

CAIRNGORMS NATIONAL PARK

DIGITAL CONNECTIVITY SURVEY - SUMMARY OF KEY FINDINGS

An online survey was conducted between November 2011 and January 2012 to assess current digital connectivity provision across the Cairngorms National Park.

The full survey results are available online at <http://www.cairngorms.co.uk/live-work/digital-connectivity>. Key findings from the survey are as follows:

General

- 634 responses were received, with 201 from businesses.
- 64% of respondents use a residential type of broadband
- Of all respondents, 6.1% do not have broadband (because they don't need it or find it too expensive), or still use dialup. 15.3% use 3G mobile technology to access the internet

Business

- 36% of respondents to the survey say that they use a business type broadband service
- 57% of business respondents claimed that their current broadband facilities restricts their business in one way or another, whereas 55% of all respondents find that it generally restricts the way they use the internet.

Education

- 47% of respondents (including businesses) say that they use their broadband connection for education, such as undertaking research for assignments, participating in online learning or tutorials or a distance learning course.
- Only 51% of respondents find that their current broadband provision provides them with their requirements for education.

Mobile Communications

- 20% of all respondents said they have no mobile coverage at all in their home or business
- 39% of all respondents said they have a signal of only 1 or 2 bars (out of 5) in their premises (37% generally in the area).
- More than three quarters of respondents in the survey claimed that 3G coverage is either poor or non-existent. Half of all respondents claim they have no service at home or in their office. Only about 7.8% find that their service at home or in the office is good or very good and this drops to 6.7% for people who are using it generally within the Park.

Speed

- The average download speed given by 307 respondents is 3.46 Mbit/s, which is only 29% of the UK average (11.81 Mbit/s¹ for the UK, 9.79 Mbit/s worldwide).
- The average upload speed given by 300 respondents was 0.38 Mbit/s, which is only 20% of the UK average (1.95 Mbit/s for the UK and 3.60 Mbit/s worldwide).
- 39% of all respondents currently receive a service that does not meet BDUKs² planned 2015 universal service commitment of 2 Mbit/s. This is substantially more than the average figures for each of the local authorities in the Park (for example, 17.2% in Highland) and higher than in any local authority in the UK (Fermanagh is the highest in the UK at 33% whilst in Scotland the highest is 28% in Clackmannanshire)³.
- About half of all respondents have a service of about 3 Mbit/s.
- The acceptable range for a majority of people appears to be 4 Mbit/s or better, which currently only 44% of respondents in the Park can get.

Reliability

- Only 7% of the respondents find that their service is very reliable. 56% find that the speed varies, but the connection never drops. 32% claim that their service not only varies in speed, but also regularly drops out altogether. 4.5% report very unreliable services.

Pricing

- The average price residents currently pay in the Park appears to be slightly lower than the UK average. This could be because certain more expensive superfast services are not available. The survey indicates an even spread of fees that people pay, although a majority of people pay prices within the £15 to £35 bracket, the higher part of this bracket (£25 to £35) often includes telephone calls.

¹ Source: Net Index by Ookla (www.netindex.com). This information was correct at the time of compilation of this report, and increases on a daily basis. Ofcom have also conducted research and published their own report: Communications Infrastructure Report 2011 (<http://maps.ofcom.org.uk/broadband/index.html>). They quote an average synch speed of 7.6 Mbit/s for Scotland. However, this does not include superfast broadband and sync speed is different from actual download speed and therefore not 100% comparable with data from the survey.

² Broadband Delivery UK, the UK Government's delivery vehicle to stimulate private sector investment.

³ Source: Ofcom Communications Infrastructure Report 2011 (<http://maps.ofcom.org.uk/broadband/index.html>). The Ofcom data for this measure has been corrected to reflect actual download speeds (2.2 Mbit/s sync speed), so can be used as a comparison. Naturally this excludes superfast broadband connections.