



Department
for Culture
Media & Sport

Emerging Findings from the BDUK Market Test Pilots

Annex C:

BDUK subscriber survey of Pilot schemes in hard to reach areas

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BDUK subscriber survey

1. Key points

- The online subscriber survey ran from 9th August to 14th September, 2015 looking at broadband experiences in pilot schemes set up to supply broadband in hard to reach areas of the United Kingdom.
- An estimated maximum of 320 customers were emailed by their broadband suppliers and invited to take part in the survey. They were offered five pounds off a future broadband bill as an incentive.
- Overall, there were 93 responses to the survey from five of six pilot schemes; 61 from satellite and 32 from non-satellite schemes. One scheme did not participate due to very low numbers of connected customers in the survey period. The estimated response rate was around 29%.
- At the time of completing the survey, over half the respondents (54, 59%) had had new broadband installed for one month or more.
- The most popular usage was for personal/leisure purposes.
- Respondents appeared satisfied with the new broadband performance for personal/leisure, study, business and flexible home working. However, those using new broadband for business purposes appeared the least satisfied.
- Satisfaction levels appeared quite high for general web browsing and downloading files and reasonably high for uploading files and listening to music online. Respondents appeared less satisfied with watching films or TV online.
- Almost all respondents (76, 92%) considered that there were benefits to the new broadband and the most popular benefits expressed were speed and reliability, followed by cost. However, the most important drawbacks expressed were cost and reliability.
- Almost three quarters (21, 72%) of those who purchased a 10Mbps package registered download speeds of 5 to 14Mbps and three respondents (10%) registered speeds of 15Mbps or more. Of those who purchased speeds of 30Mbps or more, almost one third (8, 30%) registered speeds of 25+Mbps but over one quarter (7, 26%) registered download speeds of 14Mbps or less.
- Almost all respondents (72, 94%) were more satisfied with the performance of their new broadband compared with the performance of their old broadband.
- If the price remained the same, over three quarters (65, 76%) intended to keep their new broadband. Almost one quarter (19, 22%) were undecided.
- Not all surveys were fully completed and so there is a discrepancy with the numbers in the analysis for some questions.

2. Introduction

An online subscriber survey ran from 9th August to 14th September, 2015 looking at respondents' experiences of different solutions¹ for supplying broadband to some of the hardest to reach areas of the United Kingdom. Six pilot schemes were invited to take part but one² did not participate due to very low numbers of connected customers at the time of the survey.

Customers were emailed by their broadband suppliers, invited to take part in the survey and offered five pounds off a future broadband bill as an incentive. Exact numbers were not available from suppliers but it is estimated that no more than 320 customers were contacted.

The main body of the report looks at combined data for all pilot schemes. Annex A and Annex B provide high level information on satellite and non-satellite pilot schemes.

Not all surveys were fully completed and so there is a discrepancy with the numbers for some questions. The estimated response rate was around 29%.

3. New broadband

3.1 Pilot areas

There were 93 valid responses³ to the survey, unevenly spread across eight pilot areas with almost two thirds (61, 65%) from Aberdeenshire; North Lincolnshire; and Dumfries and Galloway. See Table 1.

Table 1- Pilot areas

	Number of responses	Percentage
Aberdeenshire	28	30%
Antrim	4	4%
Dumfries and Galloway	14	15%
Fermanagh	0	0%
Hampshire	11	12%
North East Lincolnshire	2	2%
North Lincolnshire	19	20%
Northumberland	0	0%
Somerset	4	4%
The Borders	11	12%
Total	93	100%

3.2 Broadband suppliers

Almost two thirds of responses (61, 65%) were from the satellite pilots: Satellite Internet, Europasat and Avonline. See Table 2.

¹ Call Flow and Cybermoor (hybrid fibre and fixed wireless); Quickline (fixed wireless); Avonline and Europasat (Avanti) (superfast capable satellite); and Satellite Internet (superfast capable satellite).

² Cybermoor did not take part.

³ Valid responses - number of responses after data cleansing. Criteria used for data cleansing are available on request.

Table 2 - Broadband suppliers

Broadband supplier	Number of responses	Percentage
Satellite Internet	4	4%
Europasat	26	28%
Avonline	31	33%
Quickline	21	23%
Cybermoor	0	0%
Call Flow	11	12%
Total	93	100%

3.3 Pilot broadband packages purchased.

Respondents purchased a variety of broadband packages. Just under half (43, 46%) purchased speeds of 10Mbps or less and 37% (34) purchased speeds of 30Mbps. See Table C1, Annex C.

3.4 Broadband users in the household

Respondents answered the survey based on their own and their household's (if applicable) usage. They were asked which statement best described how broadband was used in their household. Eighty respondents (86%) indicated that they would either be the only user or the main user of broadband. See Table 3.

Table 3 - Broadband users in the household

Broadband users in the household	Number of responses	Percentage
Respondent is the only user	9	10%
Respondent is one of the users and also the main user	71	76%
Respondent is one of the users but not the main user	12	13%
Don't know	1	1%
Total	93	100%

3.5 Length of time new broadband has been installed

All but three of the respondents had had the new broadband installed and 54 respondents (59%) had had the new broadband for one month or more. See Table 4.

The remaining 90 respondents indicated that they had now used their new broadband.

Table 4 - Length of time broadband installed

Length of time installed	Number of responses	Percentage
Not yet installed	3	3%
Less than one week	9	10%
One week or more but less than two weeks	9	10%
Two weeks or more but less than one month	18	19%
One month or more but less than two months	25	27%
Two months or more but less than three months	9	10%
Three months or more but less than four months	8	9%
More than four months	12	13%
Total	93	101%

Note: total is over 100% due to rounding.

3.6 Different purposes of broadband usage and satisfaction ratings

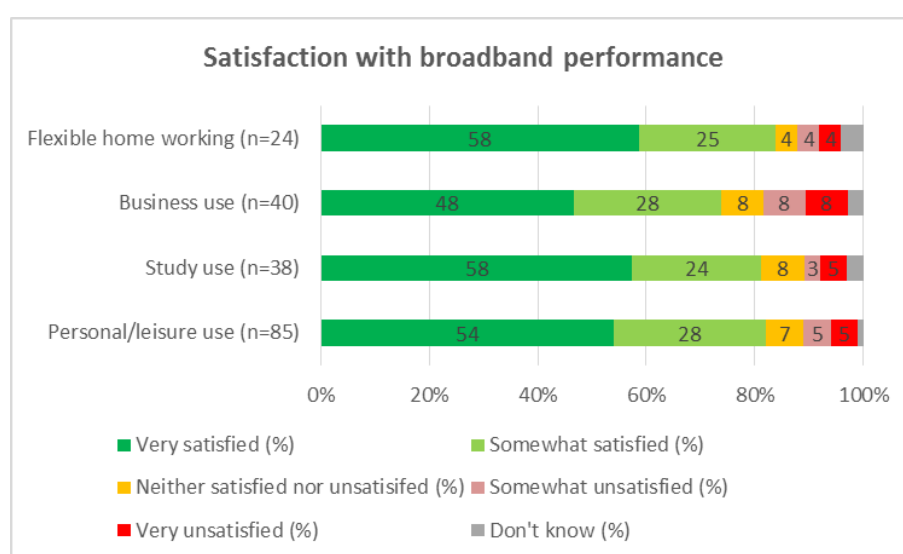
Respondents were asked about **all** the purposes for which they/their household used their new broadband. The most popular usage was personal/leisure (85, 96%), followed by business (40, 45%) and study use (38, 43%). See Table 5.

Table 5 - Purposes of broadband usage within the household

Broadband usage	Number of responses	Percentage
Personal/leisure	85	96%
Study	38	43%
Business	40	45%
Flexible home working arrangements	24	27%
Other (research)	1	
Other (charity)	1	
Other (phone)	1	

In the main, respondents appeared satisfied with the new broadband performance for these purposes with over three quarters of respondents for each 'use' indicating that they were either 'very' or 'somewhat' satisfied. Those using new broadband for business purposes (n=40) appeared least satisfied; six respondents (16%) were either 'very' or 'somewhat' unsatisfied. See Figure 1.

Figure 1 – Satisfaction with broadband performance

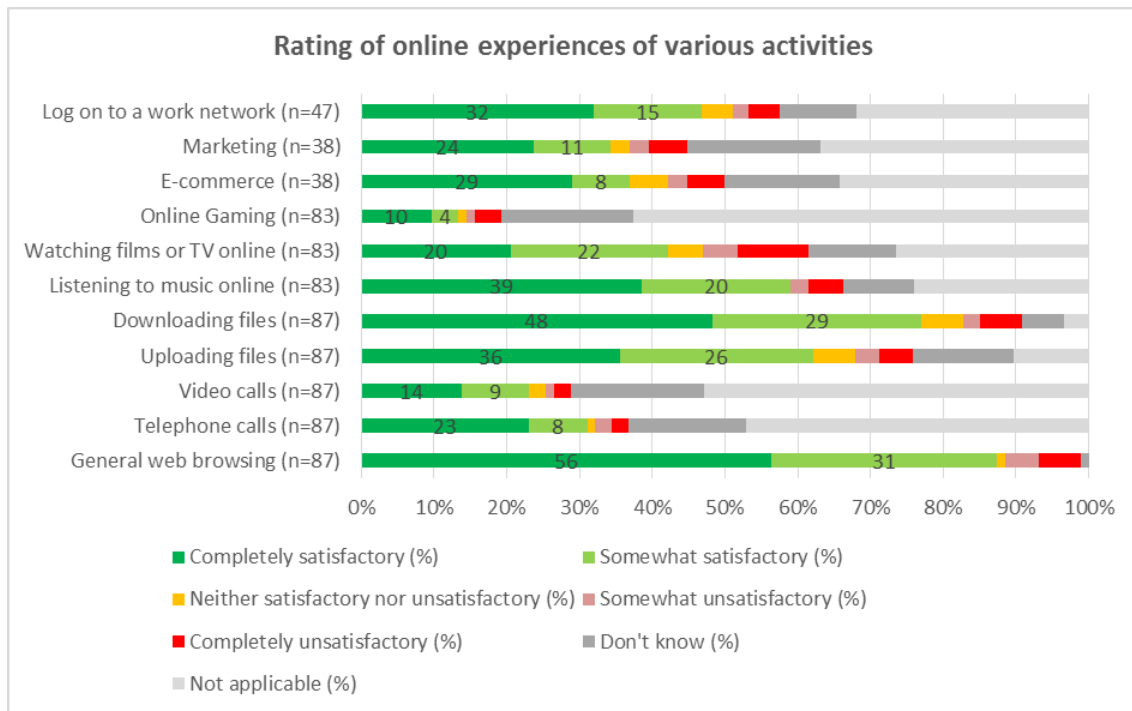


The reasons given for not being satisfied with performance included: slow speed; system failure; connection issues; intermittent quality with web browsing; performance affected by weather conditions; and price. Lack of a 24 hour response to fault queries was also commented upon. All verbatim reasons given, broken down by different usages, are shown in Table C2, Annex C.

3.7 Online experiences of various activities

Looking in detail at the online experiences of various activities, generally, where the activity applied, respondents rated their experience as 'completely' or 'somewhat' satisfactory. Over three quarters were satisfied with general web browsing (87%) and downloading files (77%) and well over half were satisfied with uploading files (62%) and listening to music online (59%). However, respondents appeared less satisfied with watching films or TV online, with 12 (15%) expressing some degree of dissatisfaction. See Figure 2.

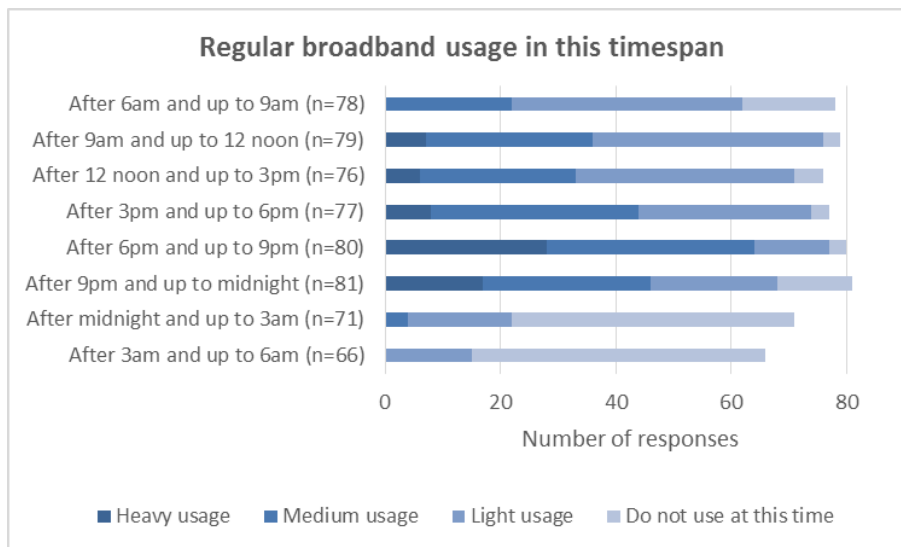
Figure 2 – Rating of online experiences of various activities



3.8 Regularity and performance rating of broadband usage in specific time spans

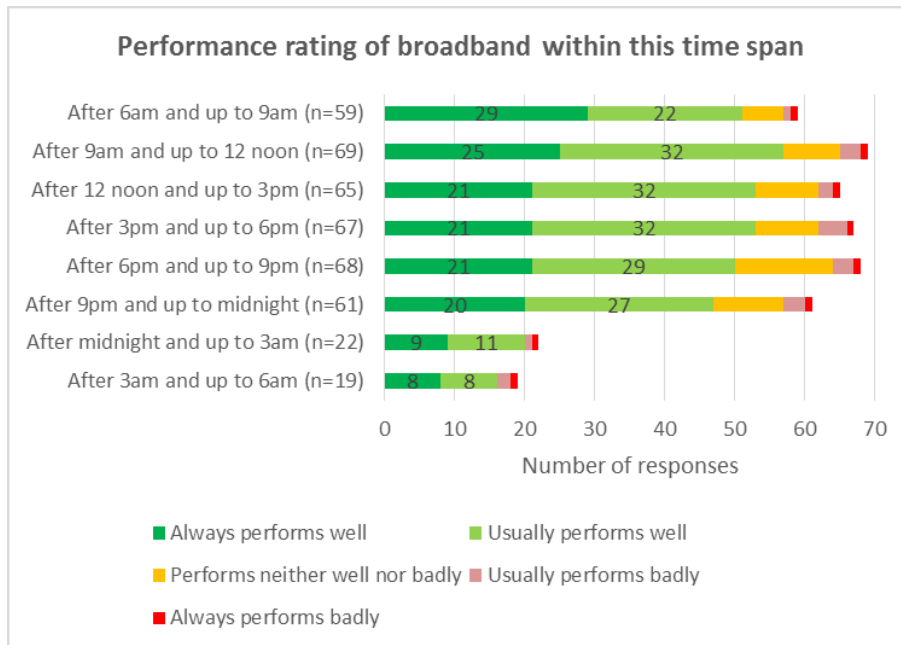
Regular broadband usage appeared to be largely light to medium usage between the hours of 6am and midnight. The heaviest regular usage was between 6pm and 9pm. See Figure 3.

Figure 3 – Regular broadband usage



The majority of respondents rated broadband as 'always' or 'usually' performing well in these time periods. Respondents appeared particularly pleased with performance between 6am and 9am. See Figure 4.

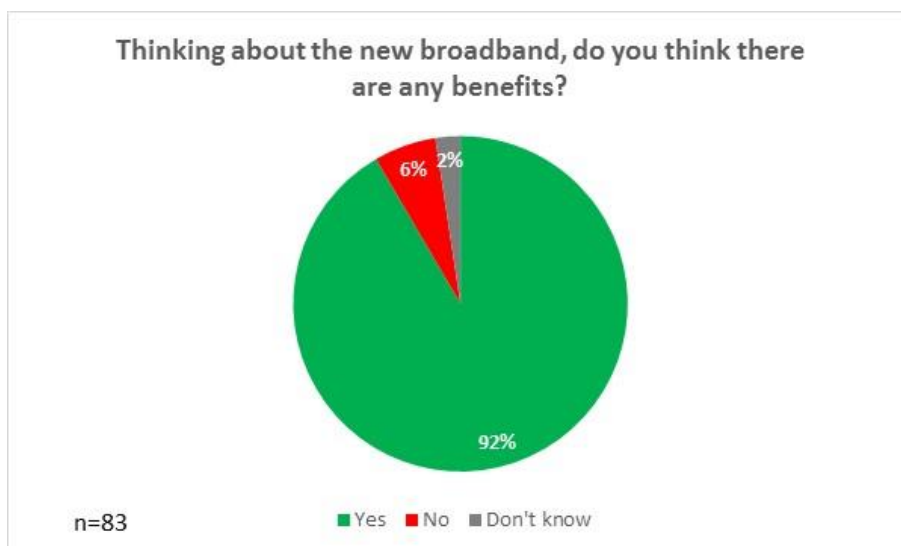
Figure 4 – Performance rating of broadband



3.9 Perceived benefits of new broadband

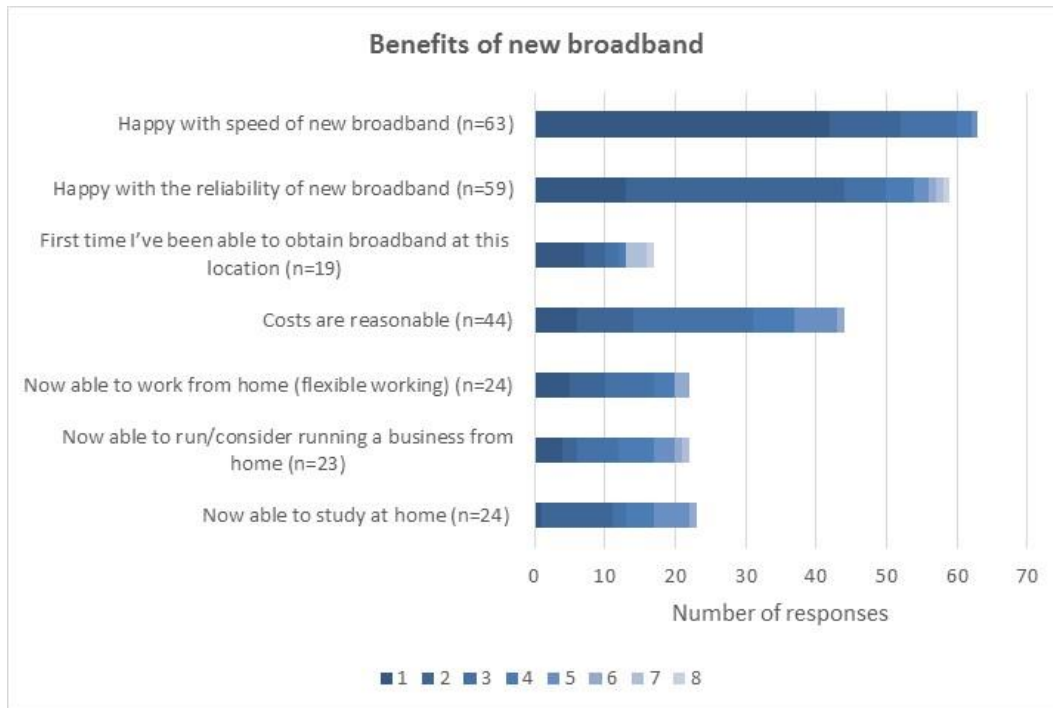
Respondents were asked to select from a list of potential benefits, ordering their choices, with 1 being the main benefit and 2 being the next in importance. They were able to rate as many or as few as they wished. The vast majority (76, 92%) thought there were benefits of the new broadband. See Figure 5.

Figure 5 - Whether or not respondents consider there are any benefits of new broadband



The most popular benefits expressed were speed and reliability, followed by cost. See Figure 6. Other benefits were also indicated and included: data allowance; streaming; and having no dish. All verbatim benefits are given in Table C3, Annex C.

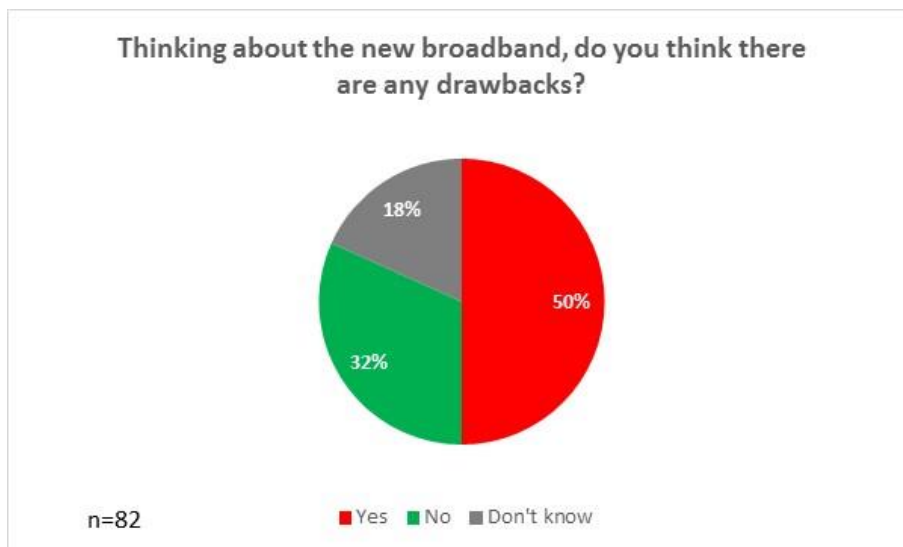
Figure 6 – Benefits of new broadband



3.10 Perceived drawbacks of new broadband

Respondents were asked to select from a list of potential drawbacks to the new broadband, again ordering their choices. Half (41, 50%) considered that there were drawbacks but almost one third disagreed (26, 32%). See Figure 7.

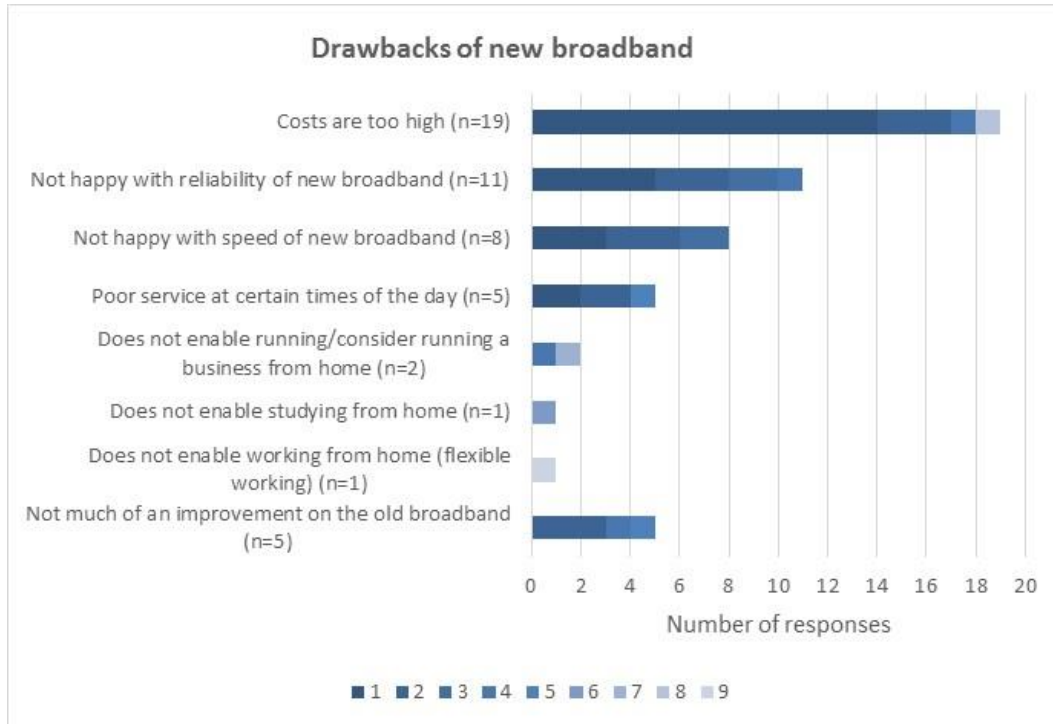
Figure 7- Whether or not respondents consider there are any drawbacks of new broadband



Nineteen respondents considered that costs were too high; 11 were unhappy with reliability; and eight were unhappy with the speed. See Figure 8.

Other drawbacks were also specified and these mainly provided more detail on speed and cost issues but also included: Wi-Fi range; not being able to monitor data usage; large and ugly dish; and poor customer service. All verbatim drawbacks are given in Table C4, Annex C.

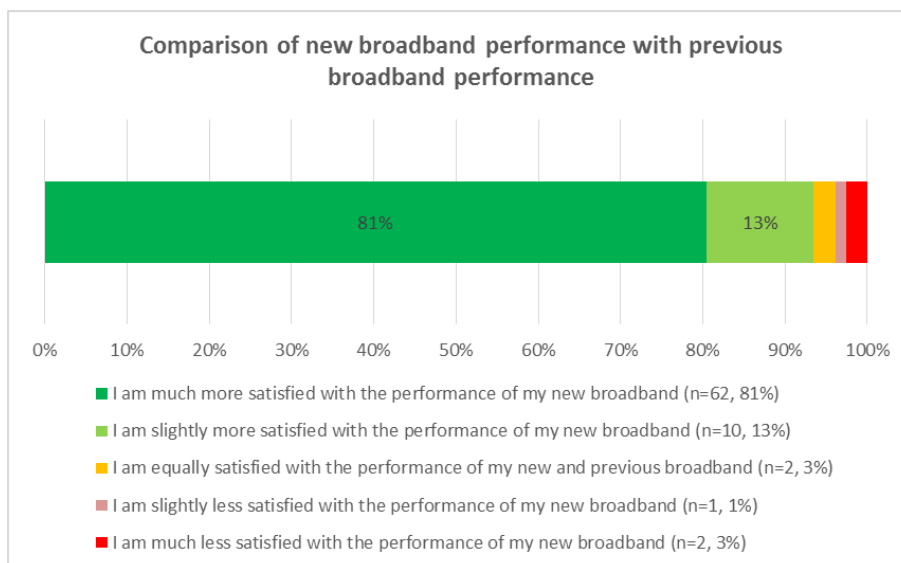
Figure 8 – Drawbacks of new broadband



3.11 Satisfaction with performance of new broadband

The majority of respondents (72, 94%) were more satisfied with the performance of their new broadband compared with their old. See Figure 9.

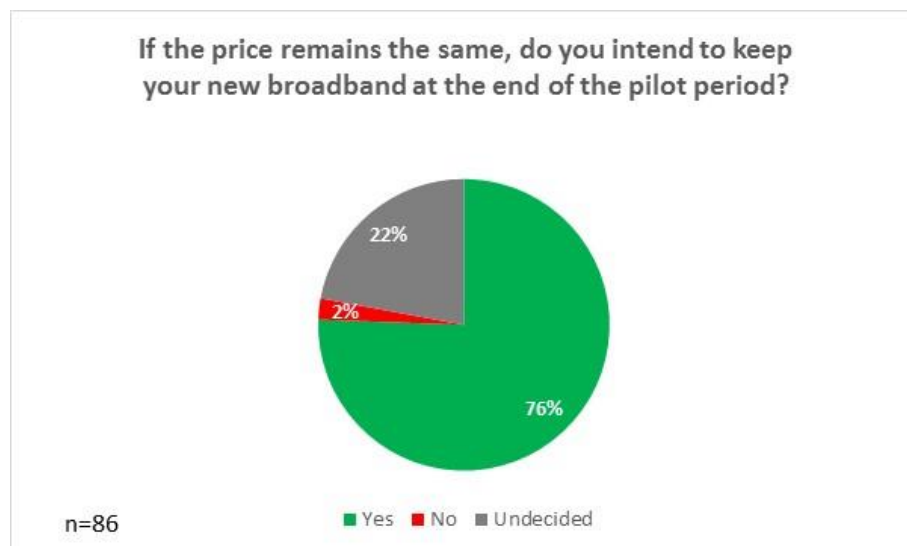
Figure 9 – Comparison of new broadband performance with previous broadband performance



3.12 Intention to keep new broadband after pilot

If the price remained the same, over three quarters (65, 76%) intended to keep their new broadband and almost one quarter (19, 22%) were undecided. See Figure 10.

Figure 10 – Intention to keep broadband at end of pilot period



3.13 Speed test results

Sixty seven respondents took the speed test. Upload speeds ranged mainly between 500kbit/s to 14Mbit/s. Download speeds ranged mainly between 5Mbit/s to 24Mbit/s. See Table 6.

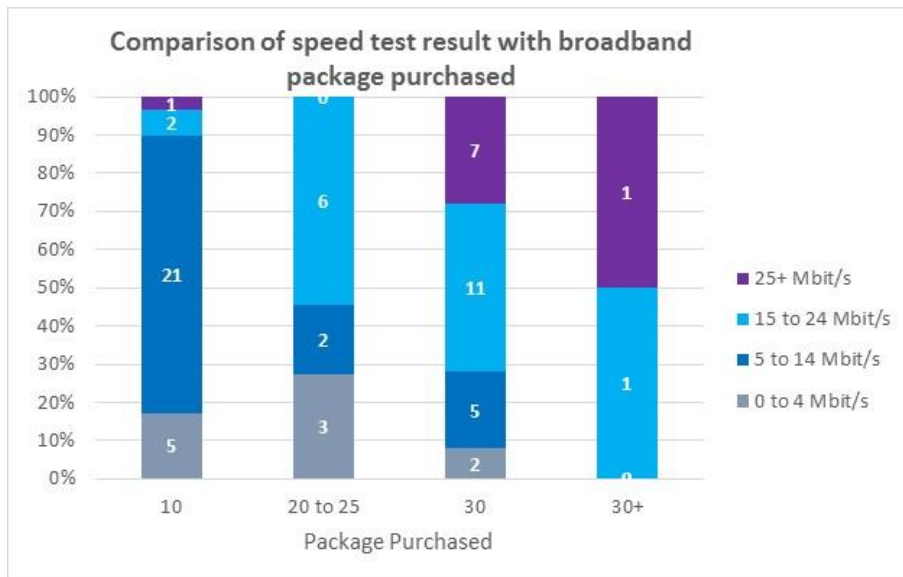
Table 6 - Speed test results

	0 to 500 kbit/s	500 kbit/s to 2 Mbit/s	2 Mbit/s to 4 Mbit/s	5 Mbit/s to 14 Mbit/s	15 Mbit/s to 24 Mbit/s	25 Mbit/s to 29 Mbit/s	30 Mbit/s to 99 Mbit/s	100 Mbit/s +
Upload speed	7	18	18	13	4	5	2	
Download speed	3	2	5	28	20	5	4	

Those who purchased the 10Mbps speed package appeared to fare best. Of the 29 respondents who purchased this package, almost three quarters (21, 72%) registered speeds of 5 to 14Mbps and three (10%) registered speeds of 15Mbps or more.

Looking at the higher speed packages, of the 27 respondents who purchased speeds of 30Mbps or more, almost one third (8, 30%) registered speeds of 25+Mbps. However, over one quarter (7, 26%) registered download speeds of 14Mbps or less. See Figure 11.

Figure 11 – Comparison of speed test result with broadband package purchased



4. Previous broadband

4.1 Previous broadband supplier

Over half the respondents had previously been with BT (41, 51%) and over one quarter (23, 29%) were spread across Talk Talk, Plus Net and Qsat. The full list is shown in Table C5, Annex C.

4.2 Broadband in current location prior to pilot

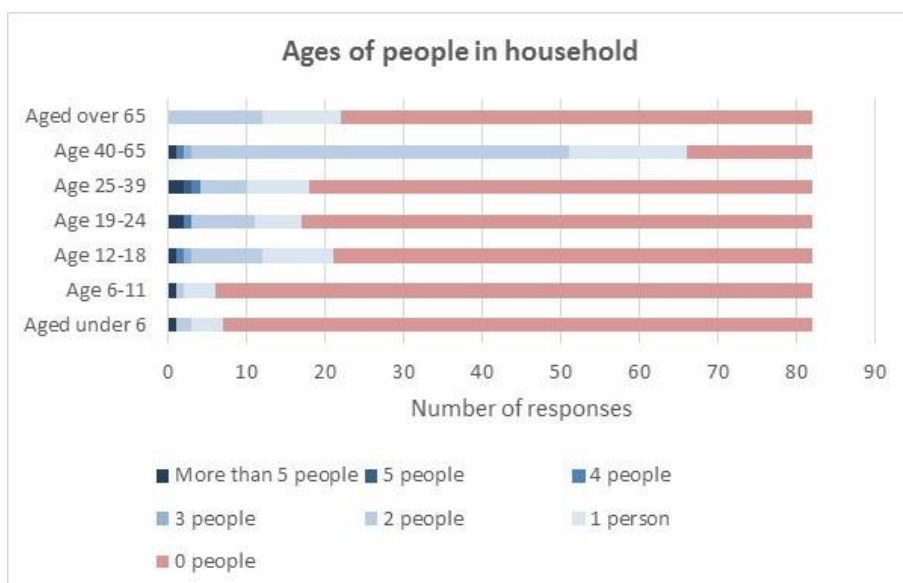
The majority of respondents (80, 93%) had had broadband in their current location prior to the pilot, six respondents (7%) had not. The reasons given for not having broadband were: not being available at their location; lack of phone line; slow speed; no personal computer/device; and expense.

5. Household information

5.1 Household demographics

Over three quarters of the households included at least one person aged between 40 and 65. See Figure 12.

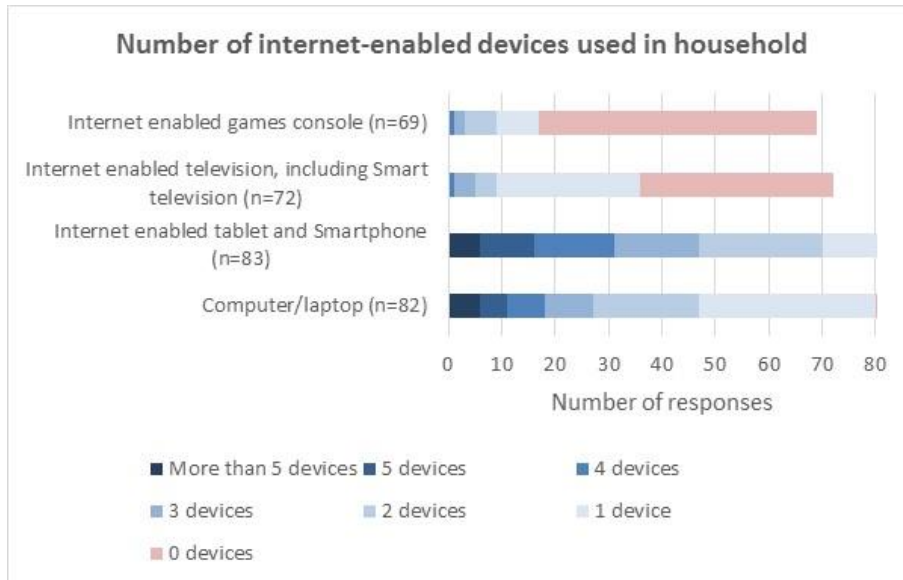
Figure 12 – Household demographics



5.2 Internet-enabled devices used in the household

Most respondents had internet enabled tablets, Smartphones and computers/laptops and six respondents had more than five of these devices in their households. Internet enabled games consoles and televisions were less prevalent. See Figure 13.

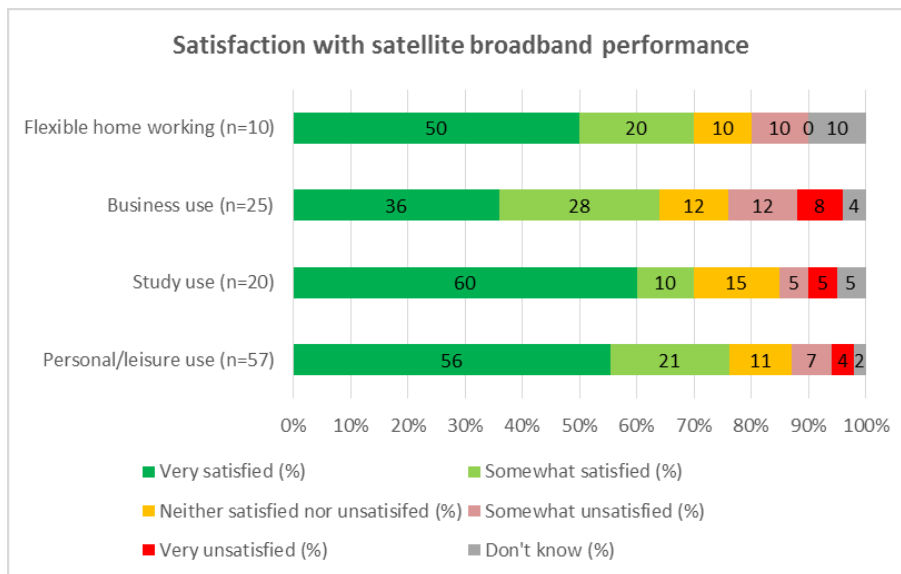
Figure 13 – Number of internet-enabled devices used in household



Annex A – Satellite pilots

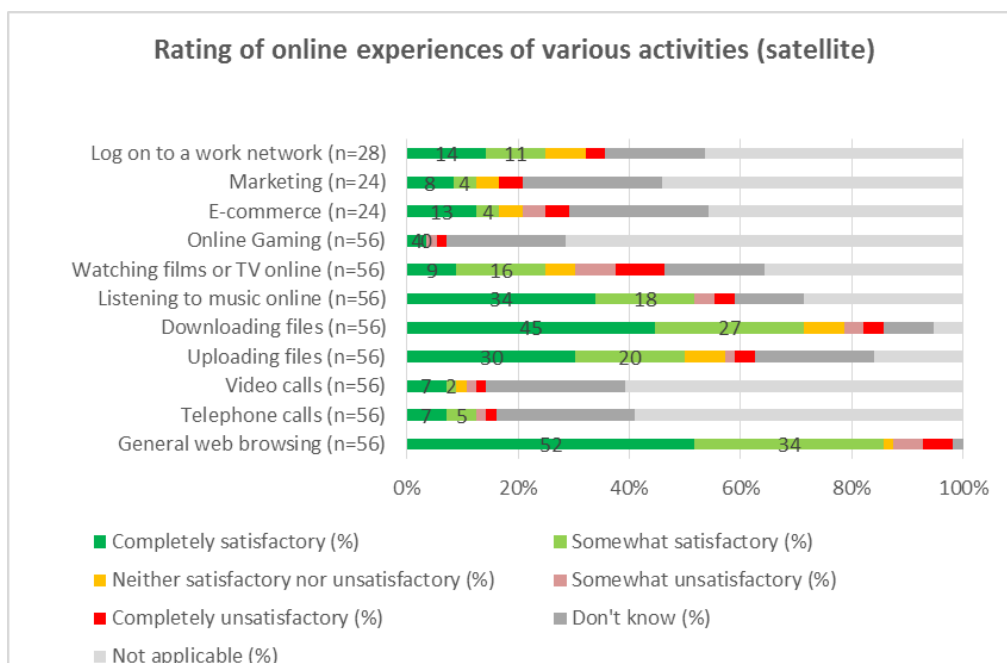
- There were a total of 93 responses to the survey and almost two thirds (61, 65%) were in one of the three satellite pilots.
- Over half the satellite group (35, 57%) purchased speeds of 10Mbps.
- Around two thirds to three quarters appeared satisfied with the new broadband performance for personal/leisure, study, business and flexible home working. However, one fifth (5, 20%) were unsatisfied with performance for business use. See Figure A1.

Figure A 1 – Satisfaction with satellite broadband performance



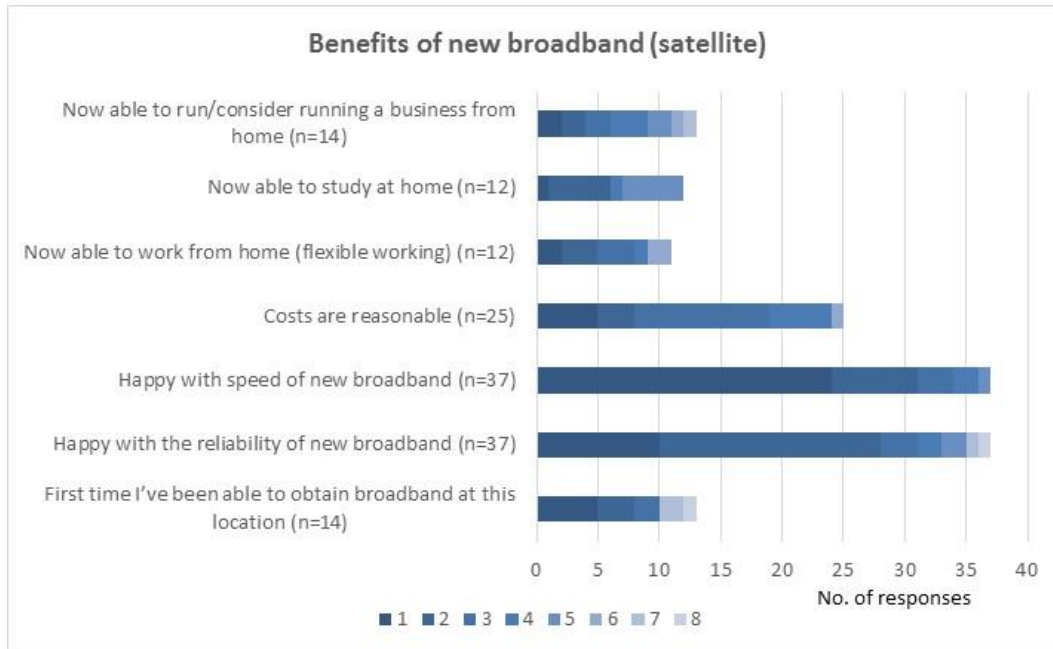
- Looking in detail at the online experiences of various activities, generally, where the activity applied, well over two thirds were satisfied with general web browsing and downloading files. Respondents appeared somewhat less satisfied with watching TV or films online. See Figure A2.

Figure A 2 – Rating of online experiences of various activities (satellite)



- The majority (48, 91%) considered that there were benefits of their new broadband.
- Respondents were asked to select from a list of potential benefits, ordering their choices, with 1 being the main benefit and 2 being the next in importance. They were able to rate as many or as few as they wished. The most popular benefits expressed were speed, reliability and cost. See Figure A3.

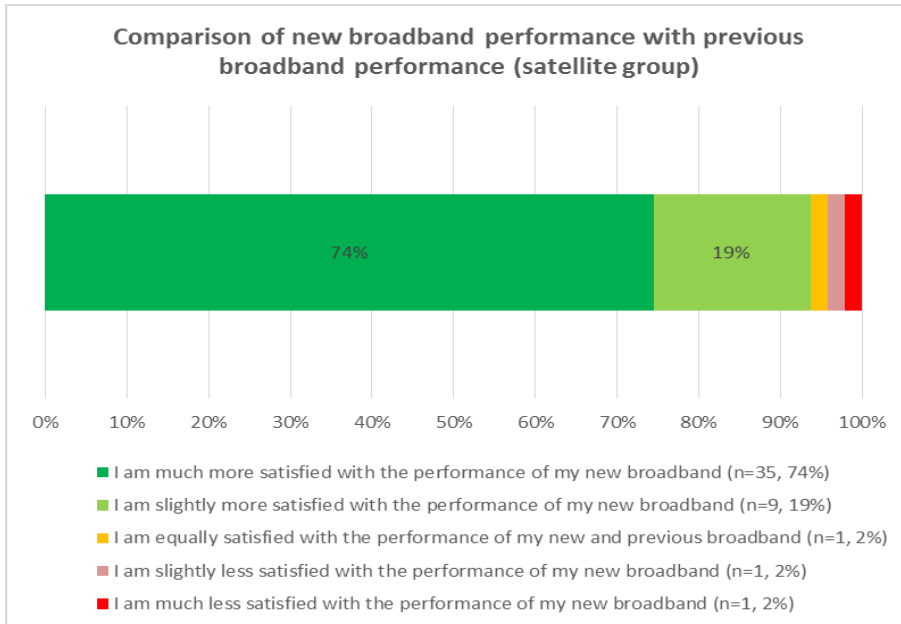
Figure A 3 – Benefits of new broadband (satellite)



- Just under half (25, 48%) thought there were drawbacks of the new broadband. Similar proportions either did not think there were any drawbacks (13, 25%) or stated that they didn't know (14, 27%).
- The main drawback appeared to be cost. Ten respondents rated this as their main or second drawback.

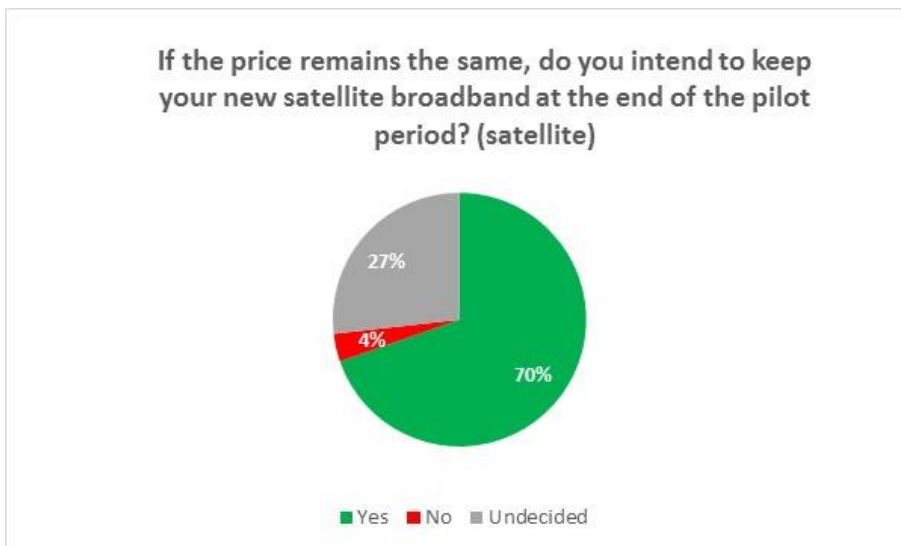
- The majority of respondents were more satisfied (44, 93%) with the performance of their new broadband compared with their old. See Figure A4.

Figure A 4 - Comparison of new with previous broadband performance (satellite)



- If the price remains the same, just over two thirds (39, 70%) intend to keep their new broadband at the end of the pilot period and around one quarter (15, 27%) were undecided. See Figure A5.

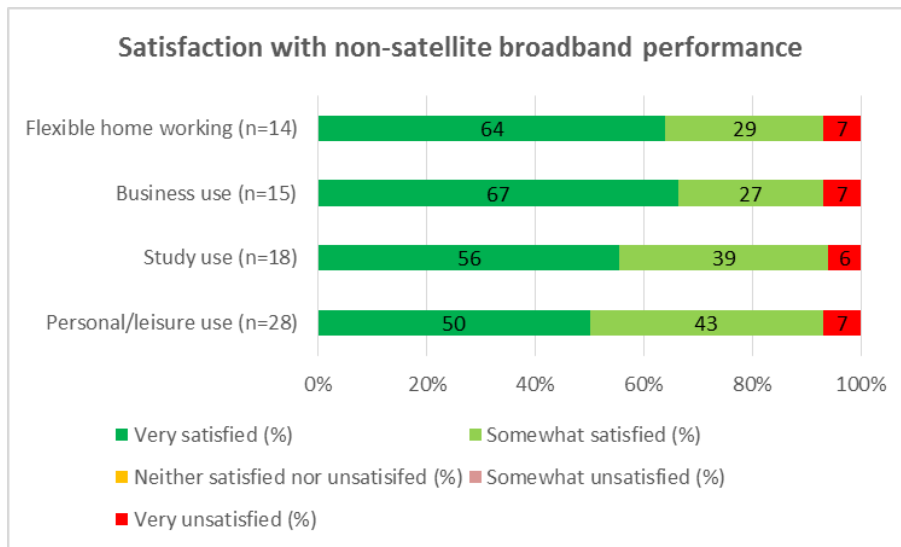
Figure A 5 - Intention to keep new satellite broadband at the end of the pilot period



Annex B - Non-satellite pilots

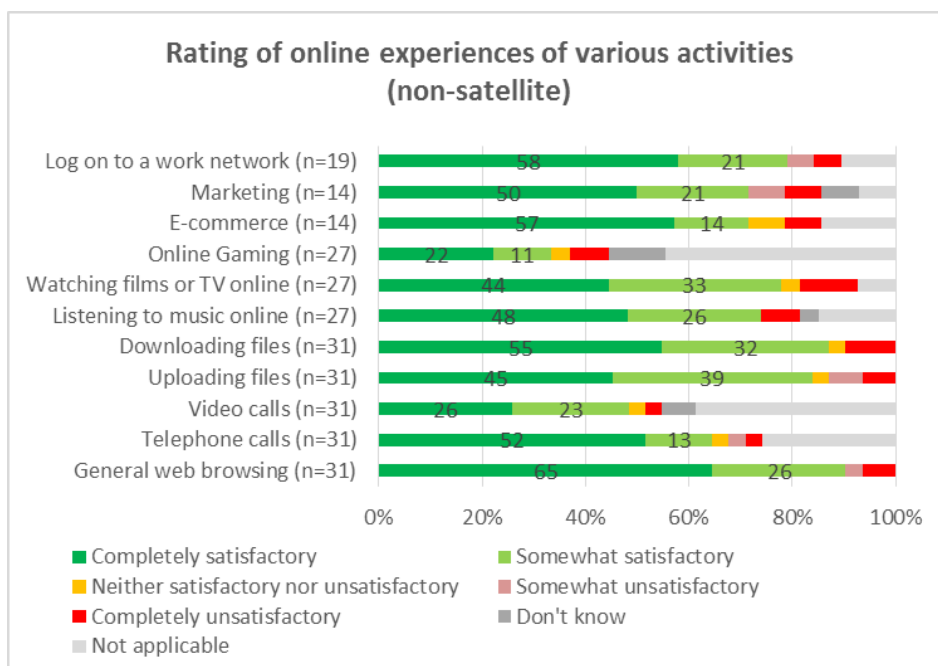
- There were a total of 93 responses to the survey and just over one third (32, 35%) were in one of two non-satellite pilots.
- Two thirds (21, 66%) of the non-satellite group purchased speeds of 30MBbps.
- In the main, respondents appeared satisfied with the new broadband performance for personal/leisure, study, business and flexible home working. See Figure B1.

Figure B 1 - Satisfaction with non-satellite broadband performance



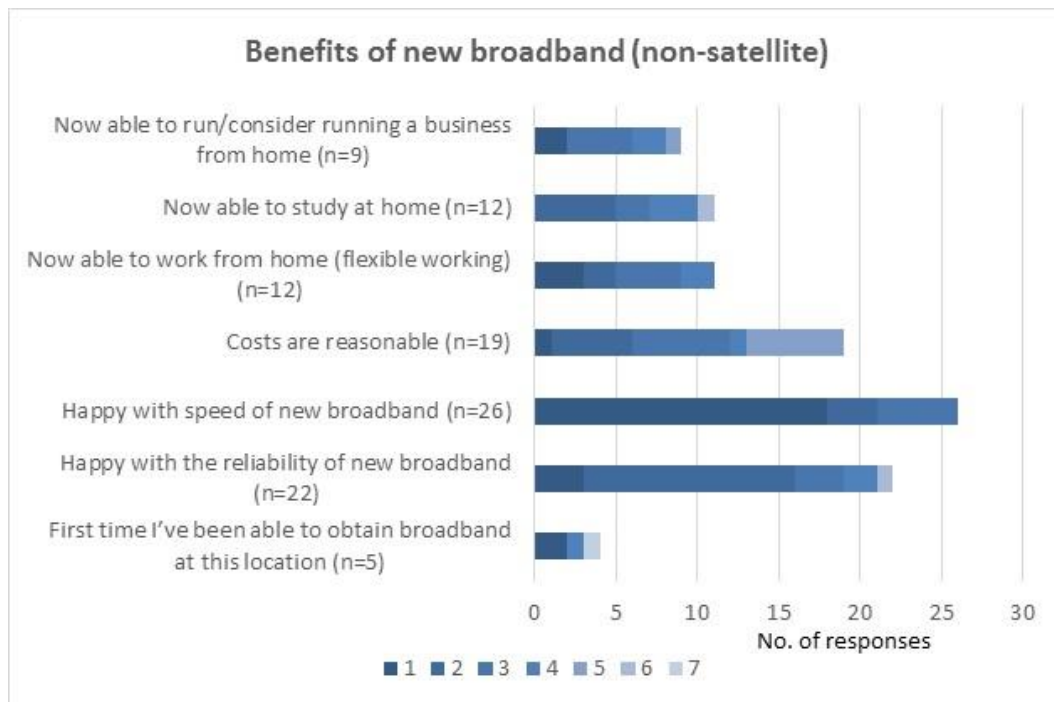
- Looking in detail at the online experiences of various activities, satisfaction levels generally appeared quite high for general web browsing, uploading and downloading files. Respondents appeared somewhat less satisfied with online gaming. See Figure B2.

Figure B 2 - Rating of online experiences of various activities (non-satellite)



- The majority (28, 93%) considered that there were benefits of their new broadband.
- Respondents were asked to select from a list of potential benefits, ordering their choices, with 1 being the main benefit and 2 being the next in importance. They were able to rate as many or as few as they wished. The most popular benefits expressed were speed, reliability and cost. See Figure B3.

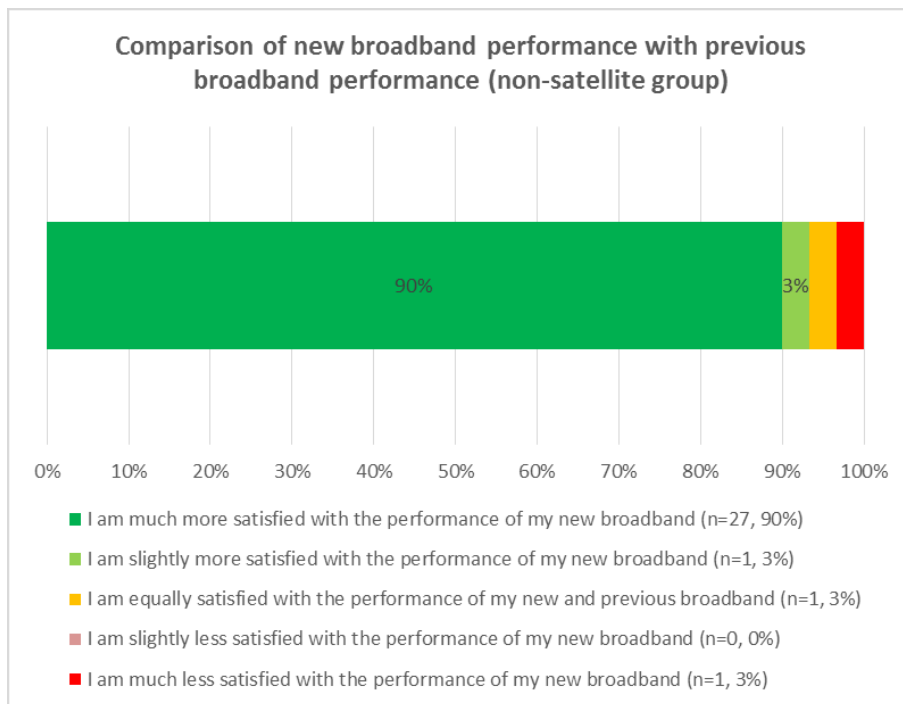
Figure B 3 - Benefits of new broadband (non-satellite)



- Just over half (16, 53%) thought there were drawbacks of the new broadband, 13 (43%) did not think there were any drawbacks and one (3%) didn't know.
- The main drawback was cost. Seven respondents rated this as their main drawback. Six respondents rated reliability as their main or second drawback.

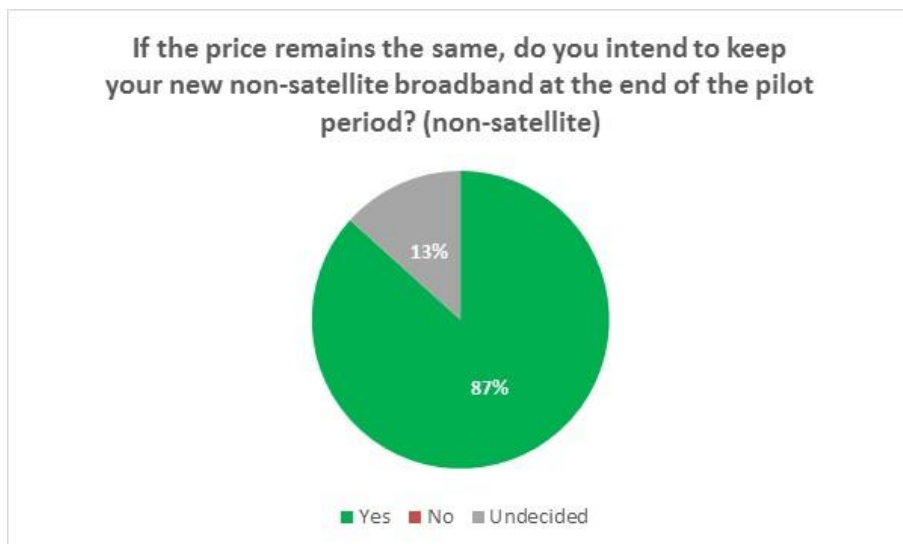
- The majority of respondents were more satisfied (28, 93%) with the performance of their new broadband compared with their old. See Figure B4.

Figure B 4 - Comparison of new with previous broadband performance (non-satellite)



- If the price remains the same, the vast majority of respondents (26, 87%) intend to keep their new broadband at the end of the pilot period. See Figure B5.

Figure B 5 - Intention to keep new non-satellite broadband at the end of the pilot period



Annex C

Table C 1 – Broadband package purchased

Satellite package	Number of responses
Monthly data allowance: 20GB; Speed: 10Mbps	34
Monthly data allowance: 30GB; Speed: 24Mbps	9
Monthly data allowance: 5GB; Speed: 25Mbps	3
Monthly data allowance: 20GB; Speed: 25Mbps	1
Monthly data allowance: 40GB; Speed: 30Mbps	12
Other – 10GB; 10 Mbps	1
Other – 50GB; 30 Mbps	1
Total	61
Non-satellite package	Number of responses
Monthly data allowance: 40GB; Speed: 30Mbps	3
Monthly data allowance: 200GB; Speed: 30Mbps	7
Monthly data allowance: 40GB; Speed: 30Mbps	1
Monthly data allowance: Unlimited; Speed: 10Mbps	7
Monthly data allowance: Unlimited; Speed: 30Mbps	10
Monthly data allowance: Unlimited; Speed: 50Mbps	2
Other - 8Mbps	1
Other - Unlimited data; 20Mbps	1
Total	32

Table C 2 - 'Other' reasons for being dissatisfied with broadband performance

Broadband use	Verbatim reasons for being dissatisfied with broadband performance
Personal/leisure	We are not getting the high download speeds we had been led to expect and the system has already failed completely several times
	It is not much better than get the old service and quite often I have no internet and have to switch back to old network.
	The service is very good for streaming but for web browsing it appears to be a little intermittent and also affected by weather conditions
	Connection often goes off, this is very frustrating when you are making a purchase. Speed is still very slow.
	40gb is not enough
	Too expensive monthly for data you get. Bt £5/ month unlimited slow but you never get cut off or charged more, downloads unlimited
	Frequently unable to access the network/ internet. When I can, speed is slow and pages often do not load properly.
	Slow speed, lack of data control
Study use	No I'm not
	Expected speed has not materialised and system has failed completely on several occasions.
	Frequently unable to access the network/ internet. When I can, speed is slow and pages often do not load properly.
Business use	40gb is not enough
	Download speeds expected have not materialised and system has totally failed on several occasions. No 24 hour service for faults!
	not enough data
	slow speed, lack of data control
	Frequently unable to access the network/ internet. When I can, speed is slow and pages often do not load properly.
Flexible home working	not enough data
	Download speeds we had been led to expect have not materialised and system has failed totally on several occasions. No 24 hour response to fault queries!

Table C 3 - 'Other' benefits of new broadband

'Other' benefits (verbatim)
Dozy farmer can't plough through the cable with his rubbish driving!
Faster than the bt speed
Data Allowance
Able to get a higher data allowance
Able to do research for house renovation/building extension
It is faster and cheaper than our old supplier, but it is still expensive and slower than conventional broadband
Now able to stream movies
Can now stream films
Able to download updates for computer programs
Just much more reliable and quicker
No Dish
Better than previous supplier (BT)

Table C 4 - 'Other' drawbacks of new broadband

'Other' drawbacks (verbatim)
Unable to use other ISP e,g, Sky
If broadband goes down loose phone connection and customer services poor if it goes wrong
Wifi range
Not enough data
A lot faster but not fast enough
Some extra cost
Don't know my usage
To get fast speed costs significantly more.
Was using too much so i have had to upgrade to more Gbps but not getting a faster speed which i should have
Stalls on an Ipad
With previous poor speed we had no idea how much usage we needed
Costly data limits
Costs OK but not comparable with landline broadband packages ie need to spend additional money to get telephone service
Lack of ability to monitor data use from Avanti
No 24 hour response to faults!
Very large and ugly dish

Table C 5 – Previous broadband supplier

Previous broadband supplier	Number of responses	Percentage
BT	41	51%
Talk Talk	7	9%
Plus Net	8	10%
Qsat	8	10%
Too Way	2	3%
South West Internet	2	3%
Zen	1	1%
Sky TV	1	1%
Sky (via Openreach)	1	1%
Satellite broadband with same provider	1	1%
3 Mobile	1	1%
Virgin Media DSL service	1	1%
EE	1	1%
Satuk	1	1%
Claranet	1	1%
Avanti	1	1%
Europasat	1	1%
None	1	1%
Total	80	100%