Saskatchewan Broadband Action Committee

Saskatchewan Broadband Community Needs and Priorities Survey

Summary Report

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Saskatchewan Broadband Action Committee Community Needs & Priorities Survey

The Saskatchewan Broadband Action Committee developed a survey to examine and analyze broadband access from several perspectives across our province.

In total, **168** community members completed the online survey. These community members include the following:

- Saskatchewan Association of Rural Municipalities
- Saskatchewan Chamber of Commerce
- Federation of Sovereign Indigenous Nations
- Saskatchewan Urban Municipalities Association
- Saskatchewan School Boards Association
- Saskatchewan Indigenous Economic Development Network
- Saskatchewan Economic Development Alliance
- New North
- Saskatchewan Teachers' Federation
- Clarence Campeau Development Fund
- Regional Colleges of Saskatchewan

Research Purpose

The purpose of the survey research is to identify issues, areas for improvements, as well as priorities and opportunities related to broadband infrastructure across Saskatchewan. Responses will help better understand how access to broadband infrastructure is currently impacting organizations and communities in Saskatchewan.

Survey Methodology

The survey was programmed into an online survey platform and pre-tested to ensure questions flowed efficiently and incorporated correct branching and skip patterns.

Introduction
Saskatchewan Broadband Action Committee

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Saskatchewan Broadband Action Committee

Saskatchewan Broadband Action Committee

The Saskatchewan Broadband Action Committee developed a community needs and priorities survey to better examine and analyze broadband access from several perspectives across our province. This survey helps our committee better understand how access to broadband infrastructure is currently impacting organizations and communities in Saskatchewan.

Snapshot of Respondents

- Majority (88%) of survey said they represent a Municipality.
- First Nations represent 8% of survey respondents.
- 7% of survey respondents said they represent an Education Organization.

Broadband Access to 50/10 High Speed Internet

- 53% of respondents indicated they DO NOT have access to broadband 50/10 high-speed internet or better.
- 47% of survey respondents indicated they DO have access to broadband high-speed internet.

Broadband Internet Use & Services

- 48% of survey respondents who are able to access high-speed internet indicated mobile internet is a current broadband infrastructure that is available to them.
- 92% of respondents who are able to access high-speed internet said Sasktel is a current internet service provider available.
- 38% of respondents who are able to access high-speed internet said they are dissatisfied when their service provider.

Community Broadband Planning

- 45% of survey respondents who do not have access to high-speed internet said a broadband plan is a priority for their community.
- 98% of respondents who do not have access to high-speed internet said they do not have a formal broadband connectivity plan in place.
- 58% of respondents who do not have access to high-speed internet said reliability of internet service is most important when it comes to broadband connectivity.

Improved Broadband Connectivity

- Student learning and distant education is most important to majority (72%) of survey respondents when it comes to improved broadband connectivity.

- When it comes to better broadband connectivity, 66% of respondents said home-based and remote-working employment opportunities is very important.

Snapshot of Survey Respondents

Q. Please select the type of community or organization you represent:

- Majority **(88%)** of survey respondents said they represent a Municipality;

- **7%** of those who responded indicated they represent an Education Organization; and

- First Nations represent **8%** of survey respondents.

Please select the type of community or organization you represent.

Category	Percentage
Municipality	88%
Education Organization	7%
First Nation	8%
Other	1%
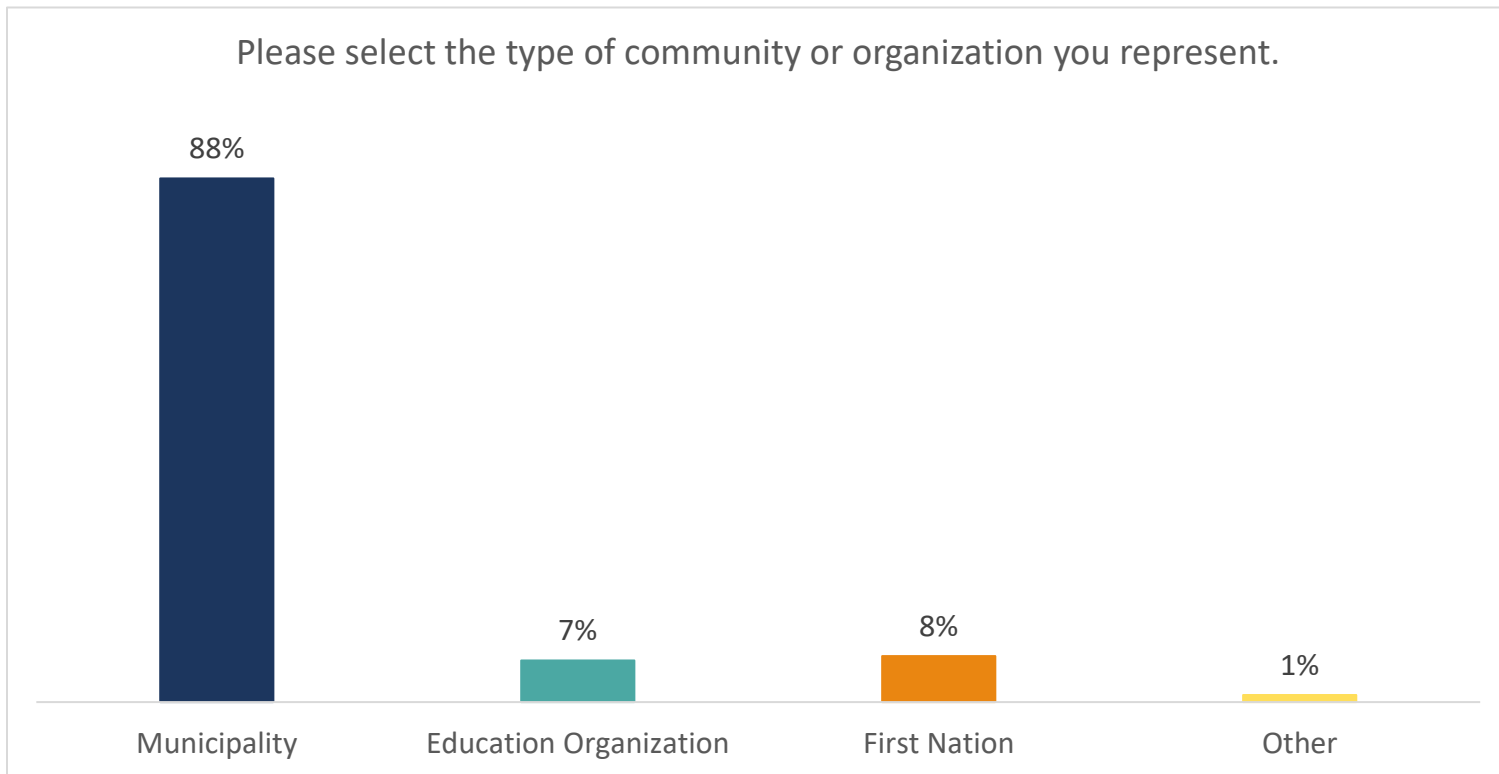
Municipality Survey Respondents

Q. What best describes the type of municipality you represent?

- Majority **(58%)** of Municipality survey respondents said they represent a Rural Municipality;

- **15%** of Municipality survey respondents said they represent a Town;

- **13%** of Municipality survey respondents said they represent a Village;

- **1%** of Municipality survey respondents said they represent a Northern Municipality and a Resort Village.

% of overall sample shown

Rural Municipality	Town	Village	Northern Municipality	Resort Village
58%	15%	13%	1%	1%
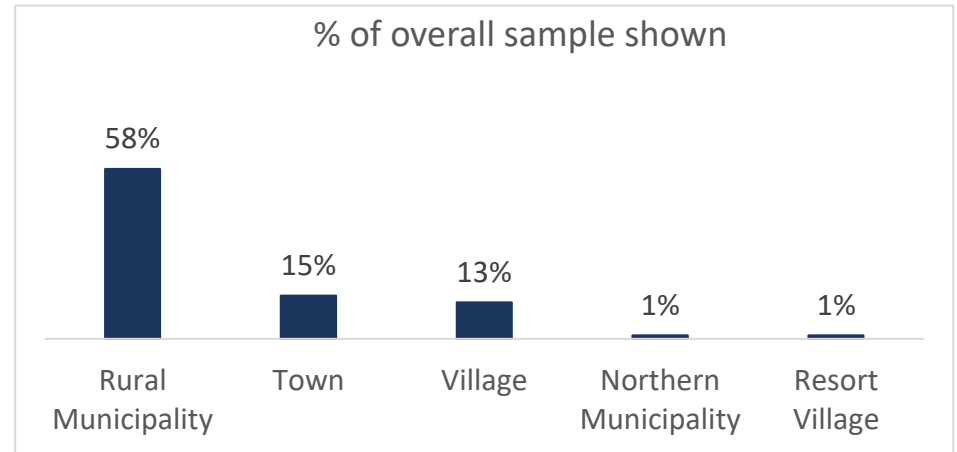
Q. Which best describes your position?

- **63%** of survey respondents said their position within the Municipality is an Administrator;

- **7%** of survey respondents said their position within the Municipality is an Assistant Administrator;

- **2%** of survey respondents said their position within the Municipality is a Reeve; and

- **1%** of survey respondents said their position within the Municipality is a Clerk, Senior IT Official, and a Director of Operations.

% of overall sample shown

Position	%
Administrator	63%
Assistant Administrator	7%
Reeve	2%
Clerk	1%
Senior IT Official	1%
Director of Operations	1%
Other	12%
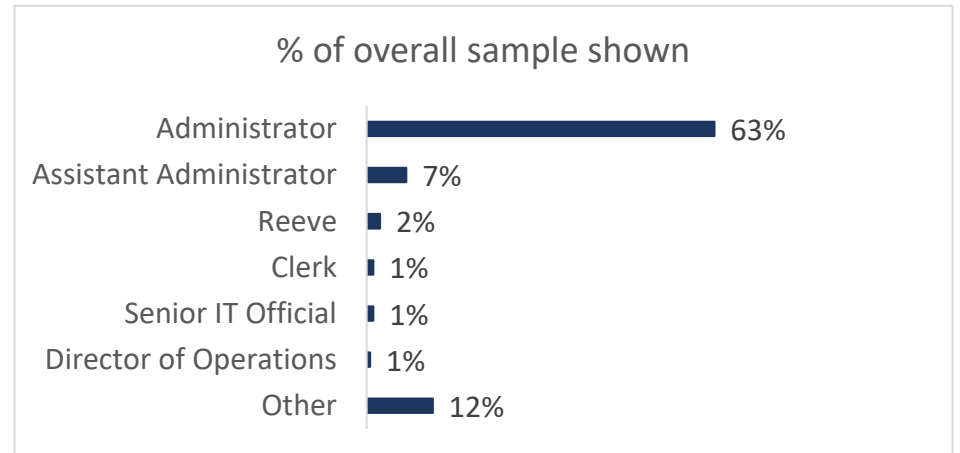
Education Organization Survey Respondents

Q. Which best describes your organization?

- **5%** of Education Organization survey respondents said they represent the School Board; and

- **2%** of Education Organization survey respondents said they represent Regional Colleges.

% of overall sample shown

5%	2%
School Board	Regional College
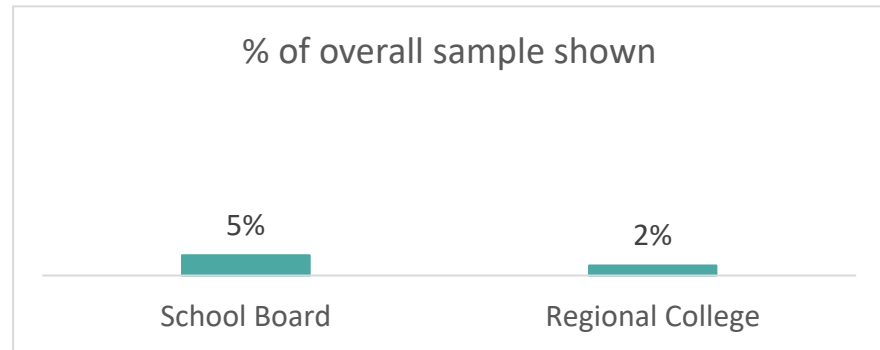
Q. Which best describes your position?

- **5%** of survey respondents said their position within the Education Organization is Senior IT Official;

- **2%** of survey respondents said their position within the Education Organization is Senior Leadership /Management; and

- **1%** of survey respondents said their position within the Education Organization is Administration.

% of overall sample shown

5%	2%	1%
Senior IT Official	Senior Leadership / Management	Administrator
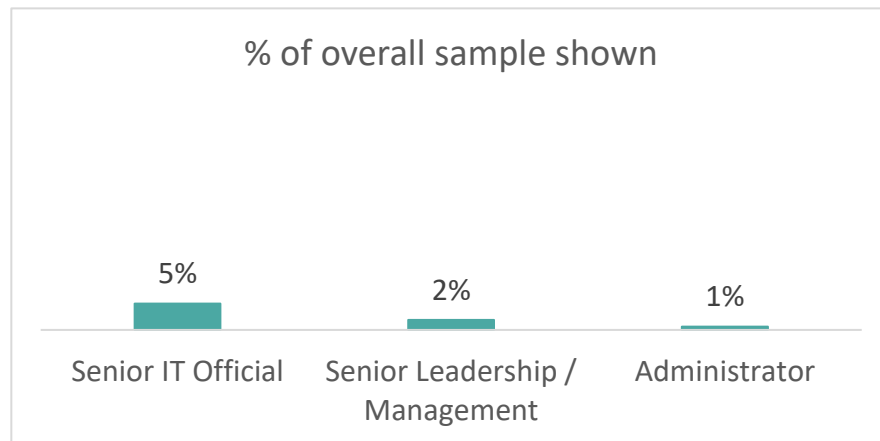
First Nation Survey Respondents

Q. Which best describes your position?

- **2%** of survey respondents said their position within the First Nation is the Band Manager; and

- **1%** of survey respondents said their position within the First Nation is a Councillor.

% of overall sample shown

Councillor	Band Manager	Other
1%	2%	1%
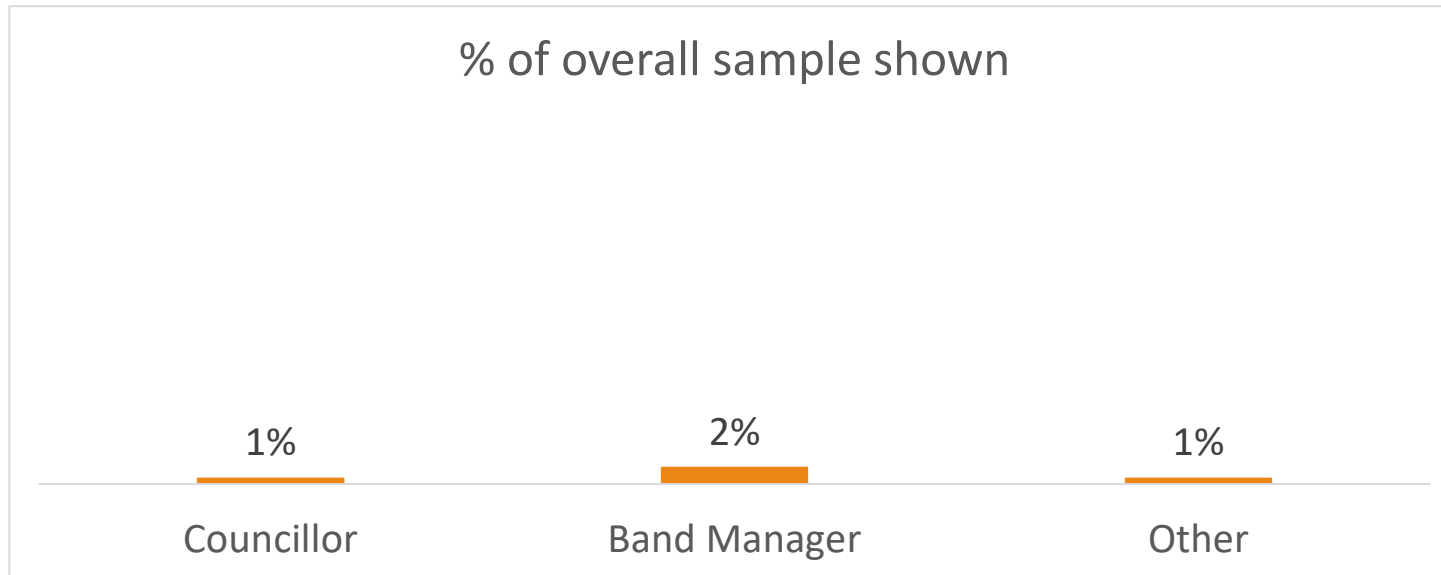
Survey Results

SECTION ONE: Broadband Internet Use & Services

Q. Is your Municipality/Education Organization/First Nation currently able to access broadband 50/10 high-speed internet or better?

- **47%** of survey respondents indicated they DO have access to broadband 50/10 high-speed internet or better.

53% (No)

47% (Yes)

Yes   No
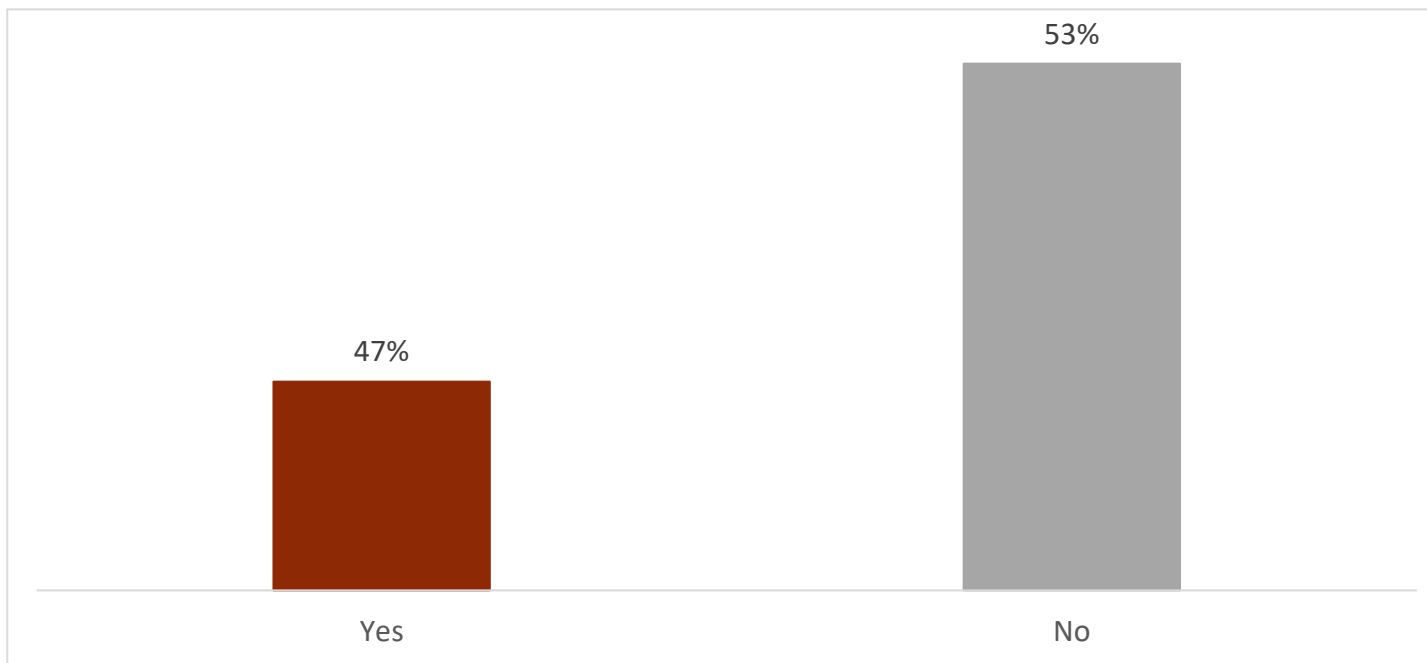
*Note: This section was only asked to those currently able to access broadband 50/10 high-speed Internet or better.

Broadband Internet Infrastructure

Q. Which broadband internet infrastructures are currently available for your Municipality/Education Organization/First Nation to choose from? Please select all that apply.

- **48%** of survey respondents who are able to access high speed internet indicated mobile internet is a current broadband infrastructure that is available to them;

- Fibre Optic is currently avalibale to **45%** of those able to access high speed internet; and

- Satellite is a current broadband infrastucture that is availiable to **44%** of survey respondents who completed this section.

Category	Percentage
Mobile Internet	48%
Fibre Optic	45%
Satellite	44%
Cable	42%
Traditional telephone lines	34%
Fixed Wireless Internet	33%
Dial up	5%
Other	5%
Not sure	6%

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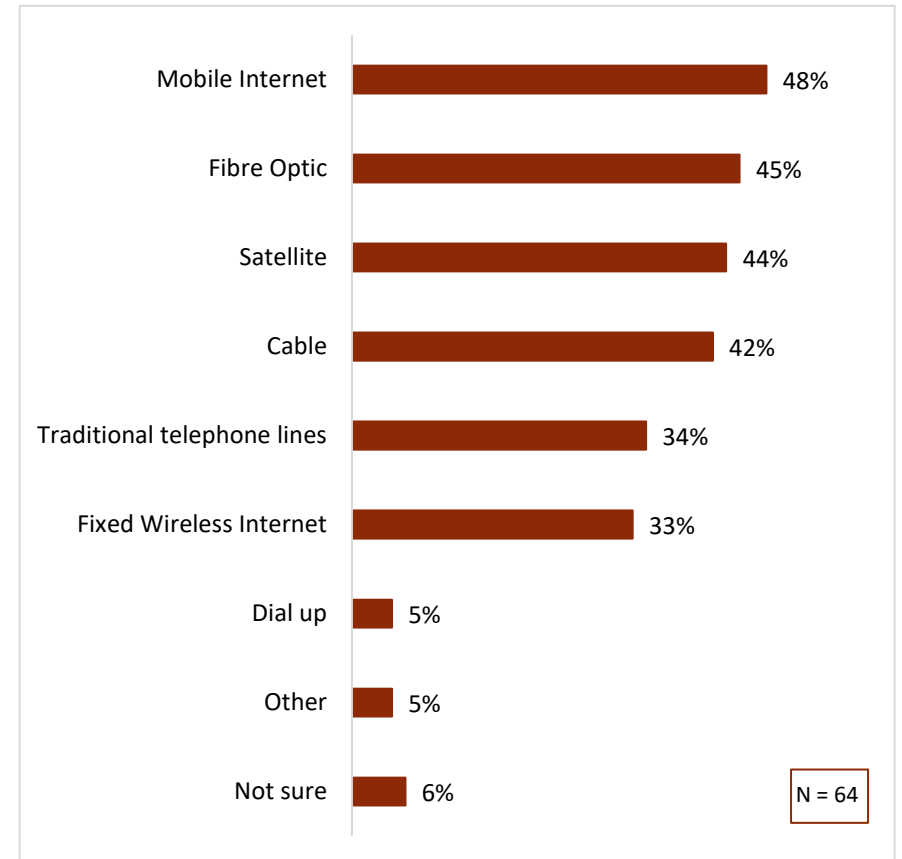
Broadband Internet Service Provider

Q. Which broadband Internet Service Provider (ISP) companies are currently available to your Municipality/Education Organization/First Nation? Please select all that apply.

- Majority **(92%)** of survey respondents who are able to access high speed internet said SaskTel is a current internet service provider available;

- Xplornet is a current internet service provider that is avalibale to **53%** of those able to access high speed internet; and

- Access Communication is current internet service provider that is avalibale to **50%** of survey respondants who completed this section.

Provider	Percentage
SaskTel	92%
Xplornet	53%
Access Communications	50%
Shaw Communications	17%
Other	19%
Unsure	3%

N = 64
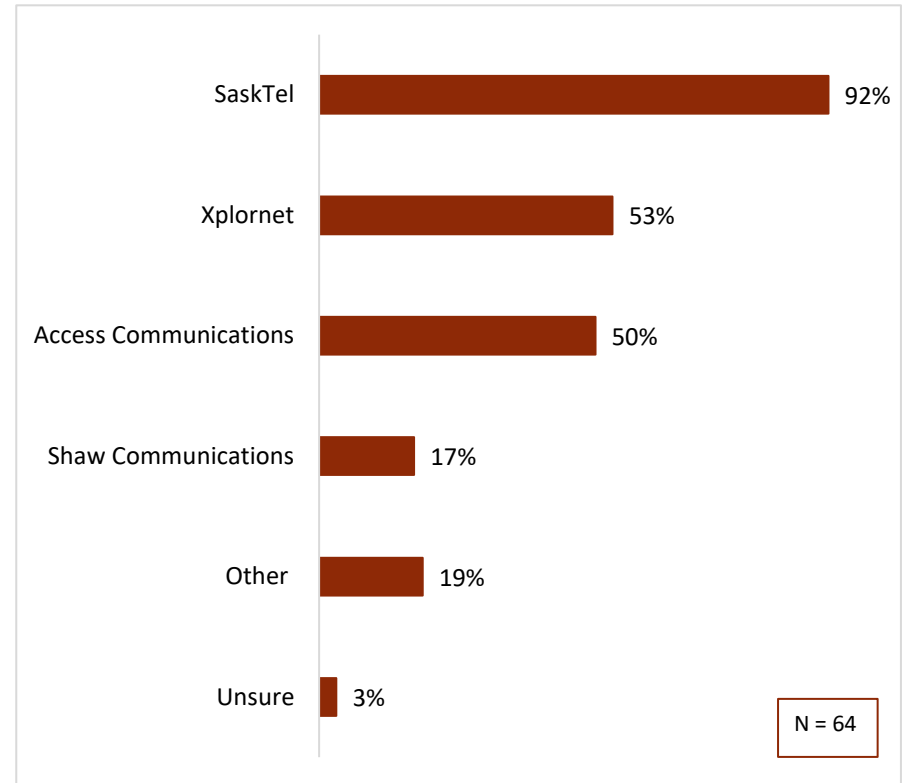
Current Internet Service Provider

Q. Which Internet Service Provider (ISP) did your Municipality/Education Organization/First Nation select for your broadband service?

- **84%** of survey respondents who are able to access high speed internet indicated SaskTel is a current internet service provider their Municipality/Education Organization/First Nation has selected for their broadband service;

- **8%** of survey respondents who are able to access high speed internet said "other" when stating which internet service provider their Municipality/Education Organization/First Nation has selected for their broadband service. "Other" includes the following:
    - Mitronics;
    - Redbird;
    - FlexNet;
    - CommunityNet;
    - SRNet;
    - Shaw; and
    - SwiftNet.

N = 64

SaskTel	Xplornet	Access Communications	Other	Unsure
84%	3%	2%	8%	3%
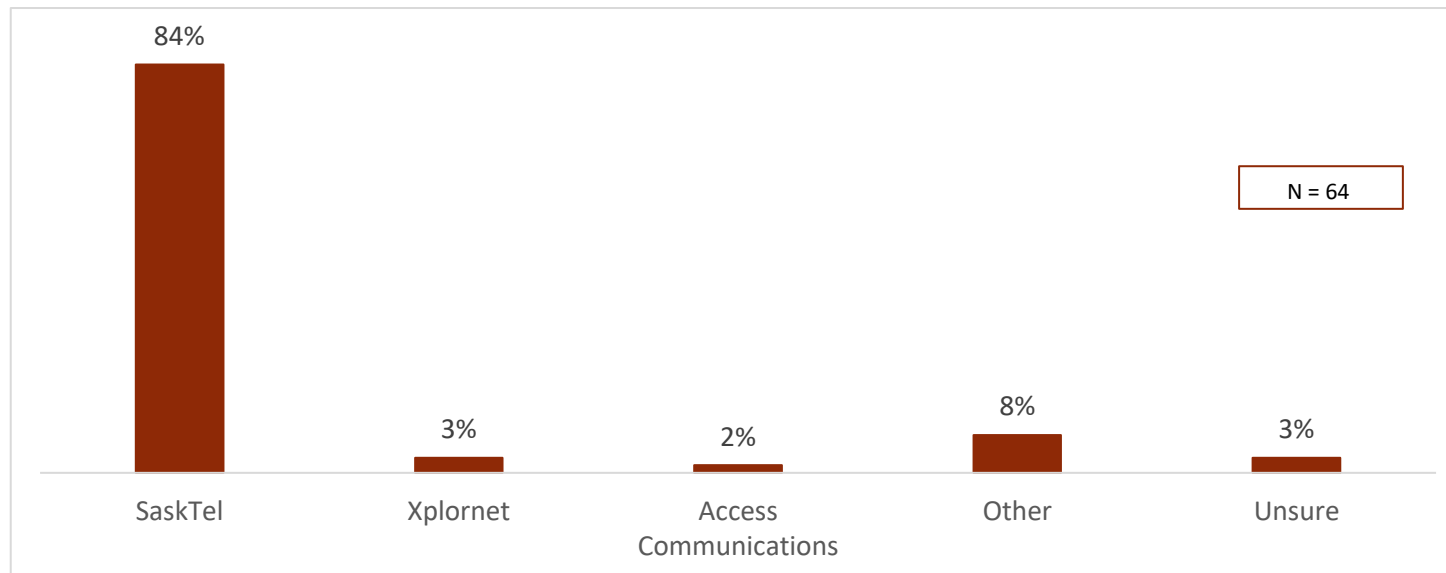
Years with Internet Service Provider

Q. How long has your Municipality/Education Organization/First Nation been with your current Internet service provider(s)?

- Majority **(63%)** of survey respondents who are able to access high speed internet said they have been with their current internet service provider for more then 10 years;

- **16%** of survey respondants who are able to access high speed internet indicated 6 - 10 years with their current internet service; and

- **14%** of survey respondants who are able to access high speed internet said they have been with their current internet service provider for 1 - 5 years.

N = 64

Less than 1 year	1 - 5 years	6 - 10 years	More than 10 years	Unsure
2%	14%	16%	63%	6%
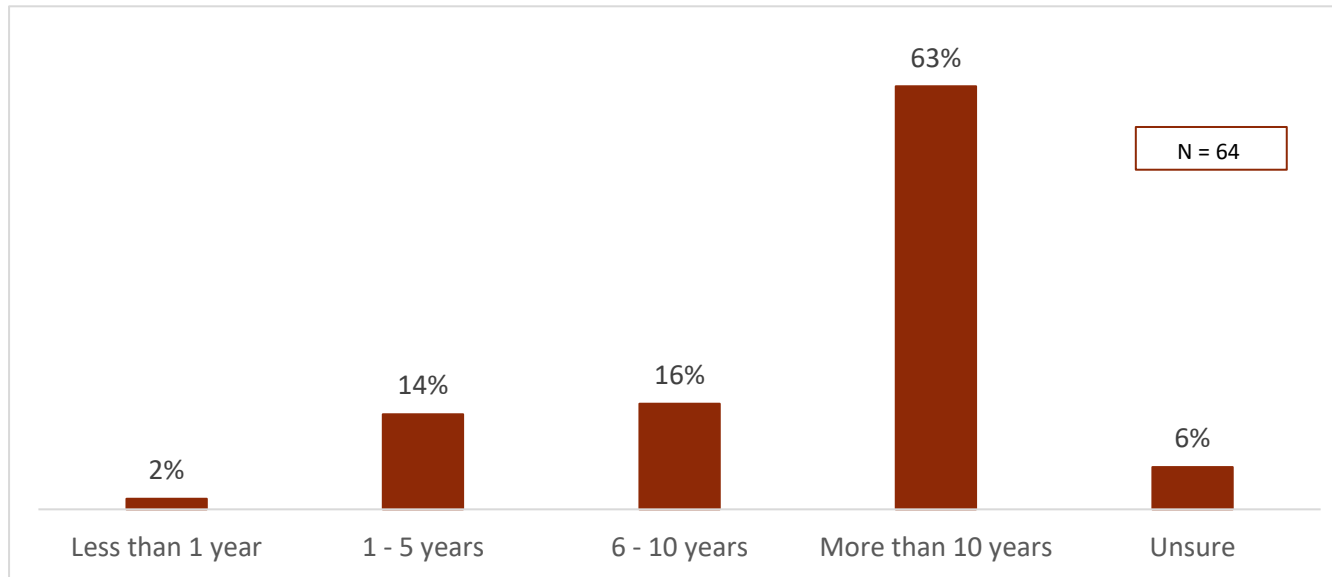
Satisfaction with the Reliability of Available Internet Service

Q. Considering your own experience as well as feedback from others, how satisfied is your Municipality/Education Organization/First Nation with the reliability of available internet service in your community?

- **28%** of survey respondents who are able to access high speed internet said they are very satisfied with the reliability of available internet service in their community;

- **33%** of survey respondents who are able to access high speed internet also indicated that they are somewhat satisfied with the reliability of available internet service in their community; and

- **38%** of survey respondents who are able to access high speed internet said they are dissatisfied with the availaibility of internet service in the community.
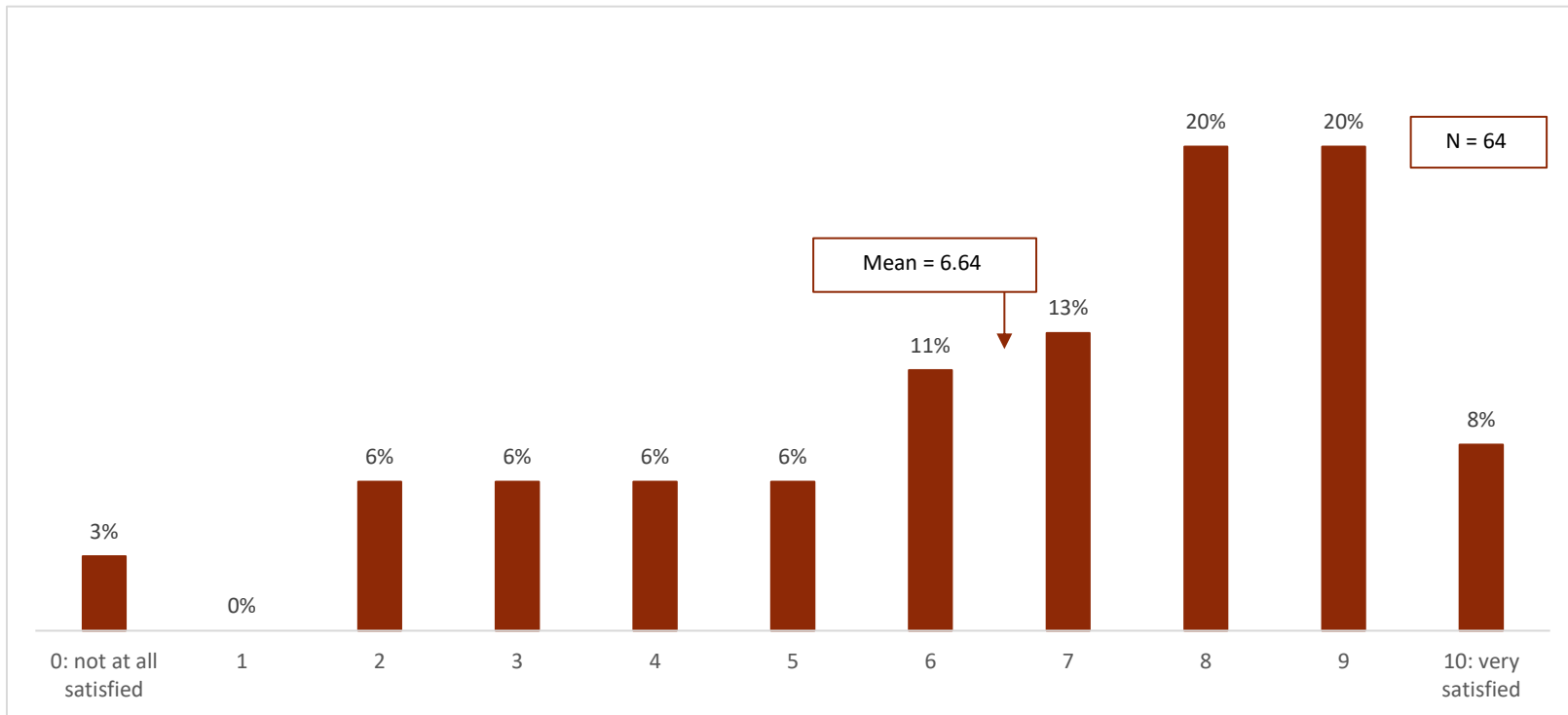
Speed from your Internet Provider

Q. Again, considering your own experience as well as feedback from others, how satisfied is your Municipality/Education Organization/First Nation with consistently getting the advertised speeds from your Internet provider?

- **21%** of survey respondents who are able to access high speed internet said they are very satisfied with the advertised speed from their internet provider;

- **30%** of survey respondents who are able to access high speed internet said they are somewhat satisfied with their internet providers advertised speed; and

- **51%** of survey respondents who are able to access high speed internet said they are dissatisfied with the advertised speed from their internet provider.
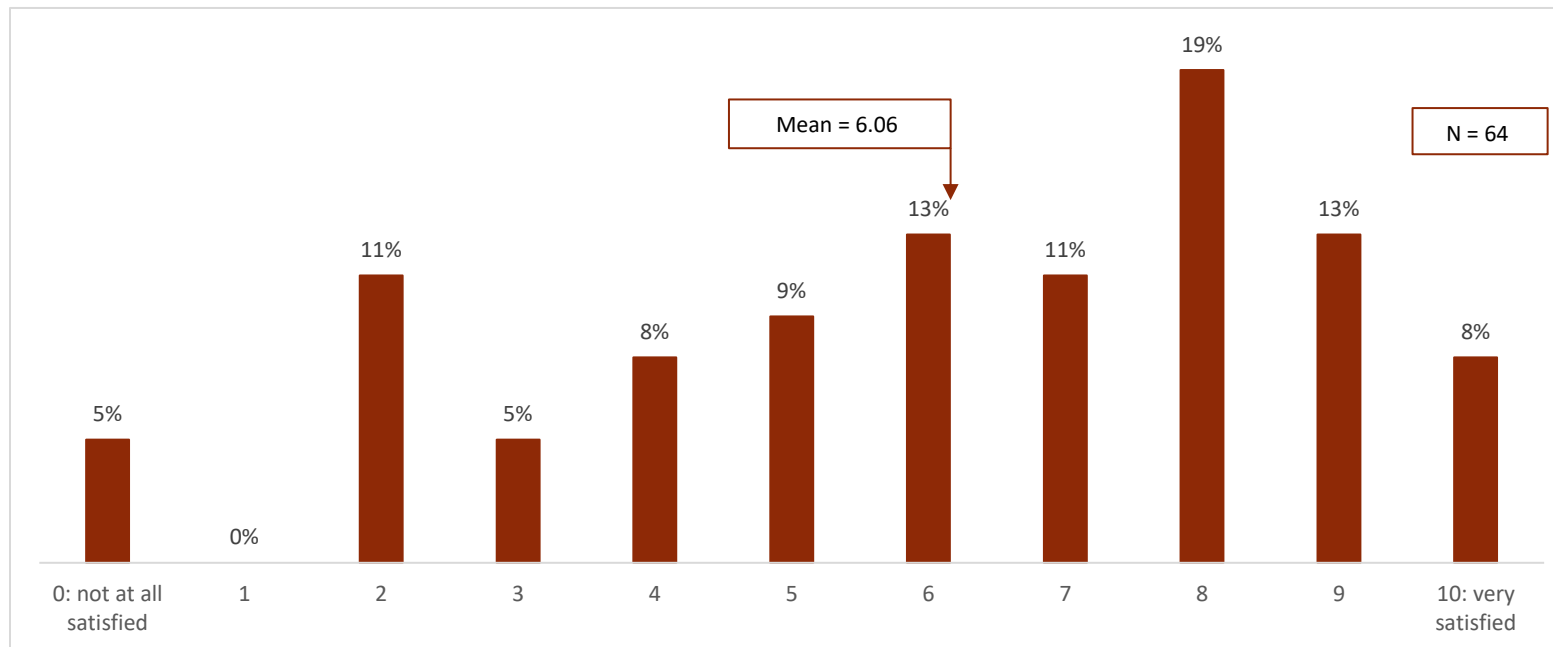
Satisfaction with Internet Provider

Q. Considering feedback from your Municipality/Education Organization/First Nation, how satisfied are you with your current internet service provider in terms of the following...?

- **60%** of survey respondents who are able to access high speed internet said they are "very satisfied" with **data allowance** from their current service provider**;**

- **61%** of respondents who are able to access high speed internet said their current service provider's **reliability of internet service** is "somewhat satisfactory"; and

- The **technical support** from their current service provider is "somewhat satisfactory" to **59%** of respondents who are able to access high speed internet.

* NOTE: On average, **data allowance** & **technical support when we have problems** both received a mean rating of 3.65 on the 5-point scale.

Category	1. Very dissatisfied	2. Somewhat dissatisfied	3. Neutral	4. Somewhat satisfied	5. Very satisfied
Data allowance (Mean = 3.65)	11%	8%	21%	25%	35%
Technical support when we have problems (Mean = 3.56)	2%	14%	25%	45%	14%
Reliability of Internet service (Mean = 3.50)	6%	23%	9%	36%	25%
Speed of downloads and uploads (Mean = 3.28)	14%	20%	11%	33%	22%
Cost / Affordability (Mean = 3.02)	8%	23%	33%	31%	5%
Value for money (Mean = 2.97)	9%	22%	38%	25%	6%

N = 64

Importance of Factors from Internet Service Provider

Q. Please rank the importance of these same factors, from most important to your Municipality/Education Organization/First Nation, to next most important, and so on.

- **62%** of survey respondents who are able to access high speed internet said the **reliability of internet service** from their current service provider is most important;

- The **speed of downloads and uploads** from their current service provider is most important to **25%** of respondents who are able to access high speed internet; and

- The **data allowance mean** from their current service provider was ranked least important to **44%** of survey respondants who completed this section.

* NOTE: On average, **reliability of internet service** receives a mean rating of 1.80 on the 6-point scale which indicates higher overall importance.

Factor	1	2	3	4	5	6
Reliability of Internet service (Mean = 1.80)	62%	16%	8%	7%	5%	2%
Speed of downloads and uploads (Mean = 2.33)	25%	43%	18%	8%	3%	3%
Cost / Affordability (Mean = 3.98)	5%	18%	7%	34%	16%	20%
Value for money (Mean = 4. 07)	5%	10%	16%	25%	31%	13%
Technical support when we have problems (Mean = 4.16)	2%	8%	30%	11%	31%	18%
Data allowance Mean = 4.66)	2%	5%	21%	15%	13%	44%

Legend: ■1 ■2 ■3 ■4 ■5 ■6

N = 64
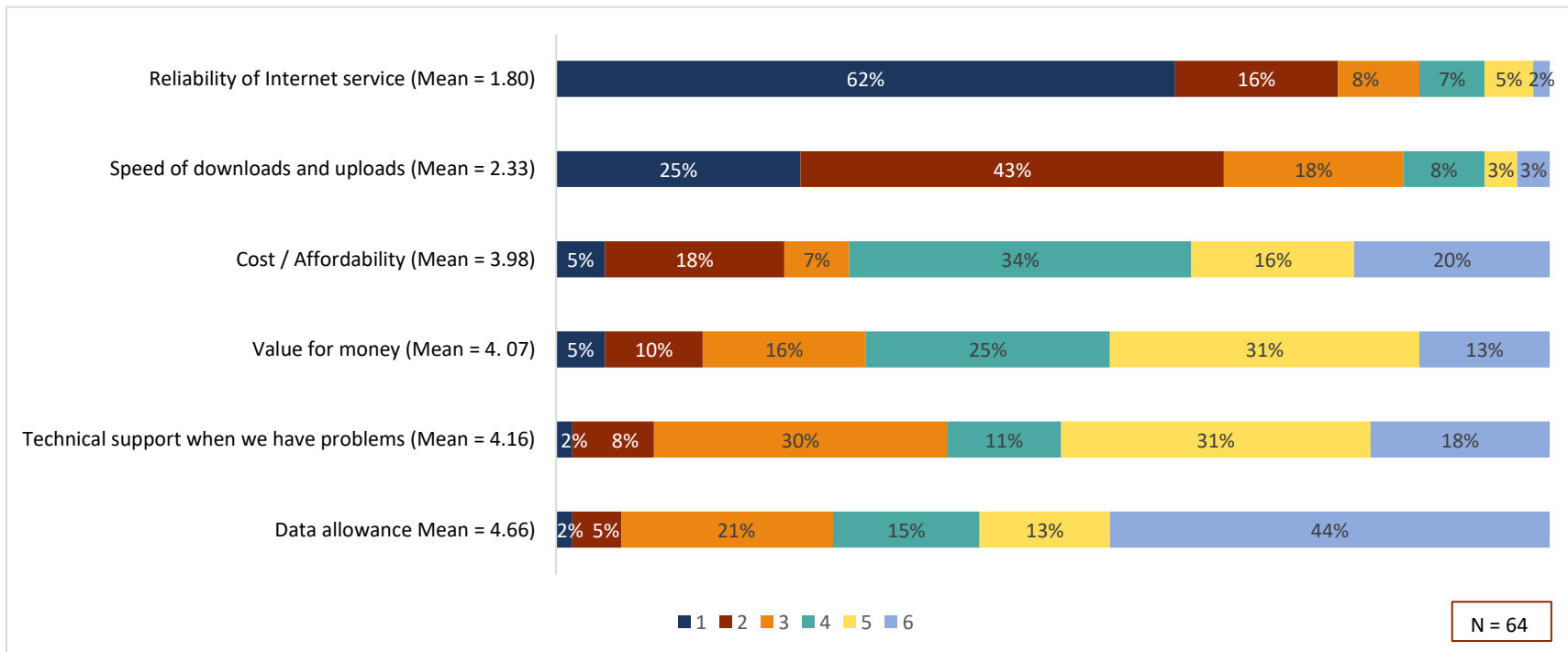
Priority Mapping

Priority Mapping has been used as a means to help interpret results and support decision-making for future action. The analysis directly compares and depicts satisfaction and priority scores for each area tested in the survey.

The mean scores for satisfaction and priority are plotted on the map and the grids are quartered based on the overall mean scores for all areas tested. The Priority Map is interpreted based on which statement lands within each quadrant.

Regression Analysis determined that "reliability of available internet service and satisfaction with consistently receiving the internet speeds advertised by the internet provider" are drivers of satisfaction. These statements are **italicized and highlighted in yellow**.

TOP PRIORITY (red data point) - high priority and lower satisfaction:

➢ Speed of downloads and uploads

SECONDARY PRIORITY (orange data point) - high priority and comparatively higher satisfaction:

➢ Reliability of Internet service

Priority Map
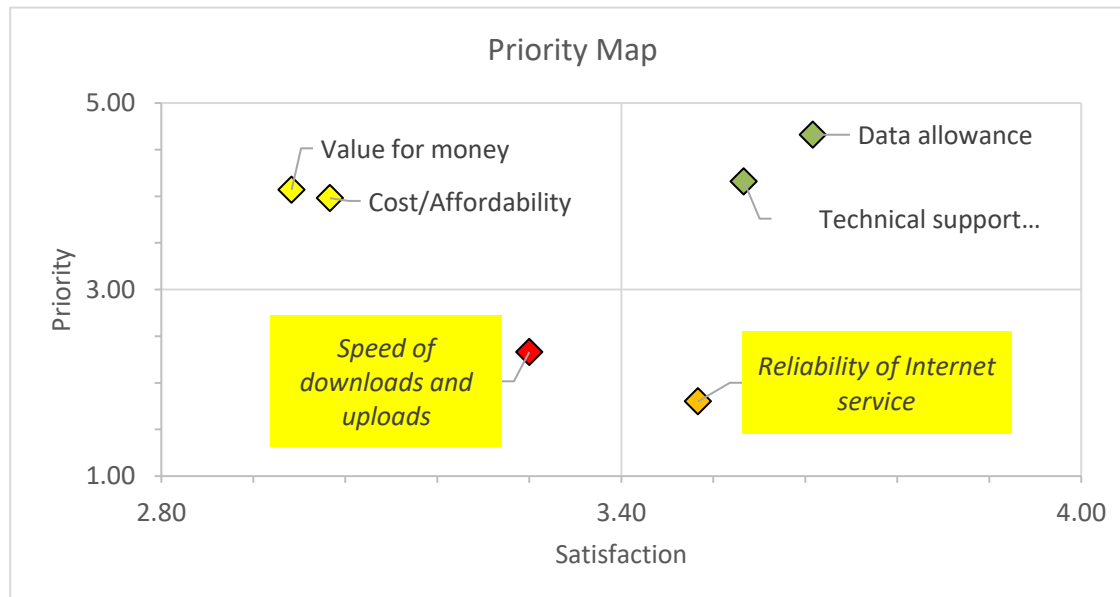
Importance of Service or Infrastructure Improvements

Q. Please rank the importance of service or infrastructure improvements that would be required for your Municipality/Education Organization/First Nation to switch to a new internet provider.

- **35%** of survey respondents who are able to access high speed internet said **faster speed for downloads and uploads** would be a service or infrastructure improvement they would want from a new internet provider;

- **Greater reliability of internet service** would be a service or infrastructure improvement that **26%** of survey respondents who have to access high speed internet would want to see from a new internet provider; and

- **Better pricing** is a service or infrastructure improvement that **21%** of survey respondents who completed this section would like to see from a new internet provider.

	1	2	3	4	5
Faster speeds for downloads and uploads (Mean = 2.24)	35%	31%	15%	13%	6%
Greater reliability of Internet service (Mean = 2.31)	26%	35%	24%	11%	3%
Better pricing (Mean = 3.10)	21%	10%	24%	29%	16%
Availability of new Internet technology (Mean = 3.27)	16%	16%	19%	21%	27%
Data allowance (Mean = 4.08)	2%	8%	18%	26%	47%

Legend: ■1 ■2 ■3 ■4 ■5

N = 64
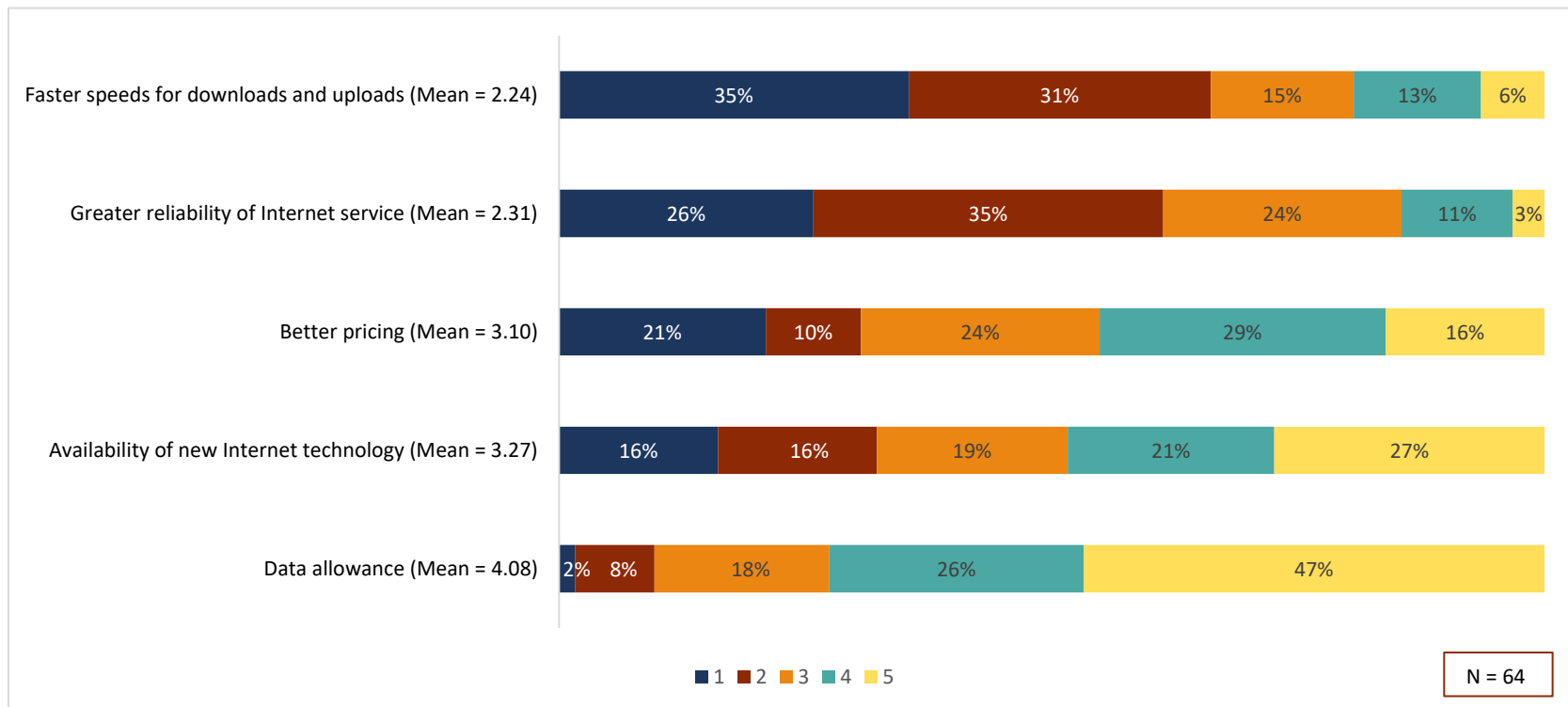
Upgrading your Internet Service Provider

Q. Even if faster and more reliable internet service is available, what do you believe is preventing your Municipality/Education Organization/First Nation from upgrading your Internet service? Please select all that apply.

- **38%** of survey respondents who are able to access high speed internet said infrastructure is stopping them from upgrading their internet service;

- Affordability of internet services is preventing **30%** of survey respondents who have access high speed internet from upgrading their internet service; and

- Ability to pay for added service is preventing **19%** of respondents who have access high speed internet from improving their internet service, according to the report.

Category	Percentage
Infrastructure (i.e., access lines)	38%
Affordability of internet services	30%
Ability to pay for added service	19%
No local technical support	11%
Cost of computer devices	2%
Other	17%
Happy with basic connection	16%
No interest	11%

N = 64
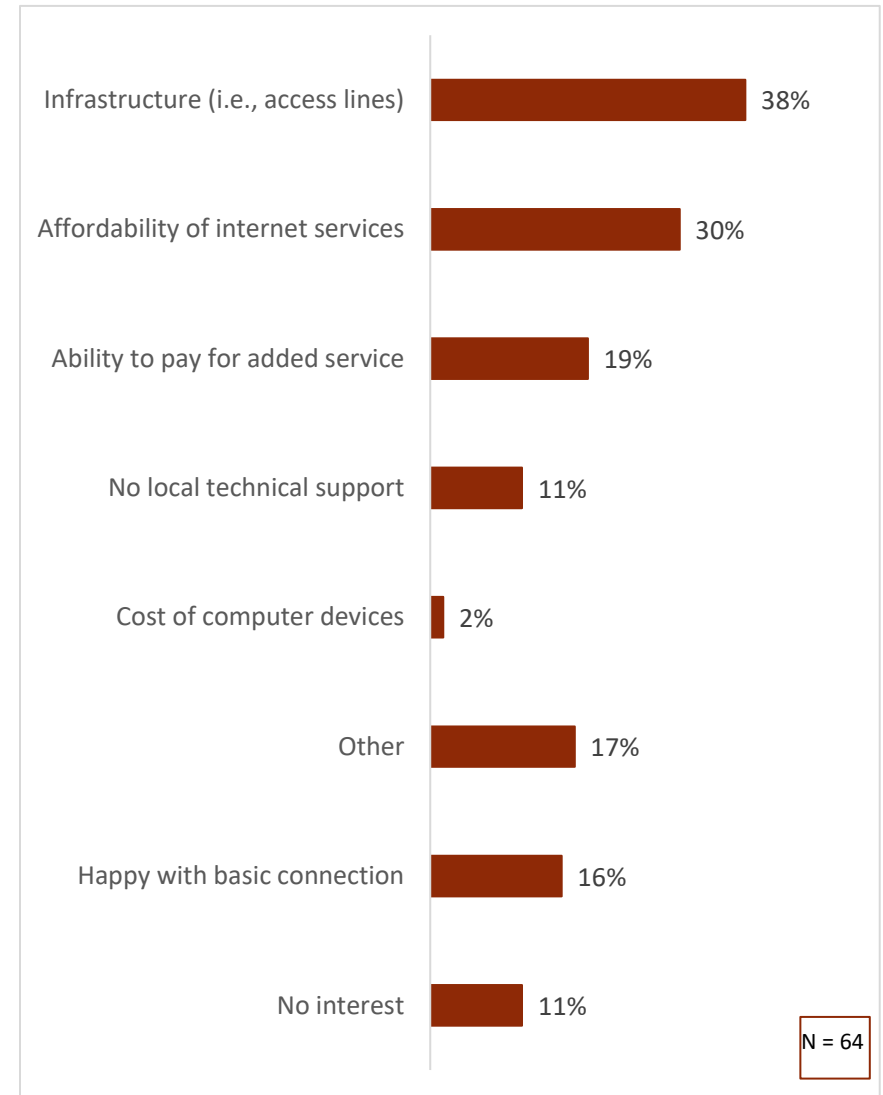
High Speed Internet Restriction

Q. To what extent does the current level of broadband high speed Internet service available in your Municipality/Education Organization/First Nation restrict the way in which organizations/businesses operate or are able to operate?

- **57%** of respondents who are able to access high speed internet said their current broadband high speed internet service **intermittently restricts** their operations;

- **20%** of respondents who are able to access high speed internet said their current broadband high speed internet service **does not restrict** their operations;

- **16%** of respondents who are able to access high speed internet said their current broadband high speed internet service is **somewhat restricts** their operations; and

- **8%** of respondents who are able to access high speed internet claimed their present broadband high speed internet service is **very restrictive** to their operations.

* NOTE: A regression analysis determined that lower satisfaction with existing speed of downloads and uploads drives perceived restrictiveness in terms of how organizations/businesses operate or are able to operate. There were no other drivers.

N = 64

Mean = 5.19

0: does not restrict	1	2	3	4	5	6	7	8	9	10: very restrictive
9%	11%	13%	16%	6%	13%	9%	8%	8%	3%	5%
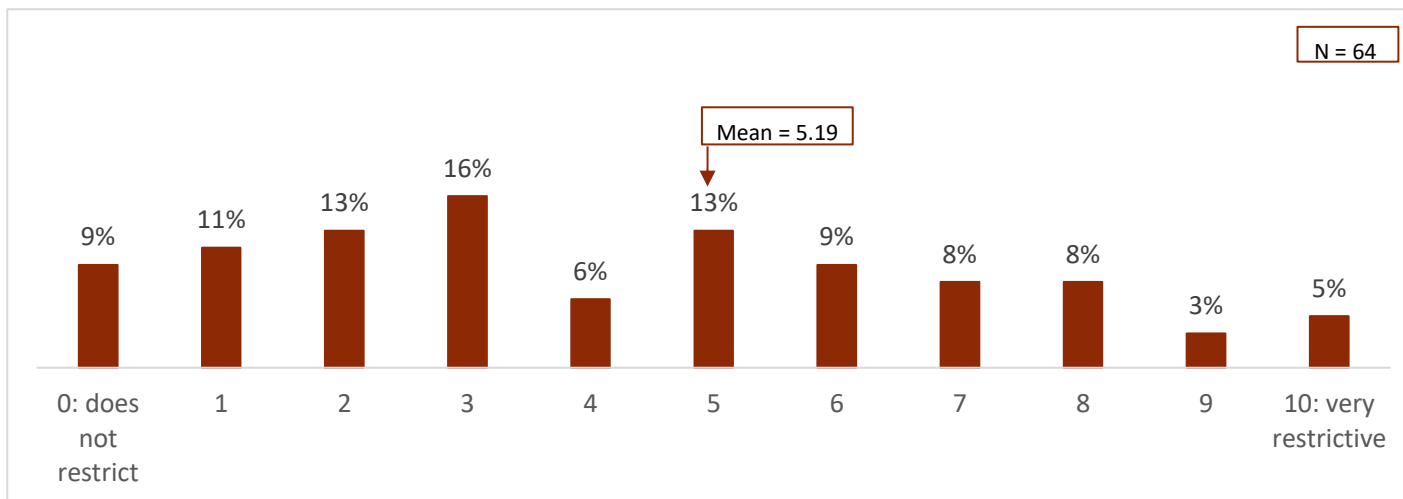
SECTION TWO: Community Broadband Planning

Q. Is your Municipality/Education Organization/First Nation currently able to access broadband 50/10 high-speed internet or better?

- **53%** of survey respondents indicated they DO NOT have access to broadband 50/10 high-speed internet or better.
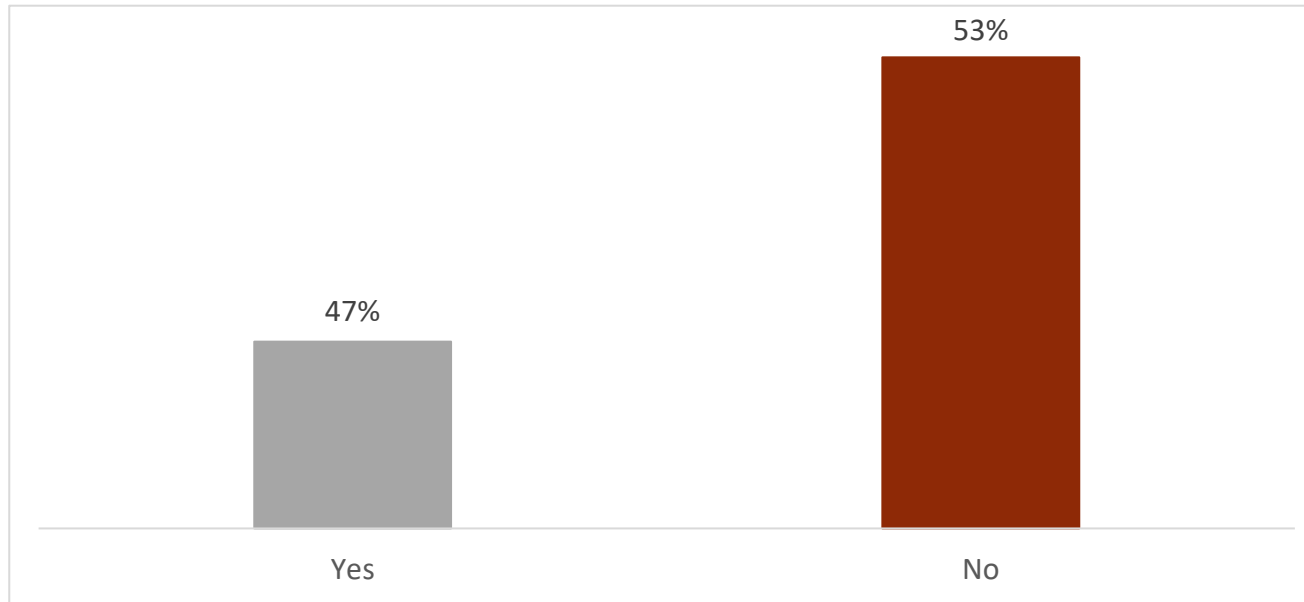
*Note: This section was only asked to those not currently able to access broadband 50/10 high-speed Internet or better.

Impact from the Lack of High Speed Internet

Q. To what extent does the lack of broadband high speed Internet service available to your community impact your Municipality/Education Organization/First Nation?

- **36%** of survey respondents who do not have access to high speed internet said the impact from the lack of high speed internet service available is very high;

- **29%** of survey respondants not able to access high speed internet indicated the lack of high speed internet service avaliable somewhat impact them; and

- **35%** of respondents who do not have access to high speed internet indicated the lack of high-speed internet connectivity had low impact on their Municiaplity/Education Organizations/Fisrt Nation.

N = 71

Mean = 6.86

Rating	Percentage
0: no impact	4%
1	2%
2	3%
3	9%
4	2%
5	6%
6	9%
7	16%
8	13%
9	12%
10: high impact	23%
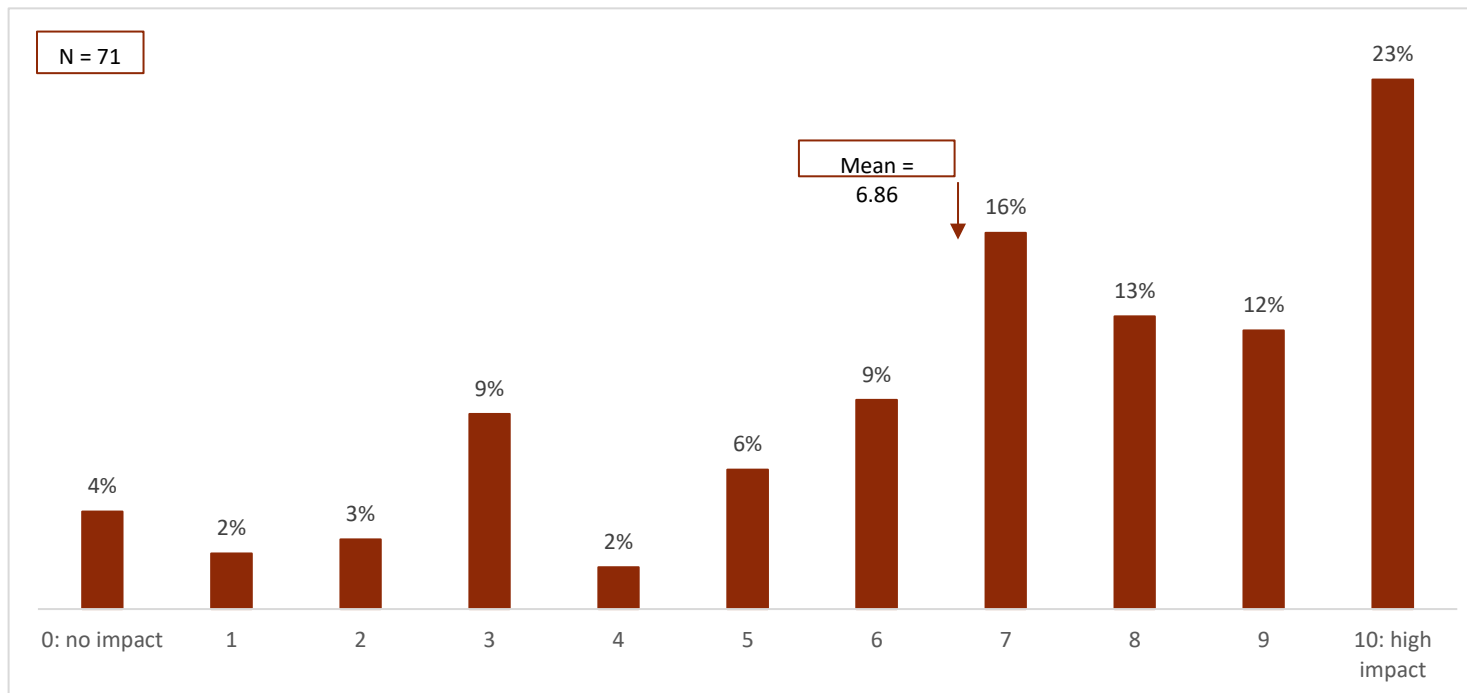
Broadband Plan as a Priority

Q. To what extent do you agree or disagree with the following statement: A broadband plan is a priority for our Municipality/Education Organization/First Nation.

- **45%** of survey respondents who do not have access to high speed internet said a broadband plan is a priority for their community;

- A broadband strategy is somewhat a priority for **27%** of survey respondents not able to access high speed internet in their community ; and

- **15%** of respondents who do not have access high speed internet were undecided about the importance of a broadband plan.

N = 71

Mean = 3.97

45%

27%

15%

6% 7%

| 1. Strongly disagree | 2. Somewhat disagree | 3. Neutral | 4. Somewhat agree | 5. Strongly agree |
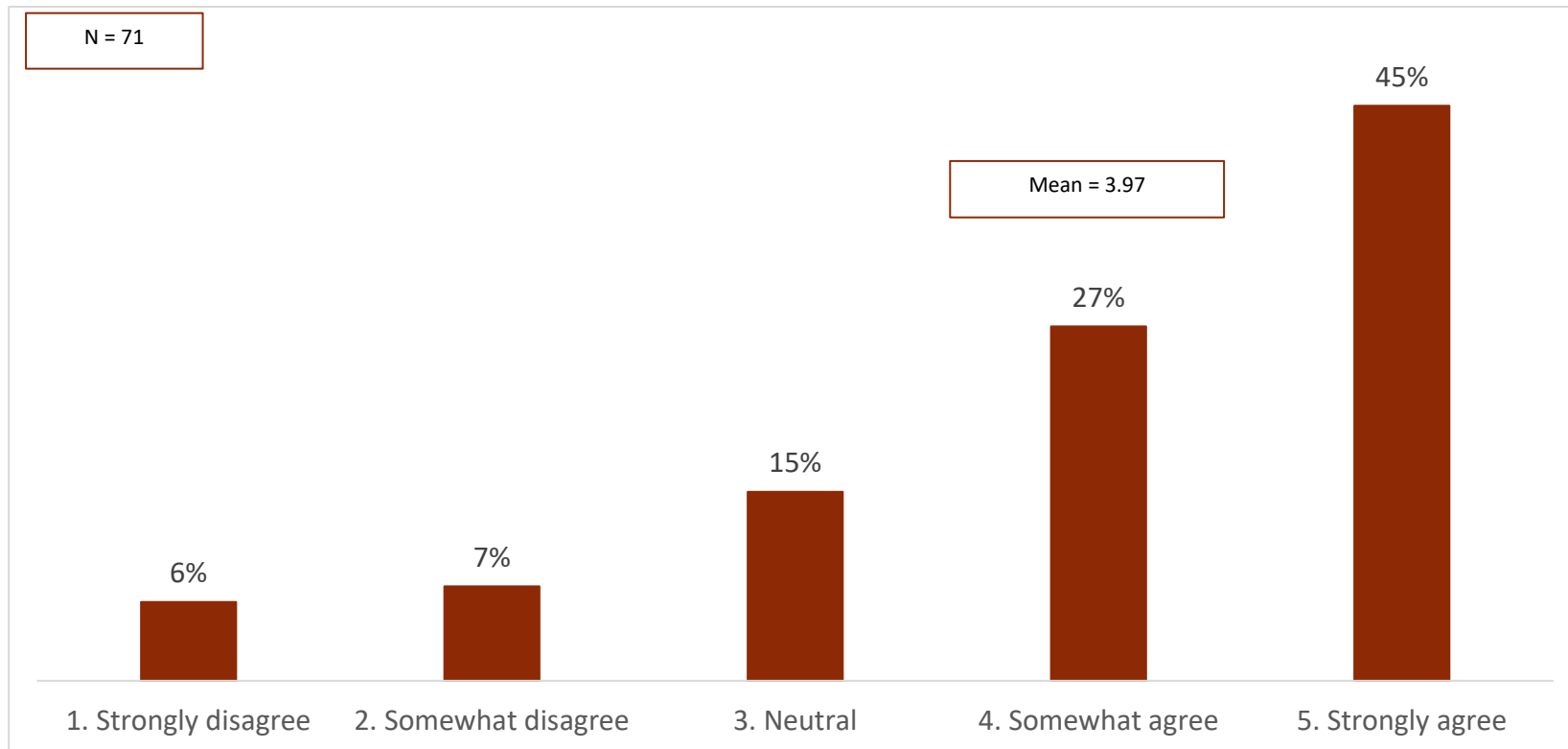
Broadband Connectivity Plan

Q. Does your Municipality/Education Organization/First Nation currently have a formal plan or strategy for broadband connectivity?

- **91%** of survey respondents not able to access high speed internet said their Municipality/Education Organization/First Nation currently DOES NOT have a formal broadband connectivity plan; and

- Only **9%** of survey respondents who completed this section said their Municipality/Education Organization/First Nation currently has a formal broadband connectivity plan.

Broadband Connectivity Planning

Q. Which of the following best describes the level of planning Municipality/Education Organization/First Nation has done when it comes to broadband connectivity?

- Majority **(67%)** of survey respondents who completed this section said the statement that best described their level of planning when it comes to broadband connectivity is **"We do not have a broadband plan"**;

- **15%** of respondents who completed this section said **"We have a general sense of our needs and priorities but lack the resources and capacity to move forward"** best describes their degree of preparation when it comes to broadband connectivity; and

- **7%** of survey respondents not able to access high speed internet said when it comes to broadband connectivity, they best define their level of preparedness as **"Our community or orgaization worked with, or is wokring with, an internet service provider to implement what we need without a formal broadband plan"**.

Category	Percentage
We do not have a broadband plan.	67%
We have started a broadband plan but are unsure of how best to proceed.	1%
We have a general sense of our organizational / community needs and priorities but lack the needed resources / capacity to move forward.	15%
We have created a broadband plan for our community or organization and are thinking through how best to implement it.	1%
Our community or organization worked with, or is working with, an Internet Service Provider to implement what we need without a formal broadband plan.	7%
We have a formal broadband plan completed and implemented for our community or organization.	4%
I don't know	6%

N = 71
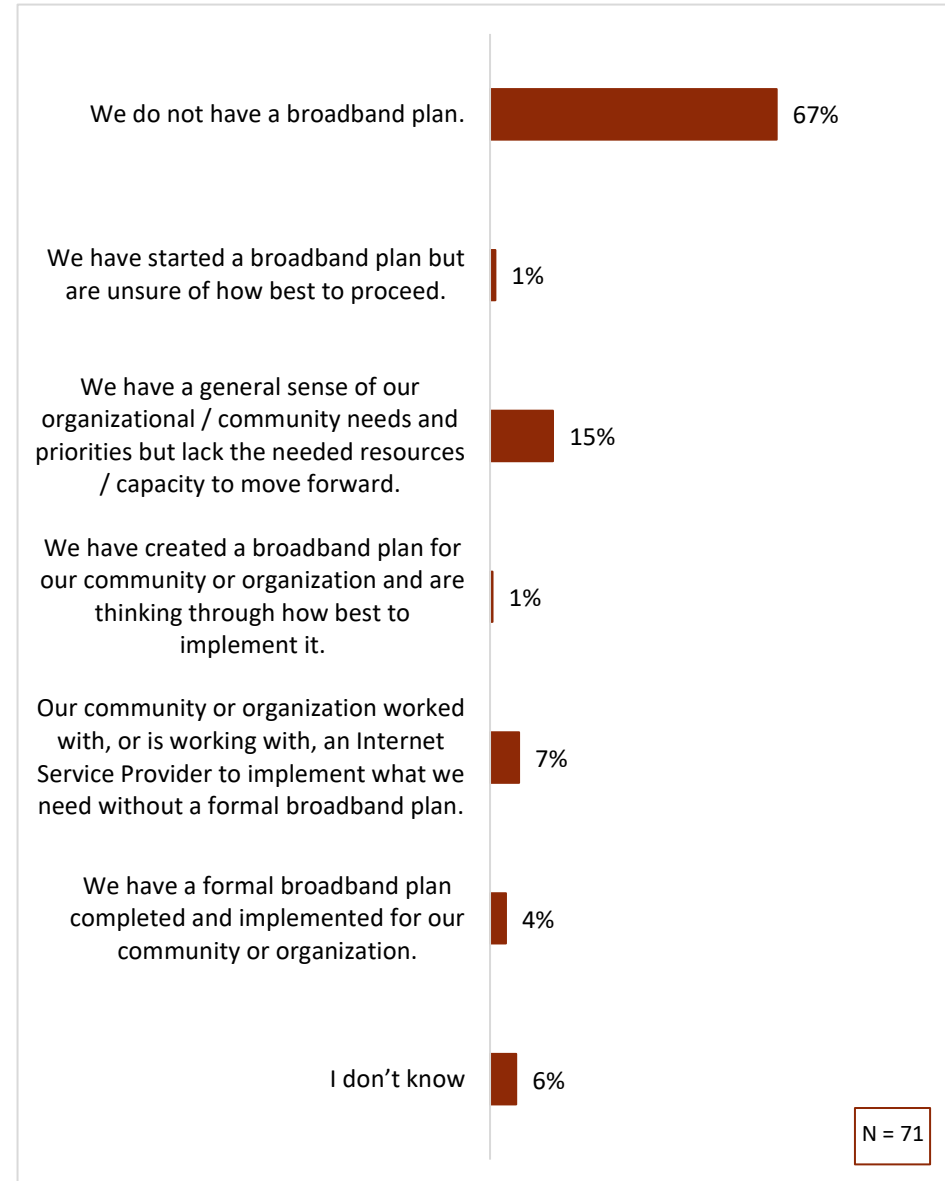
Regional Planning

Q. Please indicate which best describes how much <u>regional planning</u> your Municipality/Education Organization/First Nation has undertaken related to broadband planning with other First Nations, communities or organizations in your region:

- Majority **(72%)** of survey respondents not able to access high speed internet said they have not consulted internally or with other communities or organizations in their region regarding broadband connectivity; and

- **12%** of survey respondents who completed this section indicated they were unaware of any discussions that took place about broadband connectivity internally or with other towns or organizations in their region.

72%	7%	7%	1%	12%
Our community or organization has not consulted internally or with other communities or organizations in our region regarding broadband connectivity.	We have met internally with our own community members or organization regarding regional planning, but not with other entities in our region.	We have started discussions with neighbouring municipalities, local organizations, and/or First Nations regarding regional planning for broadband connectivity.	We have a regional broadband plan based on regional collaboration.	I don't know

N = 71

Grant Funding Available

Q. To what extent are you aware of the following grant funding that is currently available?

- **73%** of survey respondents not able to access high speed internet said they are not aware of **Federal funding** that is currently available; and
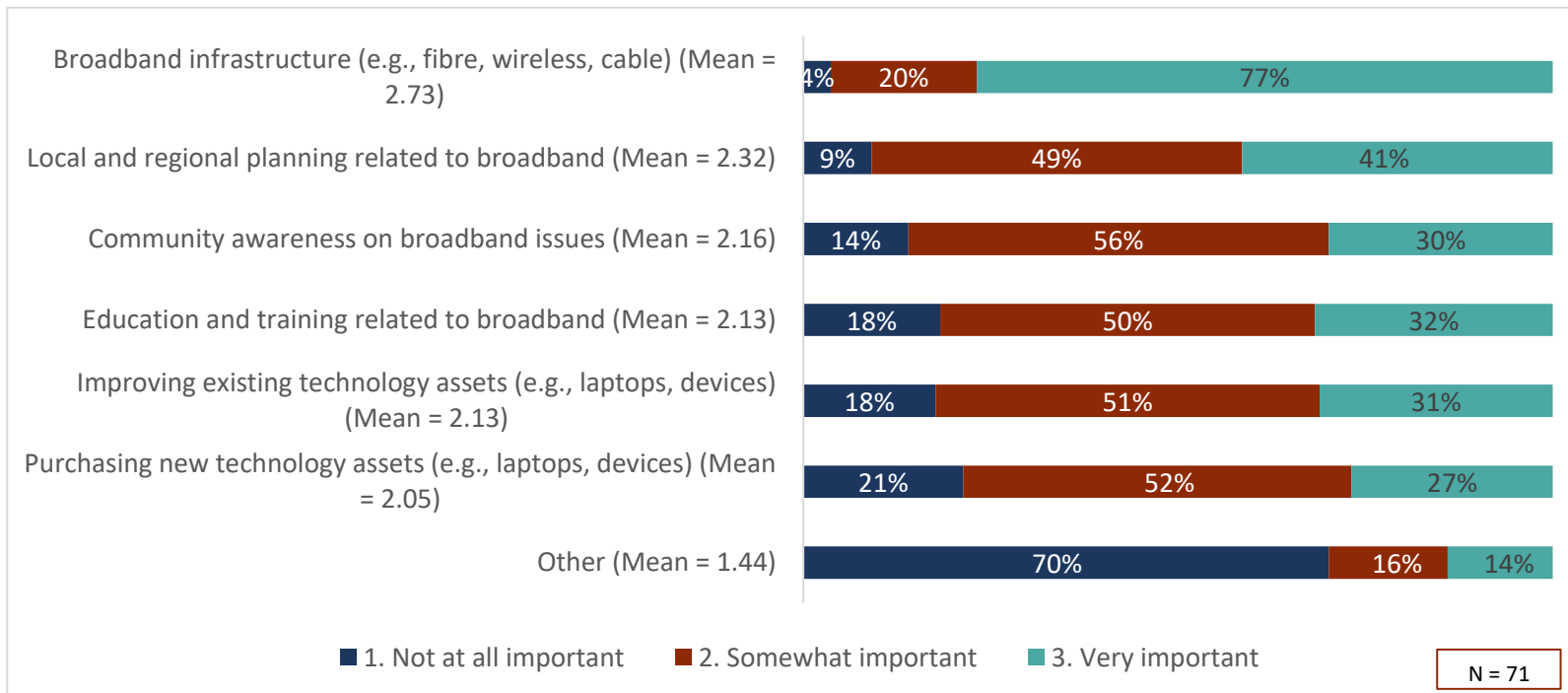
- **75%** of survey respondents not able to access high speed internet indicated they are not aware of any **Provincial funding** that is currently available.

Federal funding (Mean = 1.31): 73% — 22% — 4%
Provincial funding (Mean = 1.27): 75% — 22% — 2%

Legend: ■ 1. Not aware ■ 2. Somewhat aware ■ 3. Very aware

N = 71
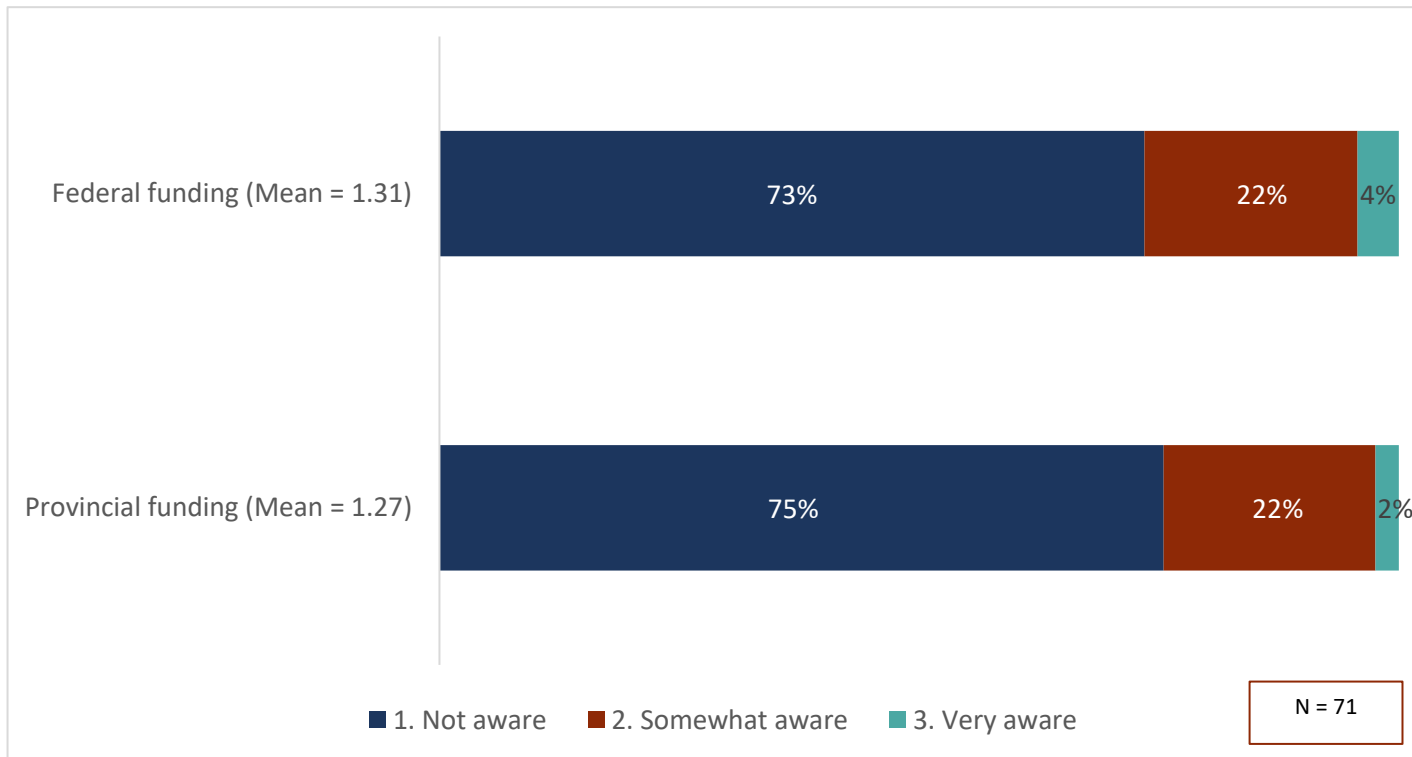
Investment Dollars

Q. If more funding were available, where would investment dollars need to be allocated to be most effective in supporting your Municipality/Education Organization/First Nation? Please indicate how important it would be for investment dollars to be allocated to each of the following areas:

- **77%** of survey respondents who completed this section said broadband infrastructure is very important when is comes to investment dollars allocated;

- When it comes to investment funds allocated, **41%** of respondents not able to access high speed internet indicated local and regional planning related to broadband is very important; and

- Community awareness on broadband issues is very important to **30%** of respondents who not able to access high speed internet when it comes to investment dollars.

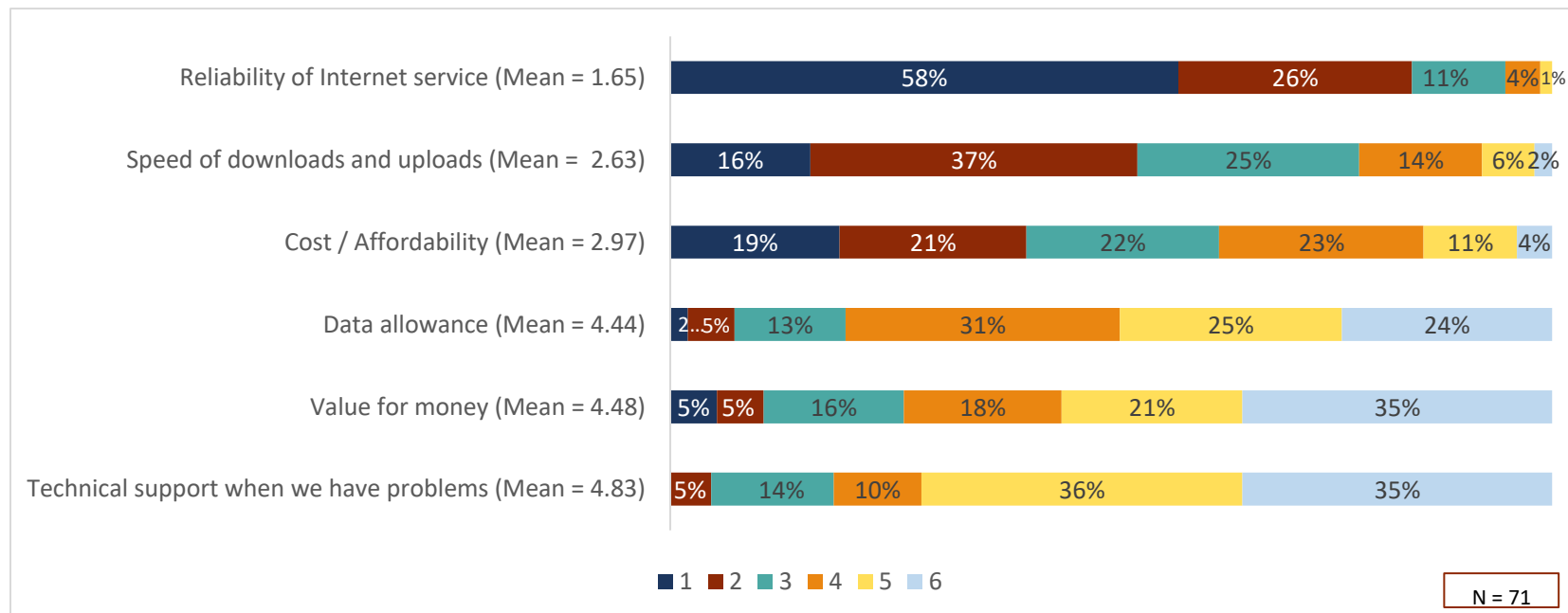| Category	1. Not at all important	2. Somewhat important	3. Very important
Broadband infrastructure (e.g., fibre, wireless, cable) (Mean = 2.73)	4%	20%	77%
Local and regional planning related to broadband (Mean = 2.32)	9%	49%	41%
Community awareness on broadband issues (Mean = 2.16)	14%	56%	30%
Education and training related to broadband (Mean = 2.13)	18%	50%	32%
Improving existing technology assets (e.g., laptops, devices) (Mean = 2.13)	18%	51%	31%
Purchasing new technology assets (e.g., laptops, devices) (Mean = 2.05)	21%	52%	27%
Other (Mean = 1.44)	70%	16%	14%

N = 71

Broadband Connectivity Importance

Q. Please rank the importance of the following factors, from most important to your Municipality/Education Organization/First Nation when it comes to broadband connectivity, to next most important and so on.

- **58%** of survey respondents not able to access high speed internet said **reliability of internet service** is most important when it comes to broadband connectivity;

- When it comes to broadband connectivity, **19%** of respondents not able to access high speed internet indicated **cost and affordability** is important; and

- **Speed of downloads and uploads** are important to **16%** of respondents that completed this section when it comes to broadband connectivity.

* NOTE: On average, **reliability of internet service** receives a mean rating of 1.65 on the 6-point scale which indicates higher overall importance.

	1	2	3	4	5	6
Reliability of Internet service (Mean = 1.65)	58%	26%	11%	4%	1%	
Speed of downloads and uploads (Mean = 2.63)	16%	37%	25%	14%	6%	2%
Cost / Affordability (Mean = 2.97)	19%	21%	22%	23%	11%	4%
Data allowance (Mean = 4.44)	2..5%		13%	31%	25%	24%
Value for money (Mean = 4.48)	5%	5%	16%	18%	21%	35%
Technical support when we have problems (Mean = 4.83)	5%		14%	10%	36%	35%

N = 71

SECTION THREE: Impact

Improved Broadband Connectivity

Q. How important are each of the following to your Municipality/Education Organization/First Nation when thinking about broadband connectivity or improved broadband connectivity?

- Student learning and distant education is most important to majority **(72%)** of survey respondents when it comes to improved broadband connectivity;

- When it comes to better broadband connectivity, **66%** of respondents said home-based and remote-working employment opportunities is very important; and

- **62%** of respondents said community health care needs and services are very important when it comes to greater broadband connectivity.

	1. Very unimportant	2. Somewhat unimportant	3. Neutral	4. Somewhat important	5. Very important
Student learning and distance education (Mean = 4. 50)	5%	2%	4%	18%	72%
Home-based and remote-working employment opportunities (Mean = 4.44)	4%	3%	5%	22%	66%
Community health care needs and services (Mean = 4.30)	6%	2%	10%	19%	62%
Agricultural-based businesses and farms in region (Mean = 4.28)	6%	2%	10%	21%	61%
Child / family wellness (Mean = 4.27)	5%	2%	8%	31%	54%
Population attraction & retention (Mean = 4.11)	2%	5%	19%	27%	47%
Seniors' wellness (i.e., isolation, mental health) (Mean = 4.08)	6%	2%	15%	33%	44%
Investment attraction (Mean = 4.05)	2%	5%	23%	26%	44%
Other (Mean = 2.73)	36%	1%	39%	3%	21%