



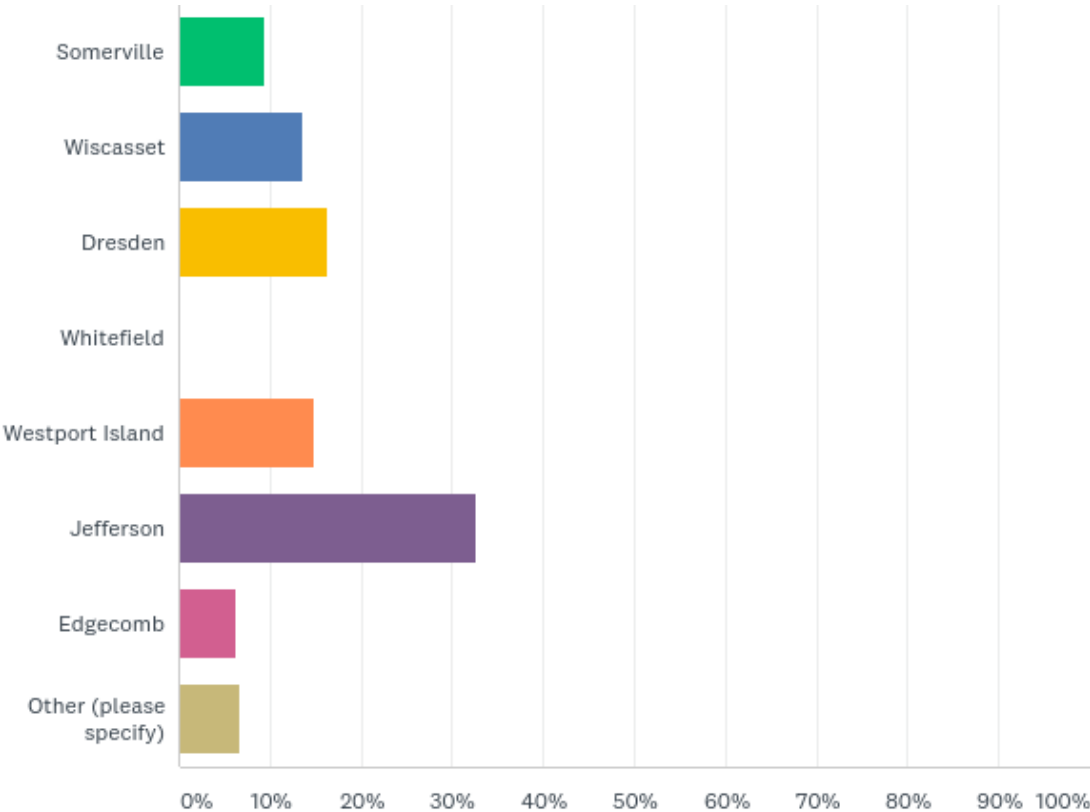
Memo

To: Lincoln County Broadband Committee
From: Mark Ouellette, Axiom
Date: January 29, 2019

Re: Survey Analysis

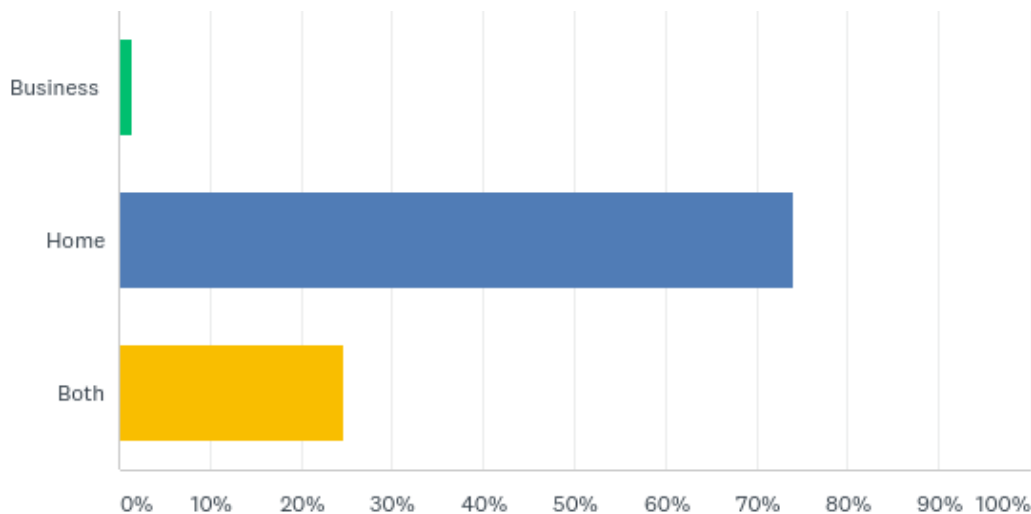
Background:

The surveys are one part of the elements of a Phase I ConnectME Planning process. These surveys can help identify issues in communities, help communities better understand constituent issues and generally be one element of support for moving to Phase II. The more responses, the more likely that your community is not happy with their current service. Overall the survey had 362 responses, this does not include Whitefield, which had already completed a survey and is analyzed in a separate memo.



ANSWER CHOICES	RESPONSES	
Somerville	9.39%	34
Wiscasset	13.54%	49
Dresden	16.30%	59
Whitefield	0.28%	1
Westport Island	14.92%	54
Jefferson	32.60%	118
Edgecomb	6.35%	23
Other (please specify)	6.63%	24
TOTAL		362

Q3: Is this location your home, business or both?

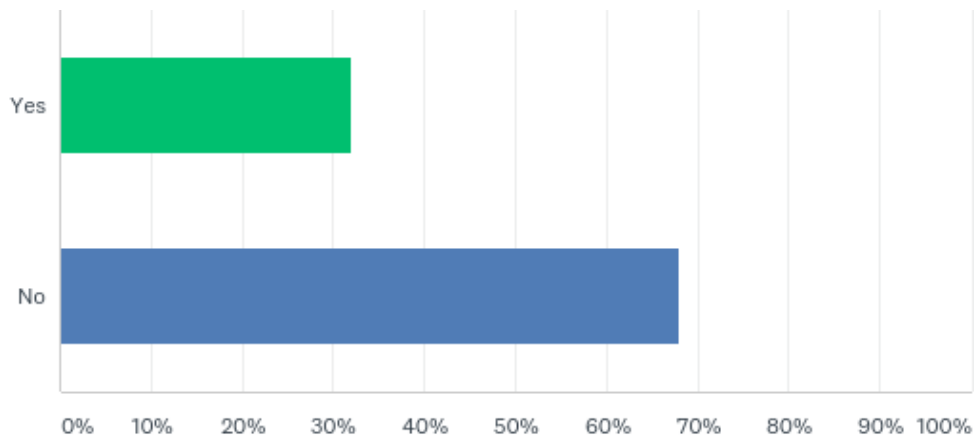


Interestingly, just under 25% of respondents (89) worked from home or had a home business. This is an important statistic to help communities understand the importance of residential service.

Below is the list of providers in your area, not surprisingly Spectrum and Consolidated Communications are by far the most ubiquitous across the area. One small issue with the survey. We listed LCI as one of the providers, and received 4 responses. In the “Other” category, a number of people listed their provider as Tidewater, which is the same company as LCI, so the number of LCI customers is underrepresented, and is closer to 5% of the respondents.

ANSWER CHOICES	RESPONSES	
Consolidated Communications (FairPoint Communications)	29.60%	103
Spectrum (Time Warner Cable)	37.36%	130
GWI	0.86%	3
Otelco (OT&T)	0.00%	0
TDS	0.29%	1
UniTel	0.00%	0
LCI	1.15%	4
Premium Choice	0.00%	0
Red Zone	3.74%	13
HughesNet (Satellite)	6.61%	23
Wi-Fi HotSpot (using your cellular phone)	5.75%	20
Other (please specify)	14.66%	51
TOTAL		348

Q6: Are you happy with your service?



ANSWER CHOICES	RESPONSES	
Yes	32.09%	112
No	67.91%	237
TOTAL		349

Q7: Here are some of the comments:

"The cost is high for my slow internet DSL connection and the basic (no long distance) phone service. Cable TV is not available in my area of Jefferson so I get TV via antenna connections. The town was short sighted when cable TV was 1st planned as selectmen didn't required the cable company to run cable all the way down Route 213 (Bunker Hill Rd)."

Consolidated Customer in **Jefferson**

"We don't have direct internet, we are using DLS (slow) and satellite (expensive)"

Consolidated and VistaNet customer in **Wiscasset**

"The connection drops on a daily basis. Sometimes this causes our phones to automatically jump over to data usage which -- which means we are paying for our internet use twice -- once with Consolidated, which is not working properly, and then with Verizon for data usage. Very frustrating and expensive."

Consolidated Customer on **Westport Island**

"Reliable, fast service"

Spectrum customer on **Westport Island**

"No high speed internet. Internet on both ends of my road but not the middle where there are like 10 houses im like 3000' away and im not serviceable but had internet in farm county wtf"

HugesNet customer in **Dresden**

"Expensive but high speed wifi/tv without interruption unlike prior satellite service."

Spectrum customer in **Edgecomb**

"It often flutters on and off and can be very slow."

Consolidated customer in **Jefferson**

Bundled service from Spectrum- \$236/month in **Edgecomb**

Bundled service from Spectrum \$175/month in **Jefferson**

"It's still slow despite that I have opted for a more costly plan. There are NO choices available in my town."

Consolidated customer in **Somerville**

"very expensive and hard to have multiple users"

TDS user in **Edgecomb**

"It's expensive and it's not fiber. I don't trust reliability and quality of my phone so i still have a landline. If I had fiber I would likely give up the landline and use internet for TV, which should be cheaper and better capacity and quality of internet."

Spectrum customer in **Wiscasset**

"I had no service for two weeks this summer following storm. I had to leave my lake camp and return to VA"

RedZone customer in **Jefferson**

"Slow, and is the only option for internet...streaming and loading email almost impossible".

Consolidated Customer in **Dresden**

"I have had spectrum (time Warner) for years. I pay over \$100 a month to have the fastest WiFi service thy offer and I've had nothing but problems non stop for the last year with them! The internet crashes multiple times a day, their customer service is horrible, I'm sick of having no other choice but them"

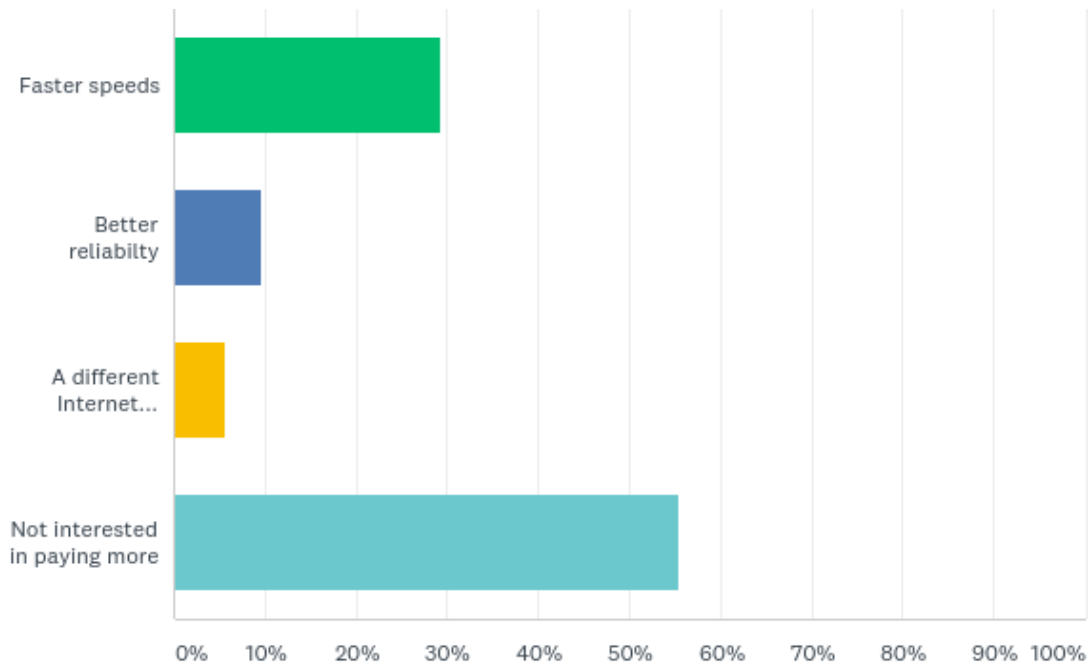
Spectrum customer in **Dresden**

“Satisfied because it's available. I'd be very interested in options other than Spectrum”
 Spectrum **Wiscasset** Customer

“For some reason does not work between hours of approx 4:30 and 8:30pm every single day. slow connection.”
 Consolidated customer in **Edgecomb**

“It is much better than DirecTv which we had before and was very scattered and sometimes we wouldn't have service for days, despite paying over double for this access. We have noticed more lapses and slowness lately, but overall we are satisfied with Fiber Optic internet.”
 LCI customer in **Edgecomb**

Q8: Would you be interested in paying more for one of the following?

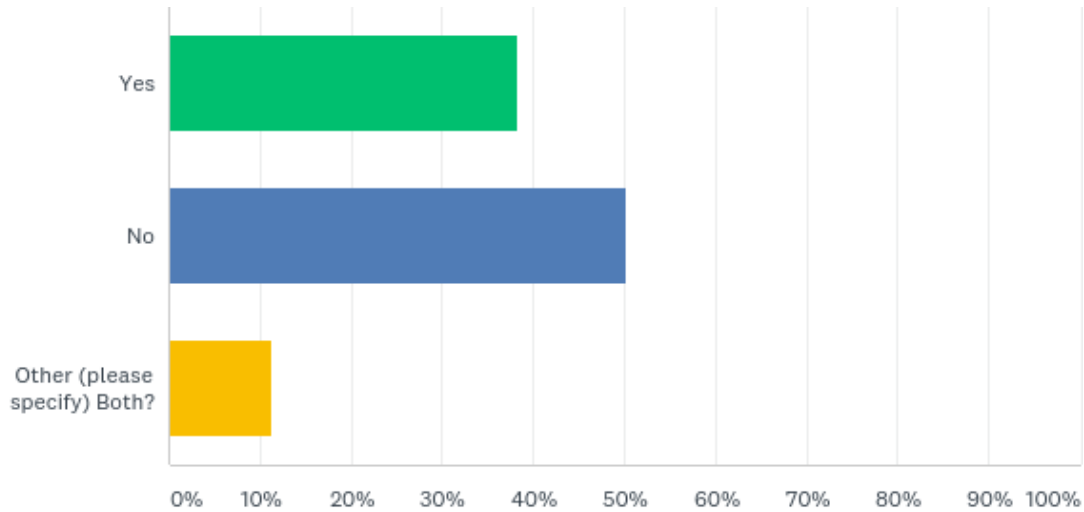


Interestingly, this is less of an unaffordability issue than the actual cost of the service, which is especially expensive for Satellite service. So when people say they do not want to spend more, it's typically because they are paying well over \$100 for service. There is some price sensitivity at lower costs, but not as great as the chart suggests.

Q9: Would you be interested in any of the following add on services? TELEVISION!

ANSWER CHOICES	RESPONSES	
Television	72.68%	141
Voice (Phone)	32.99%	64
Home Security	20.10%	39
Home Automation	9.28%	18
Other (please specify)	19.07%	37
Total Respondents: 194		

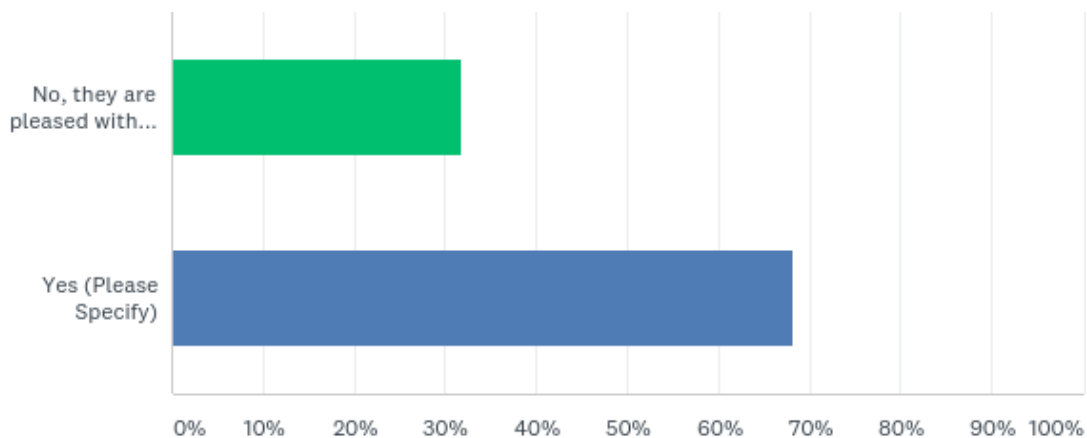
Related to Q3, Q10 asks Do you or anyone in your household work from home?



ANSWER CHOICES	RESPONSES	
Yes	38.33%	138
No	50.28%	181
Other (please specify) Both?	11.39%	41
TOTAL		360

While not particularly surprising, more people working from home, this point to the increasing importance of fast, reliable internet at the home- not just for businesses.

Q11: Those who work from home, are they frustrated



140 responded that they are frustrated, out of 205 responses.

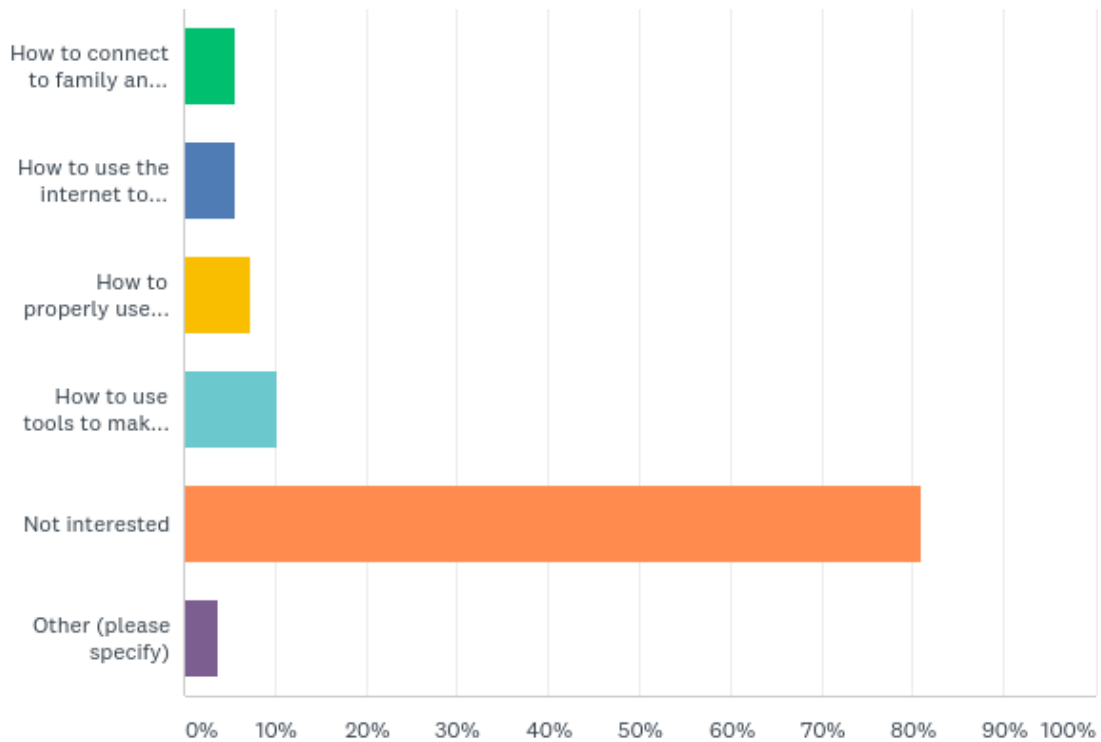
Q12: 25% (90) responded they telecommuted.

Q13: Do you have children or adults in your household who use the internet for homework or education?

ANSWER CHOICES	RESPONSES	
Yes	46.52%	167
No	53.48%	192
TOTAL		359

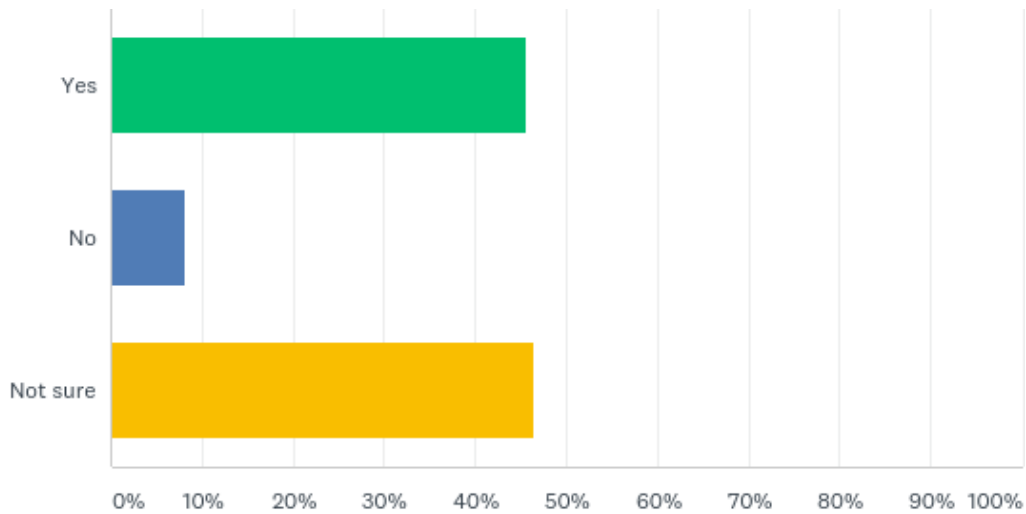
ANSWER CHOICES	RESPONSES	
School-age children	41.95%	73
Adult	71.84%	125
Other (please specify)	4.02%	7
Total Respondents: 174		

Q15: Interested in training?



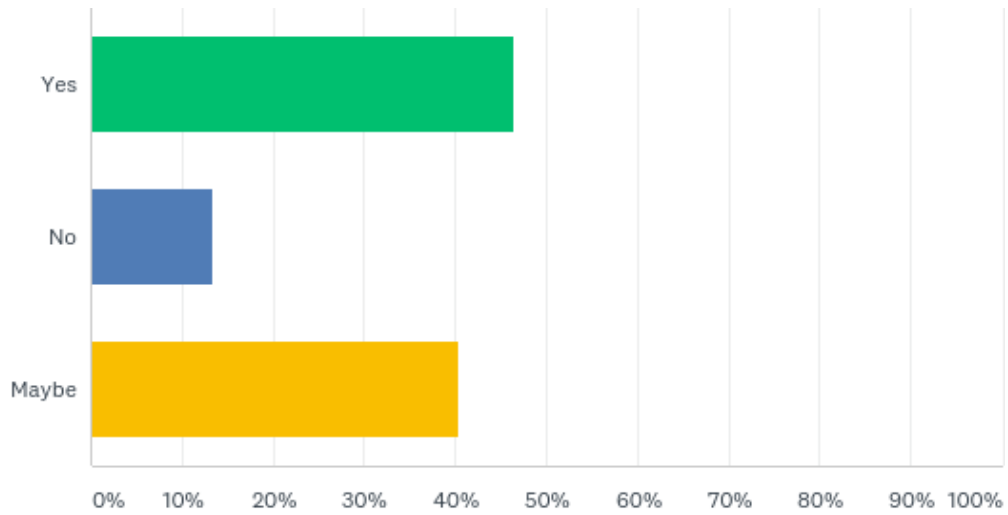
ANSWER CHOICES	RESPONSES	
How to connect to family and friends (Skype, FaceTime)	5.62%	19
How to use the internet to promote my business (Website creation, FaceBook, etc.)	5.62%	19
How to properly use Social Media (FaceBook, Twitter, LinkedIn, Instagram, etc.)	7.40%	25
How to use tools to make me more productive in my home or business (Word, Excel, PowerPoint, QuickBooks)	10.36%	35
Not interested	81.07%	274
Other (please specify)	3.85%	13
Total Respondents: 338		

Q17: Do you think more people would live in your town if there was better internet service available to them?



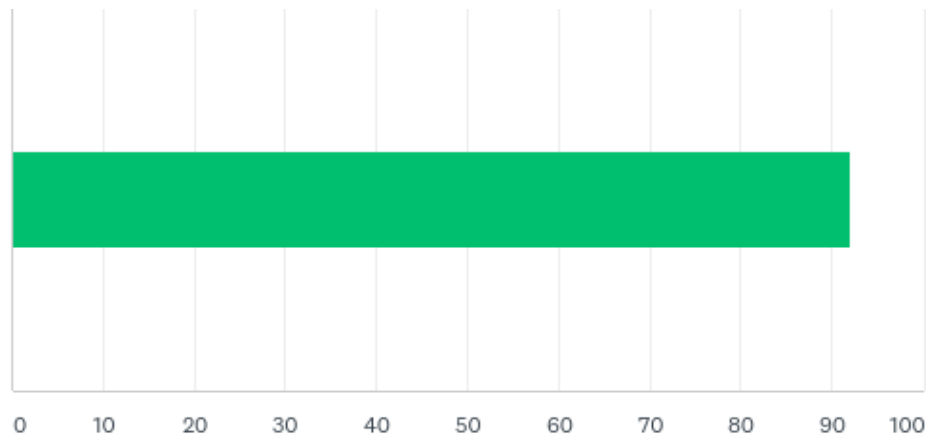
ANSWER CHOICES	RESPONSES	
Yes	45.56%	164
No	8.06%	29
Not sure	46.39%	167
TOTAL		360

Q18: Do you think visitors would stay longer if good internet were available where they were staying?



ANSWER CHOICES	RESPONSES	
Yes	46.39%	167
No	13.33%	48
Maybe	40.28%	145
TOTAL		360

Q20: On a scale of 1 to 100, with one being the least support and 100 being the most support, do you support Lincoln County's and your town's planning efforts to assist with internet improvements?



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	92	32,654	355
Total Respondents: 355			

Take Aways of the survey:

- People recognize how important internet connectivity is to their community, even from those that had good service
- Residential service is as important as business service because of large numbers of citizens that work from home
- Spectrum service generally is too expensive, Consolidated service is not reliable
- Other local providers also are frustrating people, except for LCI fiber
- Jefferson is a mess- a lot of providers, and no one happy
- Strong support for Lincoln County to help- much stronger than expected across all communities