Communities Broadband Survey Overview: Stirling Council, April 2012

1. Introduction

Stirling and Clackmannanshire Councils conducted an online survey with residents of the Council areas between August 2011 and February 2012 to gather evidence on the following:

- Broadband download and upload speeds by geography
- Information on how broadband is used by residents
- Information on any current issues with broadband service provision

The evidence gathered will be used by the Councils to support funding applications to improve the existing broadband infrastructure across the Clackmannanshire and Stirling Council areas. The download speeds and post-code information collected by the survey will also be used to map broadband speeds across the area.

The survey was publicised widely by the Councils and the local and community press. Stirling Council also sent it to its Citizens Panel. 916 residents completed the survey after being contacted by the Councils or seeing publicity in the local press. It should also be noted that the time of day varied at which respondents completed the survey, plus the number of people using their internet connection, etc.

2. Overview of survey results

916 returns were received to the communities broadband survey, with respondents based in:

- Stirling Council area – 62.3%
- Clackmannanshire Council area – 37.2%
- Falkirk Council area – 0.3%
- Outside Forth Valley area – 0.1%

Table 1 below shows the download and upload speeds recorded by respondents to the communities survey.

- 38.9% of respondents had download speeds of 2 MB or less, 30.8% had download speeds of 2.01-5.00 MB, 24.9% had download speeds of 5.01-10 MB and around 5% had download speeds of more than 10 MB.
- Nearly all respondents (99%) had upload speeds of 2 MB or less.

Table 1: Download and upload speeds recorded by respondents

	Download Speed	Upload Speed
0 MB	0.1%	0.2%
0.01-2.00 MB	38.9%	99.0%
2.01-5.00 MB	30.8%	0.7%
5.01-10.00 MB	24.9%	0%
10.01-24.00 MB	5.2%	0.1%
24.01-40.00 MB	0.1%	0%
40.01-80.00 MB	0%	0%
>80.00 MB	0%	0%

Table 2 shows that the majority of respondents to the survey (97.6%) completed it from home.

Table 2: Location from where survey was completed

Location	% respondents
Home	97.6%
Place of work	1.4%
Place of study	0.2%
Other	0.8%

Respondents to the survey were asked how they were connected to the internet while completing the survey – the majority (90.9%) reported that they were connected via a phone line (ADSL).

Table 3: How connected to internet when completing the survey

Type of connection	% respondents
Broadband via phone line (ADSL)	90.9%
Dial-up or ISDN via phone line	0.1%
Wi-fi- via a hotspot (not your own wireless system)	0.2%
Cable / fibre optic internet	0.5%
High-speed leased line (T1 / T3)	0.1%
Mobile phone or dongle (3G)	1.4%
Mobile phone or dongle (not 3G)	0.4%
Satellite broadband	3.2%
Other	0.1%
Don't know	1.0%

Table 4 shows the results to a question asking to what extent respondents to the survey agreed or disagreed that access to quality broadband was important to them. From the results it is clear that broadband is important to most, with 82.0% strongly agreeing and 16.8% agreeing.

Table 4: Extent to which respondents agreed or disagreed that access to quality broadband was important to them

To what extent do you agree or disagree that access to quality broadband is important to you?	% respondents
Strongly agree	82.0%
Agree	16.8%
Neutral	0.6%
Disagree	0.0%
Strongly disagree	0.3%
No opinion / not applicable	0.3%

Table 5 shows the results to a question asking individuals if they thought they would need a faster broadband connection within the next three years. The majority (88.9%) indicated that they would.

Table 5: Requirement for faster broadband connection in next three years

Within the next three years, do you think that you will require a <u>faster</u> broadband connection?	% respondents
Yes	88.9%
No	4.0%
Don't know / not applicable	7.2%

Table 6 shows the results to a question asking respondents to the survey if they thought that they would need a more reliable broadband connection within the next three years. The majority (86.5%) indicated that they would.

Table 6: Requirement for more reliable broadband connection in next three years

Within the next three years, do you think you will require a <u>more reliable</u> broadband connection?	% respondents
Yes	86.5%
No	8.0%
Don't know / not applicable	5.5%

Respondents to the survey were asked which activities they required broadband for. Table 7 below provides the results, showing that over half of respondents require broadband for the following activities:
- Email – 97.8%
- Shopping – 91.3%
- Online banking – 82.0%
- News, sport, weather – 80.9%
- Filling in forms, e.g. tax returns, Council tax – 78.5%
- Finding and booking holidays – 75.2%
- TV / films e.g. BBC iPlayer – 67.8%

- Working from home – 57.3%
- Watching video clips – 56.7%
- Social media, e.g. Facebook, Twitter – 53.6%
- Specialist interest forums, e.g. your hobby – 53.5%
- Travel reports – 51.7%

Table 7: Activities that individuals require broadband for

Activities that individuals require broadband for	% respondents
Email	97.8%
Shopping	91.3%
Online banking	82.0%
News, sport, weather	80.9%
Filling in forms, e.g. tax returns, Council tax	78.5%
Finding and booking holidays	75.2%
TV / films e.g. BBC iPlayer	67.8%
Working from home	57.3%
Watching video clips	56.7%
Social media, e.g. Facebook, Twitter	53.6%
Specialist interest forums, e.g. your hobby	53.5%
Travel reports	51.7%
Skype and video meetings	48.9%
Listening to music	46.2%
Downloading large files	46.1%
Selling items, e.g. through ebay, gumtree	39.4%
Checking lottery numbers	37.0%
Uploading large files	34.8%
Course work / studying	34.2%
Website updating and maintenance	32.8%
Instant messaging	31.0%
Cloud computing (files and applications online)	22.6%
Remote data storage and backup	22.1%
Internet telephone service	21.0%
Tele healthcare	5.7%
Other	4.8%
I don't require broadband	0%

Respondents to the survey were asked how they perceived that improvements to their broadband service (e.g. speed, reliability) would benefit them. Some of the key benefits mentioned included:
- Faster and more consistent speeds would allow quicker uploading / downloading of files, saving time, reducing stress levels etc.
- Time related benefits – less time wasted, achieve more in less time, convenience, less stressful.
- Better value for money, e.g. achieving the speeds being paid for.
- Make working from home easier / more effective / efficient.
- Save money – e.g. travel costs if can work more from home more, also environmental benefits of reducing CO_2 output.
- Allow more householders to use internet simultaneously. Reported as essential for many families with children needing broadband to access learning materials, home working, people wanting to view iPlayer, etc.

- Watch TV, films, iPlayer – many respondents reported that they were frustrated that iPlayer wasn't available to them due to inadequate broadband service – iPlayer is increasingly viewed as something that should be available to all.
- Greater access to educational material – increasingly school, college and university students need to access course work online. People investing in Open University Courses in their spare time.
- Ability to run more than one programme at once.
- Better communication with friends / family / support networks.
- Increase employment opportunities – e.g. ability to set up business from home, retrain, job search, etc.
- High speed and consistent broadband service viewed as essential for moden living / quality of life by many.
- Improvement to quality of video conferencing.
- Less time sitting at the computer – more time to do other things.
- Ability to do more community / voluntary work.

Respondents to the survey were asked if they used any other types of internet connection, other than their current connection. Table 9 shows the results.

Table 9: Other types of internet connection used by individuals

Other types of internet connection	% respondents
Mobile phone or dongle (3G)	29.1%
Broadband via phone line (ADSL)	22.7%
Wi-fi- via a hotspot (not your own wireless system)	15.1%
Mobile phone or dongle (not 3G)	7.5%
Don't know	3.7%
Other	2.9%
Dial-up or ISDN via phone line	1.5%
Satellite broadband	1.2%
High-speed leased line (T1 / T3)	0.7%
Cable / fibre optic internet	0.5%

Respondents to the survey were asked how much they pay per month for broadband. The responses are recorded in Table 10 below. It should be noted that some respondents were unable to break down the amount they pay for broadband from their overall phone / Sky package and provided an overall package amount.

Table 10: Amount paid (£s) by individuals for broadband service per month

Amount paid for broadband per month	% respondents
£0.00-£10.99	14.6%
£11.00-£20.99	45.2%
£21.00-£30.99	17.1%
£31.00-£40.99	3.7%
More than £40.99	1.3%
Unknown / no response	18.0%

Notes: Some individuals provided overall price per month for phoneline/Sky package.

Respondents to the survey were asked what speed of broadband access they were currently paying for. Table 11 below provides the responses:

Table 11: Speed of broadband access being paid for

Speed of broadband access being paid for	% respondents
0 MB	0.2%
0.01-2.00 MB	5.9%
2.01-5.00 MB	3.2%
5.01-10.00 MB	39.3%
10.01-24.00 MB	17.6%
24.01-40.00 MB	0.8%
40.01-80.00 MB	0.3%
>80.00 MB	0.4%
Unknown / no response	32.3%

Table 12 below shows problems reported by respondents to the survey with their current broadband service. Over half reported that they experienced the following problems:
- Problems with speed at different times of the day (70.5%)
- Problems with maximum speed (61.5%)
- Problems with reliability (dropping out / being disconnected) (51.5%)

Table 12: Problems with current broadband service

Problems with current broadband service	% respondents
Problems with speed at different times of day	70.5%
Problems with maximum speed	61.5%
Problems with reliability (dropping out / being disconnected)	51.5%
Problems of multiple users using limited capacity (bandwidth)	28.6%
Problems with mobile network coverage	19.7%
Don't know / No problems	6.9%
'Other'	3.7%

Respondents to the survey were asked how satisfied they were with a number of aspects of their broadband service. Table 13 provides a matrix of the

results, which shows that over a quarter of businesses were dissatisfied with the following aspects of their broadband service:

- Consistency of speed (60.1%)
- Quality of service (37.4%)
- Choice of broadband suppliers in their area (34.3%)
- Monthly cost (29.1%)
- Quality of technical support (28.2%)

Table 13: Level of satisfaction with various aspects of broadband service (%)

	Very satisfied	Fairly satisfied	Neutral	Fairly dissatisfied	Very dissatisfied	Don't know
One-time installation cost	28.4	34.3	28.3	3.1	2.6	3.4
Ease of installation	31.5	41.3	19.9	3.9	1.8	1.5
Monthly cost	11.4	31.1	27.2	18.2	10.9	1.3
Return on investment in broadband	7.7	21.7	37.5	13.3	10.6	9.2
Consistency of speed	2.9	16.4	19.6	28.1	32.0	0.9
Quality of service	5.0	28.5	28.0	21.5	15.9	1.1
Quality of technical support	8.2	23.4	31.4	13.1	15.1	8.8
Choice of broadband suppliers in your area	4.6	17.2	35.4	14.3	20.0	8.6

426 respondents to the survey reported that they would be willing for a member of Stirling Council / Clackmannanshire Council or a partner organisation to contact them about their broadband service.