



**STRATHCONA
COUNTY**

2020 Broadband Survey: Strathcona County Residents



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Communications

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I. Introduction and Purpose of the Study

In mid-May 2020, Strathcona County conducted two online surveys pertaining to high speed broadband usage. One survey was directed toward experiences and usage of broadband by residents, the other by business owners. It was possible for people to complete both surveys. This report presents results from County residents. Business experiences are summarized in a separate report.

Obtaining primary data directly from residents provides Strathcona County departments with information and enables County officials to make decisions that accurately reflect the perspectives and attitudes of residents.

This report provides a comprehensive review of all steps undertaken in the development and implementation of the survey, as well as a detailed summary of the results.

A review of the methodology associated in the development and implementation of the survey can be found in the next section of this report.

II. Methodology

A. The questionnaire

The questionnaire used in this study was newly created specifically for this study. The creation of questions was originally done by members of Strathcona County's Information Technology Services, along with input from Economic Development and Tourism. Wording modifications and other aspects associated with the development of the questionnaire was done by members of Survey Central. The only demographic question required for this survey was the household postal code, so that urban/rural locations could be identified.

In addition to location, up to 11 additional questions were asked in the residential broadband survey. These included:

- A question of whether there was an internet connection in the home and if not, why not;
- How important was having internet access in the home;
- Who was the current Internet service provider;
- How much per month was being spent on the existing internet service;
- What was the maximum download speed that the household was getting;
- What was the home internet being used for;
- How many devices in the home were accessing the internet;
- How were people rating their satisfaction with the internet services in terms of reliability, speed, value for the money they were spending and customer service;
- How much extra per month would they pay to upgrade their home internet service for a faster speed;
- What level of involvement should Strathcona County undertake to ensure that the community's future internet needs could be met?

Respondents were also asked if they would be interested in participating in a future workshop with other residents to learn more about internet options.

B. Sampling design and data collection procedure

The survey was made available online on two platforms. The first was through the Strathcona County Online Opinion Panel (SCOOP). The other was an open online survey where information was gathered with Survey Gizmo, which was geared toward those who were not members of SCOOP. As this survey was aimed at residents, those who did not live in the County were excluded from further analysis.

The online survey ran between May 15 and July 16, 2020, during which 1,463 County residents took part in the survey. Although online based data is based on people who decide to participate and were not randomly selected and have access to the online poll, the margin of error for a comparable probability-based random sample of the same size is $\pm 2.5\%$, 19 times out of 20. The data was analyzed by Strathcona County's Communications using SPSS for Windows.

III. RESULTS

This section of the report presents a summary of the results associated with the perceptions and actions of residents with respect to internet usage. In addition to overall results, urban and rural comparisons will be made throughout this report.

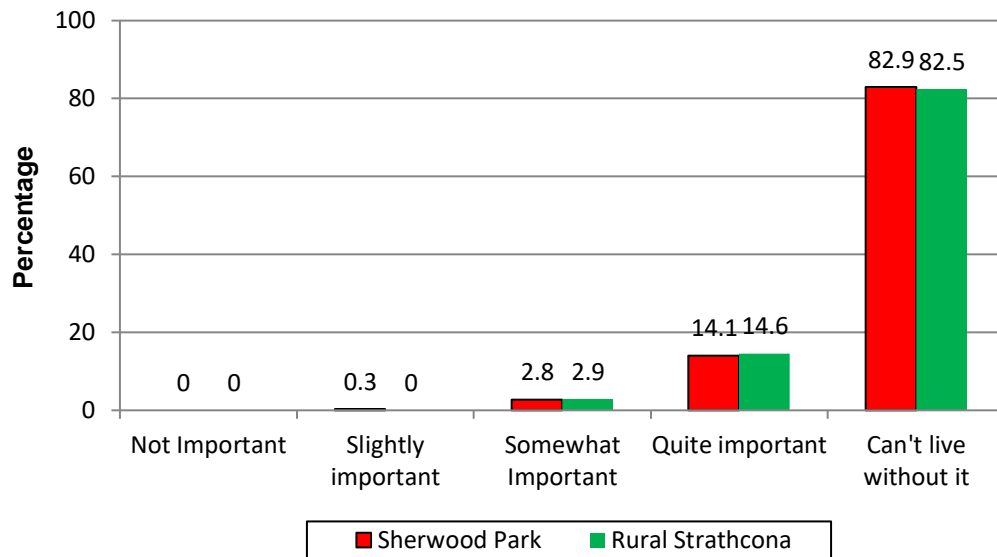
The final urban/rural split between residents was fairly close, where 54.5% (n=797) of the respondents lived in Sherwood Park and 45.5% (n=666) lived in rural Strathcona County. No other demographic information was collected.

Initially, respondents were asked if they currently had a wired internet connection. Overall, 97.8% of households did. Of the 2.2% who did not, the following primary reasons were given:

- The available internet speed is too slow at my location (33.3%);
- The monthly cost is too expensive (20%);
- It is not available at my location (20%);
- Did not know that internet was available (6.7%);
- Installation cost is too expensive (3.3%);
- Other people mentioned a combination of the above options, though a common theme was the cost and the lack of speed for the service.
- It should also be noted that the majority of reasons for not having home internet service came from people who lived in rural Strathcona.

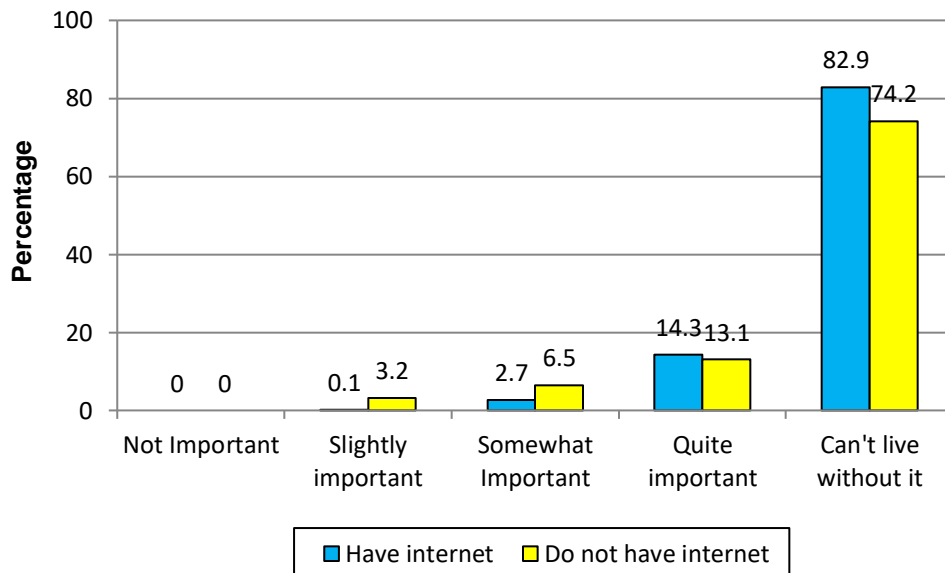
The overall results pertaining to the importance of internet access to residents in both the urban and rural areas are shown in Figure 1. It can be seen that the majority of respondents placed a high value on having internet access, regardless of where they lived in the County.

FIGURE 1
Importance of Internet Access



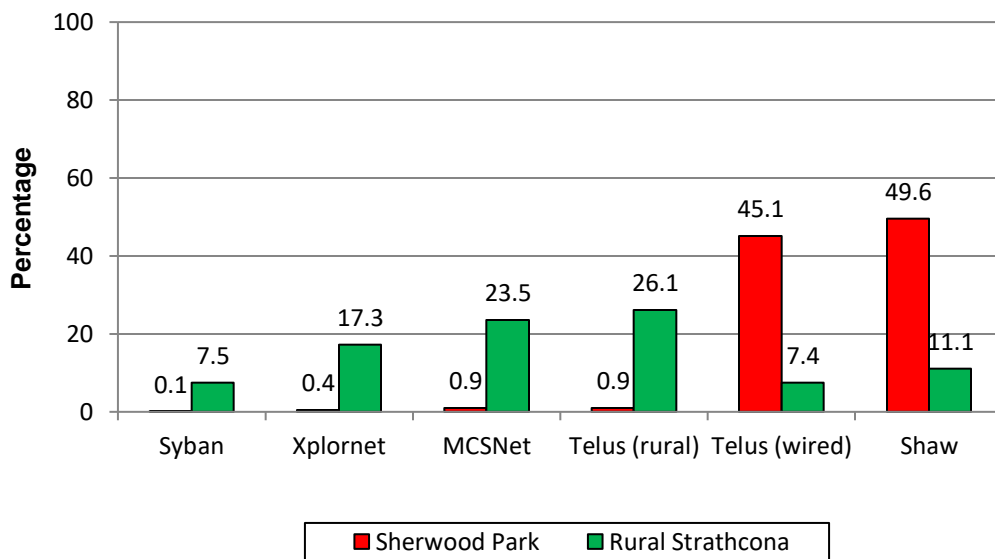
A comparison of how much importance internet access is to residents based on whether they currently have access is shown in Figure 2. It can also be seen that the majority who do not currently have access also place a high value on it.

FIGURE 2
Importance of Internet Access
By whether the Home currently has an Internet Connection



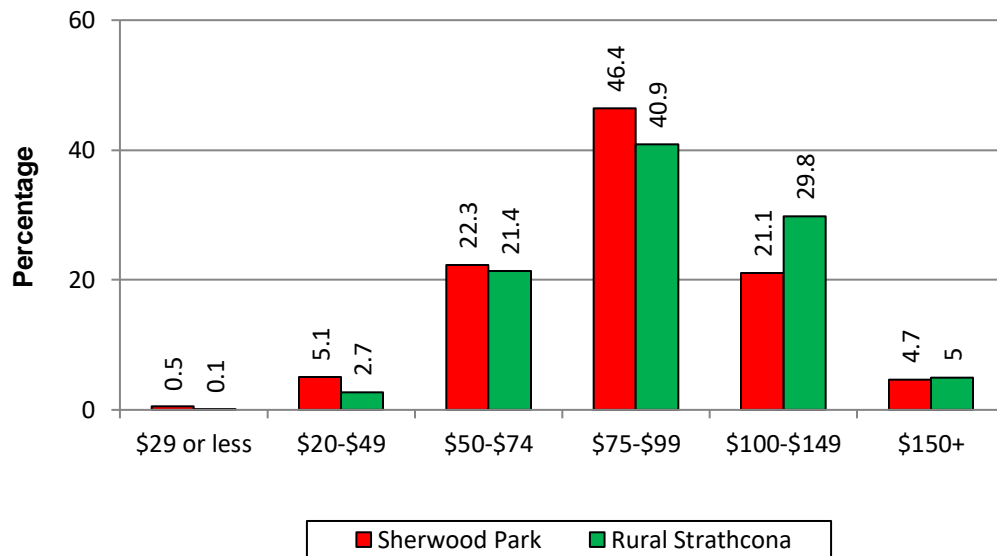
Those who have internet were asked who their current service provider was. It can be seen in Figure 3 that in Sherwood Park, there are two service providers used by the majority of residents – Shaw and Telus. In the rural area, a variety of service providers are used, with the leading ones being MCSNet , Telus (Rural Smart Hub) and Xplornet, and to a lesser extent, Shaw, Telus (wired) and Syban.

FIGURE 3
Major Internet Service Providers
Sherwood Park and Rural Strathcona



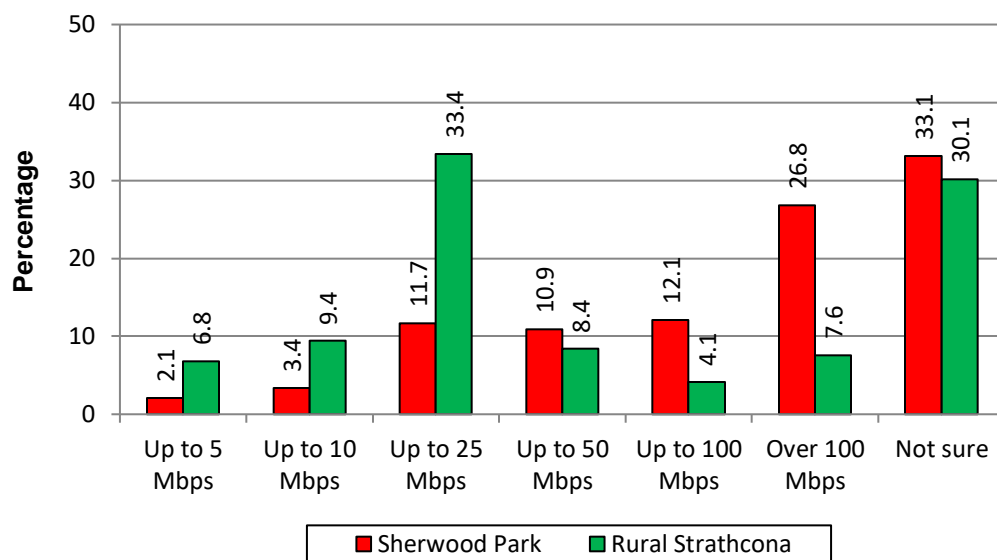
The monthly amount that people pay for their internet service is shown in Figure 4. It can be seen that the majority of residents pay \$75-\$99 monthly for their internet, and that a higher percentage of rural residents pay \$100-\$149 a month compared to those living in Sherwood Park.

FIGURE 4
Monthly Fees paid for existing Internet Service
Sherwood Park and Rural Strathcona



The download speeds that are provided by the account used by residents are shown in Figure 5. It appears that a considerably smaller percentage of rural residents are able to get fast download speeds of their internet compared to those living in Sherwood Park. The majority of rural residents who thought they knew what their download speeds were thought they were getting up to 25 megabytes per second (compared to nearly half of urban residents who were experiencing up to 100 mbps [or greater]). It should also be noted that approximately one third of urban and rural residents are unsure of what their download speeds actually are.

FIGURE 5
Download speeds
Sherwood Park and Rural Strathcona



All residents who currently had internet were asked to indicate what they used their home internet for. From a list of published options, the following trends were observed:

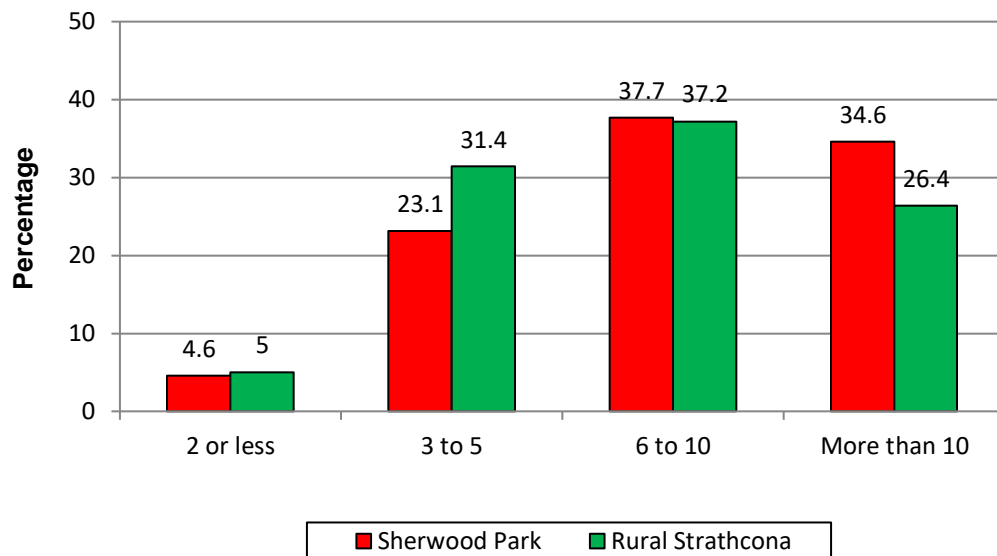
- **Basic internet** (check email, Facebook, etc.) – 95.7% urban users & 97.2% rural users.
- **Video streaming** (Apple TV, Crave, Netflix, YouTube, etc.) – 81.7% urban users & 84.3% rural users.

- **Voice and Video** (FaceTime, Skype, WhatsApp, etc.) – 81.5% urban users & 74% rural users.
- **Cloud services and storage** (iCloud, One Drive, Google Drive, etc.) – 66.3% urban users & 61.7% rural users.
- **Telecommuting** (VPN, Web Conferences, etc.) – 57% urban users & 54.8% rural users.
- **Gaming** – 47.7% urban users & 39.3% rural users.
- **Security** (RING, etc.) – 25.7% urban users & 26.2% rural users.
- **Home-based business** – 24.1% urban users & 30.1% rural users.
- **Other** – 11.4% urban users & 13.7% rural users. Overall, this included many changes that have occurred since the onslaught of COVID-19, including working from home, online school for children or for adults (e.g. University, online courses), banking and other financial related activities, and other forms of entertainment.

With few exceptions, the usage patterns of the internet were the same for both urban and rural residents. The largest spreads occurred with *voice and video* and *gaming*, where a larger percentage of urban residents used these forms of internet use compared to rural residents. However, on a proportionate basis, a higher percentage of rural residents used the internet for a home-based business compared to those living in the urban area.

A comparison of the number of devices in the home that can use internet access is summarized in Figure 6. The majority of households in both urban and rural Strathcona generally had between 6 and 10 devices. A higher proportionate percentage of urban residences had more than 10 devices compared to those living in rural residences.

FIGURE 6
Number of devices that use internet access
Sherwood Park and Rural Strathcona



Residents were then asked to rate their satisfaction levels with their current internet service in four areas – *reliability*, *speed*, *value* and *customer service*. In general, it was found that levels of dissatisfaction were higher among rural residents and compared to those living in Sherwood Park. Figures 7 through 10 cover each aspect of internet service. Overall, rural residents expressed greater dissatisfaction with the reliability of the internet (Figure 7) and the speed of the internet (Figure 8) compared to urban residents. Both urban and rural residents expressed dissatisfaction with the value of the service based on what they were paying for (Figure 9). However, both urban and rural residents were generally satisfied or were neutral with respect to customer service (Figure 10).

FIGURE 7
Level of satisfaction with internet service - Reliability
Sherwood Park and Rural Strathcona

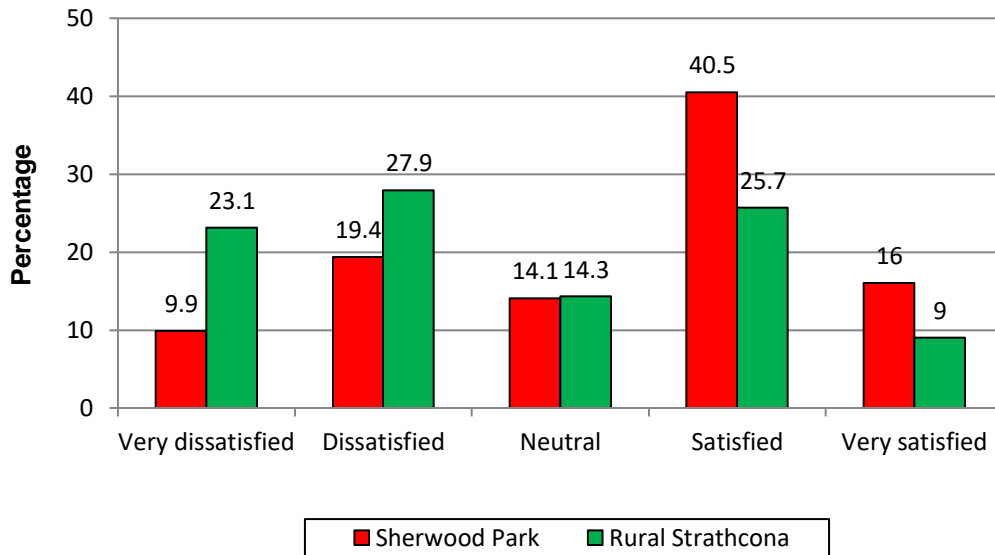


FIGURE 8
Level of satisfaction with internet service - Speed
Sherwood Park and Rural Strathcona

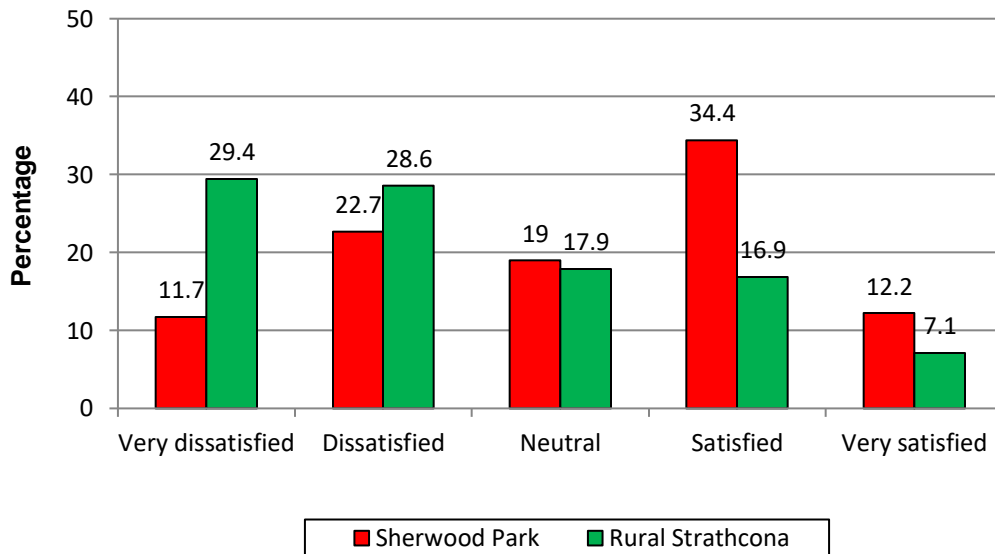


FIGURE 9
Level of satisfaction with internet service - Value
Sherwood Park and Rural Strathcona

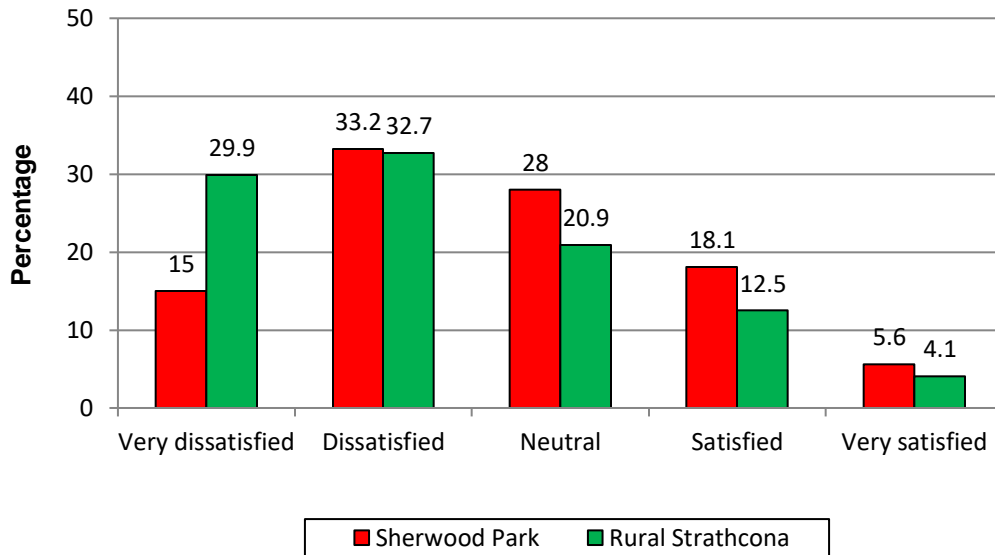
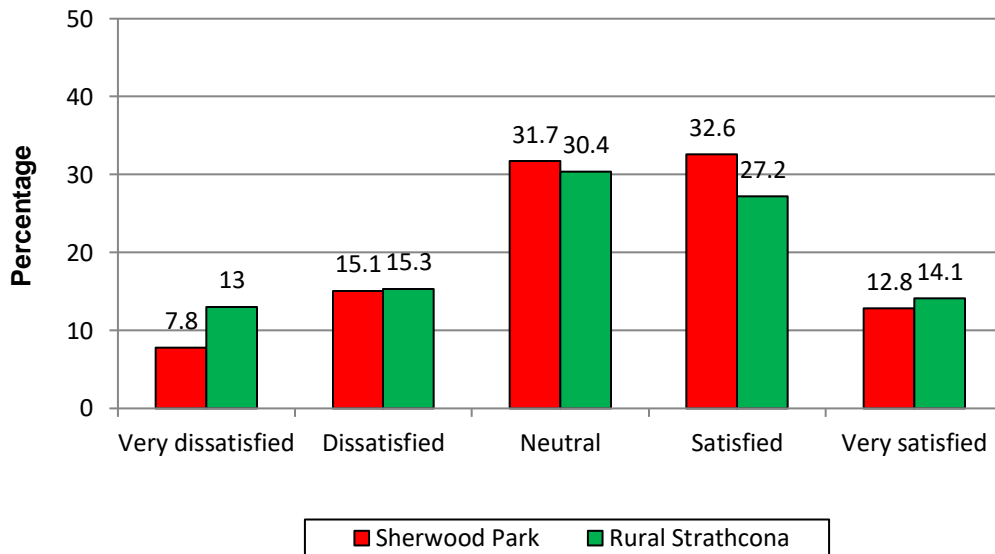


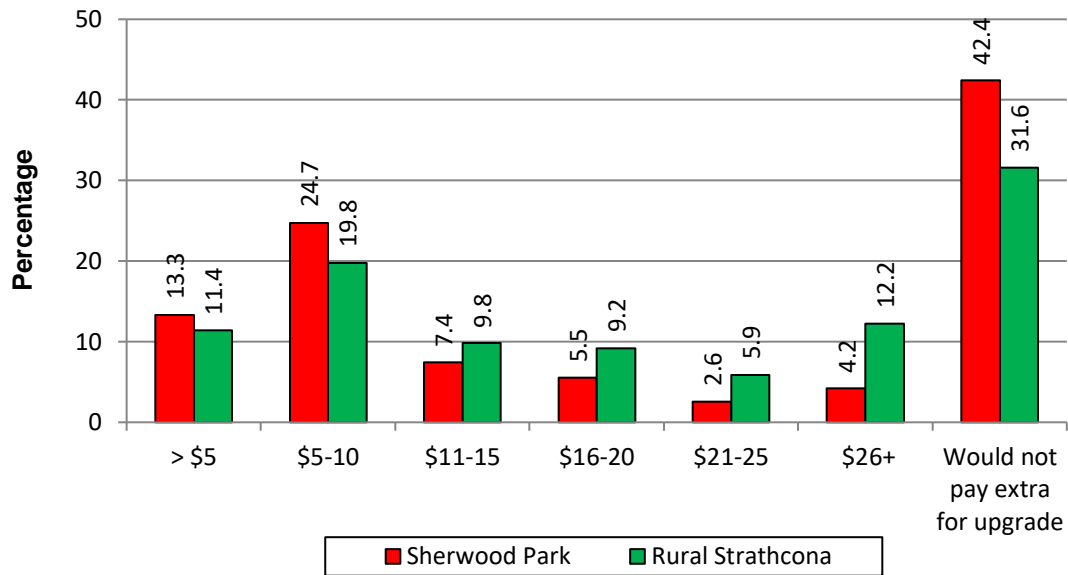
FIGURE 10
Level of satisfaction with internet service – Customer Service
Sherwood Park and Rural Strathcona



Residents were then asked to indicate how much extra (per month) that they would be willing to pay to upgrade their home internet to faster speeds. It can be seen from Figure 11 that the majority of residents would

not pay any additional fees for an upgrade. Although it is sporadic, rural residents would entertain a range of prices for upgrading their service compared to urban residents. About a quarter of urban residents would be willing to pay between \$5 and \$10 a month for an upgrade.

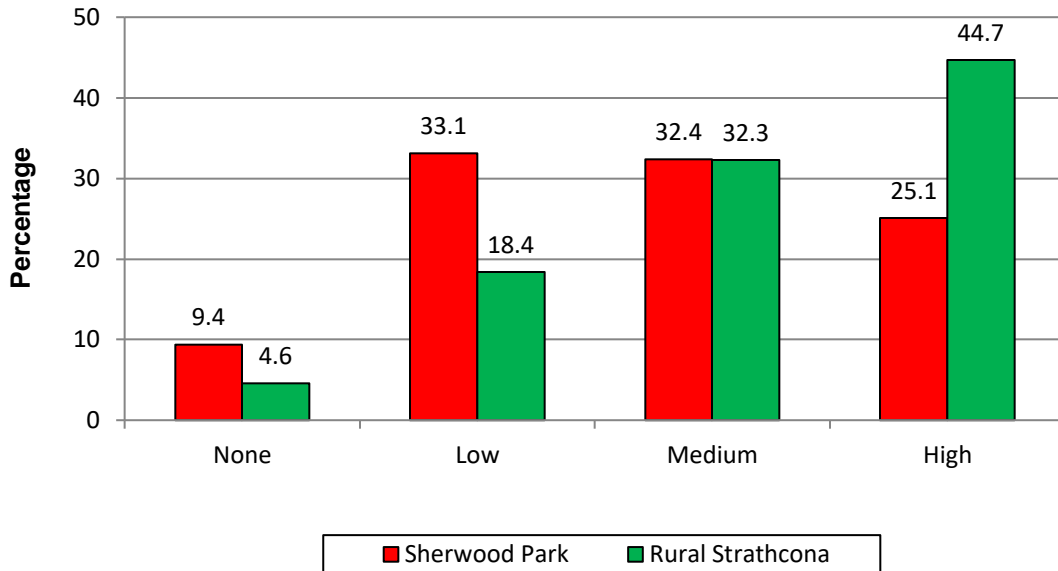
FIGURE 11
Additional monthly cost to upgrade the internet
Sherwood Park and Rural Strathcona



When asked about level of involvement by Strathcona County, it can be seen from Figure 12 that the majority of urban residents felt that there should either be low involvement, where the County should encourage and/or support the private sector, but not make any capital investment, or a medium involvement, where the County should consider investment or subsidies.

Among rural residents, the majority were leaning toward either a medium involvement or a high involvement, where the County would partner with the private sector and/or invest in taxpayer funding. Very few residents from either the urban or rural settings believed that the County should not have any involvement pertaining to internet needs.

FIGURE 12
Level of involvement by Strathcona County with high speed internet
Sherwood Park and Rural Strathcona



Overall, 31.2% of Sherwood Park residents and 42.1% of rural residents consented to potentially take part in a workshop with other residents to learn more about internet options. Those who were interested signed up on a different page separate from the survey.