



Impact of GM Connection Voucher Scheme





Summary

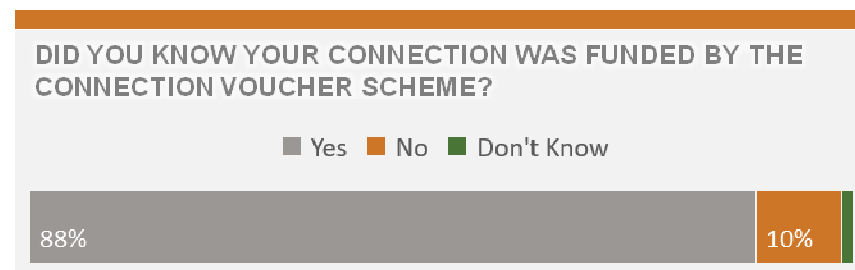
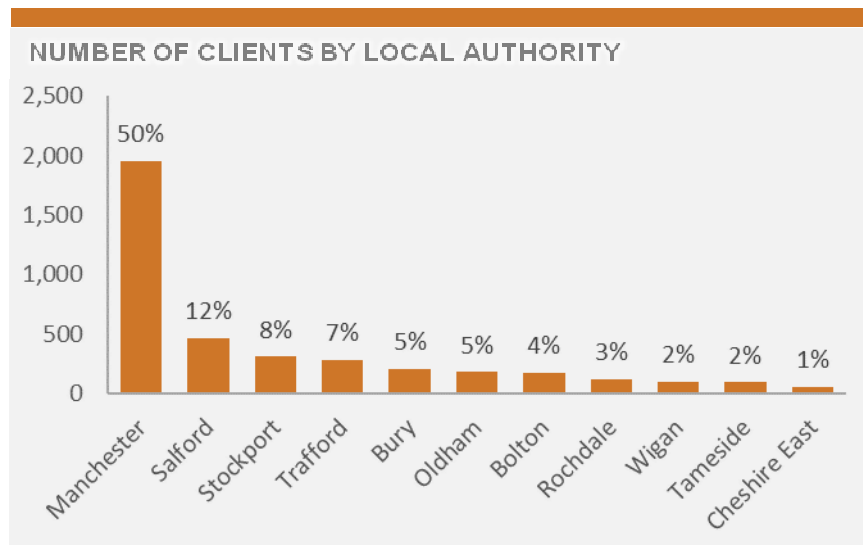
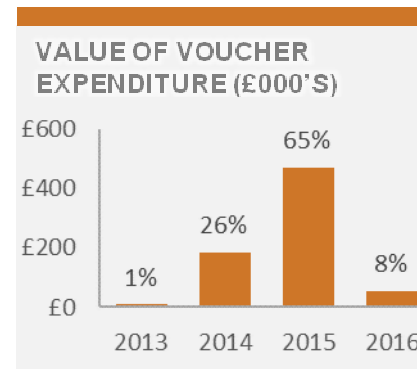
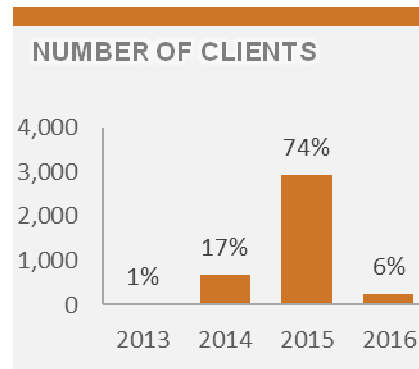


We estimate that the scheme has resulted in:



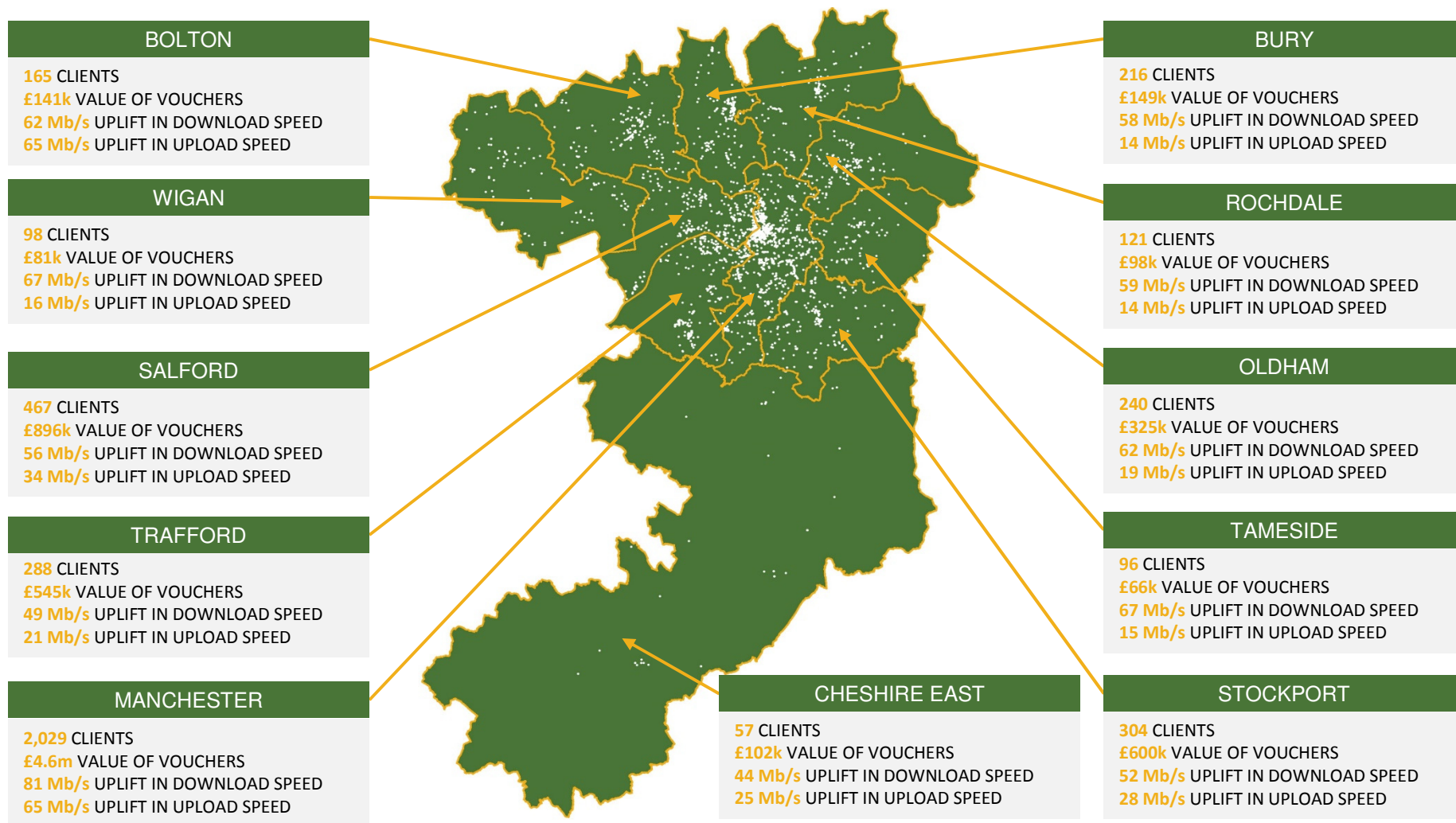


Slow Start, Picking Up Momentum





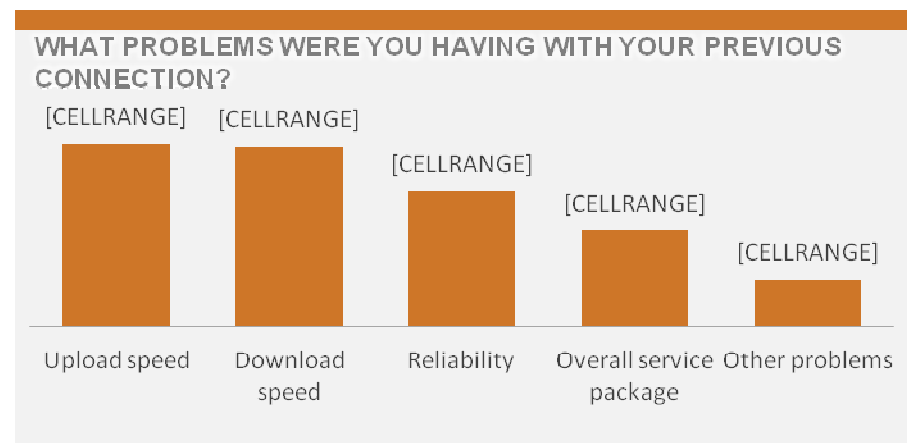
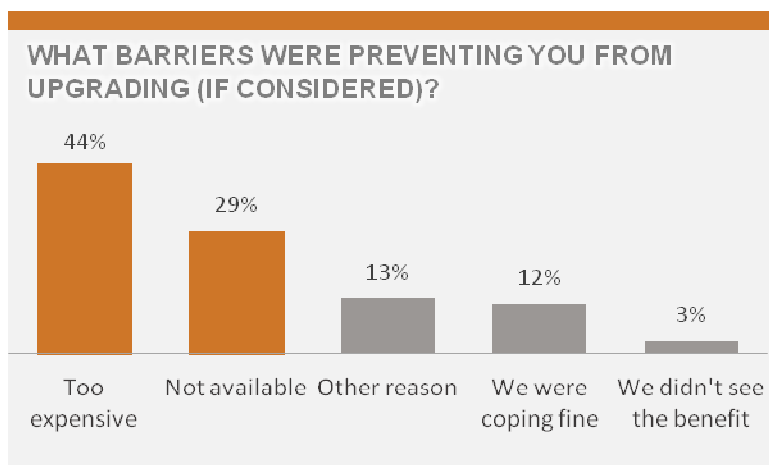
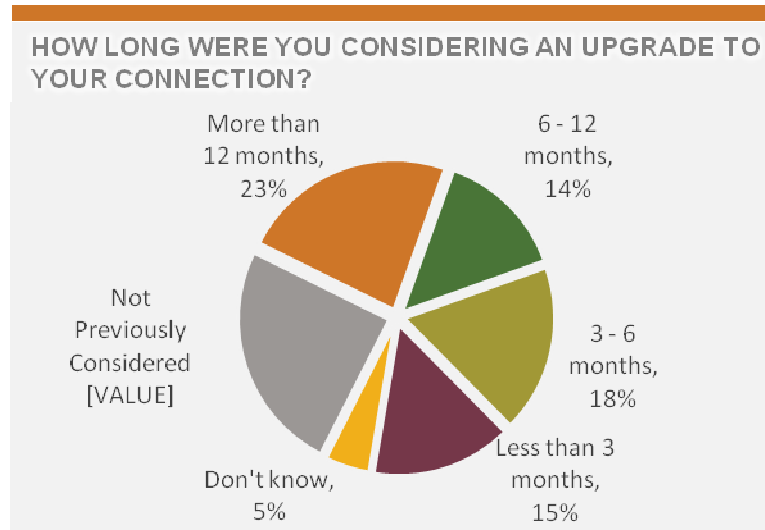
Geographic Profile of the Scheme



NB: Uplift speeds are averages of the district. The white dots on the map illustrate the distribution of the clients

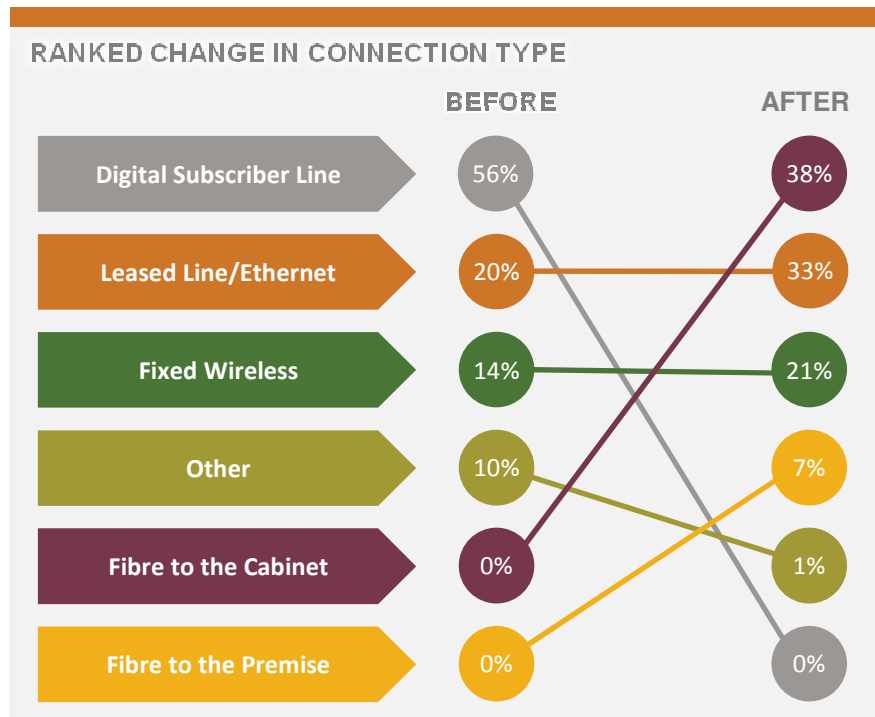


A Need for Speed & Tackling Costs Have Driven Uptake





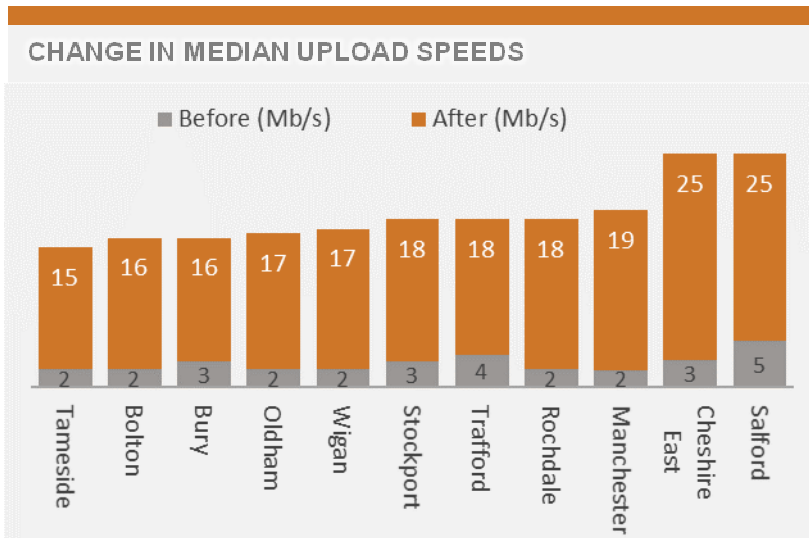
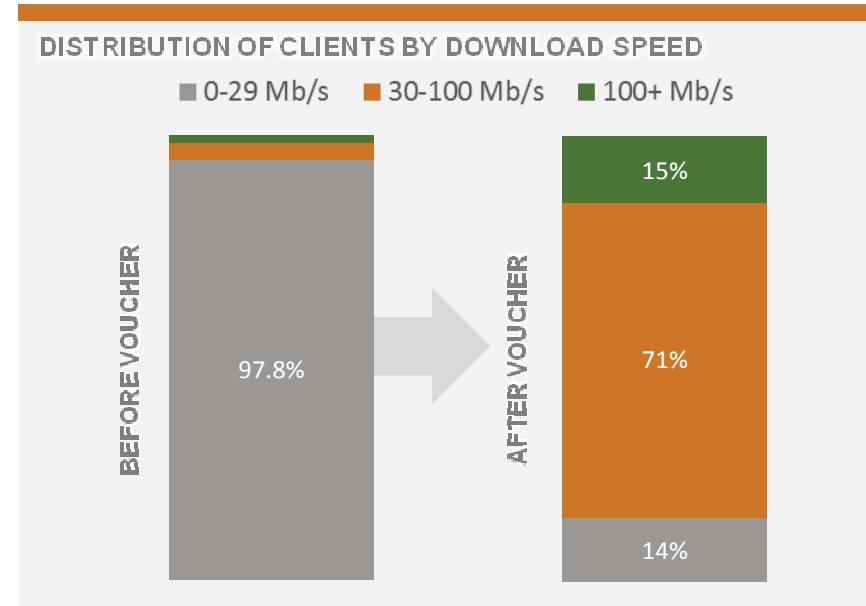
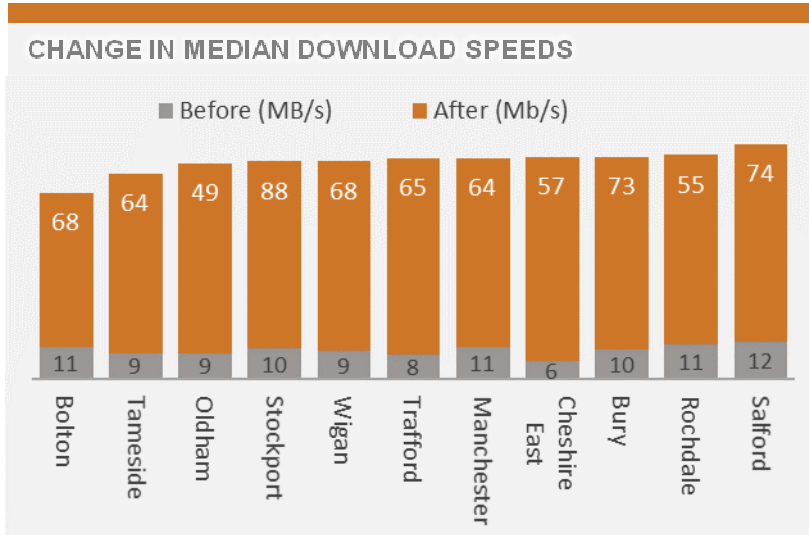
Fibre Has Been Replacing DSL



Provider Name	% of clients
Metronet	22%
BT	13%
Telecom Networks Ltd	9%
Virgin	8%
TalkTalk	7%
ITC	7%
Telappliant	4%
Maverick Connected Ltd	3%
6G Internet	3%
ITS Technology Group	3%
Total	79%



Significant Impact on Upload & Download Speeds



80% of surveyed clients were **satisfied** or **highly satisfied** with the speed of the new connection.

66 Mb/s
AVERAGE UPLIFT
IN DOWNLOAD
SPEED

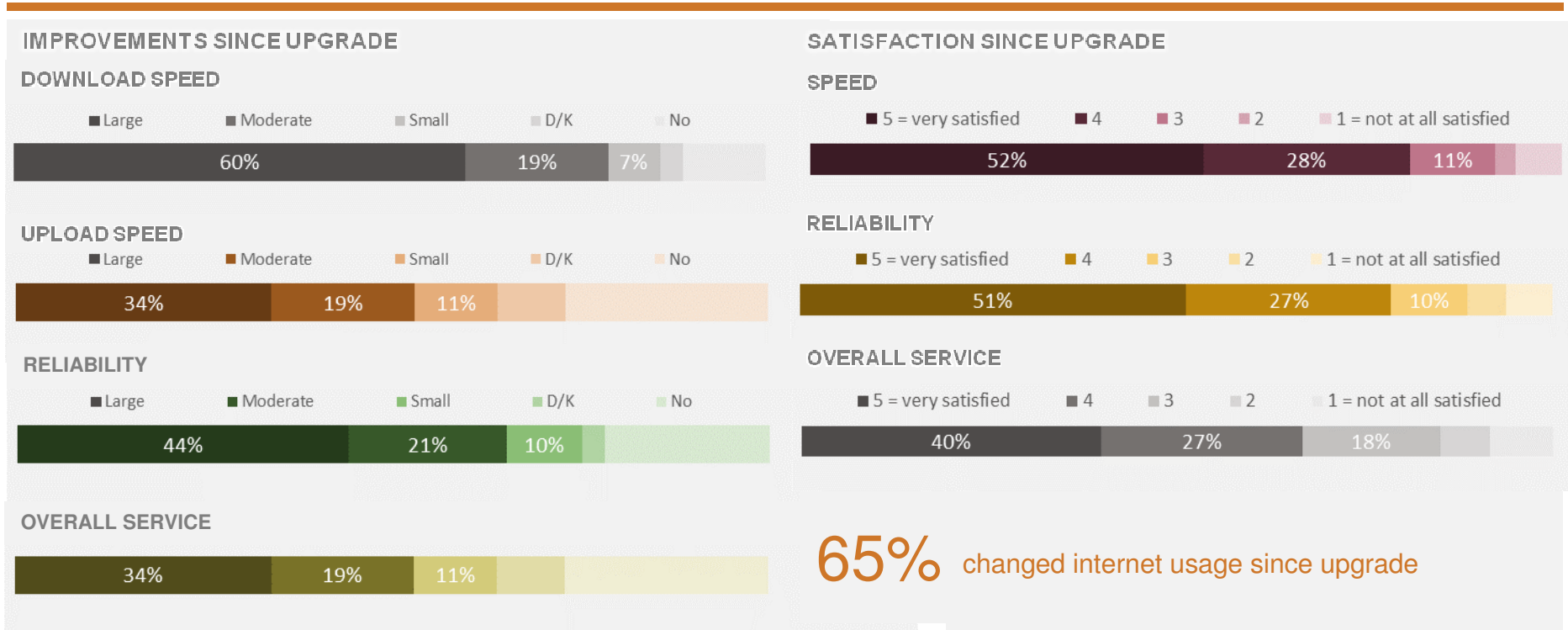
40 Mb/s
AVERAGE UPLIFT
IN UPLOAD SPEED

x11 faster average download speed

x16 faster average upload speeds

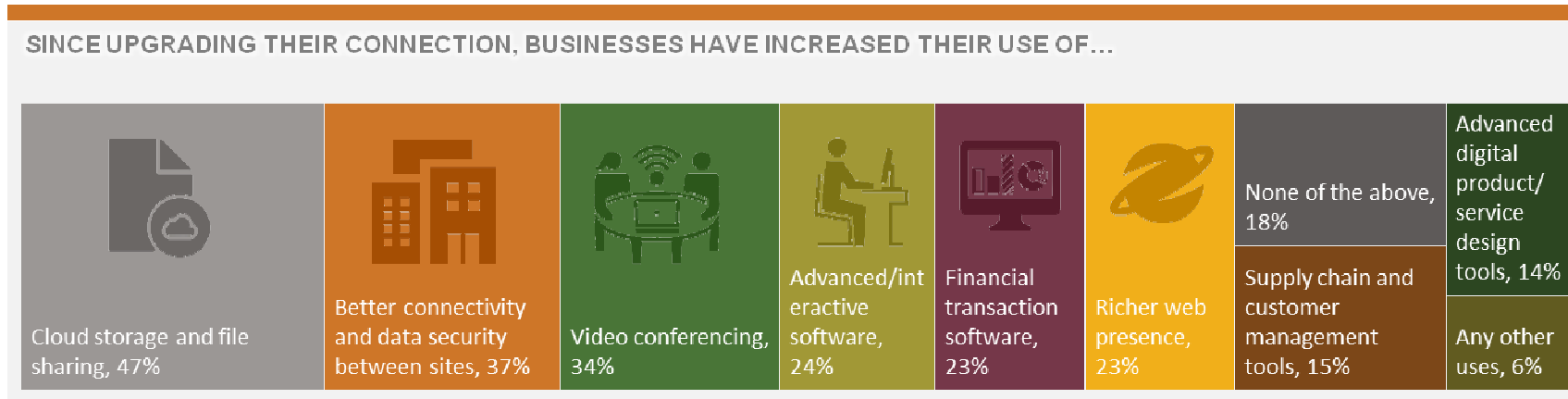


Improvements in Connectivity Have Been Broad-Based





Businesses Have Made Wide Use of Their Upgraded Connectivity



The higher speed and more reliable services have helped businesses change the way they operate.

Since upgrading their connection:

58% improved business efficiency

23% have enhanced data security

51% have shared larger files

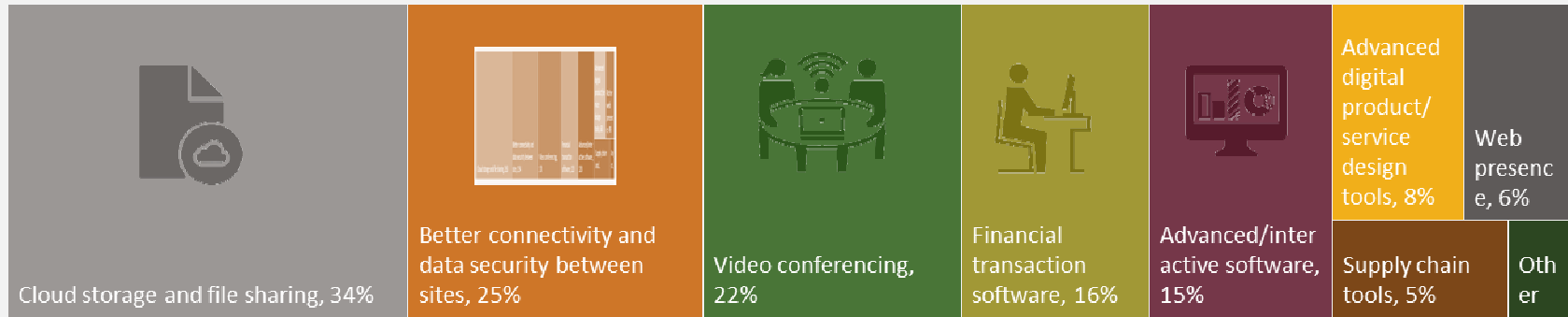
23% have been able to better process customer orders.

27% have improved their website



Increased Digital Dependence Has Changed How Businesses Operate

AFTER THE UPGRADE, BUSINESS ARE NOW MORE DEPENDENT ON...



33% invested in IT hardware and software

31% implemented new business processes

30% introduced more flexible working patterns

24% engaged in better networking

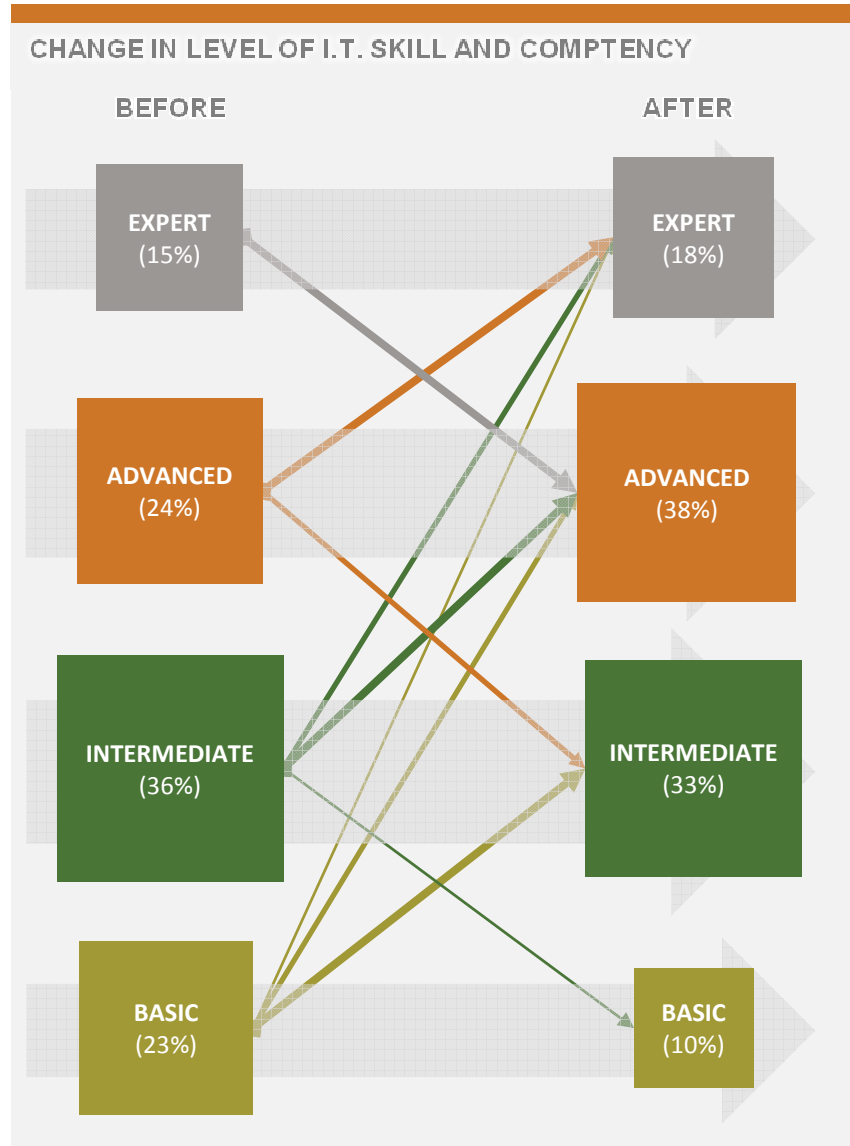
Other reported changes include



90% reported new broadband service was **extremely important** or **very important** in achieving these changes



Impacts of the Programme



agree or strongly agree

86% *“reliable broadband influences where businesses decide to base themselves.”*

50% *“I might have moved my business if faster broadband was not available in my areas.”*

93% *“faster broadband can make cities/locations more competitive.”*

94% *“fast and reliable broadband is good for a city’s image and reputation.”*



Changes to Business Performance

reported an increase in

25% employment

20% turnover

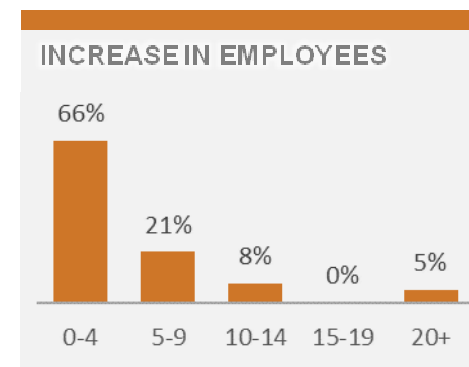
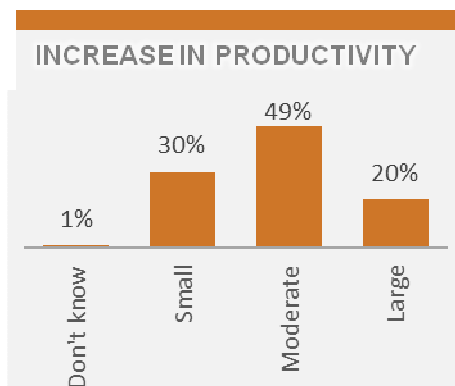
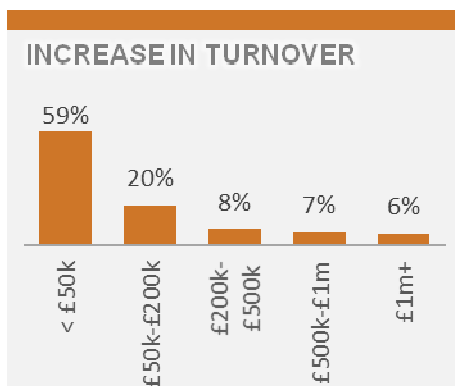
64% productivity

voucher played a **moderate**, a **large** or a **very large** role in

75% employment changes

77% turnover changes

87% productivity changes



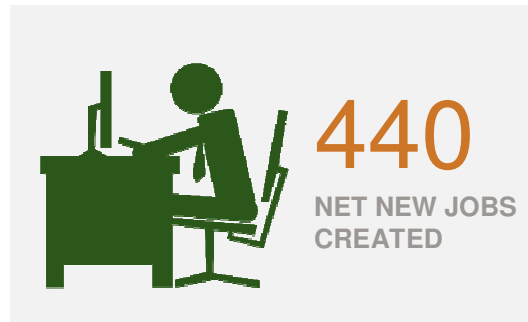


Economic Impacts

The Connection Vouchers investment of £8.5m has generated a range of economic impacts...



£201,860 Turnover per new job



£19,500 Cost per new job



£43,580 GVA per new job

For every £1 invested, the scheme has generated a return on investment



In the next three years, businesses expect to grow even further as a result of their upgraded connectivity and generate additional economic impacts