



2017 Clearwater County Broadband Demand Study Presentation of Results

November 28th, 2017

Banister
Research & Consulting Inc.



Project Background and Objectives

- In 2017, Clearwater County contracted Banister Research to conduct resident and business broadband demand surveys.
- The objective of the project was to provide Clearwater County Council insight into the perceptions and opinions of residents and businesses regarding the current state of the broadband network in the County, as well as the current state of the broadband network in the County and whether enhanced internet infrastructure investment is warranted.



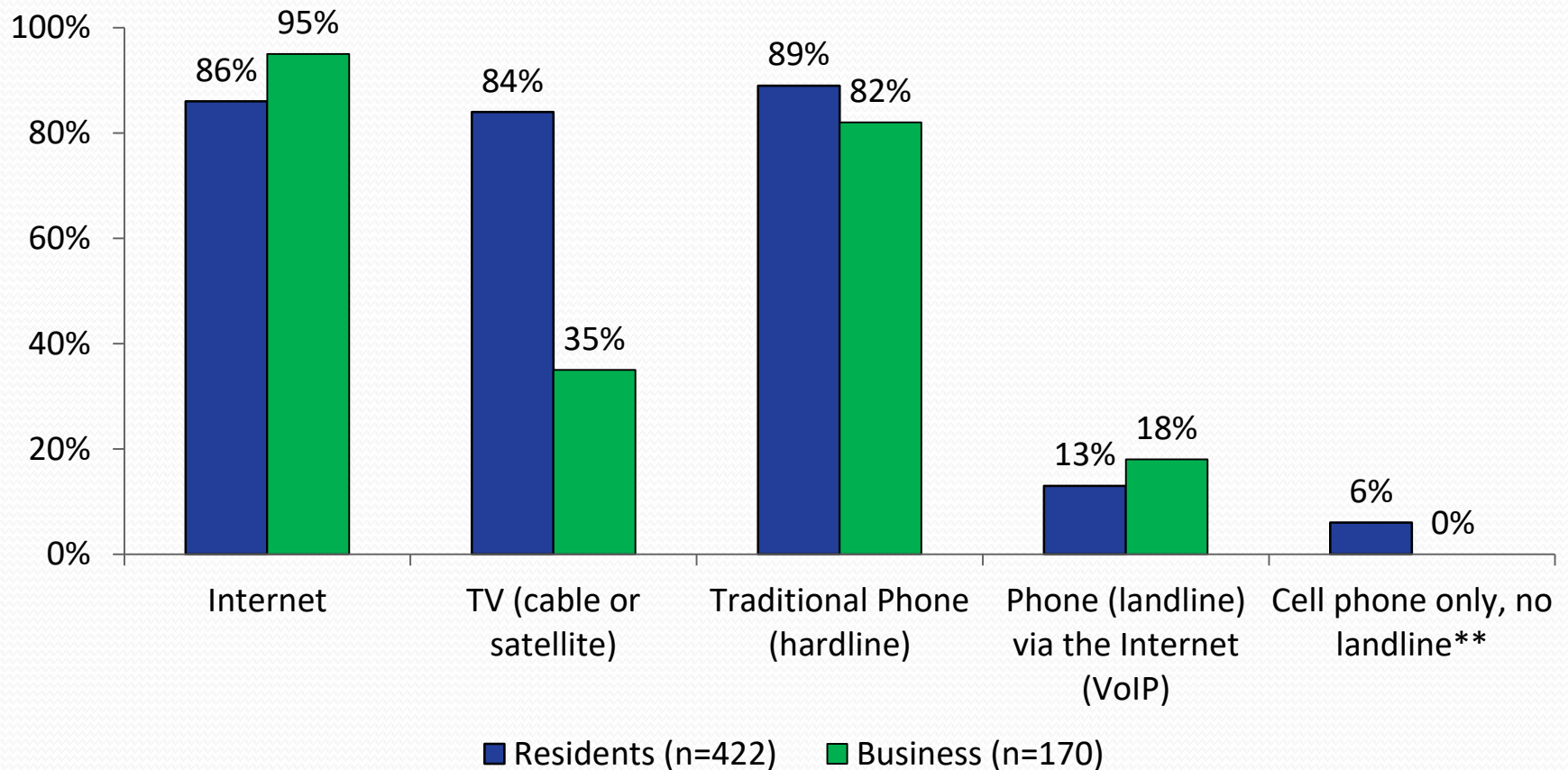
Methodology

- Telephone interviews were conducted from October 9th to October 29th, 2017 at the Banister Research Call Centre.
- As part of the resident component of the study, Banister Research completed a total of 380 telephone interviews with adult residents residing in Clearwater County. 42 additional hard copy surveys were received.
- As part of the business component of the study, Banister Research completed a total of 170 business interviews with businesses operating in Clearwater County.
- Results provide a margin of error no greater than $\pm 4.9\%$ at the 95% confidence level, or 19 times out of 20.



Current Subscriptions

Do you subscribe to any of the following services?*

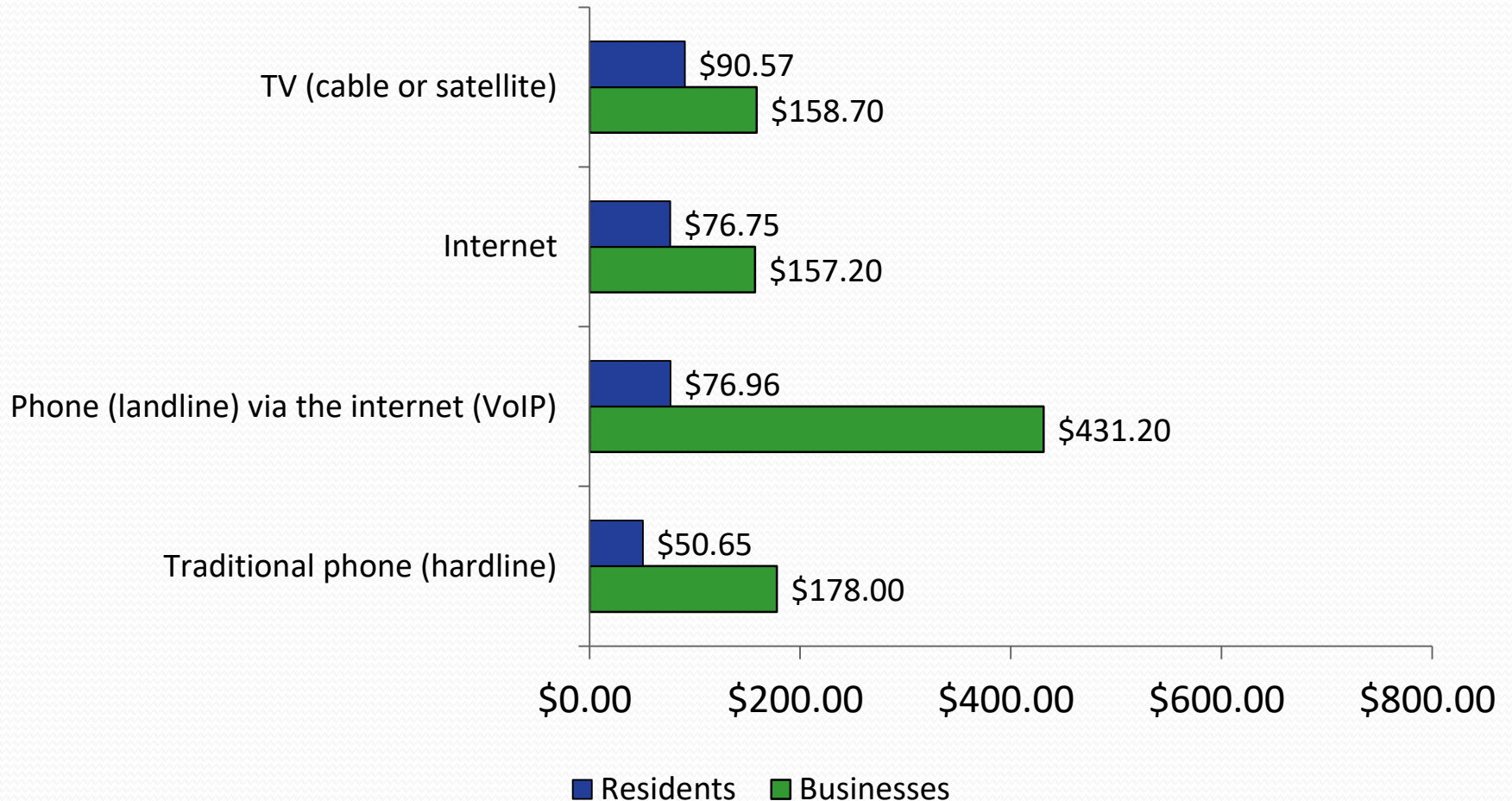


*Percent of respondents who subscribe to each service

**Businesses were not asked this question

Cost of Services (Summary)

How much do you pay (monthly) for your current services?*

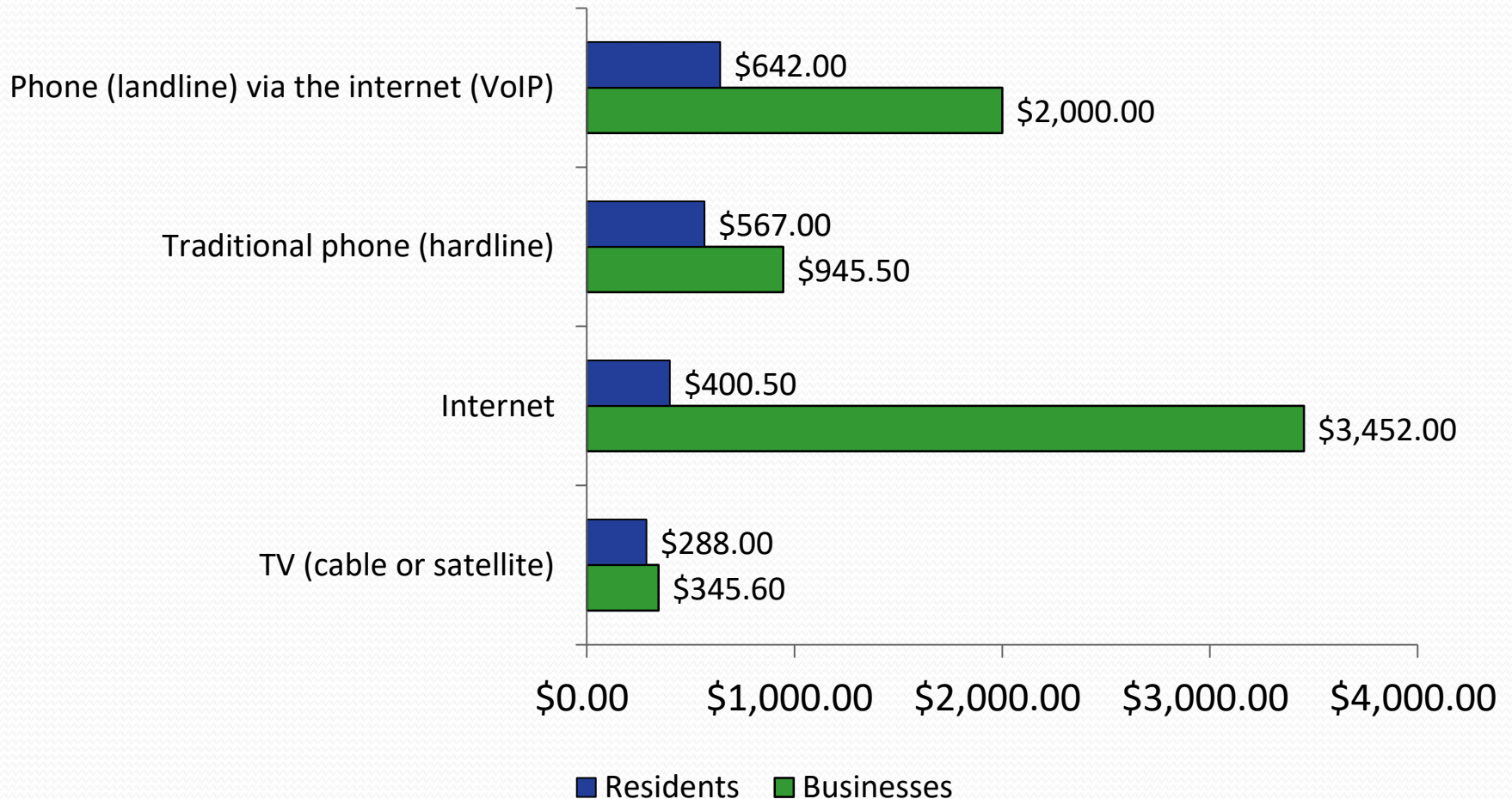


*Average monthly cost of service
Base: Respondents who subscribe to each



Cost of Additional Infrastructure (Summary)

How much have you spent on additional infrastructure for each service?*



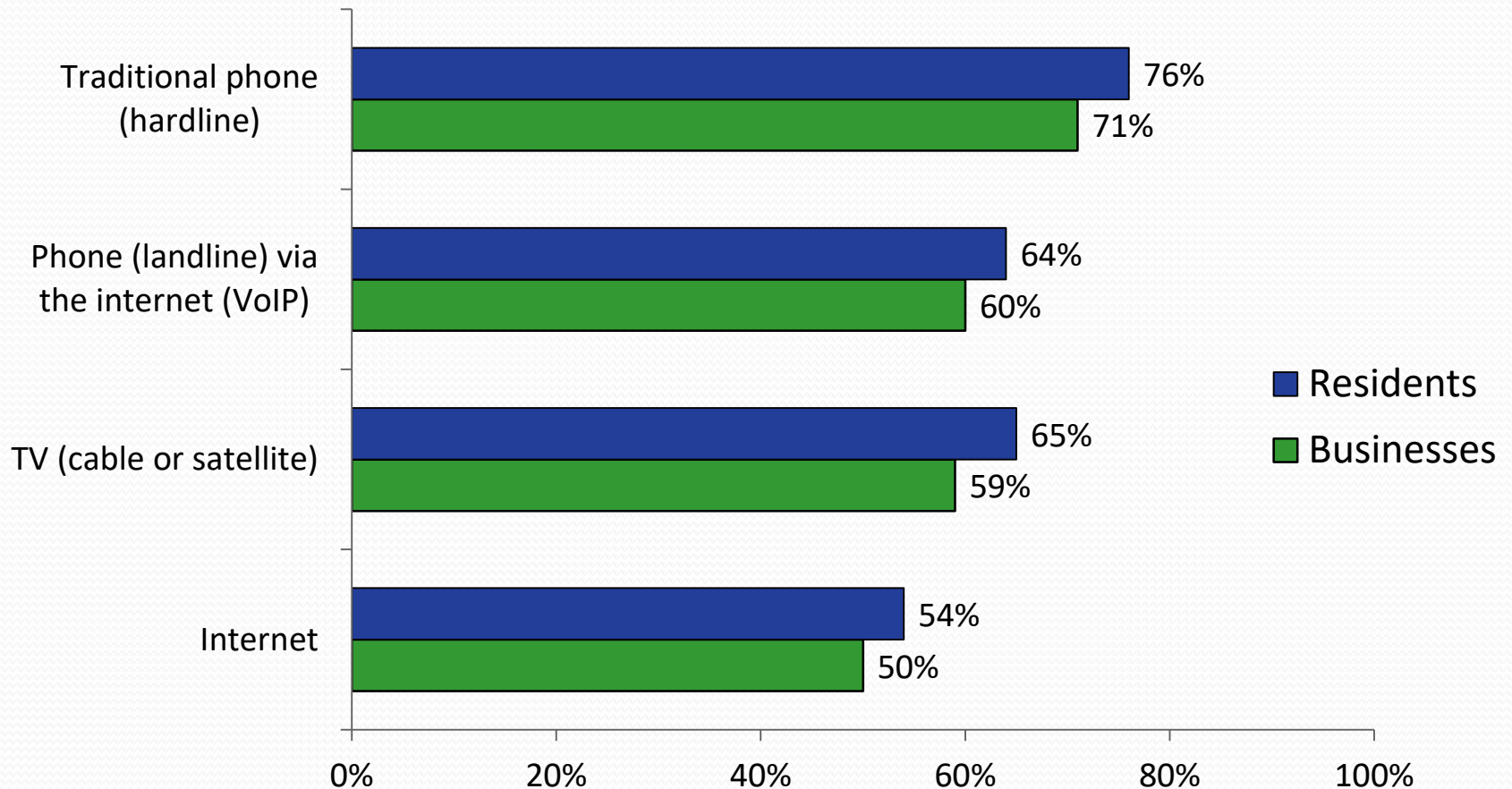
*Average investment in additional infrastructure

Base: Respondents who subscribe to each and invested in additional infrastructure



Satisfaction with Service Provider

How satisfied are you with your current service provider for...?*



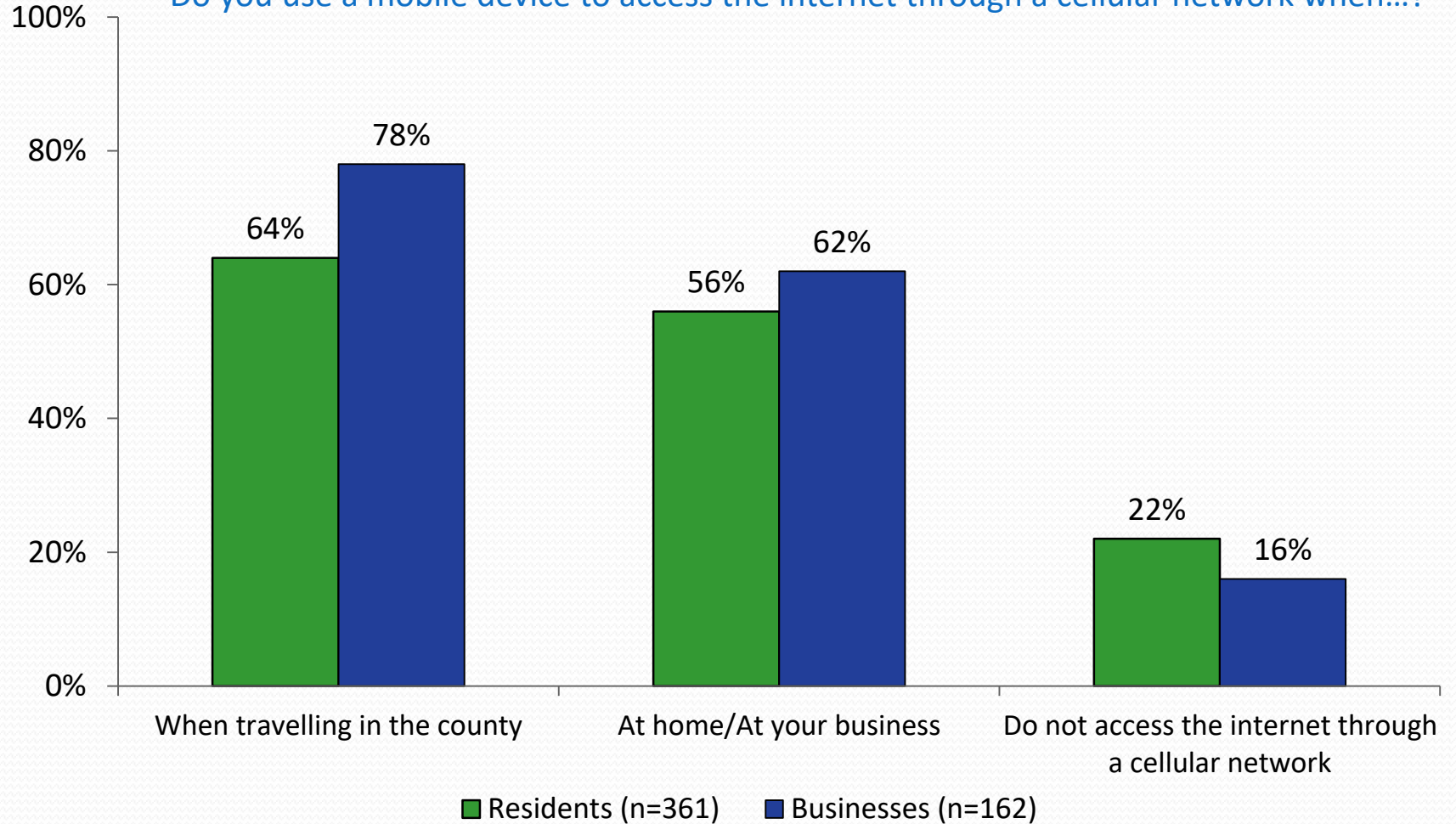
*Percent of respondents who were satisfied with each (ratings of 4 or 5 out of 5)

Base: Respondents who have a subscription for each



Cellular Network Usage

Do you use a mobile device to access the internet through a cellular network when...?

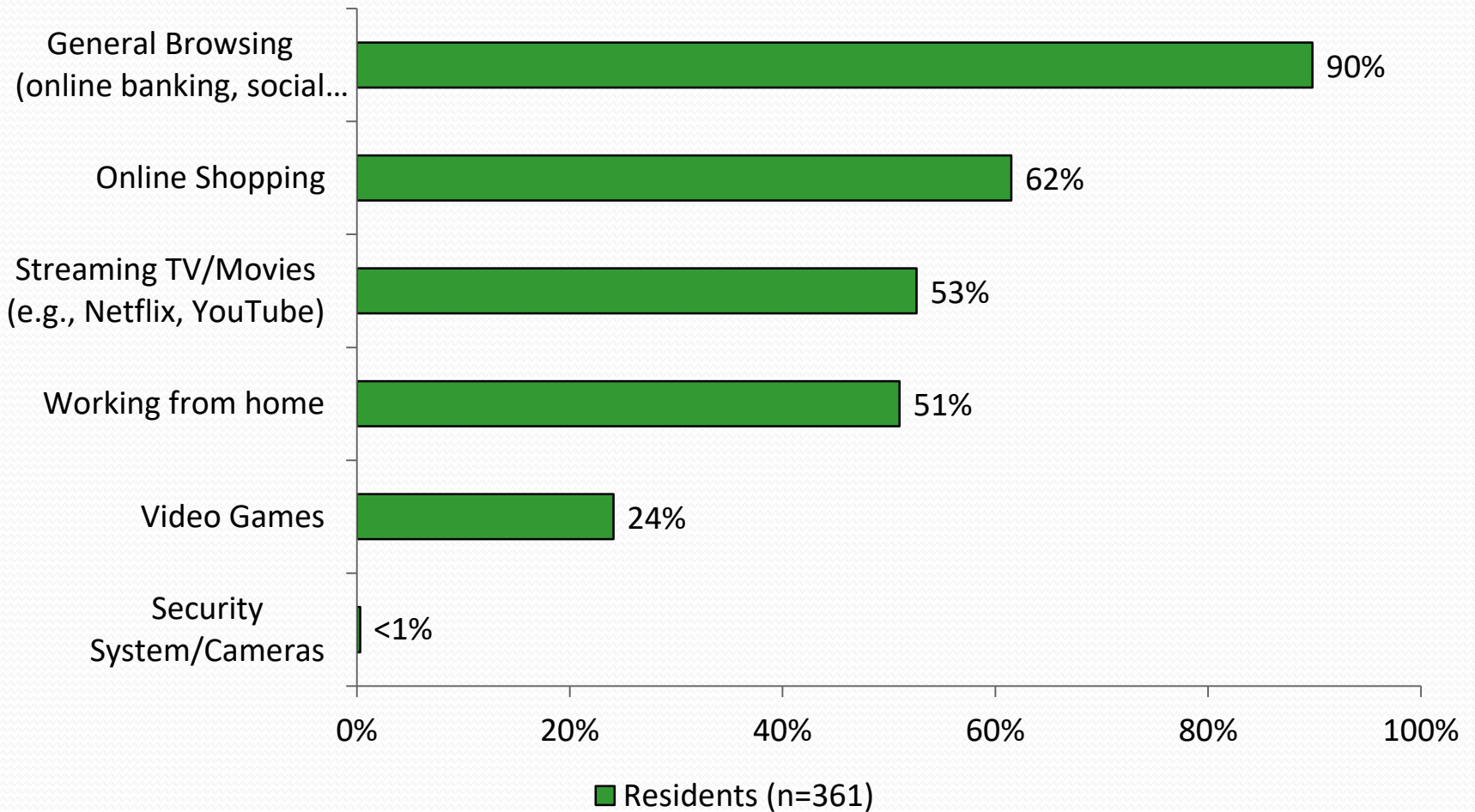


Base: Respondents who have an internet subscription



Home Internet Usage (Residents Only)

How is your home internet used?

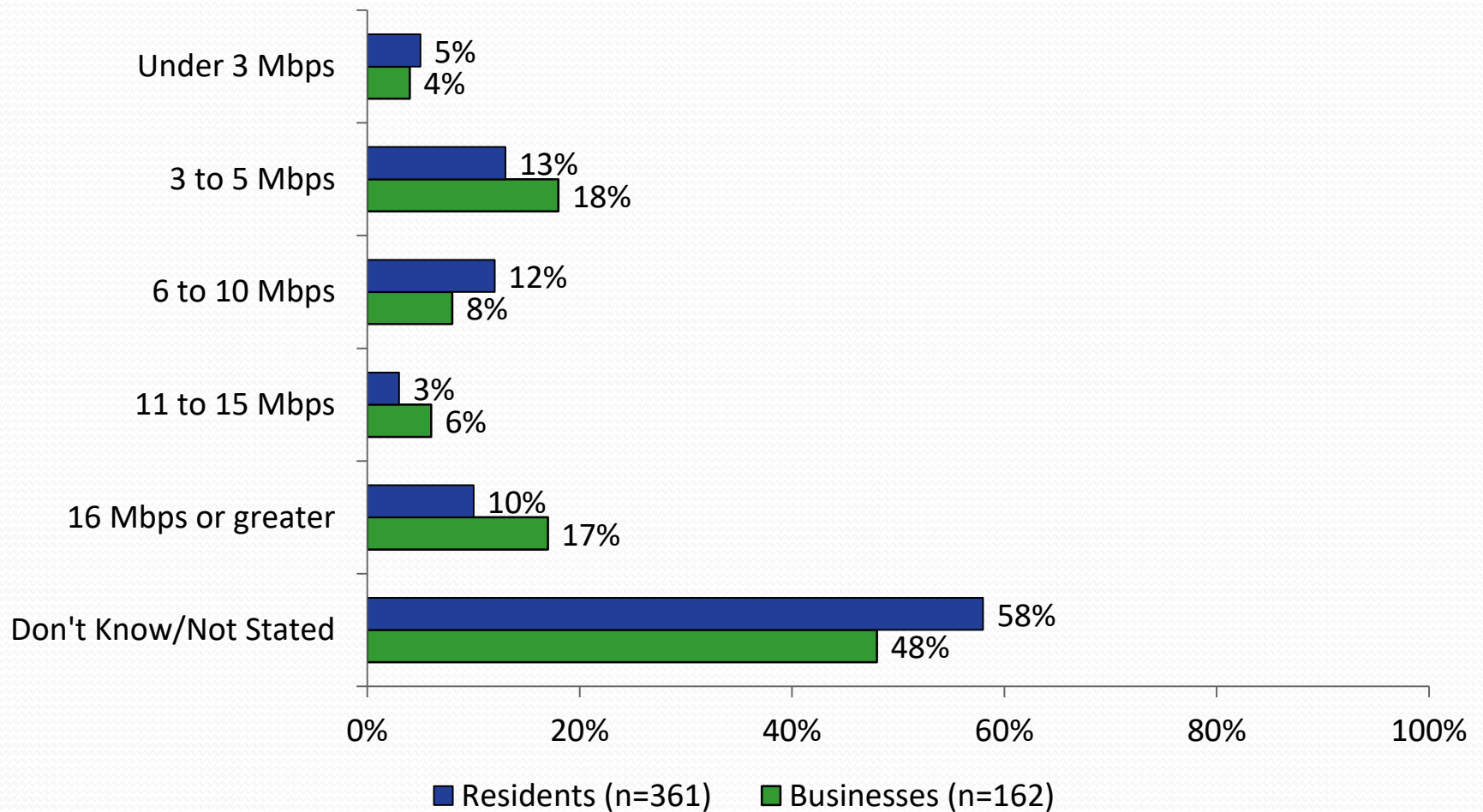


Base: Residents who have an internet subscription



Current Internet Speed

What is your current internet speed?

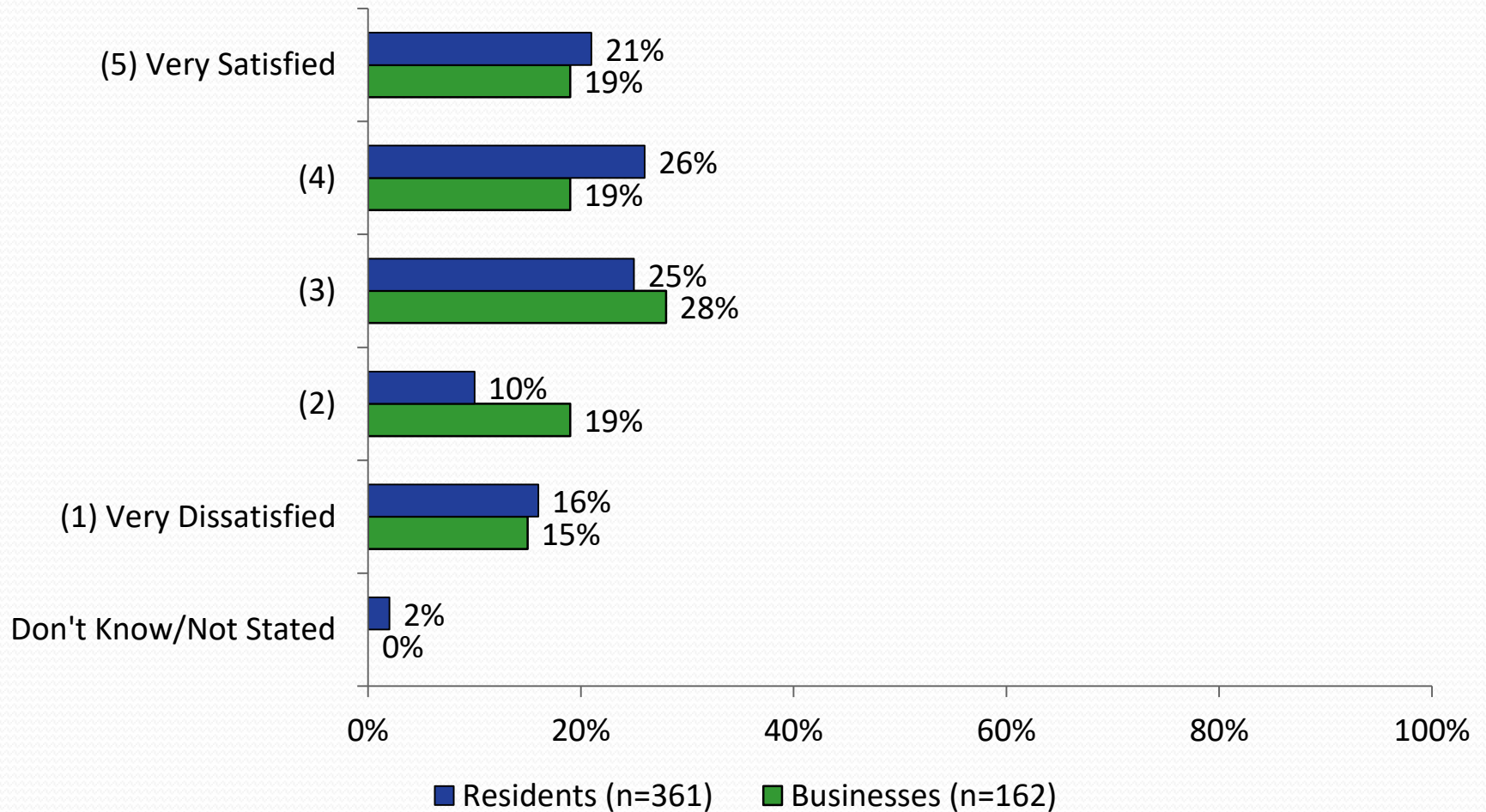


Base: Respondents who have an internet subscription



Satisfaction with Internet Speed

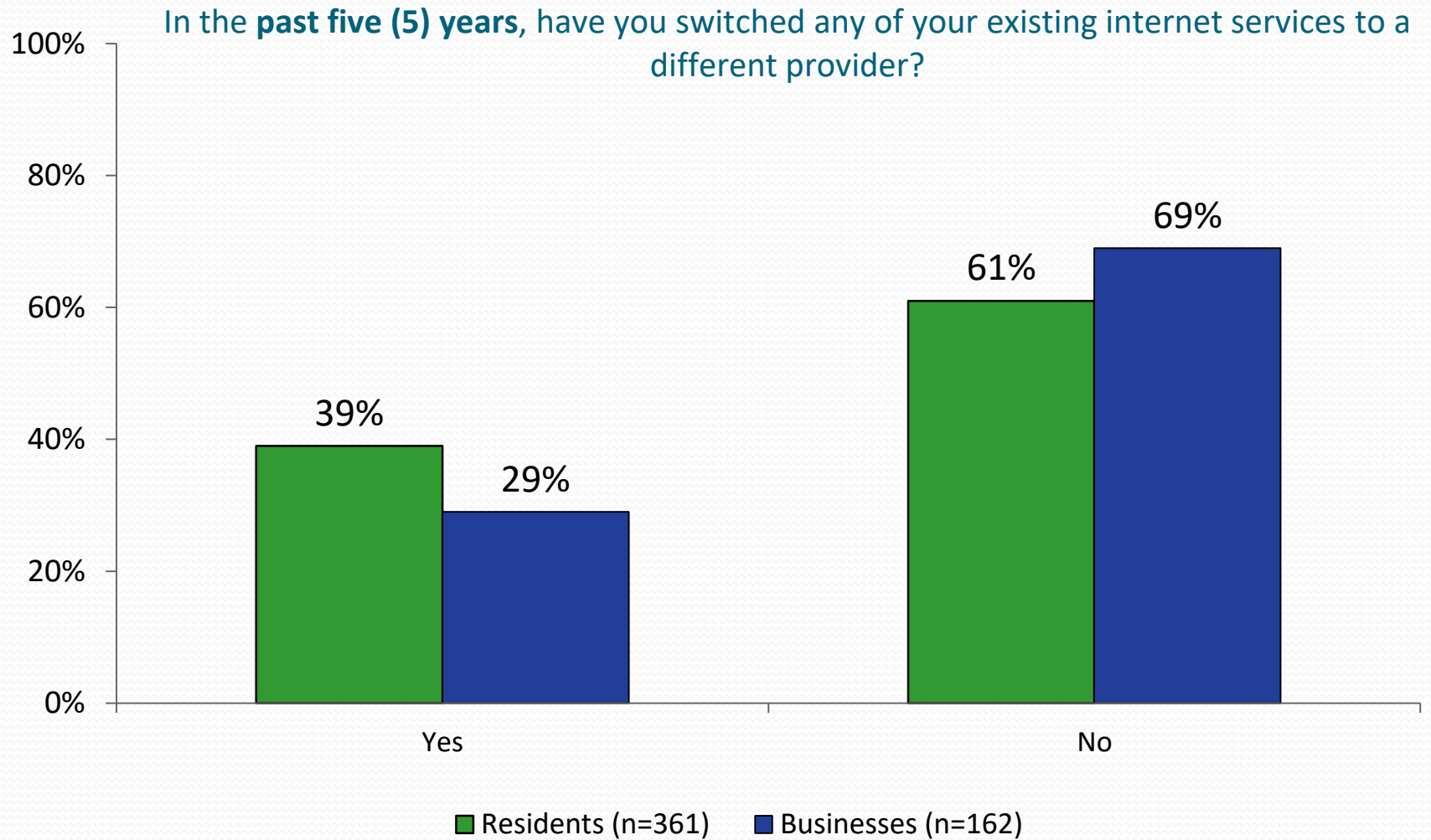
How satisfied are you with your current internet speeds?



Base: Respondents who have an internet subscription



Switching from Existing Internet Service Provider



Base: Respondents who have an internet subscription



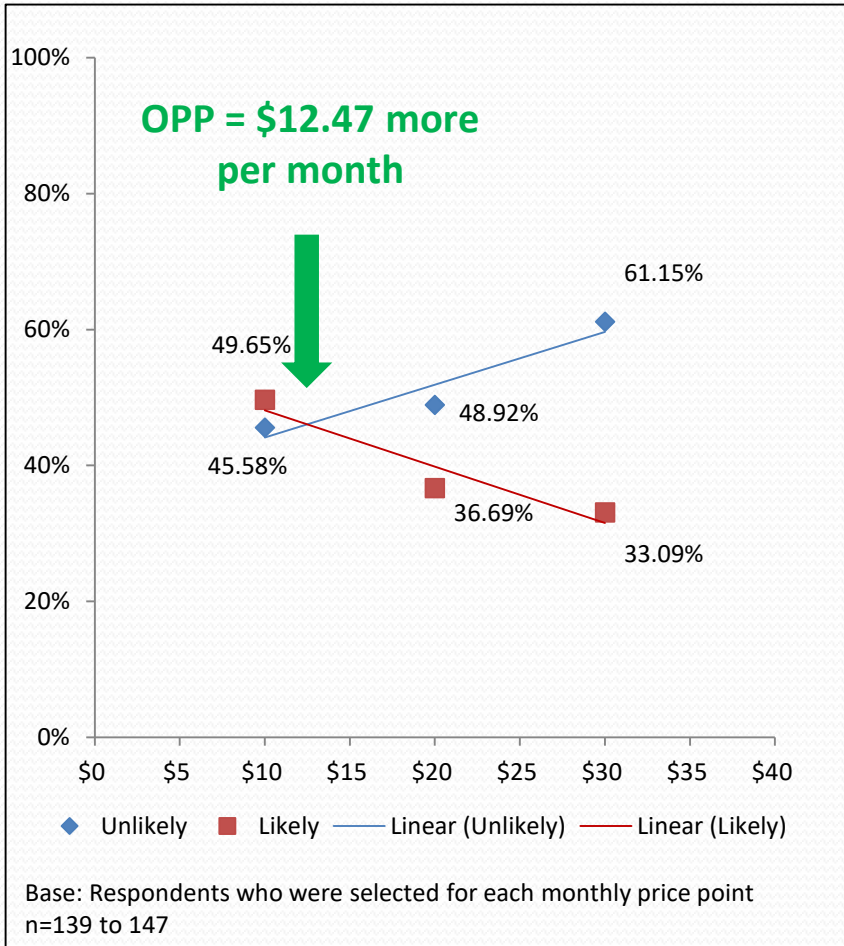
Reasons For Switching Internet Service Providers

- **Residents who have changed internet service providers in the past 5 years (n=139) most commonly switched because...**
 - Slow/poor internet speed (33%);
 - Too costly/expensive (17%);
 - Poor/bad service (unspecified) (11%); and
 - Internet connectivity related issues/internet frequently down/unreliable (10%).
- **Similarly, businesses that have changed internet service providers in the past 5 years (n=47) most commonly switched because...**
 - Slow/poor internet speed (23%);
 - Too costly/expensive (21%);
 - Poor/bad service (unspecified) (17%); and
 - Internet connectivity related issues/internet frequently down/unreliable (11%).

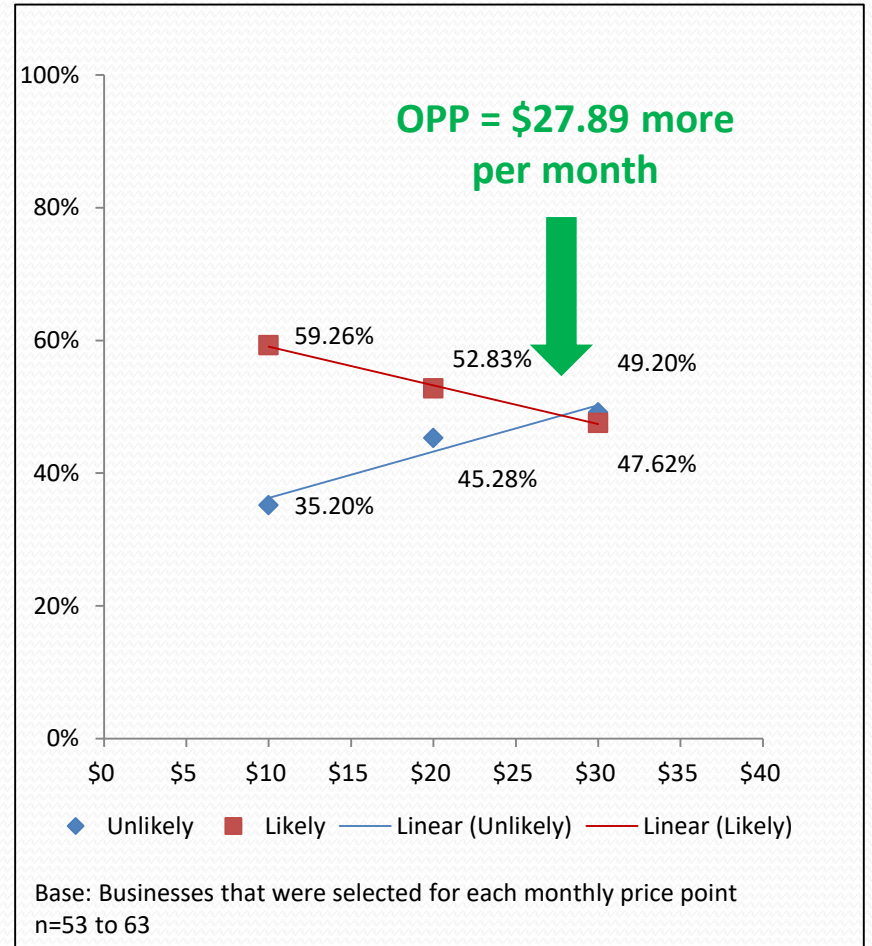


Optimal Price Point for Internet Service

Residents



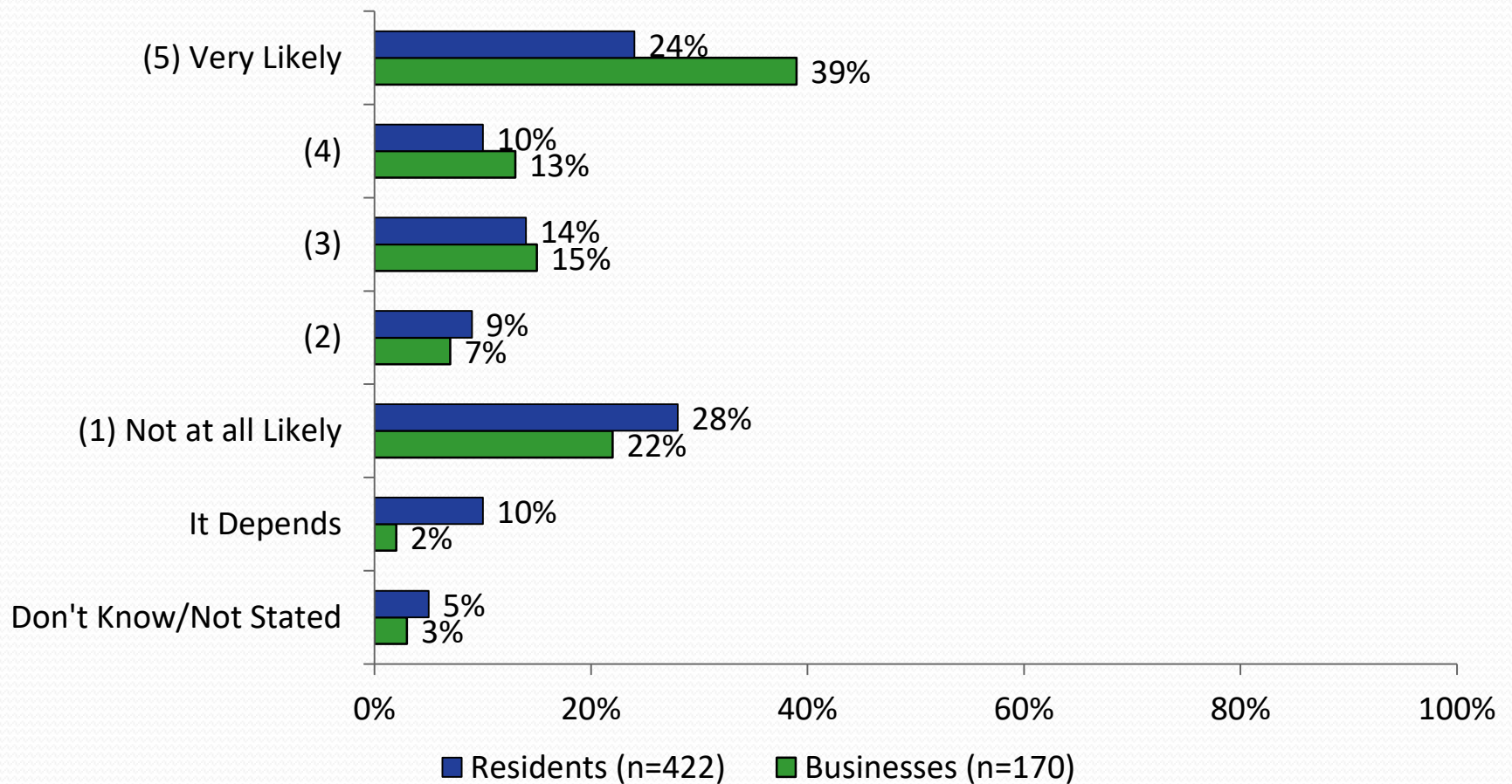
Businesses





Achieving Faster Internet Speeds

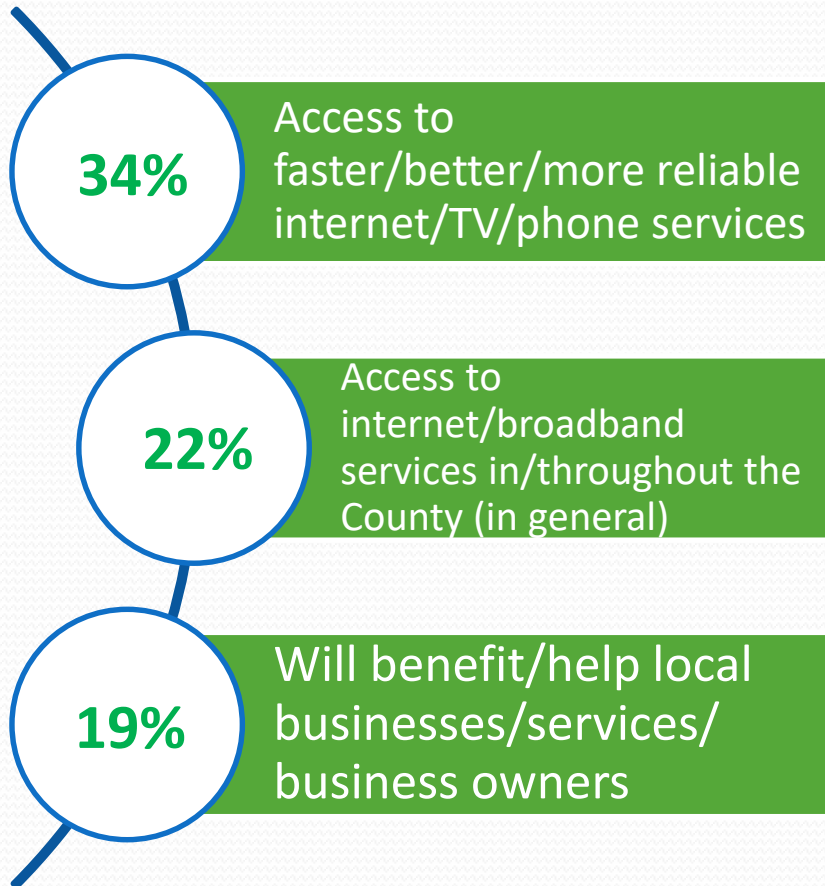
Overall, how likely would you be to subscribe, or switch from your current service provider to achieve faster internet speeds?



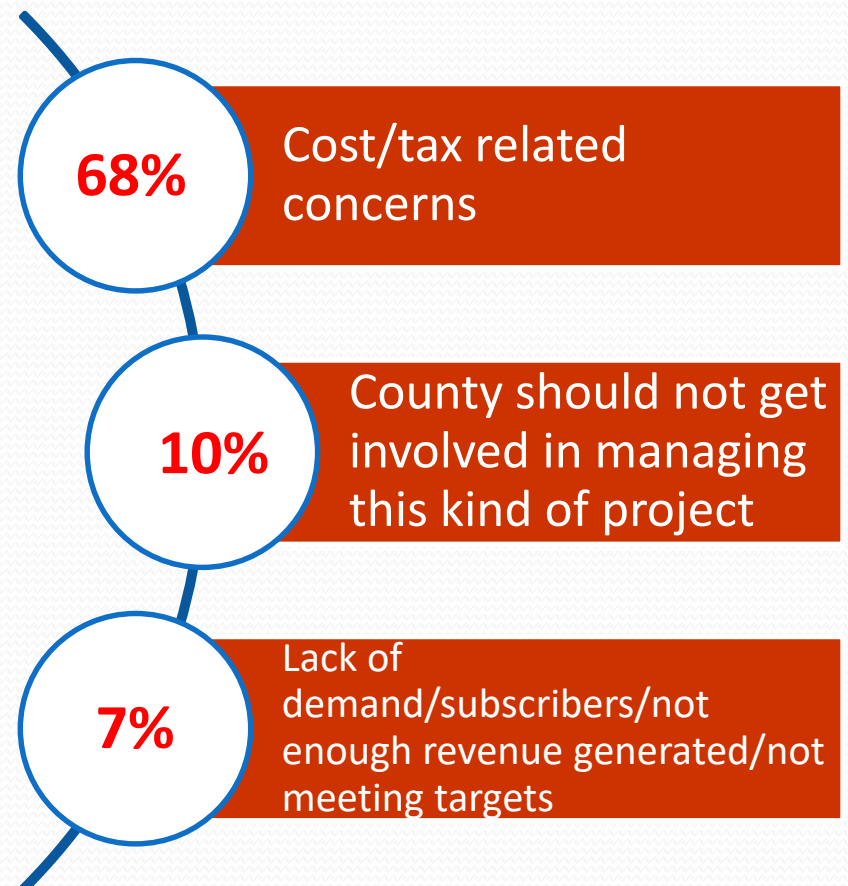
Base: Respondents who have an internet subscription

Benefits/Concerns of Pursuing an Enhanced Broadband Network (Residents)

Benefits (n=198)

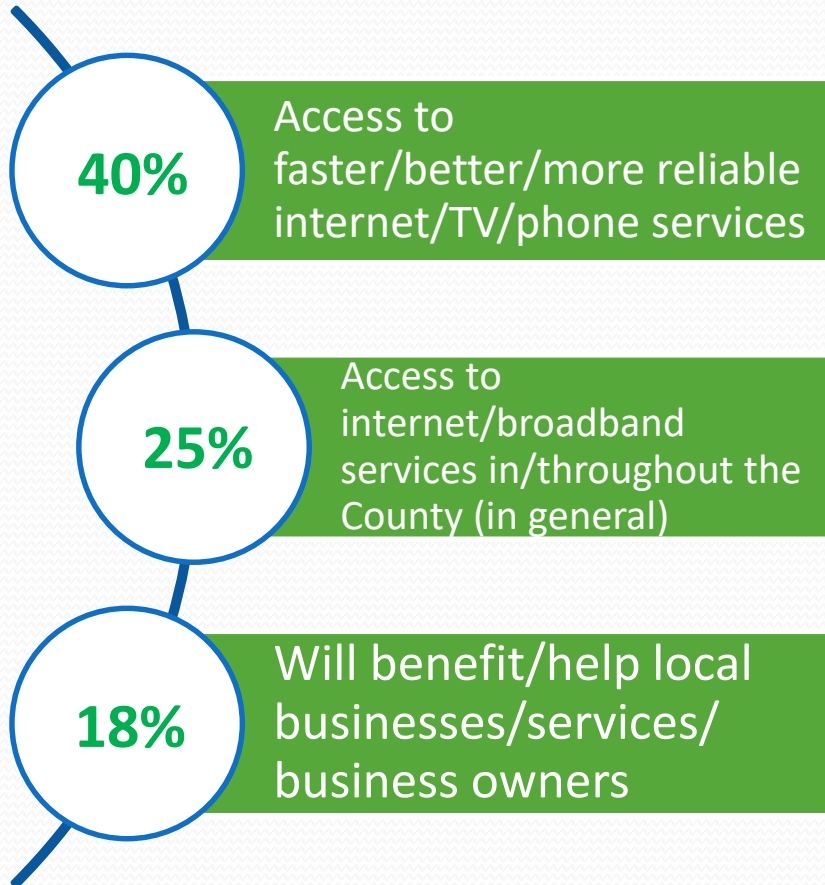


Concerns (n=228)

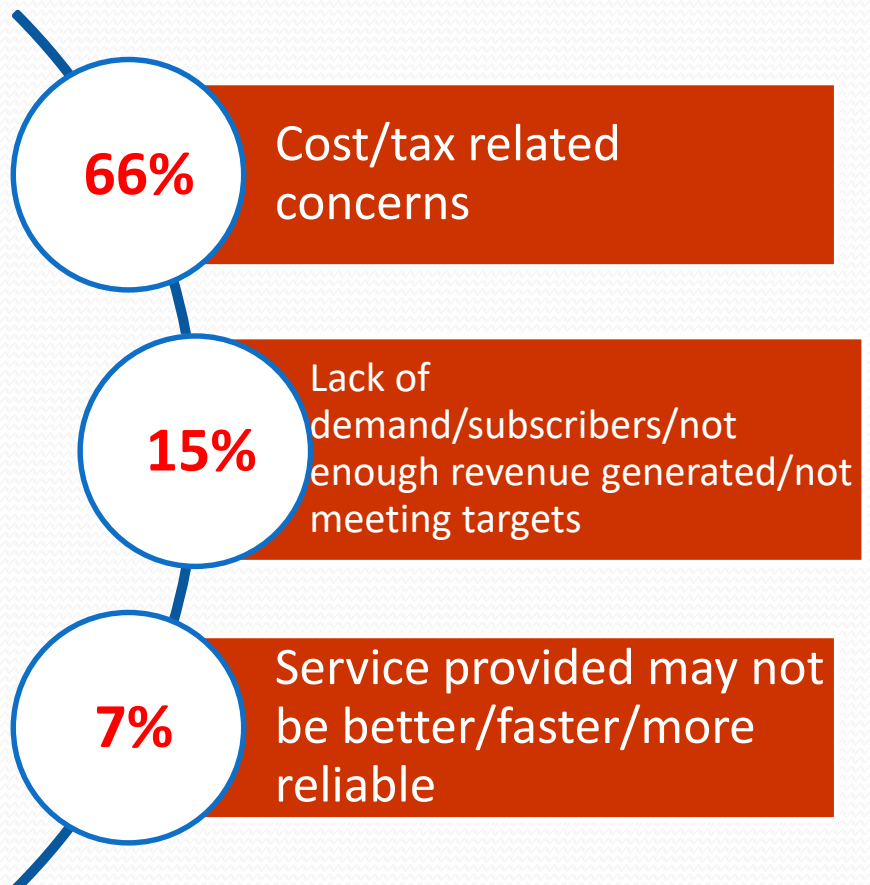


Benefits/Concerns of Pursuing an Enhanced Broadband Network (Businesses)

Benefits (n=134)



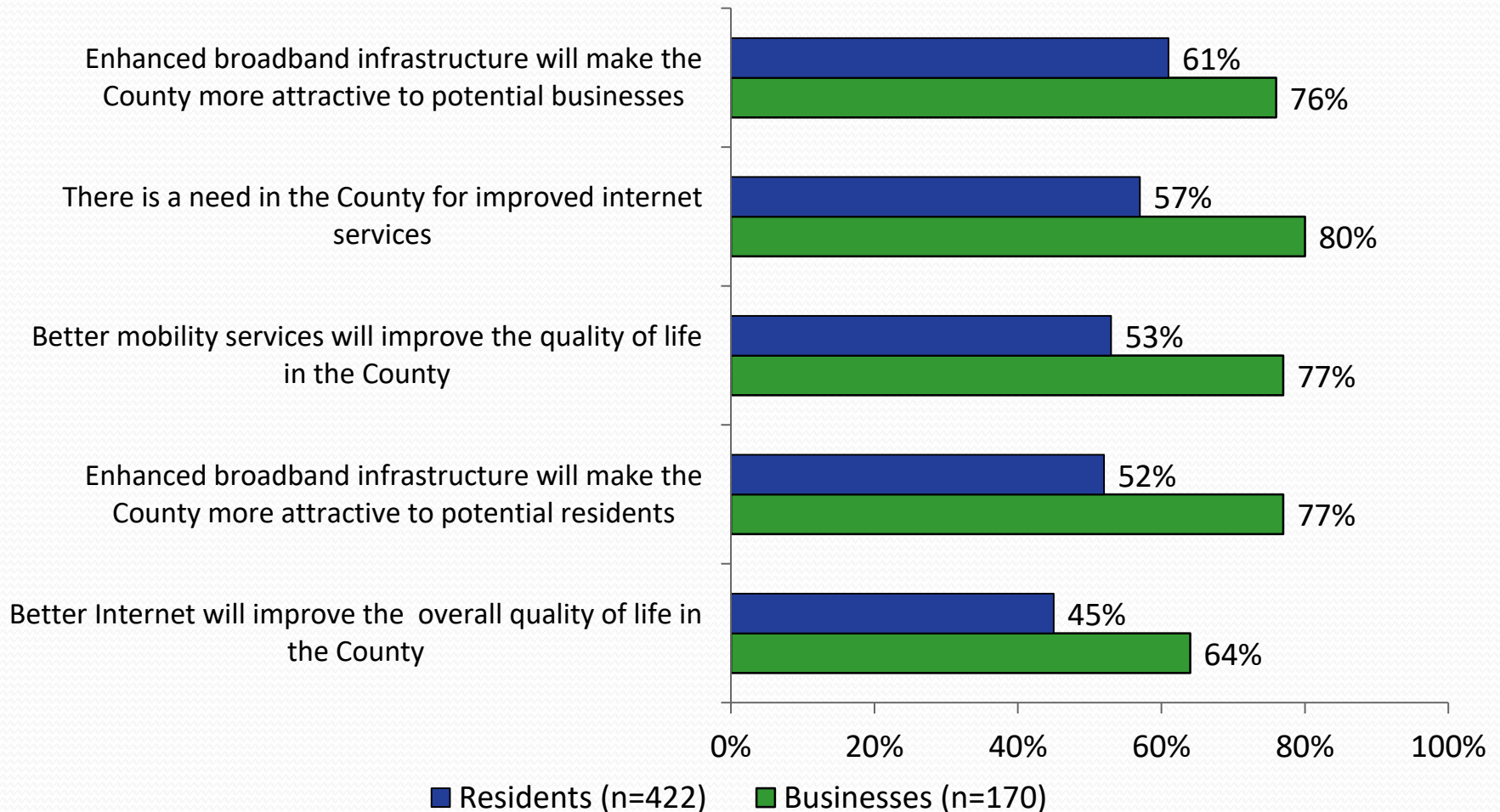
Concerns (n=88)





Statements regarding an enhanced broadband network*

How strongly do you agree that...

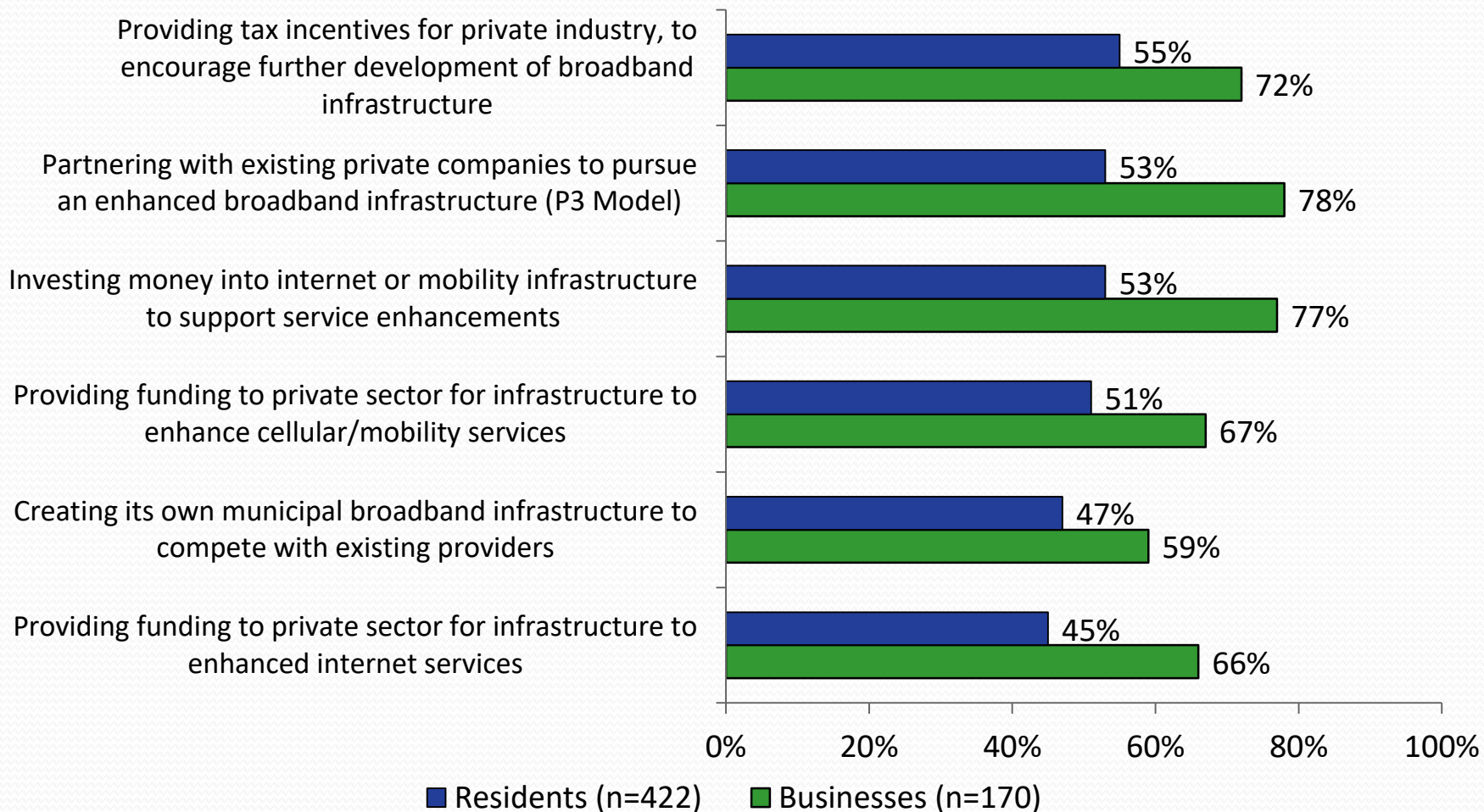


*Percent of respondents who agreed (ratings of 4 or 5 out of 5) with each statement



Support for an enhanced broadband network*

How strongly would you support or oppose...?



*Percent of respondents who somewhat or strongly supported each statement



Reasons for Support/Opposition (Residents)

Why do you support/oppose the County investing in capital infrastructure for internet or mobility service enhancements?

Reasons for Support (n=224) (Top Responses)

- Access to faster/better/more reliable internet/mobility services/speed (17%);
- Access to internet/mobility services in/throughout the County (16%); and
- Is a needed/required/essential services (15%).

Reasons for Opposition (n=166) (Top Responses)

- County should not get involved in managing this kind of project (27%);
- Cost/tax increase related concerns (27%); and
- There are existing service providers available to County residents (15%).

Base: Respondents who indicated support or opposition for the County investing in capital infrastructure for internet or mobility service enhancements



Reasons for Support/Opposition (Businesses)

Why do you support/oppose the County investing in capital infrastructure for internet or mobility service enhancements?

Reasons for Support (n=131) (Top Responses)

- Is a needed/required/essential service (23%);
- Access to internet/mobility services in/throughout the County (19%); and
- Will benefit/help local businesses/services/business owners (12%).

Reasons for Opposition (n=35) (Top Responses)

- Cost/tax increase related concerns (31%);
- County should not get involved in managing this kind of project (23%);
- There are existing service providers available to County residents (17%); and
- There are more important projects/priorities for the County to focus on (17%).

Base: Businesses that indicated support or opposition for the County investing in capital infrastructure for internet or mobility service enhancements



Questions?