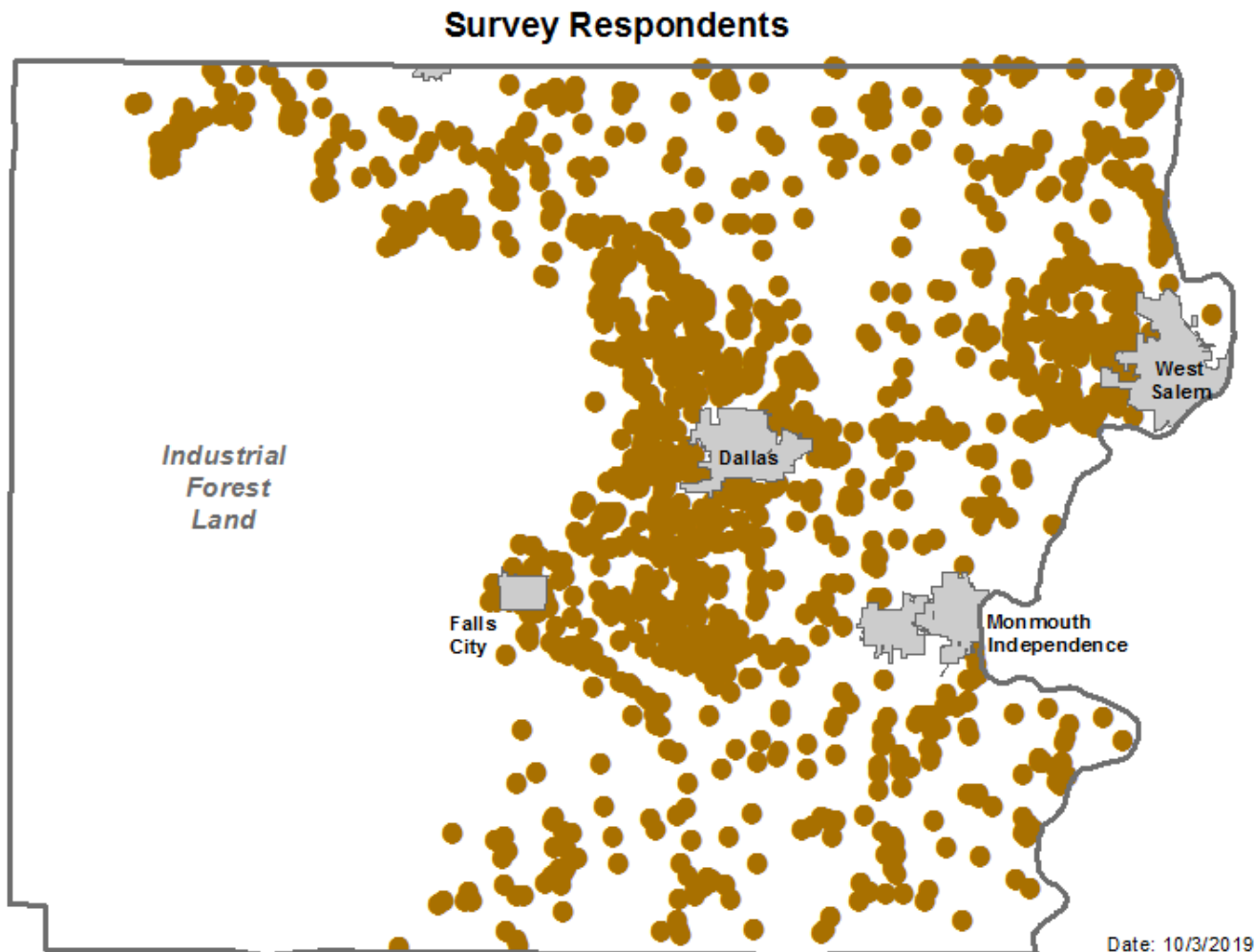


The Polk County Board of Commissioners have been approached repeatedly over the past few years by individuals stating that services provided to rural citizens in Polk County is poor and cannot be used to access needed services such as education, business, and safety. Unfortunately, the State of Oregon and federal government have reported that rural citizens generally have access to great services that meet the national broadband standard. To address this issue, the Commissioners requested Polk County Information Services conduct a study to answer basic questions about internet services being provided to rural citizens.

1. Who are the internet service providers?
2. What level of service is being provided?
3. What are citizens using the internet for?
4. What is the general cost of service?
5. How do citizens rate their service?
6. Would they like better service?

In the summer of 2019 Polk County IT sent out over 5000 surveys to rural property owners outside the city limits of Dallas, West Salem, Monmouth, and Independence. Property owners were asked to complete the survey and mail it in or go to the county website and complete the on-line survey. The number of survey respondents was overwhelming. Approximately 32% of the property owners responded as illustrated in the following map.



SURVEY RESPONSES

1. Who are the internet providers in Rural Polk County?

There are a large number (17) of internet providers in Rural Polk County as summarized below.

Primary Service Type *	Provider	Percent**
Mobile Wireless	AT&T	2.4
	Verizon	6.7
DSL	CenturyLink	36.0
Cable	Comcast/Xfinity	5.4
	Spectrum/Charter	4.1
	Wave	.9
Fixed Wireless	Adaptive Broadband	1.2
	Alyrica	6.2
	OnlineNW	10.5
	Viser	1.4
Satellite	Dish	2.1
	HughesNet	7.4
	Viasat	6.3
--	Other***	3.0
--	None	3.4
--	Unknown	3.2

* - Most providers deliver services with a variety of types. This is an estimate of the primary service type as provided in Polk County.

** - Rounded to nearest 1/10th%

*** - Additional providers with less than 0.75% response

Provider Summary

- There are 17 internet service providers in Polk County.
- Survey respondents are trying to get connected and use a wide variety of providers to do so.

2. What level of service is being provided?

The survey respondents that had service were asked to estimate their level of service into a standard speed category or by the number of devices and approximate use as summarized below (to the nearest 1%).

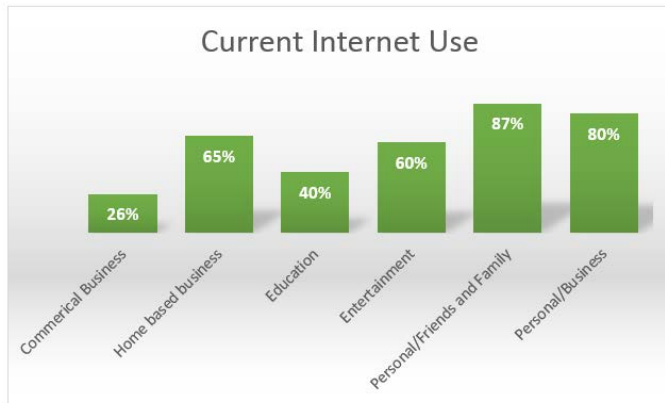
Simple	1 Device < 2Mbps – (Email/Facebook)	14%
Basic	1-2 Devices 2-4 Mbps – (Simple + simple video)	22%
Standard	2-3 Devices 5-10 Mbps – (Basic + videos)	35%
Enhanced	3-4 Devices 10-20 Mbps – (Standard + Hi Def Video)	19%
Broadband	5+ Devices > 20Mbps – (Enhanced + Gaming)	11%

Level of service summary

- Over 25% of respondents have services below “standard” internet access (speeds less than 5Mbps).
- Almost 90% have service that is well below the federal definition of broadband service.
- According to reports from broadbandnow.com (1), the average speed of internet in Oregon is 42.8 Mbps and 90% of Oregonians have access to 100 Mbps or faster service.

3. What is the internet used for?

The survey asked respondents to identify the different ways they used the internet by selecting provided categories as the following table summarizes to the nearest 1%.

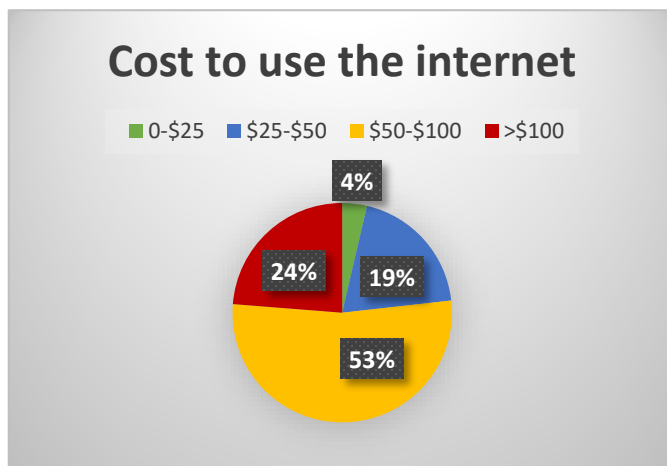


Internet Use Summary

- 80% of the respondents use the internet for personal business.
- 40% of the respondents use the internet for education.
- A significant number of respondents use the internet for commercial or home based business.

4. What is the cost of internet service?

The survey asked respondents to identify their cost of service into one of four categories as the following table summarizes to the nearest 1%.

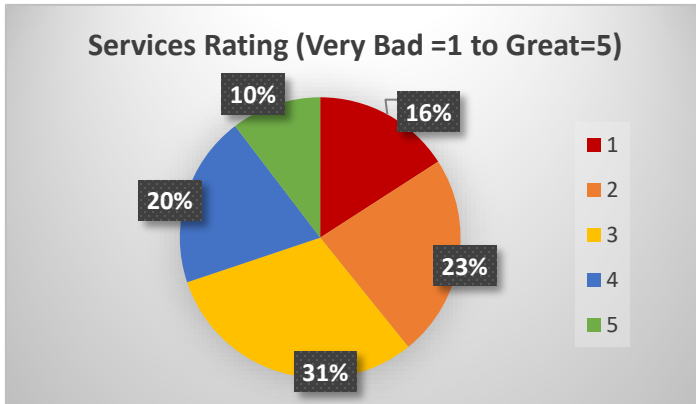


Internet Use Summary

- Over 20% of the respondents pay over \$100/mo for services.
- Over 75% of the respondents pay over \$50/mo for services.
- The average cost for 60+ Mbps with unlimited access in the US is \$60/mo. (2).

5. How do you rate your services

The survey asked respondents to rate their service from 1 (very bad) to 5 (great) as the following table summarizes to the nearest 1%.

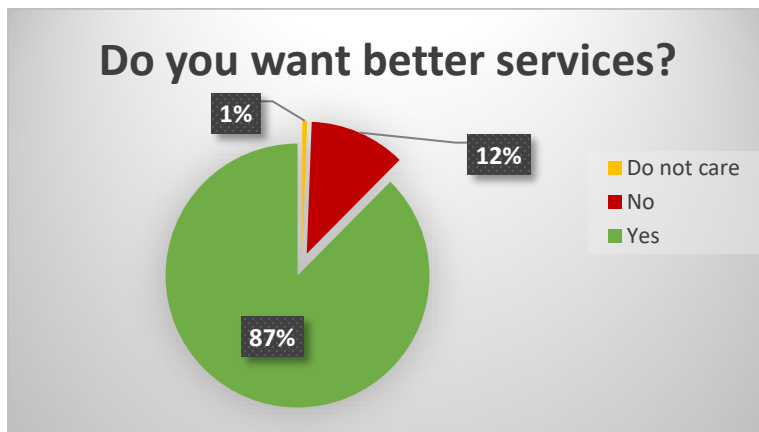


Internet Use Summary

- Almost 40% of the respondents rate their services as being bad.
- Only 30% rate their service as better than OK.
- According to a recent national pole (3) the average ISP received a customer satisfaction rating of 62 out of 100.

6. Who wants better service

The survey asked who wants better services as the following graph summarizes to the nearest 1%.



Internet Use Summary

- Almost 87% want better services.
- For those using the internet for more than just entertainment, such as business, 90% want better service.

COMMENTS

Approximately 7% of the survey respondents felt strongly enough about the survey to add a comment. Comments fell into four categories.

1. **NO 5G** (< 1%) – Significantly against supporting 5G. A sample comment was, “NO 5G!!! This tech. has NOT been adequately safety tested”.
2. **NO Services** (<1%) – Felt strongly about not having internet service to comment. A sample comment was, “Not available for internet service by ANY provider in our area”.
3. **NO Government** (<1%) – Felt strongly that Polk County should not become an internet provider. A sample comment was “I do not want Polk County getting into the Net, like the \$\$\$ Wreck MINET is!!”
4. **Better Cheaper Service** (6%) – Felt strongly that they need cheaper or better service. Two sample comments were: “Latency is a problem with satellite internet, which makes streaming impossible.” and “Should be cheaper! Especially for slow, intermittent.”

Less the 1% of the survey respondents felt strongly enough to call, email or visit the Polk County IT Office. All of these respondents fell into the Better Cheaper Service category.

THE SURVEY

The survey was developed using the following resources.

- Similar surveys conducted by other local governments
- Reports available from the National Telecommunications and Information Administration (NTIA)
- Reports available from the Federal Communications Commission (FCC)
- Surveys conducted by the PEW Research Center

The survey was tested and modified twice prior to being released to the public to ensure that answers accurately addressed the questions being asked. To ensure neutrality a 3rd party vendor was used to manage the mailing and compile responses.

As an important note, the survey did NOT ask respondents to complete a computer based speed test. It was felt that conducting speed tests and accounting for speed test variability exceeded the scope of this study. A significant number of speed tests were conducted using mobile devices as part of the county wireless service evaluation which is part of another study the County is in the process of completing.

NEXT STEPS

- Polk County staff will continue to work on analysis of the results.
- Polk County staff will be publishing a more detailed report with maps in the coming weeks.
- Polk County will hold a public meeting to discuss this issue in the coming months.

References

- 1) Speeds - <https://broadbandnow.com/Oregon>
- 2) Cost of Service
<https://www.highspeedinternet.com/resources/how-much-should-i-be-paying-for-high-speed-internet-resource>
<https://www.allconnect.com/blog/cost-of-high-speed-internet>

<https://www.atlasandboots.com/remote-jobs/countries-with-the-cheapest-internet-world>
<http://cost-finder.com/what-is-the-average-cost-of-internet-around-the-world>

- 3) Customer Satisfaction - ACSI Telecommunications Report 2018-2019 - May 21, 2019
<https://www.theacsi.org/news-and-resources/customer-satisfaction-reports/reports-2019/acsi-telecommunications-report-2018-2019>