

Superfast Northamptonshire Community Demand Registration Survey 2013

Results and Analysis

Superfast Northamptonshire: Local Communities Broadband Survey

Introduction

The completion of this survey will help the County Council and your local Parish Council understand the level of demand for superfast broadband services in communities across Northamptonshire. This is important to help the Superfast Northamptonshire Project which is supporting the roll out of broadband infrastructure to parts of the county which otherwise would not be served by the commercial market. The collated results will help us to promote Northamptonshire as a place for broadband suppliers to invest by demonstrating the strength of demand for services.

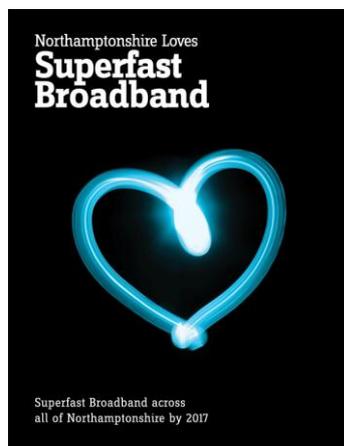
The survey won't take longer than 5 minutes to complete and you will not be identified by the answers that you give.

If you would like to find out what speed your broadband service currently provides to you then Think Broadband provides a free, quick and simple speed checker please [click here](#).

If you have any questions about this research please contact your Local Parish contact, otherwise you can contact the County Council's Broadband Delivery Team at bigidea@northamptonshire.gov.uk

1. What is your full post code?
2. Which Parish do you live in?

November 2013



Community Demand Registration Survey: Results and Analysis

Contents	Page
1.0 Context.....	3
2.0 Methodology.....	3
3.0 Top Ten Demand Hot Spot Areas.....	5
Table 1: Top Ten Community Responses.....	5
Map: Local Community Demand Survey Response Map.....	6
4.0 Summary of Key Findings.....	7
5.0 Survey Findings.....	9
Figure 1: How likely are people to take up a superfast service.....	9
Figure 2: Current Community Internet Speeds.....	9
Figure 3: Current Bundle cost.....	10
Figure 4: Which Bundles are most purchased.....	10
Figure 5: Preferred length of superfast contract.....	11
6.0 Conclusion.....	11

1.0 Context

The Superfast Northamptonshire project aims to secure access to superfast broadband for all homes and businesses in the county by 2017. Broadband would normally be provided by commercial providers but in some parts of the county, as elsewhere in the UK, a commercial solution is not viable. It is in these areas where the County Council is taking forward initiatives to help to secure access to superfast broadband services.

The County Council is co-investing with BT and Government's Broadband Delivery UK (BDUK) to subsidise the roll out of superfast broadband to over 50,000 premises by 2015; this will take coverage to around 90% of all premises in the county when combined with other commercial plans. The County Council published the Northamptonshire Next Generation Strategy in June 2013 which sets out its approach to extend coverage and meet the project's full coverage targets between now and 2017.

Demonstrating the potential demand for superfast broadband services is a key driver to help the county attract commercial investment. Telecoms infrastructure providers need confidence that they will secure a return on their investment over time through adequate revenues generated through the take up of superfast services. The County Council has embarked upon a number of demand registration surveys in 2013 to capture information on current service speeds which residents and businesses are experiencing, their desire for improved services, and to identify hot spots of demand for superfast broadband.

One of these surveys was targeted at residents in communities across Northamptonshire. The information gathered will be used to help inform the development of the Next Generation Strategy and early initiatives to extend coverage. It will help to highlight areas of high demand which in turn may inform early priorities. Importantly, the results will be shared with the wider telecoms market to help stimulate commercial investment.

2.0 Methodology

Two community demand registration surveys were undertaken in 2012/2013; the first running for 8 months and closing in March 2013 and the second running for 4 months and closing on 31 October 2013. The surveys were designed by the County Council with the technical consultancy ATKINS. They involved a series of questions to obtain information that would be useful to inform our Next Generation Strategy and be of interest to potential investors in Northamptonshire's broadband infrastructure. The survey established whether the respondent was the utility bill payer or not and included questions on:

- Internet usage including the number of people using the internet in the home, what they used it for now, and what they would use it for if they had access to faster broadband services.
- The nature of their current internet service (connection type, connection speed, reliability, data limit, what other services are bundled in with internet, which service provider they use, and whether they already have a superfast broadband service)
- What level of speed would they like
- The cost of their current internet bundle and how much the internet service costs within that bundle, as well as asking what respondents would be willing to pay for a superfast broadband service
- How likely they would be to take up a superfast broadband service if one was available and over what contract period.

The survey was presented on-line and accessed on 'Survey Monkey' (survey specialist website). Hard copies of the survey were provided on request.

The County Council promoted the survey through a number of routes including providing details to all parish clerks for distribution and promotion more widely locally. The survey was advertised in the Superfast Northamptonshire project Newsletter, on the project website and promoted through the local media. However, the penetration to individual households through these routes has its limitations. A supportive parish clerk or motivated local individual clearly resulted in higher response rates from some communities. This would suggest that these initial surveys have only scratched the surface of demand registration.

The two rounds of community survey in 2012/2013 collected 5,723 responses in total from residents around the county. This is a credible response rate for a public sector survey and provides a good indication of demand more generally for superfast broadband within Northamptonshire.

The County Council will be developing a demand stimulation programme over the coming months. Further activities and targeted initiatives will be taken forward in 2014. It is likely that a further round of demand registration surveys will also be launched later next year.

3.0 Top Ten Demand Hot Spot Areas

An analysis of the survey responses reveals a number of communities where registered demand for superfast broadband services is strongest. The table below shows the Top Ten communities based on all survey responses received, as well as the Top Ten for those communities which lie within the remaining Superfast Extension Area i.e. those areas where a superfast broadband solution has yet to be confirmed.

Table 1: Top Ten Communities Responses

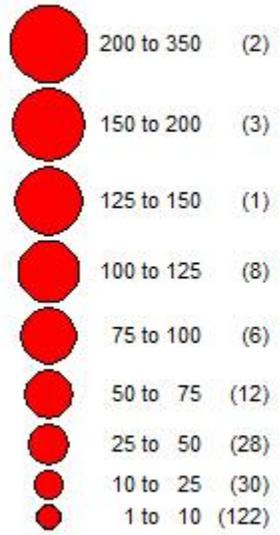
		Top 10 Demand Hot Spots: Countywide		Top 10 Hot Spots: Superfast Extension Area	
Rank	Community	Responses	Community	Responses	
1	Wollaston	330	Ravensthorpe	176	
2	Brixworth	218	West Haddon	117	
	Woodford Halse	218	Loddington	93	
4	Grange Park	192	Maidwell and Draughton	83	
5	Helmdon	188	Aston le Walls	58	
6	Ravensthorpe	176	Kings Cliffe	58	
7	Whittlebury	167	Preston Capes	46	
8	Hartwell	118	Farthingstone	39	
9	West Haddon	116	Guilsborough	38	
10	Harlestone	104	Dingley	34	
	Nassington	104			
Total		1,931	Total	742	

The Top 10 (11) communities overall included 1,931 responses which is 34% of all the surveys that were completed.

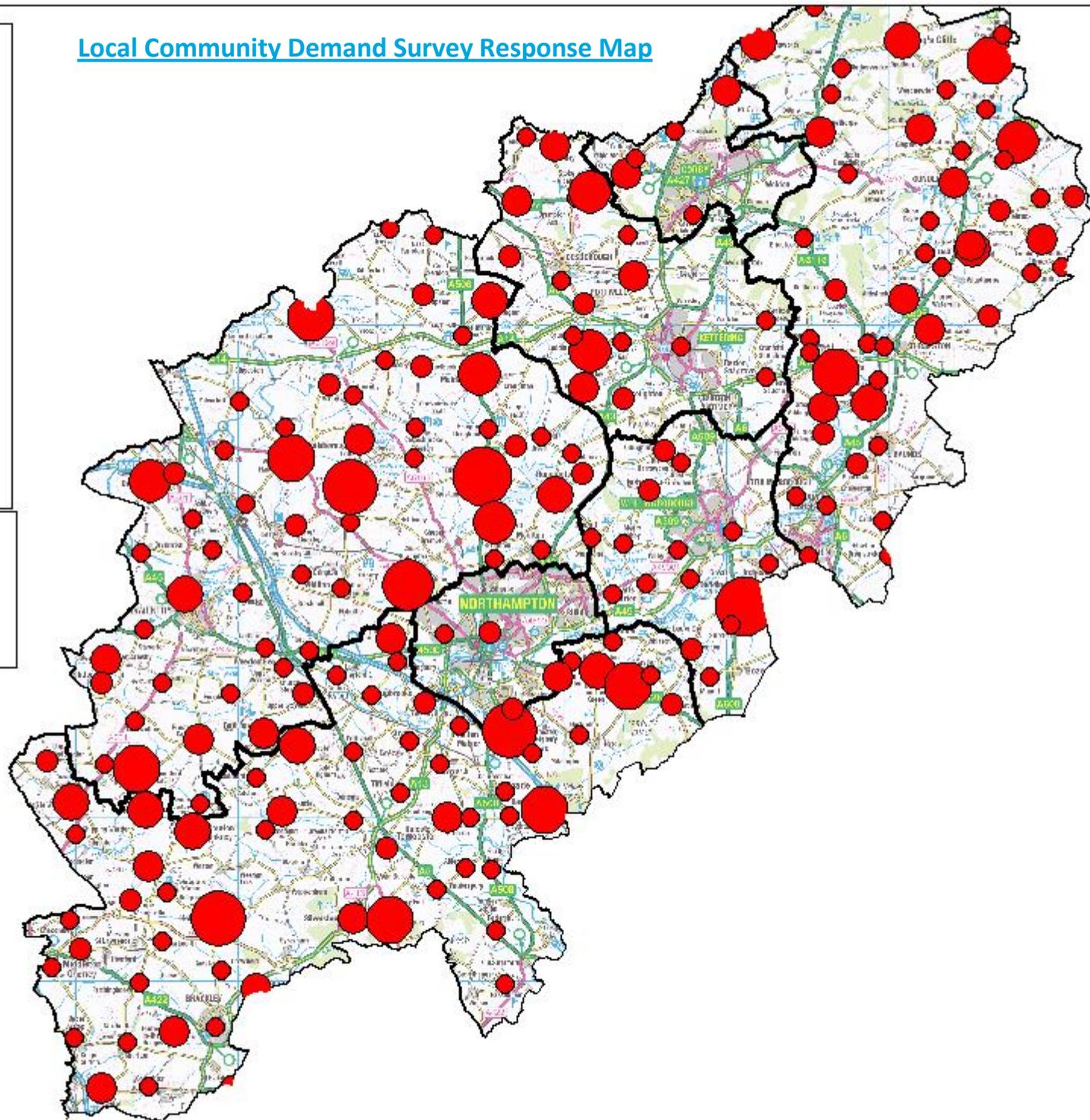
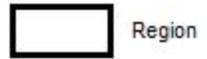
A map showing the scale and distribution of all community survey responses is shown below.

Local Community Demand Survey Response Map

Cumulative Responses



District



4.0 Summary of Key findings

All percentages are based on survey respondents only and not the wider Northamptonshire community.

Responses from the household utility payer suggested that, if superfast broadband was available it could lead to:

- **11%** increase in households accessing healthcare on line;
- **20%** increase in households video calling friends and family;
- **22%** increase in using the internet to watch TV/iPlayer/podcasts; and
- **9%** increase in people using the internet to study at home.

Other key findings:

- **3.7Mbps** was the average internet speed recorded by respondents based on the result of on-line speed checks
- **28Mbps** was the average of the speed service requirements indicated by respondents. A requirement for over 20Mbps was the most common response.
- **£26** was the average price respondents would be willing to pay for a superfast broadband service (other bundle services excluded).
- **85%** of respondents would 'definitely' or be 'very likely' to take up superfast broadband service.
- **3,472** people, representing over **60%** of respondents, would work from home if a superfast connection was available to give them more advanced communication applications and fast file transfers.
- **28%** of respondents used the internet to run a business from home.
- **21%** of respondents currently use the internet to access healthcare – this could rise to **32%** if superfast broadband services were available to support access to remote healthcare services.

- **15%** of respondents said they would start up a new business if they had access to superfast broadband. That is potentially **757** new businesses in Northamptonshire's amongst surveyed participants alone.
- **29%** of respondents reported unreliable internet services.
- The most popular internet applications were, Access to information, Email and online shopping. This was the case in particular with the Household Utility bill payer.

The utility bill payers tend to use their internet connection more for Virtual private networks, home business and access to health care as opposed to the non utility bill payers who value online gaming and social media to a greater extent. However, watching TV/iplayer and podcasts held equal aspirational value for both segments of the survey respondents.

Respondents that work from home are proportionally more likely to take up a superfast broadband service as 89% of them say they are 'very likely' to take up the service; 7% above the trend.

5.0 Survey Findings

Analysis of the community survey reveals that 99% of the survey participants already have an internet connection. This suggests that the results do not capture the untapped demand from those within the community who have yet to get on-line and realise the benefits.

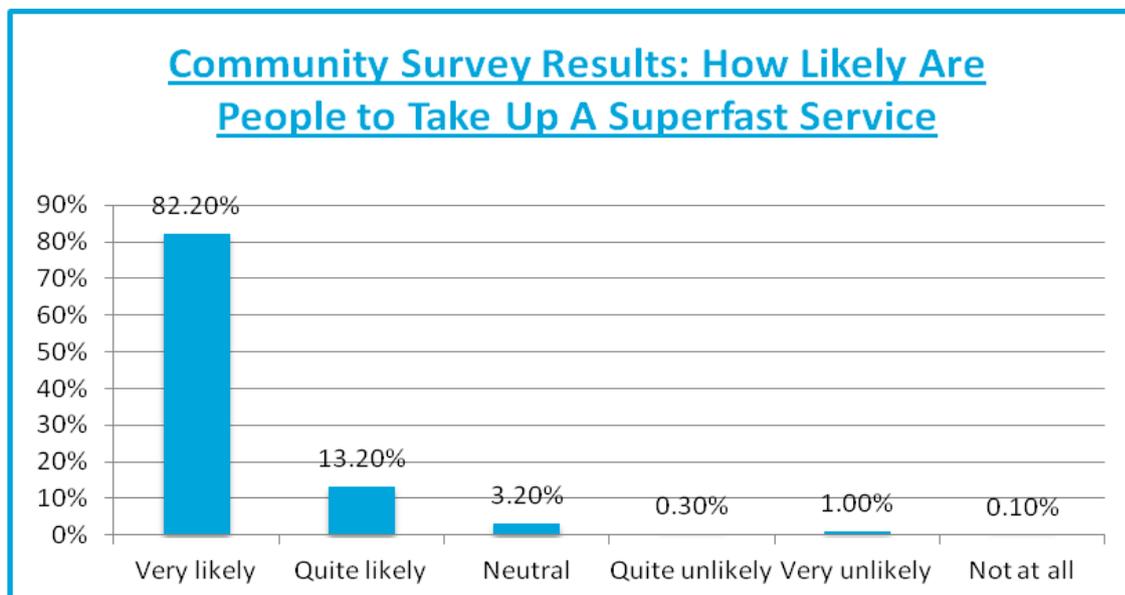


Figure 1: How likely are people to take up a superfast broadband service.

The definition of superfast broadband (speeds above 24Mbps) was set out in this survey question to inform respondents. Figure 1 shows that the vast majority (82%) of survey respondents are 'very likely' to take up a superfast service, with 95% of all the survey participants being quite likely or more to take up the service. As 99% of all survey participants already receive an internet service, it would seem that the communities in Northamptonshire are ready to receive superfast connections.

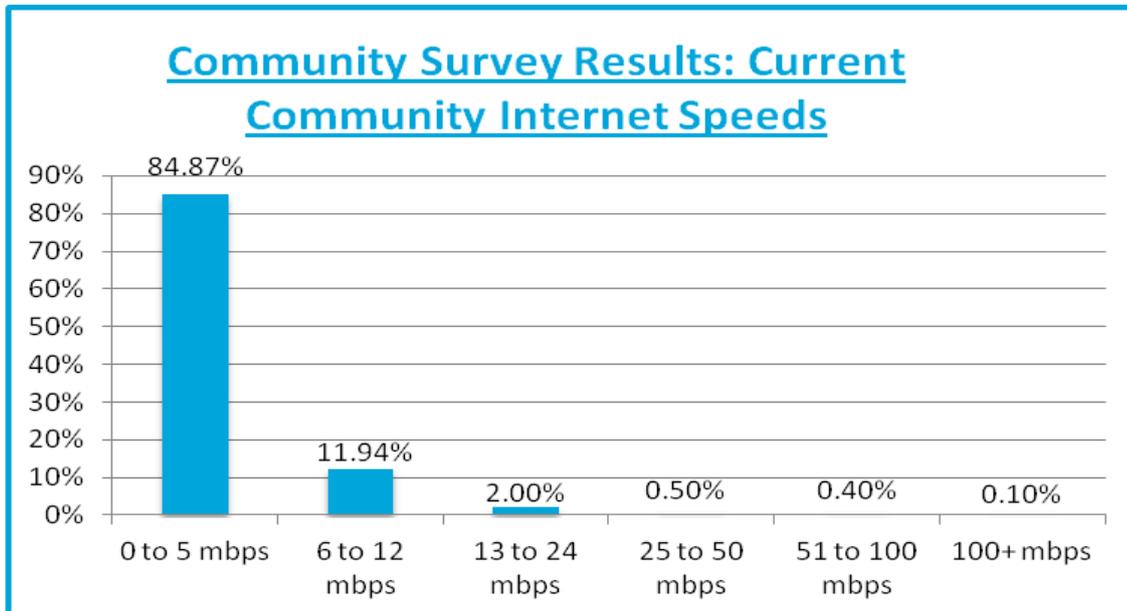


Figure 2: Current Community Internet speeds from online speed checker.

The vast majority of survey participants received a connection of below 5Mbps. The results from speed checker reports showed that the average was 3.74Mbps. This is considerably lower than the speed aspirations indicated by respondents, which on average was 28Mbps.

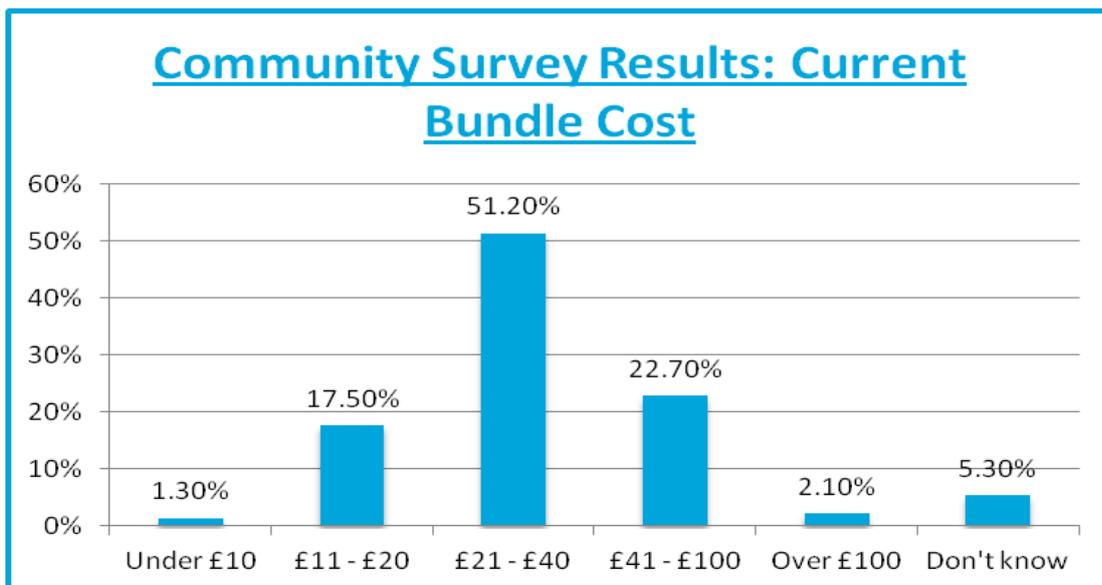


Figure 3: Current Bundle cost.

It is significant that the majority of communities are paying £21-£40 for their internet connections yet only receiving on average 3.7Mbps download speeds. Responses suggest that the average price people would be willing to pay to take up a superfast broadband service was £26. However, this figure could under represent the true value as many respondents did not give a numeric value, instead saying that they would pay what ever it took to get the connection to their respective areas. 28% of all survey participants used their internet to run a business from home. This jumped to 41% in respondents that paid

over £100 for their internet service. The majority of internet connections are provided by BT at 54%, the next most used service provider being Talk Talk at 12%.

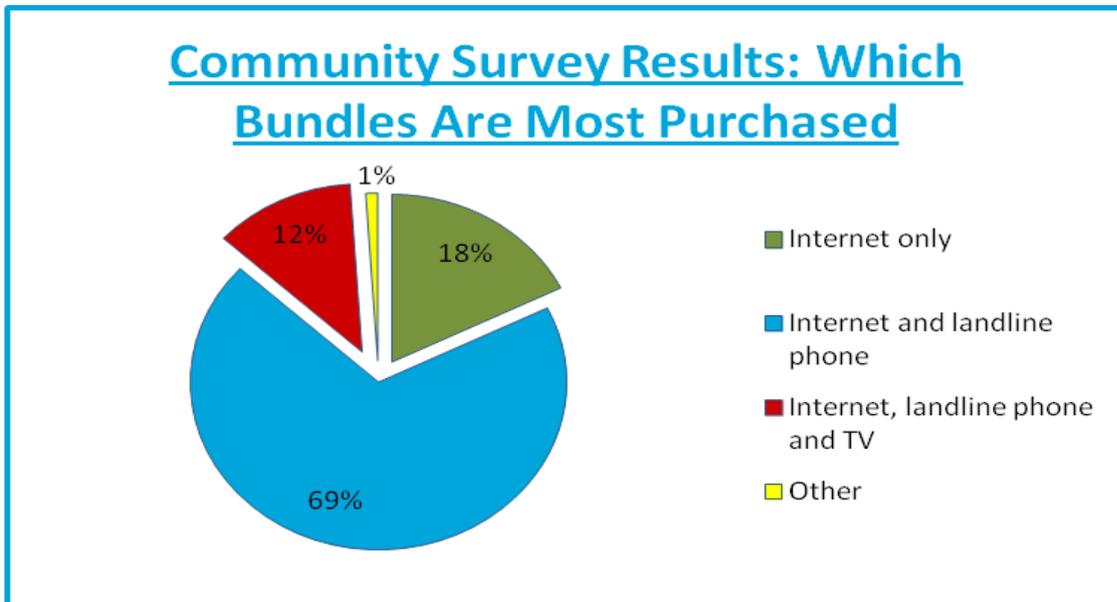


Figure 4: Which Bundles are most purchased.

69% of the survey respondents utilised an internet and landline service, with only 12% accessing the extra TV service.

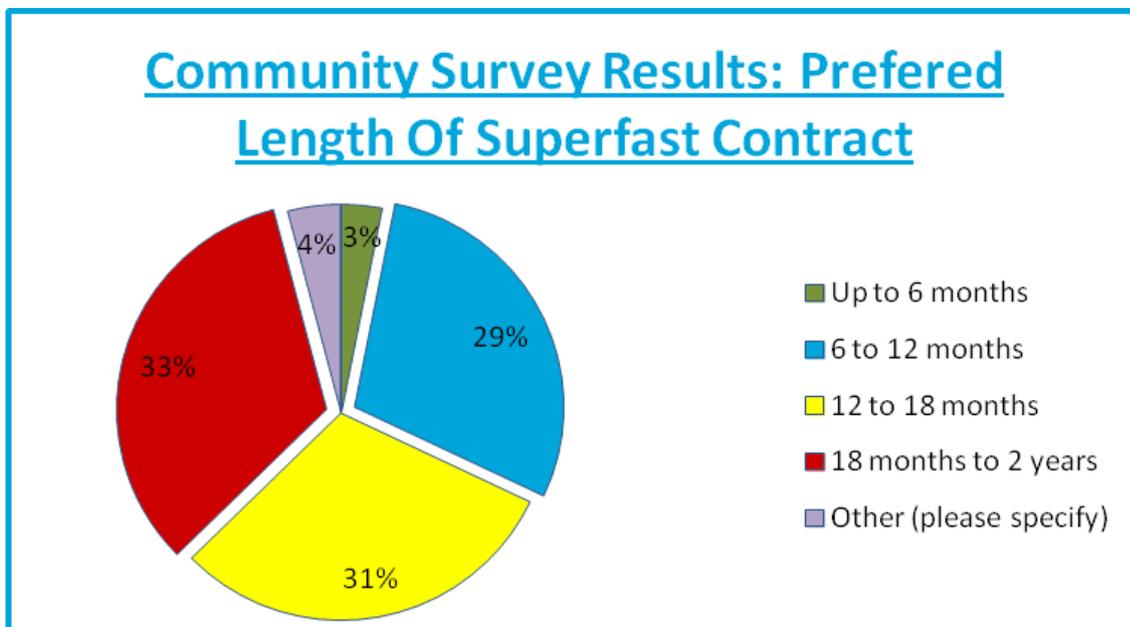


Figure 5: Preferred length of superfast contract.

Responses to the survey showed there is no overall preference in the optimum length of service contract requirements, with fairly equal preferences shown for contracts of 6-12 months, 12 to 18 months and 18 months to 2 years.

5.0 Conclusion

The outcome of the community broadband demand registration survey does suggest that there is demand for superfast broadband services from respondents, the majority of which (99%) were already on line but not getting level of service they would like. 85% of respondents indicated that they would 'definitely' or be 'very likely' to take up a superfast broadband service if it was available. There was also a strong level of interest in the opportunities which superfast broadband could have to enable people to start their own business and work from home. If this was scaled up to a county level there are clear benefits yet to be realised for economic growth. The potential growth in the number of people who would access healthcare services on line if they had a faster broadband service is also worth of note.

The level of responses received was significant for a public sector survey and the County Council is pleased that people have taken the time to participate. However, it is also clear that, with more targeted and interactive promotion and awareness raising, penetration and response levels could have been significantly higher.

Demand for superfast broadband services is only expected to increase.