned about the temporary disruption required for infrastructure deployment to succeed. Nearly two-thirds of people (62%) agree that short-term road traffic disruption is a necessary trade-off for long-term improvements to broadband access. Support for this view is again highest among residents of large cities (68%), compared to rural residents (62%), challenging the perception that rural opposition is much higher.

Further breaking down the data reveals that there are some local differences in awareness and acceptance. Greater London leads in awareness, with 42% of residents aware of both the full-fibre upgrade and the building works required. This is consistent with the pace of rollout in the area, with 92% of premises able to access gigabit broadband and a further 75% full-fibre. Conversely, more rural areas lag behind. In the South East, for example, nearly half (48%) are unaware of any aspect of the upgrade. While rollout has been slower in this area, with gigabit speeds available to 85% of premises and 73% full-fibre, coverage is in reality not far behind London. This suggests that awareness often lags behind actual rollout, particularly outside urban centres.

Rollout facilitates the UK's growth ambitions

The data provides a compelling endorsement of the broadband industry's role in building the UK's digital future. With strong public support for continued infrastructure investment, high-speed connectivity is widely viewed as a public good. Notably, there is a "silent majority" who support further rollout even if they are not fully aware of the technicalities or the ongoing works involved.

For policymakers, this means that while critical voices and local concerns must be taken seriously, they should not dictate the overall pace or scope of rollout. The data show that most people accept short-term disruption for long-term gain, and that objections — while worth addressing — should not become unnecessary barriers to progress.

The findings also underscore the importance of consistent and considerate communication. Awareness tends to be higher in areas with the fastest rollout, but significant knowledge gaps persist, particularly in rural and slower-to-connect regions. This points to the need for industry and government to create accessible and tailored information that engages every community. Recent initiatives, such as ISPA UK's pole siting best practice guidance, are an example of how targeted communications are needed to demystify the rollout process and encourage greater public support.

Ultimately, our survey highlights that the UK's digital infrastructure ambitions enjoy widespread backing and are essential for the country's future competitiveness. Ensuring that rollout projects deliver for all will be crucial in maximising their benefits and maintaining public trust.

Recommendation: The government must reaffirm its commitment to supporting the rollout of future-proof digital infrastructure via Project Gigabit to connect more homes and businesses to gigabit-capable broadband to reach government's target of 99% of UK premises by 2032.

SECTION THREE: CLOSING THE DIGITAL DIVIDE — A NATIONAL ISSUE WITH SHARED RESPONSIBILITY

Rolling out full-fibre infrastructure is a crucial first step toward the UK's digital future, but it raises an equally important question: how can we ensure that everyone can, and wants to, access online services?

While this is being addressed through the government's Digital Inclusion Action Plan, which identifies four pillars: skills, access, barriers and confidence – our research reinforces the importance of addressing this issue on a local level, and that the responsibility must be taken in partnership.

Tackling barriers to access

Our findings confirm that access to connectivity is no longer seen as a privilege, but a fundamental right. This reflects its embedded role in economic activity, education, healthcare, and social life. Support is highest at 84% in large cities, but significant regional disparities remain.

Notably, just 65% of those in the North East see access to connectivity as a priority, with neighbouring regions like Scotland (83%) trending higher than the national average (78%).

This is particularly interesting when read in comparison with rollout figures; Scotland's full-fibre rollout has been the slowest of the four regions that make up the UK (currently at 70%), yet public demand for better service is strong.

While support for universal access is widespread, public opinion is divided on who should bear the responsibility for this. 41% of respondents believe that the national government should take primary responsibility, with a near equal proportion (40%) placing this duty on broadband providers. Almost a quarter (23%) of Brits place this responsibility on local government.

Government and industry must lead the charge in partnership

This split in public opinion presents an opportunity for genuine partnership between government and industry.

Historically, the telecoms sector has made significant strides in acknowledging and acting upon this responsibility. Industry-led initiatives on skills and device donation, as well as the provision of free or significantly subsidised connectivity (such as social tariffs), demonstrate that providers often stepped in where government action was lacking. However, our research suggests that sector-led efforts alone are not enough. There is a clear expectation for the government to play a more active role.

The Digital Inclusion Action Plan provides much-needed strategic direction, funding, and coordination of current and future initiatives. Our data shows that those lacking reliable connectivity are especially aware of being left behind, and are supportive of ensuring everyone has access. The results also support empowering local authorities to spearhead tailored initiatives: some regions may need infrastructure investment (often through Project Gigabit), while others, where networks exist but awareness is low, would benefit more from targeted communications campaigns or skills programmes.

The Plan and its current initiatives acknowledge the scale and complexity of the challenge, but progress remains uneven. If the ambition is to ensure that no one is left behind in the digital age, then a new partnership model is needed; one that combines the sector's innovation and operational capacity with targeted public funding and strategic oversight.

Overall, this report indicates that there is widespread public support and desire for digital connectivity, and as such there is room for the government to be much more ambitious and take bolder action in bridging the remaining gaps.

Recommendation: A shared responsibility for digital inclusion means the government must show leadership and deliver on its end to coordinate, fund and deliver a skills policy agenda suitable for the digital age.

SECTION FOUR: BUILDING A SAFE AND SECURE ONLINE ENVIRONMENT - CONFRONTING THE EVER-INCREASING THREATS

Ensuring a safe and secure online environment is not just vital for encouraging digital inclusion, especially among those who remain excluded, but also for maintaining public trust in the internet and online discourse.

Reflecting the complex nature of online safety policy, the Online Safety Act finally became law in October 2023, after years of consultation and debate. Since its ascension, Ofcom's implementation approach has been staggered, in part due to a lack of clarity around responsibility. Meanwhile, maintaining consumer confidence in the internet also requires alleviating the impact of fraud and scams. These are a pervasive threat to consumer trust, with UK citizens losing £11.4 billion to scams in the 12 months preceding November 2024, a £4 billion increase on the previous period. The government has sought to address this through the ongoing development of the Second Telecommunications Charter and an upcoming revamped Fraud Strategy.

Who is responsible for online safety and tackling fraud?

Policy-wise, there is not a simple answer to tackling online safety and fraud, as the issues are highly complex and nuanced. Our research shows that public opinion is divided on where responsibility lies. One-third (33%) of respondents believe that users, including parents and caregivers, should take primary responsibility. Others assign this duty to tech platforms (21%), government and regulators (17%), or broadband providers (13%). This reflects a shift over the past 30 years: responsibility has moved closer to the platforms that facilitate online interaction, rather than the providers who supply access.

Approaches to managing online safety also vary considerably. 22% of respondents report using parental controls provided by their broadband provider, while 21% install safety software independently and 20% prefer direct supervision of children online. Uptake of these measures is highest in Greater London and other urban centres, but lags in rural communities, where 12% report not taking any steps to manage online safety.

Our polling also reveals the scale of online fraud: over half (61%) of people in the UK have experienced some form of online fraud or scam. Perhaps contrary to popular belief, younger populations, generally assumed to be more digitally literate and thus better prepared to recognise and avoid fraud, are more likely to report exposure. Only 13% of 18-24 year olds and 23% of 25-34 year olds reported having never experienced online fraud, compared to over half (55%) of those 55 and older. This is concurrent with wider research, which suggests that 92% of young adults aged 18-34 have encountered online content they suspected to be a scam or fraudulent; the highest rate among all age groups.

When it comes to accountability for tackling fraud, public opinion is again divided. Social media and messaging platforms are seen as bearing the greatest responsibility (35%). And, despite the central role that tech platforms, including social media and messaging services, hold in hosting many fraudsters and scammers, over half (55%) of respondents do not feel they are doing enough to prevent fraud and scams, while only 34% feel that current measures are adequate. National government (29%), individuals (27%), and banks (26%) are also seen as key players. Fewer than a quarter (24%) hold broadband providers primarily responsible, ranking them just above local government and "no-one in particular."

Coordinating industry and government action

On a technical and legal level, tackling both online safety and fraud necessitate collaborative action from the government and industry, and it is clear that the public understands this. Our findings reveal that there is no consensus on which organisation or sector should bear ultimate responsibility; rather, government must work alongside and coordinate work between telecoms, banking, online platforms and the broader tech sector in order to address these issues.

The ISP sector understands its responsibilities in the online safety and fraud space. For decades, ISPs have taken the initiative, even before the Online Safety Act, to combat child sexual abuse material (CSAM) and set up the Internet Watch Foundation (IWF). Additionally, most providers offer parental controls, which allow users to set restriction levels and filter various categories of online content. ISPA UK also continues to engage with government and regulators such as Ofcom on this matter. This is reflected in the finding that only 13% now see ISPs as chiefly responsible for online safety, a significant shift from the days when ISPs were seen as the main "gatekeepers" to the internet.

On fraud, ISPA UK members invest significant resources, both financial and time, to tackle fraud from both a technical perspective and through consumer education. Members already comply with existing regulations such as Ofcom's General Conditions of Entitlement, but many go further voluntarily. ISPA's members continue to work with the government, including through the development of the Second Telecommunications Charter and the Joint Fraud Task Force.

Ultimately, our survey results indicate a clear desire from the public that the rest of the chain step up their efforts to create a safe and secure online environment. Given how multi-layered the value chain is with accessing the digital world, this is the most effective approach to protect users and maintain trust in all impacted sectors.

Recommendation: We encourage the government and Ofcom to continue to collaborate with ISPs and other sectors to create and implement an effective and proportionate online safety regime.

SECTION FIVE: REDEFINING BROADBAND FOR AN INCREASINGLY DIGITAL FUTURE

As broadband becomes an even greater priority in consumers' lives, expectations are evolving rapidly. People no longer look to their ISP merely for reliable connectivity, but are beginning to seek out a broader range of integrated services that support security, convenience, and diverse digital lifestyles.

A changing market landscape

Our data shows that 35% of consumers are interested in purchasing security and safety products from their ISP. A further 29% express interest in smart home equipment such as video doorbells and connected thermostats, with the same share valuing entertainment packages. While these numbers are relatively low for now, they represent a growing market opportunity as ISPs diversify their offerings.

Preferences for additional services reflect expected generational trends. Younger adults (18–35) prioritise entertainment packages (36%), matching their higher rates of streaming service use; 90% of 18–24 year olds now go straight to streaming platforms, bypassing traditional TV channels. By contrast, older adults prioritise security and resilience: 34% of 45-54 year olds show most interest in smart home equipment, and 35% of those aged 55+ prioritise security and safety products.

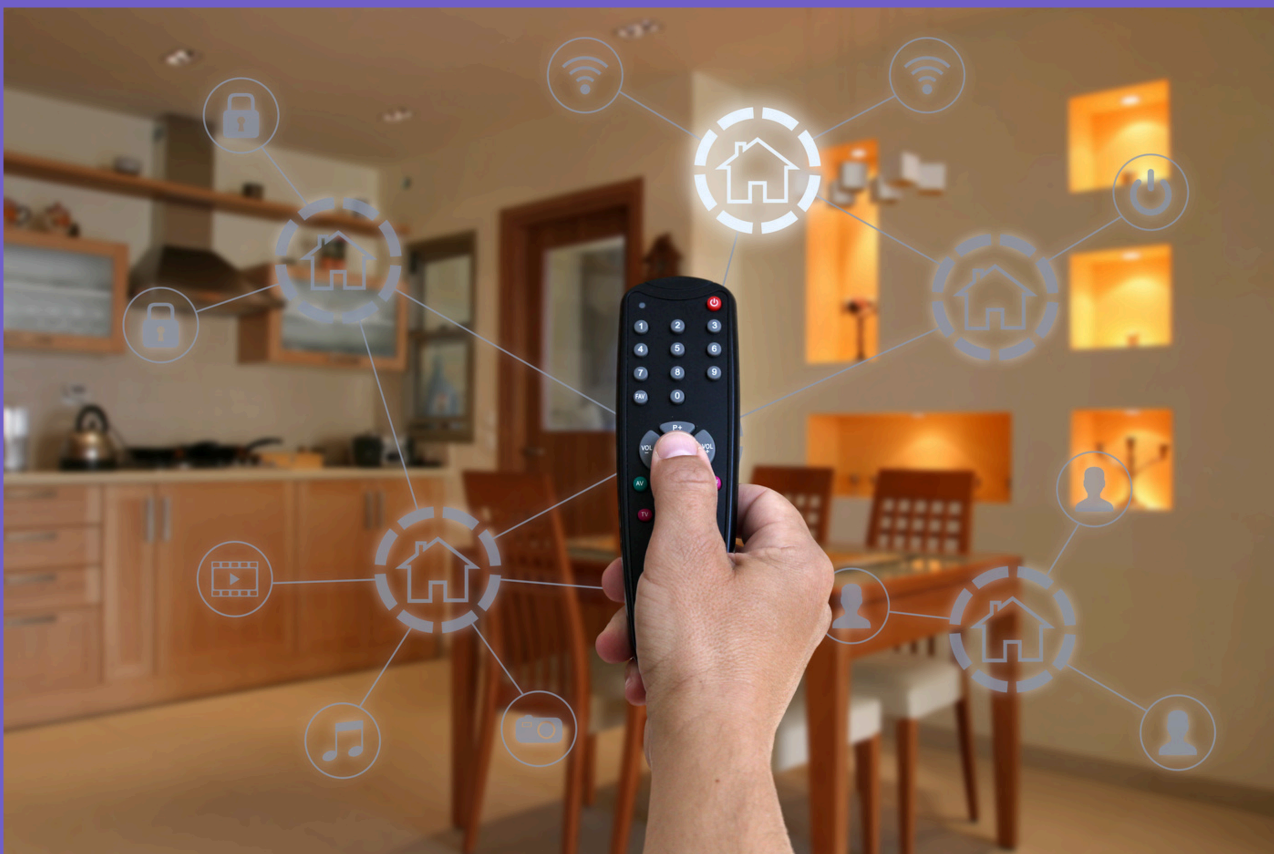
With digital connectivity woven into every aspect of daily life in the UK, consumer expectations and priorities are shifting. Broadband providers are now central to economic and social infrastructure. As this digital dependency is further accentuated by trends in health, education, and business, broadband will increasingly become an essential service. For the sector, this represents both challenge and opportunity.

Beyond speed: competing on service, security, and value

Predicting the future technology landscape is fun, but notoriously difficult. One trend is certain: demand for data and digital services will continue to rise. Fast, reliable connectivity is now a baseline expectation, shifting consumer priorities and what they seek from their ISPs.

At a time of consolidation in the sector, this provides food for thought for ISPs. Speed is no longer a differentiator, as most providers can now offer fast connectivity. Equally, traditional differentiators, like email or voice, are increasingly the domain of over-the-top providers. Discussions with ISPA UK members indicate that, soon, the market will be defined by delivering comprehensive connectivity requirements, encompassing fast speeds and good customer service, alongside new offerings like security and safety.

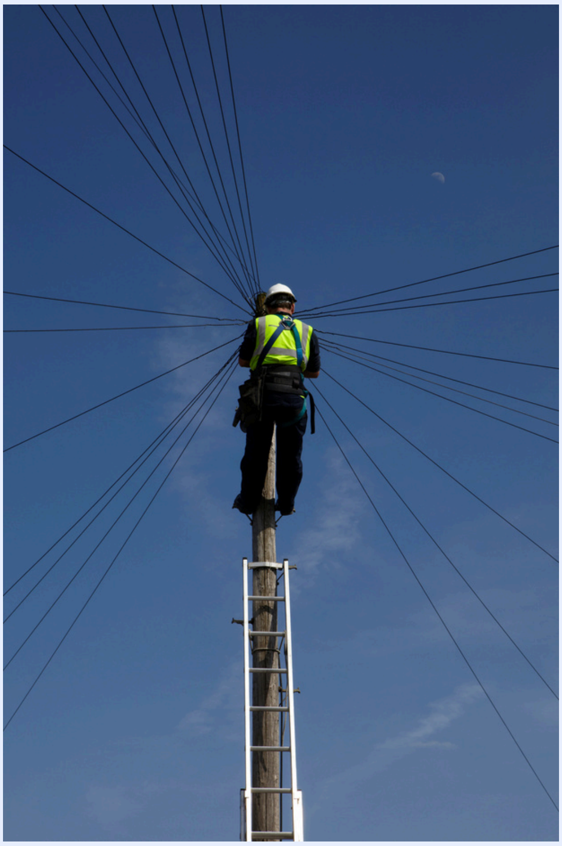
In a world where so many online services are provided for "free", ISPs are unique in having customers who pay for long-term contracts. This creates room to diversify, either through traditional bundles or new, complementary services. The sector is already seeing innovation, with private networks and other offerings, as focus shifts from building infrastructure to providing an affordable and efficient service for customers.



CONCLUSION

Over the past 30 years, we have seen profound transformation driven by the expansion of broadband connectivity in the UK. The research clearly demonstrates that fast, reliable internet access has become a fundamental necessity. It is central to economic productivity, social inclusion, and access to vital services such as healthcare, education, and remote work. As connectivity becomes increasingly embedded in everyday life, public expectations and sector responsibilities continue to evolve.

It is clear that there is overwhelming public support for access and continued investment in digital infrastructure, even as the industry faces the complex challenge of reaching rural and hard-to-connect premises. While a minority may express concerns about connectivity infrastructure, the broader public recognises its significant benefits, and it is crucial that the government remains committed to supporting rollout in order to realise its growth ambitions.



The majority of respondents view connectivity as a public good and are willing to accept temporary disruption for long-term benefit. However, regional disparities in awareness and access persist, emphasising the need for tailored communication and targeted rollout strategies.

The survey also underscores a shared societal responsibility for ensuring affordability, safety, and digital inclusion. While industry initiatives are recognised, there is a clear call for stronger government leadership and public-private partnerships to bridge remaining gaps. Furthermore, building a secure online environment requires coordinated action across government, industry, and technology platforms to maintain public trust and confidence.

As emerging technologies, digitised public services, and thriving rural businesses increasingly underpin the UK's economic and social growth, their success is fundamentally dependent on a strong, resilient, and secure connectivity infrastructure. It is essential that cross-government departments prioritise and actively support its continued development and protection, while at the same time recognising that just because something is delivered via digital communications networks, it cannot be the exclusive responsibility of those network providers, but needs to involve a cross section of economic actors, society and the public sector.

Looking ahead, delivering on the promise of universal and resilient connectivity will require collective ambition and a renewed commitment to truly reap the benefits over the next 30 years.

METHODOLOGY

This research was conducted by Censuswide, with a nationally representative sample of 2,000 UK consumers aged 18 and over. Fieldwork was carried out between 9th and 11th April 2025. The survey was conducted in accordance with the Market Research Society (MRS) Code of Conduct and adheres to the principles of ESOMAR. Censuswide is a member of the British Polling Council.

ABOUT ISPA

The Internet Service Providers' Association (ISPA UK) is the trade association for providers of internet services in the UK. ISPA brings together the UK internet industry to provide essential support through innovation, knowledge and experience, as well as representing the interests of the sector to government bodies, regulators, and other stakeholders.

Our work helps shape future regulation on behalf of its members and provides opportunities for members to convey their interests to industry, government, regulators, parliamentarians and the media.

The Council sets ISPA's strategic objectives and signs-off policy decisions. ISPA's regulatory activity is coordinated through several policy subgroups:

- Broadband
- Consumer
- Cybersecurity

In addition, ISPA organises many events for our sector including the high-profile ISPA Awards, ISP Business Summit and Parliament and Internet.

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