



2017 Town of Sundre Broadband Demand Study Presentation of Results

June 26th, 2017

Banister
Research & Consulting Inc.



Project Background and Objectives

- Banister Research has been contracted to conduct research with residents and businesses in the Town of Sundre regarding the idea of developing broadband fibre optic network infrastructure.
- Banister Research conducted an unbiased and comprehensive public engagement process with businesses, residents, and property owners in Sundre, to meet the following objectives:
 - Determining the appetite for use of public dollars on a wholesale broadband network; and
 - Determining the market demand for a broadband fibre optic network.



Methodology

- Banister Research received a database of residences and businesses from the Town of Sundre.
 - Personal Identification Numbers (PINs) were electronically generated and assigned to each residence and business.
- Survey invitation letters along with the PINs were mailed out to each of the addresses listed in the database between April 28th and May 2nd, 2017 from the Banister Research Call Centre.
- Data collection occurred between April 28th and May 24th, 2017:
 - A total of 635 surveys were completed with Town of Sundre residential property owners/renters, and commercial property owners/renters and leaseholders
 - A total of 475 property units were contacted successfully, but chose not to participate in the process



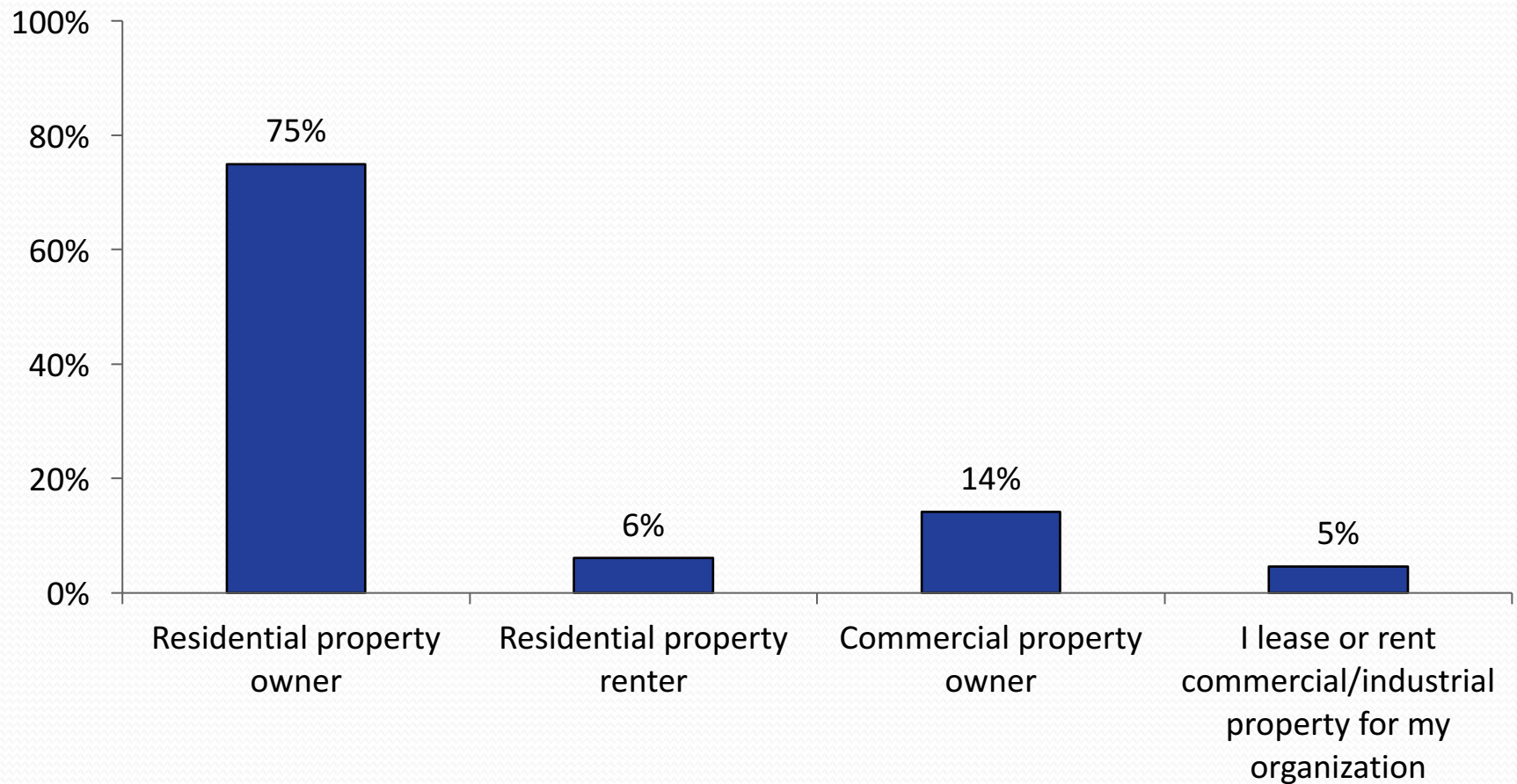
Data Collection

- The following data collection methods were used in the Town of Sundre Broadband Demand Study:
 - Information Sessions – Banister Research facilitated three (3) information sessions on Tuesday, May 9th at the Town of Sundre Community Centre with residents and businesses of Sundre.
 - Mailout-to-web data collection – Residents and businesses of the Town of Sundre were mailed PINs and invitations to a web survey link, hosted on the Banister Research web server.
 - Telephone data collection – Banister Research contacted residents and businesses who had not completed the survey throughout the data collection process via telephone.
 - Door-to-door follow-up – The Town of Sundre hired and managed door-to-door surveyors, who visited residents and businesses of Sundre to inform them of the survey opportunity.



Demographic Profile

Are you responding as...?

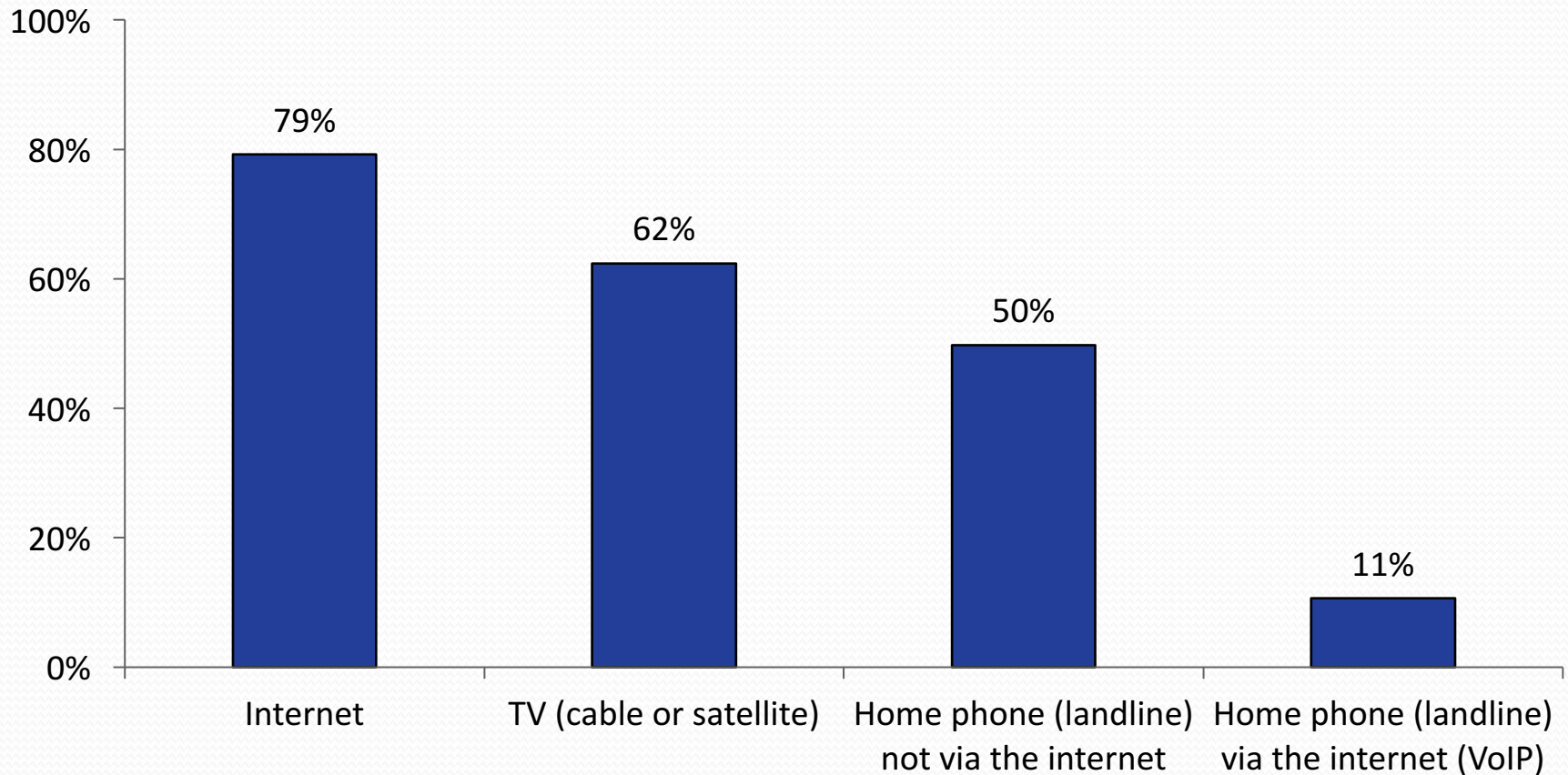


n=635



Current Internet Use

Do you subscribe to any of the following services?*



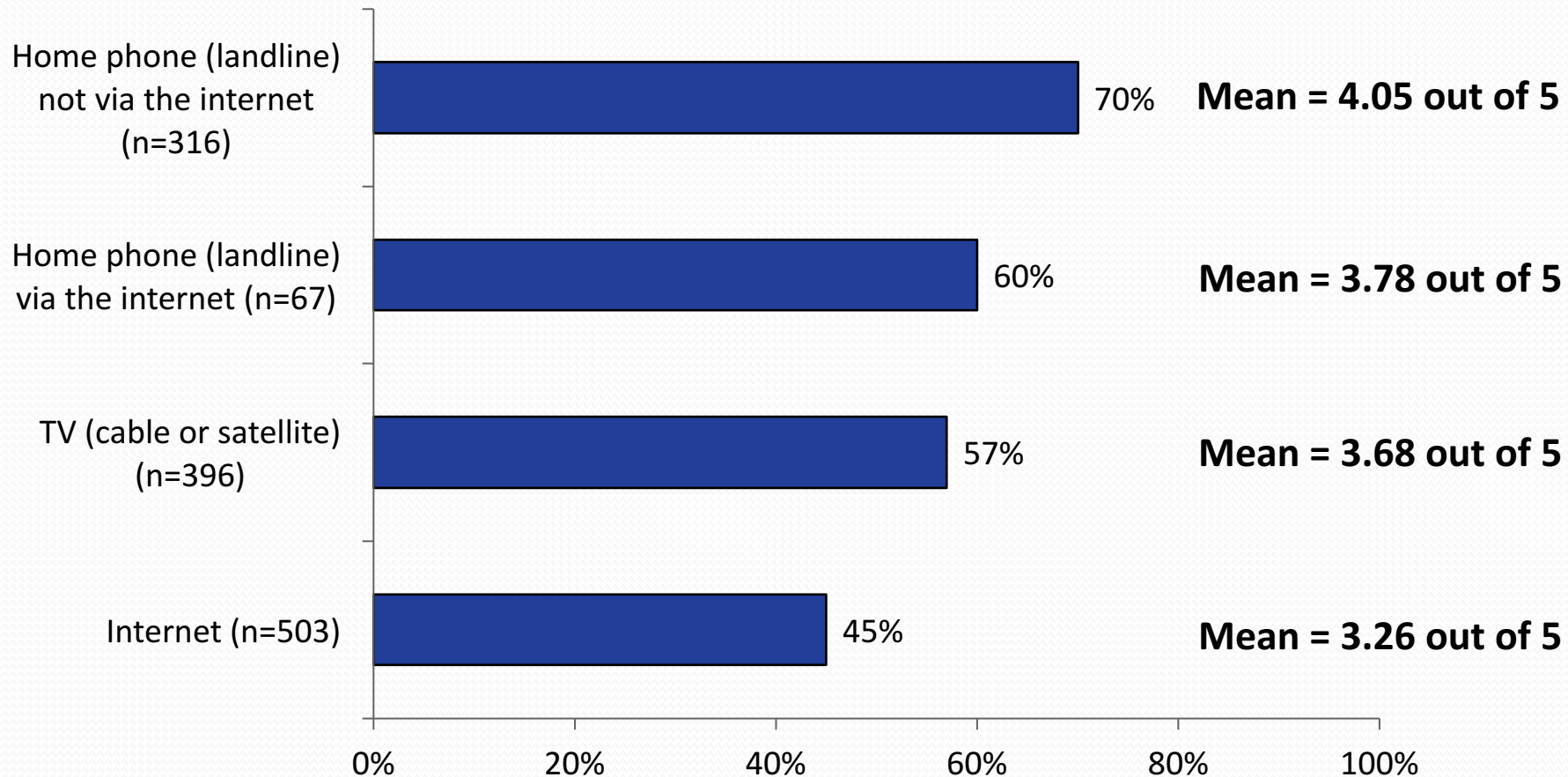
n=635

*Percent of respondents who subscribe to each service



Satisfaction with Service Provider

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

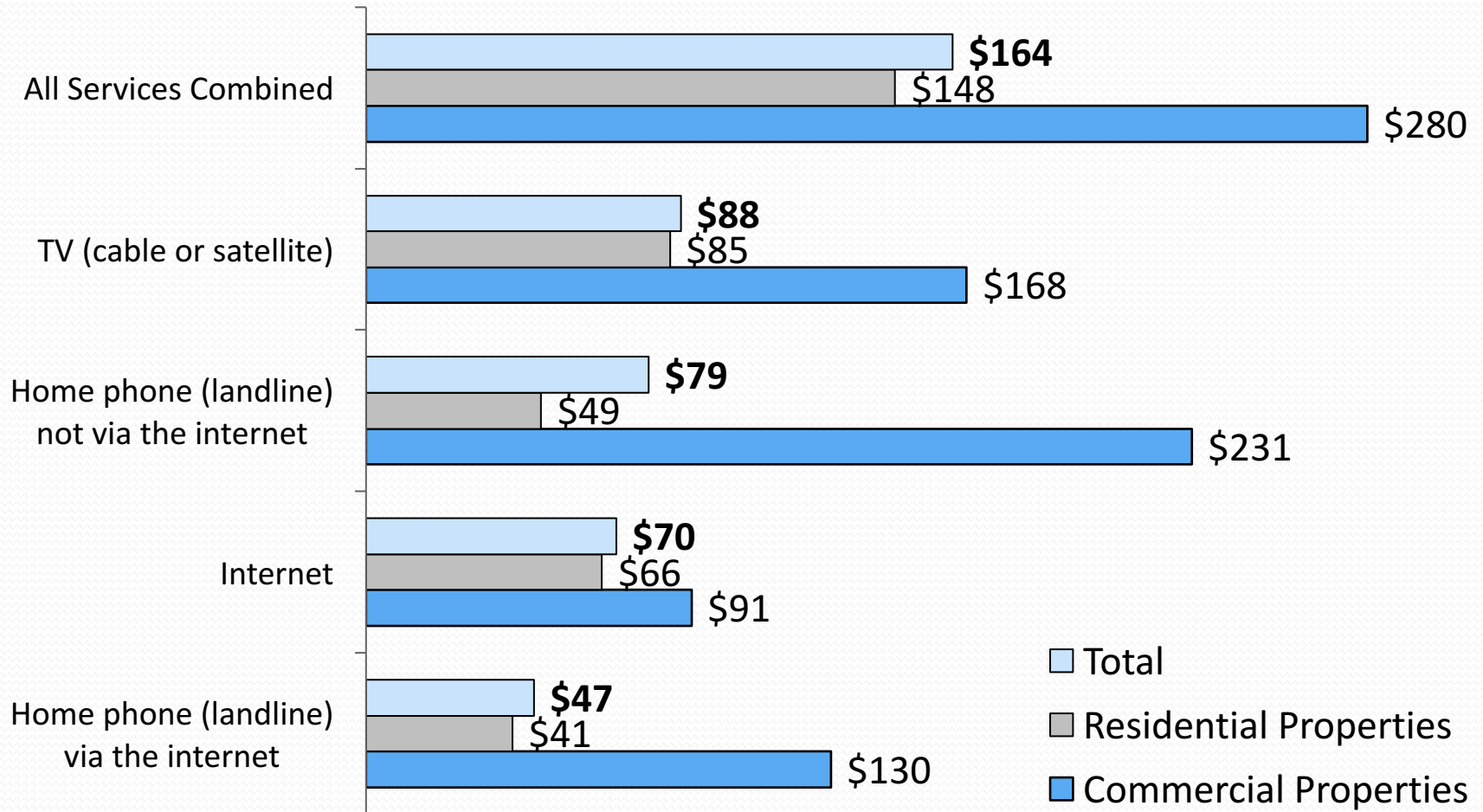


*Percent of respondents who were satisfied with each (ratings of 4 or 5 out of 5)

Base: Respondents who have a subscription for each

Cost of Services (Summary)

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



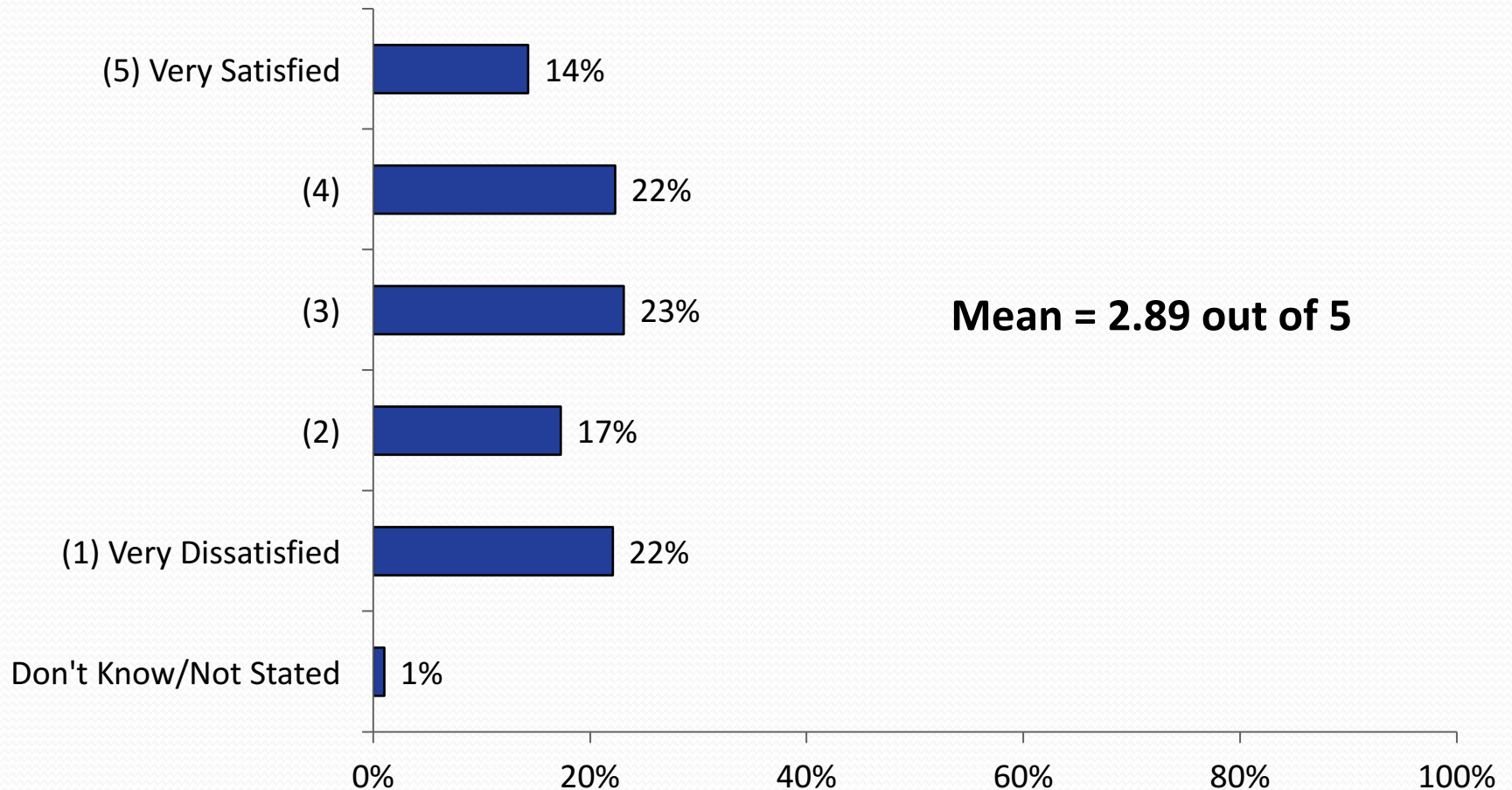
*Average monthly cost of service

Base: Respondents who subscribe to each



Satisfaction with Service

How satisfied are you with your current internet speeds?



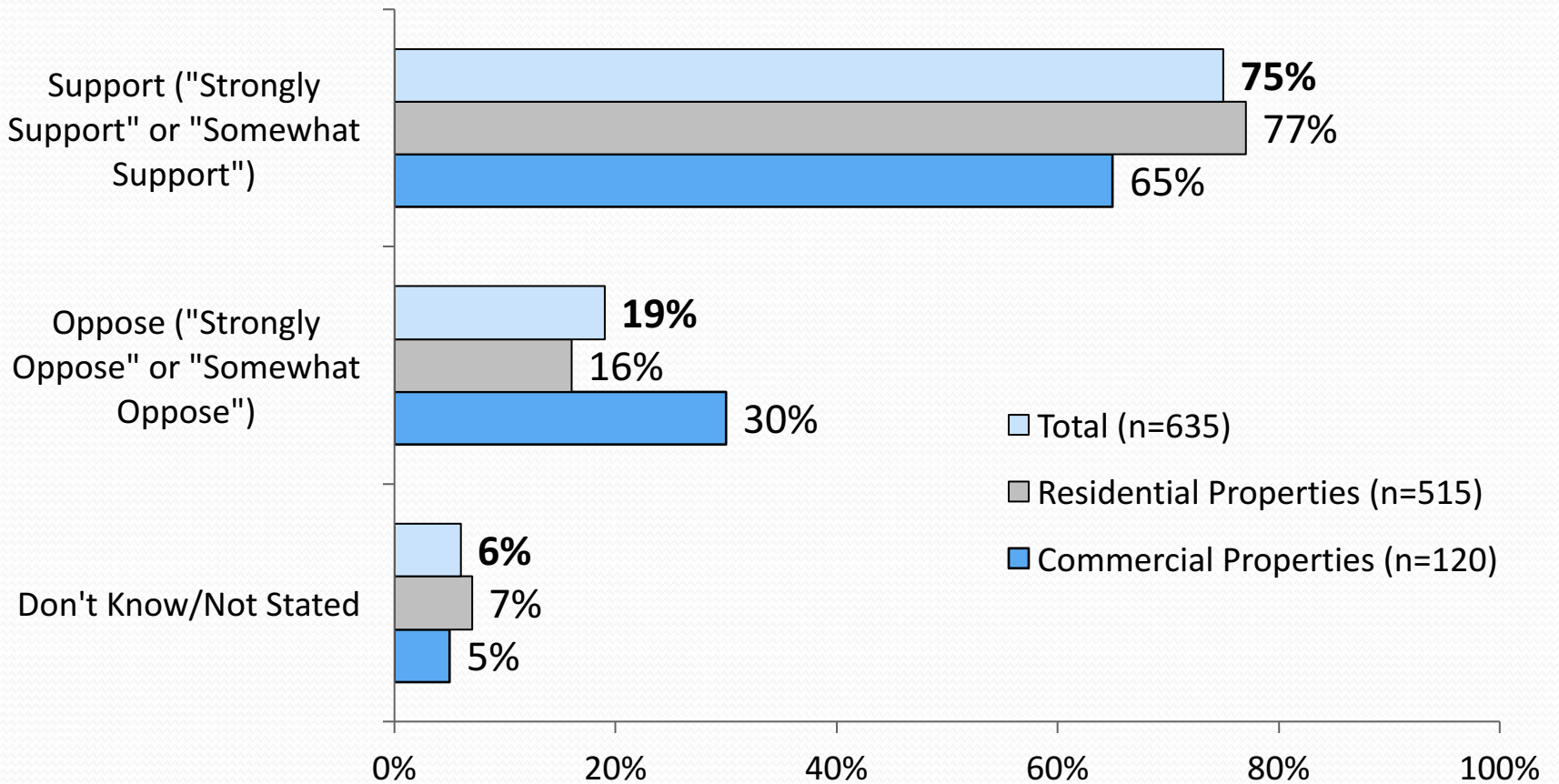
n=503

Base: Respondents who have an internet subscription



Support of Broadband Fibre Optic Network Infrastructure

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





Reasons for Support/Opposition

Why do you support/oppose the concept of broadband fibre optic network infrastructure in the Town of Sundre?

Reasons for Support (n=475) (Top Responses)

- Access to better/more reliable Internet services/speeds (33%);
- Will be good/beneficial for Town growth (19%); and
- Is a good revenue source/good for local economy (15%).

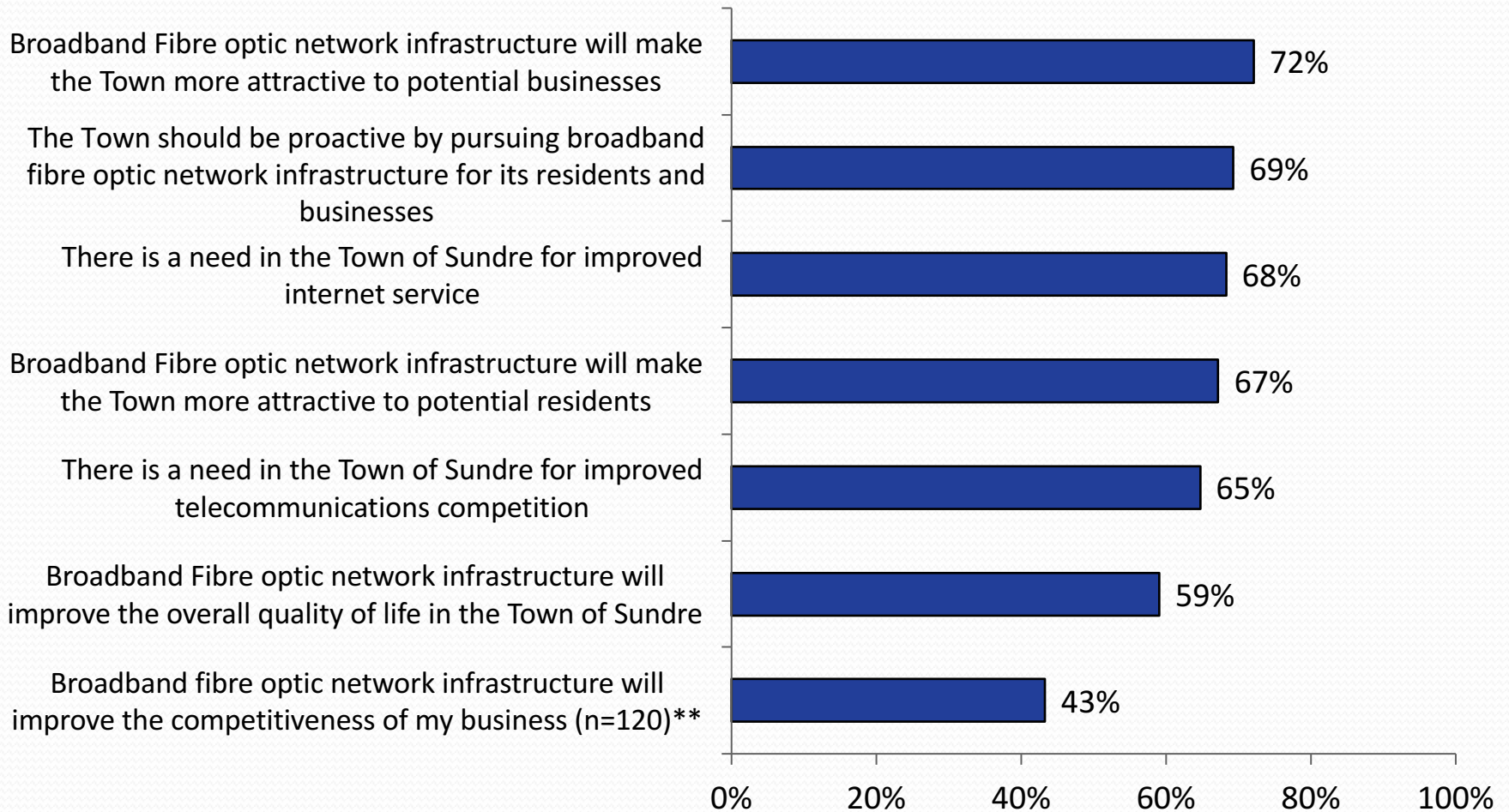
Reasons for Opposition (n=120) (Top Responses)

- Cost/tax increase related concerns (48%);
- I am satisfied with my current service provider (15%); and
- There are more important projects/priorities for the Town to focus on (10%).

Base: Respondents who indicated support or opposition for the concept of broadband fibre optic network infrastructure in the Town of Sundre.



Level of agreement with Statements regarding Fibre Optics*



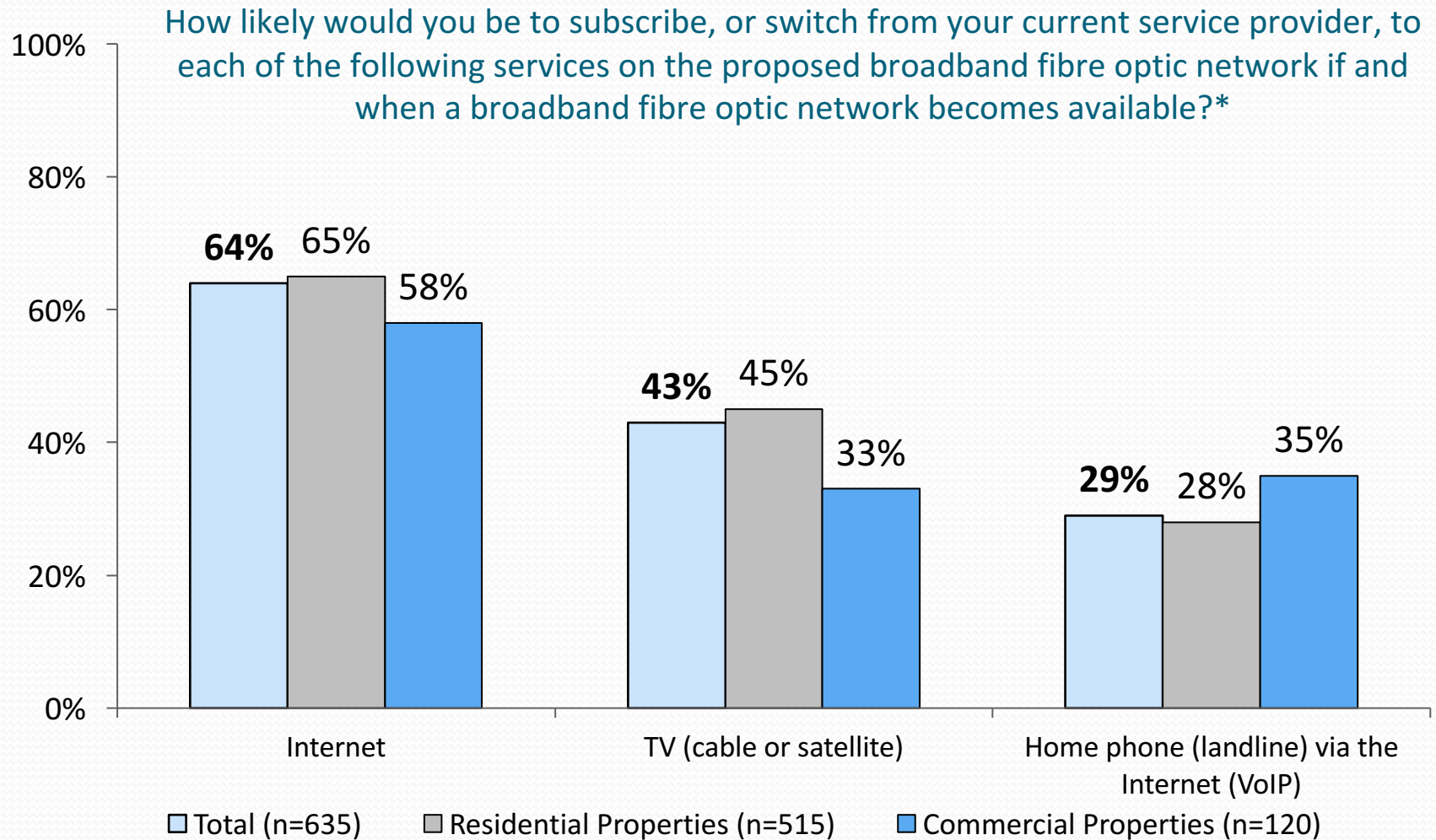
n=635

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

**Only business respondents were asked about this statement



Likelihood of Subscribing to Proposed Fibre Optic Network



*Percent of respondents who were likely (ratings of 4 or 5 out of 5) to subscribe to each



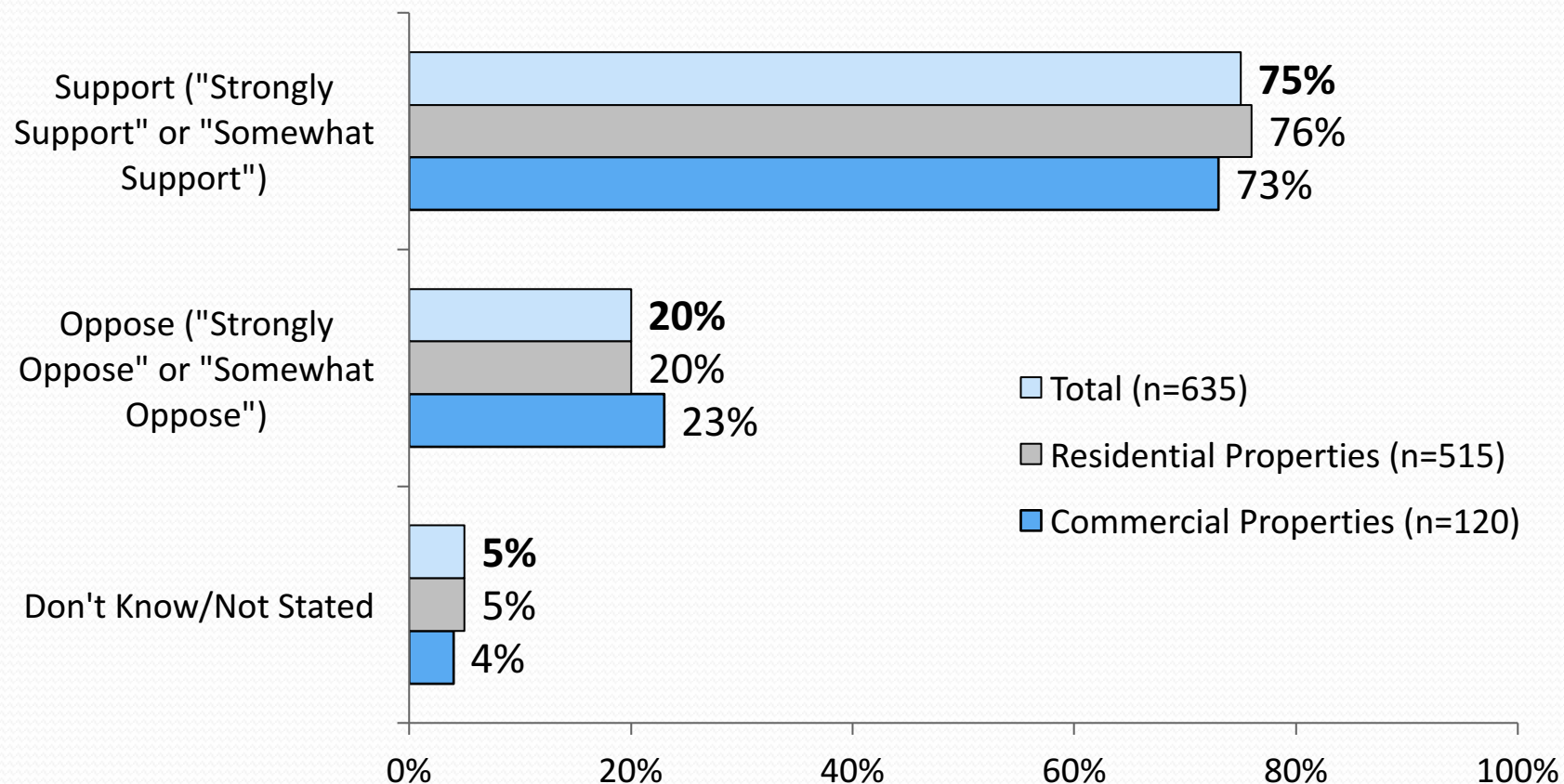
Reasons For Being Unlikely to Subscribe

Respondents who were unlikely (ratings of 1 to 3 out of 5) to subscribe to...

- **Internet** on the proposed network (n=193) most commonly stated they were unlikely to because:
 - Service fees/rates are too costly (38%);
 - Satisfied with current service provider (33%); and
 - Do not need/are not interested in the service (17%).
- **TV (cable or satellite)** on the proposed network (n=297) most commonly stated they were unlikely to because:
 - Do not need/are not interested in the service (41%);
 - Satisfied with current service provider (28%); and
 - Service fees/rates are too costly (16%).
- **VoIP home phone** on the proposed network (n=347) most commonly stated they were unlikely to because:
 - Do not need/are not interested in the service (58%);
 - Satisfied with current service provider (18%); and
 - Service fees/rates are too costly (11%).

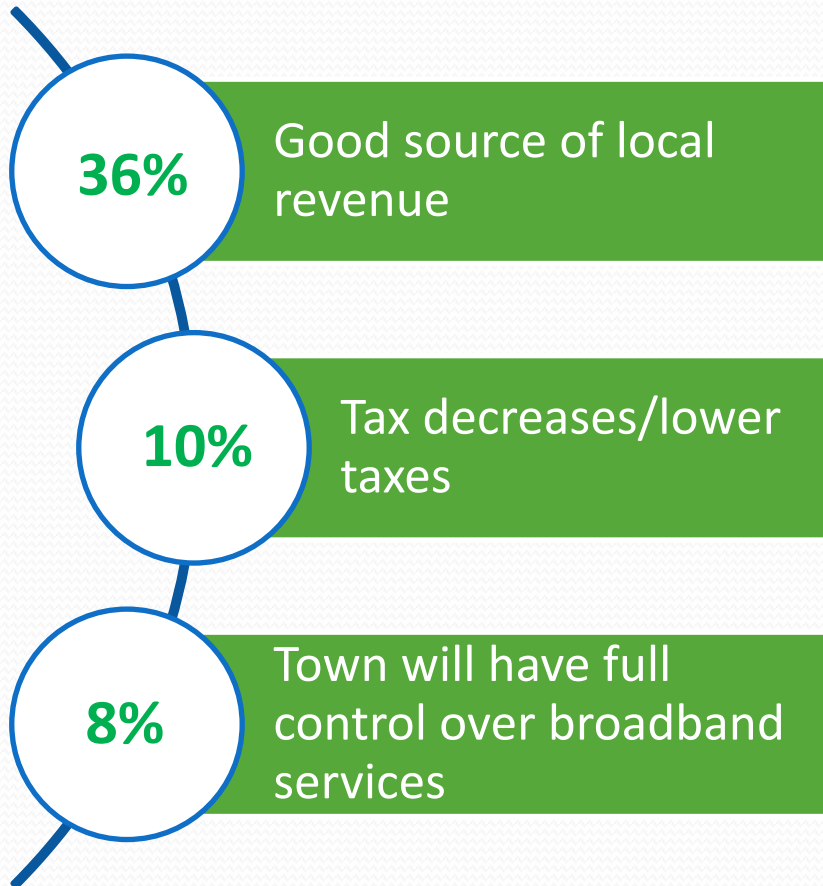
Support for Fibre Optic Installation

How strongly would you 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)

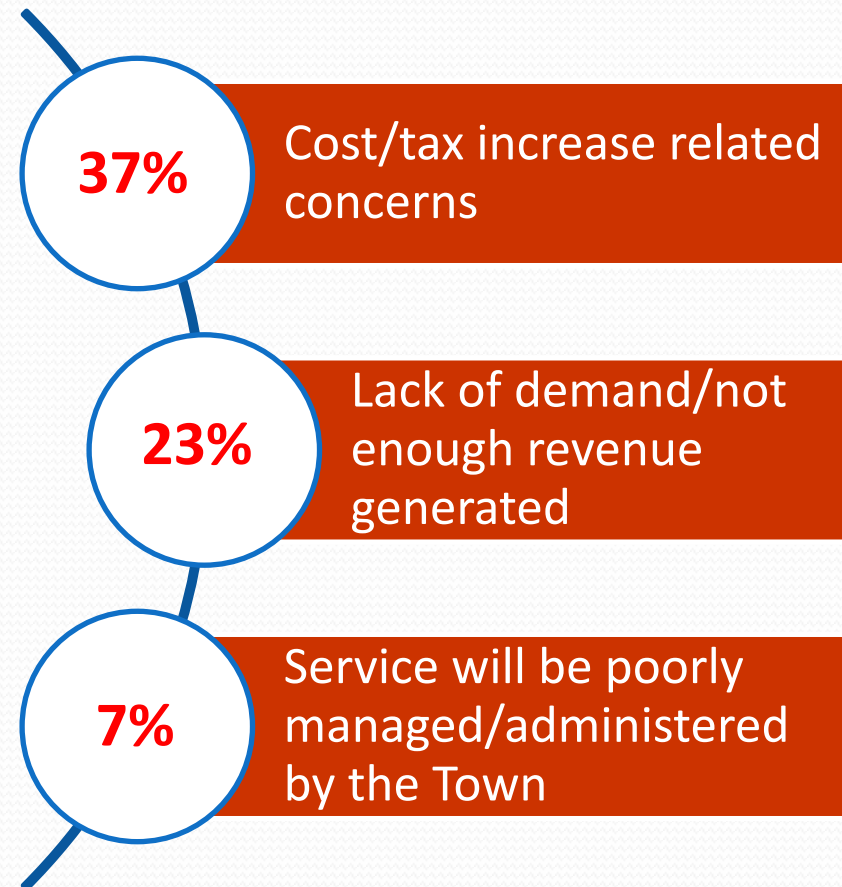


Benefits/Concerns with Option A

Benefits



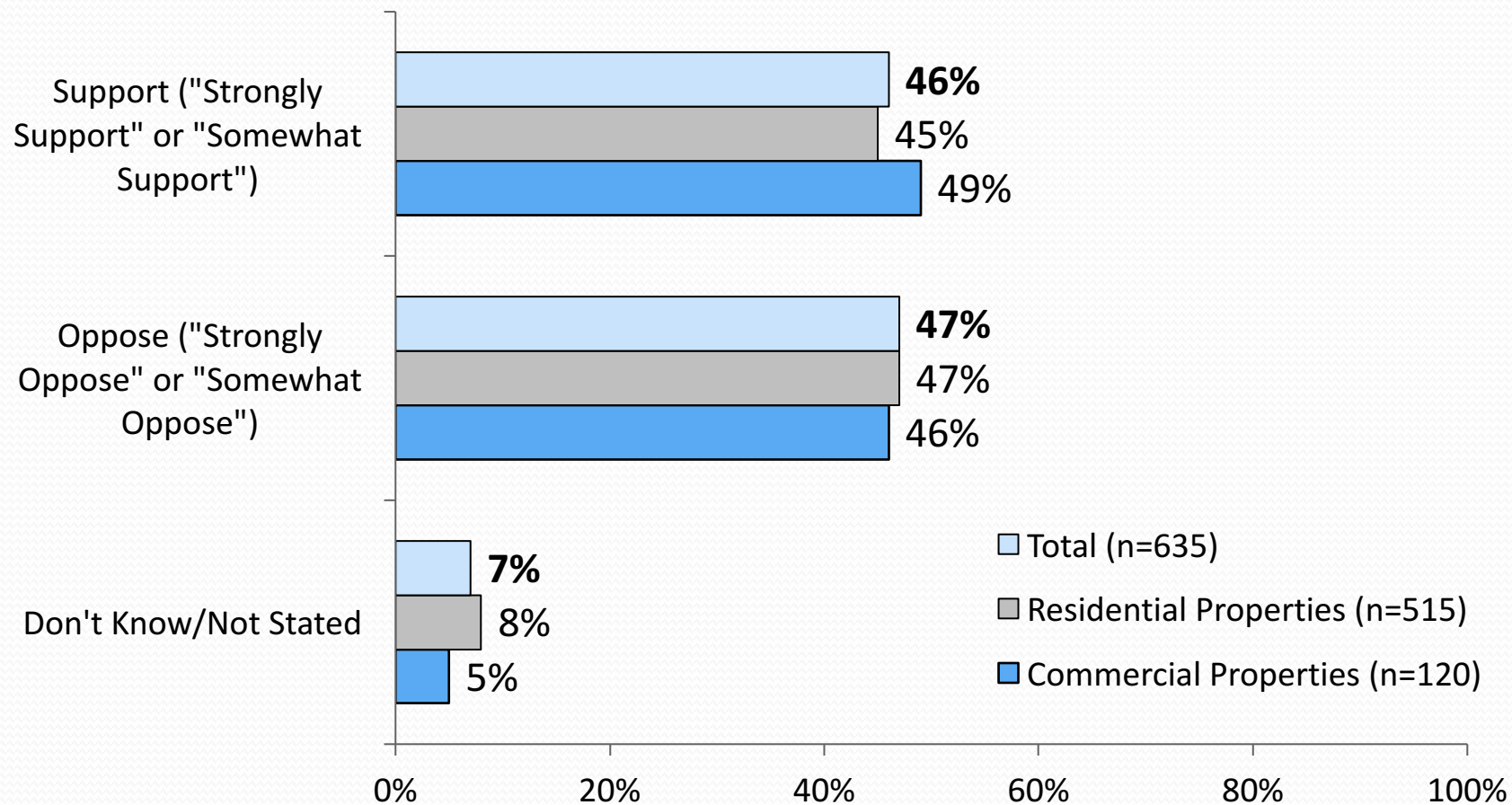
Concerns





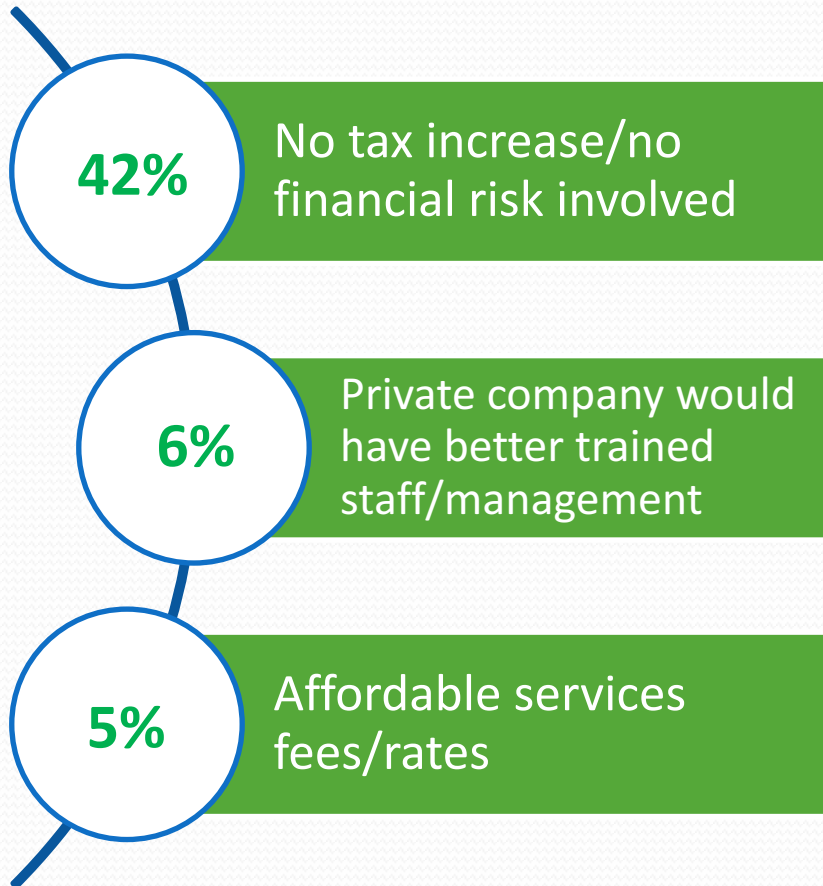
Support for Fibre Optic Installation

How strongly would you support or oppose the Town of Sundre inviting a private company to install a fibre optic network with zero Town contribution? (Option B)

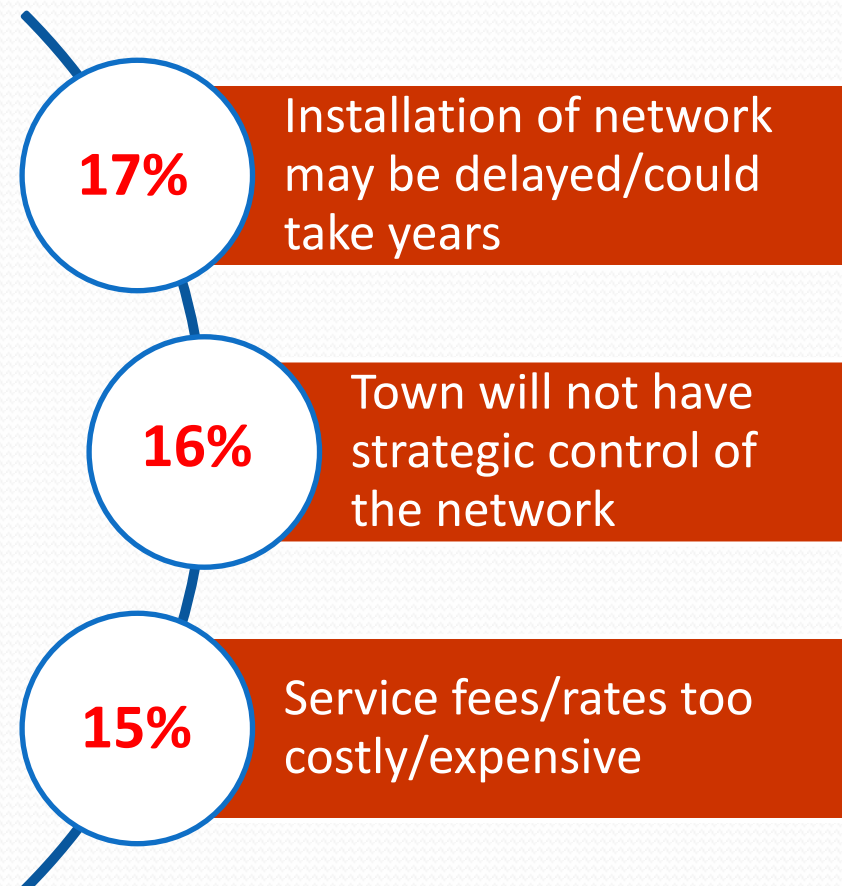


Benefits/Concerns with Option B

Benefits



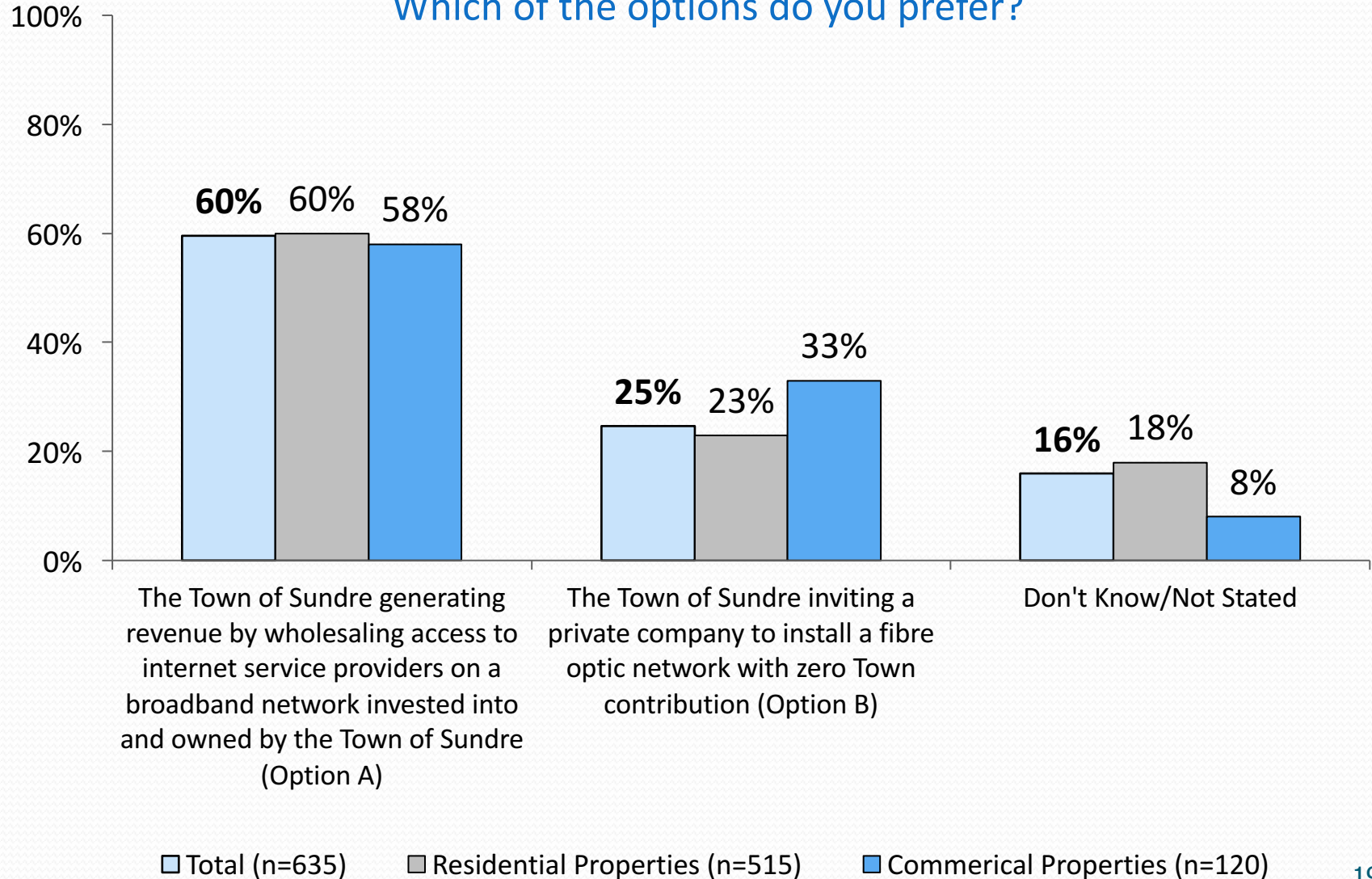
Concerns





Option Preference

Which of the options do you prefer?





Questions?