

## Curry County Telecommunications Survey Results

Telecommunications planners strengthen their policy determination and strategic planning efforts by continually identifying and understanding trends for their region. Decision makers often rely on long-term demographic and economic projections, based on current trends and foreseeable influences, in their strategic planning. Surveys complement information gathered from a variety of sources, for example, demographic analysis or economic projections. These tools are essential for planning and policy determination. However, they alone are not sufficient. Many contributing factors can compound one another in ways difficult to predict.

While the survey (see Appendices) was not “random”, and as such not mathematically extensible across all of the population of the region, it did see a sufficiently high enough return rate to help us guide policy-making for the county.

Over the month of January – March, 2007 the Curry County Port Orford, Gold Beach and Brookings Chamber of Commerce memberships and others responded to a survey on various factors related to telecommunications and new economy skills. The results are best used to understand how small to mid-sized entities of the area think about these factors. When reviewing the responses keep in mind that this population was predominantly composed of businesses and government.

The response rate of 31% exceeded expectations and demonstrates the growing interest in telecommunications issues; reflecting growth in Internet access, importance of advanced services, ownership of personal computers and a number of other factors useful for planning purposes.

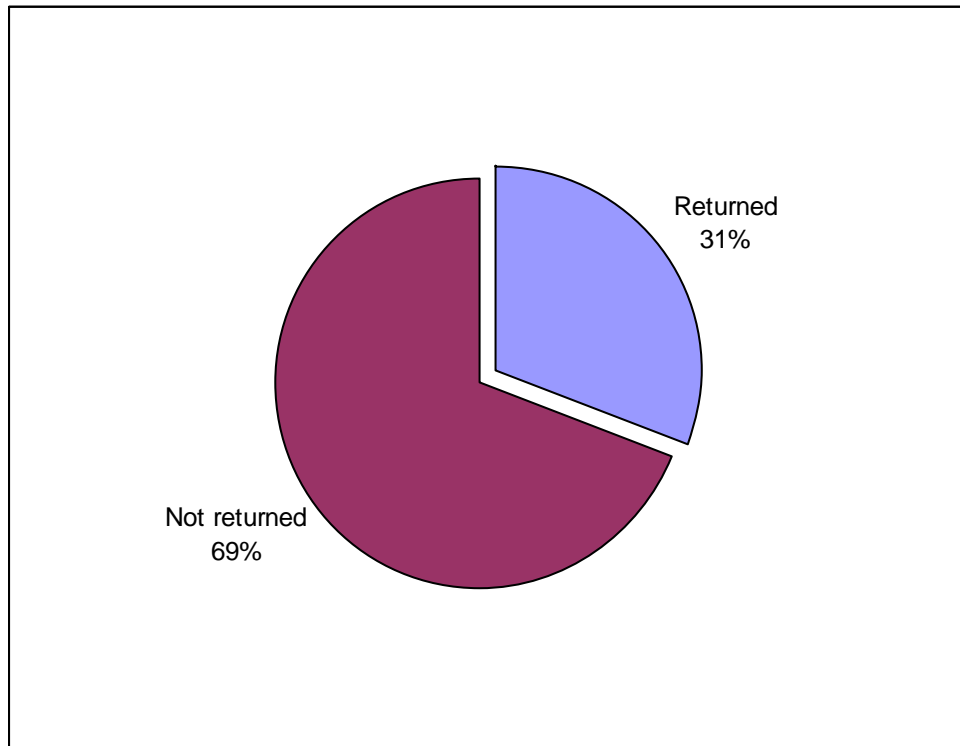


Figure 1 - Survey Responses

Responses were received from throughout the county with 32% from unincorporated areas and 65% from the incorporated areas of the county.

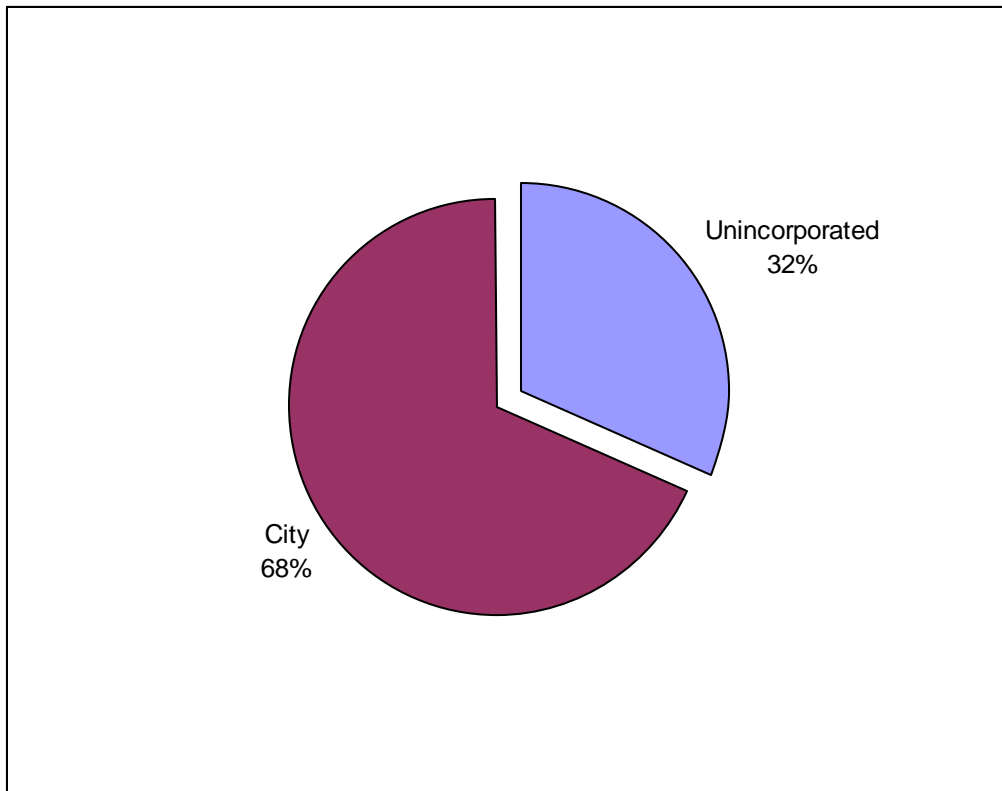


Figure 2 - Areas Responding to the Survey

Sectors represented by the survey population are indicative of the chamber memberships and presents a picture of a service-oriented economy. Retail (17%) and services (11%) constitute 34% of the responses. Construction (10%) and real estate (11%) likely are linked and likely correlates to the housing construction “boomlet” occurring in response to inward migration of retirees. Hospitality/lodging (7%) is a component of tourism related economic activity. Healthcare (8%) responses seemed to be largely driven by small direct service delivery organizations, a number of which indicated they were a home business. Manufacturing (3%) responses was surprisingly low. However, this is not too surprising, as they often tend to belong to other sector-oriented organizations.

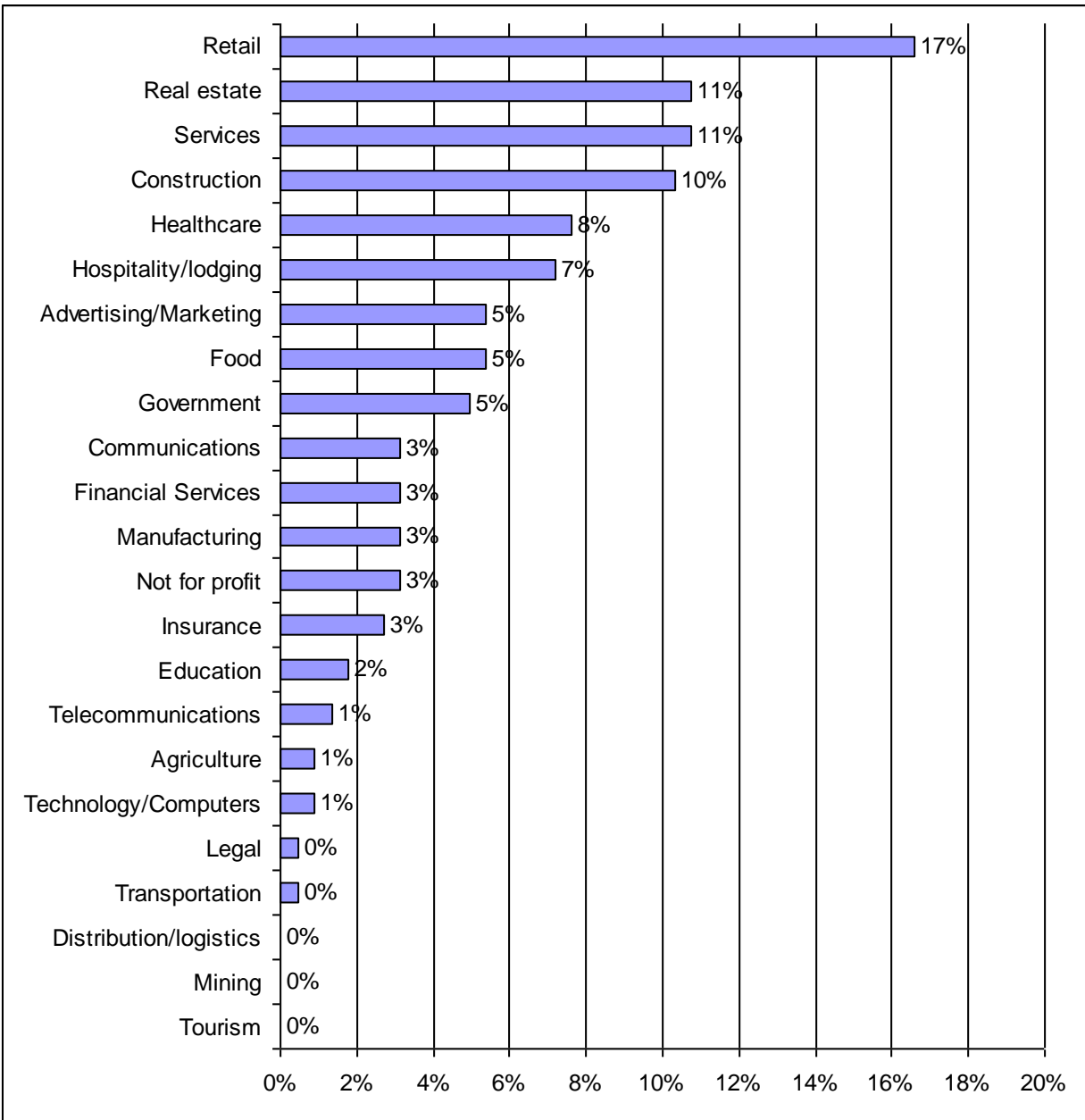


Figure 3 - Sectors

Nearly a third of respondents indicated they were a home-based business.

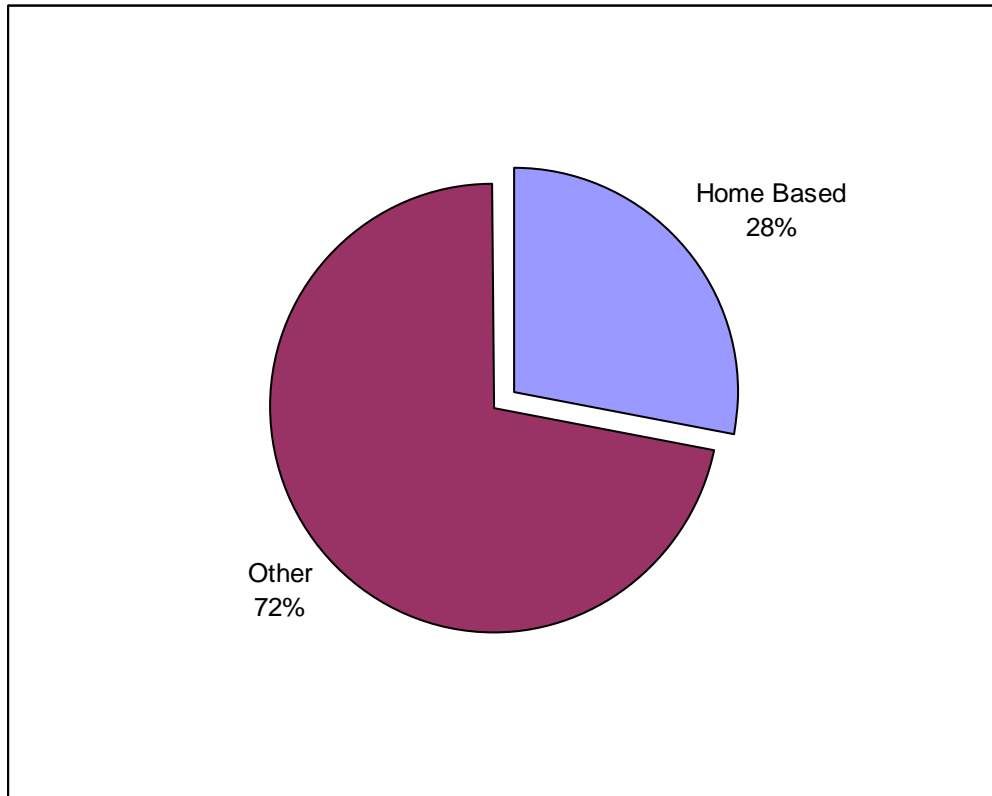


Figure 4 - Home Based Businesses

Telecommunications Connections indicate the expected high level of landline connections (95%) and a high level of cellular phone connections (69%). Everyone had at least one form of telephony connection.

TV connections for cable (36%) and satellite (15%) is on par with expectations, keeping in mind that these were predominantly businesses and government responses. TV reception with an antenna was reported at 4%. It was no surprise to find use of Satellite Wireless Internet (7%) given the rurality of the county, although there were a couple of instances where the respondent's business was apparently located in the Charter cable footprint (not every survey was returned with the business name and/or specific location).

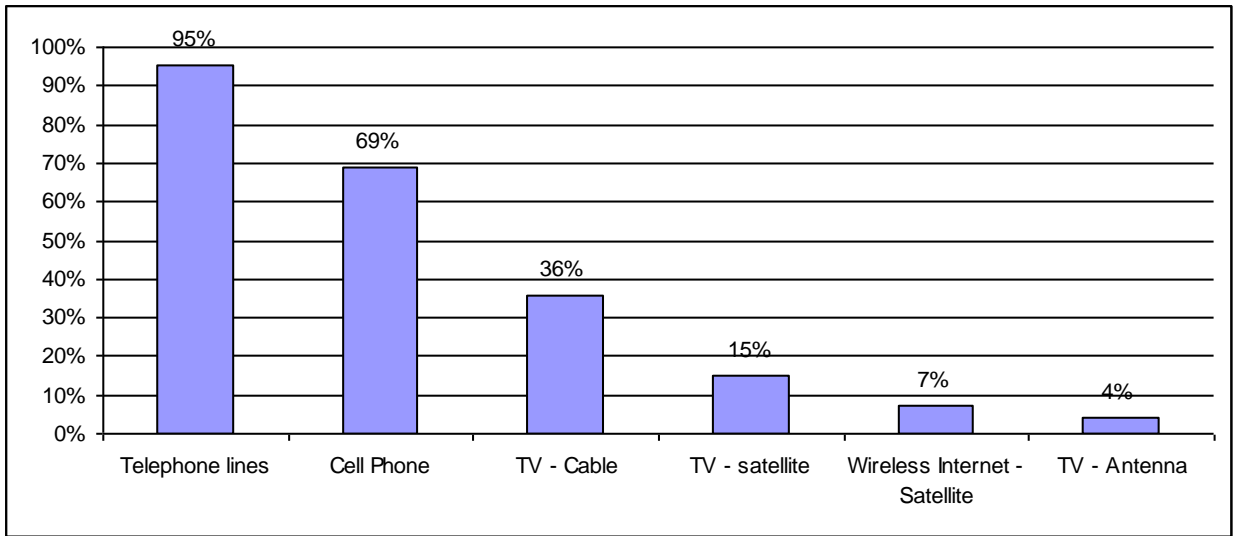


Figure 5 - Telecommunications Connections

Curry County businesses and government Plain Old Telephone (POT) usage revealed that telephony use is predominantly dedicated for Business (92%). A substantial number of lines are dedicated for FAX usage (53%). Lines dedicated to Internet dial-up were at 31%! Personal / Family Use (47%) was not surprising given the number of home-based businesses, and honest.

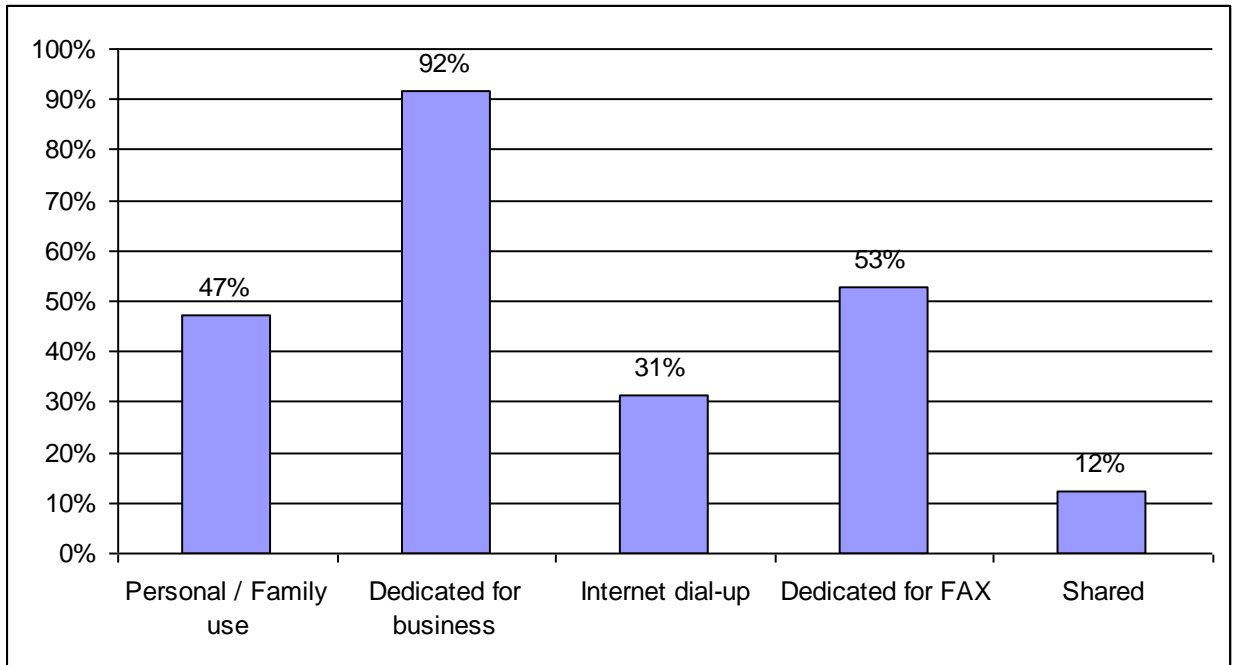


Figure 6 - Plain Old Telephone (POT) Usage

Service provider ratings indicated 70% of respondents (Excellent – 14% and Good – 56%) were largely satisfied with their telephony service. This flies somewhat in the face of anecdotal reporting derived from interviews. There the complaints generally were linked to failures due to service interruptions of from fiber cuts (i.e., this cuts to the route redundancy issues).

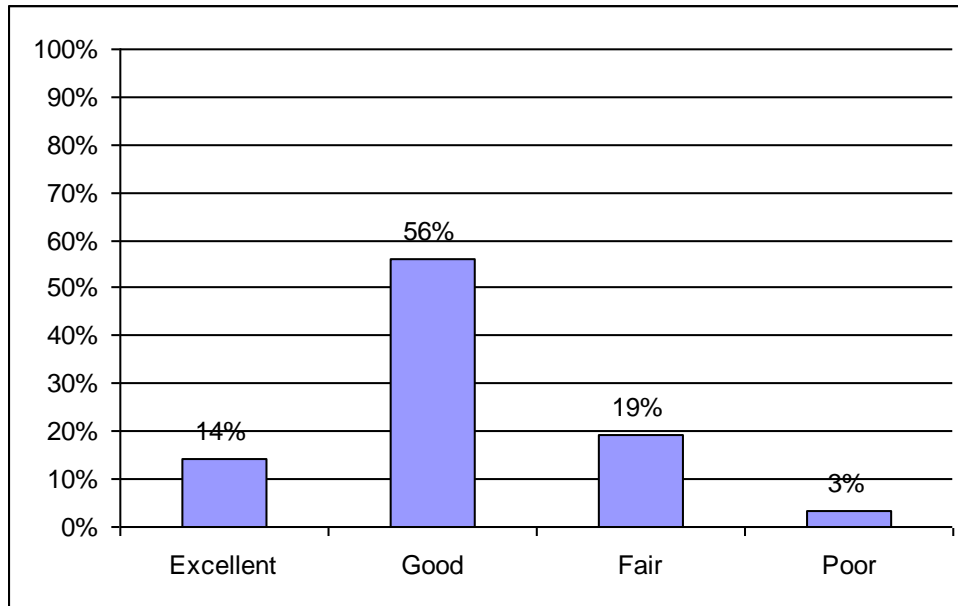


Figure 7 - Service Provider Ratings

PC Ownership and Usage indicated a very high level of PC ownership (95%). Word Processing (88%) was the highest indicated PC application. Spreadsheet usage at 68% was a near second. Database (64%), Digital Photography (57%) and Presentations (35%) followed

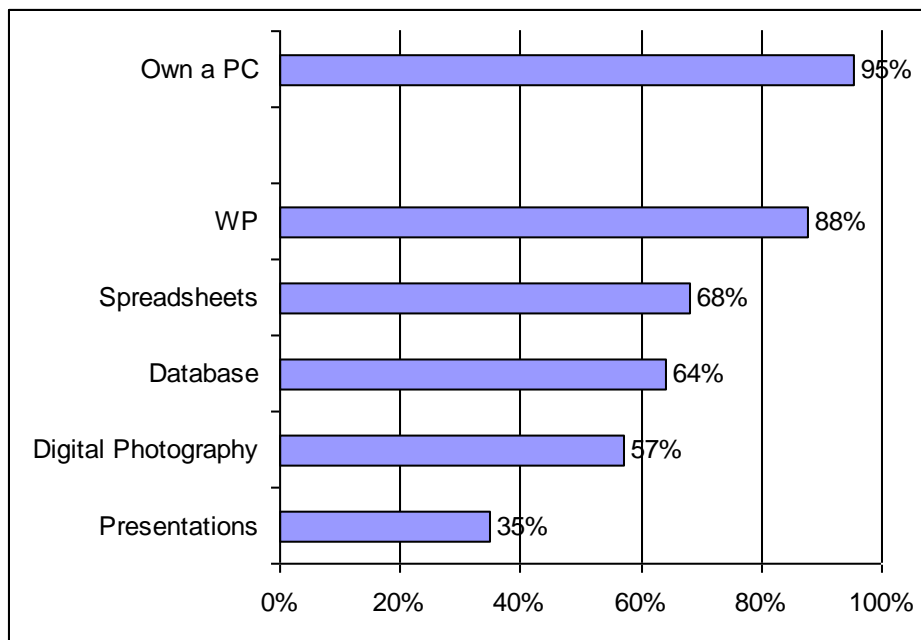


Figure 8 - PC Ownership and Usage

Other uses of PCs included:

HIS/PACS	Bookkeeping
VoIP, publishing, project management	Design & running outdoor printers
Programing	Invoicing
Music	POS & windows merchant services
CAD	Internet
Web design and maintenance	Website management

email stock information	Utility billing
Accounting	GIS mapping
Other	Accounting
Websites	Online Publishing
CAD	Accounting
Internet & iChat w/video	Web site building software
Cataloging & circulation	Billing
Webmaster	QuickBooks
PTP, programming, more	QuickBooks
Financial programs	Business checkbooks
Income tax accounting	Web page/business
Payroll	Accounting software
Web page design & maint.	Websites, accounting
Mainframe connection at HQ	CAD
Audio processing	QuickBooks
Banking	Advertising
Bookkeeping	Shopping
Family history software	Billing/scheduling software
Web Development	Banking
Print Work	Purchasing
Command batch	Internet research
eBay	POS
Mapping	Marketing-signs
Programming systems	Patient management software
Point of sale	Bookkeeping, estimates
Order taking, order placing	Inventory/sales/tracking program

Local Area Networks (LAN) were reported (49%) in nearly half of locations.

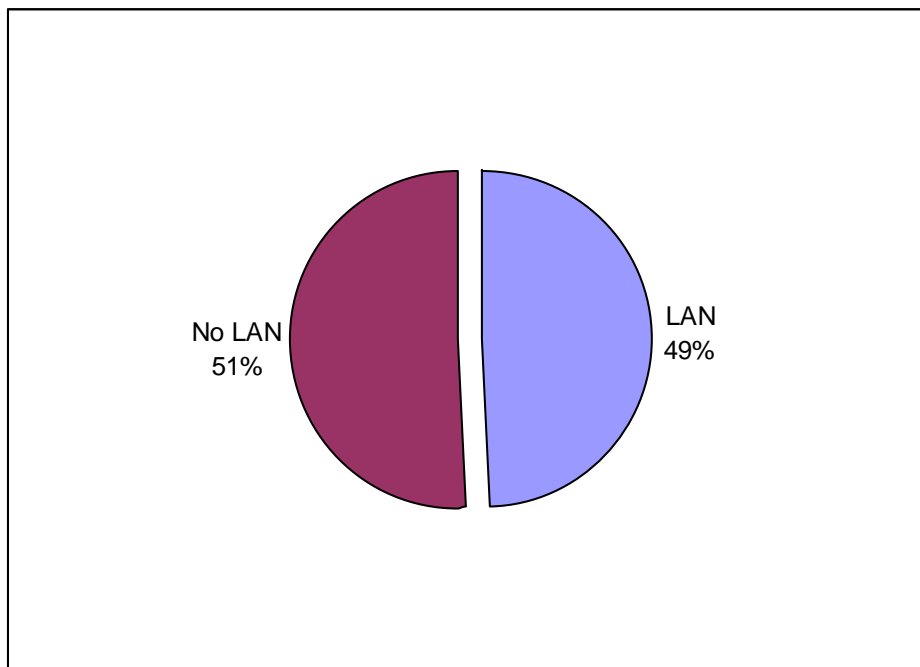


Figure 9 - LAN Ownership

A solid 91% reported use of the Internet/Web in their business. The predominant usage was that of Sending and Receiving Email (87%). Folks are using the Internet/Web to look up information (85%). Online purchases are at 62%. 33% report selling goods or services online. 29% of respondents indicated taking education courses online.

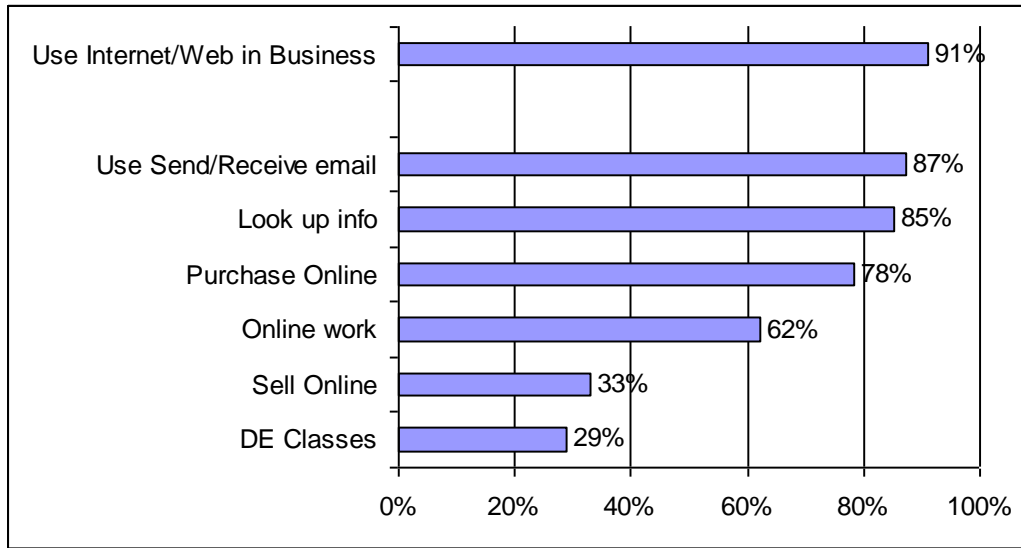


Figure 10 - Business Internet/Web Usage

There is strong interest in Business Management Training (16%).

Respondents indicated Marketing Strategy (26%) was the leading category of interest. Web site design and Maintenance (22%) is a close second.

Running as a pack are e-Commerce (18%), Management (17%), Improve Your Home and Small Business (17%), Finance and Accounting (17%), Sales (17%), Law (16%), Business Communications (16%), Interviewing and Hiring the Right People (15%), and Achieving Balance at Home and at Work (15%).

Credit Sales (7%) and, surprisingly, Building and Operating a Small Business (7%) brought up the rear of the pack.

This would seem to indicate a strong interest in growing the existing businesses of chamber members and others. Interestingly, was the strong showing of Marketing Strategy, Web Site Design and Maintenance, and e-Commerce. These areas have strong dependencies on a robust telecommunications infrastructure.



Figure 11 - Business Management Training

Access and Speed are related. In the Access category 71% rated this as Critical to Very Important. Only 7% rated Access as Not Important, although that seems high.

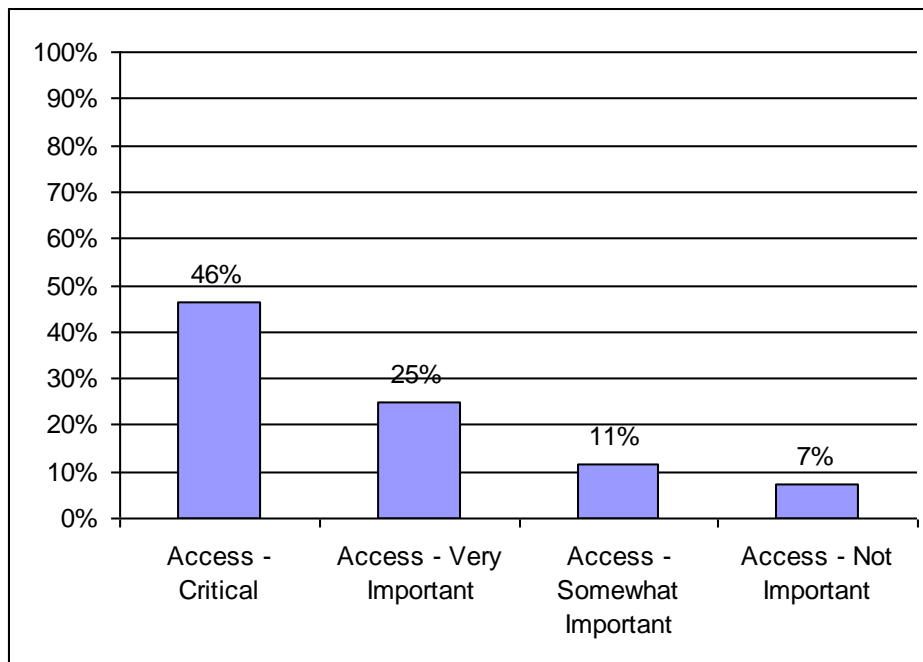


Figure 12 - Access

In the Speed category 69% rated this as Critical to Very Important, whereas 7% rated Speed as Not Important, this again seems high in this day.

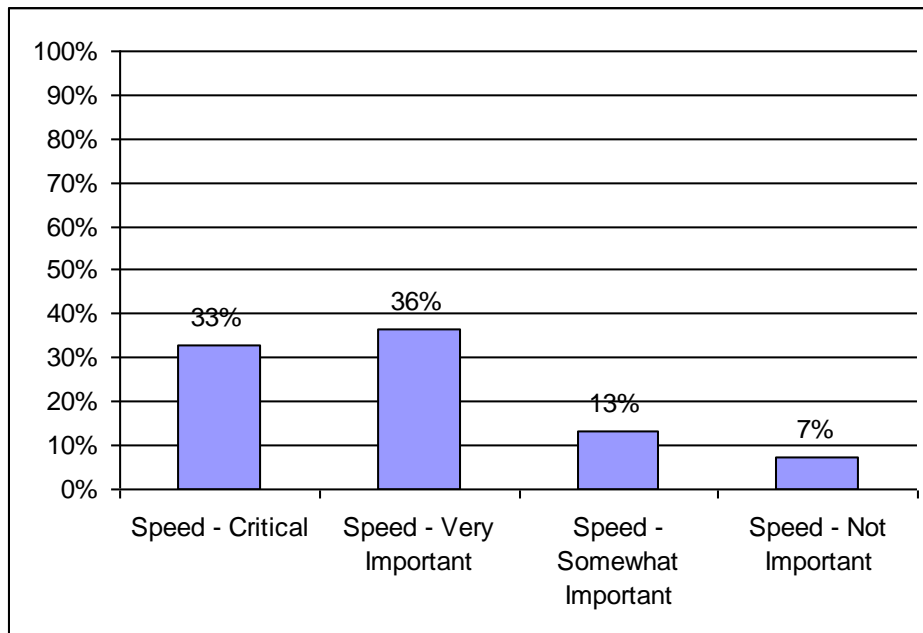


Figure 13 - Speed

Paying for more Speed (37%) was not supported fully by the amounts people are willing to pay. Indeed, many reported a willingness to pay for more speed and then indicated a lesser amount than they currently pay. This is consistent with the general lack of understanding of the cost of providing services as well as the value derived from those services. It may very well be that those wishing a lower price point have not as yet realized the full value that can be derived from the broadband service. Yet 12% indicated a willingness to pay over \$60. This is likely to be the price point for Charter's 10 mbps service when it is made available.

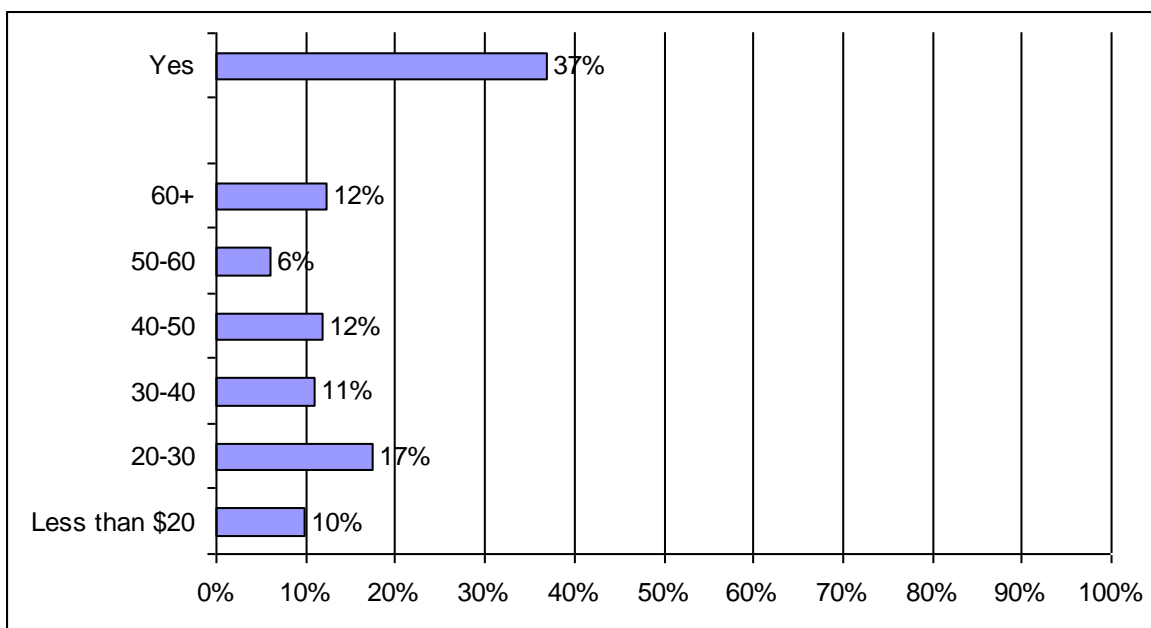


Figure 14 - Pay for Speed

When asked about their view of telecommunications technologies that would be important to the future, many respondents indicated little or no knowledge of Virtual Private Networks, DS/3,

Fast Ethernet, Gigabit Ethernet. Again this is not a surprising finding in that the vast majority of those responding were relatively small entities.

Wireless (land-based) (32%) dominated the future view. T-1 (24%), Cable (24%) and Wireless Satellite (24%) were neck and neck. It's not too surprising to see ISDN (1%) at the bottom of the heap. This is an aging technology that is being replaced.

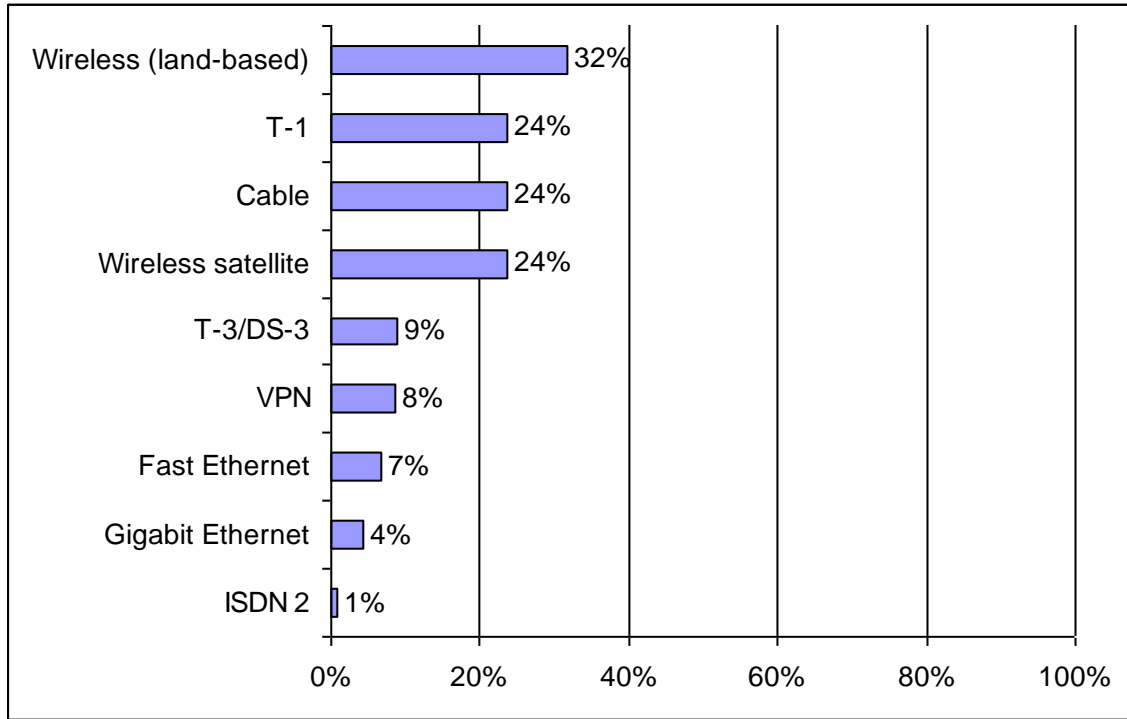


Figure 15 - The Future

13% of respondents indicated videoconferencing would be of value, either it's already on site (4%) or there is a perceived need for videoconferencing (9%). This reflects the view of the importance of face-to-face encounters. Videoconferencing availability would pay for itself in short order in saving of dollars for travel expenses and time to travel.

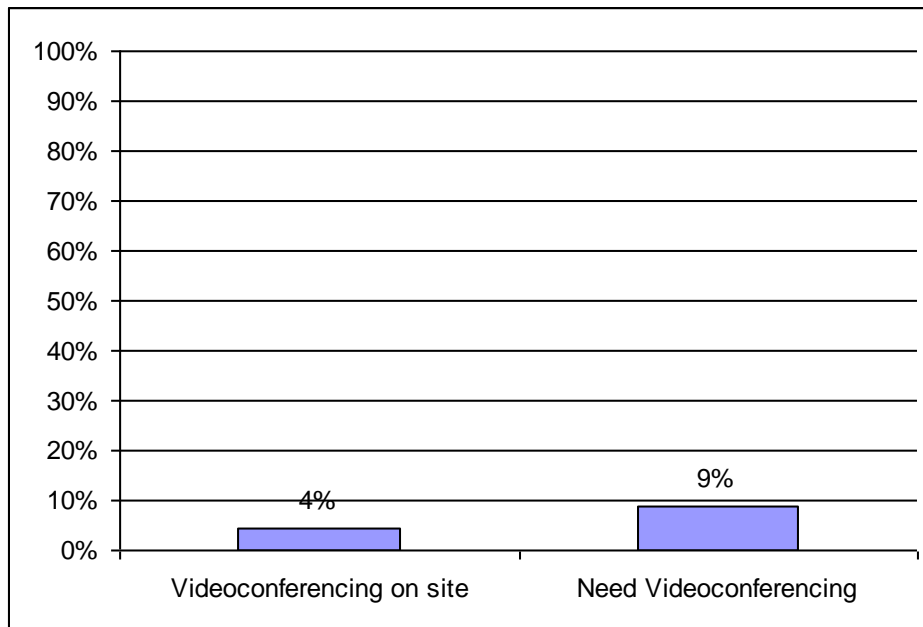


Figure 16 - Videoconferencing

Comments – Voice:

Cellular phones dominated these comments...

- Cell provides some "spotty" redundant coverage
- Better cell coverage
- Poor cellular coverage in our area
- Cell -- coverage outside of communities
- Cellular service is abysmal at best. No competition.
- Continuity of connection.
- Cellular service on the rural OR coast is extremely poor and is only going to get worse with the new GSM technology.
- Spotty cell service throughout the county.
- Cellular service is spotty and has lots of room for improvement.
- Need more towers.
- Better cell phone service.
- Verizon is poor customer service.
- Cell service does not provide full area coverage.
- Cellular does not work in many places.
- Need more comprehensive cell coverage. Too many "dead zones" along coast and up Chetco River.
- Cellular rates are too high compared to large cities. There are more options and more providers in large cities --> lower prices.
- No cell service between Gold Beach & Brookings
- Service is intermittent for cell phones
- Call service between towns needs to increase
- Cellular reception very poor in town and outlying areas. Very expensive.
- Spotty cellular service in county
- Cellular coverage area, cost of landline service
- Need more cell towers between Brookings & GB
- Edge Wireless-sucks, poor service

- Need better Verizon cellular reception
- Cellular service provided by Edge is very poor. No other GSM provider in area.
- Cell phone needs to be better! Can't use it at the business. Have to go outside.
- More cellular choices
- Cellular tower coverage
- Cell phones are terrible around here!
- Cellular service in this area is too hit or miss-way too many "dead spots"!
- Cell coverage & service needs improvement.
- Too many non-service areas
- US Cellular is great!

Other comments ranged in their scope...

- This is OK as is.
- No loop - only one wire out of area.
- Increasing phones in office. What is least expensive and best phone system?
- Long distance costs too much.
- % of calls that are blank or telemarketer.
- Single source for landline is outrageous! Verizon is NOT customer oriented. No services such as v-mail in GB.
- Poor service.
- Verizon charges are out of line and they have a predatory attitude.
- Dial-up service for credit cards fails consistently
- Landlines are expensive for service provided.
- Verizon is horrible. Unicom is all bad. Verizon is a monopoly. Unicom is a bad second.
- Too many vendors & confusion for decisions on whose service to use.
- Emergency back-up systems (redundancy)
- Why isn't Verizon providing all services to all areas?
- Too expensive
- Payphone arrangement -too expensive
- Verizon rips people off. They have charged me for cable Internet more than once and I can't even get cable Internet at my house.
- Unicom is outstanding!!
- Verizon sucks!
- Consistent service year-round
- Telephone company very difficult to deal w/ lack customer service surveys
- Old outdated telephone lines
- 1 phone for Festival & 1 personal

#### Comments – Internet/World Wide Web

Route redundancy is mentioned often, as is reliability of services. These are often interrelated issues. Cost and lack of competition are addressed.

- EMR/PACS/ebilling regulatory requirement, diagnosis & treatment
- We are improving our website and need active in/out access w/ field auditors and clients.
- Lack of fast Internet on the south coast. Takes 5-10 times longer to do what needs to be done which increases the cost of doing business here.
- Higher speed (landline only possible now)

- Cable Internet costs too much
- No back up for T-1 if cut, need to finish loop to CA.
- Cable or DSL Internet service without it we live in the communication dark age. It's embarrassing.
- Too slow
- Need fast reliable connection. Satellite is awful.
- Prefer satellite but cost prohibitive. Cable adequate but not reliable. No competition!
- Need more speed.
- No loop. No high-speed service.
- We are changing from dial-up to satellite service.
- Need better than dial-up. Currently our only option.
- Faster more dependable service.
- Faster Internet and up to date county procedures for public records and property transactions.
- Fiber connections to Bandon/PO, Brookings, etc.
- Need high speed to come to PO.
- Would like to get DSL here -- downloading is tedious.
- Speed on online.
- Poor service from cable and DSL providers.
- It is too easy for the whole county to be down at once, creating huge loses in productivity. We need more options & high speed lines into the county.
- Verizon service is NON-EXISTENT. Price too high.
- Speed
- We need a high speed Internet connection in PO.
- Slow speed
- No high speed!
- I would like to see some form of high speed Internet put in place in Port Orford.
- Redundancy & competition for pricing
- Limited in this rural area (PO). No service if problem occurs.
- Takes too long.
- Better, faster, less expensive. Available elsewhere.
- It would be nice to have a faster Internet. Our phone lines are too old and they won't bring cable where we live.
- Lack of redundancy
- Need better speed-dial up is not adequate
- Slow connection
- Just cancelled service because can't afford anymore
- Member maintains website
- Connection-response speed
- At the port of Brookings Verizon often says no DSL circuits are available leaving only one option, wireless via Northwest Tech.
- OK
- Carter.net not always reliable. We were out 5 days, which messed up our POS info.
- We need additional services in our area for videoconferencing.
- Cost & access to affordable high speed. The region is antiquated in services and price.
- Port Orford needs high speed!
- Verizon connection is sometimes sketchy-cable is wonderful but not easily available.
- Slow dial-up service. Our area phone lines cause very slow Internet speed- there is no alternative.
- Less the better for high-speed internet

## Comments – Video/Television

Quality of cable reception as well as price is mentioned. Quality will improve once Charter has completed the infrastructure improvements on the Oregon coast. Rates are equivalent to other areas in Charter territory.

- Healthcare/diagnosis, training, medical consults, staff training
- We want to have videoconference calls. Currently our conference calls are \$800/mo. W/ Verizon.
- TV costs too much. It would be excellent to be able to pick up the channels I want w/o having to receive channels I have zero interest in.
- Cost!
- Need fast reliable connection. Satellite is awful.
- Satellite preferred to cable. Service is a monopoly. Need more competition.
- Lousy and expensive choices
- Satellite/cable is too expensive.
- We could use video conferencing if we had the bandwidth.
- Cable company is a joke.
- Lack of truthful information broadcast by media.
- HDTV from local affiliates
- Limited use
- Nothing worth watching
- Why isn't Charter Cable providing high speed to all areas?
- Too expensive
- Cable only choice
- Only one cable company. No competition. Prices go up continually. No choice in channels.
- Poor signal strength (KDR-TV, Medford)
- Video conferencing would be helpful
- No local repeaters-No off the air highdef.-When will the coast go digital?
- Need NY & SF or LA feeds. Local stations are hokey
- We have cable & satellite. When one goes we have the other.
- Charter does not seem especially service oriented and is getting too expensive
- College needs video conferencing-may be coming.
- No HD TV in area
- No cable TV available

## Comments - Other (for example, training)

Comments in this category ranged and indicated a wide range of opinions from the region.

- Moving clinical to technology
- Northwest Technical ISP good
- I am not computer skilled [sic].
- Small business funding sources, grants, loans or investors.
- Most local training is designed for smaller business, start-ups, turnaround, etc. F/M needs are different. It's counter productive for our people to attend training that doesn't help as much as it could.
- SWOCC provides little besides thumb twiddling courses in PO.
- Private computers are presently used due to limited use of computers at site of non profit organization.

- Shipping options.
- Low cost shipping, better public infrastructure, low taxes
- PC- overall costs are mounting regularly
- There are ample training sources available now for those willing to seek them out.
- Please share your results w/ SOCC, especially those re-training.
- Business skill need-how to run a B & B without technology.