Household Survey Findings Report

Evaluation of the Superfast Broadband Programme

Ipsos

Contents

1 Summary of key findings

Ipsos were commissioned by Building Digital UK (BDUK), an executive agency of the Department for Science, Innovation and Technology (DSIT) to undertake an evaluation of the Superfast Broadband programme. As part of this evaluation, a longitudinal survey of households was utilised to improve understanding of the wellbeing and social benefits of the programme.

This section of the report presents a summary of the findings from the household survey which was undertaken at two points in time – before and after the Superfast Broadband Programme was implemented in "delivered to" areas. It provides a narrative of the responses of residents living in two sample areas – 'not delivered to' where superfast broadband has not been delivered and 'delivered to' areas where superfast broadband has been delivered to between the two waves of the survey, and a summary of how the key findings relate to the Superfast Broadband Programme Theory of Change for households.

We were able to compare data on the behaviour, attitudes, and characteristics of each sample area, and the impact of the Superfast Broadband Programme.

This section summarises any significant differences between residents living in delivered to and not delivered to areas.

In summary, the survey demonstrates that the Superfast Broadband Programme has had a significant impact on connection speeds and satisfaction with connections. However, it also shows that the enhanced connectivity has not had a large impact on the frequency at which people go online, and in most cases not altered what types of activities people are going online for. This suggests people in not delivered to areas are still accessing the internet for similar things, but their satisfaction with their connection in doing so is lower.

The provision of enhanced connectivity has had some positive impacts on residents, most notably through supporting more Working from Home, allowing more individuals to stream online content, and stay in touch with family and friends more easily. These outcomes should contribute to an improvement in the subjective wellbeing of residents – however the survey provides mixed evidence in this regard. Those reporting that they have upgraded felt that enhanced connectivity does support an improvement in their wellbeing, but this does not translate into a significant change in subjective wellbeing measures, and there is no significant difference between the change in subjective wellbeing scores of the respondents in delivered to and not delivered to areas.

1.1 Internet use

There has been no change in the *overall frequency* of going online between the baseline and the follow-up survey for both delivered to and not delivered to groups, with the majority stating that there has been no change in usage compared to six months, one and two years prior to the surveys (71% in delivered to areas and 74% in not delivered to areas reported no change in usage compared to six months before the follow-up survey).

However, **there has been an uplift in the number of internet enabled devices used in the home** in both delivered to and not delivered to areas, with around three -quarters of residents (73% in not delivered to areas and 74% in delivered to areas) stating that they had four or more devices in the follow-up survey. In the baseline survey, these proportions were 65% and 67% respectively.

Activities where there were significant differences between the baseline and follow-up surveys included:

- **The frequency of keeping in touch with friends online at least once a day**, which decreased among residents in the not delivered to areas from 65% in the baseline survey to 57% in the follow-up survey. This proportion did not significantly change in the delivered to areas (62% in the baseline survey and 64% in the follow-up survey).

- **Using online methods to study or learn at home,** where residents in not delivered to areas were also significantly less likely to state they do not use online methods (34% in the follow-up survey) compared to residents in delivered to areas (25% in the follow-up survey). At baseline, the proportions for the two areas were not significantly different from one another (34% in not delivered to areas and 30% in delivered to areas), suggesting the provision of enhanced broadband has increased the use of online methods to support learning.

1.2 Broadband connection

Residents in both the delivered to and not delivered to areas saw rises in the estimated and actual speed of the home internet connection, but this was more marked in the delivered to areas. Actual speeds reported in the follow-up survey were*:*

- 330 Mbps or above – 5% of not delivered to areas, a 2 percentage point increase from the baseline survey, compared to 13% of delivered to areas, a 10 percentage point increase from the baseline survey.

- 80 Mbps or above but below 330 Mbps – 16% of not delivered to areas, a 13 percentage point increase from the baseline survey, compared to 35% of delivered to areas, a 32 percentage point increase from the baseline survey.

- 24 Mbps or above but below 80 Mbps – 17% of not delivered to areas, a 6 percentage point increase compared to the baseline survey, compared to 19% of delivered to areas, a 13 percentage point increase from the baseline survey.

- The mean connection speed reported by those completing a speed test increased from 20.25 Mbps at the baseline survey to 63.24 Mbps at the follow-up survey in not delivered to areas, and from 20.02 Mbps at the baseline survey to 116.92 Mbps at the follow-up survey in delivered to areas.

When comparing their internet speed with speeds available in their local area, there was an increase in the proportion of respondents in delivered to areas stating there were faster speeds available in their area than the connection they have between the baseline survey (32%) and

follow-up survey (40%). This change in proportions was not matched in not delivered to areas, where there was an increase in residents stating they had the fastest speed available in their area (from 43% in the baseline survey to 53% in the follow-up survey). This, coupled with the findings above about the changes in reported connection speeds in the two areas, suggests there are faster broadband speeds available in the areas the Superfast Broadband Programme has delivered to, and that despite households not taking the fastest speed available to them, these connections are faster than they could have accessed in the absence of the Superfast Broadband Programme.

Residents were asked to rate their existing broadband overall. Whilst both delivered to and not delivered to areas saw a positive improvement in perceptions, it was residents in the delivered to areas who were most positive. In the follow-up survey, 42% stated that it was very good, an increase of 35 percentage points compared to the baseline survey and the most common response for delivered to areas. In not delivered to areas 22% stated very good, an increase of 14 percentage points from the baseline survey. However, 31% in not delivered to areas still reported that their internet connection was very poor in the follow-up survey, and this was the most common response. At baseline in both the delivered to and not delivered areas the most common response to rating their internet connection was very poor.

Reflecting this positive result, perceptions of different elements of their connectivity were significantly better and more improved from the baseline survey in the delivered to areas compared to the not delivered to areas:

- **Speed** – in delivered to areas 41% stated very good, a 34 percentage point increase compared to the baseline. In not delivered to areas, 22% stated very good, a 14 percentage point increase. Residents in the delivered to area were also far more likely to state in the follow-up survey that it had got a lot better (37%) compared to the baseline survey (6%).

- **Reliability** – in delivered to areas 43% stated very good, a 33 percentage point increase from the baseline survey. In not delivered to areas 26% stated very good, a 16 percentage point increase from the baseline survey.

Both areas saw improved ratings for perceived value for money, but the uplift between the baseline and the follow-up survey was far greater in the delivered to areas. In the follow-up survey, 23% of those in delivered to areas stated it was very good (an increase of 17 percentage points) compared to 16% in the not delivered to areas (an increase of nine percentage points).

1.3 Upgrading

Both the delivered to and not delivered to areas showed an increase in the share of residents who had upgraded their internet connection to one that was faster or better at the follow-up survey, although the proportion is significantly higher in the delivered to areas (69%) compared to not delivered to areas (51%). The uplift is also greater in delivered to areas, with an increase of 43 percentage points from the baseline survey compared to an increase of 16 percentage points from the baseline survey in the not delivered to areas.

The speed of internet connection was the most common reason for upgrading in delivered to areas. There was a rise in the proportion that heard about opportunities to upgrade from their internet provider from 53% in the baseline survey to 73% in the follow-up survey.

For individuals that reported they had upgraded their connection in delivered to areas, there was a perceived positive impact of the faster connection on being able to do the following:

- **Ease of keeping in touch with friends and family** from 54% in the baseline survey to 66% in the follow-up survey.
- **Watching entertainment programmes and content** from 61% in the baseline survey to 82% in the follow-up survey.

1.4 Attitudes to going online

Among those who had upgraded their internet connection, there were some statistically significant changes. Specifically, more residents in the follow-up survey:

- Strongly agreed that doing things online saves time, from 49% in the baseline survey to 55% in the follow-up survey in delivered to areas.
- Strongly agreed that being able to do things online makes life easier, from 54% in the baseline survey to 58% in the follow-up survey in delivered to areas.
- Agreeing that they felt addicted to going online, from 17% in the baseline survey to 23% in the follow-up survey in delivered to areas.

1.5 Wellbeing measures

The wellbeing scores for residents living in each of the sample areas remain unchanged. However, in delivered to areas there was a positive shift in the reported impact of upgrading the internet connection on wellbeing from 38% in the baseline survey to 48% in the follow-up survey.

It was also the case that the proportion who stated that they feel the things they do in life are worthwhile improved. The proportion of residents in delivered to areas achieving a high score (7 to 8 out of 10) increased from 42% in the baseline survey to 48% in the follow-up survey. This change was not observed in the not delivered to areas.

The proportion of residents in delivered to areas are also significantly more likely to state that they 'never' feel lonely compared to the not delivered to areas. (46% vs. 37%).

1.6 Estimated impact of the Superfast Broadband Programme

- The Superfast Broadband Programme has had a positive impact on:
  - **Internet connection speeds:** The average speeds for households in delivered to areas has increased at a faster rate than for those in not delivered to areas. Where households provided their actual speeds via a speed test at both the baseline and follow-up waves of the survey, actual speeds increased by between 24% and 56%.

Where speeds were provided as a band, the provision of Superfast Broadband coverage increased the provision of Superfast Broadband Programme coverage led to an increase in the probability of being in a higher speed band by between 46% and 92%.

- **Satisfaction with internet connection:** There has been an improvement in the levels of reported satisfaction with internet connection for households in delivered to areas. The provision of the Superfast Broadband Programme coverage has led to an increase in the probability of the household being in a higher satisfaction band by between 30% and 45%.

- **Improvements in reliability:** There has been an improvement in the levels of reported reliability of the internet connection for households in delivered to areas. The provision of the Superfast Broadband Programme coverage has led to an increase in the probability of the household being in a higher satisfaction band by between 21% and 29%.

- **Improvements in perceived value for money of internet connections:** There has been an improvement in the levels of reported value for money of the internet connection for households in delivered to areas. The provision of the Superfast Broadband Programme coverage has led to an increase in the probability of the household being in a higher value for money satisfaction band by between 26% and 38%.

- **Improvements in overall rating of the internet connection:** There has been an improvement in the levels of reported rating of the internet connection for households in delivered to areas. The provision of the Superfast Broadband Programme coverage has led to an increase in the probability of the household being in a higher rating band by between 31% and 45%.

- **There are no statistically significant increases in self-reported wellbeing measures** as a result of the Superfast Broadband Programme for four of the five wellbeing measures – life satisfaction, feeling worthwhile, happiness, and loneliness. There was a slightly positive impact on feelings of anxiety (at the 90% significance level) in two of the three model specifications, indicating the programme may have had a positive effect on levels of anxiety. The provision of the Superfast Broadband Programme is estimated to have led to an improvement in the anxiety wellbeing score of between 0.7 and 1 – however, the number of responses included in the analysis of this outcome is much lower than for the other wellbeing measures. It is unclear if the lack of statistically significant results were a result of the Programme having no impact on wellbeing or if the measures used are insufficiently sensitive to small, and potentially temporary changes to wellbeing. Therefore, alternative approaches to estimating the public benefit of the Superfast Broadband Programme have been used in the evaluation.

- **There appears to be a slight impact of the provision of Superfast Broadband Programme on the ability to Work from Home (WFH).** The provision of the Superfast Broadband Programme is estimated to have led to an increase in the number of days

WFH of between 0.7 and 0.8 days per week. However, the sample for this analysis is relatively low, as it only includes those that were employed in both waves of the survey.

- **It is estimated that there has been no impact from the provision of superfast broadband on commuting time, despite the increased prevalence of WFH.** This could be due to residents in delivered to areas having longer commutes when they go to their workplace now compared to the baseline survey, or due to rebound effects, with residents in delivered to areas still making journeys such as commuting for school drop offs or administrative tasks.

- There appears to have been a slightly negative **impact of the provision of Superfast Broadband on volunteering frequency** (at the 90% Confidence Level). The provision of the Superfast Broadband Programme is estimated to have led to a reduction in frequency of residents volunteering by between 25% and 32%.

The table below presents how the results of the longitudinal survey provide evidence to support the effect the Superfast Broadband Programme has had on the key outcomes and impacts set out in the Theory of Change.

Table 1.1: Summary of key findings from the household survey

Outcome	Evidence from longitudinal survey
Take-up of enhanced broadband connection	Strong evidence that Programme has contributed to this outcome: ▪ Larger proportion of respondents in delivered to areas report upgrading connection than in not delivered to areas. ▪ Delivered to area report higher connection speeds than not delivered to areas.
Improved access to services and businesses	Weak evidence that Programme has contributed to supporting access to public services and businesses: ▪ No evidence of changes in proportion of respondents accessing businesses or public services online ▪ Self-reported positive impact of upgrading broadband connection on managing day to day life
Working from home	Strong evidence that the provision of enhanced broadband connectivity has supported WFH: ▪ The provision of the Superfast Broadband Programme is estimated to have led to an increase in the number of days WFH of between 0.7 and 0.8 days per week.
Improved consumer choice	Weak evidence of improvements in consumer choice as a result of enhanced connectivity: ▪ Increase in proportion of respondents that have used a price comparison website in delivered to areas, not observed in not delivered to areas.
Improved ability to stream content	Strong evidence that improved connectivity has supported ability to stream content: ▪ For individuals that reported they had upgraded their connection in Superfast Broadband areas, there was an increase in the proportion reporting that their connection supported them watching entertainment programmes and content.
Volunteering	No evidence that improved connectivity has had a positive impact on volunteering – in fact some indications that there may be a negative relationship.
Self-management of health conditions	No evidence of improvements in ability to manage health: There was an increase in ordering prescriptions online in delivered to areas (also seen in not delivered to areas), and a small increase in researching health conditions, ▪ There was a decrease in attending online healthcare appointments, seen in both delivered to and not delivered to areas.
Social isolation	Strong evidence that the provision of enhanced connectivity reduces social isolation: ▪ Respondents in delivered to areas were more likely to say they never felt lonely than those in not delivered to areas

Outcome	Evidence from longitudinal survey
	▪ There was a positive change in the frequency of keeping in touch with friends online at least once a day in delivered to areas compared to not delivered to areas. ▪ An increase in the proportion of those that have upgraded connections in delivered to areas that report an increase in the ease of keeping in touch with friends and family.
Impact on health	No evidence of impact on health.
Leisure time	No evidence of an impact on leisure time.
Studying	Mixed evidence on the impact on studying: ▪ Most respondents stated that upgrading their connection made no difference. ▪ However, residents in not delivered to areas were significantly less likely to use online methods to study or learn at home. ▪ Additionally, respondents upgrading their connection in delivered to areas reported that enhanced connectivity is less likely to have a negative impact on the ability to study than in not delivered to areas.
Wellbeing	Mixed evidence on the impact of enhanced connectivity on wellbeing: ▪ Standard ONS wellbeing questions show no change in measures over time or between delivered to and not delivered to areas. ▪ However, in the household survey there was a positive shift in the reported impact of upgrading the internet connection on wellbeing in delivered to areas.

2 Introduction

Ipsos were commissioned by Building Digital UK (BDUK), an executive agency within the Department for Science, Innovation and Technology (DSIT) to undertake an evaluation of the Superfast Broadband programme. As part of this evaluation, a longitudinal survey of households was utilised to improve understanding of the wellbeing and social benefits of the programme. This report sets out the findings from the household survey.

2.1 Background

The Superfast Broadband Programme was announced in 2010 in response to concerns that the commercial deployment of superfast broadband infrastructure would fail to reach many parts of the UK. The Government established the programme to fund network providers to extend provision to areas where deployment was not commercially viable, on the expectation that doing so would result in economic, social and environmental benefits.

2.1.1 Longitudinal survey

The longitudinal survey of households is one strand in the broader evaluation of the Superfast Broadband Programme (see table below) and is designed to explore the social outcomes and to collect information and data relating to the relevant aspects of the BDUK benefits framework related to public value, specifically improved quality of life and wellbeing and consumer savings.

Table 2.1: Superfast Broadband evaluation: data collection table

Evaluation	Management Information	Longitudinal household survey	Stakeholder consultations	Public service delivery case studies	Secondary data sources
Reducing the digital divide	✓			✓	✓
Economic impacts	✓				✓
Social and public value impacts		✓			✓
Public sector impacts		✓		✓	✓
Financial analysis	✓		✓		
Market analysis			✓		✓

2.2 Methodology

The aims and objectives of the Superfast Broadband Programme evaluation focussed on four main evaluation questions:

- Question 1: What are the outcomes of the scheme?

- Question 2: How has the behaviour of individuals / organisations changed for these outcomes to come about?
- Question 3: How effective and efficient has the delivery of the Programme been?
- Question 4: Was the investment cost effective?

To fully answer the first two evaluation questions, and to collect evidence of the key outcomes described in the Theory of Change, a longitudinal survey was designed to involve a selection of areas in network providers build plans that were expected to receive subsidised coverage, and residential addresses for households which did not have superfast broadband coverage and were not expected to receive it from the Superfast Broadband Programme.

The survey involved conducting research with households at two time points: before the Superfast Broadband Programme delivered new broadband infrastructure in the area in the build plan areas, and at the same time in the areas not expected to receive Superfast Broadband coverage. This research was conducted between November 2021 and January 2022 and a total of 1,822 residents took part. A follow-up survey was completed two years afterwards, between November 2023 and February 2024, when the Superfast Broadband Programme had delivered infrastructure to those premises in the build plans. A total of 839 residents took part. The time lag between the waves of research allowed the opportunity for intermediate outcomes linked to take-up to become evident. By recontacting the same households to complete a follow-up interview, any "between-subjects variation" (i.e. variation arising from interviewing different individuals) was controlled for (as the same individuals were interviewed), allowing for changes to be detected over time. Any national contextual changes should apply to all households in both groups.

The survey was interviewer-administered either face-to-face (in-home or on the doorstep) or via telephone or MS Teams[1] (see Annex A for contact procedures).

2.2.1 Sampling

The addresses for the survey were sampled at random[2] with the aim of achieving interviews with residents living in two types of areas:

- 'Not delivered to areas' where superfast broadband has ***not*** been delivered to and was not expected to be delivered to by the Superfast Broadband Programme.

[1] The choice of face-to-face, telephone and MS Teams was designed to provide a choice of methods for interviews and participants in response to Covid-19. The MS Teams option was not offered for the follow-up survey, as there were no Covid-19 related restrictions and there was limited take-up of this mechanism in the baseline stage.

[2] Random probability sampling i.e. every unit in the population (in this case, an address) has an equal chance of being selected for the sample, and the probability of selection for any unit in the population is either known or could be calculated. Effectively, everyone in the population has a known and non-zero chance of being selected. This allows us to generate a representative sample of our target population.

- ‘Delivered to areas’ where superfast broadband connectivity was not available at baseline but was available to households when the follow-up survey was conducted as a result of the Superfast Broadband Programme.

The two samples (not delivered to and delivered to) were selected using Programmes Speed and Coverage Templates (SCTs) and C3 reports. Together, these files highlight postcodes where the Superfast Broadband Programme had been delivered to and the planned timings for rolling this out to areas that are not yet delivered to.

The sampling partially utilised a pipeline approach – selecting addresses within the Superfast Broadband Programme area that were expecting connectivity to be delivered within 6-9 months as the ‘delivered to areas’, and areas that the Programme was expecting to provide connectivity to at a later date (over 18 months on from the sampling process) selected as ‘not delivered to areas’. The ‘not delivered to areas’ also includes areas where the Superfast Broadband Programme is not delivering to at any stage, but that do not have access superfast broadband connections, so that there was a sufficiently large sample to draw from.

In each of these areas, non-residential addresses were removed. A random 1 in N sample was drawn within postcode sectors to decrease the chances that addresses issued in each sample area had similar internet access.

The survey sampled anyone aged 18+ permanently resident at the address as eligible to take part (no method was applied to select those adults living in the household), with one resident per address permitted to participate.

2.2.2 Survey content

The survey was designed to collect data on the following:

- Frequency of internet usage in and outside the home and access to internet enabled devices
- Use of the internet (social media, communicating with family/friends, what’s on information, volunteering, work/study, household administration)
- Reasons for not accessing the internet
- Attitudes toward the internet, rating and speed of internet connection, expenditure on internet service, upgrading (reasons for or against, awareness of improvements, impact of upgrading)
- Health in general, exercise, use of health services (use of GPs, accessing health services via internet)
- Wellbeing (life satisfaction, life is worthwhile, happiness, feeling anxious, loneliness)
- Demographics (household composition, age, gender, work status, income, home ownership, social grade)

- Satisfaction with local area and length of time at address

2.2.3 Broadband speed check

As part of the survey, respondents were asked to complete a broadband speed test, this could be completed before or during the interview. The rationale for collecting this data was to avoid relying on the resident's recall and knowledge of their broadband speed. Capturing information about actual broadband speed at each household was essential to support the wider evaluation and to allow for analysis of outcomes and impact.

The broadband speed check involved asking residents to access a weblink (https://broadbandtest.which.co.uk), click 'start your speed test now' and record the download speed of their home internet connection. Interviewers were asked to record the information provided when the speed check was completed.

2.2.4 Weighting

A weighting system was applied to the data. Propensity score matching (PSM) was used to generate weights that adjusted the profiles of the sample in the not delivered to areas (the control group) to be similar to those for the sample in the delivered to areas (treatment group) for a range of measures:

- Gender
- Age
- Social grade (this measure also acts as a proxy for household income)
- Work status
- Tenure
- Rural / urban

The weighting was not designed to ensure that the samples were nationally representative of British adults and as such there are some key differences between the profile of the sample areas and population data.

Key differences between the socio-demographic profile of participants in this baseline survey and the national population are included in the narrative where available.

2.2.5 Interpreting the data

Survey results are subject to sampling tolerances, which vary with the size of the sample and the percentage figure concerned. Differences between the sample areas and time periods have been highlighted where statistically significant at the 95% level of confidence (see example in the table below).

Significant difference is indicated using letters. Each column has a letter - for example not delivered to (A) and delivered to (B) - if a percentage has a letter next to it, it means this figure is statistically significantly higher than the figures in the stated columns (at a 5% significance

level). In the example table below, the proportion of residents in not delivered to areas describing the “value for money” of the home internet connection as a lot worse than 12 months previous (14% in column A), is significantly higher compared with residents in delivered to areas (10% in column B), therefore the letter ‘B’ is added to indicated that column A is higher than column B.

In addition, the proportion of residents in delivered to areas describing the “value for money” of the home internet connection as a lot better than 12 months previous (18% in column B1) has both ‘A1’ and ‘B’ added. This means that the proportion of respondents in the follow-up survey in delivered to areas stating that the value for money improved is significantly higher than the proportion of respondents in delivered to areas at the baseline, and is also significantly higher than the proportion of respondents in the follow-up survey in not delivered areas. Comparisons are only made between variables within the same row.

Table 2.2: Comparing the value for money of the home internet connection over the past 12 months

Comparing the value for money of the home internet connection over the past 12 months	Not delivered to baseline (A)	Delivered to baseline (B)	Not delivered to follow-up (A1)	Delivered to follow-up (B1)
A lot better	4%	2%	2%	18% (A1/B)
A little	6%	7%	7%	19% (A1/B)
No change	60%	63%	63% (B1)	45%
A little worse	13%	12%	12%	11%
A lot worse	14% (B)	10%	10% (B1)	6%

Percentages that are greater than 0 but under 0.5% are indicated using * throughout. Please note that answers may not sum to totals because of weighting and computer rounding, because multiple responses were possible to some questions or survey participants preferred not to answer. Numbers are indicated using ‘n’ throughout.

2.3 About this report

This report provides a detailed narrative of the survey findings, comparing responses from each sample area and time period. This report covers the following areas:

- Section 3 covers internet use: frequency of going online and internet devices used in the home.
- Section 4 covers specific uses of the internet: online activities, including keeping in touch with friends and family, finding out what’s on, using the internet for work or study, managing day-to-day life and health.

- Section 5 covers home broadband connection: rating the speed, reliability, and value for money of the connection. Estimating download speeds and how these compare to the previous 12 months and the local area.
- Section 6 covers upgrading: impacts and perceived benefits of upgrading and reasons for not upgrading.
- Section 7 covers attitudes to going online: perceived advantages and disadvantages of going online.
- Section 8 covers wellbeing: satisfaction with life, feeling worthwhile, happiness, levels of anxiety and loneliness.
- Section 9 covers non-internet users: socio-demographic profile of residents who never go online nowadays, their reasons for choosing not to go online and the impact it has on their lives.
- Section 10 covers the estimated impact of the Superfast Broadband Programme: results of the statistical analysis aiming to demonstrate the impact of the Superfast Broadband Programme on key household outcomes.
- Annexes: additional information and data collected. Annex A includes the socio-demographic profile of internet users such as gender, age, social grade, educational attainment, working status, time spent commuting and working from home, household income, tenure, and general health and fitness activity. Annex B includes the length of residence in local area and perception of the local area over the past 12 months. Annex C contains contact procedures. Annex D includes the socio-demographic profile of the unweighted sample and unweighted profile of the re-contact sample. Finally, Annex E includes a description of the analytical framework used to assess the impact of the Superfast Broadband Programme.

3 General internet use

This chapter focuses on how often residents go online and use their home internet connection. Residents in not delivered to and delivered to areas were asked about how often they use their internet at home nowadays compared with 6 months ago and 12 months ago. This chapter concludes by exploring the internet-enabled devices residents have access to in their household and which they can use to go online.

3.1 General frequency going online anywhere

For both areas, there has been no change in the overall frequency of going online.

In the follow-up survey, almost nine in ten residents reported going online nowadays more than once a day, either at home or elsewhere (88% in not delivered to and 87% in delivered to areas). A very small proportion never go online nowadays (3% in not delivered to and 2% in delivered to areas).

In delivered to areas, there were no changes between the two waves of the survey; 88% in the baseline survey and 87% in the follow-up survey reported going online nowadays more than once a day. Similarly, there were no changes in not delivered to areas; 86% in the baseline survey and 88% in the follow-up survey reported going online nowadays more than once a day.

Table 3.1: Frequency of going online nowadays at home and elsewhere

Frequency of going online nowadays at home and elsewhere	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
More than once a day	86%	88%	88%	87%
Once a day	5%	4%	5%	9%
Less often than once a day	4%	5%	3%	2%
Never	4%	3%	4%	2%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

3.1.1 General frequency going online at home

The frequency of going online at home has increased in not delivered to areas but not in delivered to areas.

In the follow-up survey, a similar proportion of residents across both areas said they went online at home via their home internet connection more than once a day (88% in not delivered to areas and 87% in delivered to areas). In delivered to areas this was consistent with the baseline survey findings (89%). However, in not delivered to areas residents were less likely to say they went online everyday at the baseline survey (80%). Residents in delivered to areas

were more likely to say they went online once a day at home (9%) than not delivered to areas (4%). The proportion of residents who never accessed the internet, or did so only via their mobile phone service provider or portable devices (for example, a dongle), were more likely to be in not delivered to areas (4%) than delivered to areas (1%).

These findings were broadly consistent with the ONS Opinions and Lifestyle Survey, 2020[3], which reported that 89% of British adults used the internet daily or almost every day.

Table 3.2: General frequency of going online at home

General frequency of going online at home	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
More than once a day	80%	88% (A)	89% (A)	87%
Once a day	6%	4%	6%	9% (A1/B)
Less often than once a day	7% (B)	4%	4%	3%
Never/I only go online via a mobile phone service provider	7% (A1/B)	4% (B1)	1%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (887), Delivered to (862), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (436), Delivered to (381), 20/11/2023 – 17/03/2024
** denotes under 1%*

3.2 Changes in internet use at home

This section describes how often residents in not delivered to and delivered to areas recalled using their internet at home nowadays compared with six and 12 months ago. It should be noted that the baseline fieldwork took place during the Covid-19 pandemic, when some restrictions were in place, whereas the follow-up fieldwork took place when all Covid-19 restrictions had been lifted.

3.2.1 Changes in internet use at home in the past six months

Both the delivered to and not delivered to areas have seen a fall in the proportion of residents stating that they go online more often compared to six months ago between the baseline and follow-up survey.

There were no differences between the two areas in the follow-up survey. The majority state that there has been no change in their internet use compared to six months ago (71% in delivered to areas compared to 74% in not delivered to areas) and the proportions stating that they use the internet more often than they did six months ago has significantly fallen in both

[3] Opinions and Lifestyle Survey (2020). Adults 16+ in Great Britain, online and telephone survey, sample 4,700.

areas (by 12 percentage points in the not delivered to areas and seven percentage points on the delivered to areas).

Table 3.3: Changes in going online nowadays compared with six months ago

Changes in internet use at home nowadays compared with 6 months ago	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
More often now	34% (A1)	22%	32% (B1)	25%
Less often now	5% (B)	4%	3%	3%
No change	59%	74% (A)	65% (A)	71% (B)
Don't know	2% (A1/B)	*%	1%	2%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

3.2.2 Changes in internet use at home in the past 12 months

Both the delivered to and not delivered to areas have seen a fall in the proportion of residents stating that they go online more often compared to 12 months ago.

When residents compared their internet usage at home nowadays to their usage 12 months ago, again there were no differences between the two areas in the follow-up survey. Around two-thirds said their usage had not changed (65% in both areas). Three in ten used the internet at home more often nowadays (30% in not delivered to areas and 29% in delivered to areas). A small proportion said they now use the internet at home less regularly (4% in not delivered to areas and 5% in delivered to areas).

In delivered to areas, there was a fall in the proportion of residents who said they use the internet at home more regularly than they did 12 months ago (36% in the baseline survey and 29% in the follow-up survey). There was no significant shift in the proportion that said there was no change (61% in the baseline survey and 65% in the follow-up).

In not delivered to areas, there was also a fall in the proportion of residents who said they use the internet at home more regularly than they did 12 months ago (37% in the baseline survey and 30% in the follow-up survey). The proportion that said there was no change increased from the baseline survey (57%) to the follow-up survey (65%).

Table 3.4: Changes in going online nowadays compared with 12 months ago

Changes in going online nowadays compared with 12 months ago	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
More often now	37% (A1)	30%	36% (B1)	29%
Less often now	6% (B)	4%	3%	5% (B)
No change	57%	65% (A)	61%	65%
Don't know	*%	0%	*%	1% (A1/B)

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

Finally, in the follow-up survey only residents were asked whether they had changed how often they go online compared to 24 months ago. Whilst the majority stated that they had not changed their online consumption (51% in the delivered to areas and 56% in the not delivered to areas), around two-fifths stated that they went online more often compared to two years ago (43% in the delivered to areas and 38% in the not delivered to areas).

Table 3.5: Changes in going online nowadays compared with 24 months ago

Changes in going online nowadays compared with 24 months ago	Follow-up Not delivered to (A1)	Follow-up Delivered to (B1)
More often now	38%	43%
Less often now	6%	6%
No change	56%	51%
Don't know	1%	*%

Source: Household survey of adults aged 18+
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

3.3 Internet enabled devices used in the home

There has been an uplift in the number of internet enabled devices used in the home in both delivered to and not delivered to areas.

In the follow-up survey, around three in four residents had access to at least four internet-enabled devices (73% in not delivered to areas and 74% in delivered to areas) which is a significant increase compared to the baseline survey (65% and 67% respectively).

In both cases this appears to be driven by an increase in the use of a tablet or e-reader, up by nine percentage points to 77% in the not delivered to areas and an increase of eight percentage points to 77% in the delivered to areas. However, in not delivered to areas, there

was also an increase in the proportion of residents that used a set top box for TV, from 48% at the baseline to 54% at the follow-up.

Residents across both types of area had the same types of internet-enabled devices, shown in the table below. The two most common devices were smart phone(s) and/or a personal computer. The least common devices were digital media players and/or a games console, albeit a third of residents across both areas had these devices in the home.

Table 3.6: Internet enabled devices used in the home

Internet enabled devices used in the home	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Smart phone(s)	93%	95%	94%	95%
A personal computer	88%	86%	87%	87%
A tablet or e-reader	68%	77% (A)	69%	77% (B)
A smart/connected TV	64%	62%	62%	66%
A set top box for TV	48%	54% (A)	49%	48%
An internet-connected digital media player	35%	38%	34%	37%
An internet-connected games console	30%	30%	30%	30%
Any other devices	36%	36%	32%	35%
None of these	*%	*%	*%	0%
Don't know	0%	0%	*%	0%
NET: 1 Device	3%	4%	4%	2%
NET: 2 Devices	12% (A1)	5%	11%	9% (A1)
NET: 3 Devices	20%	19%	18%	15%
NET: 4 Devices or more	65%	73% (A)	67%	74% (B)

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (422), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

4 Specific internet use

This chapter focuses on residents who go online using their home internet connection and their specific internet uses. It explores the online methods that residents in not delivered to and delivered to areas use and how frequently they keep in touch with friends and family, keep up to date with local community events, and volunteer. It also covers which online methods are used to help with work, study or learning, general day-to-day management, and their health.

4.1 Keeping in touch with friends and family

This first section covers the methods used by residents in not delivered to and delivered to areas to keep in touch with family and friends, and how frequently these are used.

4.1.1 Methods used to keep in touch

There have been changes in the way residents are keeping in touch with friends and family. In delivered to areas, use of text messages and online apps increased, while use of email declined. In not delivered to areas, the use of several methods decreased.

In the follow-up survey, residents in the two areas were similar in terms of the methods used to keep in touch with family and friends. The most common methods being: landline/mobile phones (83% in both areas); messages using online apps, (80% in not delivered to areas and 85% in delivered to areas); and text messages (77% in not delivered to areas and 74% in delivered to areas).

Compared to the baseline, there had been changes in the way residents were keeping in touch with friends and family. In delivered to areas, residents were more likely to send messages using online apps in the follow-up survey (85%) than in the baseline survey (77%). They were also more likely to send text messages in the follow-up survey (74%) than in the baseline survey (67%), but were less likely to use email in the follow-up survey (57%) compared with the baseline survey (67%).

In the not delivered to areas, there was a decrease in the use of several methods: email (from 63% in the baseline survey to 52% in the follow-up survey); video chat using Skype, FaceTime, Zoom or another application (from 60% in the baseline survey to 51% in the follow-up survey); and social media sites including Facebook and Instagram (from 49% in the baseline survey to 42% in the follow-up survey).

Table 4.1: Methods used to keep in touch with friends and family that do not live with you

Methods used to keep in touch with friends and family that do not live with you	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Calling them via a landline/mobile phone	79%	83%	78%	83%
Sending messages using online apps	75%	80%	77%	85% (B)
Sending messages using text messaging	73% (B)	77%	67%	74% (B)
Email	63% (A1)	52%	67% (B1)	57%
Video chat using Skype, FaceTime, Zoom or another application	60% (A1)	51%	62%	58%
Using social media sites including Facebook and Instagram	49% (A1/B)	42%	43%	48%
Other	1%	1%	1%	1%
None of these	2%	1%	2% (B1)	0%
Don't know	0%	0%	*%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (422), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

4.1.2 Frequency of going online to keep in touch with friends and family

T*he frequency of keeping in touch with people online did not change in delivered to areas, but frequency declined in not delivered to areas.*

In the follow-up survey, more than half of residents using their home internet connection to keep in touch with friends and family online said they did so at least once a day. This was higher in delivered to areas (64%) than in not delivered to areas (57%).

Whilst in delivered to areas, frequency of contact was consistent between the baseline and follow-up surveys, in the not delivered to areas there was a decrease in the proportion of residents that kept in touch more than once a day, from 41% in the baseline survey to 33% at the follow-up.

Table 4.2: Frequency of going online to keep in touch with friends and family that do not live with you

Frequency of going online to keep in touch with friends and family that do not live with you	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
More than once a day	41% (A1)	33%	40%	39%
Once a day	23%	23%	22%	25%
2-3 times per week	20%	25% (A)	25% (A)	23%
About once a week	7%	11% (A)	7%	7%
About once a fortnight	2%	1%	2%	1%
About once a month	1%	2%	1%	1%
About once every 2-3 months	1%	1%	*%	1%
About once every six months	*%	0%	*%	0%
Less often	3%	2%	2%	2%
Don't know	0%	*%	1% (A)	*%
NET: Once/more than once a day	65% (A1)	57%	62%	64% (A1)
NET: 2-3 times per week	27%	36% (A)	32% (A)	31%
NET: Less often	8% (B)	7%	5%	5%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (820), Delivered to (831), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (417), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

4.2 Involvement in the local community

This section describes the online methods used by residents to find out what is going on in the local community. In addition, it reports types of volunteering done by the residents and how often they do it.

4.2.1 Methods used to find out what is going on in the local community

Both areas saw an increase in some methods for getting information, such as Facebook and talking to friends and/or family locally.

The online methods used by residents to find out what is going on in the local community were similar in both areas in the follow-up survey. Around two in three residents in both areas found out about local events and activities by talking to friends and/or family locally (61% in not delivered to areas and 67% in delivered to areas). The other common methods used were

Facebook (50% in not delivered to areas, 56% in delivered to areas); and websites of organisations and venues (40% in not delivered to areas, 46% in delivered to areas). The only difference between the areas was that residents in not delivered to areas were more likely to say they used none of the methods (9%) than those in delivered to areas (5%).

Compared to the baseline, both areas saw a significant uplift in talking to families and friends to find out about local events and activities former, an increase of 6 percentage points in not delivered to areas and a 10 percentage point increase in delivered to areas. In addition, both areas saw a significant uplift in the proportion using Facebook for this purpose, an increase of 6 percentage points in the not delivered to areas and 8 percentage points in the delivered to areas.

Table 4.3: Methods used to find out what is going on in the local community

Methods used to find out what is going on in the local community	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
By talking to friends/family locally	55%	61% (A)	57%	67% (B)
Through Facebook	44%	50% (A)	48%	56% (B)
Looking up websites of organisations and venues	44%	40%	42%	46%
Reading local newspaper/newsletter	34%	30%	39% (A)	36%
Getting email notifications from venues or organisations	28%	27%	29%	31%
By being a member of a local organisation, church, sports team etc.	18%	25% (A)	17%	20%
Check in at local shop/ community hall	16%	19%	17%	19%
Through local school (as parent or governor)	13% (B)	10%	9%	10%
Other	3% (B)	3%	2%	3%
None of these	13% (A1)	9% (B1)	12%	5%
Don’t know	*%	*%	*%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (449), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

4.2.2 Volunteering – what type and how often

The overall level of volunteering increased in both areas from the baseline to the follow-up survey, but there were no significant differences between volunteering in the delivered to and not delivered to areas. The frequency of volunteering increased in not delivered to areas, but stayed the same in delivered to areas.

The level of volunteering activity in the follow-up survey was similar for both delivered to areas (40%) and not delivered to areas (47%). In both cases there was a statistically significant increase compared to the baseline of 7 percentage points in the delivered to areas and 10 percentage points in the not delivered to areas. In delivered to areas there were increases in the proportion organising or helping to run an activity or event from 9% in the baseline survey to 13% in the follow-up survey; and in the proportion organising or helping to run hobbies or recreation/arts/social clubs, up from 8% in the baseline survey to 12% in the follow-up survey. Within the not delivered to areas, there were increases in: raising money for a charity/ taking part in sponsored events, up from 13% in the baseline survey to 17% in the follow-up survey; being a member of a committee or leading a group, up from 11% in the baseline survey to 15% in the follow-up survey; organising or helping to run an activity or event, up from 10% in the baseline survey to 14% in the follow-up survey; and organising or helping to run a local community or neighbourhood groups, up from 8% in the baseline survey to 12% in the follow-up survey.

The Community Life Survey 2023[4] reported that 16% of adults in England had taken part in formal volunteering (giving unpaid help through clubs or organisations) in the past month and 24% in informal volunteering activities (defined as unpaid help to individuals who are not a relative). This shows that the proportion of residents reporting that they take part in voluntary activities in both the delivered to and not delivered to areas are at least in line with national averages in 2023.

[4] Community Life Survey (Oct – Dec 2023). Adults 16+ in England, online and paper self-completion survey, sample 97,444.

Table 4.4: Type of volunteering done in the past month

Type of volunteering done in the past month	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Visiting people	17%	16%	15%	15%
Raising money for a charity/ taking part in sponsored events	13%	17% (A)	11%	13%
Being a member of a committee or leading a group	11%	15% (A)	9%	12%
Organising or helping to run an activity or event	10%	14% (A)	9%	13% (B)
Organising or helping to run hobbies, recreation/arts/social club	10%	11%	8%	12% (B)
Providing transport or driving people	8%	10%	8%	8%
Organising or helping to run a local community or neighbourhood groups	8%	12% (A)	7%	8%
Giving advice or information or counselling	7%	8%	5%	8%
Befriending or mentoring people	7% (B)	5%	5%	7%
Organising or helping with children's education/schools	6%	7%	4%	5%
Other	1%	3% (A)	1%	3%
None of these	63% (A1)	53%	67% (B1)	60%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Overall, the two areas are similar in terms of the frequency of volunteering. Less than one in ten volunteered at least once a day, 7% in not delivered to areas, 6% in delivered to areas. Just under half volunteered between once and 2-3 times a week, 46% in not delivered to areas, 43% in delivered to areas.

There were no changes in delivered to areas when comparing the baseline and follow-up survey. In not delivered to areas, volunteering became more frequent. There was an increase in the proportion that volunteered between once and 2-3 times a week, up from 35% to 46%. There was a corresponding fall in the proportion that volunteered about once every 6 months or less, 20% at the baseline and 12% at the follow-up.

Table 4.5: Frequency of volunteering among those who have volunteered in the past month

Frequency of volunteering among those who have volunteered in the past month	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Once/more than once a day	6%	7%	9%	6%
2-3 times per week	35%	46% (A)	42%	43%
Once a fortnight	6%	10%	14% (A)	10%
Once a month/every 2-3 months	25%	18%	20%	20%
About once every 6 months or less	20% (A1/B)	12%	8%	11%
Never	8%	7%	6%	10%
Don't know	1%	0%	1%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (331), Delivered to (296), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (210), Delivered to (157), 20/11/2023 – 17/03/2024
** denotes under 1%*

4.3 Using the internet to help with work

4.3.1 Online methods used

In both areas, the use of online methods at home to help with work remained unchanged.

Residents who were working (employed or self-employed) were asked about their use of online methods at home. In both areas, 86% said they sent emails in the past month, while 75% in each area used the internet at home to research things on websites. There were no changes from the baseline survey to the follow-up survey, in either delivered to or not delivered to areas.

Table 4.6: Online methods used to help with work in the past month

Online methods used to help with work in the past month	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Checking or sending emails	88% (B)	86%	83%	86%
Researching things by looking at websites (including 'Googling')	71%	75%	69%	75%
Making phone calls online	62%	57%	58%	61%
Having conference calls or meetings online	58%	52%	54%	55%
Connecting remotely to a network	56%	57%	55%	60%
Using social media for work purposes	39% (B)	33%	33%	30%
Other	2%	2%	1%	*%
None of these	8%	9%	11%	10%
Don't know	0%	0%	*%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (549), Delivered to (517), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (252), Delivered to (210), 20/11/2023 – 17/03/2024
** denotes under 1%*

4.4 Using the internet to help with study or learning

This section describes the types of methods used by residents when they use the internet at home to help with study or learning. It also outlines the frequency these methods are used across areas.

4.4.1 Online methods used

Residents in not delivered to areas are significantly less likely to use online methods to study or learn at home than residents in delivered to areas.

In the follow-up survey, there were differences between the areas in the use of online methods to help with researching, studying or learning. Among residents who went online at home using their broadband connection, those in delivered to areas (55%) were more likely than those in not delivered to areas (45%) to investigate topics of personal interest. There was also a difference for learning how to do something by watching a 'how to' video online (56% in delivered to areas compared to 48% in not delivered to areas). Overall, the proportion that used none of the online methods was higher in not delivered to areas (34%) than in delivered to areas (25%).

Compared to the baseline, there was an increase in the proportion of residents in delivered to areas who said that they learned how to do something by watching a 'how to' video online, from 49% in the baseline survey to 56% in the follow-up survey.

In contrast, two of the methods showed decreasing use in not delivered to areas: taking part in online training, down from 30% in the baseline survey to 24% in the follow-up survey; and helping children/others with their studies using online resources, down from 27% in the baseline survey to 20% in the follow-up survey.

Table 4.7: Online methods used in the past month to help you or someone in your household with study or learning

Online methods used in the past month to help you or someone in your household with study or learning	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Investigating topics of personal interest	49%	45%	50%	55% (A1)
Learning how to do something by watching a 'how to' video online	47%	48%	49%	56% (A1/B)
Doing own studies using online resources	33%	32%	35%	36%
Taking part in online training	30% (A1)	24%	29%	29%
Helping children/others with their studies using online resources	27% (A1)	20%	23%	23%
Studying online for a professional qualification or upskilling	17%	16%	19%	19%
Other	1%	2%	1%	1%
None of these	34%	34% (B1)	30%	25%
Don't know	*	*%	1% (A)	*%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

4.4.2 Frequency of using the internet to support study or learning

Broadly, there has been no change in the frequency of using the internet to support study or learning in either delivered to or not delivered to areas.

In the follow-up survey, the two areas were similar in the frequency of using the internet to support study or learning. Similar proportions of residents reported doing so at least once a day (35% in not delivered to areas and 38% in delivered to areas).

There was no change in frequency between the baseline and follow-up survey in delivered to areas. In not delivered to areas, residents were less likely to use the internet once a day for researching, studying, or learning, down from 24% in the baseline survey to 17% in the follow-up survey.

Table 4.8: Frequency of using the internet to support with researching, studying, or learning

Frequency of using the internet to support with researching, studying, or learning	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
More than once a day	18%	18%	17%	20%
Once a day	24% (A1)	17%	23%	18%
2-3 times per week	25%	28%	25%	29%
About once a week	18%	18%	17%	18%
About once a fortnight	3%	6%	6%	3%
About once a month	6%	4%	5%	5%
About once every 2-3 months	2%	2%	2%	1%
About once every six months	*%	1% (A)	1%	1%
Less often	1%	2%	2%	1%
Never	1%	3%	1%	2%
Don't know	1%	1%	1%	1%
NET: Once/more than once a day	42%	35%	40%	38%
NET: 2-3 times per week	43%	46%	42%	47%
NET: Once a fortnight	3%	6%	6%	3%
NET: Once/every 2-3 months	8%	6%	7%	6%
NET: Every 6 months or less	2%	3%	2%	2%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (541), Delivered to (599), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (283), Delivered to (284), 20/11/2023 – 17/03/2024
** denotes under 1%*

4.5 Using the internet to help manage day-to-day life

4.5.1 Extent to which online methods are used to manage day-to-day life

Both delivered to and not delivered to areas were unchanged in the balance of online and offline methods to manage day-to-day life.

In the follow-up survey, similar proportions of residents said they managed their day-to-day life such as banking, paying bills, and everyday shopping online (60% in not delivered to areas and 57% in delivered to areas). One fifth of residents said they managed their day-to-day life offline (20% in not delivered to areas and 19% in delivered to areas). However, residents in not delivered to areas (35%) were significantly more likely than those in delivered to areas (27%) to say they managed as much of their day-to-day life as they could online.

Looking at the net score i.e. the proportion who stated online minus the proportion who stated offline there were no changes between the baseline and follow-up surveys in either the delivered to or not delivered to areas.

Table 4.9: Extent to which online methods are used to manage day-to-day life

Extent to which online methods are used to manage day-to-day life	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
I manage as much as I can of my day-to-day life online	31%	35% (B1)	28%	27% (A1)
I manage my day-to-day life mostly online, but also do some things offline	31%	26%	30%	30%
I manage my day-to-day life equally online and offline	23%	19%	22%	25%
I manage my day-to-day life mostly offline, but do some things online	12%	16%	15%	16%
I manage my day-to-day life offline	3%	4%	4%	3%
Don't know	0%	*%	1% (A)	0%
NET: Online	62%	60%	58%	57%
NET: Offline	15%	20%	19%	19%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

4.5.2 Activities done online in the past month

There was a significant decrease in the proportion of residents who stated that they did none of the activities online in the delivered to areas.

Residents were provided with a list of activities which can be done online and were asked which they had done in the past month. In both the delivered to and not to delivered to areas the most common uses included visiting a price comparison website (57% and 43% respectively), completing a government submission form (39% and 40% respectively), and finding information online to improve your health (46% and 37% respectively).

The overall proportion that did none of the activities listed was significantly lower in delivered to areas (8%) compared to not delivered to areas (19%), and this was a significant decrease compared to the baseline survey of five percentage points.

Compared to the baseline survey there had been an uplift in a number of activities in both the delivered to and not delivered to areas, specifically: visiting a price comparison website (up 7 percentage points to 57% in the follow-up survey for delivered to areas, but no increase in not delivered to areas); ordering a prescription online (up 6 percentage points to 32% in not

delivered to areas and 9 percentage points to 37% in delivered to areas); and reading an e-book (up 11 percentage points to 32% in not delivered to areas and 6 percentage points to 29% in delivered to areas).

Table 4.10: Activities done online in the past month

Activities done online in the past month	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Visited a price comparison website	47%	43%	50%	57% (A1/B)
Completed a government submission	45%	40%	47% (B1)	39%
Found online information that helped you understand or improve your health	38%	37%	41%	46% (A1)
Paid a local council tax, fine (e.g. parking fines), rent or service	27%	23%	31%	29%
Ordered prescription online	26%	32% (A)	28%	37% (B)
Booked a medical appointment with your GP online	24%	21%	25%	24%
Played a game online	20%	22%	25% (A)	28%
Read an e-book	21%	32% (A)	23%	29% (B)
Looked online for information to help find a new job	14%	14%	15%	14%
Publicly announced a personal event on social media, e.g. birthday, or promotion	13%	13%	13%	14%
Visited betting or gambling websites, or entered sweepstakes	6%	8%	7%	7%
Looked at 'adult' sites with sexual content	3%	2%	3%	2%
None of these	16%	19% (B1)	13% (B1)	8%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378) 20/11/2023 – 17/03/2024
** denotes under 1%*

4.6 Using the internet to manage health

This section describes whether residents who go online nowadays attended any GP appointments via video-call or conference. It concludes by reporting on residents accessing

mental health services during the past month via video-call or conference, and 'outpatient' appointments with a consultant or specialist, also via video-call.

4.6.1 Attending an appointment with a GP via video or conference call

Both delivered to and not delivered to areas saw a fall in the proportion that attended a GP appointment via video-call or conference in the past month, which could be due to the baseline survey taking place during Covid-19 restrictions.

In the follow-up survey, attendance at an online appointment was similar in the two areas: the average number of appointments in the past month was 1.8 times in not delivered to areas and 1.2 in delivered to areas.

However, in both areas this was a reduction compared to the baseline. In both cases the proportion who stated that they had had an online appointment went down by 8 percentage points to 4% in the delivered to area and 6% in the not delivered to area.

Table 4.11: Attending GP appointments via video-call or conference in the past month

Attending GP appointments via video-call or conference in the past month	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Not attended a GP appointment online	85%	94% (A)	88%	96% (B)
Attended a GP appointment online	14% (A1)	6%	12% (B1)	4%
Mean number of attended GP appointments via video-call/conference	1.4	1.8	1.3	1.2

Source: Household survey of adults aged 18+
Baseline: Not delivered to (827), Delivered to (836), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (419), Delivered to (376), 20/11/2023 – 17/03/2024
** denotes under 1%*

Attending an appointment with mental health services via video-call or conference

In both areas, there was a decrease in the proportion that attended an appointment with mental health services via video-call or conference.

As was the case with GP appointments online, accessing mental health services via video call or conference in the last month had gone down significantly since the baseline survey. In delivered to areas there was a decrease of 5 percentage points to 1%, and in the not delivered to area a decrease of 7 percentage points to 1%.

Among those who had used this service via video call or conference, they had done so on average 2.9 times in not delivered to areas and 2.0 in delivered to areas in the follow-up survey.

Table 4.12: Attending an appointment with mental health services via video-call or conference in the past month

Attending mental health appointments via video-call or conference in the past month	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Not attended a mental health appointment online	92%	98% (A)	94%	99% (B)
Attended a mental health appointment online	8% (A1)	1%	6% (B1)	1%
Mean number of attended mental health appointments via video call or conference in the past month	1.4	2.9	1.3	2.0

Source: Household survey of adults aged 18+
Baseline: Not delivered to (824), Delivered to (838), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (418), Delivered to (376), 20/11/2023 – 17/03/2024
** denotes under 1%*

4.6.2 Attending 'outpatient' appointments via video-call

Attendance at 'outpatient' appointments via video-call remains static between the baseline and the follow-up survey in both delivered to and not delivered to areas.

In the follow-up survey, similar proportions of residents said they had attended an 'outpatient' appointment with a consultant or specialist via video-call (6% in not delivered to areas and 7% in delivered to areas). Among those who had attended an appointment, the average number of appointments in the past month was 1.9 in not delivered to areas and 1.4 in delivered to areas.

There were no changes between the two surveys in either area.

Table 4.13: Attending an 'outpatient' appointment via video call in the past month

Attending an 'outpatient' appointments via video call in the past month	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Not attended an outpatient appointment	92%	94%	92%	93%
Attended an outpatient appointment	8%	6%	8%	7%
Mean number of attended 'outpatient' appointments via video call in the past month	1.2	1.9	1.2	1.4

Source: Household survey of adults aged 18+
Baseline: Not delivered to (829), Delivered to (840), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (418), Delivered to (376), 20/11/2023 – 17/03/2024
** denotes under 1%*

5 Broadband connection

This chapter focuses on how residents who go online using their home internet connection rate their connection now and in the previous 12 months and how their service compares to what they perceive to be available in their local area. Residents in not delivered to and delivered to areas were asked to estimate their current broadband speed and compare this to the previous 12 months. This chapter also provides data on the download speeds recorded by residents who completed the broadband speed check.

5.1 Rating an existing broadband connection

5.1.1 Rating the speed of the home internet connection

Both areas saw improved ratings for the speed of residents' home internet connection, although those in the delivered to area were significantly more positive.

In the follow-up survey, residents in delivered to areas gave more positive ratings than those in not delivered to areas for the speed of their home internet connection. In delivered to areas, 41% rated the speed of their home internet connection as very good, compared to only 22% in not delivered to areas. The proportion that rated it as fairly good was also higher in delivered to areas (34%) than not delivered to areas (26%). Conversely, very poor ratings were more prevalent in not delivered to areas (31%) than delivered to areas (11%).

Both areas saw an uplift in the proportion stating that the speed of the internet connectivity was 'very good', although this was significantly more so in the delivered to areas. There was an increase of 34 percentage points to 41% in the follow-up survey compared to an increase of 14 percentage points to 22% at the follow-up in the not delivered to areas.

Table 5.1: Rating the speed of the home internet connection

Rating the speed of the home internet connection	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Very good	8%	22% (A)	7%	41% (A1/B)
Fairly good	21%	26%	25%	34% (A1/B)
Fairly poor	24% (A1)	18%	23% (B1)	14%
Very poor	46% (A1)	31% (B1)	43% (B1)	11%
Don't know	1%	2% (A/B1)	1%	*%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

When the analysis was restricted to only cover those households which participated in the research in both survey waves, a similar pattern is observed. There is an increase in the proportion of households reporting that the speed of their internet connection is good – but the increase is larger in the delivered to areas than in not delivered to areas.

Table 5.2: Rating the speed of the home internet connection (Sample restricted to those that completed Wave 1 and Wave 2 research)

Rating the speed of the home internet connection	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Very good	7%	22% (A)	8%	41% (A1/B)
Fairly good	21%	27%	28%	34% (A1/B)
Fairly poor	25% (A1)	19%	25% (B1)	14%
Very poor	47% (A1)	31% (B1)	39% (B1)	11%
Don't know	0%	2% (A/B1)	0%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (390), Delivered to (373), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (390), Delivered to (373), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.1.2 Rating the importance of the speed of the home internet connection

In both areas, there was a fall in the share of residents who considered the speed of their home internet connection to be essential, but most considered it to be very important.

In the follow-up survey, ratings of the importance of the speed of the home internet connection were similar in the two areas. Around one in three residents considered the speed of their home internet connection to be essential (34% in not delivered to areas and 31% in delivered to areas), although in both cases this was a significant fall compared to the baseline survey (42% and 44% respectively) which could have been driven by changes in Covid-19 restrictions between the baseline and follow-up surveys.

Most considered speed to be 'very important' (46% in delivered to areas and 47% in not delivered to areas).

Table 5.3: Rating the importance of the speed of the home internet connection

Rating the importance of the speed of the home internet connection	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Essential	44% (A1)	34%	42% (B1)	31%
Very important	38%	47% (A)	38%	46% (B)
Fairly important	16%	16%	15%	20%
Not very important	2%	3%	3%	4%
Not at all important	*%	*%	*%	0%
Don't know	*%	1%	1%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.1.3 Rating the speed of the home internet connection over the past 12 months

Delivered to areas showed a sharp rise in the proportion that reported an improvement in the speed of the home internet connection.

When asked to compare the speed of their home internet connection compared to 12 months ago, the majority of residents in the not delivered to areas stated that there had been no change (52% compared to 37% in delivered to areas). Whilst those who had stated that the speed was 'a lot better' had gone up in both delivered to and not delivered to areas, the improvement was significantly larger in the delivered to areas, with an increase of 31 percentage points to 37% in the follow-up survey. By comparison, there was a 13 percentage point increase to 19% in the follow-up survey for not delivered to areas.

It is also the case that the proportion stating that their internet speed was a little better had also gone up significantly in the delivered to areas from 8% in the baseline survey to 16% in the follow-up survey, which is significantly higher than not delivered to areas in the follow-up survey (9%).

Table 5.4: Comparing the speed of the home internet connection over the past 12 months

Comparing the speed of the home internet connection over the past 12 months	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
A lot better	6%	19% (A)	6%	37% (A1/B)
A little better	7%	9%	8%	16% (A1/B)
No change	54%	52% (B1)	59% (B1)	37%
A little worse	13%	10% (B1)	13% (B1)	6%
A lot worse	16% (A1/B)	7%	11% (B1)	4%
Don't know	1%	1%	1%	1%
Not applicable/have not lived here 12 months	3% (A1)	*%	2% (B1)	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (420), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

When the analysis was restricted to only cover those households which participated in the research in both survey waves, a similar pattern is observed. There is an increase in the proportion of households reporting that the broadband connection has improved – but the increase is larger in the delivered to areas than in not delivered to areas.

Table 5.5: Comparing the speed of the home internet connection over the past 12 months (Sample restricted to those that completed Wave 1 and Wave 2 research)

Comparing the speed of the home internet connection over the past 12 months	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
A lot better	5%	20% (A)	8%	38% (A1/B)
A little better	9%	10%	8%	16% (A1/B)
No change	57%	53% (B1)	60% (B1)	37%
A little worse	13%	10% (B1)	15% (B1)	5%
A lot worse	14% (A1/B)	6%	8% (B1)	4%
Don't know	1%	1%	1%	1%
Not applicable/have not lived here 12 months	2% (A1)	0%	1% (B1)	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (390), Delivered to (373), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (390), Delivered to (373), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.1.4 Rating the reliability of the home internet connection

Both areas saw improved ratings for the reliability of residents' home internet connection, but the improvement in perception was significantly higher in the delivered to area.

In the follow-up survey, residents in delivered to areas gave more positive ratings than those in not delivered to areas for the reliability of their home internet connection. In delivered to areas, 43% rated the reliability of their home internet connection as very good, an increase of 33 percentage points compared to the baseline survey. In the not delivered to areas, 26% rated their connection as very good which is a 16 percentage point increase from the baseline survey.

In not delivered to areas, around a fifth (22%) stated that the reliability of their home internet connection was 'very poor' which is significantly higher than in delivered to areas (8%).

Table 5.6: Rating the reliability of the home internet connection

Rating the reliability of the home internet connection	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Very good	10%	26% (A)	10%	43% (A1/B)
Fairly good	28%	34%	31%	35%
Fairly poor	26% (A1)	18%	25% (B1)	13%
Very poor	35% (A1)	22% (B1)	33% (B1)	8%
Don't know	*%	*%	1% (A)	*%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

When the analysis was restricted to only cover those households which participated in the research in both survey waves, a similar pattern is observed. There is an increase in the proportion of households reporting that the reliability of their broadband connection has improved – but the increase is larger in the delivered to areas than in not delivered to areas.

Table 5.7: Rating the reliability of the home internet connection (Sample restricted to those that completed Wave 1 and Wave 2 research)

Rating the reliability of the home internet connection	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Very good	9%	25% (A)	11%	43% (A1/B)
Fairly good	30%	34%	37%	35%
Fairly poor	27% (A1)	21%	25% (B1)	13%
Very poor	34% (A1)	20% (B1)	26% (B1)	8%
Don't know	0%	0%	1% (A)	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (390), Delivered to (373), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (390), Delivered to (373), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.1.5 Rating the importance of the reliability of the home internet connection

In both areas, there was a fall in the proportion of residents who considered the reliability of their home internet connection to be essential.

As was the case with the speed of their internet connection, there was a fall in the proportion of residents stating that reliability was essential (45% in not delivered to areas and 43% in delivered to areas). A greater proportion considered it to be 'very important', with an increase from 33% in the baseline survey to 45% in the follow-up survey in delivered to areas, and an increase from 34% in the baseline survey to 40% in the follow-up survey in not delivered to areas.

Table 5.8: Rating the importance of the reliability of the home internet connection

Rating the importance of the reliability of the home internet connection	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Essential	53% (A1)	45%	53% (B1)	43%
Very important	34%	40% (A)	33%	45% (B)
Fairly important	12%	12%	11%	11%
Not very important	1%	2%e	2%	*%
Not at all important	*%	1%	*%	0%
Don't know	0%	*%	*%	*%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.1.6 Rating the reliability of home internet connection over the past 12 months

Delivered to areas showed a substantial rise in the proportion of residents that reported an improvement in the reliability of the home internet connection.

When considering the reliability of their home internet connection over the past 12 months, 32% of residents in delivered to areas felt it had got a lot better in the follow-up survey. This is higher than the proportion in not delivered to areas (17%) and a significantly larger increase from the baseline survey (27 percentage point increase) compared to the not delivered to area (11 percentage point increase).

The proportion that said it was a little better in the follow-up survey was also higher in delivered to areas (16%) than not delivered to areas (11%). Residents in not delivered to areas were more likely to report that the reliability of their home internet connection had not changed over the past 12 months (52%) than those in delivered to areas (40%).

Table 5.9: Comparing the reliability of the home internet connection over the past 12 months

Comparing the reliability of the home internet connection over the past 12 months	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
A lot better	6%	17% (A)	5%	32% (A1/B)
A little better	7%	11% (A)	7%	16% (A1/B)
No change	56%	52% (B1)	59% (B1)	40%
A little worse	14%	11%	14% (B1)	7%
A lot worse	15% (A1/B)	8% (B1)	11% (B1)	3%
Don't know	1%	1%	1%	1%
Not applicable/have not lived here 12 months	3% (A1)	0%	2% (B1)	*%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

When the analysis was restricted to only cover those households which participated in the research in both survey waves, a similar pattern is observed. There is an increase in the proportion of households reporting that the reliability of their broadband connection has improved – but the increase is larger in the delivered to areas than in not delivered to areas.

Table 5.10: Comparing the reliability of the home internet connection over the past 12 months (Sample restricted to those that completed Wave 1 and Wave 2 research)

Comparing the reliability of the home internet connection over the past 12 months	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
A lot better	5%	18% (A)	8%	32% (A1/B)
A little better	7%	11% (A)	6%	15% (A1/B)
No change	59%	52% (B1)	60% (B1)	41%
A little worse	15%	11%	15% (B1)	7%
A lot worse	13% (A1/B)	7% (B1)	9% (B1)	3%
Don't know	1%	1%	1%	1%
Not applicable/have not lived here 12 months	2% (A1)	0%	2% (B1)	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (390), Delivered to (373), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (390), Delivered to (373), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.1.7 Rating the value for money of the home internet connection

Both areas saw improved ratings for the value for money of residents' home internet connection, but the uplift was far greater in the delivered to areas.

In the follow-up survey, residents in delivered to areas gave more positive ratings than those in not delivered to areas for the value for money of their home internet connection. In delivered to areas, 23% rated the value for money of their home internet connection as 'very good', higher than in not delivered to areas (16%). The proportion of 'fairly good' ratings was also higher in delivered to areas (47%) than in not delivered to areas (32%). Conversely, very poor ratings were more prevalent in not delivered to areas (28%) than delivered to areas (10%).

Whilst both areas saw a significant uplift in the proportion of residents stating that the value for money was 'very good', it was substantially higher in the delivered to areas. There was an increase of 17 percentage points in delivered to areas compared to 9 percentage points in not delivered to areas. It was also the case that the proportion of residents stating that value for money was fairly good had increased from 30% in the baseline survey to 47% in the follow-up survey in delivered to areas, but had not seen a statistically significant increase in not delivered to areas (from 27% in the baseline survey to 32% in the follow-up survey).

Table 5.11: Rating the value for money of the home internet connection

Rating the value for money of the home internet connection	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Very good	7%	16% (A)	6%	23% (A1/B)
Fairly good	27%	32%	30%	47% (A1/B)
Fairly poor	28% (A1)	22%	26% (B1)	17%
Very poor	36% (A1)	28% (B1)	35% (B1)	10%
Don't know	1%	3%	3% (A)	4%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.1.8 Rating the importance of the value for money of the home internet connection

In both areas, there was a fall in the proportion of residents who considered the value for money of their home internet connection to be essential.

In the follow-up survey, the two areas saw similar ratings for the importance of value for money of their home internet connection. Around one in four residents considered this aspect to be 'essential' (25% in not delivered to areas and 22% in delivered to areas).

Compared to the baseline, in both delivered to and not delivered to areas residents were less likely to consider the value for money of their home internet connection to be 'essential', but there was a rise in the proportion of residents in the not delivered to areas who stated that it was 'very important', from 38% in the baseline survey to 44% in the follow-up survey.

Table 5.12: Rating the importance of the value for money of the home internet connection

Rating the importance of the value for money of the home internet connection	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Essential	30% (A1)	25%	29% (B1)	22%
Very important	38%	44% (A)	39%	45%
Fairly important	25%	26%	23%	28%
Not very important	6%	4%	5%	3%
Not at all important	*%	1%	1%	0%
Don't know	1%	1%	2% (A)	2%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.1.9 Rating the value for money of the home internet connection over the past 12 months

Significantly more residents in both delivered to and not delivered to areas showed a rise in reported improvement of value for money for the home internet connection.

When considering the value for money of their home internet connection over the past 12 months, 18% of residents in delivered to areas felt it had got a lot better in the follow-up survey. This was higher than the proportion in not delivered to areas in the follow-up survey (12%). The proportion that said it was a little better was also higher in delivered to areas (19%) than not delivered to areas (10%). Residents in not delivered to areas were more likely to report that the value for money of their home internet connection had not changed over the past 12 months (54%) than those in delivered to areas (45%).

Once again, both areas had seen a significant uplift in the proportion of residents who felt value for money had got 'a lot better' or a little better' but it was in the delivered to areas where this improvement was the greatest.

Table 5.13: Comparing the value for money of the home internet connection over the past 12 months

Comparing the value for money of the home internet connection over the past 12 months	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
A lot better	4%	12% (A)	2%	18% (A1/B)
A little better	6%	10% (A)	7%	19% (A1/B)
No change	60% (A1)	54% (B1)	63% (B1)	45%
A little worse	13%	16%	12%	11%
A lot worse	14% (A1/B)	8%	10% (B1)	6%
Don't know	1%	1%	3% (A)	1%
Not applicable/have not lived here 12 months	3% (A1)	0%	3% (B1)	*%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

When the analysis was restricted to only cover those households which participated in the research in both survey waves, a similar pattern is observed. There is an increase in the proportion of households reporting that the value for money of their broadband connection has improved – but the increase is larger in the delivered to areas than in not delivered to areas.

Table 5.14: Comparing the value for money of the home internet connection over the past 12 months (Sample restricted to those that completed Wave 1 and Wave 2 research)

Comparing the reliability of the home internet connection over the past 12 months	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
A lot better	5%	18% (A)	8%	32% (A1/B)
A little better	7%	11% (A)	6%	15% (A1/B)
No change	59%	52% (B1)	60% (B1)	41%
A little worse	15%	11%	15% (B1)	7%
A lot worse	13% (A1/B)	7% (B1)	9% (B1)	3%
Don't know	1%	1%	1%	1%
Not applicable/have not lived here 12 months	2% (A1)	0%	2% (B1)	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (390), Delivered to (373), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (390), Delivered to (373), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.2 Rating an existing broadband connection: Overall

Both areas saw improved overall ratings for the home internet connection, but the improvement was significantly greater in the delivered to area.

Finally, residents were asked to rate their existing broadband at an overall level. Whilst both areas saw a positive improvement in perceptions, it was residents in the delivered to areas who were most positive. In the follow-up survey, 42% of residents in delivered to areas stated that it was very good, an increase of 35 percentage points compared to the baseline survey. In not delivered to areas, 22% of residents stated it was very good, an increase of 14 percentage points from the baseline survey.

The proportion that rated it as 'fairly good' was also higher in delivered to areas (35%) than not delivered to areas (28%), and once again in delivered to areas this was a significant uplift compared to the baseline (27%).

One quarter of residents (25%) in the not delivered to area gave an overall rating of 'very poor' compared to 10% in the delivered to areas in the follow-up survey. The proportion rating the connection as very poor in the follow-up survey in delivered to areas is significantly different compared to the baseline survey (37%), and from the proportions in the not delivered to areas in the baseline and follow-up surveys (40% and 25% respectively). This suggests that although

there has been a decrease in the proportion reporting their connection as very poor in not delivered to areas, the decrease has been much larger in delivered to areas.

Table 5.15: Overall rating of existing home internet connection

Overall rating of existing home internet connection	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Very good	8%	22% (A)	7%	42% (A1/B)
Fairly good	25%	28%	27%	35% (A1/B)
Fairly poor	27%	23% (B1)	28% (B1)	13%
Very poor	40% (A1)	25% (B1)	37% (B1)	10%
Don't know	*%	1% (A)	1%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

When the analysis was restricted to only cover those households which participated in the research in both survey waves, a similar pattern is observed. There is an increase in the proportion of households reporting that their overall rating of their broadband connection has improved, with a larger proportion of households rating the connections as very or fairly good in the follow-up survey being larger than at baseline – but the increase is larger in the delivered to areas than in not delivered to areas.

Table 5.16: Overall rating of existing home internet connection (Sample restricted to those that completed Wave 1 and Wave 2 research)

Overall rating of existing home internet connection	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Very good	7%	23% (A)	8%	42% (A1/B)
Fairly good	25%	27%	30%	34% (A1/B)
Fairly poor	30%	24% (B1)	29% (B1)	13%
Very poor	38% (A1)	25% (B1)	32% (B1)	10%
Don't know	0%	1% (A)	0%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (390), Delivered to (373), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (390), Delivered to (373), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.3 Broadband speed

The household surveys included questions about the speed of the home internet connection, collected an estimate of the current internet speed, the internet speed at the address 12 months ago and asked for comparisons with what may be available in the local area. Residents also completed a speed check to record an exact download speed for their address, either in advance or during the interview.

This section of this chapter summarises these results.

5.3.1 Estimates of current speed of home internet connection

Residents in both areas saw rises in the estimated speed of the home internet connection, but this was more marked in the delivered to areas.

In the follow-up survey, around a fifth of residents in both delivered to and not delivered to areas did not know the current speed of their internet connection (18% in not delivered to areas and 20% in delivered to areas).

Among residents who were able to provide an estimate of their current internet connection, internet speeds were typically higher in delivered to than not delivered to areas in the follow-up survey. In delivered to areas, 12% estimated the speed to be 330 Mbps or above but below 1 Gbps, higher than in not delivered to areas (5%). In addition, 35% in delivered to areas estimated a speed of 80 Mbps or above but below 330 Mbps, compared to 16% in not delivered to areas. Residents in not delivered to areas were more likely to estimate slower speeds: 38% gave a speed of and 10 Mbps or less compared to 18% in delivered to areas;

and 23% gave a speed of above 10 Mbps but below 24 Mbps compared to 15% in delivered to areas.

There was a clear change in estimated speed in delivered to areas. At the baseline, most residents reported having a sub-superfast (below 24Mbps) connection speed (82% in not delivered to areas and 88% in delivered to areas). In the follow-up survey, this had fallen to 61% in not delivered to areas and 33% in delivered to areas, and the most common reported speeds in the follow-up survey in the delivered to areas was 80Mbps to 330Mbps. In not delivered to areas, the most commonly reported speed was still 10Mbps or less in the follow-up survey.

In the baseline survey in delivered to areas, 2% estimated the speed to be 330 Mbps or above but below 1 Gbps, and this went up to 12% in the follow-up survey. There was also an increase in the proportion that estimated a speed of 80 Mbps or above but below 330 Mbps, from 3% in the baseline survey to 35% in the follow-up survey; and a speed of 24 Mbps or above but below 80 Mbps, from 6% in the baseline survey to 19% in the follow-up survey. Correspondingly, there were falls in the proportions estimating a speed of 10 Mbps or less, down from 62% in the baseline survey to 18% in the follow-up survey; and a speed of above 10 Mbps but below 24 Mbps, down from 26% in the baseline survey to 15% in the follow-up survey.

Estimated speeds also increased in not delivered to areas, but not to the same extent as the delivered to area. In the baseline survey, 1% estimated the speed to be 330 Mbps or above but below 1 Gbps, and this was higher (5%) in the follow-up survey. There was also an increase in the proportion that estimated a speed of 80 Mbps or above but below 330 Mbps, from 3% in the baseline survey to 16% in the follow-up survey. There was a fall in the proportion estimating a speed of 10 Mbps or less, down from 55% in the baseline survey to 38% in the follow-up survey. Against the overall trend, the proportion that estimated a speed of 1 Gbps or above decreased, from 2% in the baseline survey to zero at the follow-up survey.

Table 5.17: Current speed of connection of residents providing an estimate

Current speed of connection of residents providing an estimate	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
10 Mbps or less	55% (A1)	38% (B1)	62% (B1)	18%
Above 10 Mbps but below 24 Mbps	27%	23% (B1)	26% (B1)	15%
24 Mbps or above but below 80 Mbps	11% (B)	17%	6%	19% (B)
80 Mbps or above but below 330 Mbps	3%	16% (A)	3%	35% (A1/B)
330 Mbps or above but below 1 Gbps	1%	5% (A)	2%	12% (A1/B)
1 Gbps or above	2% (A1)	0%	1%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (661), Delivered to (652), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (347), Delivered to (303), 20/11/2023 – 17/03/2024
** denotes under 1%*

When the sample was restricted to just those households which had completed the survey in the baseline and follow-up stages, a similar pattern was observed. There was a large decrease in the proportion of households which had slower connection speeds in the delivered to areas, which was not observed in not delivered to areas. Conversely, there was a large increase in the proportion of households reporting they had internet connections in the higher speed bands in delivered to areas, which again was not observed in the not delivered to areas.

Table 5.18: Current speed of connection of residents providing an estimate (Sample restricted to those that completed Wave 1 and Wave 2 research)

Current speed of connection of residents providing an estimate	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
10 Mbps or less	59% (A1)	40% (B1)	58% (B1)	18%
Above 10 Mbps but below 24 Mbps	29%	24% (B1)	28% (B1)	15%
24 Mbps or above but below 80 Mbps	8% (B)	14%	6%	18% (B)
80 Mbps or above but below 330 Mbps	3%	18% (A)	4%	35% (A1/B)
330 Mbps or above but below 1 Gbps	1%	5% (A)	3%	13% (A1/B)
1 Gbps or above	0% (A1)	0%	1%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (293), Delivered to (254), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (293), Delivered to (254), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.4 Actual speed of connection

In both types of area, actual internet speeds increased between the two survey waves, but to a much greater extent in the delivered to areas.

The mean download speed recorded by respondents who completed the speed check during the baseline survey, either in advance or during the interview, was similar in both areas – 20.25 Mbps in not delivered to areas and 20.02 Mbps in delivered to areas.

In the follow-up survey, recorded internet speeds were typically higher in delivered to than not delivered to areas. In delivered to areas, 9% recorded a download speed of 330 Mbps or above, higher than in not delivered to areas (5%). In addition, 38% of those in delivered to areas recorded a speed of 80 Mbps or above but below 330 Mbps compared to 18% in not delivered to areas. Residents in not delivered to areas were more likely to record slower speeds: 24% gave a speed of 10 Mbps or less, compared to 14% in delivered to areas; and 31% gave a speed of above 10 Mbps but below 24 Mbps, compared to 17% in delivered to areas.

There was a clear change in recorded download speed in delivered to areas. In the baseline survey, 1% recorded a speed of 330 Mbps or above, increasing to 9% at the follow-up survey. There was also an increase in the proportion that recorded a speed of 80 Mbps or above but below 330 Mbps, from 3% in the baseline survey to 38% in the follow-up survey; and a speed of 24 Mbps or above but below 80 Mbps, from 8% in the baseline survey to 22% in the follow-up survey. Correspondingly, there were falls in the proportions recording a speed of 10 Mbps

or less, down from 57% in the baseline survey to 14% in the follow-up survey; and a speed of above 10 Mbps but below 24 Mbps, down from 32% in the baseline survey to 17% in the follow-up survey.

Recorded download speeds also increased in not delivered to areas, but not to the same extent. In the baseline survey, 1% recorded a speed of 330 Mbps or above, going up to 5% in the follow-up survey. There was also an increase in the proportion that recorded a speed of 80 Mbps or above but below 330 Mbps, from 2% in the baseline survey to 18% in the follow-up survey; and a speed of 24 Mbps or above but below 80 Mbps, from 12% in the baseline survey to 22% in the follow-up survey. There was a fall in the proportion recording a speed of 10 Mbps or less, down from 53% in the baseline survey to 24% in the follow-up survey.

There was also a clear increase in the mean download speed recorded by respondents who completed the speed check during the follow-up survey. In the follow-up survey, the mean download speed was higher in both areas, but had increased more in the areas in which the Superfast Broadband Programme had provided subsidised coverage – to 63.24 Mbps in the not delivered to areas and to 116.92 in the delivered to areas.

Table 5.19: Current speed of connection of those that completed the speed check

Current speed of connection of those that completed the speed check	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
10 Mbps or less	53% (A1)	24% (B1)	57% (B1)	14%
Above 10 Mbps but below 24 Mbps	32%	31% (B1)	32% (B1)	17%
24 Mbps or above but below 80 Mbps	12% (B)	22% (A)	8%	22% (B)
80 Mbps or above but below 330 Mbps	2%	18% (A)	3%	38% (A1/B)
330 Mbps or above	1%	5% (A)	1%	9% (A1/B)
Mean speed	20.25 (A1)	63.24 (A/B1)	20.02	116.92 (A1/B)

Source: Household survey of adults aged 18+
Baseline: Not delivered to (765), Delivered to (707), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (410), Delivered to (361), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.4.1 Speed of connection 12 months ago

In delivered to areas, estimates of internet speed 12 months ago increased between the two waves of the survey.

Respondents were asked to estimate internet speeds at their home 12 months prior to the follow-up survey.

Among residents who were able to provide an estimate, 6% of residents in delivered to areas estimated that the speed of their internet connection 12 months ago was 330 Mbps or above but below 1 Gbps, which was higher than in not delivered to areas (2%). The proportion that estimated the speed at 80 Mbps or above but below 330 Mbps was also higher in delivered to areas (11%) than in not delivered to areas (5%).

Estimated speeds increased in delivered to areas. At the baseline, less than 1% estimated their internet speed 12 months ago to be 330 Mbps or above but below 1 Gbps; this increased to 6% at the follow-up. There was also an increase in the proportion that estimated a speed 12 months ago of 80 Mbps or above but below 330 Mbps (from 1% in the baseline survey to 11% in the follow-up survey); and a speed of 24 Mbps or above but below 80 Mbps (from 5% in the baseline survey to 11% in the follow-up survey). Correspondingly, there was a fall in the proportion estimating a speed of 10 Mbps or less, down from 68% in the baseline survey to 47% in the follow-up survey.

Estimated speeds also increased in not delivered to areas but not to the same extent. At the baseline, 2% estimated their internet speed 12 months ago to be 80 Mbps or above but below 330 Mbps, and this increase to 5% in the follow-up survey. There was also an increase in the proportion that estimated a speed of 24 Mbps or above but below 80 Mbps, from 8% in the baseline survey to 13% in the follow-up survey.

Table 5.20: Speed of connection 12 months ago

Speed of connection 12 months ago	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
10 Mbps or less	61%	51%	68% (B1)	47%
Above 10 Mbps but below 24 Mbps	27%	29%	25%	24%
24 Mbps or above but below 80 Mbps	8% (B)	13% (A)	5%	11% (B)
80 Mbps or above but below 330 Mbps	2%	5% (A)	1%	11% (A1/B)
330 Mbps or above but below 1 Gbps	1%	2%	*%	6% (A1/B)
1 Gbps or above	1%	0%	1%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (615), Delivered to (604), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (337), Delivered to (288), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.4.2 Comparison to the speeds available in the local area

In delivered to areas, there was an upward shift in the view that there were faster speeds available locally, despite not having this connection speed in their household. In not delivered to areas, there was an increase in residents saying they had the fastest connection available.

In the follow-up survey, around half of residents said they had the fastest connection available in their local area (53% in not delivered to areas and 47% in delivered to areas). Residents in delivered to areas were more likely to say there were faster speeds available locally but they did not have this connection speed in their household (40%) than in not delivered to areas (30%).

There were significant shifts in perception between the baseline and the follow-up surveys: residents in delivered to areas were more likely to say there were faster speeds available locally but they did not have this connection speed in their household, up from 32% in the baseline survey to 40% in the follow-up survey. Those in not delivered to areas were more likely to say this time around that they had the fastest connection available in the local area, from 43% at the baseline to 53% in the follow-up survey.

Table 5.21: Comparison to the local area

Comparison to the local area	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
I/we have the fastest connection available in our local area	43%	53% (A)	43%	47%
I/we know there are faster speeds available in our local area but I/we don't have this in our household	33%	30%	32%	40% (A1/B)
Don't know	23% (A1)	17%	25% (B1)	13%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

5.5 Cost of accessing the internet

In both types of area, the average expenditure for accessing the internet has increased between the baseline and follow-up surveys, with the increase being larger in delivered to areas.

Over four in five residents provided a figure for how much their household spends each month on accessing the internet.

In the baseline survey, on average residents in not delivered to areas spent £67.78 each month, which was significantly higher than the average of £56.80 for residents in delivered to areas. In the follow-up survey, the mean monthly expenditure on accessing the internet had increased in both delivered to and non-delivered to areas, up to £72.61 in not delivered to areas and £67.31 in delivered to areas. This indicates that the increase in expenditure on accessing the internet has been larger in delivered to areas than in not delivered to areas, however the overall level of expenditure for residents in delivered to areas remains below the expenditure for residents in not delivered to areas.

Table 5.22: Monthly cost of accessing the internet

Monthly cost of accessing the internet	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Mean	£67.78	£72.61 (A/B)	£56.80 (A/B1)	£67.31 (B/A1)
Standard deviation	£49.64	£49.46	£43.36	£41.79
Median	£50	£55	£40	£55
Mode	£30	£35	£30	£50

Source: Household survey of adults aged 18+
Baseline: Not delivered to (740), Delivered to (703), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (346), Delivered to (309), 20/11/2023 – 17/03/2024

When the sample was restricted to just those households which had completed the survey in the baseline and follow-up stages, a similar pattern was observed. There was an increase in the cost of accessing the internet in both areas, but the larger increase was observed in the delivered to areas – albeit from a lower base.

Table 5.23: Monthly cost of accessing the internet (Sample restricted to those that completed Wave 1 and Wave 2 research)

Monthly cost of accessing the internet	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Mean	£68.37	£75.11 (A/B1)	£58.82 (A/B1)	£67.75 (A1/B)
Standard Deviation	£49.50	£49.76	£44.62	£42.20
Median	£50	£60	£42	£55
Mode	£30	£35	£30	£50

Source: Household survey of adults aged 18+
Baseline: Not delivered to (321), Delivered to (273), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (321), Delivered to (273), 20/11/2023 – 17/03/2024

6 Upgrading

This chapter covers upgrading a home internet connection, including whether or not residents in not delivered to and delivered to areas had upgraded their internet, how they found out about the opportunities to upgrade, the reasons why they chose to upgrade and why they decided not to do so. It includes a summary of the responses from residents in each area to a set of statements designed to measure the perceived impact of upgrading.

6.1 Residents who had upgraded

Both the delivered to and not delivered to areas showed an increase in the share of residents who had upgraded their internet connection to one that was faster or better, although the proportion is significantly higher in delivered to areas.

In the follow-up survey, more than two-thirds of residents (69%) in delivered to areas had upgraded their internet connection to one that was faster or better; this figure was significantly higher than in not delivered to areas (51%).

Compared to the baseline survey, there was a sharp increase in the delivered to areas in the proportion of residents saying they had upgraded their internet connection to one that was faster or better, from 26% at the baseline to 69% at the follow-up survey (an increase of 43 percentage points). There was also a significant, if slightly less pronounced, increase in not delivered to areas: the proportion of residents that said they had upgraded their internet connection to one that was faster or better increased from 35% at the baseline to 51% at the follow-up survey (an increase of 16 percentage points).

Table 6.1: Internet connection upgraded at the address

Internet connection upgraded at the address	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Yes - we have upgraded our internet connection to one that is faster or better	35% (B)	51% (A)	26%	69% (A1/B)
No - we have not upgraded our internet connection to one that is faster or better	60% (A1)	48% (B1)	66% (A/B1)	29%
Don't know	5% (A1)	1%	8% (A/B1)	2%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

There was no clear pattern in terms of when residents last upgraded their internet connection, although the changes have all happened in the last two years. Residents who had upgraded their internet connection while living at their current address were asked when it was last upgraded. For residents in delivered to areas, they were more likely to have upgraded between

seven and 12 months previously (44%) than those in not delivered to areas (31%). Residents in not delivered to areas were more likely to say they last upgraded more than 18 months ago (27%) than those in delivered to areas (15%).

Table 6.2: When the internet connection was last upgraded

When the internet connection was last upgraded	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Less than a month ago	5%	3%	5%	2%
Between one month and three months ago	6%	5%	16% (A/B1)	8%
Between four months and six months ago	13%	13%	11%	14%
Between seven months and 12 months (a year) ago	22%	31% (A)	21%	44% (A1/B)
Between 13 months and 18 months (a year and a half) ago	20%	20%	16%	16%
Longer ago	34%	27% (B1)	30% (B1)	15%
Don't know	1%	1%	0%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
** denotes under 1%*

6.1.2 Reasons for upgrading

The speed of internet connection was the most common reason for upgrading. Motivations were similar between delivered to and not delivered to areas.

At the follow-up survey, the speed of internet connection was the most common reason (chosen from a pre-defined list) for upgrading, which was selected by 68% in not delivered to areas and 73% in delivered to areas. This was followed by previous connections being unreliable, selected by 14% in delivered to areas and 17% in not delivered to areas. There were no significant differences in motivations between the two areas or between the two waves of research.

Table 6.3: Reasons for upgrading

Reasons for upgrading (prompted list)	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Our previous connection was too slow	73%	68%	65%	73%
Our previous connection was too unreliable	15%	17%	20%	14%
Our previous connection was poor value for money	6%	5%	6%	5%
Was advertised by an internet service provider	2%	2%	3%	4%
Was advertised by the Local Authority	*%	0%	0%	0%
Other	2%	7% (A)	5%	4%
Don't know	2%	0%	1%	*%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
** denotes under 1%*

6.1.3 Sources of information about upgrading

In delivered to areas, there was a rise in the proportion that heard about opportunities to upgrade from their internet provider.

More than half of residents who had upgraded their internet connection had heard about opportunities to upgrade from their internet provider. In the follow-up survey, the proportion giving this answer was higher in delivered to areas (73%) than in not delivered to areas (56%) and was a significant increase compared to the delivered to areas at the baseline (53%). Residents in not delivered to areas were more likely to say they used none of the listed sources (12%), than those in delivered to areas (3%).

Table 6.4: Sources of information about upgrading

Sources of information about upgrading	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
From an internet/broadband supplier	55%	56%	53%	73% (A1/B)
From family/friends	20%	24%	23%	18%
From the local council	2%	0%	2%	2%
From landlord	1%	2%	*%	*%
From somewhere else	14%	16%	17%	16%
None of these	17%	12% (B1)	11% (B1)	3%
Don't know	1%	2%	2%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
** denotes under 1%*

6.2 Impacts of upgrading among residents who have upgraded

The survey asked about a range of potential impacts that upgrading may have had on different aspects of residents' lives. These questions were asked to residents who had upgraded their home internet connection in not delivered to areas and delivered to areas.

6.2.1 Impact on physical health and wellbeing

There were no perceived changes in physical health from the baseline to the follow-up survey in either area. In delivered to areas, there was a positive shift in the reported impact of upgrading the internet connection on wellbeing. There was no change in not delivered to areas.

In the follow-up survey, most residents who had upgraded their internet connection held the view that upgrading had made no difference to their physical health (71% in not delivered to areas, 78% in delivered to areas). However, 26% of residents in not delivered to areas and 21% in delivered to areas described the impact of upgrading on their physical health as positive. There were no significant differences between the two types of area.

There were no changes from the baseline to the follow-up survey, in either type of area.

Table 6.5: Impact of upgrading on your physical health

Impact of upgrading on your physical health	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Positive impact	19%	26%	24%	21%
Negative impact	4%	3%	4%	1%
Made no difference	75%	71%	71%	78%
Don't know	2%	1%	1%	*%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
** denotes under 1%*

In the follow-up survey, residents who had upgraded their internet connection in delivered to areas, 48%, were more likely than those in not delivered to areas, 37%, to say that upgrading their internet had had a positive impact on their wellbeing. This is a significant increase compared to the baseline 38%.

There were no changes between the survey waves in not delivered to areas.

Table 6.6: Impact of upgrading on your wellbeing

Impact of upgrading on your wellbeing	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Positive impact	37%	37%	38%	48% (A1/B)
Negative impact	4%	4%	6% (B1)	2%
Made no difference	58%	58%	54%	51%
Don't know	1%	1%	1%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
* denotes under 1%

6.2.2 Impact on amount of free time

In not delivered to areas, there was a positive shift in the reported impact of upgrading on the amount of free time. There was no change in delivered to areas.

Findings in the follow-up survey were similar in the two areas for the reported impact upgrading had on the amount of free time. Most residents who had upgraded held the view that it had made no difference to the amount of free time they had (64% in not delivered to areas, 59% in delivered to areas). However, 35% of residents in not delivered to areas and 36% in delivered to areas felt that upgrading had a positive impact.

There were no changes between the two survey waves in delivered to areas.

In not delivered to areas, there was an increase in the proportion that said there had been a positive impact on the amount of free time they had, up from 26% in the baseline survey to 35% in the follow-up survey.

Table 6.7: Impact of upgrading on the amount of free time you have

Impact of upgrading on your free time	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Positive impact	26%	35% (A)	31%	36%
Negative impact	8% (A1)	1%	7%	4%
Made no difference	65%	64%	61%	59%
Don't know	1%	0%	1%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
** denotes under 1%*

6.2.3 Impact on the ease of keeping in touch

In delivered to areas, there was a positive shift in the reported impact of upgrading the internet connection on the ease of keeping in touch with friends and family. There was no change in not delivered to areas.

In the follow-up survey, residents who had upgraded their internet connection in delivered to areas (66%) were more likely than those in not delivered to areas (54%) to say that upgrading had made a positive impact on how easy it is to keep in touch with friends and family that do not live with them. This was also a significant increase of 12 percentage points from the baseline survey.

Residents in not delivered to areas were more likely to say it had made no difference (45%) than those in delivered to areas (33%).

Table 6.8: Impact of upgrading on how easy it is to keep in touch with friends and family who do not live with you

Impact of upgrading on how easy it is to keep in touch with friends and family who do not live with you	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Positive impact	53%	54%	54%	66% (A1/B)
Negative impact	4%	1%	1%	1%
Made no difference	42%	45% (B1)	43% (B1)	33%
Don't know	1%	0%	1%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
** denotes under 1%*

6.2.4 Impact on watching entertainment

In delivered to areas, there was a positive shift in the reported impact of upgrading the internet connection on the ease of watching entertainment programmes and content. There was no change in not delivered to areas.

In the follow-up survey, residents who had upgraded their internet connection in delivered to areas (82%) were more likely than those in not delivered to areas (66%) to say that it had made a positive impact on how easy it is to watch entertainment programmes and content. It was also the case that in delivered to areas, the proportion stating that it had a positive impact had increased by 21 percentage points from the baseline (61%).

Three in ten residents in not delivered to areas stated that it made no difference compared to 17% in delivered to areas.

There were no changes between the survey waves in not delivered to areas.

Table 6.9: Impact of upgrading on how easy it is to watch entertainment programmes and content

Impact of upgrading on how easy it is to watch entertainment programmes	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Positive impact	64%	66%	61%	82% (A1/B)
Negative impact	8%	4% (B1)	7% (B1)	1%
Made no difference	28%	29% (B1)	31% (B1)	17%
Don't know	1%	1%	1%	*%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
** denotes under 1%*

6.2.5 Impact on finding out what is on in the local area

Findings were similar across the two waves, although in delivered to areas there was a fall in the proportion that reported a negative impact of upgrading.

In the follow-up survey, almost half of residents who had upgraded their internet connection held the view that upgrading had made it easy to find out what is going on locally; 46% in not delivered to areas and 49% in delivered to areas described the impact of upgrading as positive. There were no significant differences between the two types of area.

In delivered to areas, there was a fall in the proportion that said upgrading had made a negative impact on how easy it was to find out what is going on in the local area, from 4% at the baseline to less than 1% in the follow-up survey. There were no changes in not delivered to areas.

Table 6.10: Impact of upgrading on how easy it is to find out what is going on in your local area

Impact of upgrading on how easy it is to find out what is going on in your local area	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Positive impact	39%	46%	42%	49%
Negative impact	3%	1%	4% (B1)	*%
Made no difference	56%	52%	53%	50%
Don't know	2%	1%	1%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
** denotes under 1%*

6.2.6 Impact on taking part in activities locally

There were no changes in either delivered to or not delivered to areas in terms of the impact of upgrading on taking part in activities locally.

The majority of residents who upgraded their internet connection felt that it had made no difference to how easy it is to take part in activities locally, such as volunteering. In the follow-up survey, 63% were of this view in not delivered to areas and 71% in delivered to areas. Around three in ten reported a positive impact (31% in not delivered to areas, 26% in delivered to areas). There were no significant differences between the areas.

There were no significant changes between the two waves of the survey in either delivered to or not delivered to areas.

Table 6.11: Impact of upgrading on how easy it is to take part in activities locally including volunteering

Impact of upgrading on how easy it is to take part in activities and volunteer	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Positive impact	26%	31%	29%	26%
Negative impact	3%	1%	1%	1%
Made no difference	69%	63%	67%	71%
Don't know	3%	5%	3%	2%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
** denotes under 1%*

6.2.7 Impact on helping with work

In both areas, reports of a negative impact of upgrading on helping with work declined from the baseline to the follow-up survey.

Opinion was split as to whether an upgraded internet connection has impacted on helping with work. Half of residents who had upgraded (50% in not delivered to areas and 51% in delivered to areas) believed it had a positive impact. A further 46% in both delivered to and not delivered to areas stated that it had made no difference.

The proportion of residents who stated that the upgraded connection had a positive impact on helping with work was significantly higher among residents who were working either full-time (68%) or part-time (65%) compared to those that were not in employment.

Table 6.12: Impact of upgrading on helping you with work

Impact of upgrading on helping with work	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Positive impact	52%	50%	50%	51%
Negative impact	6% (A1)	1%	6% (B1)	1%
Made no difference	40%	46%	42%	46%
Don't know	2%	3%	3%	2%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
** denotes under 1%*

6.2.8 Impact on helping with study

Findings were similar across the two waves of the survey, although in delivered to areas there was a fall in the proportion that reported a negative impact of upgrading.

In the follow-up survey, similar proportions (54% in not delivered to areas, 57% in delivered to areas) said that upgrading had made no difference to helping them study. However, more than a third described upgrading as having had a positive impact (36% in not delivered to areas, 39% in delivered to areas). There were no significant differences between the two areas.

In delivered to areas, there was a fall in the proportion that said upgrading had made a negative impact on helping with study, from 4% in the baseline survey to less than 1% in the follow-up survey.

Table 6.13: Impact of upgrading on helping you with studying

Impact of upgrading on helping with studying	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Positive impact	38%	36%	37%	39%
Negative impact	3%	1%	4% (B1)	*%
Made no difference	57%	54%	56%	57%
Don't know	2%	9% (A/B1)	3%	4%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
** denotes under 1%*

6.2.9 Impact on helping to manage day-to-day life

Findings remained similar between the two waves, although there was a fall in the proportion reporting a negative impact in not delivered to areas.

Almost two-thirds of residents in delivered to areas (65%) felt that upgrading had a positive impact on their ability to manage day-to-day life in the follow-up survey. There was a similar proportion in not delivered to areas (57%). There were no significant differences between the two types of area, nor between the waves of research, other than in not delivered to areas where fewer said that upgrading had a negative impact on managing day-to-day life in the follow-up survey (2%) compared to the baseline survey (6%).

Table 6.14: Impact of upgrading on managing day-to-day life, for example paying bills, everyday shopping and running a household

Impact of upgrading on managing day-to-day life, for example paying bills, everyday shopping and running a household	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Positive impact	56%	57%	56%	65%
Negative impact	6% (A1)	2%	3%	1%
Made no difference	37%	41%	40%	34%
Don't know	1%	0%	1%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (279), Delivered to (219), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (213), Delivered to (261), 20/11/2023 – 17/03/2024
** denotes under 1%*

7 Attitudes to going online

This chapter summarises residents' attitudes towards using the internet generally, whether using it is beneficial or harmful in their opinion, and the impact Coronavirus 'lockdowns' had on having to rely on being online.

7.1 Attitudes to the internet

There were no changes in agreement that 'I cannot imagine life without going online'. In delivered to areas, more residents in the follow-up survey strongly agreed that doing things online saves time. Levels of agreement declined in not delivered to areas.

The proportion strongly agreeing that being able to do things online makes life easier increased in the delivered to area. Residents in delivered to areas were more likely to state that they are constantly looking at their screens these days than others. No changes were seen in either area in the proportion that agreed that technology meant that they found it harder to 'switch off'.

There was a significant increase in those agreeing that they felt addicted to going online within the delivered to areas. Agreement decreased in both areas in terms of relying more on being online since the coronavirus lockdowns.

In the follow-up survey, similar proportions of residents who go online nowadays agreed with the statement that they could not imagine their life without going online (59% in not delivered to areas, 65% in delivered to areas). Neither area showed any significant changes from the baseline to the follow-up survey.

Table 7.1: Attitudes to the internet: I cannot imagine life without going online

Attitudes to the internet: I cannot imagine life without going online	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Strongly agree	35% (B)	31%	30%	31%
Tend to agree	29%	28%	32%	34%
Neither agree nor disagree	12%	13%	10%	9%
Tend to disagree	14%	17%	16%	15%
Strongly disagree	9%	10%	11%	10%
Don't know	0%	*%	*%	*%
NET: Agree	64%	59%	63%	65%
NET: Disagree	24%	27%	27%	25%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (887), Delivered to (862), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (436), Delivered to (381), 20/11/2023 – 17/03/2024
** denotes under 1%*

In the follow-up survey, the majority of residents in both areas agreed that doing things online saved them time (80% in not delivered to areas, 85% in delivered to areas). The proportion strongly agreeing with this statement increased significantly from 49% in the baseline survey to 55% in the follow-up survey within delivered to areas.

In not delivered to areas, there was a fall in agreement from the baseline (86%) to the follow-up survey (80%); specifically, residents were less likely to say that they tended to agree (down from 39% in the baseline survey to 31% in the follow-up survey). At the same time, the level of disagreement increased, from 7% at the baseline to 12% in the follow-up survey, with a rise specifically in the proportion that tended to disagree from 5% in the baseline survey to 8% in the follow-up survey.

Table 7.2: Attitudes to the internet: Doing things online helps me save time

Attitudes to the internet: Doing things online helps me save time	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Strongly agree	46%	49%	49%	55% (B)
Tend to agree	39% (A1)	31%	39% (B1)	30%
Neither agree nor disagree	7%	8%	8%	9%
Tend to disagree	5%	8% (A/B1)	3%	3%
Strongly disagree	2%	5% (A)	2%	3%
Don't know	0%	0%	*%	1%
NET: Agree	86% (A1)	80%	87%	85%
NET: Disagree	7%	12% (A/B1)	5%	6%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (887), Delivered to (862), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (436), Delivered to (472), 20/11/2023 – 17/03/2024
** denotes under 1%*

In the follow-up survey, most residents agreed that being able to do things online makes life easier (89% in not delivered to areas, 90% in delivered to areas). Residents in delivered to areas were more likely to strongly agree (58%) than those in not delivered to areas (51%). Otherwise, there were no differences between the two types of area.

There were no changes from the baseline to the follow-up survey in either area.

Table 7.3: Attitudes to the internet: Being able to do things online makes life easier

Attitudes to the internet: Being able to do things online makes life easier	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Strongly agree	52%	51%	54%	58% (A1)
Tend to agree	36%	38%	36%	32%
Neither agree nor disagree	6%	6%	6%	6%
Tend to disagree	4%	4%	3%	2%
Strongly disagree	1%	2%	1%	2%
Don't know	0%	0%	*%	*%
NET: Agree	88%	89%	90%	90%
NET: Disagree	5%	6%	4%	4%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (887), Delivered to (862), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (436), Delivered to (381), 20/11/2023 – 17/03/2024
** denotes under 1%*

In the follow-up survey, residents in delivered to areas were more likely to agree that they were constantly looking at screens these days (57%) than those in not delivered to areas (50%). In particular, residents in delivered to areas were more likely to 'tend to agree' (29%) than those in not delivered to areas (23%).

In delivered to areas, there were no changes from the baseline to the follow-up survey.

In not delivered to areas, there was a fall in the proportion that said they 'tend to agree', from 31% at the baseline to 23% in the follow-up survey. There was also an increase in those that said they strongly disagreed, from 10% in the baseline survey to 16% in the follow-up survey.

Table 7.4: Attitudes to the internet: I am constantly looking at screens these days

Attitudes to the internet: I am constantly looking at screens these days	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Strongly agree	25%	27%	22%	28%
Tend to agree	31% (A1)	23%	31%	29% (A1)
Neither agree nor disagree	12%	14%	13%	11%
Tend to disagree	22%	21%	24%	20%
Strongly disagree	10%	16% (A)	10%	11%
Don't know	0%	0%	*%	0%
NET: Agree	56%	50%	53%	57% (A1)
NET: Disagree	32%	36%	34%	31%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (887), Delivered to (862), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (436), Delivered to (381), 20/11/2023 – 17/03/2024
** denotes under 1%*

Residents were more likely to disagree than agree with the idea that technology meant that they found it harder to 'switch off'. Findings were similar in the follow-up survey in not delivered to areas (38% agreed and 45% disagreed) and in delivered to areas (36% agreed and 50% disagreed).

There were no changes in opinion across the two waves of the survey either delivered to or not delivered to areas.

Table 7.5: Attitudes to the internet: Technology means that I find it harder to 'switch off'

Technology means that I find it harder to 'switch off'	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Strongly agree	11%	15%	11%	11%
Tend to agree	27%	23%	24%	25%
Neither agree nor disagree	16%	17%	17%	13%
Tend to disagree	30%	28%	29%	30%
Strongly disagree	15%	17%	18%	20%
Don't know	*%	0%	*%	*%
NET: Agree	39%	38%	35%	36%
NET: Disagree	45%	45%	47%	50%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (887), Delivered to (862), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (436), Delivered to (381), 20/11/2023 – 17/03/2024
** denotes under 1%*

The majority of residents disagreed that they felt addicted to going online. In the follow-up survey, 63% disagreed in not delivered to areas and 62% disagreed in delivered to areas. There were no differences between the two types of area.

In delivered to areas, there was an increase in agreement from the baseline (17%) to the follow-up (23%). There was also a fall in the proportion that said they 'tend to disagree', from 36% in the baseline survey to 29% in the follow-up survey.

There were no changes in not delivered to areas.

Table 7.6: Attitudes to the internet: I feel addicted to going online

Attitudes to the internet: I feel addicted to going online	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Strongly agree	7%	6%	5%	7%
Tend to agree	15%	15%	13%	15%
Neither agree nor disagree	17%	16%	17%	15%
Tend to disagree	32%	31%	36% (B1)	29%
Strongly disagree	29%	32%	29%	33%
Don't know	0%	0%	*%	0%
NET: Agree	22% (B)	21%	17%	23% (B)
NET: Disagree	61%	63%	65%	62%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (887), Delivered to (862), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (436), Delivered to (381), 20/11/2023 – 17/03/2024
** denotes under 1%*

It should be noted that the question wording differed in the baseline and the follow-up survey. At the baseline, the statement was: "during the coronavirus 'lockdowns' I relied on being online more than ever". At the follow-up, this was changed to: "I rely on being online more than I did before the coronavirus 'lockdowns'". This change needs to be taken into account when considering differences between the two waves.

Around half of residents in the follow-up survey agreed that they relied on being online more than they did before the coronavirus lockdowns (53% in not delivered to areas, 52% in delivered to areas). In both cases this is a significant fall compared to the baseline (76% in not delivered to areas and 72% in delivered to areas).

Table 7.7: Attitudes to the internet: During the Coronavirus 'lockdowns' I relied on being online more than ever

Attitudes to the internet: During the coronavirus 'lockdowns' I relied on being online more than ever	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Strongly agree	51% (A1/B)	32% (B1)	44% (B1)	25%
Tend to agree	26% (A1)	20%	28%	28% (A1)
Neither agree nor disagree	11%	20% (A)	12%	24% (B)
Tend to disagree	10%	19% (A)	11%	15% (B)
Strongly disagree	3%	8% (A)	5% (A)	8% (B)
Don’t know	0%	*%	*%	*%
NET: Agree	76% (A1/B)	53%	72% (B1)	52%
NET: Disagree	12%	27% (A)	16% (A)	24% (B)

Source: Household survey of adults aged 18+
Baseline: Not delivered to (887), Delivered to (862), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (436), Delivered to (381), 20/11/2023 – 17/03/2024
** denotes under 1%*

8 Wellbeing

The baseline survey included five standardised Office of National Statistics questions - four on wellbeing, and a fifth question on loneliness. Improved wellbeing is a primary outcome measure for the wider evaluation.

Responses from residents in this household survey have been compared against the ONS Opinions and Lifestyle Survey[5] although differences in data collection methods mean that comparisons are indicative.

8.1 Satisfied with life nowadays

No changes were seen in life satisfaction scores among residents in either the delivered to or not delivered to areas.

In the follow-up survey, the mean satisfaction scores for residents in both areas (7.9 in not delivered to areas, 8.0 in delivered to areas) were both higher than the Opinions Lifestyle Survey mean score of 7.0. Overall, more than four in five residents (86% in not delivered to areas, 87% in delivered to areas) provided a satisfaction score categorised as high or very high. There were no differences between the two types of area.

Results remained consistent across the two waves of the survey, in both types of area.

Table 8.1: Satisfied with life nowadays

Satisfied with life nowadays	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Low (score 0 to 4)	5%	4%	4%	3%
Medium (score 5 to 6)	12%	10%	12%	9%
High (score 7 to 8)	49%	49%	47%	50%
Very high (score 9 to 10)	34%	37%	37%	37%
Mean	7.8	7.9	7.9	8.0

Source: Household survey of adults aged 18+
Baseline: Not delivered to (889), Delivered to (844), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (437), Delivered to (379), 20/11/2023 – 17/03/2024
** denotes under 1%*

When the sample was restricted to just those households which had completed the survey in the baseline and follow-up stages, a similar pattern was observed – there was a slight

[5] Opinions and Lifestyle Survey (2022). Adults 16+ in Great Britain, online and telephone survey, sample size for wellbeing questions and loneliness varied between 3060 and 3100.

decrease in satisfaction in not delivered to areas (non-significant). However, there was also a small, non-significant decrease in satisfaction in delivered to areas as well.

Table 8.2: Satisfied with life nowadays (Sample restricted to those that completed Wave 1 and Wave 2 research)

Satisfied with life nowadays	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Low (score 0 to 4)	4%	5%	3%	3%
Medium (score 5 to 6)	11%	10%	9%	9%
High (score 7 to 8)	50%	49%	45%	50%
Very high (score 9 to 10)	34%	35%	44%	37%
Mean	7.9	7.8	8.2	8

Source: Household survey of adults aged 18+
Not delivered to (450), Delivered to (389)
** denotes under 1%*

8.2 Worthwhile

The scores for feeling worthwhile improved in delivered to areas, while there was no change in not delivered to areas.

In the follow-up survey, the mean score for feeling worthwhile was 8.2 in not delivered to areas and 8.3 in delivered to areas, compared with the ONS equivalent of 7.3. There were no differences between the two areas on this wellbeing measure.

In delivered to areas, there was an increase in the mean score from the baseline survey (8.0) to the follow-up survey (8.3). There was also an increase in the proportion of high scores, from 42% at the baseline to 48% in the follow-up survey, and a fall in the proportion of low scores, from 5% in the baseline survey to 2% in the follow-up survey.

There were no changes in not delivered to areas.

Table 8.3: Feeling things you do in your life are worthwhile

Extent to which you feel things you do in your life are worthwhile	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Low (score 0 to 4)	3%	3%	5% (A/B1)	2%
Medium (score 5 to 6)	11%	9%	9%	7%
High (score 7 to 8)	46%	47%	42%	48% (B)
Very high (score 9 to 10)	40%	41%	44%	44%
Mean	8.1	8.2	8.0	8.3 (B)

Source: Household survey of adults aged 18+
Baseline: Not delivered to (891), Delivered to (842), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (435), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

When the sample was restricted to just those households which had completed the survey in the baseline and follow-up stages, again no significant changes between baseline and follow-up were observed in the average scores for both areas and an overall similar pattern was observed.

Table 8.4: Feeling things you do in your life are worthwhile (Sample restricted to those that completed Wave 1 and Wave 2 research)

Extent to which you feel things you do in your life are worthwhile	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Low (score 0 to 4)	2%	3%	5% (A/B1)	2%
Medium (score 5 to 6)	10%	10%	6%	7%
High (score 7 to 8)	45%	45%	39%	48% (B)
Very high (score 9 to 10)	44%	42%	50%	44%
Mean	8.0	8.1	8.0	8.3

Source: Household survey of adults aged 18+
Not delivered to (450), Delivered to (389)
** denotes under 1%*

8.3 Happiness

On the happiness measure, there was no change in delivered to areas but a marginal negative shift was seen in not delivered to areas.

The mean score for the happiness measure in the follow-up survey was 7.7 in not delivered to areas and 7.8 in delivered to areas. These are both higher than the score of 7.0 in the ONS

Opinions and Lifestyle Survey. There were no differences between the two areas on this measure.

There were no changes from the baseline to the follow-up survey in delivered to areas.

In not delivered to areas there was an increase in the proportion of low scores, from 5% at the baseline to 9% in the follow-up survey.

Table 8.5: Happiness yesterday

Happiness yesterday	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Low (score 0 to 4)	5%	9% (A)	8% (A)	5%
Medium (score 5 to 6)	14%	13%	12%	13%
High (score 7 to 8)	41%	41%	41%	42%
Very high (score 9 to 10)	39%	37%	39%	39%
Mean	7.8	7.7	7.7	7.8

Source: Household survey of adults aged 18+
Baseline: Not delivered to (887), Delivered to (841), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (437), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

When the sample was restricted to just those households which had completed the survey in the baseline and follow-up stages, a similar pattern was observed – there was a non-significant decrease in the happiness scores for households in non-delivered to areas, but in the restricted sample there was also a non-significant decrease in households in delivered to areas, which is not observed in the total sample.

Table 8.6: Happiness yesterday (Sample restricted to those that completed Wave 1 and Wave 2 research)

Happiness yesterday	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Low (score 0 to 4)	5%	9% (A)	8% (A)	5%
Medium (score 5 to 6)	15%	13%	10%	13%
High (score 7 to 8)	37%	42%	36%	42%
Very high (score 9 to 10)	42%	36%	47%	39%
Mean	7.9	7.6	7.9	7.8

Source: Household survey of adults aged 18+
Not delivered to (450), Delivered to (389)
** denotes under 1%*

8.4 Anxiety

There were no substantive changes in either area in scores for feeling anxious.

In the follow-up survey, over eight in ten residents (81% in not delivered to and 80% in delivered to areas) had a very low score for feeling anxious. The mean scores of 2.2 in not delivered to areas and 2.3 in delivered to areas were both almost half that of the mean score in the ONS Opinions and Lifestyle Survey (4.0). There were no differences between the two types of area.

No changes were seen in delivered to areas from the baseline to the follow-up survey.

In not delivered to areas, there was a fall in the proportion of low scores, from 13% at the baseline to 7% in the follow-up survey. Otherwise, scores remained consistent between the two waves.

Table 8.7: Anxious yesterday

Anxious yesterday	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Very low (score 0 to 1)	76%	81%	75%	80%
Low (score 2 to 3)	13% (A1)	7%	13%	9%
Medium (score 4 to 5)	8%	10%	8%	9%
High (score 6 to 10)	3%	2%	3%	2%
Mean	2.4	2.2	2.4	2.3

Source: Household survey of adults aged 18+
Baseline: Not delivered to (888), Delivered to (843), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (437), Delivered to (377), 20/11/2023 – 17/03/2024
** denotes under 1%*

When the sample was restricted to just those households which had completed the survey in the baseline and follow-up stages, a different pattern was observed. There was no change in average anxiety score in the households in not delivered to areas between baseline and follow-up surveys. However, there was a non-significant increase in anxiety scores for delivered to areas.

Table 8.8: Anxious yesterday (Sample restricted to those that completed Wave 1 and Wave 2 research)

Anxious yesterday	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Very low (score 0 to 1)	54%	50%	58%	50%
Low (score 2 to 3)	17%	27%	19%	21%
Medium (score 4 to 5)	14%	9%	11%	14%
High (score 6 to 10)	15%	14%	13%	15%
Mean	2.2	2.2	2.0	2.3

Source: Household survey of adults aged 18+
Not delivered to (450), Delivered to (389)
** denotes under 1%*

8.5 Loneliness

Residents in delivered to areas were significantly more likely to state that they 'never' feel lonely compared to not delivered to areas.

There were some slight differences between the areas in the follow-up survey. Residents in not delivered to areas (20%) were more likely than those in delivered to areas (11%) to say they occasionally felt lonely. The proportion that said they never felt lonely was higher in delivered to areas (46%) than in not delivered to areas (37%).

The proportion of residents who reported often or always feeling lonely, 2% in both areas, was significantly lower than the 7% recorded by the ONS Opinions and Lifestyle Survey.

There were no changes from the baseline to the follow-up survey in delivered to areas.

In not delivered to areas, there was a fall in the proportion that said they never felt lonely, from 44% at the baseline to 37% in the follow-up survey.

Table 8.9: Loneliness

Loneliness	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)	Community Life Survey
Often/always	3%	2%	3%	2%	7%
Some of the time	8%	6%	8%	6%	19%
Occasionally	15%	20% (B1)	12%	11%	23%
Hardly ever	27%	32%	27%	31%	30%
Never	44% (A1)	37%	45%	46% (A1)	20%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

When the sample was restricted to just those households which had completed the survey in the baseline and follow-up stages, the same pattern was observed. There were similar proportions of households in each category at the baseline and follow-up waves, for both areas.

Table 8.10: Loneliness (Sample restricted to those that completed Wave 1 and Wave 2 research)

Loneliness	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)	ONS Opinions and Lifestyle Survey
Often/always	3%	3%	3%	2%	7%
Some of the time	9%	6%	7%	6%	19%
Occasionally	15%	21% (B1)	12%	11%	23%
Hardly ever	28%	33%	33%	32%	30%
Never	45% (A1)	38%	45%	48% (A1)	20%

Source: Household survey of adults aged 18+
Not delivered to (450), Delivered to (389)
** denotes under 1%*

9 Non-internet users

Overall, 3% of residents (22 participants) never went online nowadays in the follow-up survey - 3% in the not delivered to areas and 2% in delivered to areas. Data published by Ofcom[6] in 2022 found that 1% of adults never use the internet.

This chapter describes the reasons given for never going online, what impact, if any, these residents perceive that has on their lives and whether they would like to go online in the future. Due to the small base sizes, no comparison has been made between the individual areas nor between the survey waves. The data within the tables is for information only.

9.1 Reasons for not going online

A small proportion (3%) of residents said they never go online nowadays. The survey asked them why they choose not to go online, either outside the home or when at home using a fixed internet connection.

In total, 37% stated that that it was not for people their age, a further 16% said it was because they were not interested and 15% believed it to be too difficult to use.

[6] Ofcom Tech Tracker Survey (2022). Adults 16+ in UK, in-home survey, sample 4,000.

Table 9.1: Reasons for not going online, most important reason

Reasons for not going online (unprompted)	Baseline Most important reason (A)	Follow-up Most important reason (A1)
I am just not interested	40%	16%
It's not for people of my age	17%	37%
It's not for people like me	1%	
It's too difficult to use	5%	15%
I am worried about my privacy	4%	
I have no connection available where I live or where I work	6%	4%
I worry about being conned or having money stolen	3%	0%
I worry about bad experiences with SPAM or viruses	1%	0%
It's too expensive	3%	0%
I worry about having my personal details stolen	0%	0%
Do not yet know how to go online	1%	0%
There's nothing of interest online	0%	0%
I do not have enough time	0%	0%
It is too time consuming	0%	0%
It is not useful	0%	0%
Other	17%	27%
Don’t know	4%	0%

Source: Household survey of adults aged 18+
Baseline: Never go online nowadays (74), 8/11/2021 – 10/01/2022
Follow-up: Never go online nowadays (22), 20/11/2023 – 17/03/2024
** denotes under 1%*

9.2 Impact of not going online

The following commentary summarises the responses given to a set of statements by residents who never go online nowadays.

9.2.1 Missing out

In the follow-up survey, one in six residents who never go online (17%) agreed they miss out by not going online or using email. By contrast, 83% disagreed, including 70% who strongly disagreed.

Table 9.2: I miss out by not going online or using e-mail

I miss out by not going online or using e-mail	Baseline Never go online nowadays (A)	Follow-up Never go online nowadays (A1)
Strongly agree	1%	9%
Tend to agree	8%	9%
Neither agree nor disagree	12%	0%
Tend to disagree	17%	13%
Strongly disagree	58%	70%
Don't know	4%	0%
Net: Agree	9%	17%
Net: Disagree	75%	83%

Source: Household survey of adults aged 18+
Baseline: Never go online nowadays (74), 8/11/2021 – 10/01/2022
Follow-up: Never go online nowadays (22), 20/11/2023 – 17/03/2024
** denotes under 1%*

9.2.2 Feeling left out

Most residents who never go online disagreed that they feel left out when their friends talk about being online. In the follow-up survey, 85% disagreed with this, including 68% who strongly disagreed. Around one in ten (9%) agreed that they sometimes feel left out.

Table 9.3: I sometimes feel left out when my friends talk about being online

I sometimes feel left out when my friends talk about being online	Baseline Never go online nowadays (A)	Follow-up Never go online nowadays (A1)
Strongly agree	1%	0%
Tend to agree	9%	9%
Neither agree nor disagree	11%	6%
Tend to disagree	25%	17%
Strongly disagree	52%	68%
Don't know	1%	0%
Net: Agree	10%	9%
Net: Disagree	77%	85%

Source: Household survey of adults aged 18+
Baseline: Never go online nowadays (74), 8/11/2021 – 10/01/2022
Follow-up: Never go online nowadays (22), 20/11/2023 – 17/03/2024
** denotes under 1%*

9.2.3 Feel better off not going online

In the follow-up survey, three in four residents who never go online (75%) agreed with the statement 'I am better off not going online'; just over half (54%) strongly agreed and 22% tended to agree. However, 12% disagreed.

Table 9.4: I am better off not going online

I am better off not going online	Baseline Never go online nowadays (A)	Follow-up Never go online nowadays (A1)
Strongly agree	33%	54%
Tend to agree	21%	22%
Neither agree nor disagree	17%	9%
Tend to disagree	5%	0%
Strongly disagree	13%	12%
Don't know	11%	4%
Net: Agree	54%	75%
Net: Disagree	17%	12%

Source: Household survey of adults aged 18+
Baseline: Never go online nowadays (74), 8/11/2021 – 10/01/2022
Follow-up: Never go online nowadays (22), 20/11/2023 – 17/03/2024
** denotes under 1%*

9.2.4 Perform better in daily tasks

In the follow-up survey, around three in four of those who never go online (73%) disagreed that they could perform better in their daily tasks if they could go online, including 65% who disagreed strongly. Around one in six (16%) agreed with the statement.

Table 9.5: I could perform better in my daily tasks if I could go online

I could perform better in my daily tasks if I could go online	Baseline Never go online nowadays (A)	Follow-up Never go online nowadays (A1)
Strongly agree	1%	4%
Tend to agree	7%	12%
Neither agree nor disagree	16%	11%
Tend to disagree	16%	8%
Strongly disagree	51%	65%
Don't know	9%	0%
Net: Agree	8%	16%
Net: Disagree	67%	73%

Source: Household survey of adults aged 18+
Baseline: Never go online nowadays (74), 8/11/2021 – 10/01/2022
Follow-up: Never go online nowadays (22), 20/11/2023 – 17/03/2024
** denotes under 1%*

9.2.5 Would like to go online in the future

Among those who never go online, around one in five at the follow-up survey (19%) agreed that they would like to go online in the future, while 81% disagreed with this statement, including 65% who disagreed strongly.

Table 9.6: I would like to go online in the future

I would like to go online in the future	Baseline Never go online nowadays (A)	Follow-up Never go online nowadays (A1)
Strongly agree	2%	7%
Tend to agree	6%	12%
Neither agree nor disagree	10%	0%
Tend to disagree	11%	15%
Strongly disagree	67%	65%
Don't know	3%	0%
Net: Agree	9%	19%
Net: Disagree	79%	81%

Source: Household survey of adults aged 18+
Baseline: Never go online nowadays (74), 8/11/2021 – 10/01/2022
Follow-up: Never go online nowadays (22), 20/11/2023 – 17/03/2024
** denotes under 1%*

10 Analysis of impact of the Superfast Broadband Programme

The analytical framework used to assess the impact of the Superfast Broadband Programme is presented in Annex C. The key results from this analysis are presented in the Table below. The key results show that:

- The Superfast Broadband Programme has had a positive impact on:
  - **Internet connection speeds:** The average speeds for households in delivered to areas has increased at a faster rate than for those in not delivered to areas. Where households provided their actual speeds via a speed test at both the baseline and follow-up waves of the survey, actual speeds increased by between 24% and 56%. Where speeds were provided as a band, the provision of Superfast Broadband coverage increased the provision of Superfast Broadband Programme coverage led to an increase in the probability of being in a higher speed band by between 46% and 92%.
  - **Satisfaction with internet connection:** There was an improvement in the levels of reported satisfaction with internet connection for households in delivered to areas. The provision of the Superfast Broadband Programme coverage led to an increase in the probability of the household being in a higher satisfaction band by between 30% and 45%.
  - **Improvements in reliability:** There was an improvement in the levels of reported reliability of the internet connection for households in delivered to areas. The provision of the Superfast Broadband Programme coverage led to an increase in the probability of the household being in a higher satisfaction band by between 21% and 29%.
  - **Improvements in perceived value for money of internet connections:** There was an improvement in the levels of reported value for money of the internet connection for households in delivered to areas. The provision of the Superfast Broadband Programme coverage led to an increase in the probability of the household being in a higher value for money satisfaction band by between 26% and 38%.
  - **Improvements in overall rating of the internet connection:** There was an improvement in the levels of reported rating of the internet connection for households in delivered to areas. The provision of the Superfast Broadband Programme coverage led to an increase in the probability of the household being in a higher rating band by between 31% and 45%.

- **There are no statistically significant increases in self-reported wellbeing measures** as a result of the Superfast Broadband Programme for four of the five wellbeing measures – life satisfaction, feeling worthwhile, happiness, and loneliness. There was a slightly positive impact on feelings of anxiety (at the 90% significance level) in two of the three model specifications, indicating the programme may have had a positive effect on levels of anxiety. The provision of the Superfast Broadband Programme is estimated to have led to an improvement in the anxiety wellbeing score of between 0.7 and 1 – however, the number of responses included in the analysis of this outcome is much lower than for the other wellbeing measures. It is unclear if the lack of statistically significant results were a result of the Programme having no impact on wellbeing or if the measures used are insufficiently sensitive to small, and potentially temporary changes to wellbeing. Therefore, alternative approaches to estimating the public benefit of the Superfast Broadband Programme have been used in the evaluation.

- **There appears to be a slight impact of the provision of Superfast Broadband Programme on the ability to Work From Home (WFH).** The provision of the Superfast Broadband Programme is estimated to have led to an increase in the number of days WFH of between 0.7 and 0.8 days per week. However, the sample for this analysis is relatively low, as it only includes those that were employed in both waves of the survey.

- **It is estimated that there has been no impact from the provision of superfast broadband on commuting time, despite the increased prevalence of WFH.**

- There appears to have been a **slightly negative impact of the provision of Superfast Broadband on volunteering frequency** (at the 90% Confidence Level). The provision of the Superfast Broadband Programme is estimated to have led to a reduction in frequency of residents volunteering by between 25% and 32%.

Table 10.1: Estimated direct impact of Superfast Broadband Programme using regression-based difference-in-difference approach

Outcome	Model 1	Model 2	Model 3	Model 4	Model 5	Model 6	Model 7	Model 8	Model 9
Outcome	**Actual connection speed**			**Speed band**			**Satisfaction with speed**		
Modelling approach	OLS	OLS	OLS	Logit	Logit	Logit	Logit	Logit	Logit
Demographic controls	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No
Broadband usage controls	No	Yes	Yes	No	Yes	Yes	No	Yes	Yes
PSM used	No	No	Yes	No	No	Yes	No	No	Yes
Number of observations	845	831	614	893	893	650	1,227	1,277	896
Impact of Superfast Broadband coverage	0.564***	0.378**	0.243	1.174***	0.823***	0.803**	-0.872***	-0.658***	-0.758***

Outcome	Model 10	Model 11	Model 12	Model 13	Model 14	Model 15	Model 16	Model 17	Model 18
Outcome	**Satisfaction with reliability**			**Satisfaction with VfM**			**Rating of internet connection**		
Modelling approach	Logit	Logit	Logit	Logit	Logit	Logit	Logit	Logit	Logit
Demographic controls	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No
Broadband usage controls	No	Yes	Yes	No	Yes	Yes	No	Yes	Yes
PSM used	No	No	Yes	No	No	Yes	No	No	Yes
Number of observations	1,238	1,238	901	1,184	1,184	861	1,229	1,229	895
Impact of Superfast Broadband coverage	-0.743***	-0.581***	-0.584**	-0.754***	-0.559**	-0.783***	-0.940***	-0.732***	-0.784***

*Source: Ipsos analysis; *** represents differences significant at 99 percent, ** at 95 percent and * at 90 percent*

Table 10.2: Estimated downstream impact of Superfast Broadband Programme using regression-based difference-in-difference approach

Outcome	Model 1	Model 2	Model 3	Model 4	Model 5	Model 6	Model 7	Model 8	Model 9
Outcome	**Volunteering frequency band**			**WFH frequency**			**Commuting time**		
Modelling approach	Logit	Logit	Logit	OLS	OLS	OLS	OLS	OLS	OLS
Demographic controls	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No
Broadband usage controls	No	Yes	Yes	No	Yes	Yes	No	Yes	Yes
PSM used	No	No	Yes	No	No	Yes	No	No	Yes
Number of observations	1,312	1,236	899	522	505	362	522	505	362
Impact of Superfast Broadband coverage	0.429**	0.438*	0.567**	0.735***	0.787***	0.771**	0.218*	0.205	0.235

Outcome	Model 10	Model 11	Model 12	Model 13	Model 14	Model 15	Model 16	Model 17	Model 18
Outcome	**Life satisfaction**			**Worthwhile**			**Happy**		
Modelling approach	OLS	OLS	OLS	OLS	OLS	OLS	OLS	OLS	OLS
Demographic controls	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No
Broadband usage controls	No	Yes	Yes	No	Yes	Yes	No	Yes	Yes
PSM used	No	No	Yes	No	No	Yes	No	No	Yes
Number of observations	1,302	1,225	896	1,290	1,214	880	1,294	1,217	890
Impact of Superfast Broadband coverage	0.0257	0.0655	0.0782	-0.0268	0.0103	-0.115	0.284	0.283	0.259

Outcome	Model 19	Model 20	Model 21	Model 22	Model 23	Model 24
Outcome		**Anxious**			**Lonely**	
Modelling approach	OLS	OLS	OLS	OLS	OLS	OLS
Demographic controls	Yes	Yes	No	Yes	Yes	No
Broadband usage controls	No	Yes	Yes	No	Yes	Yes
PSM used	No	No	Yes	No	No	Yes
Number of observations	524	507	350	1,264	1,190	866
Impact of Superfast Broadband coverage	0.773*	1.023**	0.715	0.0821	0.0723	0.0792

*Source: Ipsos analysis; *** represents differences significant at 99 percent, ** at 95 percent and * at 90 percent*

Annex

A: Profile of residents using a home internet connection

The tables in this chapter set out the socio-demographic profile of those residents who go online using a home internet connection. Instances of statistically significant differences have been highlighted in the tables, between those living in not delivered to and delivered to areas, as well as between interviews at the baseline and those at the follow-up survey. Where available, comparisons are also made to national population data.

The data have been weighted[7] to match the control group (the not delivered to sample) to the treatment group (the delivered to sample) and, as a result, there were few statistically significant differences. Annex C presents the socio-demographic profile of the unweighted data for each sample area.

Gender

Overall, over half of residents who go online using a home internet connection were male, 60% in both types of area in the follow-up survey. (ONS[8], population estimates for Great Britain are 49% male and 51% female).

There were no differences between the two areas, and no changes from the baseline to the follow-up survey.

Table 10.3: Gender

Gender	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Male	54%	60%	56%	60%
Female	45%	40%	44%	40%
In another way	0%	0%	0%	0%
Prefer not to answer	*%	0%	0%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

[7] PSM weighting applied using variables gender, age, social grade, work status, housing tenure, rural/urban
8 ONS, Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland, Mid-2020 edition (republished with uncertainty measures added in February 2022)

Age

Residents who go online using a home internet connection had an older age profile at the follow-up than at the baseline, in both areas.

In the follow-up survey, almost a quarter of residents who go online using a home internet connection were aged between 18-44 (23% in not delivered to and 21% in delivered to areas). More than a third were aged 65 or over (39% in both types of areas). There were no differences between the two areas. ONS[9] population estimates for Great Britain are as follows: 18-24: 8%; 25-34: 13%; 35-44: 13%; 45-54: 13%; 55-64: 12%; 65-74: 10%; and 75+: 9%.

In delivered to areas, 19% of residents who go online using a home internet connection were aged 65-74 at the baseline. This increased to 26% at the follow-up. The same pattern applied to not delivered to areas, with the proportion of 65-74 year olds rising from 18% at the baseline to 26% in the follow-up survey.

Table 10.4: Age

Age	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
18-24	2%	1%	3%	3%
25-34	8%	7%	8%	5%
35-44	17%	15%	16%	13%
45-54	19%	17%	18%	16%
55-64	26%	21%	25%	23%
65-74	18%	26% (A)	19%	26% (B)
75+	10%	13%	10%	13%
Refused	0%	0%	*%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

Size of household and presence of children

Average household size decreased in not delivered to areas, with no change in delivered to areas.

In the follow-up survey, the average size of the household was similar in the two areas (2.4 in not delivered to areas and 2.5 in delivered to areas).

There were no changes between the two waves of the survey in delivered to areas.

[9] ONS, Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland, Mid-2020 edition (republished with uncertainty measures added in February 2022)

In not delivered to areas, the average household size decreased from 2.6 at the baseline to 2.4 in the follow-up survey. There was a fall in the proportion of households with three or more people from 41% in the baseline survey to 35% in the follow-up survey.

This data corroborates with ONS figures in that 100% of surveyed households in Great Britain with 2 adults confirmed they had internet access, followed by 97% of 3+ person households and 95% of single person households[10].

Table 10.5: Size of household

Size of household	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Single person household	15%	16%	16%	15%
2 per household	44%	49%	49% (A)	50%
3+ per household	41% (A1/B)	35%	35%	35%
Mean	2.6 (A1)	2.4	2.5	2.5

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

The household composition in both areas was similar; around a quarter of households included children aged under 15 (21% in not delivered to areas, 22% in delivered to areas at the follow-up survey). According to ONS in 2020, 100% of households with children had internet access.

There were no changes between the two survey waves in either area.

Table 10.6: Household composition: presence of children

Household composition: presence of children	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Single person household	15%	16%	16%	15%
No children in the household	60%	63%	61%	63%
Children in the household	26%	21%	23%	22%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

[10] Internet Access – Households and individuals, August 2020. Base: Households in Great Britain.

Occupation status

In both areas there was a fall in the proportion of residents working full-time.

In the follow-up survey, more than half of residents were working, either full-time or part-time whether in an employed or self-employed capacity (57% in not delivered to areas, 56% in delivered to areas). This included 37% in both types of area who were working full-time. More than a third were retired (37% in not delivered to areas, 39% in delivered to areas). There were no differences between the two areas.

In delivered to areas, the proportion of working residents decreased from the baseline (61%) to the follow-up survey (56%). Specifically, there was a fall in the proportion working full-time from 43% in the baseline survey to 37% in the follow-up survey. The proportion of retired residents increased from 29% at the baseline to 39% in the follow-up survey, as did the overall proportion of those who were not working, from 37% at the baseline to 43% in the follow-up survey.

In not delivered to areas, there was also a fall in the proportion of residents who were working full-time, from 45% at the baseline to 37% in the follow-up survey. The proportion of retired residents increased, from 29% in the baseline survey to 37% in the follow-up survey.

Table 10.7: Occupation status

Occupation status	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Have paid job - full-time (30+ hours per week)	45% (A1)	37%	43% (B1)	37%
Have paid job - part-time (8-29 hours per week)	7%	7%	7%	7%
Have paid job - part-time (Under 8 hours per week)	*%	1%	1%	1%
Not in paid work - full-time housework and/or caring	2%	1%	2%	1%
Self-employed (full time)	7%	9%	8%	9%
Self-employed (part time)	2%	4%	1%	2%
Studying	1%	1%	2%	1%
Unemployed and seeking work	1%	2%	1%	*%
Retired	29%	37% (A)	29%	39% (B)
Not in paid work because of long term illness or disability	2%	2%	3%	2%
Not in paid work for other reason	3%c	1%	2%	1%
NET: Working	62%	57%	61% (B1)	56%
NET: Not in paid work	37%	42%	37%	43% (B)
Refused	0%	0%	*%	*%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

Educational attainment

Delivered to areas saw a fall in the proportion that had no formal qualifications. There were no changes in not delivered to areas.

Similar proportions in the two areas had a formal qualification, ranging from GCSEs to a Masters degree or equivalent (81% in not delivered to areas, 82% in delivered to areas in the follow-up survey). In both areas, 8% had no formal qualifications in the follow-up survey.

In delivered to areas, the proportion that had no formal qualifications decreased from the baseline (12%) to the follow-up survey (8%). There were no changes in not delivered to areas.

Table 10.8: Highest educational or professional attainment

Highest educational or professional attainment	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
GCSE/O-Level/CSE	13%	14%	11%	12%
Vocational qualifications (=NVQ1+2)	7%	8%	7%	7%
A-Level or equivalent (=NVQ3)	19%	19%	18%	21%
Bachelor Degree or equivalent (=NVQ4)	31%	28%	29%	27%
Masters/PhD or equivalent	15%	12%	15%	16%
Other	6%	8%	6%	9%
No formal qualifications	7%	8%	12% (A/B1)	8%
Still studying	*%	*%	*%	0%
Don’t know	1%	2%	1%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

Social grade

Three-quarters of residents were in the higher social grade groupings, ABC1 (76% in both types of area at the follow-up survey). There were no differences between the two areas, and no changes from the baseline to the follow-up survey.

Table 10.9: Social grade

Social grade	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
A	11%	16% (A)	12%	16%
B	28%	28%	29%	27%
C1	35%	33%	35%	33%
C2	16%	14%	14%	14%
D	6%	6%	6%	7%
E	4%	4%	4%	4%
Net: ABC1	74%	76%	76%	76%
Net C2DE	26%	24%	24%	24%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

Household income

Average household income increased in delivered to areas, but there was no clear change in not delivered to areas.

In the follow-up survey, only a small proportion of residents had an annual household income below £14,500 (6% in not delivered to areas, 4% in delivered to areas). More than a third said their household income was £50,000 or more per year (35% in not delivered to areas, 40% in delivered to areas). There were no significant differences between the two areas.

In delivered to areas, there was an increase in the proportion reporting a household income of between £14,500-£49,999 per year from 28% at the baseline to 35% at the follow-up; and in the proportion stating their income as £50,000 or more per year, up from 28% in the baseline survey to 40% in the follow-up survey. Residents were more likely to give an answer at the follow-up survey; the proportion that preferred not to disclose their household income fell from 33% at the baseline to 15% in the follow-up survey.

In not delivered to areas, the proportion that preferred not to disclose their household income also fell, from 25% at the baseline to 18% in the follow-up survey. There were no other significant changes in not delivered to areas.

Table 10.10: Household income

Household income	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Up to £86 per week | Up to £374 per month | Up to £4,499 per year	*%	1%	*%	*%
£87 - £182 per week | £375 - £791 per month | £4,500 to £9,499 per year	2%	2%	1%	2%
£183 - £278 per week | £792 - £1,208 per month | £9,500 - £14,499 per year	4%	4%	4%	2%
£279 - £336 per week | £1,209 - £1,458 per month | £14,500 - £17,499 per year	5%	6%	3%	4%
£337 - £576 per week | £1,459 - £2,499 per month | £17,500 - £29,999 per year	12%	14%	9%	12%
£577 - £961 per week | £2,500 - £4,166 per month | £30,000 - £49,999 per year	16%	17%	16%	19%
£962 or more per week | £4,167 or more per month | £50,000 or more per year	32% (B)	35%	28%	40% (B)
NET: Up to £14,499 per year	6%	6%	6%	4%
NET: Between £14,500 – £49,999 per year	33% (B)	37%	28%	35% (B)
NET: £50,000 or more per year	32% (B)	35%	28%	40% (B)
Don't know	4%	4%	6%	5%
Prefer not to say	25% (A1)	18%	33% (A/B1)	15%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

Housing tenure

There was a fall in the proportion of renters in both types of area.

In the follow-up survey, similar proportions owned their home outright (53% in not delivered to areas, 55% in delivered to areas). A further 31% in both areas were homeowners paying off a mortgage or loan.

In delivered to areas, there was a decrease in the proportion that were renting their home; specifically, those renting from a private landlord (from 11% at the baseline to 6% in the follow-up survey); and those renting from the council (from 6% at the baseline to 3% in the follow-up survey.

In not delivered to areas, there was also a decrease in the proportion that were renting from a private landlord, from 12% at the baseline to 7% in the follow-up survey.

Table 10.11: Housing tenure

Housing tenure	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Own it outright	51%	53%	52%	55%
Buying it with the help of a mortgage or loan	28%	31%	28%	31%
Part own and part rent (shared ownership)	*% (B)	*%	0%	*%
Rent it from a private landlord	12% (A1)	7%	11% (B1)	6%
Rent it from a local council	4%	4%	6% (B1)	3%
Rent it from a housing association	2% (B)	2%	1%	2%
Live here rent-free (including rent-free in relative's/friend's property but excluding squatters)	1%	2%	1%	2%
Occupy it in some other way	1%	1%	1%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

Health and disability

There were no significant changes in reported health in either area between the two survey waves.

Few residents reported that their health in general was either bad or very bad (3% in not delivered to areas, 5% in delivered to areas in the follow-up survey). By contrast, four in five described their health as very good or good (79% in both areas). There were no significant differences between the two types of area.

There were no changes between the two waves of the survey in delivered to areas. In not delivered to areas, there was a decrease in the proportion that said their health was ‘good’, from 47% at the baseline to 40% in the follow-up survey.

Table 10.12: Health in general

Health in general	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Very good	34%	39%	31%	33%
Good	47% (A1)	40%	50%	46%
Fair	16%	17%	14%	15%
Bad	3%	2%	4%	4%
Very bad	1%	1%	1%	1%
Refused	*%	*%	*%	1%
Net: Good	80%	79%	81%	79%
Net: Bad	3%	3%	4%	5%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

Both areas saw an increase in the proportion that reported having a long-term physical or mental health condition or illness.

Although only a very small proportion of residents described their health as bad or very bad, more than a quarter reported having a long-term physical or mental health condition or illness at the follow-up survey (26% in not delivered to and 28% in delivered to areas). There were no differences between the two areas.

In delivered to areas, there was an increase in the proportion that reported having a long-term physical or mental health condition or illness, from 21% at the baseline to 28% in the follow-up survey.

Similarly, in not delivered to areas there was also an increase in the proportion that reported having a long-term physical or mental health condition or illness, from 21% at the baseline to 26% in the follow-up survey.

Table 10.13: Physical or mental health conditions or illnesses lasting or expected to last for 12 months or more

Physical or mental health conditions or illnesses lasting or expected to last for 12 months or more	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Yes	21%	26% (A)	21%	28% (B)
No	78%	73%	79% (B1)	70%
Refused	1%	1%	1%	2%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

Fitness activity

Frequent fitness activity appeared to fall slightly in both areas.

In the follow-up survey, similar proportions of residents reported that they completed a physical activity[11] frequently - at least twice a week (65% in not delivered to areas, 70% in delivered to areas). In both areas, 26% stated they did this every day.

In delivered to areas, there was a decrease in the proportion of residents who said they completed a physical activity most days but not every day, from 23% at the baseline to 17% in the follow-up survey. There were increases in the proportions that said they completed a physical activity two to three times a week (from 20% at the baseline to 28% in the follow-up survey); and once a week (from 6% in the baseline survey to 14% in the follow-up survey).

In not delivered to areas, there was a decrease in the proportion of residents who said they completed a physical activity less than once a month, from 8% at the baseline to 4% in the follow-up survey. There was an increase in the proportion that said they never completed a physical activity, from 8% in the baseline survey to 14% in the follow-up survey.

Table 10.14: Fitness activity in a typical week

Fitness activity in a typical week	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Every day	31%	26%	30%	26%
Most days but not every day	16%	15%	23% (A/B1)	17%
2 to 3 times a week	24% (B)	25%	20%	28% (B)
Once a week	9% (B)	12%	6%	14% (B)
At least once a fortnight	1%	2%	1%	1%
At least once a month	2%	1%	1%	*%
Less often	8% (A1/B)	4%	4%	3%
Never	8%	14% (A)	13% (A)	10%
Don’t know/can’t remember	1%	1%	1%	1%
Net: Frequently	71%	65%	73%	70%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (833), Delivered to (851), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (421), Delivered to (378), 20/11/2023 – 17/03/2024
** denotes under 1%*

[11] Defined as an activity that raised the breathing rate for a time period of at least 30 minutes

B: Local area

Length of residence

At the time of the follow-up interview, the majority of residents had lived at their current address for over five years (84% in not delivered to areas, 85% in delivered to areas). This included 55% in not delivered to areas and 57% in delivered to areas who had lived there for over 10 years. There were no differences between the two areas.

Table 10.15: Length of residence

Length of residence	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
1-2 years	15% (A1)	3%	15% (B1)	4%
3-5 years	18%	16%	17%	15%
5-10 years	28%	29%	26%	28%
Over 10 years	46%	55% (A)	49%	57% (B)
Don't know	*%	1%	1%	1%
Net: Over 5 years	74%	84%	75%	84%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Local area in the past 12 months

In not delivered to areas, there was a decrease in the proportion that said their area had got better as a place to live. There were no changes in delivered to areas.

A small proportion of residents said they had not lived in the area long enough to be able to say if the local area had changed in the past 12 months (2% in each type of area) while less than 1% in both areas answered 'don't know' (the table below excludes these respondents).

Around one in ten residents (7% in not delivered to areas, 11% in delivered to areas) held the view that their area had got better as a place to live over the past 12 months. A similar proportion (14% in not delivered to areas, 12% in delivered to areas) felt the area had got worse. However, most felt that their local area had not changed much (80% in not delivered to areas, 77% in delivered to areas). There were no differences between the two areas.

In delivered to areas, there were no changes from the baseline to the follow-up survey.

In not delivered to areas, there was a decrease in the proportion that said their area had got better as a place to live, from 11% at the baseline to 7% in the follow-up survey.

The Community Life Survey[12] asks residents to consider how their local area has changed over the past 2 years. The 2020/21 survey found that 16% of adults thought their area had got better, 22% rated it as worse and the remaining 63% felt it had not changed.

Table 10.16: Local area in the past 12 months

Local area in the past 12 months	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Got better as a place to live	11% (A1)	7%	9%	11%
Got worse as a place to live	10%	14%	12%	12%
Not changed much (hasn't got better or worse)	79%	80%	79%	77%

Source: Household survey of adults aged 18+, excluding don't knows and residents stating they have not lived in the area long enough

Baseline: Not delivered to (879), Delivered to (862), 8/11/2021 – 10/01/2022

Follow-up: Not delivered to (440), Delivered to (380), 20/11/2023 – 17/03/2024

** denotes under 1%*

[12] Community Life Survey, April 2020 to March 2021. Adults 16+ in Great Britain, online and telephone, sample 9,964.

C: Contact procedures

All selected addresses were sent an advance letter containing the following information:

- A brief description of the survey and who was conducting the research (branded as being from Ipsos on behalf of the DSIT)
- What was involved if residents chose to take part
- An explanation that participants would receive a £10 shopping voucher
- Information on Building Digital UK and DSIT web pages and links to the Privacy Notice
- Information about how to contact Ipsos in case of any queries (email, freephone number and FAQ portal)

D: Socio-demographic profile of unweighted sample

The following tables summarise the socio-demographic profile of participants in not delivered to and delivered to areas before weights were applied.

Gender

Table 10.17: Gender (unweighted %s)

Gender	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Male	55%	56%	56%	60%
Female	45%	44%	44%	40%
In another way	0%	0%	0%	0%
Prefer not to answer	*%	0%	0%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Age

Table 10.18: Age (unweighted %s)

Age	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
18-24	1%	1%	3% (A)	3% (A1)
25-34	8% (A1)	5%	7%	5%
35-44	16%	13%	16%	13%
45-54	20%	18%	18%	16%
55-64	24%	27%	25%	22%
65-74	20%	22%	19%	26% (B)
75+	10%	14% (A)	13% (A)	14%
Refused	0%	0%	*%	0%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Size of household and household composition (number of adults, presence of children)

Table 10.19: Size of household and household composition (unweighted %s)

Size of household and household composition: average size	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Single person household	17%	18%	19%	16%
2 per household	44%	48%	47%	50%
3+ per household	39% (B)	34%	34%	34%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Table 10.20: Size of household and household composition: number of adults (unweighted %s)

Size of household and household composition: number of adults	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Single person household	4% (B)	2%	2%	*%
2 per household	69%	75%	78% (A)	79%
3+ per household	27% (B)	24%	21%	21%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Table 10.21: Size of household and household composition: presence of children (unweighted %s)

Size of household and household composition: presence of children	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
No children	71%	76%	73%	74%
Single child	13%	10%	11%	12%
Two children per household	12%	11%	13%	11%
3+ children per household	4%	3%	3%	3%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Occupation status

Table 10.22: Occupation status (unweighted %s)

Occupation status	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Have paid job - full-time (30+ hours per week)	44% (A1)	38%	42% (B1)	36%
Have paid job - part-time (8-29 hours per week)	7%	7%	6%	6%
Have paid job - part-time (Under 8 hours per week)	*%	1%	1%	1%
Not in paid work - full-time housework and/or caring	2%	1%	2%	1%
Self-employed (full time)	9%	8%	8%	9%
Self-employed (part time)	3% (B)	3%	1%	2%
Studying	1%	*%	1%	1%
Unemployed and seeking work	1%	2%	1%	*%
Retired	29%	35% (A)	32%	40% (B)
Not in paid work because of long-term illness or disability	2%	3%	3%	2%
Not in paid work for other reason	2%	1%	2%	1%
Refused	0%	0%	*%	*%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Hours worked, commuting time, working from home

Table 10.23: Hours worked (unweighted %s)

Hours worked	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
16 hours or less	15%	14%	16%	17%
17-35 hours	21%	26% (B1)	22%	18%
36-40 hours	29%	25%	31%	32%
41 hours or more	24% (B)	22%	19%	21%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Table 10.24: Commuting time (unweighted %s)

Commuting time	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
0 hours	41%	45%	36%	37%
1-3 hours	36% (A1)	29%	40% (B1)	30%
4-6 hours	12%	15%	14%	19%
7-9 hours	4%	3%	3%	4%
10 hours or more	6%	8%	7%	9%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Educational attainment

Table 10.25: Educational attainment (unweighted %s)

Educational attainment	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
GCSE/O-Level/CSE	14%	13%	12%	12%
Vocational qualifications (=NVQ1+2)	8%	8%	8%	7%
A-Level or equivalent (=NVQ3)	19%	18%	18%	21%
Bachelor Degree or equivalent (=NVQ4)	29%	27%	28%	26%
Masters/PhD or equivalent	14%	13%	14%	15%
Other	6%	8%	6%	9%
No formal qualifications	10%	11%	14% (A/B1)	9%
Still studying	*%	*%	*%	0%
Don’t know	1%	2%	2%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389) 20/11/2023 – 17/03/2024
** denotes under 1%*

Social grade

Table 10.26: Social grade (unweighted %s)

Social grade	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
A	7%	15% (A)	11% (A)	15%
B	24%	30% (A)	28% (A)	26%
C1	34%	31%	34%	33%
C2	21% (A1/B)	12%	15%	14%
D	7%	5%	7%	7%
E	6%	6%	4%	4%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Household income

Table 10.27: Household income (unweighted %s)

Household income	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Up to £86 per week | Up to £374 per month | Up to £4,499 per year	1%	1%	1%	*%
£87 - £182 per week | £375 - £791 per month | £4,500 to £9,499 per year	2%	2%	2%	2%
£183 - £278 per week | £792 - £1,208 per month | £9,500 - £14,499 per year	5%	5%	4%	3%
£279 - £336 per week | £1,209 - £1,458 per month | £14,500 - £17,499 per year	5%	6%	4%	4%
£337 - £576 per week | £1,459 - £2,499 per month | £17,500 - £29,999 per year	13% (B)	14%	9%	12%
£577 - £961 per week | £2,500 - £4,166 per month | £30,000 - £49,999 per year	16%	16%	15%	19%
£962 or more per week | £4,167 or more per month | £50,000 or more per year	29%	36% (A)	27%	40% (B)
Don’t know	5%	4%	6%	5%
Prefer not to say	24% (A1)	16%	34% (A/B1)	15%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (89), 20/11/2023 – 17/03/2024
** denotes under 1%*

Housing tenure

Table 10.28: Housing tenure (unweighted %s)

Housing tenure	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Own it outright	51%	58% (A)	52%	54%
Buying it with the help of a mortgage or loan	25%	24%	27%	31% (A1)
Part own and part rent (shared ownership)	*%d	*%	0%	*%
Rent it from a private landlord	12% (A1)	7%	11% (B1)	6%
Rent it from a local council	5%	5%	6%	4%
Rent it from a housing association	2% (B)	2%	1%	2% (B)
Live here rent-free (including rent-free in relative's/friend's property but excluding squatters)	2%	2%	1%	3%
Occupy it in some other way	2%	1%	1%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Health and disability

Table 10.29: Health (unweighted %s)

Health	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Very good	33%	37%	30%	32%
Good	46%	40%	50%	46%
Fair	18%	18%	15%	16%
Bad	3%	3%	4%	4%
Very bad	1%	2%	1%	1%
Refused	*%	*%	*%	1%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

Table 10.30: Disability (unweighted %s)

Disability	Baseline Not delivered to (A)	Follow-up Not delivered to (A1)	Baseline Delivered to (B)	Follow-up Delivered to (B1)
Yes	23%	29% (A)	22%	29% (B)
No	76% (A1)	70%	77% (B1)	69%
Refused	1%	1%	1%	2%

Source: Household survey of adults aged 18+
Baseline: Not delivered to (922), Delivered to (900), 8/11/2021 – 10/01/2022
Follow-up: Not delivered to (450), Delivered to (389), 20/11/2023 – 17/03/2024
** denotes under 1%*

E: Analytical framework to assess the impact of the Superfast Broadband Programme

Analytical framework

In order to estimate the impact of the Superfast Broadband Programme on a range of social outcomes, an analytical technique utilising the delivered to and not delivered to groups and the temporal differences in the waves of the research has been used. This approach is a Difference in Differences approach. As the Superfast Broadband Programme has provided enhanced connectivity only in the delivered to areas, the analysis aims to explore the changes in the outcomes between the two groups while controlling for other factors which may influence the outcome metrics.

The analysis was limited to the sample of households that responded to both waves of the research, to minimise unobservable differences. The regression approach used has the following specification:

$$outcome_{i,t} = \beta_0 + \beta_1 t + \beta_1 d + \beta_1 dd + \boldsymbol{\beta x_i} + \epsilon_i$$

In this specification, the outcomes of interest for each household i ($outcome_{i,t}$) was determined by a dummy variable for the time, t (baseline taking the value of zero and follow-up taking the value of one), whether the household was in an area that was expected to receive Superfast Broadband Programme coverage (the delivered to areas), d (zero in not delivered to areas, and one in delivered to areas), and a difference in differences dummy variable, dd (taking a value of zero for all households for the baseline wave, zero in the follow-up survey for those not receiving subsidised coverage, and one for the follow-up survey for households in the delivered to areas). In addition to these, there was a vector of control variables, $\boldsymbol{x_i}$ capturing the characteristics of the households that could influence the outcomes observed (such as demographics, whether the household has the fastest speed available, frequency of use etc.)

The outcomes that were analysed were:

- Connection speed category;
- Actual connection speed (taken from the speed test data);
- Satisfaction and value for money of internet connection;
- Frequency of volunteering category;
- Commuting time;
- Working from home frequency; and
- Wellbeing indicators.

Two specifications of the model were used, depending on the type of outcome variable being analysed. For continuous numeric variables (for example connection speed, commuting time, working from home frequency and wellbeing indicators), a standard linear regression model was utilised. For the ordinal

outcome data (levels of satisfaction, speed categories and volunteering categories), an ordered logistic regression approach was used.

Three sets of analysis were undertaken for each outcome. These were:

- An initial regression analysis of the outcome, using demographic factors (e.g. age, gender, education, health etc.) as control variables alongside the time period, area and difference in difference variable.
- A further regression analysis of each outcome, with added control variables for the frequency of internet use, whether the household had the fastest connection speed available and whether the household had upgraded their internet connection.
- A regression analysis, following a Propensity Score Matching (PSM) exercise to make the two groups more comparable. The PSM approach used demographic data to enhance the comparability between the two groups, using age, gender, years at address, size of household, employment status, education level, health and disability status. Following the matching exercise, the data from matched households was used for a further regression analysis, using the time period, area, difference in difference variables and whether the household had the fastest connection speed available and whether the household had upgraded their internet connection as control variables.

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