



2017 Town of Sundre Broadband Demand Study

Final Report

June 22, 2017



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1.0 SUMMARY OF FINDINGS

The following is a summary of the key findings from the 2017 Town of Sundre Broadband Demand Study, conducted via web survey and telephone survey.

Respondent Profile

- Most commonly (75%), respondents were residential property owners. Fourteen percent (14%) were commercial property owners (14%), 6% were residential property renters, and 5% leased or rented commercial and/or industrial property for their organization.

Current Telecommunications Usage

- Respondents most often subscribed to internet (79%), followed by TV (cable or satellite) (62%), home phone (landline) not via the internet (50%), and home phone (landline) via the internet (11%).
 - Those who subscribed to internet (n=503) most commonly indicated that Telus was their service provider (93%);
 - Those who subscribed to TV (cable or satellite) (n=396) most commonly indicated that Shaw was their service provider (44%), followed by Telus (40%);
 - Those who subscribed to home phone (landline) via the internet (Voice over Internet Protocol, or VoIP) services (n=67) most commonly indicated that Telus (82%) was their service provider; and
 - Those who subscribed to home phone (landline) not via the internet (n=316) services most commonly indicated that Telus was their service provider (98%).
- Respondents were most commonly satisfied (ratings of 4 or 5 out of 5) with their home phone (landline) not via the internet service provider (70%), and home phone (landline) via the internet (60%), followed by TV (cable or satellite) (57%) and internet (45%).
- For each service [internet, TV (cable or satellite), home phone (landline) via the internet (Voice over Internet Protocol, or VoIP), and home phone (landline) not via the internet] (n=67-503), respondents most commonly had no contract (63% to 82%).
 - For **internet** services, respondents (n=503) most commonly paid \$50 to \$99 (63%) per month, with a mean of \$70;
 - For **TV (cable or satellite)** services, respondents (n=396) most commonly paid \$50 to \$99 (47%) monthly, with a mean of \$88;
 - For **home phone (landline) via the internet** services, respondents (n=67) most commonly paid \$1 to \$49 (46%) per month, with a mean of \$47;
 - For **home phone (landline) not via the internet** services, respondents (n=316) most commonly paid \$1 to \$49 (39%) per month, followed by \$50 to \$99 (24%), with a mean of \$79; and
 - For **all services combined**, respondents (n=560) most commonly paid \$150 to \$199 (21%), with a mean of \$164.

- Respondents who subscribe to the internet (n=503) most often indicated that there were 3 to 5 devices (38%) connected to their internet account, with a mean of 5 devices.
- Thirty-seven percent (37%) of respondents who subscribed to the internet (n=503) were satisfied with their current internet speeds, with a mean rating of 2.89 out of 5.

Overall Support For Broadband Fibre Optic Network Infrastructure

- Seventy-five percent (75%) of respondents (77% of residential properties; 65% of commercial properties) indicated that they either “strongly support” (52%), or “somewhat support” (23%) the Town’s pursuit of broadband fibre optic network infrastructure, while 19% (16% of residential properties; 30% of commercial properties) indicated that they either “somewhat oppose” (8%) or “strongly oppose” (11%) the Town’s efforts.
 - Respondents who supported the concept (n=475) highlighted access to faster and/or better internet services and/or speeds (33%), followed by the benefits it would have for Town growth (in general) (19%).
 - Respondents who opposed the concept (n=120) most commonly mentioned cost and/or tax increase related concerns (48%), followed by satisfaction with their current service provider (15%).
- Respondents were then provided with a series of statements regarding broadband fibre optic network infrastructure in the Town of Sundre, and asked to rate their agreement. Statements garnering agreement (ratings of 4 or 5 out of 5) of over 60% were:
 - “Broadband fibre optic network infrastructure will make the Town more attractive for potential businesses” (72% agreed);
 - “The Town should be proactive by pursuing broadband fibre optic network infrastructure for its residents and businesses” (69%);
 - “There is a need in the Town of Sundre for improved internet service” (68%);
 - “Broadband fibre optic network infrastructure will make the Town more attractive to potential residents” (67%); and
 - “There is a need in the Town of Sundre for improved telecommunications competition” (65%).

Likelihood of Subscribing to Services

- Respondents were asked how likely they would be to subscribe, or switch from their current service provider, to each service on the proposed broadband fibre optic network:
 - Sixty-four percent of respondents (64%) were likely (ratings of 4 or 5 out of 5) to switch, or subscribe to **internet** (65% of residential properties; 58% of commercial properties);
 - Forty-three percent (43%) were likely to switch, or subscribe to **TV (cable or satellite)** (45% of residential properties; 33% of commercial properties); and
 - Twenty-nine percent (29%) were likely to switch, or subscribe to **home phone (landline) via the internet (Voice over Internet Protocol, or VoIP)** (28% of residential properties; 35% of commercial properties).

- Those who were unlikely (ratings of 1 to 3 out of 5) to subscribe to each service were asked why they wouldn't subscribe:
 - Those who were unlikely to subscribe to **internet** on the proposed fibre optic network (n=193) most commonly cited service fees and/or charges would be too costly (38%);
 - Those who were unlikely to subscribe to **TV (cable or satellite)** (n=297) most commonly mentioned that they do not need or are not interested in the service, in general (41%); and
 - Those who were unlikely to subscribe to **home phone (landline) via the internet (Voice over Internet Protocol, or VoIP)** services (n=347) most commonly indicated that they are not interested in this service, in general (58%).

Model Alternatives

- The options proposed for the development of broadband fibre optic network infrastructure were presented as:
 - **Option A:** The Town of Sundre generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre; and
 - **Option B:** The Town of Sundre inviting a private company to install a fibre optic network with zero Town contribution.
- Seventy-five percent (75%) of respondents (76% of residential properties; 73% of commercial properties) supported Option A (the Town of Sundre generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre), while 20% opposed (20% of residential properties; 23% of commercial properties), and 5% did not know or did not provide a response.
- Forty-six percent (46%) of respondents (45% of residential properties; 49% of commercial properties) supported Option B (the Town of Sundre inviting a private company to install a fibre optic network with zero Town contribution), while 47% opposed Option B (47% of residential properties; 46% of commercial properties).
- Respondents were then asked to choose which option they prefer. Respondents most commonly preferred Option A (The Town of Sundre generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre) (**60% of respondents**; 60% of residential properties and 58% of commercial properties).
 - Twenty-five percent (25%) of respondents preferred Option B (The Town of Sundre inviting a private company to install a fibre optic network with zero Town contribution) (23% of residential properties; 33% of commercial properties).
 - Sixteen percent (16%) did not know or did not provide a response (18% of residential properties; 8% of commercial properties).

- Respondents were asked to provide potential benefits, and concerns or potential drawbacks of each option proposed by the Town.
- **Option A** (the Town generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre):
 - Potential benefits: Respondents mentioned that it would be a good source of local revenue, and revenue generated would be used within the Town (36%); and
 - Potential drawbacks or concerns: Respondents mentioned tax increase related concerns (37%).
- **Option B** (the Town inviting a private company to install the fibre optic network with zero Town contribution):
 - Potential benefits: Respondents mentioned no tax increase and/or no tax dollars used (42%).
 - Potential drawbacks or concerns: Respondents indicated that the installation of the network could take a long time or be delayed (17%), the Town will not be responsible for, and/or have strategic control of the network (16%), and expensive service fees (15%).

Final Comments

- When asked if they had any final comments regarding the topics in the survey, 73% did not provide comments, while 10% mentioned that the project is a good idea, and the Town should implement it as soon as possible, in general.

2.0 PROJECT BACKGROUND

In 2015, the Town of Sundre (“The Town”; “The Client”) began investigating the possibility of Sundre becoming a gigabit community via broadband fibre optics. Recognizing that broadband is an economic driver, the Town was provided with enough funding to assess the feasibility of installing a broadband fibre optic network.

To ensure that there was adequate public consultation on the matter, the Town commissioned Banister Research & Consulting Inc. (“Banister Research”) in Spring, 2016 to conduct an unbiased and comprehensive public engagement process to determine the public’s appetite to spend public dollars on a wholesale broadband demand network and the market demand for such a network.

Over April and May, 2017, Banister Research and the Town of Sundre worked collaboratively to engage residents and commercial businesses via a multi-mode data collection approach, including:

- **Research Invitation Letter via Mail.** Residential and property renters and owners, and commercial property owners, renters, and leaseholders were mailed survey invitations from the Banister Research call centre between April 28th and May 2nd, 2017. The invitations informed them of the research and outlined the various ways in which residents and stakeholders could participate in the survey, as well as notifying them of the Information Sessions.
- **Web Survey.** A survey link with an individual PIN or unique ID was provided to each recipient of the letter; a total of n=308 responses were received via the web survey between April 28th and May 24th, 2017.
- **Telephone Survey.** Those who had not responded to the web survey by a pre-determined date were followed up with via telephone; should residents and stakeholders have preferred to conduct the survey via telephone, instructions to contact Banister Research were also provided in the letter. Banister Research began conducting follow-up calls on May 10th, and continued until May 24th, 2017. A total of n=327 responses were collected via telephone survey.
- **Information Sessions.** To inform the public about the details of the network, cost implications, and funding models, as well as inform residents and stakeholders about the survey opportunity, the Town hosted three (3) information sessions on May 9th, 2017. Banister Research facilitated the information sessions to answer any questions about the survey and collect contact information for attendees who desired follow-up regarding the survey.
- **Door-to-Door Follow-Up.** The Town of Sundre recruited volunteers to go door-to-door in the community from May 15th to May 23rd, 2017, to ensure that residents were aware of the survey and to collect their information should they desire follow-up from Banister Research to participate in the survey.

The detailed information on the research methodology and engagement opportunities included in the Broadband Demand Study is included in Section 3.0 of this report.

3.0 METHODOLOGY

All components of the project were designed and executed in close consultation with the Town of Sundre. A detailed description of each task of the project is outlined in the remainder of this section.

3.1 Project Initiation & Questionnaire Design

At the outset of the project, all background information relevant to the study was identified and subsequently reviewed by Banister Research. The consulting team familiarized itself with the objectives of the project, ensuring a full understanding of the issues and concerns to be addressed in the project. The result of this task was an agreement on the research methodology, a detailed work plan and project initiation.

Banister Research worked closely with the Client in designing the survey instrument, which was designed to elicit current needs, habits, service providers, resident/business support of a broadband fibre optic network in Sundre, operational model preference, and consumer likelihood of switching to an internet service provider that would use a Town-owned network. The questionnaire included a combination of closed- and open-ended questions. Following Client review of the initial draft, all necessary changes were made by Banister Research and the questionnaire was re-submitted for final review and approval by the Town of Sundre. A copy of the final questionnaire is provided in Appendix A.

3.2 Survey Population

There were four (4) target populations for the purposes of the Broadband Demand Study, including:

- Residential property owners;
- Commercial property owners;
- Residential property renters; and
- Commercial property renters and leaseholders.

The Town of Sundre provided Banister Research with the contact lists for the study, which were obtained through the Town's most recent tax roll, the active business registrant list, and lists of current renters as provided by the Town's utility company. Banister Research subsequently ordered a telephone sample for residents of the Town of Sundre, to enable the calling of residents whose phone numbers were not included in the lists received from the Town. Banister Research subsequently reviewed and cleaned the lists, to minimize duplication across different sources. It should be noted that, for the purposes of this study, respondents who were identified as belonging to more than one of the above populations – e.g., residential property owners who also operate a commercial business – were invited to complete the survey on behalf of each perspective they represented.

The overall response rate was 31% (n=635), based on a contact list of 2,021 records. Based on a population of 2,021 property units¹ in Sundre, results yield a margin of error no greater than $\pm 3.2\%$ at the 95% confidence level, or 19 times out of 20.

3.3 Data Collection

To inform residents and commercial property owners and renters about the survey and provide instructions to access the survey, Banister Research prepared an invitation letter which was mailed to all households and businesses as provided by the Town of Sundre. The letter introduced Banister Research and informed potential respondents of the importance of participation, as well as assured recipients that all information is protected under FOIP; the Town provided their logo and branding to reassure potential respondents of the legitimacy of the survey. The letter included the following:

- Instructions to access the survey online or by phone;
- Details regarding the Information Sessions;
- Contact information for a representative from the Town of Sundre to respond to any concerns regarding the content or legitimacy of the survey;
- A link to the web site for the Sundre Broadband Demand Study – SundreBroadband.com (developed and managed by the Town of Sundre); and
- Contact information for Banister Research to respond to any technical issues or concerns.

The final counts by mode of completion (web and telephone) are outlined in the table below. More information on data collection via each of these methods, as well as the other efforts made to engage residents and businesses are included in the following sections.

Respondent Group	Mode of Completion		Total Number of Respondents
	Phone	Web/Online	
Residential property owner	236	240	476
Commercial property owner	49	42	91
Residential property renter	22	17	39
I lease or rent commercial/industrial property for my organization	20	9	29
Total	327	308	635

¹ “Property units” include residential and commercial properties in Sundre. A single property unit may have had multiple respondents (i.e., property owner and renter).

3.3.1 Web Survey

Banister Research programmed and hosted the web-based version of the survey. Prior to beginning data collection, a preview link was shared with the Town of Sundre for review and approval. Those who received a letter were provided with a URL or link to access the survey, and a unique ID or PIN to enable tracking and prevent duplication of responses, as well as allow the respondent the flexibility of pausing and resuming the survey at their own convenience. A total of n=308 surveys were completed online between April 28th and May 24th, 2017.

3.3.2 Telephone Survey & Follow-Up

Those who received a letter were notified that Banister Research would be conducting follow-up calls beginning May 10th, 2017; had the respondent wished to make an appointment with an interviewer, the toll-free telephone number for Banister Research’s call centre was provided. Banister Research began conducting follow-up calls on May 10th, 2017, and continued until the survey’s closing on May 24th. A total of n=327 surveys were completed via telephone.

To maximize the sample, up to five (5) call back attempts were made to each listing requiring follow-up, prior to excluding it from the final sample. Busy numbers were scheduled for a call back every fifteen (15) minutes. Where there was an answering machine, fax, or no answer, the call back was scheduled for a different time period on the following day. The first attempts to reach each listing were made during the evening or on weekends.

The following table demonstrates the results of the final call attempts.

Call Classification	Number of Records
Completed Interviews (including web completes)	635
Busy/No Answer/Answering Machine	158
Respondents Unavailable/Appointments Set	34
Refusals	475
Fax/Modem/Not-In-Service/Wrong Number (i.e., ineligible numbers)	304
Communication Problem/Language Barrier	12
Sample Untouched (Records without phone numbers)	403
Total Sample Loaded	2,021

At the outset of the fieldwork, all interviewers and supervisors were given a thorough step-by-step briefing to ensure the successful completion of telephone interviews. To ensure quality, at least 20% of each interviewer’s work was monitored by a supervisor on an on-going basis.

The questionnaire was programmed into Banister Research's Computer Assisted Telephone Interviewing (CATI) system. Using this system, data collection and data entry were simultaneous, as data was entered into a computer file while the interview was being conducted. Furthermore, the CATI system allowed interviewers to directly enter verbatim responses to open-ended questions.

3.3.3 Additional Engagement Opportunities

Information Sessions

The Town of Sundre hosted three (3) information sessions on Tuesday, May 9th, 2017 to educate and inform the public on the benefits of a fibre-optic broadband network; the costs and tax implications of providing the service; and the funding models for a fibre-optic broadband network.

The sessions were held at three different times (10:00 am, 12:00 pm, and 5:30 pm) at the Sundre Community Centre to ensure that anyone who wished to attend would be able to. The mail-out invitation letter included the details about the information session. Banister Research worked with the Town of Sundre to produce a poster with details about the information sessions, which were circulated to groups with vested interests (e.g., local doctors, the Sundre business community, and Seniors community) by the Town of Sundre. Representatives of the Town of Sundre (including members of Council) were in attendance to lead the discussion and answer questions; Tracy With, Vice President of Banister Research, was present at the sessions to answer any questions about the survey and collect any contact information from residents or businesses desiring follow-up regarding the survey. The Town of Sundre developed a brochure with information on the Sundre Broadband Opportunity, which was distributed to attendees of the information sessions.

Door-to-Door Follow-Up

To ensure that residents were aware of the survey opportunity and increase the overall response rate, the Town of Sundre recruited a team of volunteers to go door-to-door between May 15th and May 23rd, 2017. Banister Research developed a script for the volunteer team, to: a) thank residents who had already completed the survey for taking their time to participate; b) remind those who had not participated of the importance of participating and the survey deadline; and c) inform those who were unaware of the survey of the purpose of the research and how they could participate. The volunteers also recorded the contact information for residents requiring follow up from Banister Research and those who wished to be removed from the list. The Town of Sundre faxed these requests to Banister Research, who followed up daily with those requesting a telephone interview or a web link; those requesting to be removed from the list were promptly excluded and removed from the system, to ensure they did not receive any further reminder calls. Outcomes of door-to-door follow-up visits are provided on the following page.

	Number of Properties
Total Visited	798
Did not request contact	726
Requested contact	72
Phone	40
Email	31
Phone and Email	1

3.4 Data Analysis

While data was being collected, Banister Research provided weekly progress reports to the Client, at minimum. After the questionnaires were completed and verified, all survey data was compiled into a computerized database for analysis. Data analysis performed by Banister Research included cross-tabulation, whereby the frequency and percentage distribution of the results for each question were broken down based on respondent characteristics and responses. Statistical analysis included a Z-test to determine if there were significant differences in responses between respondent subgroups. Results are reported as statistically significant at the 95% confidence level.

A list of responses to each open-ended question were generated by Banister Research. The lead consultant reviewed the list of different responses to the open-ended or verbatim question and then a code list was established. To ensure consistency of interpretation, the same team of coders was assigned to this project from start to finish. The coding supervisor verified at least 10% of each coder's work. Once the questionnaires were fully coded, computer programs were written to check the data for quality and consistency. All survey data was compiled into a computerized database for analysis. Utilizing SPSS analysis software, the survey data was reviewed to guarantee quality and consistency (e.g., proper range values and skip patterns).

The reader should note that any discrepancies between charts or tables are due to the rounding of the numbers.

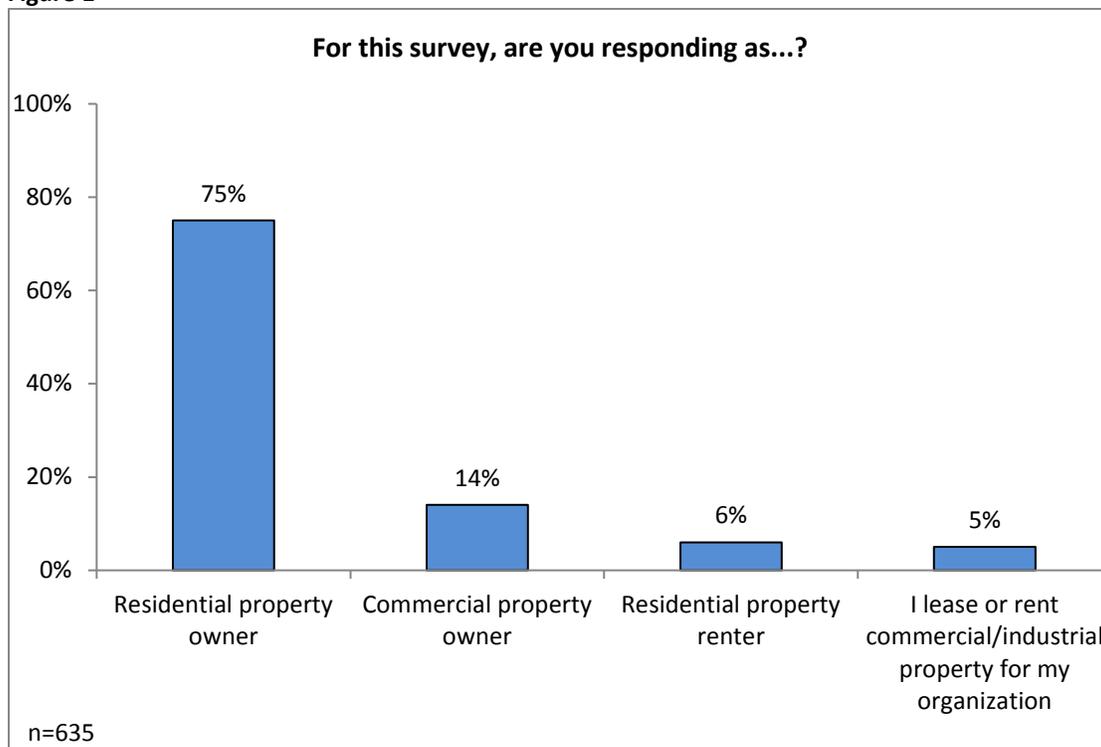
4.0 STUDY FINDINGS

Results of the survey are presented as they relate to the specific topic areas addressed by the survey. The reader should also note, when reading the report that the term *significant* refers to “statistical significance.” Only those respondent subgroups which reveal statistically significant differences at the 95% confidence level (19 times out of 20) have been included. Respondent subgroups that are statistically similar have been omitted from the presentation of findings.

4.1 Respondent Profile

To begin the survey, respondents were asked to identify their relation to the property for which they were completing the survey. Most commonly (75%), respondents were residential property owners. Fourteen percent (14%) were commercial property owners, 6% were residential property renters, and 5% leased or rented commercial and/or industrial property for their organization. See Figure 1, below.

Figure 1



4.2 Current Telecommunications Usage

Respondents were then asked which telecommunications services they subscribe to at the address for which they were completing the survey. Most commonly, respondents subscribed to internet (79%), followed by TV (cable or satellite) (62%), and home phone (landline) not via the internet (50%). Eleven percent (11%) of respondents subscribed to home phone (landline) via the internet (Voice over Internet Protocol, or VoIP). See Figure 2, and Table 1, below.

Figure 2

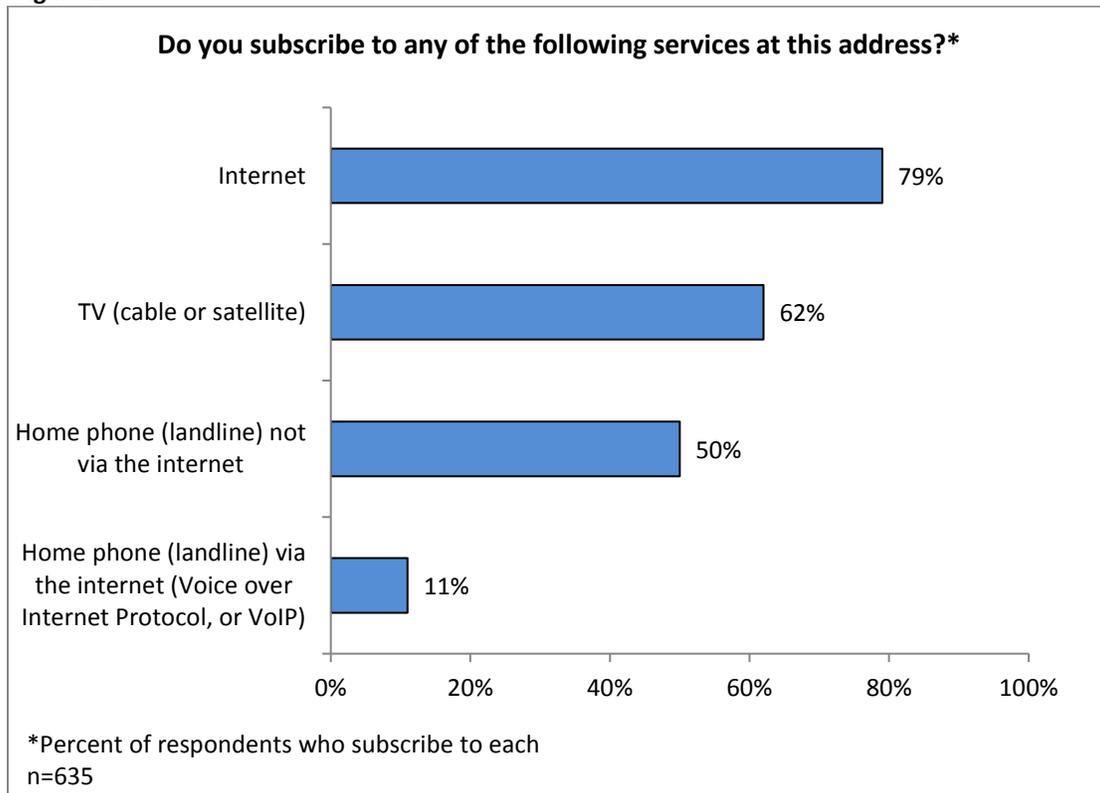


Table 1

Do you subscribe to any of the following services at this address?				
	Percent of Respondents (n=635)			
	Yes	No	Not applicable/ Don't make subscription decisions	Don't know/ Not stated
Internet	79	15	5	<1
TV (cable or satellite)	62	33	5	<1
Home phone (landline) not via the internet	50	44	5	1
Home phone (landline) via the internet (Voice over Internet Protocol, or VoIP)	11	83	5	2

Sub-Segment Findings

Respondent subgroups who were significantly more likely to subscribe to **internet** included the following:

- Residential property respondents² (81%) versus commercial property respondents (73%);
- Those aged 25 to 34 (96%) and 35 to 54 (89%) versus those aged 55 to 64 (71%) and 65 years or older (74%);
- Those in detached single family dwellings (85%) versus those in semi-detached single family dwellings/duplexes (73%);
- Those with children in their household (92%) versus those without children in their household (81%); and
- Business properties who have operated in Sundre for 10 years or less (86%) versus 11 to 20 years (64%).

Respondent subgroups who were significantly more likely to subscribe to **TV (cable or satellite)** included the following:

- Residential property owners (74%) and residential property renters (64%) versus commercial property owners (21%);
- Residential property respondents (73%) versus commercial property respondents (18%);
- Those aged 65 years or older (86%) versus those aged 55 to 64 (72%), 35 to 54 (72%), and 25 to 34 (52%); and
- Those without children in their household (78%) versus those with children in their household (67%).

Residential property owners (11%) and residential property renters (15%) were significantly more likely to subscribe to **home phone (landline) via the internet (Voice over Internet Protocol, or VoIP)** than commercial property owners (4%).

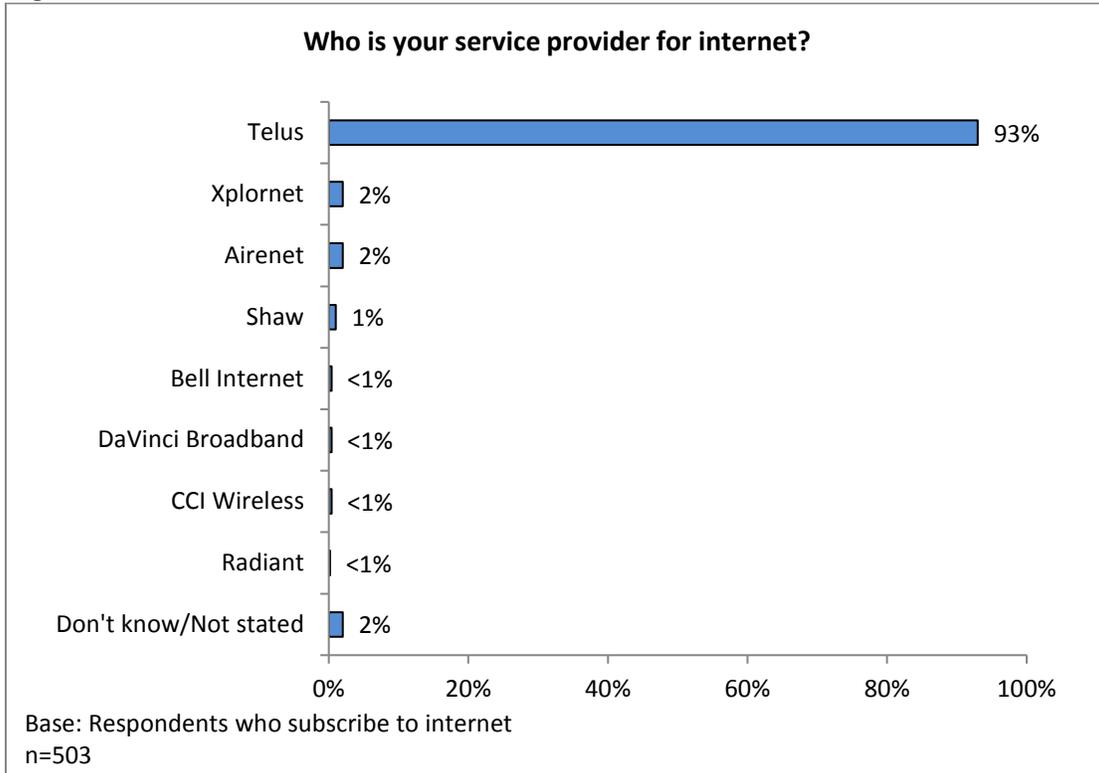
Respondent subgroups who were significantly more likely to subscribe to **home phone (landline) not via the internet** included the following:

- Residential property owners (49%) and commercial property owners (62%) versus residential property renters (26%);
- Commercial property respondents (63%) versus residential property respondents (47%);
- Those aged 65 years or older (65%), 55 to 64 (40%), and 35 to 54 (46%) versus those aged 25 to 34 (19%); and
- Those in detached single family dwellings (51%) versus those in semi-detached single family dwellings/duplexes (33%).

² Residential property respondents (n=515) includes residential property owners (n=476) and residential property renters (n=39). Commercial property respondents (n=120) includes commercial property owners (n=91) and those who lease or rent commercial property/industrial property for their organization (n=29).

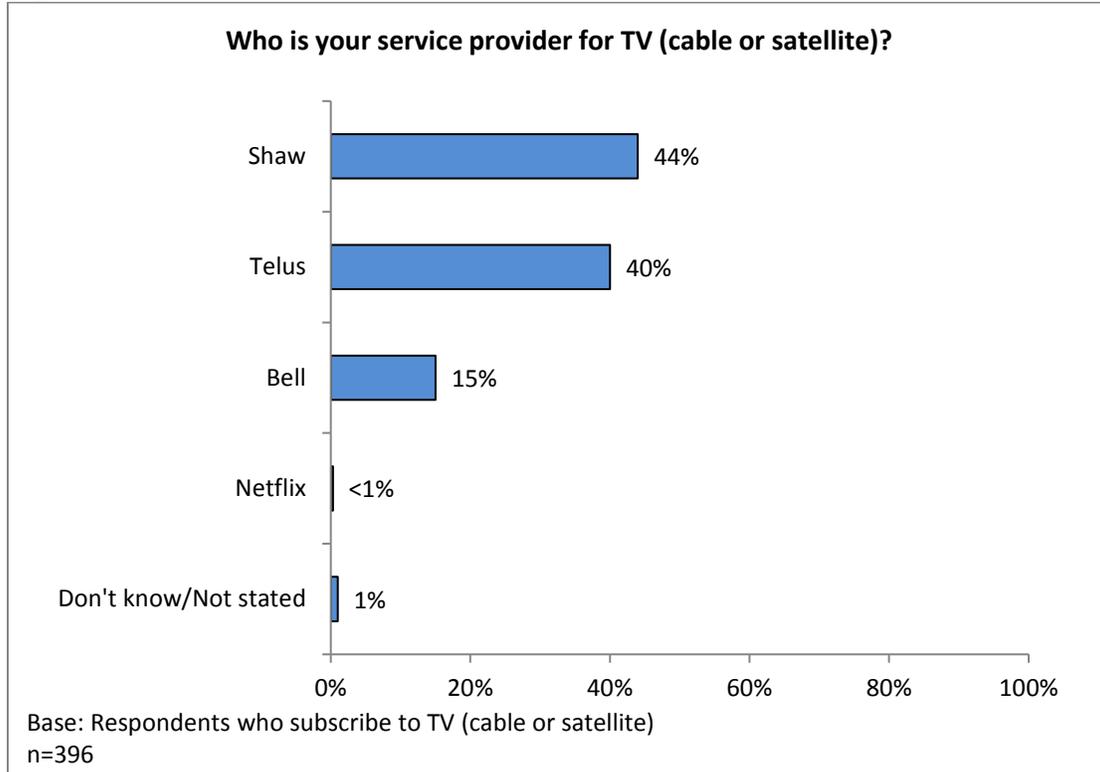
Those who subscribed to each service, were then asked for their service provider is. Those who subscribed to internet (n=503) most commonly indicated that Telus was their service provider (93%). See Figure 3, below.

Figure 3



Respondents who subscribed to TV (cable or satellite) (n=396) most commonly indicated that Shaw was their service provider (44%), followed by Telus (40%) and Bell (15%). See Figure 4, below.

Figure 4



Sub-Segment Findings

Respondent subgroups who were significantly more likely to subscribe to **Shaw** for TV (cable or satellite) services included the following:

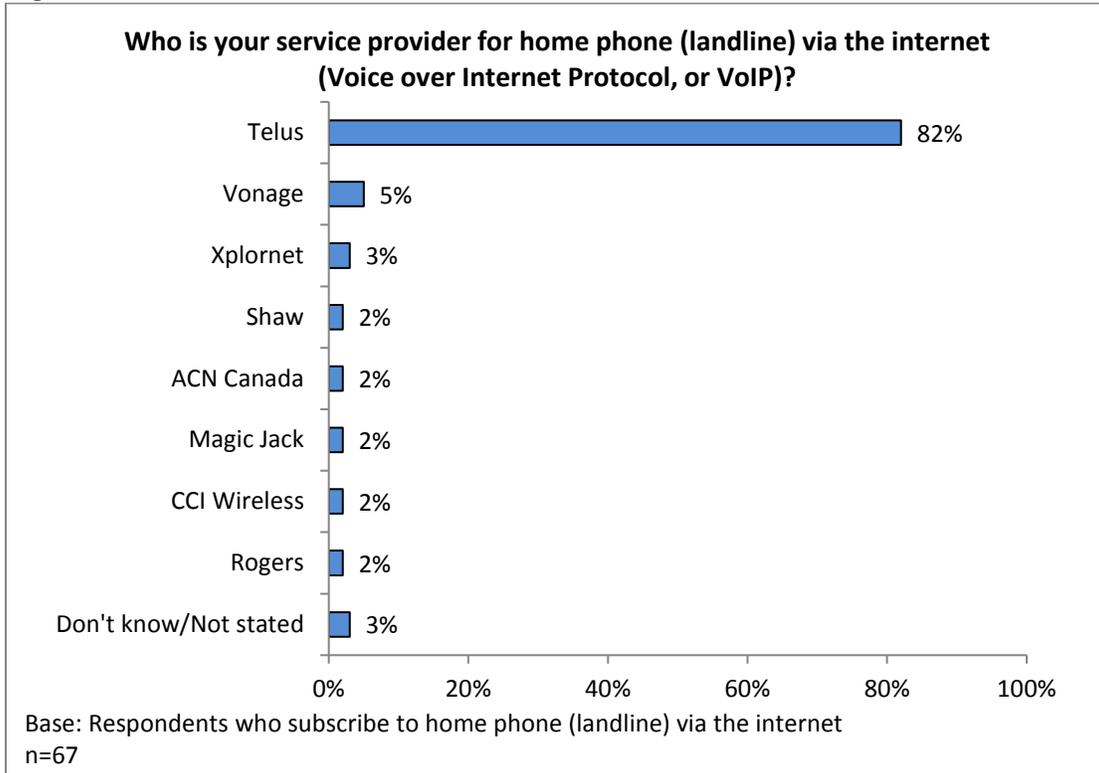
- Those aged 65 years or older (48%) and 55 to 64 (57%) versus those aged 35 to 54 (34%); and
- Those without children in their household (48%) versus those with children (28%) in their household.

Respondent subgroups who were significantly more likely to subscribe to **Telus** for TV (cable or satellite) services included the following:

- Those aged 35 to 54 (48%) versus those aged 55 to 64 (28%); and
- Those with children in their household (54%) versus those without children in their household (37%).

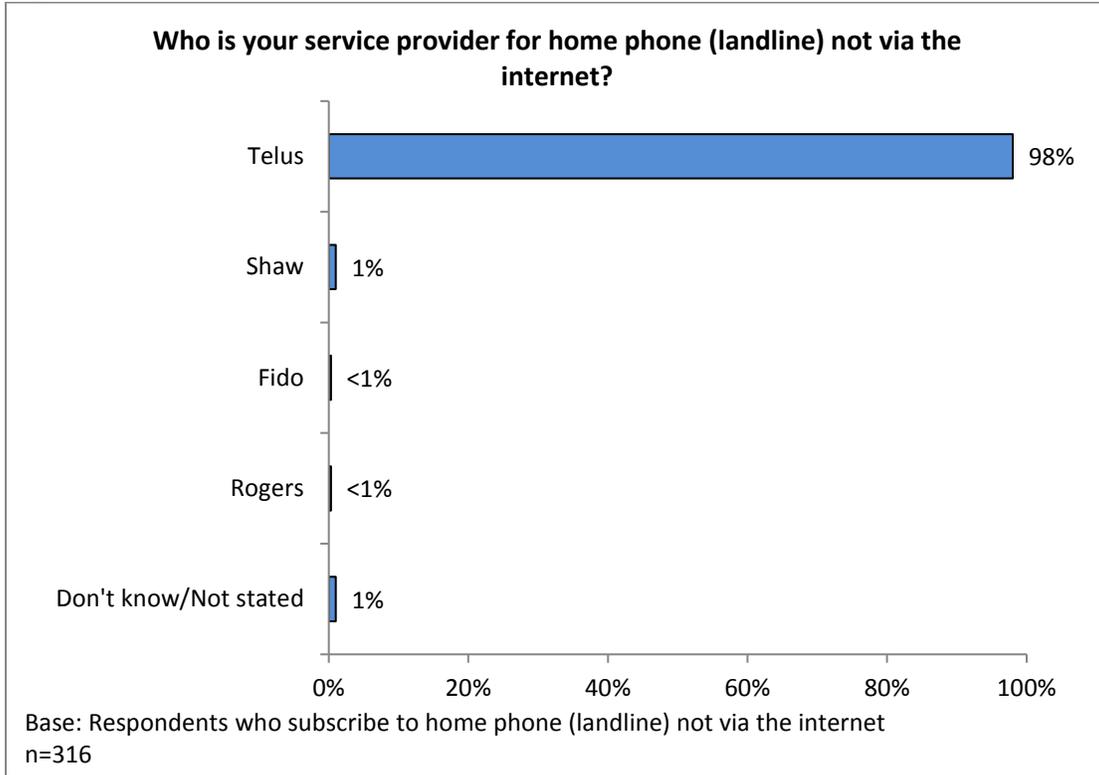
Respondents who subscribed to home phone (landline) via the internet (Voice over Internet Protocol, or VoIP) services (n=67) most commonly indicated that Telus (82%) was their service provider. See Figure 5, below.

Figure 5



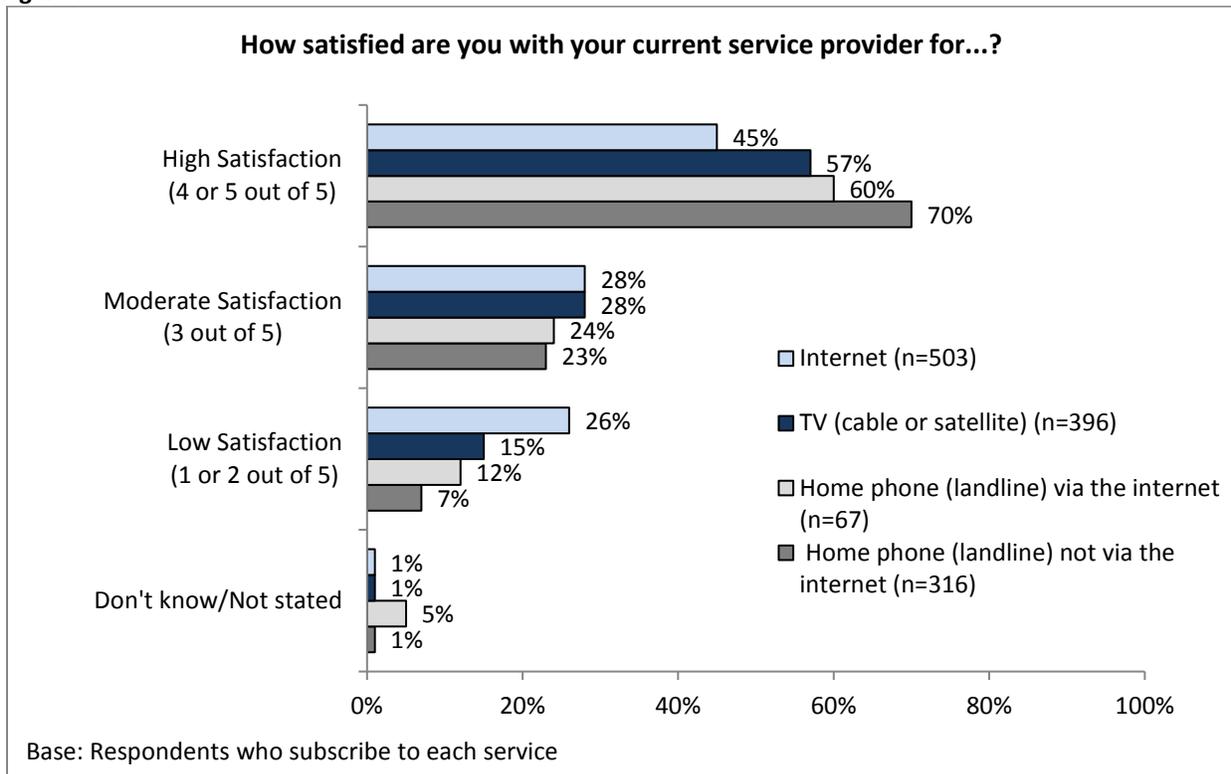
Those who subscribed to home phone (landline) not via the internet (n=316) services most commonly indicated that Telus was their service provider (98%). See Figure 6, below.

Figure 6



Respondents who subscribed to each service (n=67-503) were asked how satisfied they were with their service provider for each. Respondents were most commonly satisfied (ratings of 4 or 5 out of 5) with their home phone (landline) not via the internet service provider (70%), followed by home phone (landline) via the internet (60%). Respondents were least commonly satisfied with their internet service provider for internet (45%) and TV (cable or satellite) (57%). See Figure 7, below, and Table 2, on Page 22 for detailed responses.

Figure 7



Sub-Segment Findings

Respondent subgroups who were significantly more likely to be satisfied (ratings of 4 or 5 out of 5) with their current service provider for **internet** included the following:

- Females (52%) versus males (36%);
- Those aged 65 or older (60%) versus those aged 25 to 34 (30%) and 35 to 54 (39%); and
- Those without children in their household (51%) versus those with children in their household (34%).

Respondent subgroups who were significantly more likely to be satisfied (ratings of 4 or 5 out of 5) with their current service provider for **TV (cable or satellite)** included the following:

- Females (66%) versus males (47%); and
- Those without children in their household (63%) versus those with children in their household (43%).

Respondent subgroups who were significantly more likely to be satisfied (ratings of 4 or 5 out of 5) with their current service provider for **home phone (landline) not via the internet** included the following:

- Those without children in their household (74%) versus those with children in their household (57%); and
- Those aged 65 or older (78%) versus those aged 35 to 54 (64%).

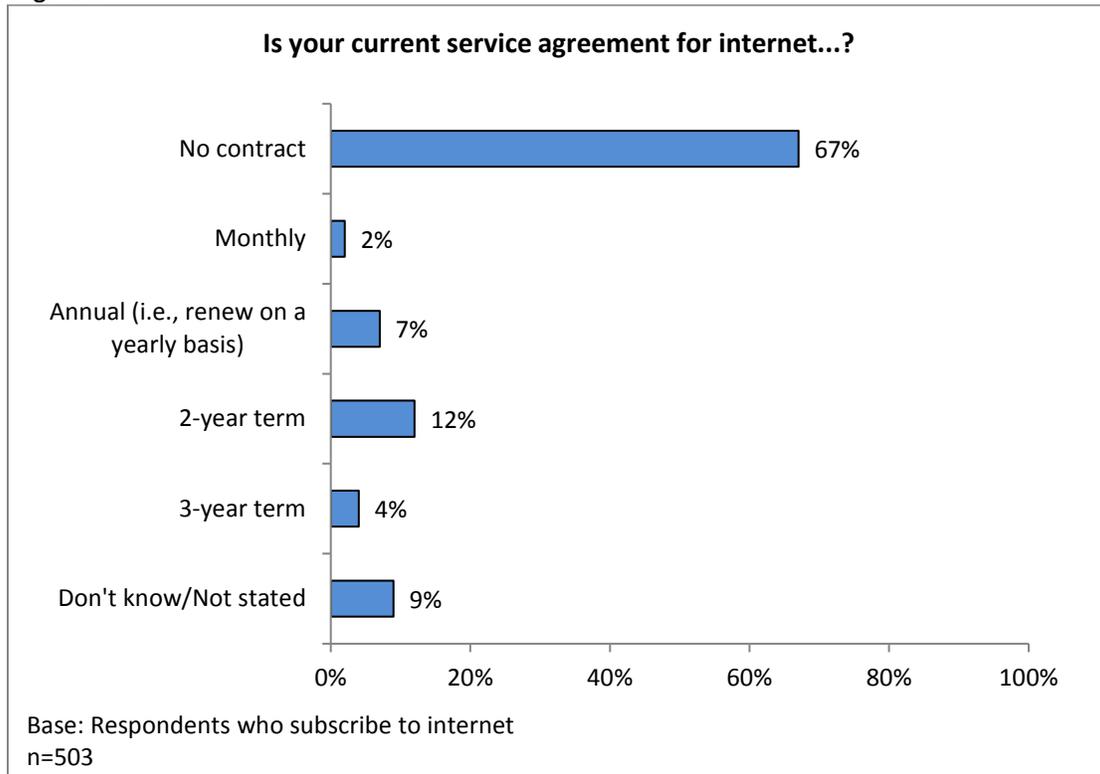
Table 2

How satisfied are you with your current service provider for...?							
Base: Respondents who subscribe to each service	Percent of Respondents						
	(1) Very Dissatisfied	(2)	(3)	(4)	(5) Very Satisfied	Don't know/ Not Stated	Mean (out of 5)
Home phone (landline) not via the internet (n=316)	1	5	23	28	42	1	4.05
Home phone (landline) via the internet (n=67)	6	6	24	27	33	5	3.78
TV (cable or satellite) (n=396)	4	11	28	27	30	1	3.68
Internet (n=503)	12	14	28	26	19	1	3.26

Respondents who subscribed to each service were then asked about their current service agreement for each service that they subscribed to.

Those who subscribed to internet (n=503) most commonly had no contract (67%). See Figure 8, below.

Figure 8



Sub-Segment Findings

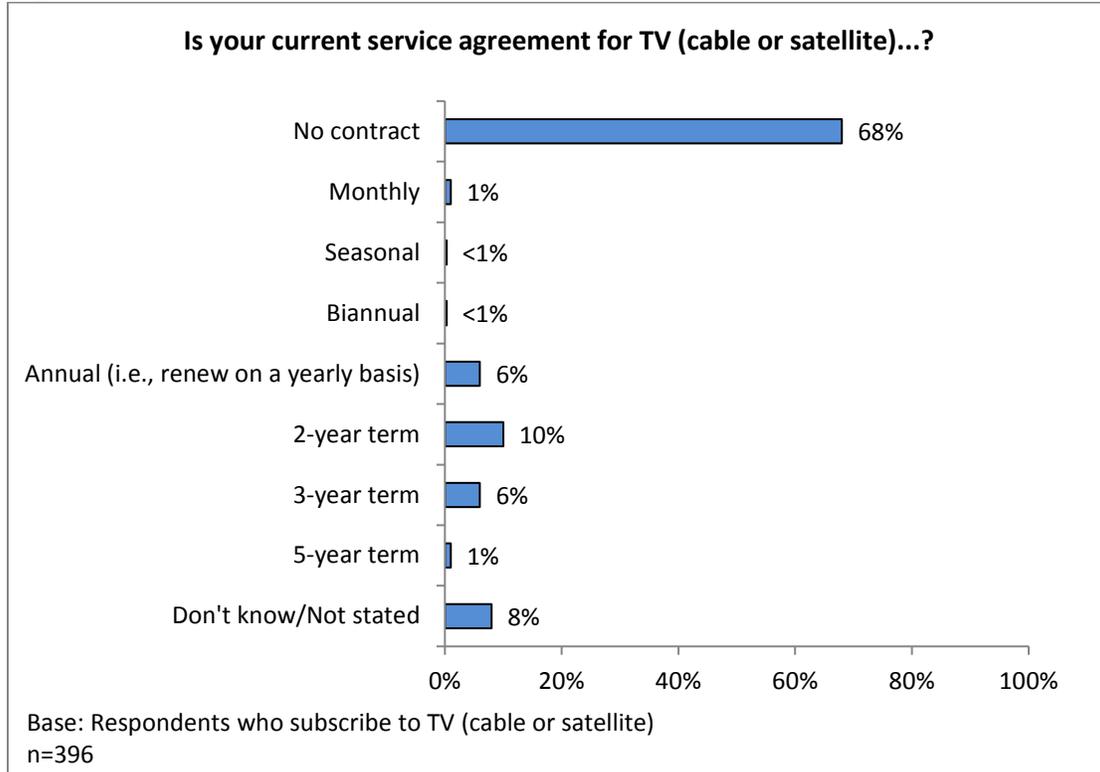
Respondent subgroups who were significantly more likely to have a service agreement for a **2-year term** for **internet** included the following:

- Females (16%) versus males (9%);
- Those aged 25 to 34 (20%) versus those aged 55 to 64 (6%) and 65 or older (9%); and
- Those with children in their household (20%) versus those without children in their household (9%).

Those aged 25 to 34 (9%) and 55 to 64 (9%) were significantly more likely to have a service agreement for a **3-year term** for **internet** versus those aged 65 or older (2%):

Those who subscribed to TV (cable or satellite) (n=396) most commonly had no contract (68%). See Figure 9, below.

Figure 9



Sub-Segment Findings

*Those without children in their household (71%) were significantly more likely to have a service agreement with **no contract** for TV (cable or satellite) versus those with children in their household (56%).*

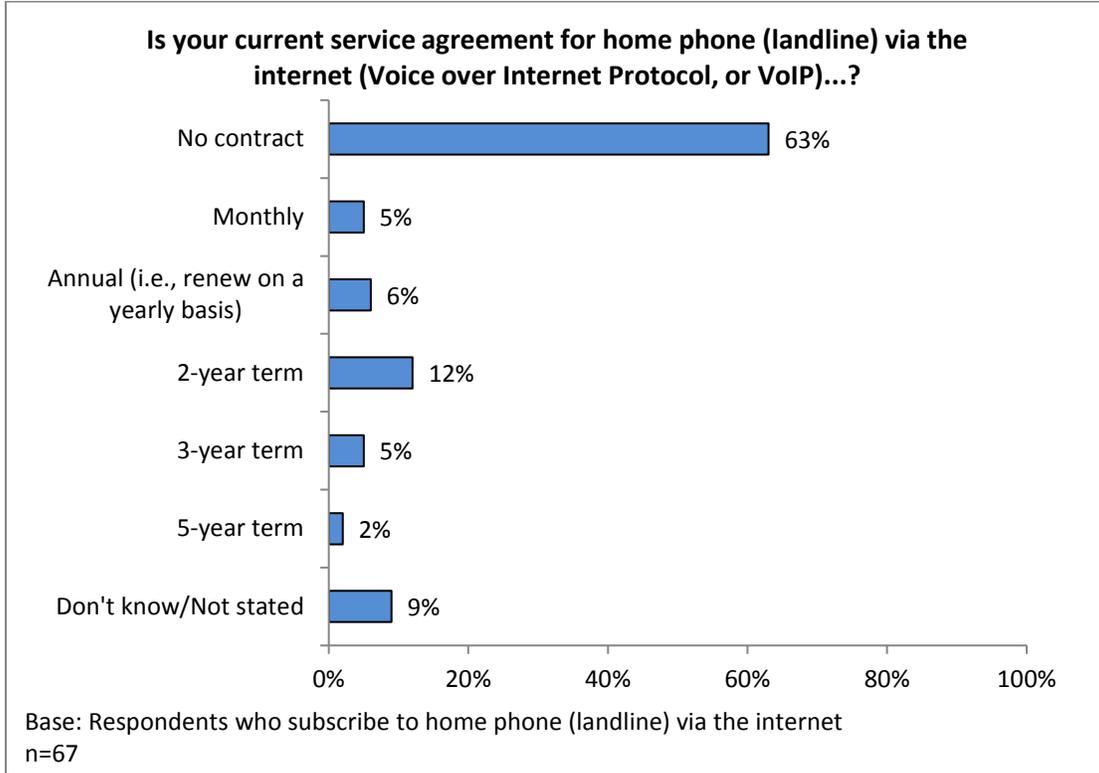
*Those with children in their household (18%) were significantly more likely to have a service agreement for a **2-year term** for TV (cable or satellite) versus those without children in their household (8%).*

*Respondent subgroups who were significantly more likely to have a service agreement for a **3-year term** for TV (cable or satellite) included the following:*

- *Males (9%) versus females (3%); and*
- *Those aged 35 to 54 (9%) versus those aged 65 or older (3%).*

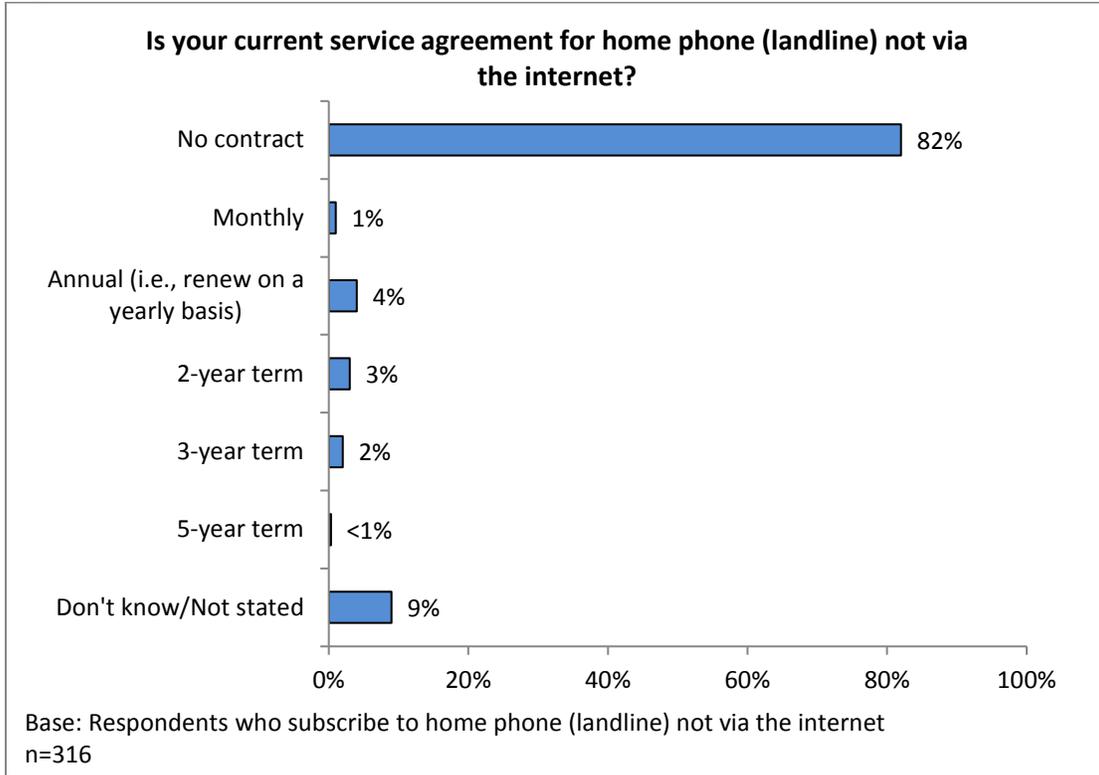
Those who subscribed to home phone (landline) via the internet (Voice over Internet Protocol, or VoIP) (n=67) most commonly had no contract (63%) See Figure 10, below.

Figure 10



Those who subscribed to home phone (landline) not via the internet (n=316) most commonly had no contract (82%). See Figure 11, below.

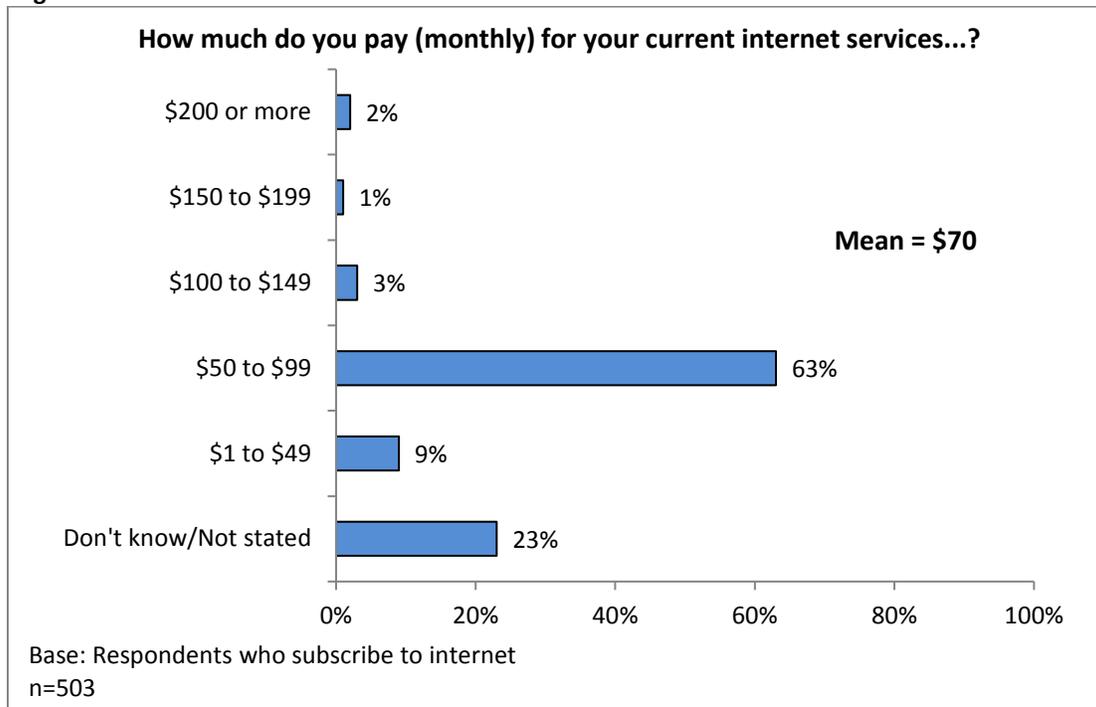
Figure 11



For each service that respondents subscribed to, they were asked to indicate how much they pay (monthly) for their services.

For internet services, respondents (n=503) most commonly paid \$50 to \$99 (63%) per month, with a mean of \$70. Twenty-three percent of respondents (23%) did not know or did not provide an answer. See Figure 12, below.

Figure 12

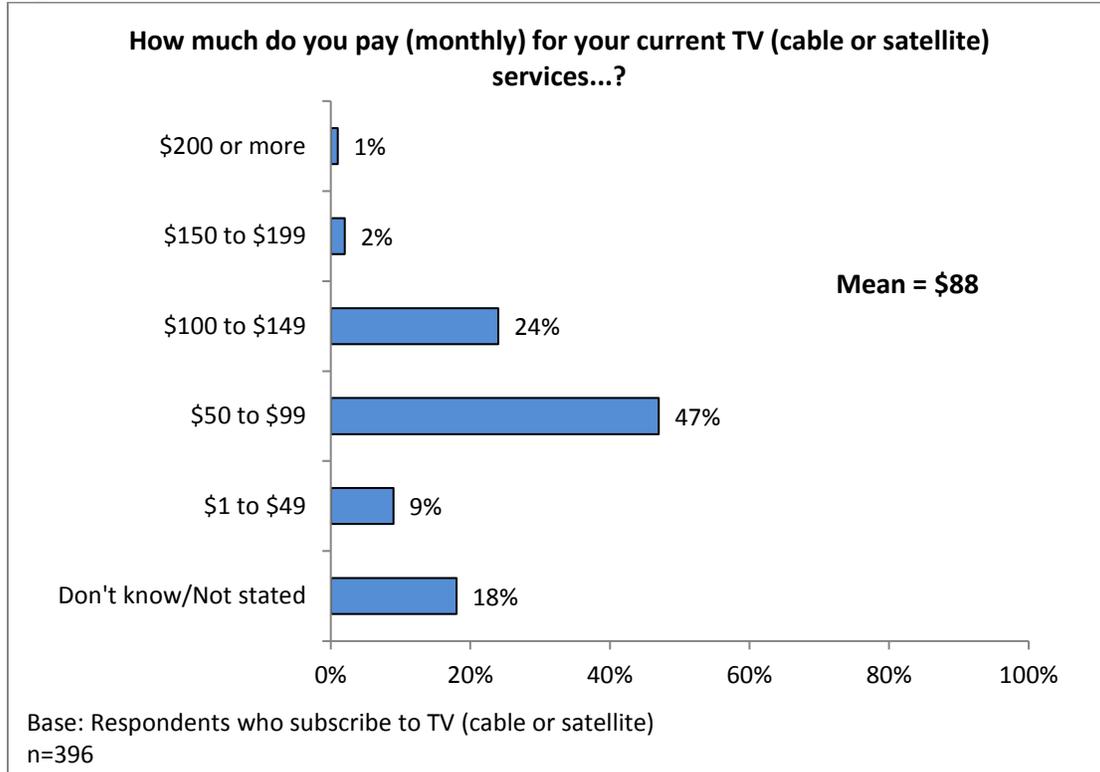


Selected Sub-segment Findings

- *Commercial property respondents (\$91), on average, paid more for internet services per month, versus residential respondents (\$66).*
- *Those aged 18 to 24 (\$78), 25 to 34 (\$72), and 35 to 54 (\$72) on average, paid more for internet services per month, versus those aged 55 to 64 (\$61) and 65 and older (\$59).*
- *Those with children in their household (\$76), on average, paid more for internet services per month, versus those without children in their household (\$63).*
- *Businesses with 10 or more employees (\$109), on average, paid more for internet services per month, versus businesses with 1 to 9 employees (\$89).*
- *Businesses operating in Sundre for 21 or more years (\$105) and 11 to 20 years (\$99), on average, paid more for internet services per month, versus businesses operating in Sundre for 10 years or less (\$83).*

For TV (cable or satellite) services, respondents (n=396) most commonly paid \$50 to \$99 (47%) monthly, with a mean of \$88. See Figure 13, below.

Figure 13

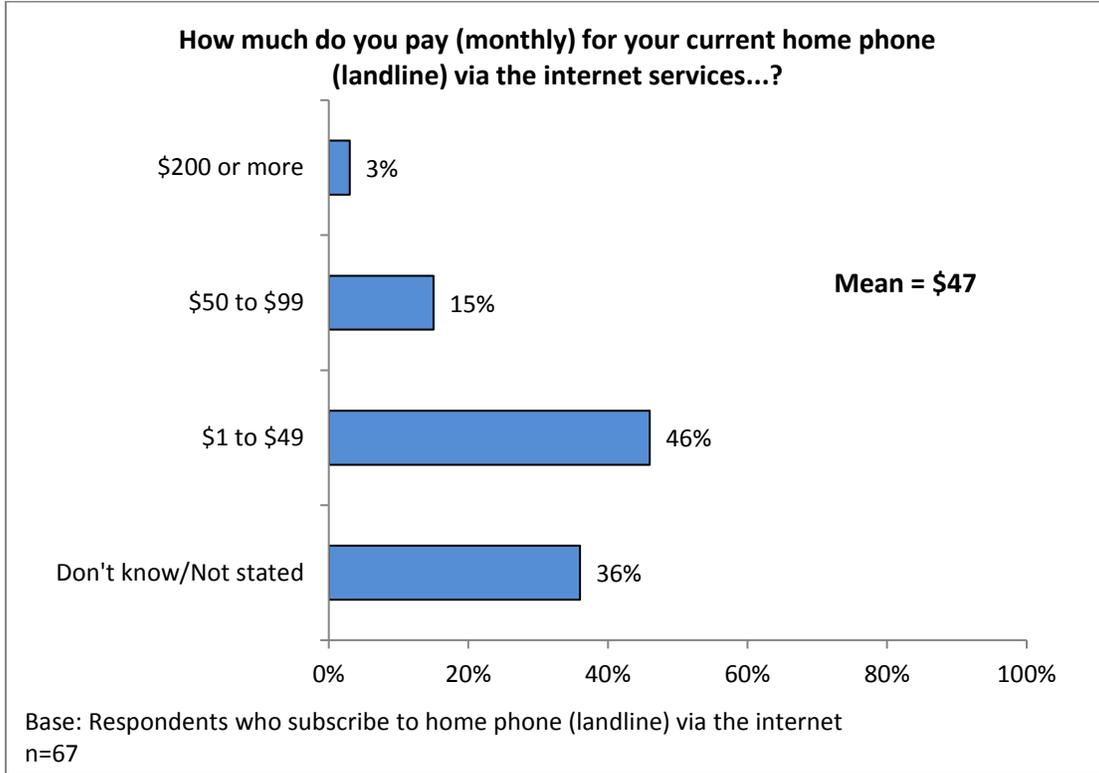


Selected Sub-segment Findings

- Commercial property respondents (\$168), on average, paid more for TV (cable or satellite) services per month, versus residential property respondents (\$85).
- Those aged 25 to 34 (\$98), and 35 to 54 (\$91) on average, paid more for internet services per month, versus those aged 55 to 64 (\$83) and 65 and older (\$78).
- Those with children in their household (\$91), on average, paid more for internet services per month, versus those without children in their household (\$83).

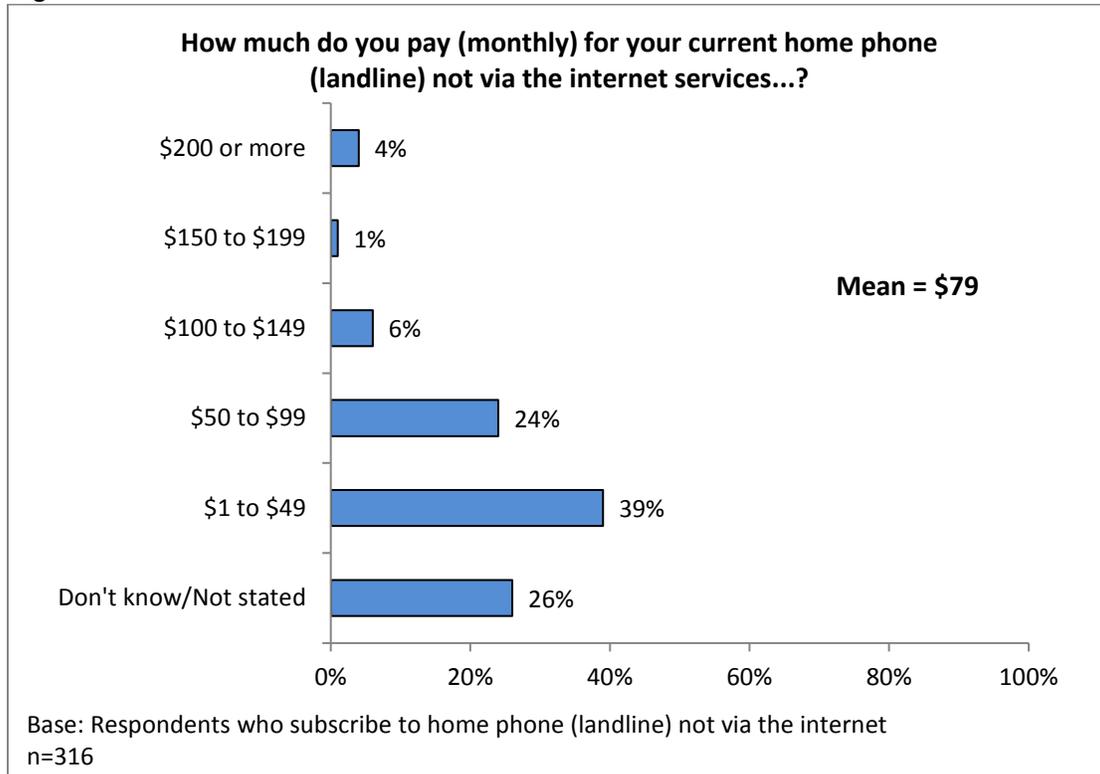
For home phone (landline) via the internet services, respondents (n=67) most commonly paid \$1 to \$49 (46%) per month, with a mean of \$47. See Figure 14, below.

Figure 14



Respondents (n=316) most commonly paid \$1 to \$49 (39%) per month, followed by \$50 to \$99 (24%) for home phone (landline) not via the internet services, with a mean of \$79. See Figure 15, below.

Figure 15

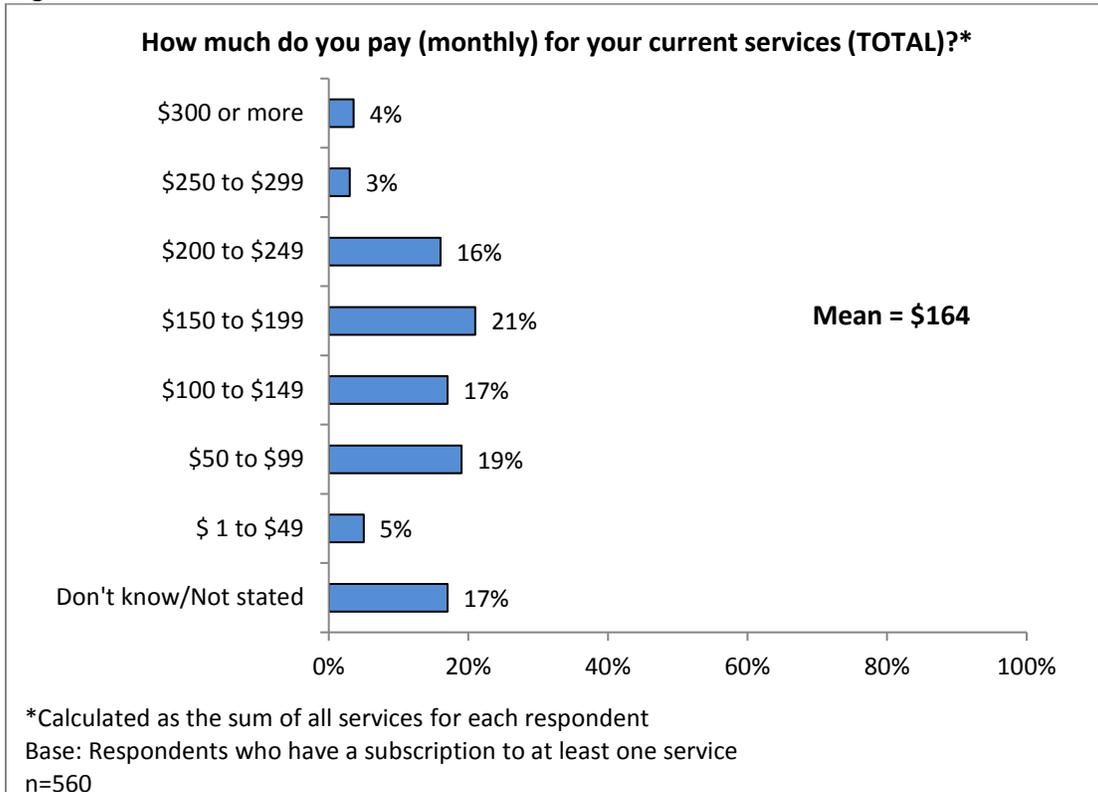


Selected Sub-segment Findings

Commercial property respondents (\$231), on average, paid more for home phone (landline) not via the internet services per month, versus residential respondents (\$49).

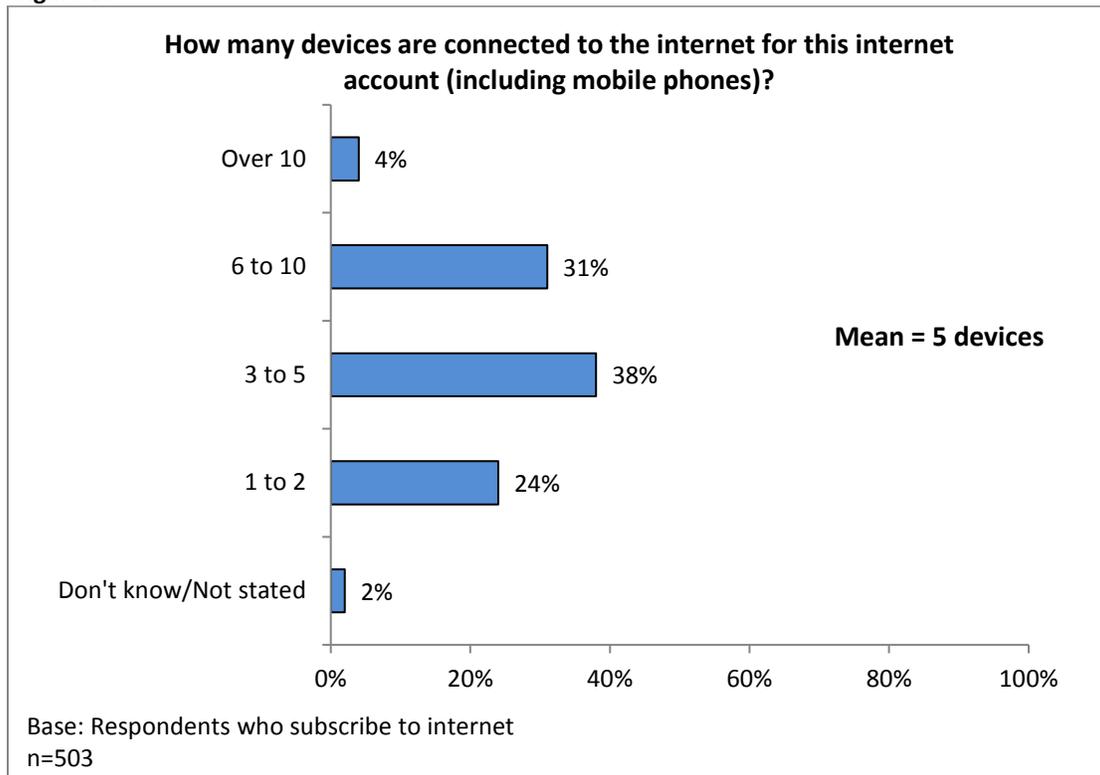
Respondents who subscribed to at least one service (n=560) most commonly paid \$150 to \$199 (21%) in **total** for their telecommunications services, including internet, TV (cable or satellite), home phone (landline) via the internet, and home phone (landline) not via the internet. On average, respondents paid \$164 in total for their services. See Figure 16, below.

Figure 16



Respondents who subscribed to internet (n=503) were then asked how many devices were connected to their internet account (including mobile phones). Most commonly, respondents indicated that there were 3 to 5 devices (38%) connected to their internet account, with a mean of 5 devices. See Figure 17, below.

Figure 17



Sub-Segment Findings

Respondent subgroups who were significantly more likely to have **1 or 2 devices** connected to the internet included the following:

- Those aged 55 to 64 (37%) and 65 years or older (39%) versus those aged 35 to 54 (10%) and 25 to 34 (4%); and
- Those without children (29%) versus those with children (4%).

Those aged 25 to 34 (57%) and 65 years or older (44%) were significantly more likely to have **3 to 5 devices** versus those aged 35 to 54 (30%).

Respondent subgroups who were significantly more likely to have **6 or 10 devices** connected to the internet included the following:

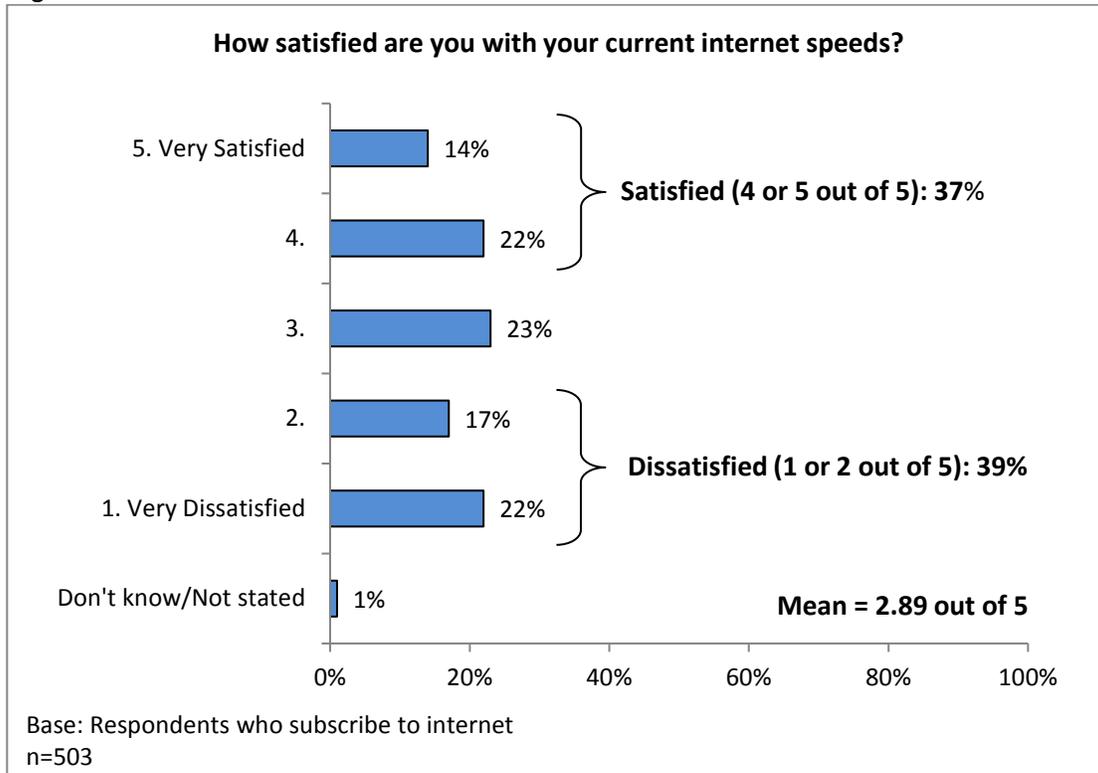
- Those aged 35 to 54 (54%) versus those aged 25 to 34 (33%), 55 to 64 (21%), and 65 or older (11%); and
- Those with children (53%) versus those without children (26%).

Respondent subgroups who were significantly more likely to have **over 10 devices** connected to the internet included the following:

- Commercial property owners (12%) versus residential property owners (3%); and
- Commercial property respondents (10%) versus residential property respondents (3%); and
- Those with children (7%) versus those without children (1%).

Respondents who subscribed to the internet (n=503) were then asked how satisfied they were with their current internet speeds. Thirty-seven percent (37%) of respondents were satisfied (ratings of 4 or 5 out of 5), 23% were neutral (ratings of 3 out of 5), and 39% were dissatisfied (ratings of 1 or 2 out of 5) with their current internet speeds. Respondents provided an average rating of 2.89 out of 5. See Figure 18, below.

Figure 18



Sub-Segment Findings

Respondent subgroups who were significantly more likely to be satisfied (ratings of 4 or 5 out of 5) with their **current internet speeds** included the following:

- Females (42%) versus males (31%);
- Those aged 65 or older (51%) versus those aged 55 to 64 (35%), 35 to 54 (29%), and 25 to 34 (22%); and
- Those without children in their household (42%) versus those with children in their household (20%).

4.3 Information on Broadband Fibre Optic Network Infrastructure

Respondents were then provided with the following information, with details regarding broadband fibre optic network infrastructure and the Town's proposals to provide this service to residents and businesses:

"Fibre optics are a type of communications infrastructure that allow for internet download and upload speeds of up to 1 Gigabit per second, and increased consumer choice for TV and phone services. The Town of Sundre is now in the public consultation phase of their pursuit of fibre-optics, to determine the following:

- 1) the market demand for improved broadband services; and*
- 2) the public appetite to spend public dollars on such a network*

The Town of Sundre has narrowed down the potential development of a Broadband Network to two (2) operational models:

Option A – Publicly-owned Wholesale Broadband Network

This option would require approximately \$2.75 million in capital spent over four years. To generate revenue, it would involve selling access to the network to private internet service providers (ISPs).

The potential benefits associated with this option are the following:

- i. If penetration targets are met, it will enable future Councils to utilize the profits generated from the network for the betterment of the community;*
- ii. The network would remain an asset of, and in strategic control of the Town and community;*
- iii. Millions of dollars in capital would not leave the community.*

No tax increase would be required if penetration targets are met within 4 years, since the deployment would rely on debenture borrowing and existing reserves.

The risks are the following:

- a) If penetration targets are not met in under 5 years, then tax increases might be required to cover the cost of operations and debt repayment;*
- b) The cost to borrow could impact the borrowing limit required for future projects.*

Option B – Invite Private Company to Install Wholesale Broadband Network

This option would involve inviting a private company to install a broadband network in Sundre, using absolutely no tax dollars. The network would not be guaranteed and would be installed at a time and choosing of a company's choice.

The benefits of such a model would be the following:

- a) There would be no tax dollars used, and therefore absolutely no risk.*

The downsides associated with this model are the following:

- a) There would be absolutely zero dollars contributed to the municipality;*
- b) Strategic control of the network would remain outside of the municipality;*
- c) Millions of dollars in capital would leave the region;*
- d) Deployment by a private company could be years away.*

There would be many potential benefits to Sundre citizens, businesses, and social institutions with either option. Please visit SundreBroadband.com for a description of the many benefits of broadband infrastructure.

Based on existing rates in nearby markets, the expected monthly service fee would be in the range of \$150 for a combined bundle consisting of high-speed internet, TV and phone services for home customers. Internet-alone service could be as low as \$90 per month."

4.4 Overall Support for Broadband Fibre Optic Network Infrastructure

Respondents were then asked, overall, how strongly they support the Town of Sundre pursuing broadband fibre optic network infrastructure. Seventy-five percent (75%) of respondents (77% of residential properties; 65% of commercial properties) indicated that they either “strongly support” (52%), or “somewhat support” (23%) the Town’s efforts, while 19% (16% of residential properties; 30% of commercial properties) indicated that they either “somewhat oppose” (8%) or “strongly oppose” (11%) the Town’s efforts. See Figure 19, below, and Figure 20, on the following page for detailed results.

Figure 19

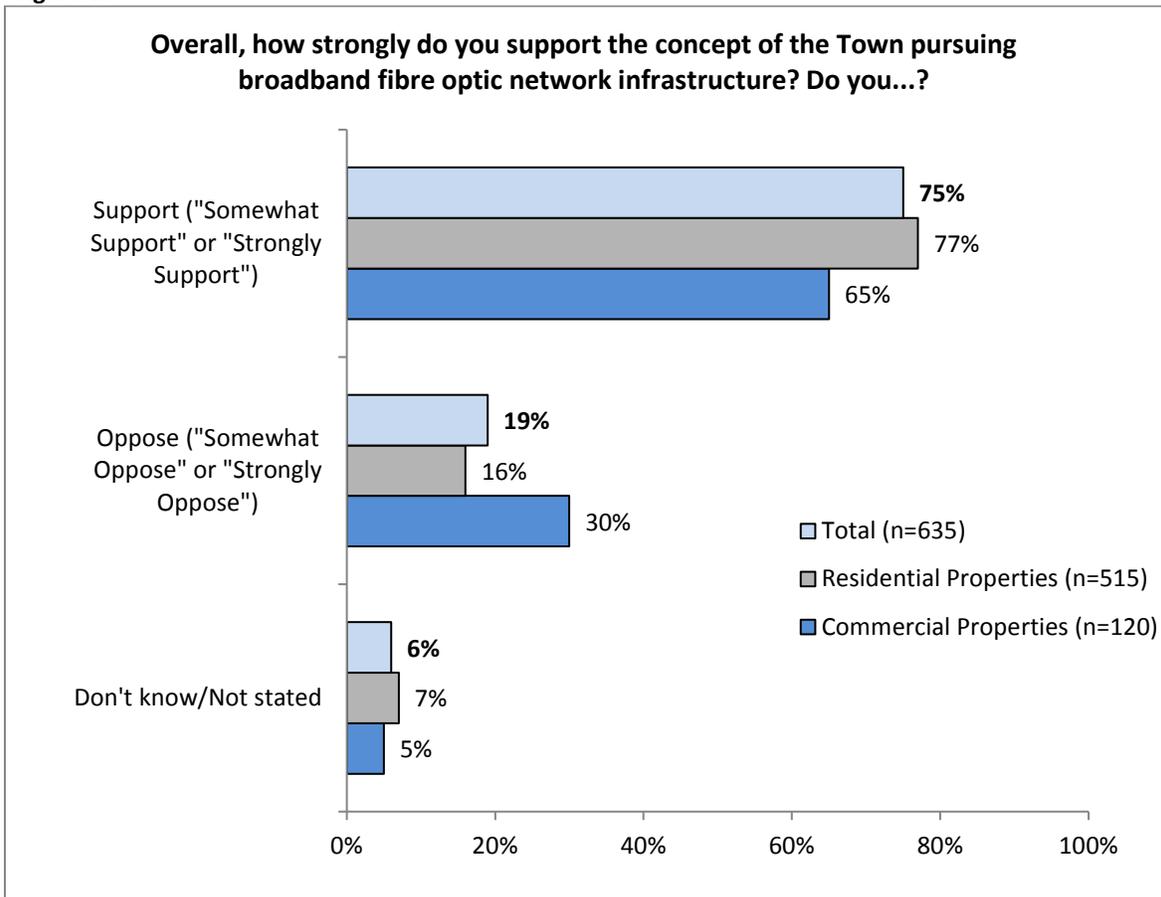
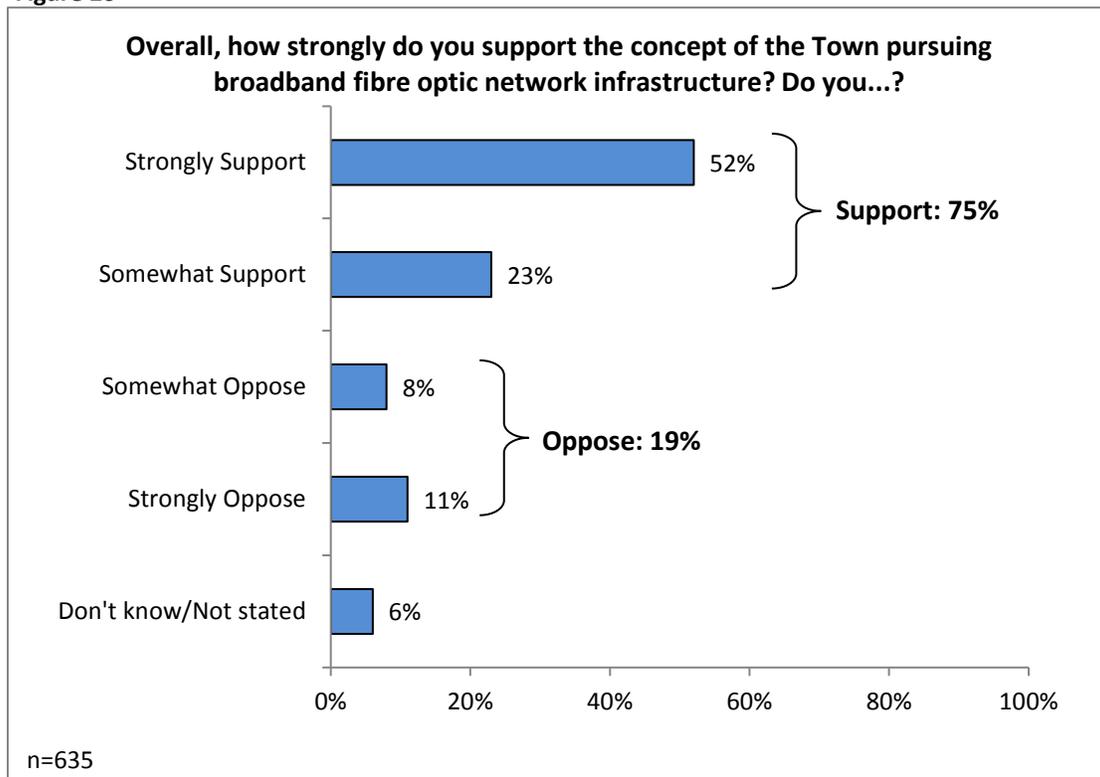


Figure 20



Sub-Segment Findings

Respondent subgroups who were significantly *more likely* to be **support** the Town pursuing broadband fibre optic network infrastructure included the following:

- Residential property owners (76%) and residential property renters (90%) versus commercial property owners (66%);
- Residential property respondents (77%) versus commercial property respondents (65%);
- Those aged 25 to 34 (85%) and 35 to 54 (85%) versus those aged 55 to 64 (69%); and
- Business properties who have operated in Sundre for 11 to 20 years (82%) versus those who have operated in Sundre for 10 years or less (50%).

Respondents who indicated that they either “strongly support” or “somewhat support” the concept of broadband fibre optic network infrastructure in the Town of Sundre (n=475) were asked why the support the concept. Most commonly, respondents indicated access to faster and/or better internet services and/or speeds (33%), followed by the benefits it would have for Town growth (in general) (19%). See Table 3, below, for a detailed list of responses.

Table 3

Why do you support the concept of broadband fibre optic network infrastructure in the Town of Sundre?	
Base: Respondents who support (“strongly support” or “somewhat support”) the concept of broadband fibre optic network infrastructure.	Percent of Respondents* (n=475)
Access to faster/better/more reliable internet services/speeds	33
Will be good/beneficial for Town/future of Town/Town growth (in general)	19
Is a good revenue source/good for local economy/money is put into Town/community	15
Access to internet/current internet services are lacking/poor/unavailable	12
Is a needed/required/essential service (in general)	11
Will benefit/help local businesses/services/business owners	9
Need to keep up with technology/advances in technology (in general)	9
Lower cost/will save money/cost less	8
Will attract/bring in more businesses/commercial development	6
Gives residents more options/choices (in general)	3
Other (1% or less)	2
Don't know/Not stated	2

***Multiple responses**

Respondents who indicated opposition for the concept of broadband fibre optic network infrastructure in Sundre (“strongly oppose” or “somewhat oppose”) (n=120) were asked why they oppose the concept. Respondents most commonly mentioned cost and/or tax increase related concerns (48%), followed by satisfaction with their current service provider (15%). See Table 4, below.

Table 4

Why do you oppose the concept of broadband fibre optic network infrastructure in the Town of Sundre?	
Base: Respondents who oppose (“strongly oppose” or “somewhat oppose”) the concept of broadband fibre optic network infrastructure.	Percent of Respondents* (n=120)
Cost/tax increase related concerns	48
I am satisfied with my current service provider	15
There are more important projects/priorities/issues for Town to focus on	10
I do not need/am not interested in this service	8
Should not be funded with tax dollars/should be optional/a user pay system	8
Town should not get involved in managing this kind of project (in general)	6
I need more information/do not know enough about this	3
Town is poorly run/managed	2
There is too much risk involved/concept is too risky (in general)	2
Is not needed/should not be an area of focus (in general)	2
Is a bad/poor idea (in general)	2
Don't know/Not stated	3

***Multiple responses**

Respondents were then provided with a series of statements regarding broadband fibre optic network infrastructure in the Town of Sundre, and asked to rate their agreement using a scale of 1 to 5, where 1 meant “strongly disagree” and 5 meant “strongly agree.” Detailed responses are provided in Table 5, on the following page. Statements garnering agreement (ratings of 4 or 5 out of 5) of over 60% included:

- “Broadband fibre optic network infrastructure will make the Town more attractive to potential businesses” (72% agreed);
- “The Town should be proactive by pursuing broadband fibre optic network infrastructure for its residents and businesses” (69%);
- “There is a need in the Town of Sundre for improved internet service” (68%);
- “Broadband fibre optic network infrastructure will make the Town more attractive to potential residents” (67%); and
- “There is a need in the Town of Sundre for improved telecommunications competition” (65%).

Least commonly, respondents (commercial property respondents only; n=120) agreed with the statement “Broadband fibre optic network infrastructure will improve the competitiveness of my business” (43% agreed). See Figure 21, below.

Figure 21

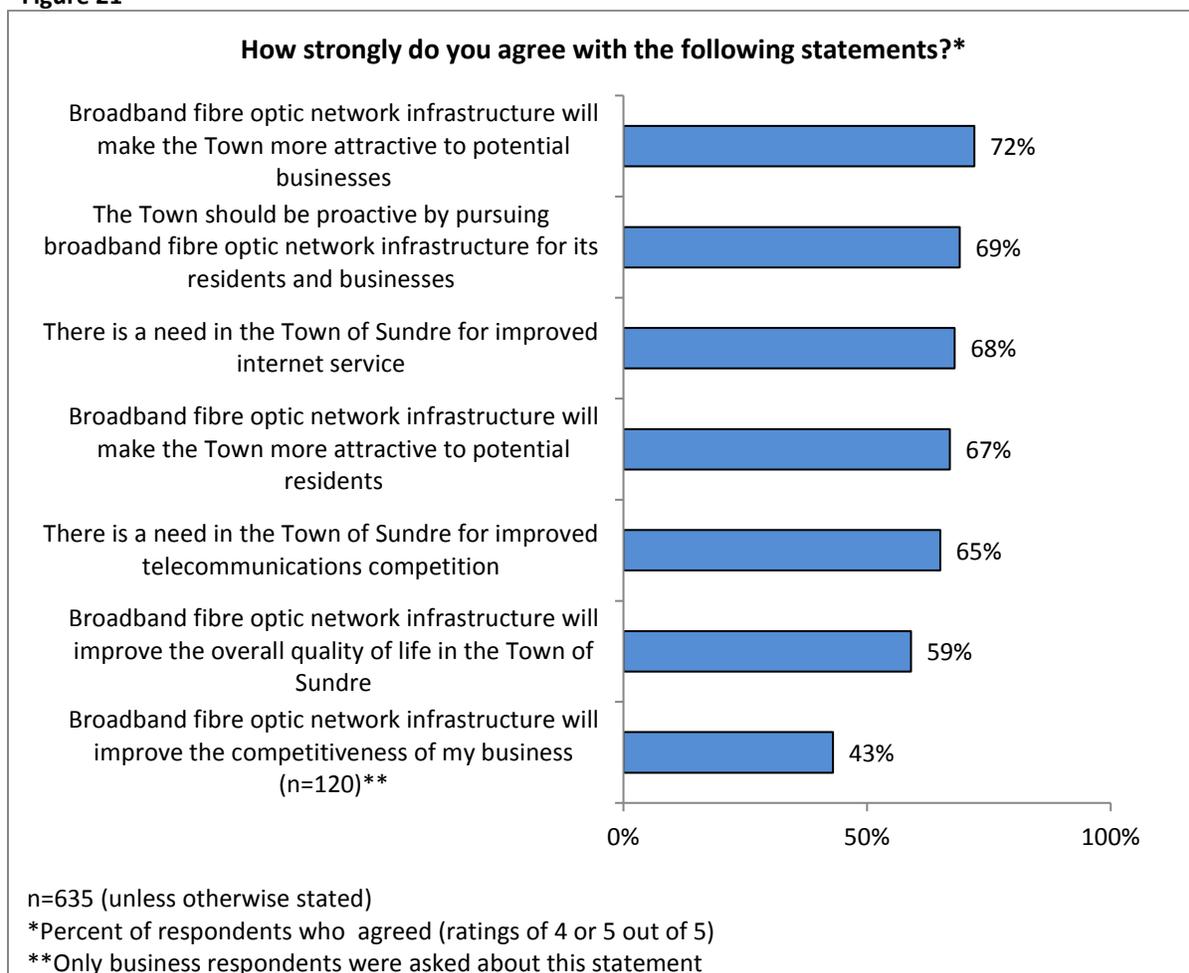


Table 5

How strongly do you agree with the following statements?								
	Percent of Respondents (n=635)*							
	(1) Strongly Disagree	(2)	(3)	(4)	(5) Strongly Agree	Don't know/ Not stated	Not Applicable	Mean (out of 5)
Broadband fibre optic network infrastructure will make the Town more attractive to potential businesses	7	5	10	19	53	5	1	4.12
There is a need in the Town of Sundre for improved internet service	6	6	14	15	54	6	<1	4.10
The Town should be proactive by pursuing broadband fibre optic network infrastructure for its residents and businesses	8	7	12	20	49	4	1	3.99
Broadband fibre optic network infrastructure will make the Town more attractive to potential residents	9	8	12	19	49	4	<1	3.95
There is a need in the Town of Sundre for improved telecommunications competition	8	7	14	20	44	7	<1	3.93
Broadband fibre optic network infrastructure will improve the quality of life in the Town of Sundre	10	10	17	25	34	4	<1	3.67
Broadband fibre optic network infrastructure will improve the competitiveness of my business (n=120)	19	11	23	8	35	2	3	3.30

*Unless otherwise stated

Sub-Segment Findings

Respondent subgroups who were significantly more likely to agree (ratings of 4 or 5 out of 5) that **“There is a need in the Town of Sundre for improved internet service”** included the following:

- Residential property owners (70%) and residential property renters (85%) versus commercial property owners (55%);
- Residential property respondents (72%) versus commercial property respondents (55%);
- Those aged 25 to 34 (83%) and 35 to 54 (80%) versus those aged 65 or older (60%); and
- Those with children (83%) versus those without children (70%).

Respondent subgroups who were significantly more likely to agree (ratings of 4 or 5 out of 5) that **“There is a need in the Town of Sundre for improved telecommunications competition”** included the following:

- Residential property renters (82%) versus residential property owners (65%) and commercial property owners (60%);
- Those aged 35 to 54 (73%) versus those aged 65 or older (58%);
- Those with children in their household (76%) versus those without children in their household (65%); and
- Business properties who have operated in Sundre for 11 to 20 years (78%) versus 10 years or less (46%).

Respondent subgroups who were significantly more likely to agree (ratings of 4 or 5 out of 5) that **“The Town should be proactive by pursuing broadband fibre optic network infrastructure for its residents and businesses”** included the following:

- Males (74%) versus females (66%);
- Those aged 25 to 34 (81%) and 35 to 54 (79%) versus those aged 55 to 64 (64%) and 65 or older (62%);
- Those with children in their household (80%) versus those without children in their household (69%); and
- Business properties who have operated in Sundre for 11 to 20 years (82%) versus 10 years or less (57%).

Respondent subgroups who were significantly more likely to agree (ratings of 4 or 5 out of 5) that **“Broadband fibre optic network infrastructure will make the Town more attractive to potential residents”** included the following:

- Males (73%) versus females (63%);
- Those aged 35 to 54 (75%) versus those aged 55 to 64 (61%) and 65 or older (64%);
- Those with children in their household (76%) versus those without children in their household (66%); and
- Business properties who have operated in Sundre for 11 to 20 years (84%) versus 10 years or less (55%).

Respondent subgroups who were significantly more likely to agree (ratings of 4 or 5 out of 5) that **“Broadband fibre optic network infrastructure will make the Town more attractive to potential businesses”** included the following:

- Those aged 35 to 54 (79%) versus those aged 55 to 64 (67%); and
- Business properties who have operated in Sundre for 11 to 20 years (84%) versus 10 years or less (57%).

Respondent subgroups who were significantly more likely to agree (ratings of 4 or 5 out of 5) that **“Broadband fibre optic infrastructure will improve the overall quality of life in the Town of Sundre”** included the following:

- Residential property owners (61%) versus commercial property owners (45%);
- Residential property respondents (61%) versus commercial property respondents (51%);
- Males (64%) versus females (56%); and
- Business properties who have operated in Sundre for 11 to 20 years (64%) versus 10 years or less (43%).

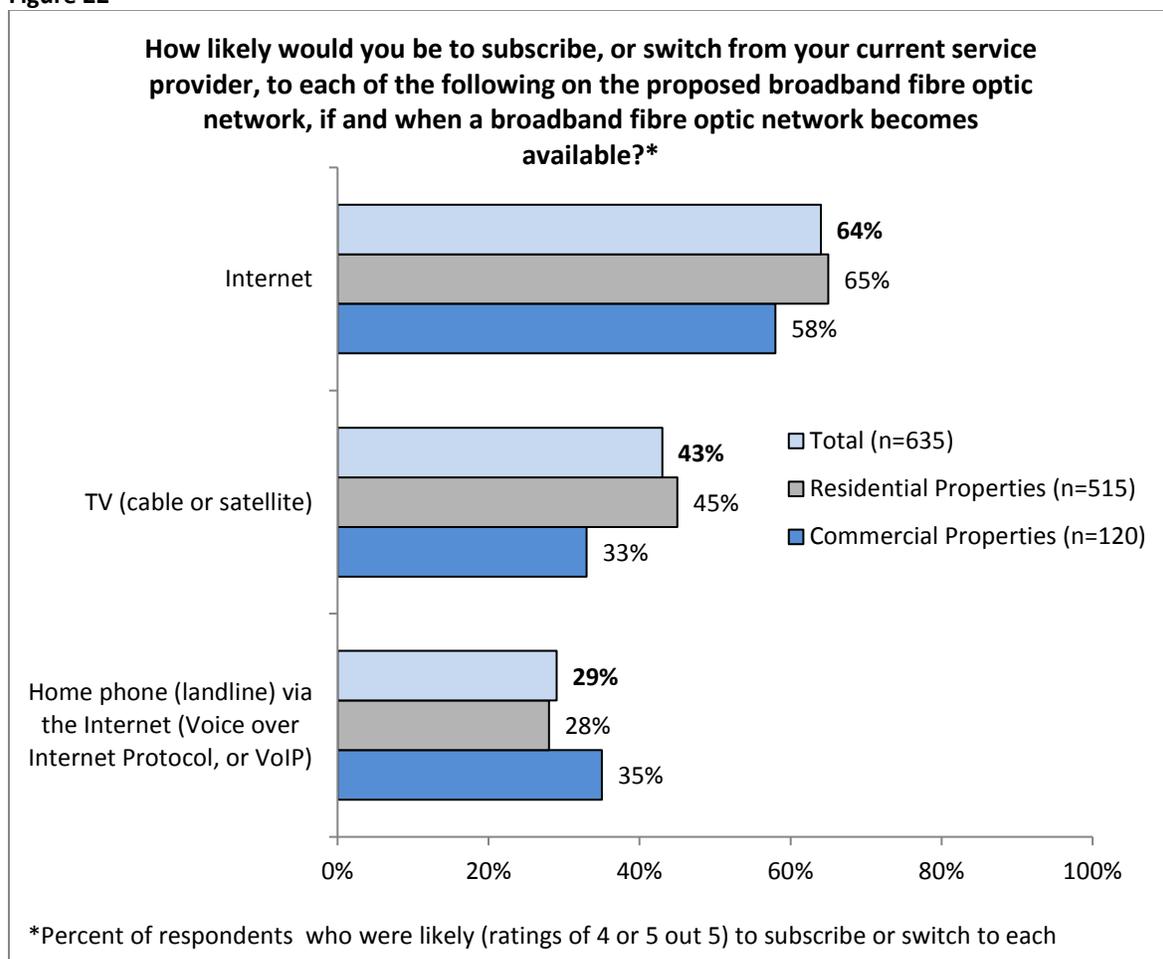
Businesses operating in Sundre for 11 to 20 years (62%) were significantly more likely to agree (ratings of 4 or 5 out of 5) with the statement **“Broadband fibre optic network infrastructure will improve the competitiveness of my business”** versus businesses operating in Sundre for 10 years or less (34%).

4.5 Likelihood of Subscribing to Services

Respondents were then asked how likely they would be to subscribe, or switch from their current service provider, to internet, TV (cable or satellite), and home phone (landline) via the internet (Voice over Internet Protocol) on the proposed broadband fibre optic network, if and when it becomes available. See Figure 22, below, for a summary of responses, and Figures 23 to 25 on pages 47 to 49 for a detailed breakdown of each service.

- Sixty-four percent of respondents (64%) were likely (ratings of 4 or 5 out of 5) to switch, or subscribe to **internet** (65% of residential properties; 58% of commercial properties);
- Forty-three percent (43%) were likely to switch, or subscribe to **TV (cable or satellite)** (45% of residential properties; 33% of commercial properties); and
- Twenty-nine percent (29%) were likely to switch, or subscribe to **home phone (landline) via the internet (Voice over Internet Protocol, or VoIP)** (28% of residential properties; 35% of commercial properties).

Figure 22



Sub-Segment Findings

Respondent subgroups who were significantly more likely to be **likely (ratings of 4 or 5 out of 5)** to subscribe, or switch from their current service provider to **internet** on the proposed broadband fibre optic network if and when a broadband fibre optic network becomes available included the following:

- Those who were likely (ratings of 4 or 5 out of 5) (92%) to subscribe to **TV (cable or satellite)** on the proposed broadband fibre optic network versus those who were unlikely (ratings of 1 to 3 out of 5) (41%);
- Those who were likely (ratings of 4 or 5 out of 5) (97%) to subscribe to **home phone (landline) via the internet** on the proposed broadband fibre optic network versus those who were unlikely (ratings of 1 to 3 out of 5) (50%);
- Residential property renters (77%) versus commercial property owners (58%);
- Those aged 25 to 34 (79%) and 35 to 54 (73%) versus those aged 55 to 64 (63%) and 65 or older (54%);
- Those with children (77%) versus those without children (64%); and
- Business properties who have operated in Sundre for 11 to 20 years (80%) versus 10 years or less (43%).

Respondent subgroups who were significantly more likely to be **likely (ratings of 4 or 5 out of 5)** to subscribe, or switch from their current service provider to **TV (cable or satellite)** on the proposed broadband fibre optic network if and when a broadband fibre optic network becomes available included the following:

- Those who were likely (ratings of 4 or 5 out of 5) (62%) to subscribe to **internet** on the proposed broadband fibre optic network versus those who were unlikely (ratings of 1 to 3 out of 5) (8%);
- Those who were likely (ratings of 4 or 5 out of 5) (80%) to subscribe to **home phone (landline) via the internet** on the proposed broadband fibre optic network versus those who were unlikely (ratings of 1 to 3 out of 5) (27%);
- Residential property owners (45%) and residential property renters (51%) versus commercial property owners (32%); and
- Residential property respondents (45%) versus commercial property respondents (33%).

Respondent subgroups who were significantly more likely to be **likely (ratings of 4 or 5 out of 5)** to subscribe, or switch from their current service provider to **home phone (landline) via the internet (Voice over Internet Protocol, or VoIP)** on the proposed broadband fibre optic network if and when a broadband fibre optic network becomes available included the following:

- Those who were likely (ratings of 4 or 5 out of 5) (44%) to subscribe to **internet** on the proposed broadband fibre optic network versus those who were unlikely (ratings of 1 to 3 out of 5) (3%);
- Those who were likely (ratings of 4 or 5 out of 5) (55%) to subscribe to **TV (cable or satellite)** on the proposed broadband fibre optic network versus those who were unlikely (ratings of 1 to 3 out of 5) (11%);
- Commercial property owners (41%) versus residential property owners (27%); and
- Business properties who have operated in Sundre for 11 to 20 years (53%) versus 10 years or less (27%).

Figure 23

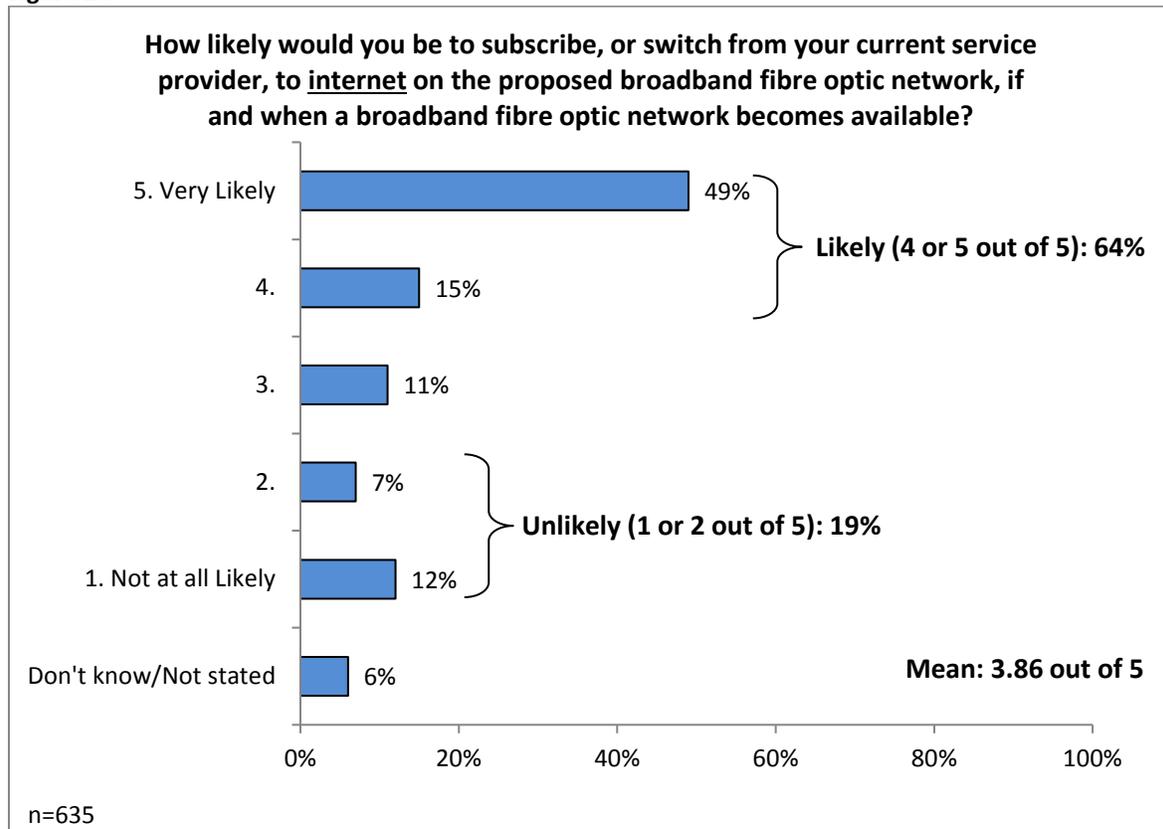


Table 6, below, shows a breakdown of respondent likelihood of subscribing to internet on the proposed broadband fibre optic network, by the respondents' current service agreement for internet. Sixty-six percent (66%) of those who were likely (ratings of 4 or 5 out of 5) to subscribe (n=339) are not currently on a service agreement contract for internet.

Table 6

How likely would you be to subscribe, or switch from your current service provider, to <u>internet</u> on the proposed broadband fibre optic network if and when a broadband fibre optic network becomes available?						
Base: Respondents who subscribe to internet	Percent of Respondents					
	Current Service Agreement (Internet)					
	No Contract	Annual	2-year term	3-year term	Other	Don't know/Not stated
Likely (ratings of 4 or 5 out of 5) (n=339)	66	6	13	4	2	10
Neutral (ratings of 3 out of 5) (n=63)	65	8	10	6	-	11
Unlikely (ratings of 1 or 2 out of 5) (n=81)	67	12	14	4	1	2
Don't know/Not stated (n=20)	80	5	5	-	5	5

Figure 24

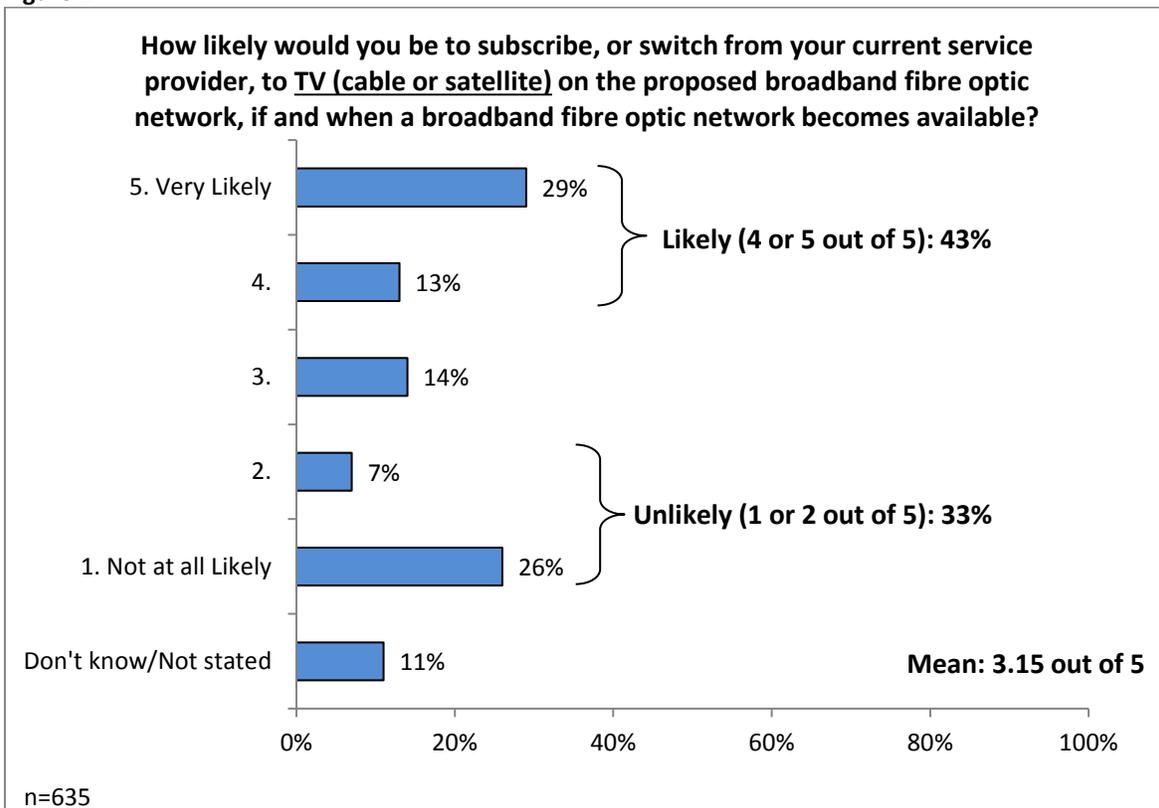


Table 7, below, shows a breakdown of respondent likelihood of subscribing to TV (cable or satellite), by the respondents' current service agreement for TV (cable or satellite). Sixty-three percent (63%) of those who were likely (ratings of 4 or 5 out of 5) to subscribe to TV (cable or satellite) on the proposed broadband fibre optic network (n=213) are not currently on a service agreement contract for TV (cable or satellite).

Table 7

How likely would you be to subscribe, or switch from your current service provider, to TV (cable or satellite) on the proposed broadband fibre optic network if and when a broadband fibre optic network becomes available?						
Base: Respondents who subscribe to TV (cable or satellite)	Percent of Respondents					
	Current Service Agreement (TV (cable or satellite))					
	No Contract	Annual	2-year term	3-year term	Other	Don't know/Not stated
Likely (4 or 5 out of 5) (n=213)	63	7	10	8	3	8
Neutral (3 out of 5) (n=68)	63	3	13	9	-	12
Unlikely (1 or 2 out of 5) (n=89)	82	7	7	2	-	2
Don't know/Not stated (n=26)	69	4	8	4	8	8

Figure 25

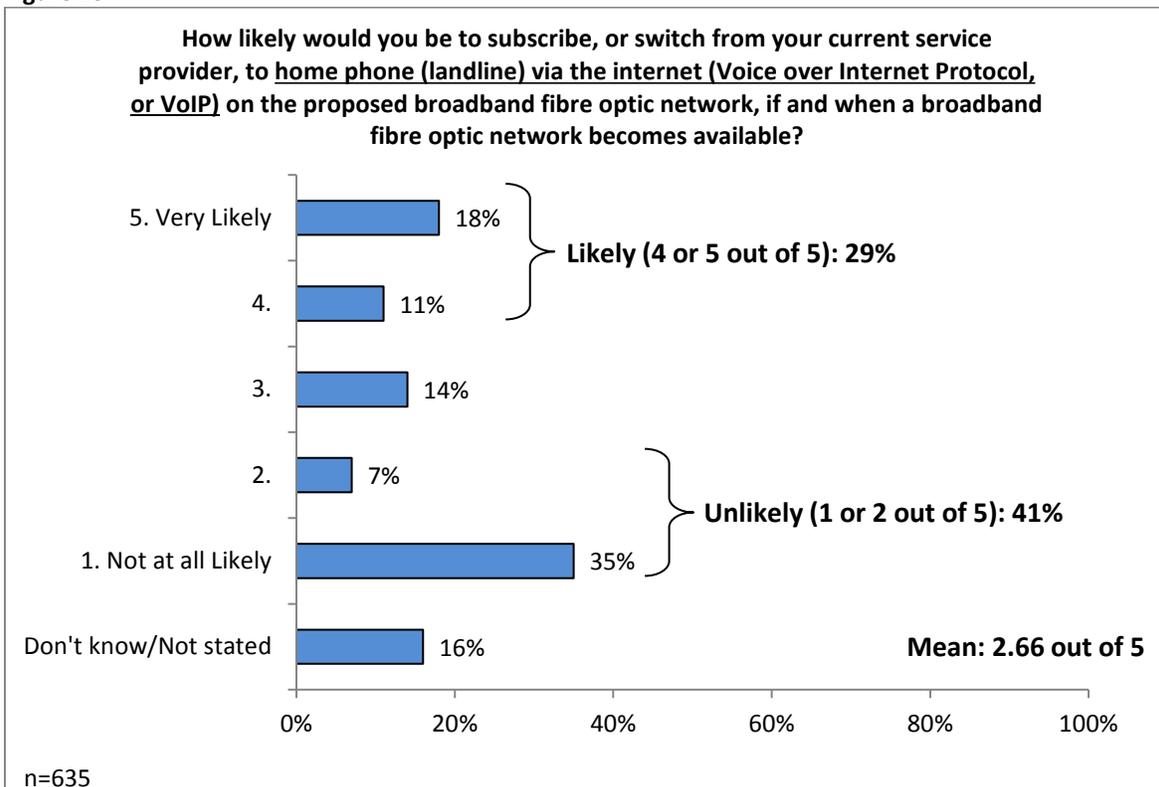


Table 8, below, shows a breakdown of respondent likelihood of subscribing to home phone (landline) via the internet (Voice over Internet Protocol, or VoIP), by the respondents' current service agreement for home phone (landline) via the internet. Fifty-five percent (55%) of those who were likely (ratings of 4 or 5 out of 5) to subscribe to home phone (landline) via the internet on the proposed broadband fibre optic network (n=31) are not currently on a service agreement contract for home phone (landline) via the internet.

Table 8

How likely would you be to subscribe, or switch from your current service provider, to <u>home phone (landline) via the internet (Voice over Internet Protocol, or VoIP)</u> on the proposed broadband fibre optic network if and when a broadband fibre optic network becomes available?						
Base: Respondents who subscribe to home phone (landline) via the internet	Percent of Respondents					
	Current Service Agreement (Home phone (landline) via the internet (Voice over Internet Protocol, or VoIP))					
	No Contract	Annual	2-year term	3-year term	Other	Don't know/Not stated
Likely (4 or 5 out of 5) (n=31)	55	6	13	6	10	10
Neutral (3 out of 5) (n=8)	50	13	-	13	-	25
Unlikely (1 or 2 out of 5) (n=19)	79	5	16	-	-	-
Don't know/Not stated (n=9)	67	-	11	-	11	11

Respondents who were unlikely (ratings of 1 to 3) to subscribe to internet on the proposed fibre optic network (n=193) most commonly cited service fees and/or charges would be too costly (38%), followed by being satisfied with their current service provider (33%). See Table 9, below.

Table 9

Why wouldn't you be likely to subscribe to <u>internet</u> on the proposed broadband fibre optic network?	
Base: Respondents who were unlikely (1 to 3 out of 5) to subscribe to internet on the proposed broadband fibre optic network.	Percent of Respondents* (n=193)
Service fees/charges/rates too costly/expensive	38
I am satisfied with my current service provider	33
I do not need/am not interested in this service (in general)	17
Depends on what is offered/I need more information/do not know enough about this	8
Cost of infrastructure/tax increase related concerns	1
There are more important projects/priorities/issues for Town to focus on	1
I am contractually bound to stay with my current service provider	1
Don't know/Not stated	5

*Multiple responses

Respondents who were unlikely (ratings of 1 to 3) to subscribe to TV (cable or satellite) (n=297) most commonly mentioned that they do not need or are not interested in the service (in general) (41%), or that they are satisfied with their current service provider (28%). See Table 10, below.

Table 10

Why wouldn't you be likely to subscribe to <u>TV (cable or satellite)</u> on the proposed broadband fibre optic network?	
Base: Respondents who were unlikely (1 to 3 out of 5) to subscribe to TV (cable or satellite) on the proposed broadband fibre optic network.	Percent of Respondents* (n=297)
I do not need/am not interested in this service (in general)	41
I am satisfied with my current service provider	28
Service fees/charges/rates too costly/expensive	16
Depends on what is offered/I need more information/do not know enough about this	11
Cost of infrastructure/tax increase related concerns	<1
I am contractually bound to stay with my current service provider	<1
Don't know/Not stated	5

*Multiple responses

Respondents who were unlikely (ratings of 1 to 3 out of 5) to subscribe to home phone (landline) via the internet (Voice over Internet Protocol, or VoIP) services (n=347) most commonly indicated that they are not interested in this service (in general) (58%). See Table 11, below.

Table 11

Why wouldn't you be likely to subscribe to <u>home phone (landline) via the internet (Voice over Internet Protocol, or VoIP)</u> on the proposed broadband fibre optic network?	
Base: Respondents who were unlikely (1 to 3 out of 5) to subscribe to home phone (landline) via the internet on the proposed broadband fibre optic network.	Percent of Respondents* (n=347)
I do not need/am not interested in this service (in general)	58
I am satisfied with my current service provider	18
Service fees/charges/rates too costly/expensive	11
Depends on what is offered/I need more information/do not know enough about this	8
I am contractually bound to stay with my current service provider	1
Service is poor quality/unreliable/dropped connections	1
There are more important projects/priorities/issues for Town to focus on	<1
Cost of infrastructure/tax increase related concerns	<1
Don't know/Not stated	5

*Multiple responses

Table 12, below, shows the percent of respondents who selected each combination, in terms of subscribing to services on the proposed broadband fibre optic network.

Table 12

How likely would you be to subscribe, or switch from your current service provider, to each of the following on the proposed broadband fibre optic network, if and when a broadband fibre optic network becomes available?*(ADDITIONAL ANALYSIS)	
Respondents who were likely (ratings of 4 or 5 out of 5) to subscribe to...	Percent of Respondents (n=635)
All of internet, TV (cable or satellite), and home phone (landline) via the internet	23
Only internet	19
Only internet and TV (cable or satellite)	16
Only internet and home phone (landline) via the internet	5
Only TV (cable or satellite)	3
Only home phone (landline) via the internet	1
Only TV & home phone (landline) via the internet	<1

Of those who were satisfied (ratings of 4 or 5 out of 5) with their **current internet service provider** (n=226), 49% were likely (ratings of 4 or 5 out of 5) to switch to internet on the proposed broadband fibre optic network, if and when it becomes available. See Table 13, below, for detailed results.

Table 13

How likely would you be to subscribe, or switch from your current service provider, to <u>internet</u> on the proposed broadband fibre optic network if and when a broadband fibre optic network becomes available?			
	Percent of Respondents		
	Satisfaction with Current Internet Service Provider		
	High Satisfaction (4 or 5 out of 5) (n=226)	Moderate Satisfaction (3 out of 5) (n=143)	Low Satisfaction (1 or 2 out of 5) (n=131)
Likely (4 or 5 out of 5)	49	80	86
Neutral (3 out of 5)	15	11	9
Unlikely (1 or 2 out of 5)	31	4	5
Don't know/Not stated	5	6	1

Of those who were satisfied (ratings of 4 or 5 out of 5) with their **current TV (cable or satellite) provider** (n=225), 38% were likely (ratings of 4 or 5 out of 5) to switch to TV (cable or satellite) on the proposed broadband fibre optic network, if and when it becomes available. See Table 14, below, for detailed results.

Table 14

How likely would you be to subscribe, or switch from your current service provider, to <u>TV (cable or satellite)</u> on the proposed broadband fibre optic network if and when a broadband fibre optic network becomes available?			
	Percent of Respondents		
	Satisfaction with Current TV (cable or satellite) Provider		
	High Satisfaction (4 or 5 out of 5) (n=225)	Moderate Satisfaction (3 out of 5) (n=111)	Low Satisfaction (1 or 2 out of 5) (n=58)
Likely (4 or 5 out of 5)	38	75	74
Neutral (3 out of 5)	18	19	10
Unlikely (1 or 2 out of 5)	36	2	12
Don't know/Not stated	8	5	3

Of those who were satisfied (ratings of 4 or 5 out of 5) with their **current home phone (landline) via the internet provider** (n=40), 40% (n=16) were likely (ratings of 4 or 5 out of 5) to switch to home phone (landline) via the internet on the proposed broadband fibre optic network. See Table 15, below, for detailed results.

Table 15

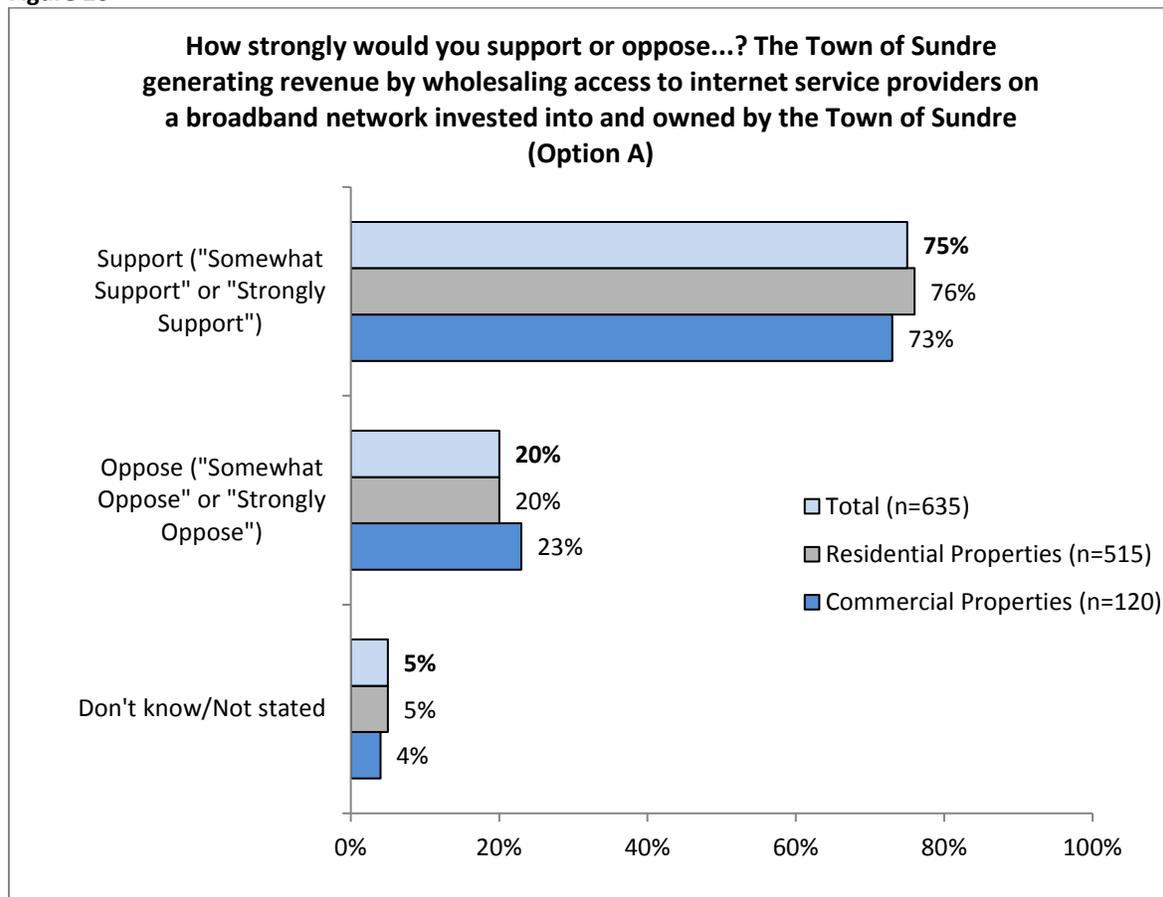
How likely would you be to subscribe, or switch from your current service provider, to <u>home phone (landline) via the internet (Voice over Internet Protocol, or VoIP)</u> on the proposed broadband fibre optic network if and when a broadband fibre optic network becomes available?			
	Number of Respondents		
	Satisfaction with Current Home phone (landline) via the Internet Provider		
	High Satisfaction (4 or 5 out of 5) (n=40)	Moderate Satisfaction (3 out of 5) (n=16*)	Low Satisfaction (1 or 2 out of 5) (n=8*)
Likely (4 or 5 out of 5)	16	9	6
Neutral (3 out of 5)	6	1	-
Unlikely (1 or 2 out of 5)	12	5	2
Don't know/Not stated	6	1	-

***Use caution interpreting results when n<30**

4.6 Model Alternatives

Respondents were then asked how strongly they would support or oppose the Town of Sundre generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre (Option A). Seventy-five percent (75%) of respondents supported (“somewhat support” or “strongly support”) Option A (76% of residential properties; 73% of commercial properties), while 20% opposed (“somewhat oppose” or “strongly oppose”) Option A (20% of residential properties; 23% of commercial properties). See Figure 26, below, and Table 16 on Page 56 for a detailed breakdown of responses.

Figure 26

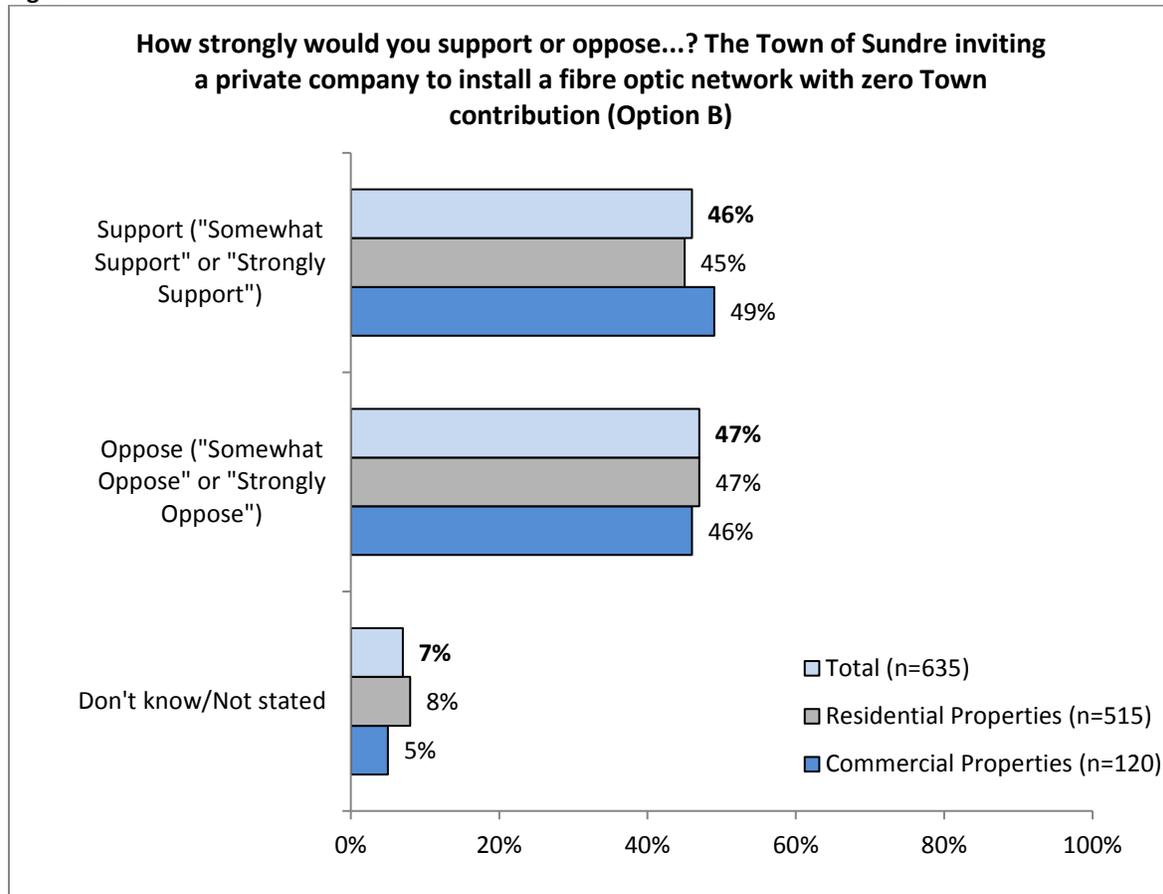


Sub-Segment Findings

Business properties who have operated in Sundre for 11 to 20 years (84%) were significantly more likely to support (“somewhat support” or “strongly support”) Option A (the Town of Sundre generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre) versus business properties who have operated in Sundre for 10 years or less (59%).

Respondents were then asked how strongly they would support or oppose the Town of Sundre inviting a private company to install a fibre optic network with zero Town contribution (Option B). Forty-six percent (46%) of respondents supported (“somewhat support” or “strongly support”) Option B (45% of residential properties; 49% of commercial properties), while 47% opposed (“somewhat oppose” or “strongly oppose”) Option B (47% of residential properties; 46% of commercial properties). See Figure 27, below, and Table 16 on the following page for a detailed breakdown of responses.

Figure 27



Sub-Segment Findings

Business properties who have operated in Sundre for 10 years or less (71%) were significantly more likely to support (“somewhat support” or “strongly support”) Option B (the Town of Sundre inviting a private company to install a fibre optic network with zero Town contribution) versus business properties who have operated in Sundre for 11 to 20 years (40%).

Table 16

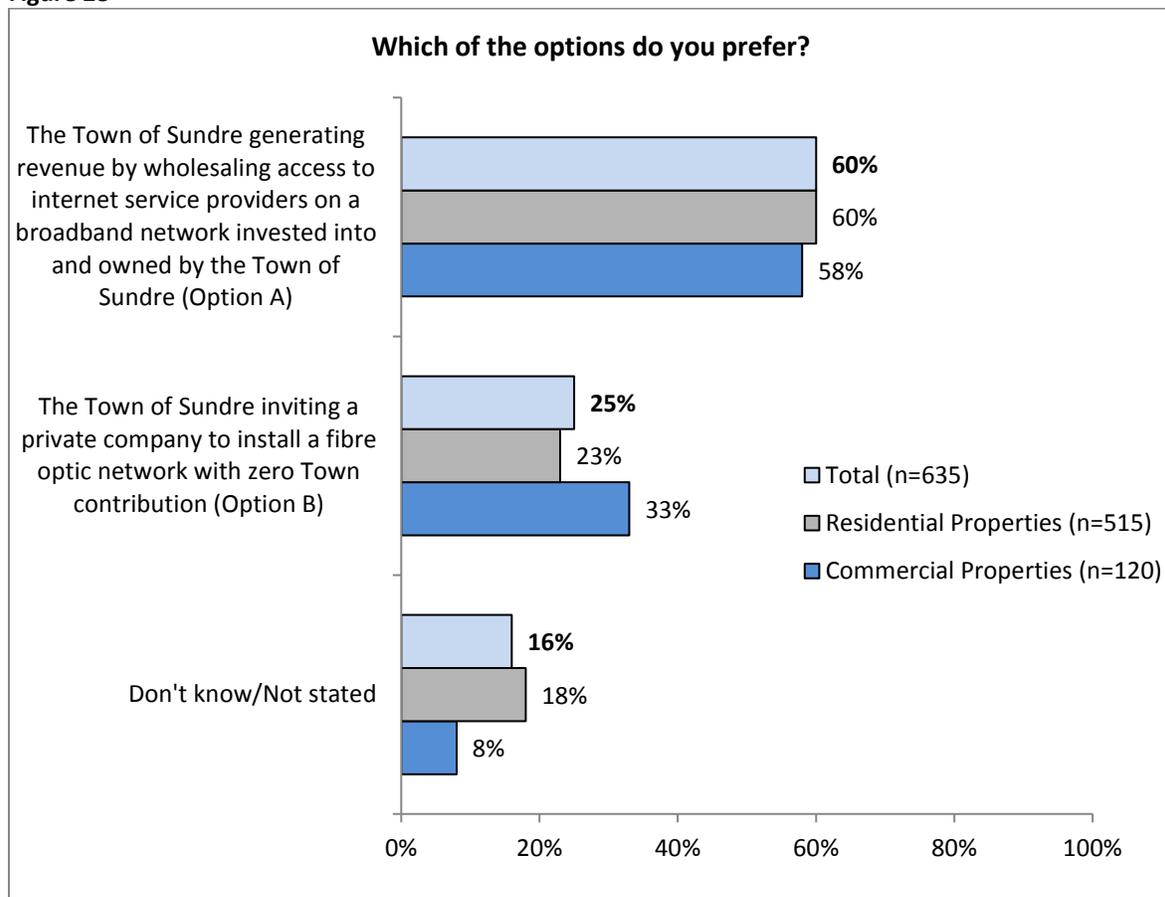
How strongly do you support or oppose...?					
	Percent of Respondents (n=635)				
	Strongly Oppose	Somewhat Oppose	Somewhat support	Strongly Support	Don't know/ Not Stated
The Town of Sundre generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre (Option A)	11	9	29	46	5
The Town of Sundre inviting a private company to install a fibre optic network with zero Town contribution (Option B)	25	22	31	15	7

Respondents were then asked which option they prefer. Most commonly, respondents preferred Option A (The Town of Sundre generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre) (60% of respondents; 60% of residential properties and 58% of commercial properties).

Twenty-five percent (25%) of respondents preferred Option B (The Town of Sundre inviting a private company to install a fibre optic network with zero Town contribution) (23% of residential properties; 33% of commercial properties).

Sixteen percent (16%) of respondents did not know or did not provide a response (18% of residential properties; 8% of commercial properties). See Figure 28, below.

Figure 28



Sub-Segment Findings

*Business properties who have operated in Sundre for 11 to 20 years (73%) were significantly more likely to prefer **Option A (the Town of Sundre generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre)** versus business properties who have operated in Sundre for 10 years or less (36%).*

*Respondent subgroups who were significantly more likely to prefer **Option B (the Town of Sundre inviting a private company to install a fibre optic network with zero Town contribution)** included the following:*

- *Commercial property respondents (33%) versus residential property respondents (23%); and*
- *Business properties who have operated in Sundre for 10 years or less (61%) versus 11 to 20 years (13%).*

Respondents were then asked for insight as to the potential benefits, and concerns or potential drawbacks of each option proposed by the Town.

For the potential benefits of Option A (the Town generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre), respondents most commonly mentioned it would be a good source of local revenue, and revenue generated would be used within the Town (36%). Ten percent of respondents (10%) did not provide any potential benefits. See Table 17, below, for a detailed list of responses.

Table 17

What do you think are the potential benefits of the Town generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre (Option A)?	
	Percent of Respondents* (n=635)
None/No benefits	10
Good source of local revenue/revenue generated is used within the Town/community	36
Tax decrease/lower taxes	10
Town will have full control of broadband services/how services are administered	8
Affordable service fees/charges/rates	5
Will attract/bring in more businesses/commercial development	5
Access to faster/better/more reliable internet/TV/phone services	4
Town services/facilities/infrastructure will improve/be enhanced/ (in general)	4
Is beneficial for Town growth/development/attracting more residents	4
Will create more local job/employment opportunities	3
Will expedite/quicken the process (in general)	3
Is a needed/required/essential service (in general)	2
Will benefit/help local businesses/services/business owners	1
Is a good idea (in general)	1
Availability of/access to internet/broadband services (in general)	1
Don't know/Not stated	21

*Multiple responses

For the concerns or potential drawbacks of Option A (the Town generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre), respondents most commonly mentioned tax increase related concerns (37%), followed by a lack of demand and/or subscribers (23%). Ten percent (10%) did not provide concerns or potential drawbacks. See Table 18, below, for a detailed list of responses.

Table 18

What do you think could be some of the concerns or potential drawbacks of the Town generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre (Option A)?	
	Percent of Respondents* (n=635)
None/No concerns	10
Cost/tax increase related concerns	37
Lack of demand/subscribers/not enough revenue generated/not meeting targets	23
Service will be poorly managed/administered by Town/lack of experienced staff	7
Lack of service provider competition/options/choices	4
Revenue generated will be wasted/misallocated/poorly spent by Town	4
Service fees/charges/rates too costly/expensive	4
Town should not get involved in managing this kind of project (in general)	3
Services provided may not be better/faster/more reliable	1
Technology is frequently changing/advancing (in general)	1
Privacy/security/confidentiality related concerns	1
Town will need to hire additional staff/personnel	1
Bureaucracy/red tape related concerns	<1
There are more important projects/priorities/issues for Town to focus on	<1
Lack of job/employment opportunities	<1
Don't know/Not stated	16

*Multiple responses

For the potential benefits of Option B (the Town inviting a private company to install the fibre optic network with zero Town contribution), respondents most commonly indicated no tax increase and/or no tax dollars used (42%). Fifteen percent (15%) did not provide any potential benefits. See Table 19, below, for a detailed list of responses.

Table 19

What do you think are the potential benefits of the Town inviting a private company to install the fibre optic network with zero Town contribution (Option B)?	
	Percent of Respondents* (n=635)
None/no benefits	15
No tax increase/No financial risk involved/no tax dollars spent/used	42
Private company would have better trained/experienced staff/management	6
Affordable/competitive service fees/charges/rates	5
Access to faster/better/more reliable internet/TV/phone services	4
Service provider competition/more provider options/choices	4
Town will not be responsible for/have strategic control of network	4
Would be an optional service/user pay structure/system	2
Will allow Town to focus on other projects/priorities/areas	1
Network infrastructure maintenance would be covered by private company	1
Service would be better managed/administered (in general)	1
Will create more local job/employment opportunities	1
Will expedite/quicken the process (in general)	1
Is beneficial for Town growth/development/attracting more residents	1
Is an easier/more simple option (in general)	1
Will be done right/properly (in general)	<1
Supporting local business	<1
Don't know/Not stated	20

***Multiple responses**

For the concerns or potential drawbacks of Option B (the Town inviting a private company to install the fibre optic network with zero Town contribution), respondents most commonly indicated that the installation of the network could take a long time or be delayed (17%), the Town will not be responsible for, and/or have strategic control of the network (16%), and expensive service fees (15%). See Table 20, below, for a detailed list of responses.

Table 20

What do you think could be some of the concerns or potential drawbacks of the Town inviting a private company to install the fibre optic network with zero Town contribution (Option B)?	
	Percent of Respondents* (n=635)
None/No concerns	11
Installation of network may be delayed/could take years/a long time	17
Town will not be responsible for/have strategic control of network	16
Service fees/charges/rates too costly/expensive	15
Capital funds leaving the area/region	12
Services provided may not be better/faster/more reliable	7
Zero dollars contributed to Town/municipality/community	7
Cost of network infrastructure installation	4
Lack of service provider competition/options/choices	3
Lack of demand/subscribers/not enough revenue generated/not meeting targets	2
Workers would be hired from outside sources/outside of Town	1
Lack of public awareness (in general)	<1
Privacy/security/confidentiality related concerns	<1
Network issues/glitches may not be fixed in a timely manner	<1
Network installation will cause traffic disruptions/jams	<1
Lack of job/employment opportunities	<1
Don't know/Not stated	18

*Multiple responses

4.7 Final Comments

Lastly, respondents were asked if they had any final comments, or anything else they would like to add regarding the survey. Seventy-three percent (73%) did not provide additional comments, while 27% provided comments.

Respondents most commonly mentioned that the project is a good idea, and the Town should implement it as soon as possible (in general) (10%). See Table 21, below, for a detailed list of responses.

Table 21

Do you have any final comments or anything else you would like to add regarding the topics in this survey?	
	Percent of Respondents* (n=635)
None/no additional comments	73
Yes, specify	27
Is a good idea/is long overdue/should implement plan as soon as possible (in general)	10
I am concerned about cost of project/tax increases	4
Need more information/do not know enough about this	4
Need access to faster/better/more reliable internet services/speed	3
Town should not get involved in managing this kind of project (in general)	2
Ensure that service fees/charges/rates are competitive/affordable	1
There are more important projects/priorities/issues for Town to focus on	1
Need to ensure that there is enough demand/interest in services before installing	1
I appreciate/am thankful for the opportunity to provide input (in general)	1
I do not need/am not interested in using/accessing this service (in general)	1
Is a good revenue source/good for a local economy	1
Service should be optional/user pay system	1
Need to ensure that Town spends money wisely/does not waste funds	1
Existing services/service providers are satisfactory	1
All service users/subscribers should pay flat rate/fee	<1
Broadband network has worked/been successful in other towns/areas	<1
Will attract/bring in more businesses/commercial development	<1

*Multiple responses

4.8 Respondent Profile

Tables 22 and 23, below and on the following page, demonstrate the demographic breakdown of the respondents surveyed for the 2017 Town of Sundre Broadband Demand Survey.

Table 22

Base: All respondents	Percent of Respondents (n=635)
Gender	
Male	46
Female	51
Not stated/Prefer not to say	3
Base: Residents only	(n=515)
Age	
18 to 24	2
25 to 34	9
35 to 44	16
45 to 54	18
55 to 64	22
65 and older	31
Mean	55.3 years of age
Which best describes the type of dwelling for this address?	
Detached single family dwelling	80
Semi-detached single family dwelling/duplex	8
Low-rise apartment/condo (less than 5 stories)	6
High-rise apartment/condo (5 stories or more)	<1
Don't know/Not stated/Prefer not to say	6
Base: Residents only, excluding "Don't know," "Not stated," and "Not applicable" responses.	(n=480)
Percent of Households with at Least One (1) Person in Each Age Group	
7 years of age or younger	13
8 to 12 years of age	12
13 to 17 years of age	12
18 to 24 years of age	11
25 to 34 years of age	15
35 to 44 years of age	22
45 to 54 years of age	24
55 to 64 years of age	27
65 years and older	33
Mean Household Size	2.44

Table 23

Base: Businesses only	Percent of Respondents (n=120)
Number of Employees	
1 to 9 employees	68
10 to 39 employees	13
40 to 69 employees	1
70 to 99 employees	2
Not Applicable	13
Don't know/Not stated	4
Length of Business Operation in the Town of Sundre	
Less than 2 years	9
3 to 5 years	16
6 to 10 years	12
11 to 20 years	38
More than 20 years	20
Mean	16.3 years

APPENDIX A – SURVEY INSTRUMENT



Broadband Demand Survey

Web Intro

Banister Research has been contracted by the Town of Sundre to conduct research with residents and businesses in the Town regarding the idea of developing broadband fibre optic network infrastructure. The survey results will help Council make decisions about whether or not to proceed. The survey will take approximately **15 minutes** to complete, depending on your responses.

Please be assured that all of your responses will be kept completely anonymous and reported in aggregate. If you have any technical difficulties accessing the survey, please contact Braedan O'Reilly at Banister Research at boreilly@banister.ab.ca or by phone at (780) 451-4444.

If you have any questions or concerns about the nature or legitimacy of the research, please contact Jon Allan, Economic Development Officer with the Town of Sundre at jon.a@sundre.com or by phone at (403) 638-3551.

The deadline to complete the survey is **May 21st, 2017**.

Telephone Introduction [ALL TELEPHONE RECORDS]

Hello, my name is [INSERT INTERVIEWER NAME]. I am calling from Banister Research, a professional market research firm. Banister Research has been contracted by the Town of Sundre to conduct research with residents and businesses in the Town regarding the idea of developing broadband fibre optic network infrastructure. The survey results will help Council make decisions about whether or not to proceed.

- B. [PHONE:] Before we proceed, may I please confirm whether we have reached a Town of Sundre resident or business?
1. Resident
 2. Business

Cellphone Introduction [CELL PHONE RECORDS ONLY]

B. May I please confirm that we have reached you via cell phone?

1. Yes, this is a cell phone [CONTINUE]
2. No, this is a landline [SKIP TO TELEPHONE SCRIPT]

C. Are you in a safe and legal position to speak with me? I would like to ensure that you are not currently driving or prohibited from speaking on your cell phone.

1. Yes [CONTINUE]
2. No [ARRANGE CALLBACK: When can I call you back? Would you prefer if I call you later on a landline?]

1. Yes, callback on cell phone [SCHEDULE CALLBACK]

2. Yes, callback on landline [RECORD LANDLINE NUMBER AND START AGAIN WITH TELEPHONE SCRIPT]

3. No [THANK AND TERMINATE]

E. Before we continue, I would also like to confirm that this survey will not be conducted at a cost to you, for example by charging you long-distance. May I confirm that our time on the phone will not cost you anything?

1. Yes, no charge [CONTINUE]
2. No, there is a charge [ARRANGE CALLBACK: May I call you back on a landline so that we do not incur any costs for you?]

1. Yes [RECORD LANDLINE NUMBER AND SCHEDULE CALLBACK]

2. No [THANK AND TERMINATE]

IF "YES" TO ALL CELL PHONE QUESTIONS, CONTINUE TO TELEPHONE SCRIPT

Resident Telephone Introduction [IF RESIDENT/1 IN A]

I would like to assure you that we are not selling or promoting anything and that all your responses will be kept completely anonymous and reported in aggregate.

C. For this study, I need to speak to the head of household who is at least 18 or older. Is that person available?

1. Yes, speaking **Continue**
2. Yes, I'll get him/her **Repeat introduction and continue**
3. Not now **Arrange callback and record first name of selected respondent**

D. **RECORD GENDER – DO NOT READ:**

1. Male
2. Female

E. This interview will take about **15 minutes**, depending on your responses. Is this a convenient time for us to talk, or should we call you back?

1. Convenient time **→ CONTINUE TO QH**
2. Not convenient time **→ ARRANGE CALL-BACK OR THANK AND TERMINATE IF REFUSAL**

[Interviewer Note: Refer any respondent concerns about the interview to Jon Allan, Economic Development Officer with the Town of Sundre at jon.a@sundre.com or by phone at (403) 638-3551]

Business Telephone Introduction [IF BUSINESS/2 IN A]

F. May I speak with **[INSERT NAME]** please?

1. Yes, speaking **→ CONTINUE**
2. Yes, I'll get him/her **→ REPEAT INTRO AND CONTINUE**
3. Not available **→ ASK FOR OWNER/MANAGER, ARRANGE CALLBACK AS NECESSARY**
4. Not at this number **→ CONTINUE AND RECORD NEW NUMBER**

→ IF NO ONE IS AVAILABLE, ASK TO SPEAK WITH THE OWNER OR MANAGER

I would like to assure you that we are not selling or promoting anything and that all your responses will be kept completely anonymous and reported in aggregate.

G. **RECORD GENDER – DO NOT READ:**

1. Male
2. Female

H. This interview will take about **15 minutes**, depending on your responses. Is this a convenient time for us to talk, or should we call you back?

1. Convenient time **→ CONTINUE**
2. Not a convenient time **→ ARRANGE CALLBACK**

- I. Before we continue, may I confirm that you have not completed an online version of this survey?
 1. Have not completed online → **CONTINUE TO SECTION 1**
 2. Completed online → **THANK AND TERMINATE**

[Interviewer Note: Refer any respondent concerns about the interview to Jon Allan, Economic Development Officer with the Town of Sundre at jon.a@sundre.com or by phone at (403) 638-3551]

Section 1: Profile/Qualifiers

- 1) **[WEB:] Enter PIN** (the PIN can be found immediately below the URL or survey link on the letter you received):

[PHONE]: Before we continue, can I please verify your PIN or ID? You should have received it in the letter you received in the mail. It is located immediately below the URL or survey link under the online survey option.

1. _____
- 2) a) **[Address linked to PIN will pop up]**. The address we have for you on file is **[INSERT ADDRESS]**. Does this match where you reside or conduct business?
 1. Yes
 2. No

[IF NO IN Q2A] → **[WEB – SHOW MESSAGE:]** Please contact Banister Research, toll-free, at 1-866-451-4441. Our supervisors will be happy to assist you. Thank you.]

- b) **[IF NO IN Q2A]** → **[PHONE – READ:]** What is your current mailing address?

_____ **[RECORD ADDRESS]**

- 3) [WEB:] For this survey for [INSERT ADDRESS FROM Q2A OR Q2B], are you responding as...? [Note: If you are a resident of Sundre **and** a Business Owner/Operator you may have received more than one survey invitation, and we hope that you will participate in both surveys. If you own/rent multiple residential or commercial properties, or own multiple businesses, we hope that you will respond on behalf of each, as different properties may have different internet needs].

[PHONE:] For this survey for [INSERT ADDRESS FROM Q2A OR Q2B], are you responding as...? [Note: If you are a resident of Sundre **and** a Business Owner/Operator you may have received more than one survey invitation, and we hope that you will participate in both surveys. If you own/rent multiple residential or commercial properties, or own multiple businesses, we hope that you will respond on behalf of each, as different properties may have different internet needs].

1. Residential property owner → **Residential property respondent**
2. Residential property renter → **Residential property respondent**
3. Commercial property owner → **Business property respondent**
4. I lease or rent commercial/industrial property for my organization → **Business property respondent**
5. None of the above/I am not associated with this property → **THANK AND TERMINATE**

Section 2: Current Internet Use

- 4) Do you subscribe to any of the following services at this address?
1. Yes
 2. No
 3. Not Applicable/Don't make subscription decisions for this address
 - F5. Don't Know/Not Stated

- a) Internet
- b) TV (cable or satellite)
- c) Home phone (landline) **via the Internet** (Voice over Internet Protocol, or VoIP) [WEB: Hover over/Interviewer Note for Telephone: Voice over Internet Protocol refers to phone service delivered through your internet connection instead of from your local phone company.]
- d) Home phone (landline) **not via the internet**

[IF NO OR NA OR DON'T KNOW/NOT STATED TO ALL OF Q4 SKIP TO SECTION 3]

- 5) a) [ASK IF SELECTED IN Q4] Who is your service provider for **Internet**?
1. Airenet
 2. Shaw
 3. Telus
 4. Xplornet
 5. CCI Wireless
 6. Other Internet Provider, please specify _____
 - F5. Don't Know/Not Stated

b) **[ASK IF SELECTED IN Q4]** Who is your service provider for **TV (cable or satellite)**?

1. Shaw
2. Telus
3. Bell
4. CCI Wireless
5. Other TV provider, please specify _____
- F5. Don't Know/Not Stated

c) **[ASK IF SELECTED IN Q4]** Who is your service provider for **Home phone (landline) via the Internet (Voice over Internet Protocol, or VoIP)**?

1. Bell
2. Shaw
3. Telus
4. Other VoIP Provider, please specify _____
- F5. Don't Know/Not Stated

d) **[ASK IF SELECTED IN Q4]** Who is your service provider for **Home phone (landline) not via the internet**?

1. Bell
2. Shaw
3. Telus
4. Other landline (not via internet) provider, please specify _____
- F5. Don't Know/Not Stated

6) a) **[ASK IF SELECTED IN Q4]** How satisfied are you with your current **Internet** service provider? Use a scale of 1 to 5, where 1 means "very dissatisfied" and 5 means "very satisfied."

1. Very dissatisfied
- 2.
- 3.
- 4.
5. Very satisfied
- F5. Don't Know/Not Stated

b) **[ASK IF SELECTED IN Q4]** How satisfied are you with your current **TV (cable or satellite)** service provider? Use a scale of 1 to 5, where 1 means "very dissatisfied" and 5 means "very satisfied."

1. Very dissatisfied
- 2.
- 3.
- 4.
5. Very satisfied
- F5. Don't Know/Not Stated

c) **[ASK IF SELECTED IN Q4]** How satisfied are you with your current **Home phone (landline) via the Internet (Voice over Internet Protocol, or VoIP)** service provider? Use a scale of 1 to 5, where 1 means “very dissatisfied” and 5 means “very satisfied.”

1. Very dissatisfied
- 2.
- 3.
- 4.
5. Very satisfied
- F5. Don't Know/Not Stated

d) **[ASK IF SELECTED IN Q4]** How satisfied are you with your current **Home phone (landline) not via the internet** service provider? Use a scale of 1 to 5, where 1 means “very dissatisfied” and 5 means “very satisfied.”

1. Very dissatisfied
- 2.
- 3.
- 4.
5. Very satisfied
- F5. Don't Know/Not Stated

7) **[ASK FOR EACH SELECTED IN Q4]** Is your current service agreement for **[INSERT FROM Q4]**...?

1. No contract
2. Annual (i.e., renew on a yearly basis)
3. 2-year term
4. 3-year term
5. Other; specify: _____
- F5. Don't Know/Not Stated

8) **[LIST FROM Q4/SUBSCRIBES TO EACH SERVICE]** How much do you pay (monthly) for your current services? [Please answer “0” if you don't know how much you pay for the service]

- | | |
|---|-----------------|
| a. Internet | \$___ per month |
| b. TV (Cable or satellite) | \$___ per month |
| c. Home phone (landline) via the Internet | \$___ per month |
| d. Home phone (landline) not via the internet | \$___ per month |
| Total [AUTOSUM ABOVE] | \$___ per month |
| F5. Don't Know/Not Stated | |

9) **[IF YES IN 4A/SUBSCRIBES TO THE INTERNET]** How many devices are connected to the internet for this internet account (including mobile phones)?

1. _____ devices
- F5. Don't Know/Not Stated

- 10) **[IF YES TO 4A/SUBSCRIBES TOTHE INTERNET]** How satisfied are you with your current internet speeds? Use a scale of 1 to 5, where 1 means “very dissatisfied” and 5 means “very satisfied.”
1. Very dissatisfied
 - 2.
 - 3.
 - 4.
 5. Very satisfied
- F5. Don't Know/Not Stated

Section 3: Information on Broadband Service

Fibre optics are a type of communications infrastructure that allow for internet download and upload speeds of up to 1 Gigabit per second, and increased consumer choice for TV and phone services. The Town of Sundre is now in the public consultation phase of their pursuit of fibre-optics, to determine the following:

- 1) the market demand for improved broadband services; and
- 2) the public appetite to spend public dollars on such a network

The Town of Sundre has narrowed down the potential development of a Broadband Network to two (2) operational models:

Option A – Publicly-owned Wholesale Broadband Network

This option would require approximately \$2.75 million in capital spent over four years. To generate revenue, it would involve selling access to the network to private internet service providers (ISPs).

The potential benefits associated with this option are the following:

- i. If penetration targets are met, it will enable future Councils to utilize the profits generated from the network for the betterment of the community;
- ii. The network would remain an asset of, and in strategic control of the Town and community;
- iii. Millions of dollars in capital would not leave the community.

No tax increase would be required if penetration targets are met within 4 years, since the deployment would rely on debenture borrowing and existing reserves.

The risks are the following:

- a) If penetration targets are not met in under 5 years, then tax increases might be required to cover the cost of operations and debt repayment;
- b) The cost to borrow could impact the borrowing limit required for future projects.

Option B – Invite Private Company to Install Wholesale Broadband Network

This option would involve inviting a private company to install a broadband network in Sundre, using absolutely no tax dollars. The network would not be guaranteed and would be installed at a time and choosing of a company's choice.

The benefits of such a model would be the following:

- a) There would be no tax dollars used, and therefore absolutely no risk.

The downsides associated with this model are the following:

- a) There would be absolutely zero dollars contributed to the municipality;
- b) Strategic control of the network would remain outside of the municipality;
- c) Millions of dollars in capital would leave the region;
- d) Deployment by a private company could be years away.

There would be many potential benefits to Sundre citizens, businesses, and social institutions with either option. Please visit SundreBroadband.com for a description of the many benefits of broadband infrastructure.

Based on existing rates in nearby markets, the expected monthly service fee would be in the range of \$150 for a combined bundle consisting of high-speed internet, TV and phone services for home customers. Internet-alone service could be as low as \$90 per month.

Section 4: Overall Support for Fibre Optics

11) Overall, how strongly do you support the concept of the Town pursuing broadband fibre optic network infrastructure? Do you...?

1. Strongly oppose
2. Somewhat oppose
3. Somewhat support
4. Strongly support
- F5. Don't Know/Not Stated

12) **[ASK IF Q11=3-4/Support]** Why do you **support** the concept of broadband fibre optic network infrastructure in the Town of Sundre?

1. _____
- F5. Don't Know/Not Stated

13) **[ASK IF Q11=1-2/Oppose]** Why do you **oppose** the concept of broadband fibre optic network infrastructure in the Town of Sundre?

1. _____
- F5. Don't Know/Not Stated

14) How strongly do you agree with the following statements? Use a scale of 1 to 5, where 1 means "strongly disagree" and 5 means "strongly agree."

1. Strongly disagree
 - 2.
 - 3.
 - 4.
 5. Strongly agree
 6. Not Applicable
 - F5. Don't Know/Not Stated
-
- a) There is a need in the Town of Sundre for improved internet service
 - b) There is a need in the Town of Sundre for improved telecommunications competition
 - c) The Town should be proactive by pursuing broadband fibre optic network infrastructure for its residents and businesses
 - d) Broadband Fibre optic network infrastructure will make the Town more attractive to potential residents
 - e) Broadband Fibre optic network infrastructure will make the Town more attractive to potential businesses
 - f) Broadband Fibre optic network infrastructure will improve the overall quality of life in the Town of Sundre
 - g) **[ASK IF 3 OR 4/BUSINESS PROPERTY RESPONDENT IN Q3]** Broadband fibre optic network infrastructure will improve the competitiveness of my business

Section 5: Likelihood to Use

15) How likely would you be to subscribe, or switch from your current service provider, to each of the following services on the proposed broadband fibre optic network if and when a broadband fibre optic network becomes available?

1. Not at all likely
2. ...
3. ...
4. ...
5. Very likely
- F5. Don't Know/Not Stated

- a) Internet
- b) TV (cable or satellite)
- c) Home phone (landline) via the Internet (Voice over Internet Protocol, or VoIP) **[WEB: Hover over/Interviewer Note for Telephone:** Voice over Internet Protocol refers to phone service delivered through your internet connection instead of from your local phone company.]

16) **[ASK FOR EACH RATING OF 1-3 IN Q15]** Why wouldn't you be likely to subscribe to **[INSERT FROM Q15]** on the proposed broadband fibre optic network?

1. _____
- F5. Don't Know/Not Stated

Section 6: Model Alternatives

17) Based on the information provided, please think about how strongly you support or oppose each of the following. How strongly would you support or oppose...?

1. Strongly oppose
2. Somewhat oppose
3. Somewhat support
4. Strongly support
- F5. Don't Know/Not Stated

- a) The Town of Sundre generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre (Option A)
- b) The Town of Sundre inviting a private company to install a fibre optic network with zero Town contribution (Option B)

18) Which of the options do you prefer?

1. The Town of Sundre generating revenue by wholesaling access to internet service providers on a broadband network invested into and owned by the Town of Sundre (Option A)
2. The Town of Sundre inviting a private company to install a fibre optic network with zero Town contribution (Option B)
- F5. Don't Know/Not Stated

19) What do you think are the potential **benefits** of the Town **generating revenue by wholesaling access to internet service providers on a broadband network** (Option A) invested into and owned by the Town of Sundre?

1. _____
F5. Don't Know/Not Stated

20) What do you think could be some of the **concerns** or potential drawbacks of the Town **generating revenue by wholesaling access to internet service providers on a broadband network** (Option A) invested into and owned by the Town of Sundre?

1. _____
F5. Don't Know/Not Stated

21) What do you think are the potential **benefits** of the Town **inviting a private company** (Option B) to install the fibre optic network with zero Town contribution?

1. _____
F5. Don't Know/Not Stated

22) What do you think could be some of the **concerns** or potential drawbacks of the Town **inviting a private company** (Option B) to install the fibre optic network with zero Town contribution?

1. _____
F5. Don't Know/Not Stated

Section 7: Final Comments

23) Do you have any final comments or anything else you would like to add regarding the topics in this survey?

1. _____
2. None/no additional comments
F5. Don't Know/Not Stated

Section 8: Demographics

Now we have a few demographic questions to conclude....

24) **[ALL WEB RESPONDENTS]** Gender

1. Male
2. Female
3. Other
- F5. Prefer not to answer

25) **[1 OR 2 IN Q3/RESIDENTIAL PROPERTY RESPONDENTS ONLY]** What year were you born in?

1. _____ **[RECORD YEAR OF BIRTH]**
- F5. Don't Know/Not Stated

26) **[1 OR 2 IN Q3/RESIDENTIAL PROPERTY RESPONDENTS ONLY]** Which best describes the type of dwelling for this address?

1. Detached single family dwelling
2. Semi-detached single family dwelling/duplex
3. Low-rise apartment/condo (less than 5 stories)
4. High-rise apartment/condo (5 stories or more)
5. Prefer not to answer
- F5. Don't Know/Not Stated

27) **[1 OR 2 IN Q3/RESIDENTIAL PROPERTY RESPONDENTS ONLY]** Including yourself, how many people in each of the following age groups live in your household? **[CONFIRM TOTAL # IN HOUSEHOLD]**.

1. 7 years of age or younger: _____
2. 8 to 12: _____
3. 13 to 17: _____
4. 18 to 24: _____
5. 25 to 34: _____
6. 35 to 44: _____
7. 45 to 54: _____
8. 55 to 64: _____
9. 65 and older: _____
10. Prefer not to answer
11. Not applicable/I don't reside at this address
- F5. Don't Know/Not Stated

28) **[3 OR 4 IN Q3/BUSINESS PROPERTY RESPONDENTS ONLY]** How many employees work at this address?

1. 1 to 9 employees
2. 10 to 39 employees
3. 40 to 69 employees
4. 70 to 99 employees
5. 100 to 250 employees
6. More than 250 employees
7. Not applicable
- F5. Don't know/Not stated

29) **[3 OR 4 IN Q3/BUSINESS PROPERTY RESPONDENTS ONLY]** How long has your business operated in the Town of Sundre?

1. _____ **YEARS**
2. Not applicable
- F5. Don't know/Not stated

That concludes the survey. We thank you very much for your participation in our research.