



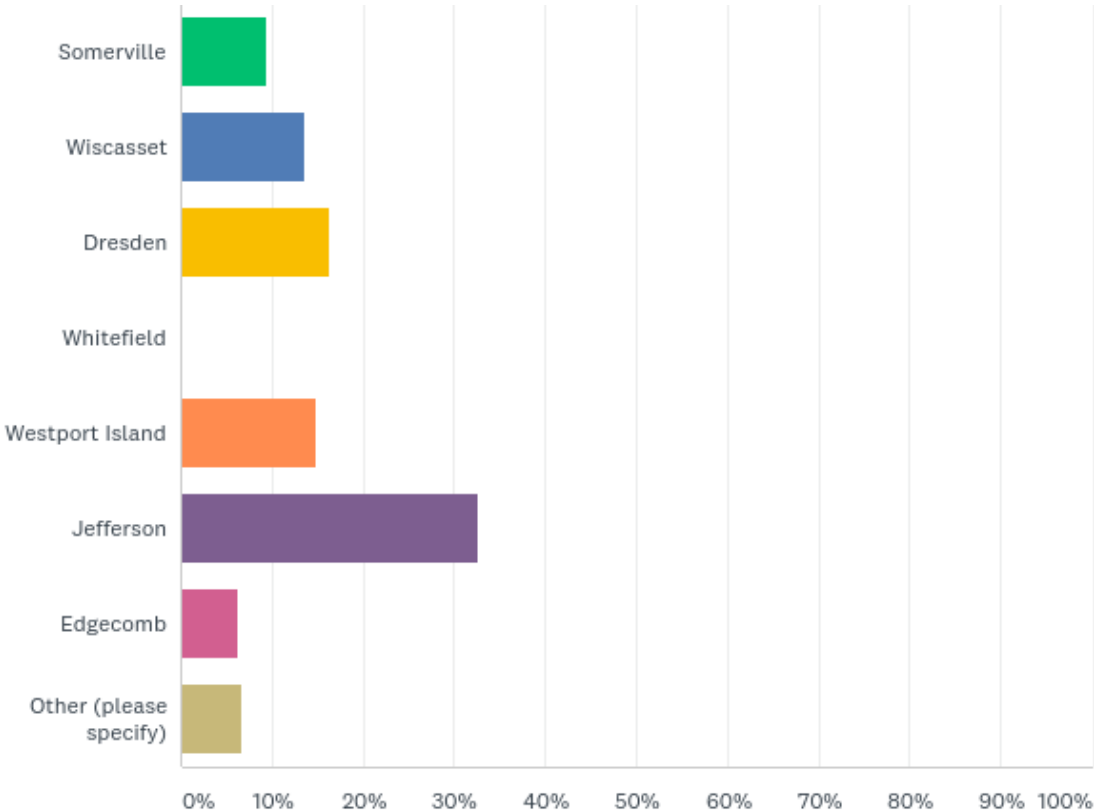
Memo

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

Re: Survey Analysis

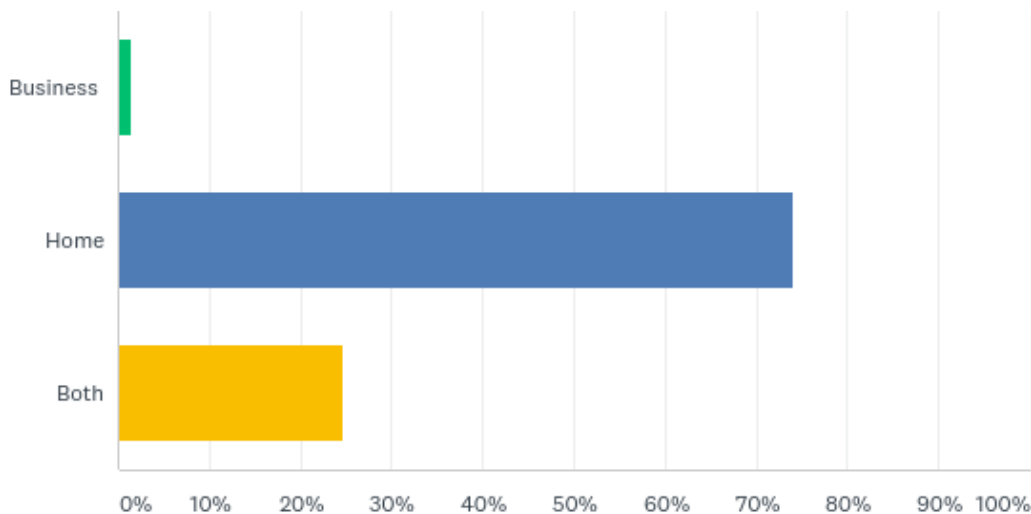
Background:

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?

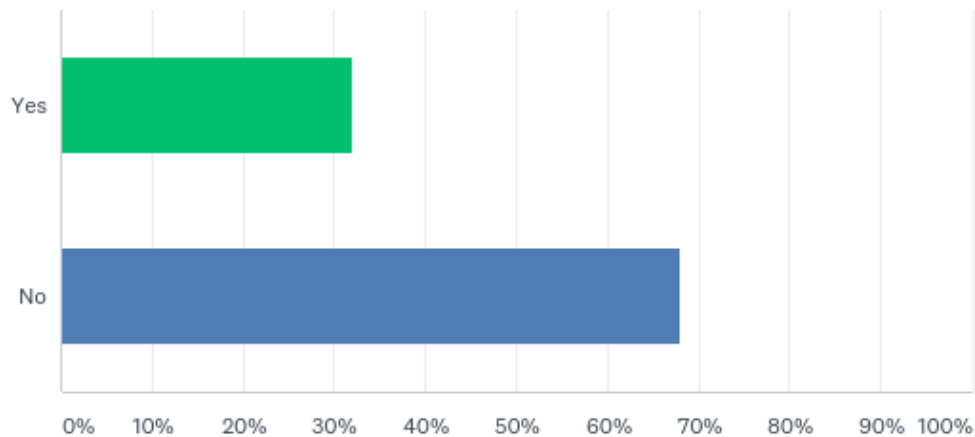


Interestingly, just under 25% of respondents (89) worked from home or had a home business. This is an important statistic to help communities understand the importance of residential service.

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"

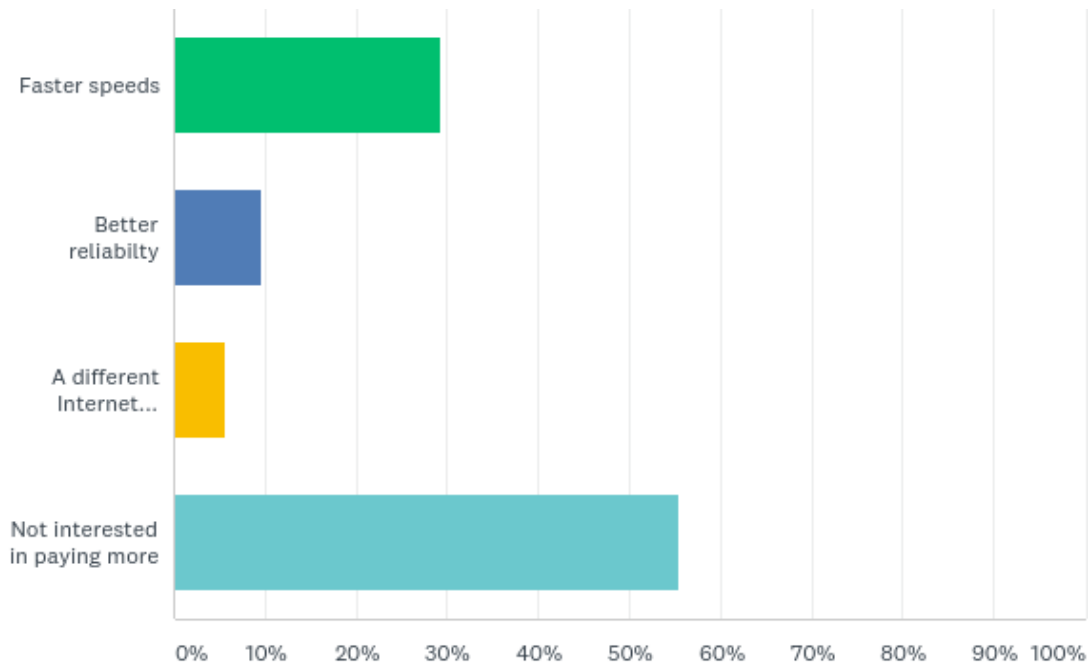
Spectrum customer in **Dresden**

“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?

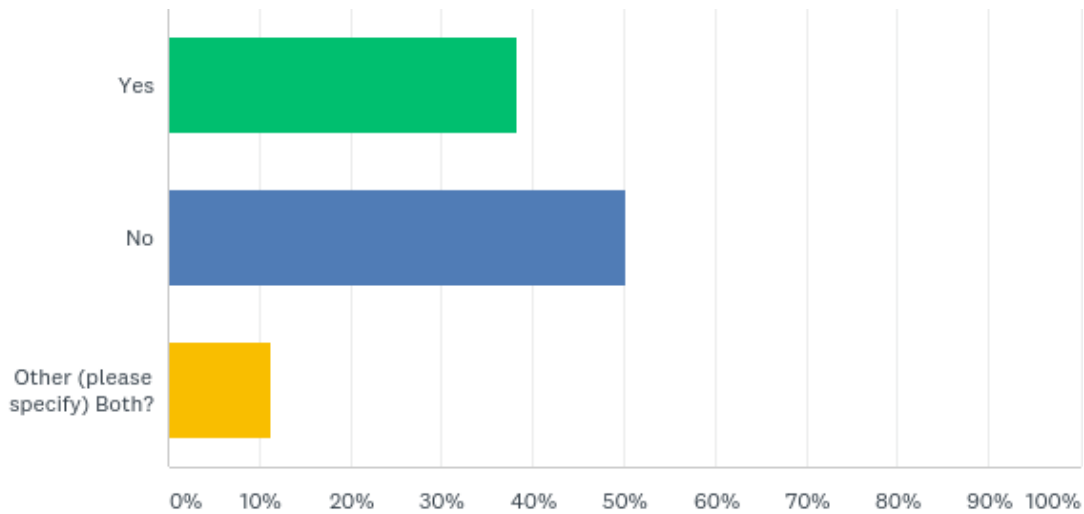


Interestingly, this is less of an unaffordability issue than the actual cost of the service, which is especially expensive for Satellite service. So when people say they do not want to spend more, it's typically because they are paying well over \$100 for service. There is some price sensitivity at lower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

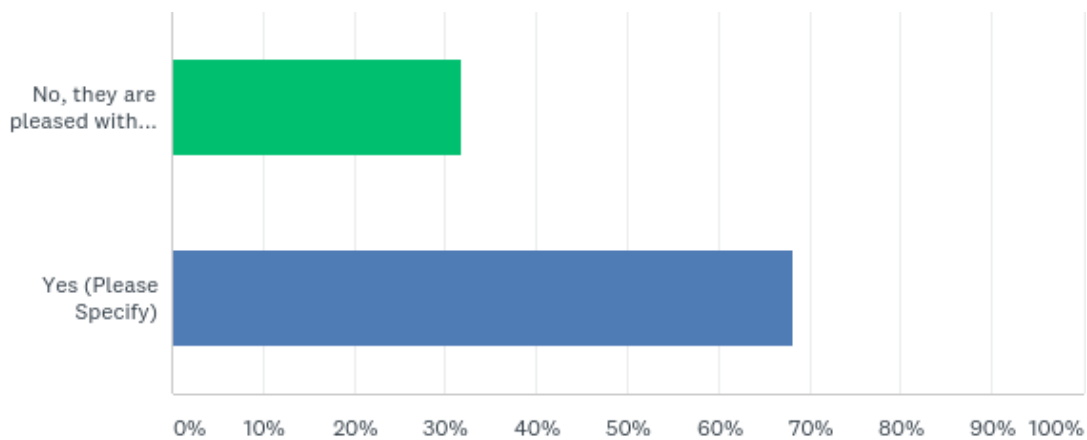
Related to Q3, Q10 asks Do you or anyone in your household work from home?



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.

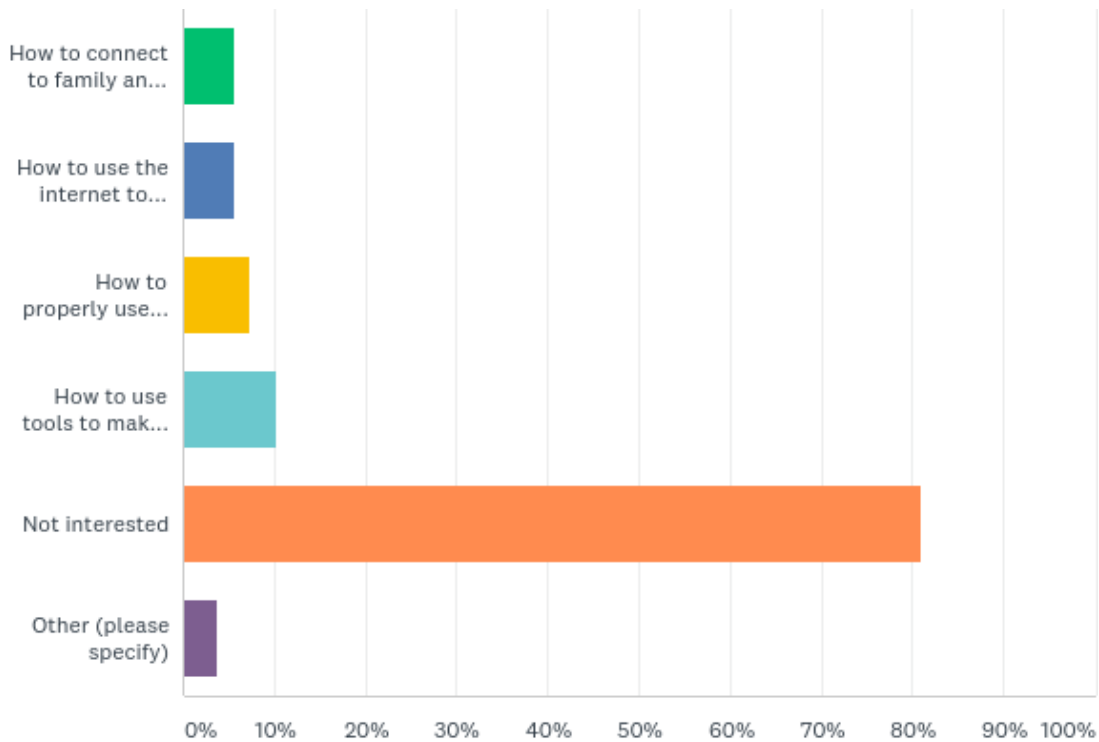
Q12: 25% (90) responded they telecommuted.

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

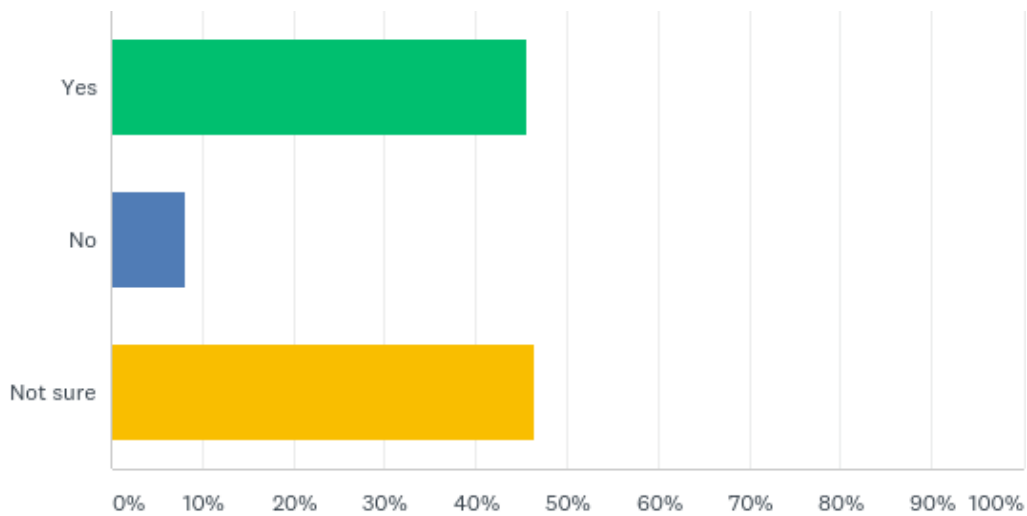
ANSWER CHOICES	RESPONSES	
School-age children	41.95%	73
Adult	71.84%	125
Other (please specify)	4.02%	7
Total Respondents: 174		

Q15: Interested in training?



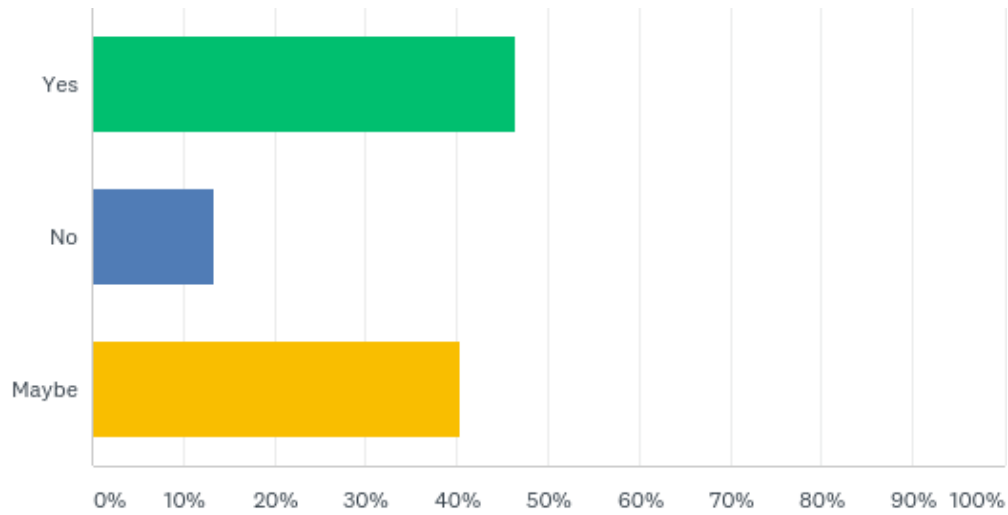
ANSWER CHOICES	RESPONSES	
How to connect to family and friends (Skype, FaceTime)	5.62%	19
How to use the internet to promote my business (Website creation, FaceBook, etc.)	5.62%	19
How to properly use Social Media (FaceBook, Twitter, LinkedIn, Instagram, etc.)	7.40%	25
How to use tools to make me more 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?



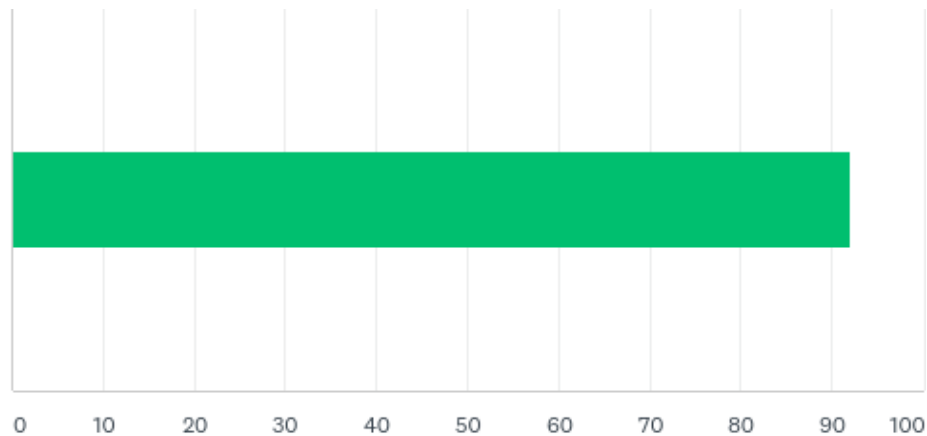
ANSWER CHOICES	RESPONSES	
Yes	45.56%	164
No	8.06%	29
Not sure	46.39%	167
TOTAL		360

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:

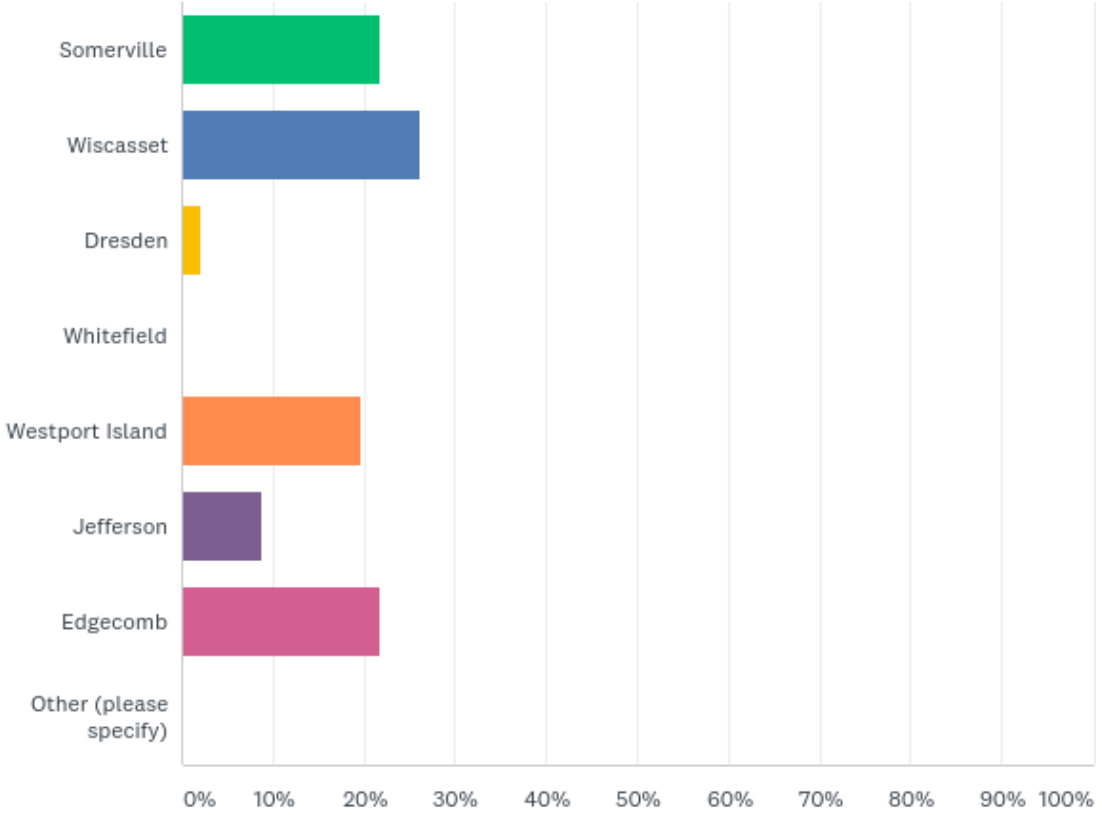
- People recognize how important internet connectivity is to their community, even from those that had good service
- Residential service is as important as business service because of large numbers of citizens that work from home
- Spectrum service generally is too expensive, Consolidated service is 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



Memo

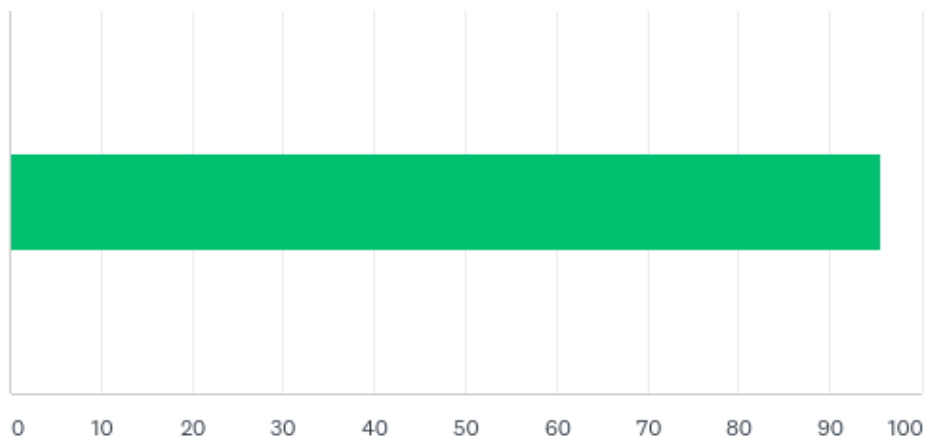
To: Lincoln County BB Committee
Fr: Mark Ouellette, Axiom
Date: January 30, 2019
Re: Business Surveys

We have received 46 business surveys from across the region, including 10 from Whitefield that were obtained separately. The results in Whitefield were similar to the results described here.



ANSWER CHOICES	RESPONSES	
Somerville	21.74%	10
Wiscasset	26.09%	12
Dresden	2.17%	1
Whitefield	0.00%	0
Westport Island	19.57%	9
Jefferson	8.70%	4
Edgecomb	21.74%	10
Other (please specify)	0.00%	0
TOTAL		46

Q2: How important is the internet to your business?

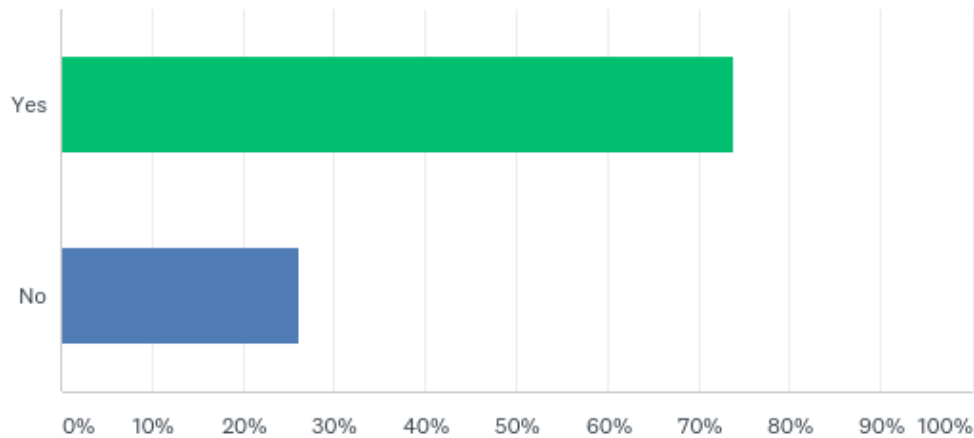


ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	96	4,306	45
Total Respondents: 45			

Q4: I would increase my business revenue if...

ANSWER CHOICES	RESPONSES	
I could work or sell more efficiently online	69.77%	30
My employees were better trained	13.95%	6
I understood and could implement the latest online tools	27.91%	12
I had updated computer software	30.23%	13
The pool of skilled employees increased	13.95%	6
I'm not sure	18.60%	8
Total Respondents: 43		

Q6: Do you have a website?



12 respondents do not have a website.

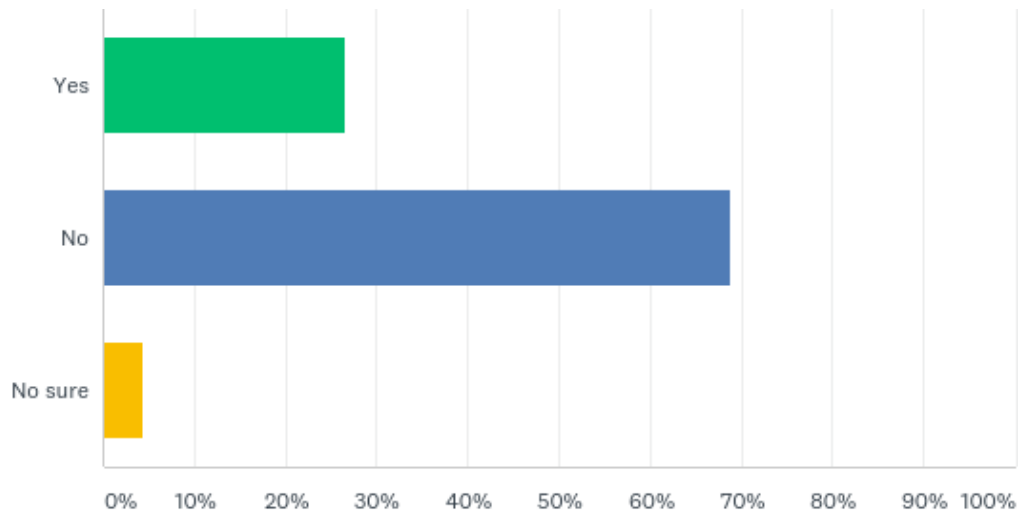
Q12: What does your business use the internet for?

ANSWER CHOICES	RESPONSES	
On-line sales	71.74%	33
On-line purchasing of inventory	71.74%	33
Webinars, Skype, Video	69.57%	32
File or data sharing (outside of your internal network)	71.74%	33
Data management, back-up or data storage	63.04%	29
Operations in the Cloud (Accounting, Sales, Project Management, Inventory, etc.)	34.78%	16
Hosting your own server(s)	19.57%	9
Social Media (FaceBook, Twitter, Instagram)	71.74%	33
Other (please specify)	23.91%	11
Total Respondents: 46		

Q13: How important is improved internet service to your business now?

ANSWER CHOICES	RESPONSES	
Not important, current service meets our needs	13.04%	6
Important, we don't have everything we want, but we can make do	32.61%	15
Critically important, current internet does not meet our needs	43.48%	20
We don't know and would like to learn more	2.17%	1
Other (please specify)	8.70%	4
TOTAL		46

Q15: Over the past few years have internet speeds kept up with your business needs?



ANSWER CHOICES	RESPONSES	
Yes	26.67%	12
No	68.89%	31
No sure	4.44%	2
TOTAL		45

Q17: What type of Broadband does your business have?

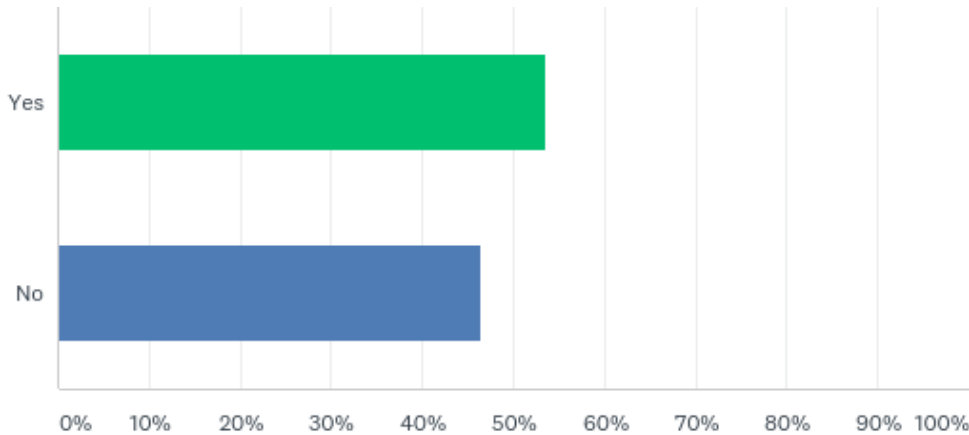
ANSWER CHOICES	RESPONSES	
Fiber	13.33%	6
DSL	35.56%	16
T1	2.22%	1
Cable	24.44%	11
Wireless	8.89%	4
Satellite	8.89%	4
Celular	2.22%	1
Other (please specify)	4.44%	2
TOTAL		45

Those that have fiber are happy, those with satellite, cellular and wireless are unhappy. And those with a cable connection or DSL have individual responses, typically based on reliability or cost.

Q18: Who is your provider?

ANSWER CHOICES	RESPONSES	
Consolidated Communications (formerly FairPoint)	41.30%	19
Spectrum (formally Time Warner Cable)	23.91%	11
GWl	2.17%	1
LCI	6.52%	3
Otelco (formally OT&T)	0.00%	0
TDS	0.00%	0
UniTel	0.00%	0
Premium Choice	0.00%	0
Red Zone	2.17%	1
HughesNet (satellite service)	4.35%	2
Wi-Fi HotSpot (using your cellular phone)	2.17%	1
Other	0.00%	0
Other (please specify)	17.39%	8
TOTAL		46

Q20: Does your business allow employees to telecommute?



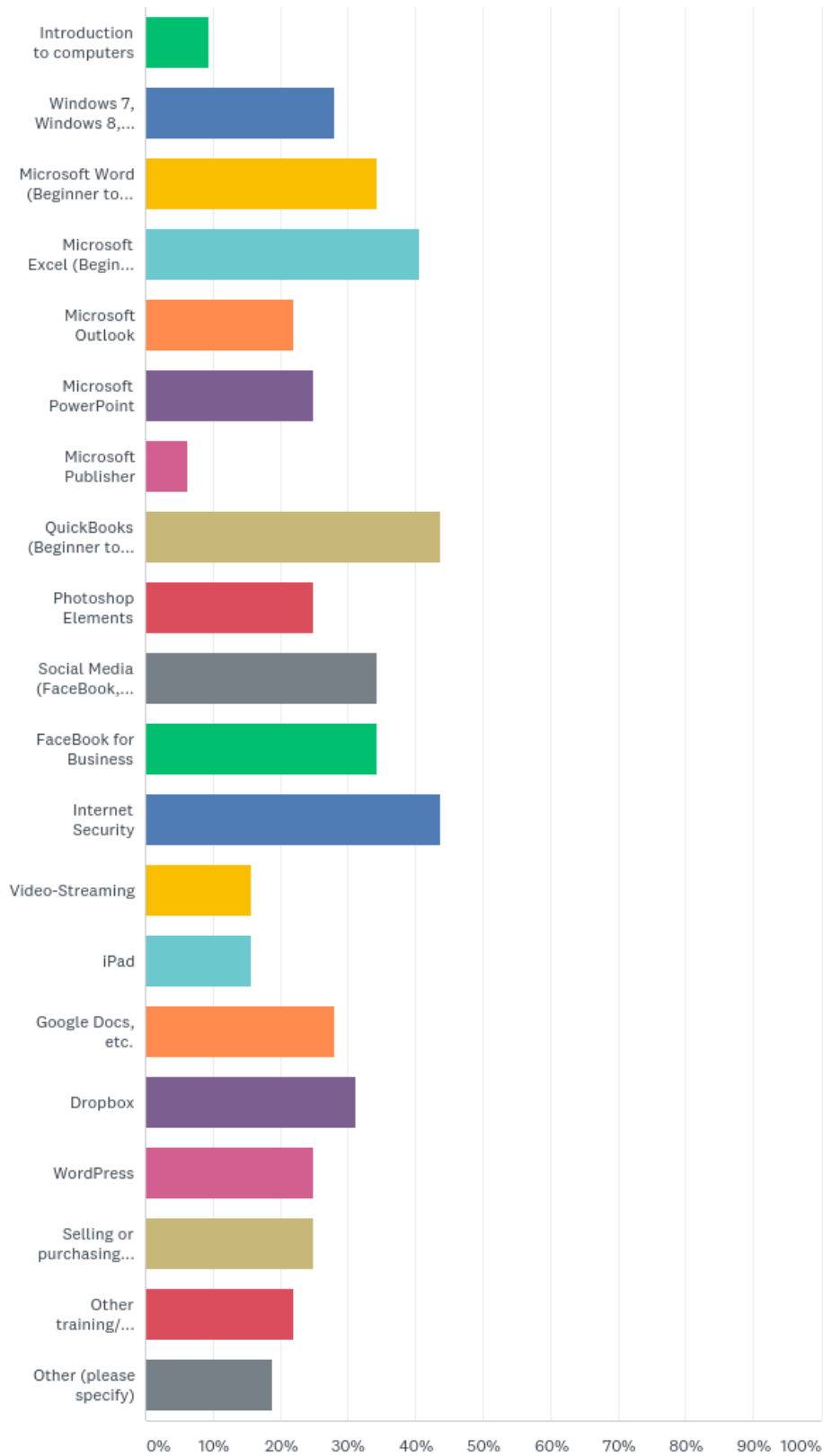
Speaks to importance of residential connection in our modern society, where employees can increasingly live and work in different places because of internet connectivity.

Q22: Do you see a training need for computer skills in your business?

ANSWER CHOICES	RESPONSES	
Yes	39.13%	18
No	60.87%	28
TOTAL		46

There are a series of questions about how your employees learn best, do you offer training now, and how would you rate the skill level around computers. These would be clues to how a Digital Literacy program might reach businesses in the region.

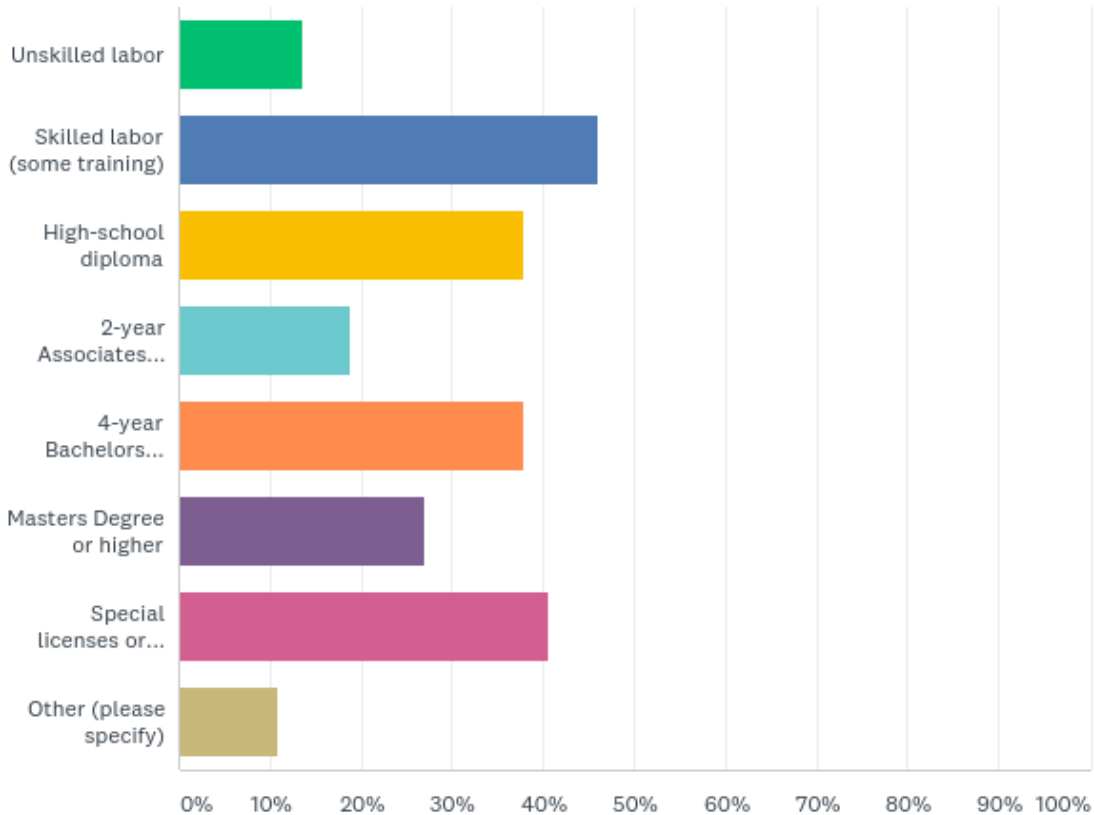
Q29: What classes would be of interest to your staff?



Q30: Number of employees?

ANSWER CHOICES	RESPONSES	
Self, it's only me!	29.55%	13
2-5	47.73%	21
5-10	11.36%	5
10-25	2.27%	1
Over 25	9.09%	4
TOTAL		44

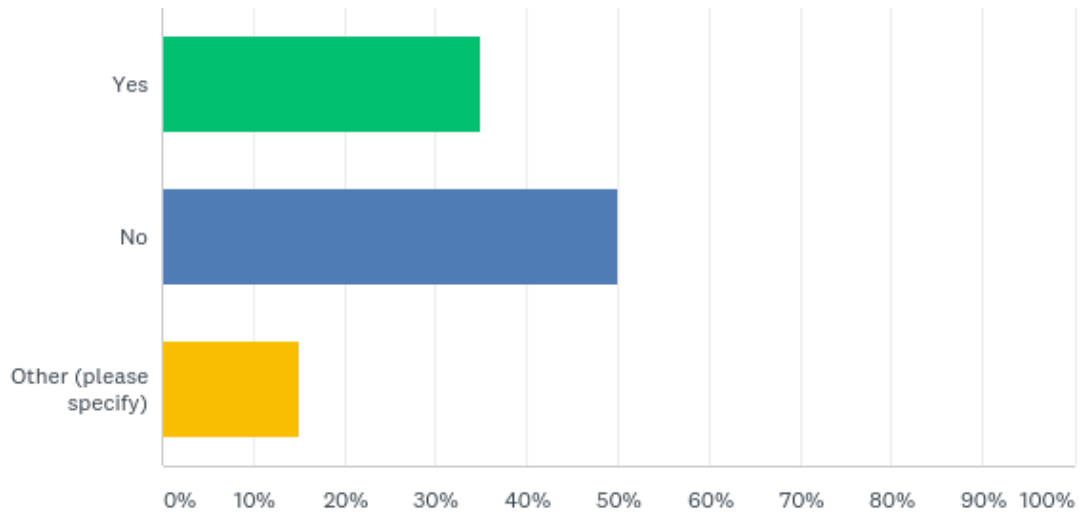
Q32: Skill levels required in your business?



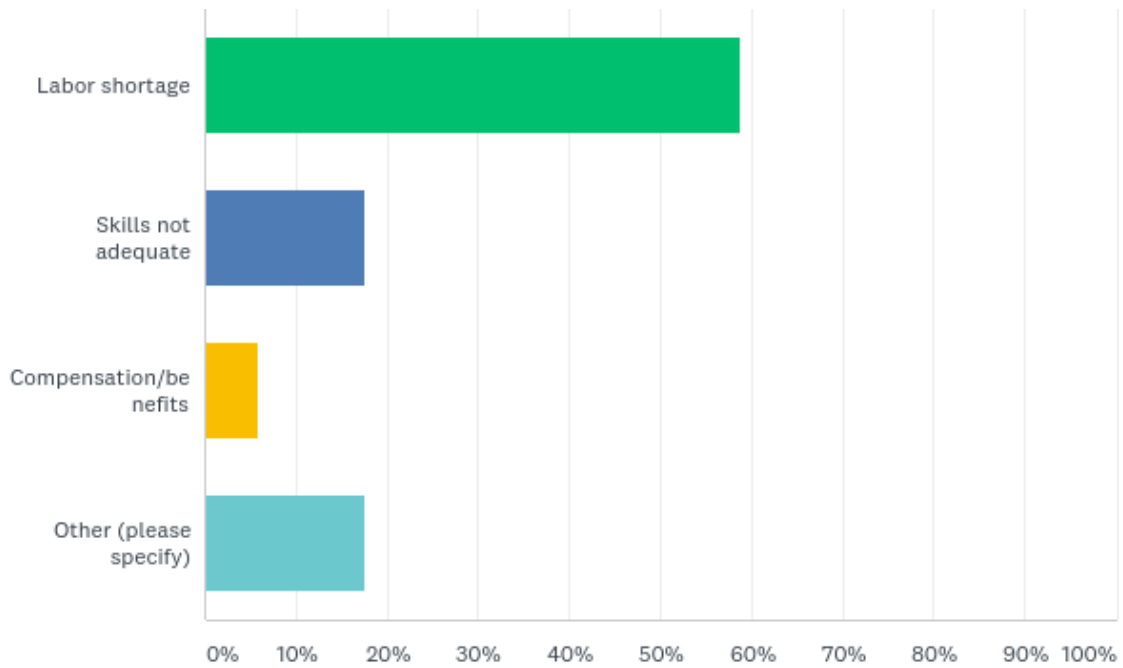
Q33: Do you expect training will be needed for your new and existing employees over the next year?

ANSWER CHOICES	RESPONSES	
Yes	47.50%	19
No	32.50%	13
Not Sure	20.00%	8
TOTAL		40

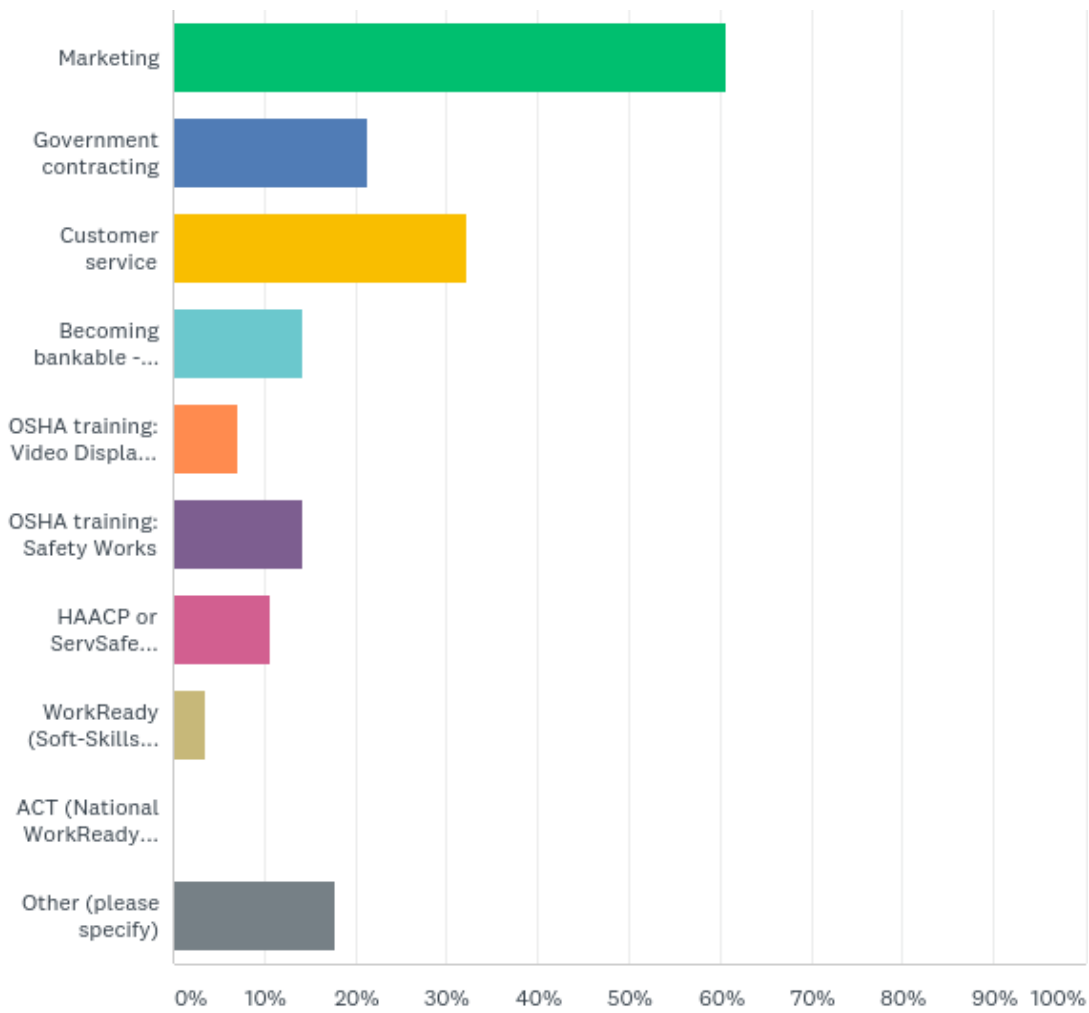
Q34: Do you have difficulty recruiting new employees?



Q35: If so, what are the factors?



Q36: What workshops would be beneficial?



ANSWER CHOICES	RESPONSES	
Marketing	60.71%	17
Government contracting	21.43%	6
Customer service	32.14%	9
Becoming bankable - basic recordkeeping	14.29%	4
OSHA training: Video Display Terminals	7.14%	2
OSHA training: Safety Works	14.29%	4
HAACP or ServSafe training	10.71%	3
WorkReady (Soft-Skills) (Maine Certification)	3.57%	1
ACT (National WorkReady Certification)	0.00%	0
Other (please specify)	17.86%	5
Total Respondents: 28		

A Few Comments:

We need support with basic computer skills and IT Security training for employees and others in the labor force that may work for us in the future. - Moinlycke in Wiscasset

We need Westport Wired!!! Satellite internet is terrible. - Northeast Photographic, Westport Island

I get all the training I need through my company- Westport Island resident telecommuting for TERC (based in Cambridge, MA)

High speed is available already. What are you up to? This is not a government job!- ECHO Inc. Wiscasset

We have fiber, which is fine. - Cod Cove Inn, Edgecomb

Businesses who left their contact info:

Cod Cove Inn, Edgecomb
William Joyce, Edgecomb
Mid-Maine Millwork, Edgecomb
Jefferson Fire and Rescue, Jefferson
NC Hunt, Inc., Jefferson
Henry McInnis, Creditscore.com, Somerville
Reishus Consulting, LLC, Somerville
Karl Olson and Associates, Wiscasset
AK Energy Consultants, Somerville
Dresden Consulting Group, Dresden
Snowsquall Inn, Wiscasset
South Somerville Baptist Church, Somerville
ECHO Inc., Wiscasset
Briggs Farm, Somerville
California Contract Company, California- Russel Gates, Somerville
RN Heinlein Consulting, LLC, Jefferson
Deborah Myers- Self employed
Chesterfield Associates, Westport Island
Flutter Focus Photography, Westport Island
Sasanoa Brewing Company, Westport Island
Glidden Point Oyster, Edgecomb
Scully's Oyster & Lobster Market, Edgecomb
Violet Vaughn/Sugarloaf Publishing, Westport Island
Donna Curry, TERC (Cambridge,MA), Westport Island
Sweeney Ridge Studios, Edgecomb
Central Maine Pyrotechnics, Farmingdale
RJ Associates, LLC, Westport Island
Orff Realty, Jefferson
The Blueberry Moose, Westport Island
Northeast Photographic, Westport Island
Dan's Auto, Somerville
Plante's Lobster Vents, Somerville
James Kochan Fine Arts & Antiques, Wiscasset

Business Survey Takeaways

- Business focused training should be strongly considered
 - The businesses that responded were generally open to training, and welcomed it
- Almost half of respondents say that the internet is not keeping up with their needs
- There are limited fiber assets available in some locations
- Spectrum- Costly and drops at high use times of day
- Consolidated- Frustratingly unreliable and suffer from slow speeds
- Satellite, wireless- Responders would choose other service if it was available



Memo

To: Whitefield BB Committee/Lincoln County
Fr: Mark Ouellette, Axiom
Date: January 29, 2019

Re: Residential survey Analysis

Overview:

The Whitefield BB Committee has done a fantastic job of collecting 269 surveys in the community. The majority (over 70%) from Spectrum customers, and a far second from Consolidated customers (16%). We did not have access to the “Other” category, but assume these would be homes using satellite or Wi-Fi hotspots. Typically, Spectrum would serve the more densely populated core of the community, while Consolidated would serve the whole community, including the more sparsely populated outer edges, typically with increasingly poor service the further the home from the equipment.

Analysis:

A number of questions were asked, but it remains unclear if citizens are dissatisfied with their service. That question was not asked. Given the responses, we assume that there is some level of dissatisfaction as people are typically more motivated to respond to a questionnaire if they are upset. That said, this is also an assumption on my part having done survey work of this type across Maine in many communities.

When asked what they used the internet for, it was revealing to understand that Business and Education were just under 50%, but Medical also drew 61 responses (22.68%) and Telecommuters also drew 61 responses (22.68%). This is important to help the select board and potential funders know how critical the need is that good connectivity be available, given their needs.

Last, not surprisingly, when asked what good internet would mean for the community, answers were pretty standard. Support Small business leading the pack with over 54% of respondents. Distant Learning coming in a close second, at 49%.

Next Steps:

Because of the two providers in the community, my instinct tells me that the Broadband Committee should be working on specific goals they would want to achieve. This will really help us move forward into Phase II. As we consider meetings with the providers, getting a Spectrum coverage map will be critical, as I am assuming... (All this will be clear once we talk) that your plans would be to try to expand Spectrum coverage, or overlay additional coverage over the more poorly served parts of the community that only Consolidated serves. You may have other goals.

- Spectrum mapping important
 - Work with Spectrum through Franchise agreement (if not updated) to price and expand service
- Has Consolidated used CAF funds to enhance service in the community- we can find out
- Unlikely that the new USDA funding would apply to your community
- Maybe ConnectME infrastructure funding, deadline in March-April, requires a 50% match, more match makes you more competitive