

Emphasis on Municipal Broadband

October 2017 Community Survey
Including Comparison of Opinion Leaders with the Mainstream

Prepared Expressly for...



October 2017

Strategy Research Institute
An Institute for CONSENSUS BUILDING
WWW.SRI-CONSULTING.ORG
800.224-7608



San Pablo Community Survey
October 2017

Research Design

Sample size: N=400

Population surveyed: Community-at-large

Sampling Error: ± 4 to 5%

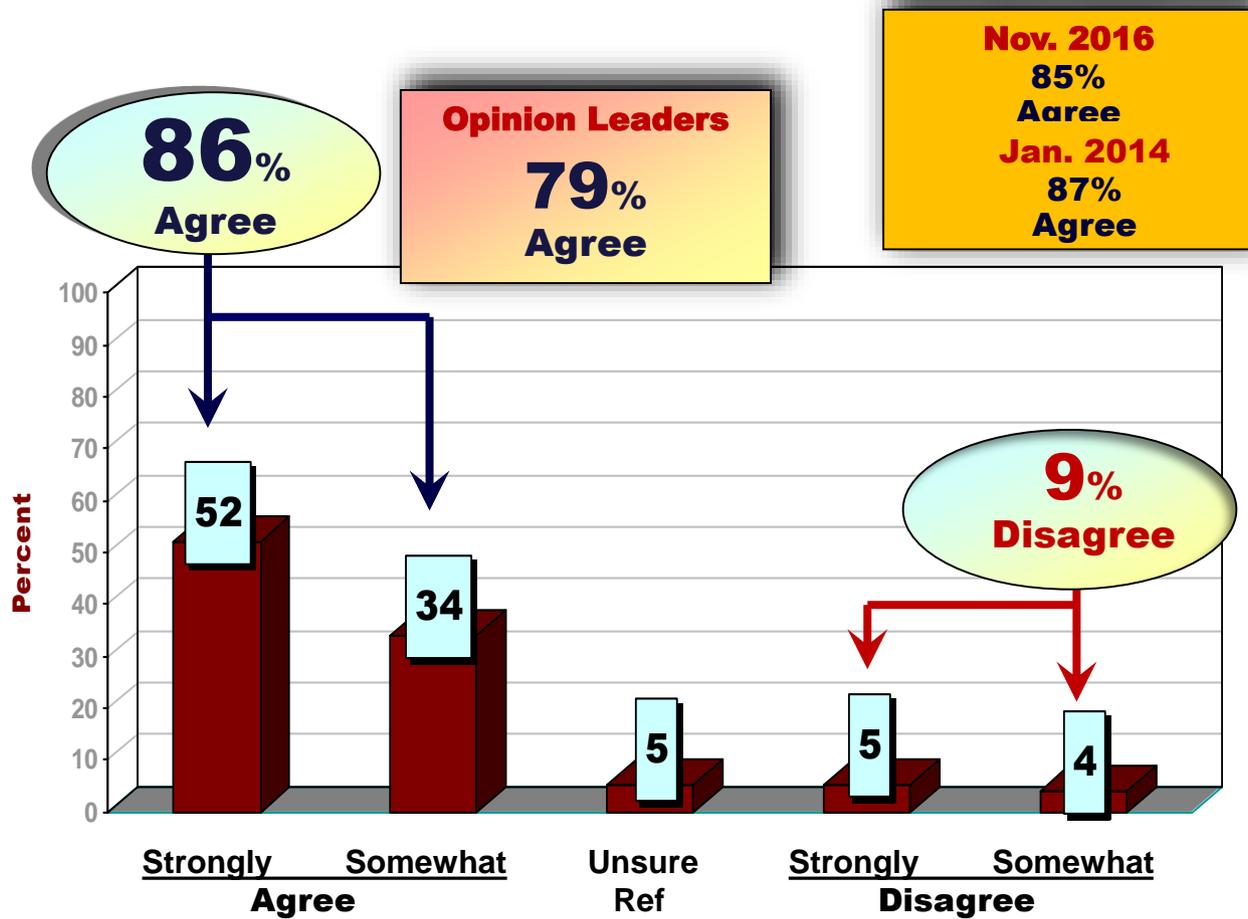
Data Collection: October 10-17, 2017



Figure 1
San Pablo Community Survey
October 2017

San Pablo is a great community... I am happy to be a resident

Question 1.1: San Pablo is a great community; I am happy to be a resident.



City Officials Should Continue...
to Turn San Pablo Into a Center for HEALTH CARE



Figure 2
 San Pablo Community Survey
 October 2017

City Officials Should Continue... to Turn San Pablo Into a Center for HEALTH CARE

Question 1.4: City officials should continue with their efforts to turn San Pablo into a center for HEALTH CARE in western Contra Costa County.

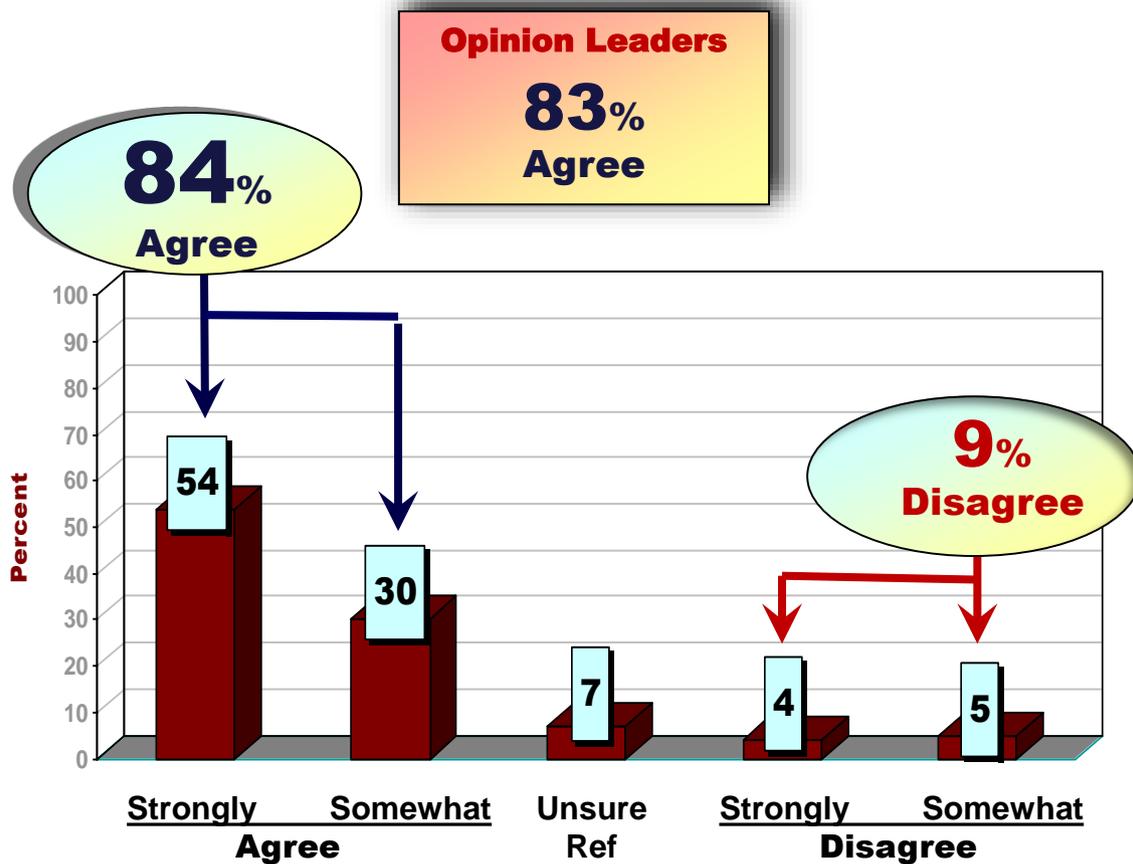
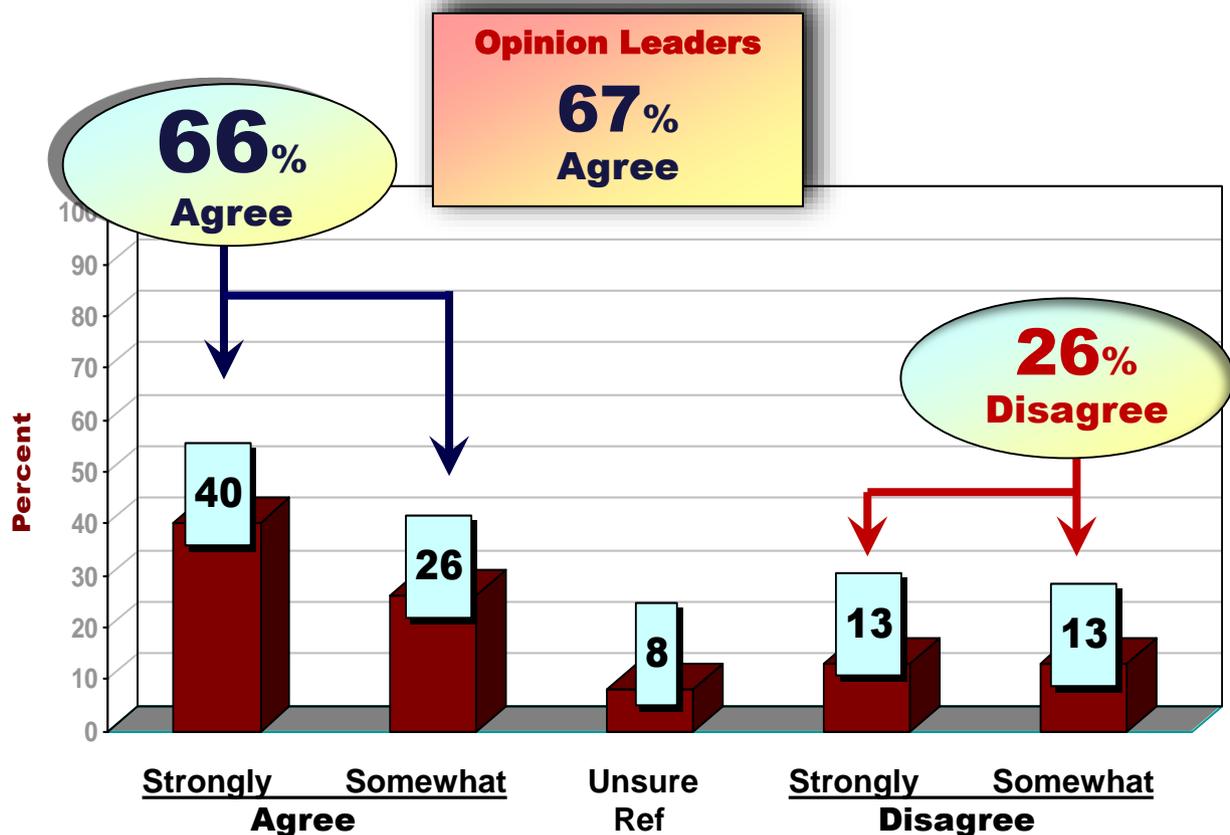


Figure 3
San Pablo Community Survey
October 2017

Taxes are Already Too High... I Would Never Vote for a Tax Increase

Question 1.3: Taxes are already too high. I would never vote for a tax increase.



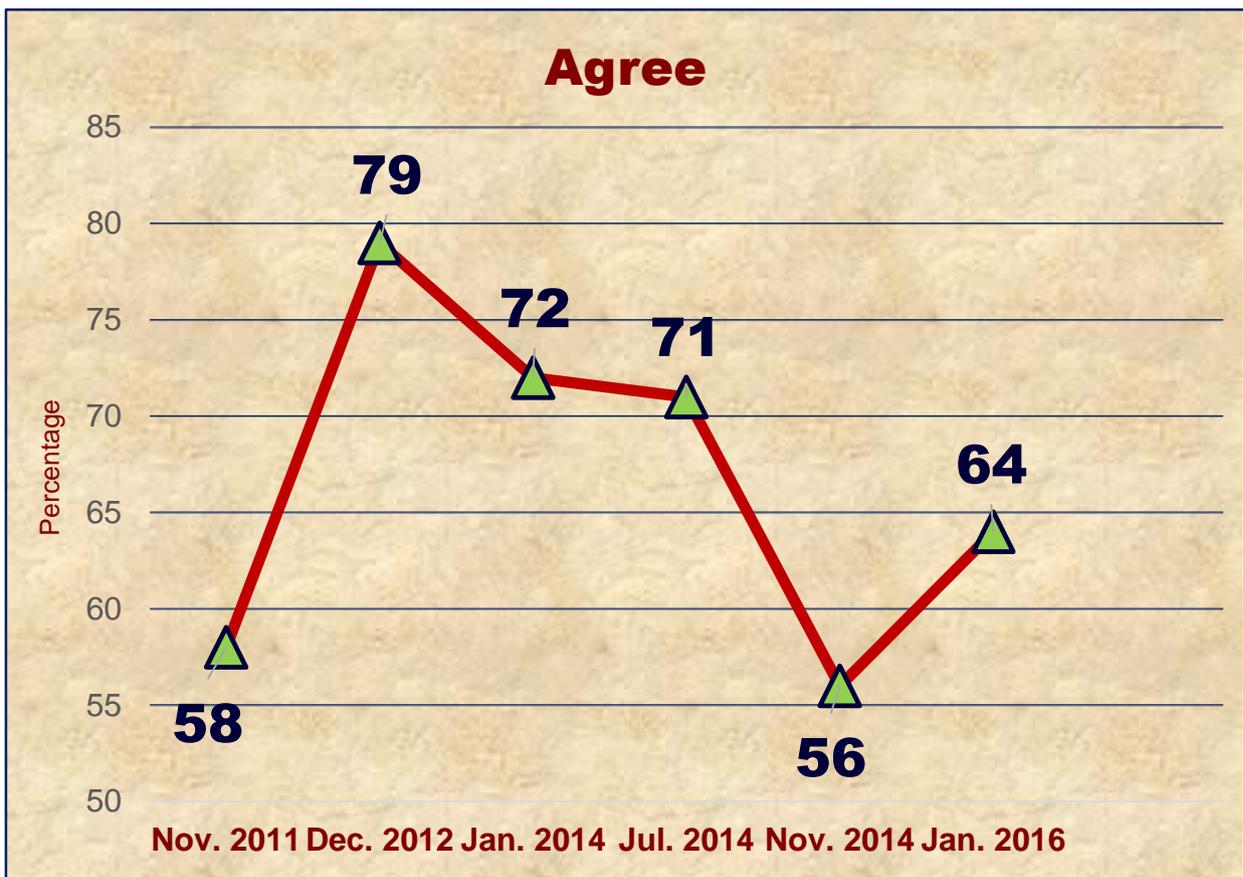
Childhood Obesity Epidemic...

The City Needs to Address this Issue



Figure 4A
San Pablo Community Survey
October 2017

Childhood Obesity Epidemic... The City Needs to Address this Issue

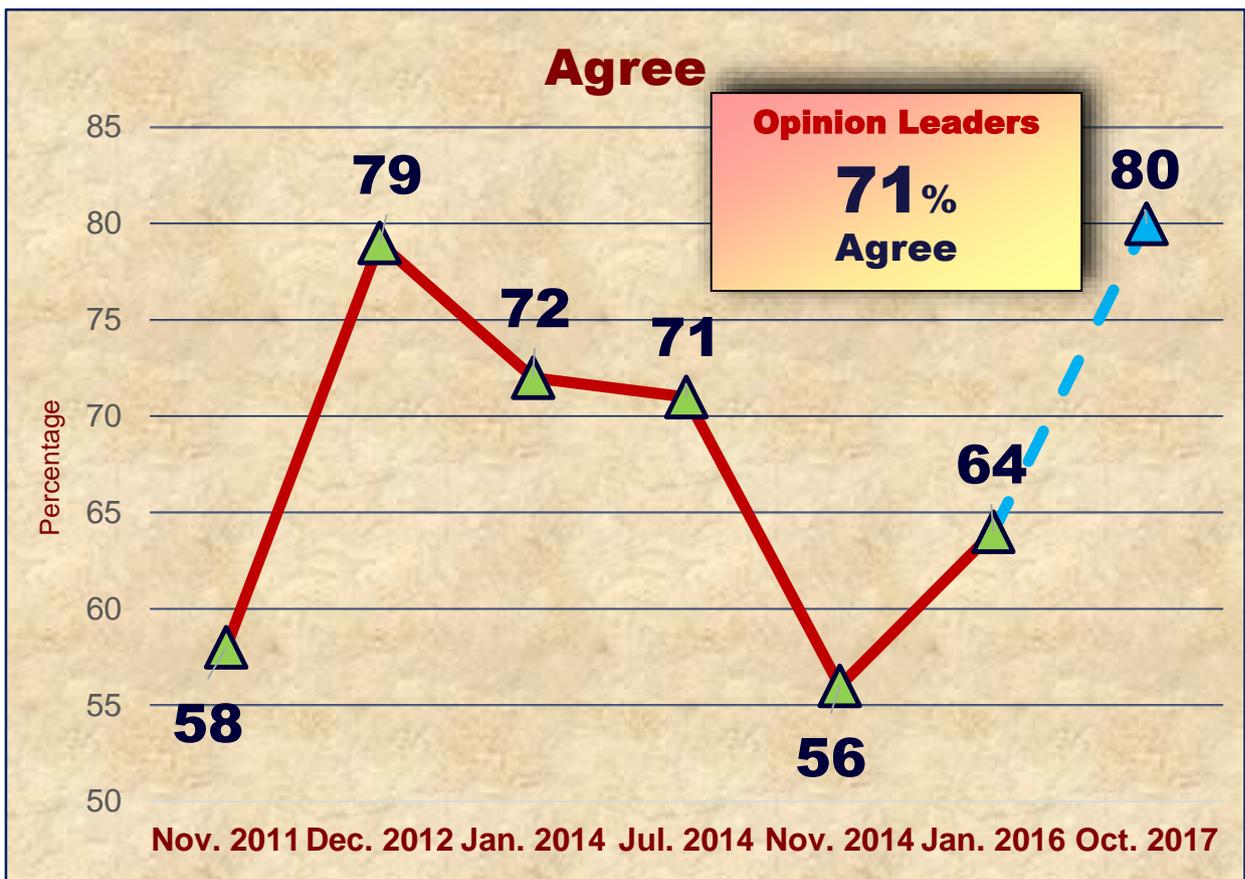


 ...the City needs to do everything possible to address this epidemic



Figure 4B
San Pablo Community Survey
October 2017

Childhood Obesity Epidemic... The City Needs to Address this Issue



 ...the City needs to do everything possible to address this epidemic

 Wants City to address childhood obesity, BUT without a new tax



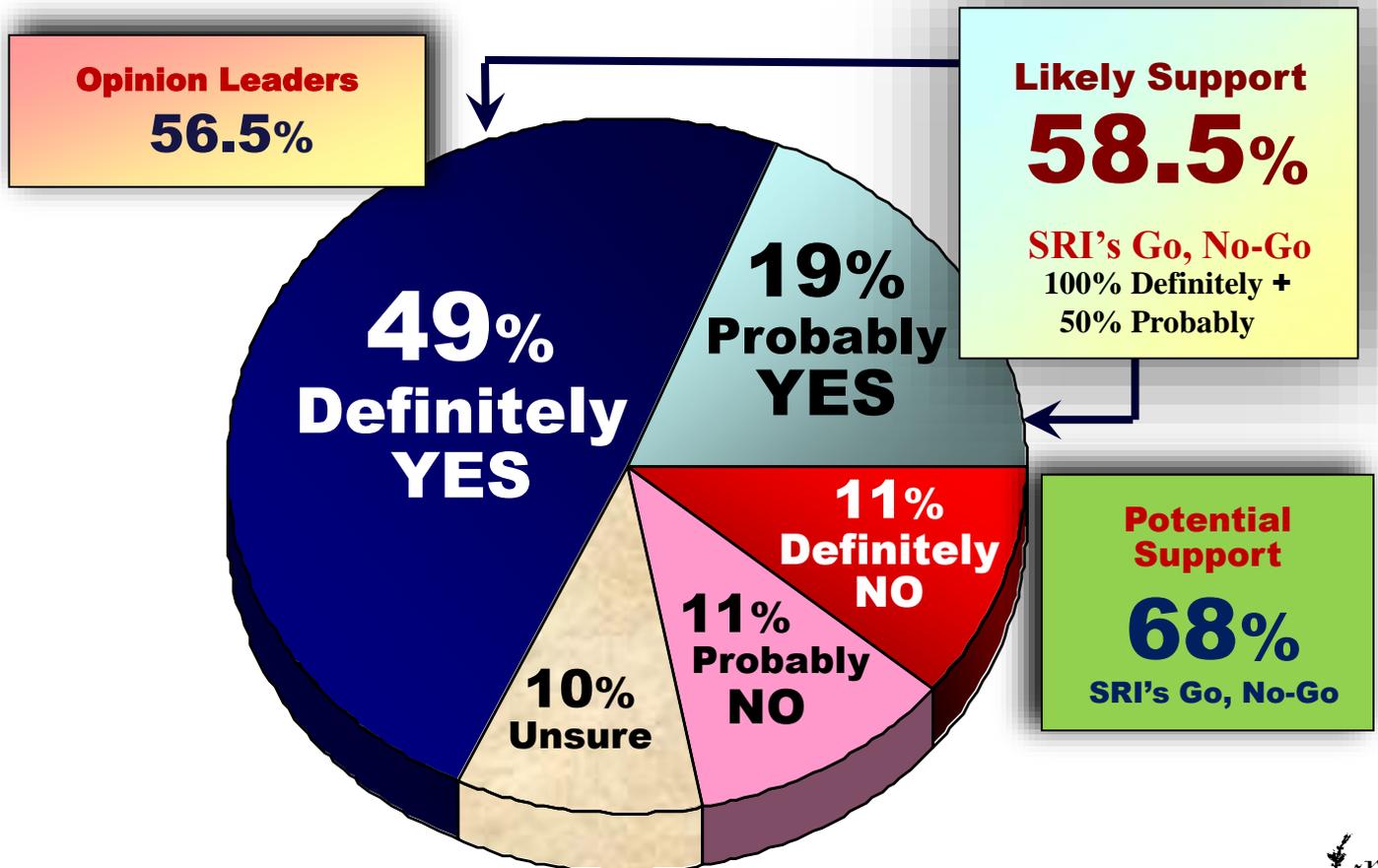
Voter Support for Renewal of Measure Q



Figure 5
San Pablo Community Survey
October 2017

Voter Support for Renewal of Measure Q

Question 12.1: In order to ensure on-going public safety (in particular, gang prevention in San Pablo), job training for San Pablo residents in search of gainful employment, and other youth programs to deter San Pablo youth from at-risk behaviors presently being funded through these monies, would you vote YES or NO on a Measure placed on the local ballot, asking San Pablo voters to keep this sales tax in place? To be clear, the renewed funding Measure would begin with a half-cent sales tax that would remain in place for five years (until 2027); then be cut in half to a quarter-cent for the next five years (until 2032); then terminate, altogether. Would you vote YES or NO on such a Measure?



Community Interest in...
Municipal Broadband
for San Pablo



Figure 6A
San Pablo Community Survey
October 2017

Have You Heard of... Fiber Optics or Municipal Broadband?

Question 2.1 Before this telephone interview, had you heard of fiber optics or Municipal Broadband?

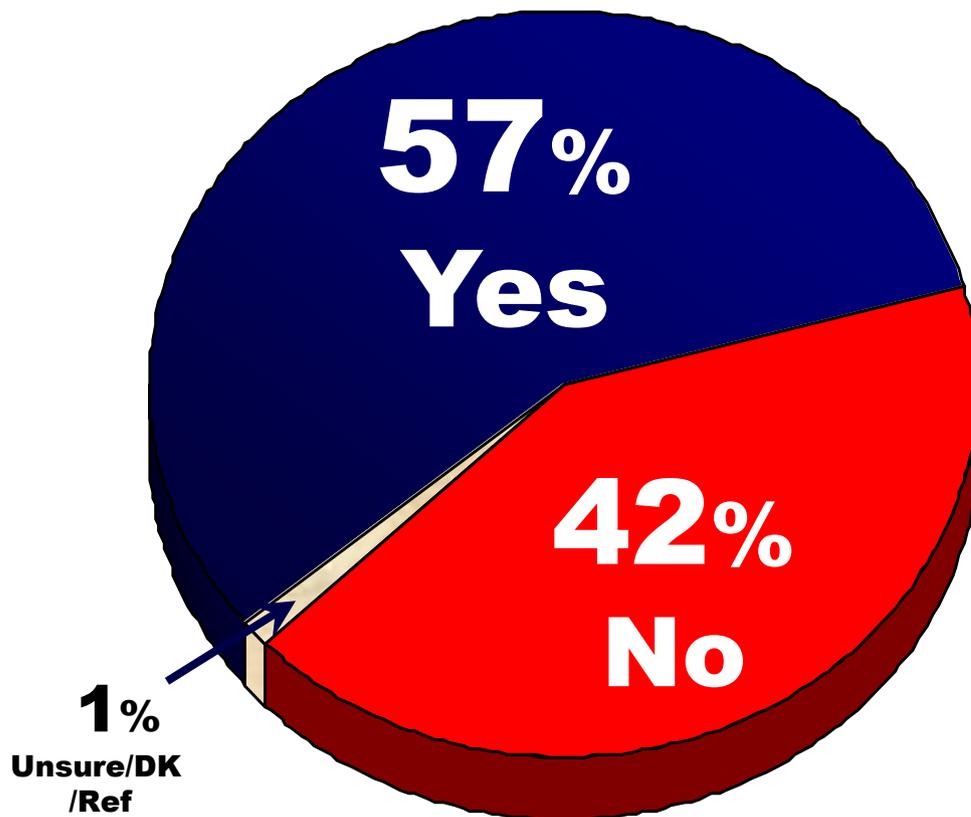


Figure 6B
San Pablo Community Survey
October 2017

Willing to **SWITCH** to City-Owned Fiber Optics Network **BEFORE** Hearing Benefits

Question 2.2: Based upon the description I just gave you of a City-owned Municipal Broadband (fiber optics) network, how likely is it that you will **SWITCH** from your present provider of Internet services (including your television, Internet and perhaps telephone), specifically Comcast Cable or AT&T, when it is made available to you through the City of San Pablo?

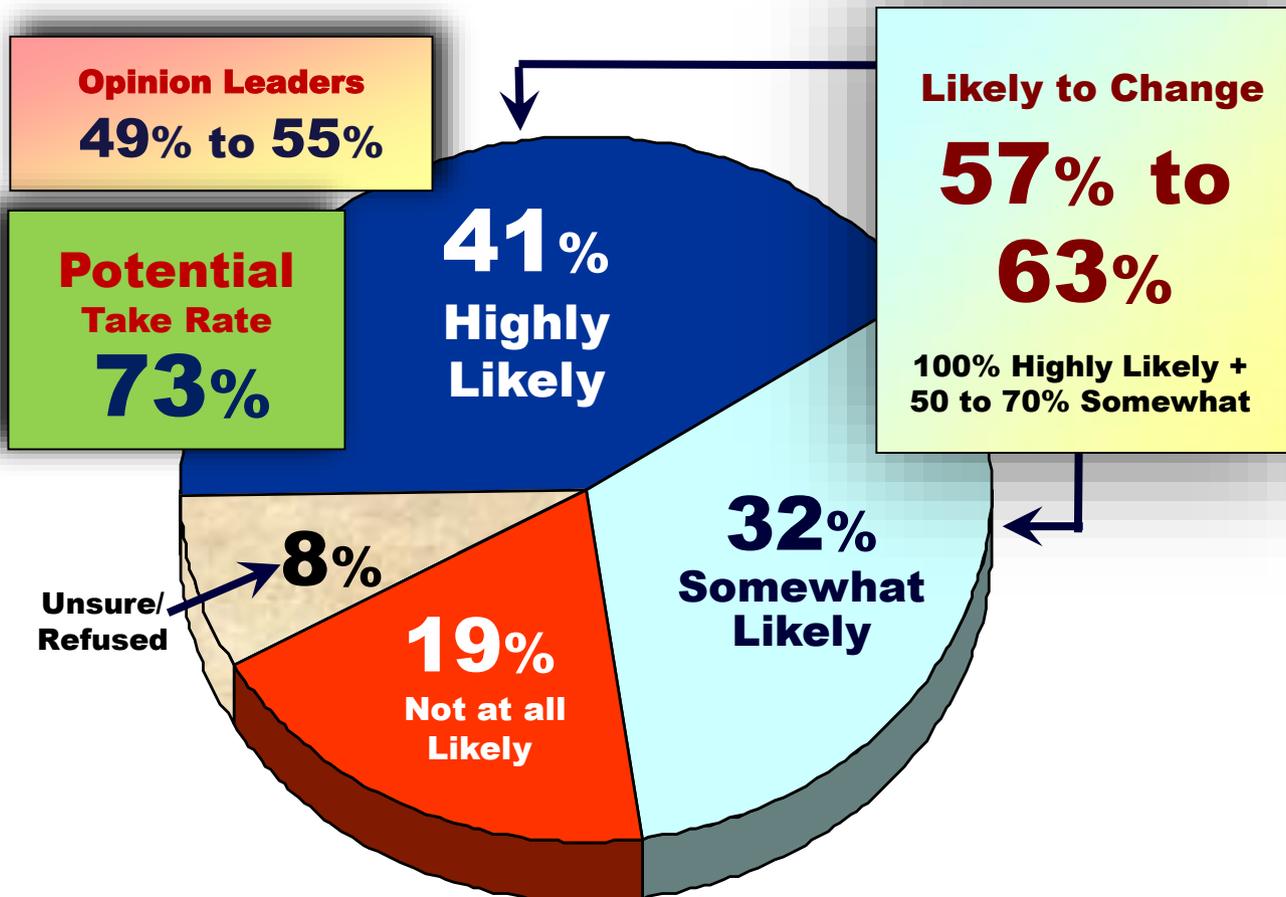


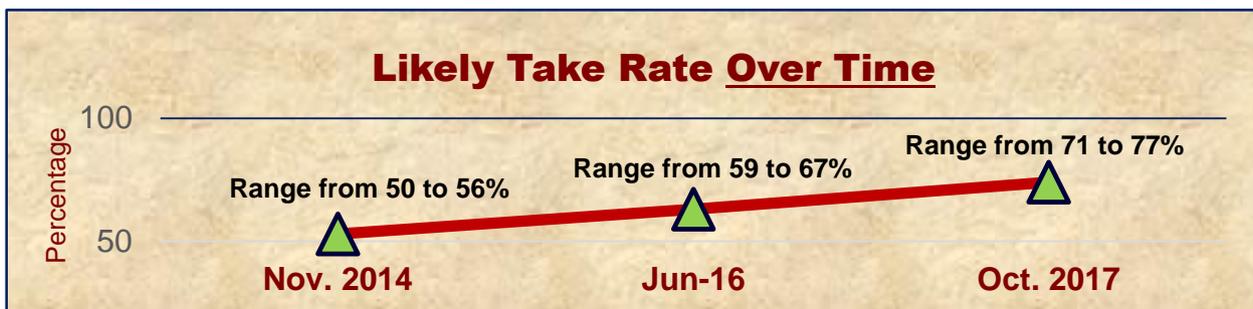
Figure 6C
 San Pablo Community Survey
 October 2017

Willing to **SWITCH** to City-Owned Fiber Optics Network **AFTER** Hearing Benefits

Question 7.0: Assuming the **total cost of these services are less** than you are currently paying today for the telecommunication services you presently have — and assuming this fiber optics network provides you with the benefits that you have identified as being important in terms of your own preferences and lifestyle — how likely is it that you would switch your current telecommunications services, including your Telephone, Television, and Internet, from Comcast Cable or AT&T to the City-owned Municipal Broadband Network?

7.0 Likely Take Rate Today

Minimum Take Rate	Likely Take Rate	Potential Take Rate
56%	71% to 77%	86%
100% of Highly Likely To Switch	100% of Highly Likely Plus 50% to 70% of Somewhat Likely to Switch	100% of Highly Likely Plus 100% of Somewhat Likely to Switch



What **Priority Should be Placed on the
City's Efforts to **Create** a
Municipal Broadband Network?**



Figure 7A
San Pablo Community Survey
October 2017

What **Priority** Should be Placed on the City's Efforts to **Create** a Municipal Broadband Network?

Question 8.1: What priority should the City's efforts to create a Municipal Broadband Network be considered?

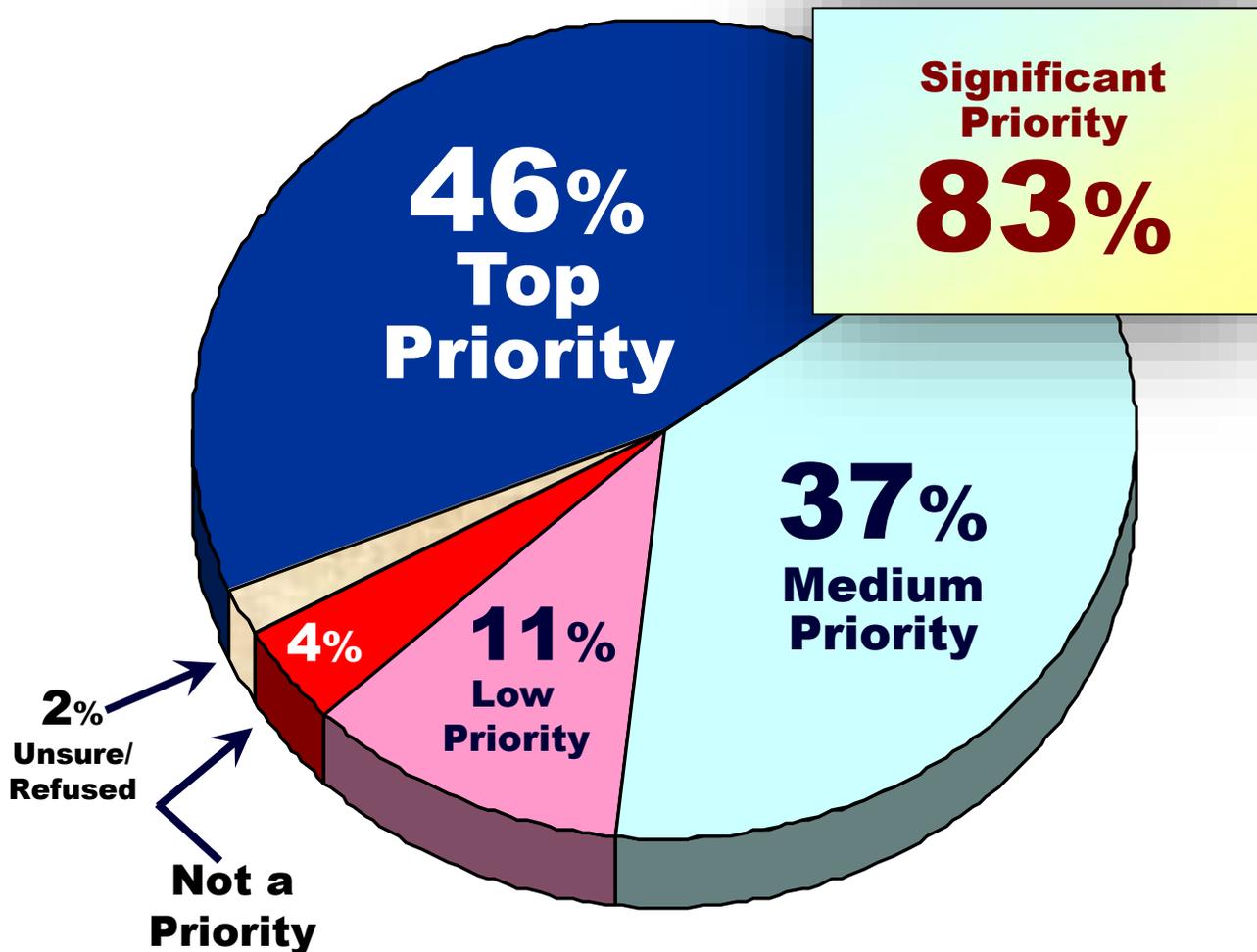


Figure 7B
San Pablo Community Survey
October 2017

Do You Presently Have... Internet Service in Your Home?

Question 3.1 Do you presently have Internet service in your home?

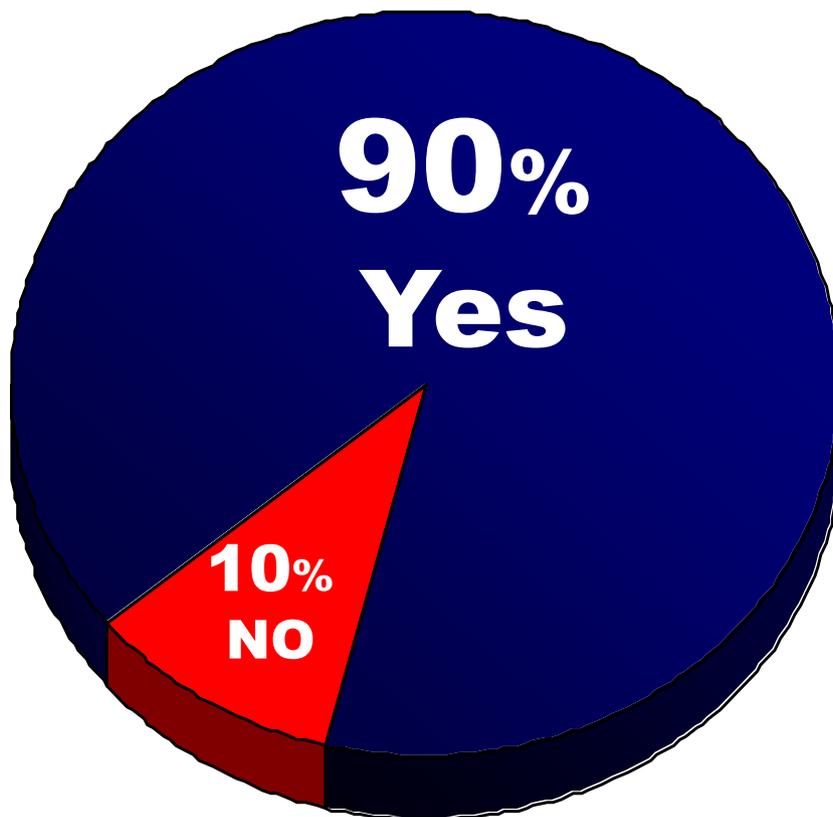


Figure 7C
San Pablo Community Survey
October 2017

Who Is Your... Current Service Provider?

Question 3.2: Who is your service provider, today, for your telecommunications services; in particular for your television and Internet?

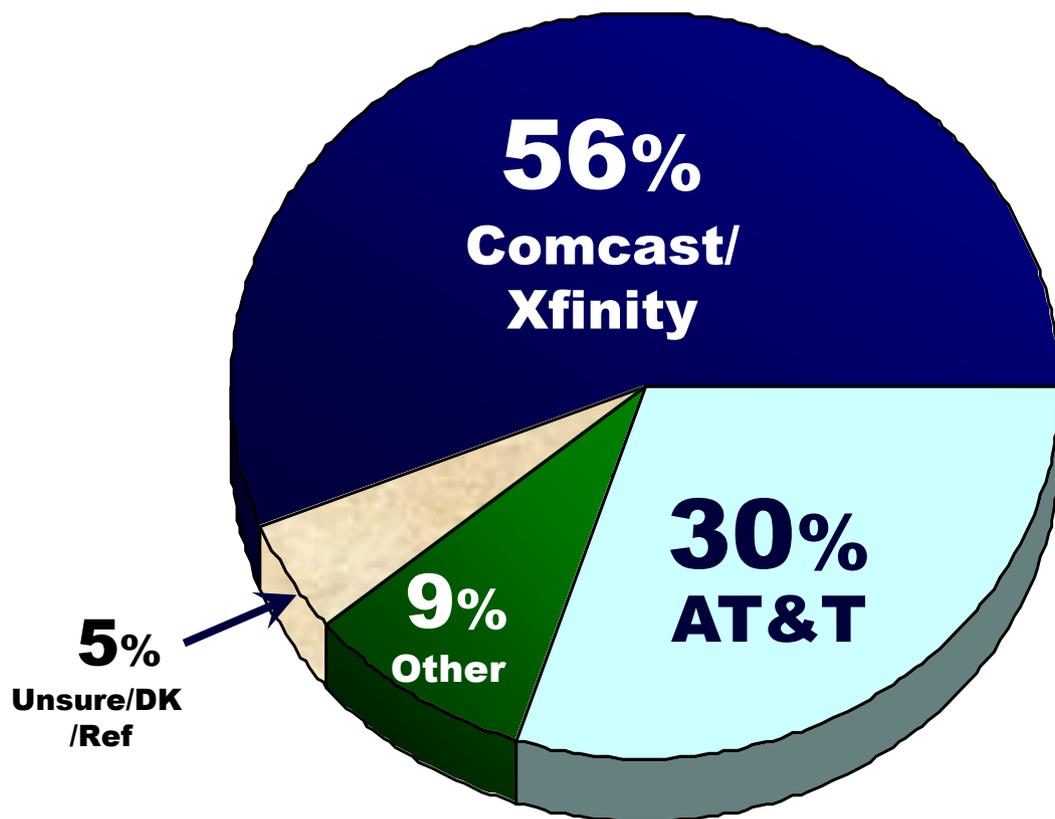


Figure 7D
San Pablo Community Survey
October 2017

How Much Do You Pay Per Month for Telecommunication Services?

Question 3.3: Approximately how much do you pay per month for your telecommunication services ?

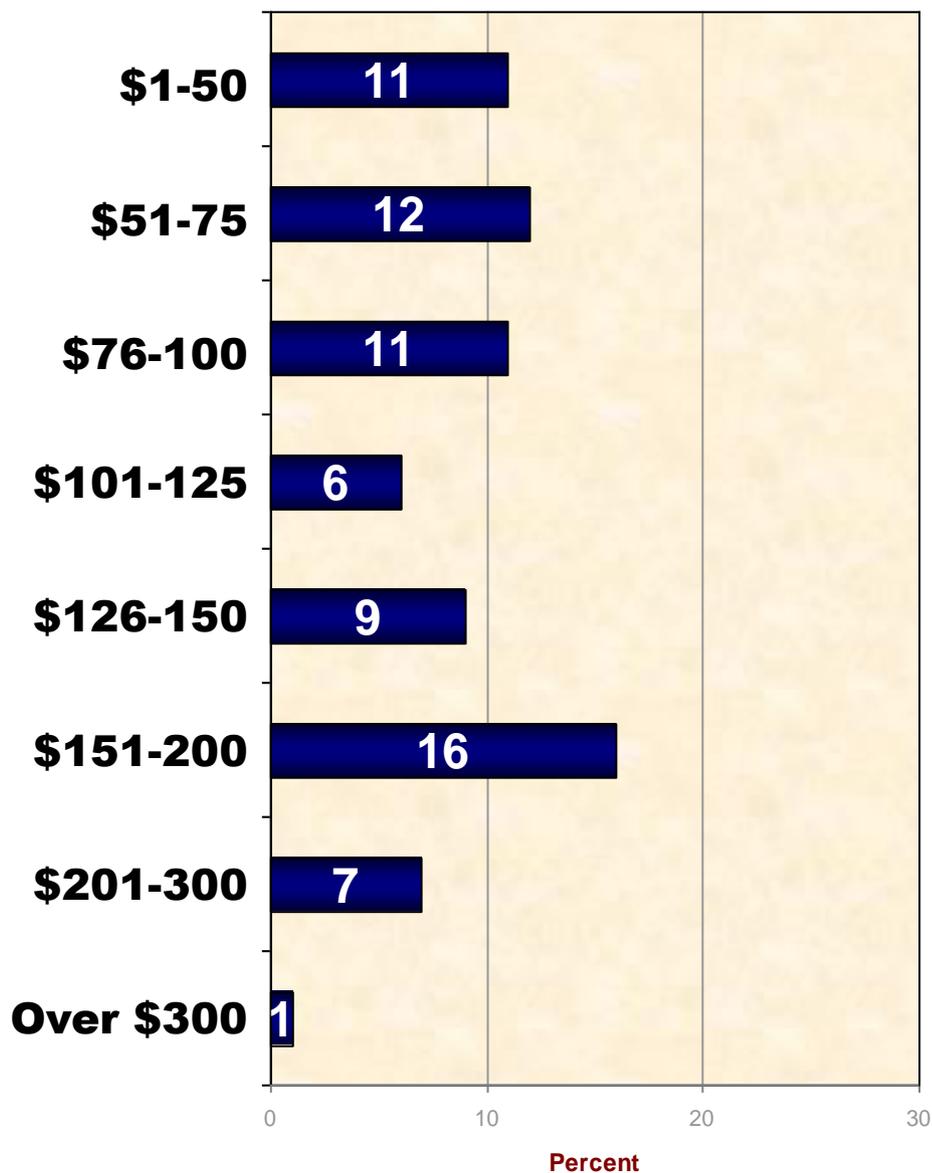


Figure 7E
San Pablo Community Survey
October 2017

Satisfaction with... **Current Service Provider** for Triple Play

Question 3.4: How satisfied are you with the service provider you presently have for your telephone, television, and internet services?

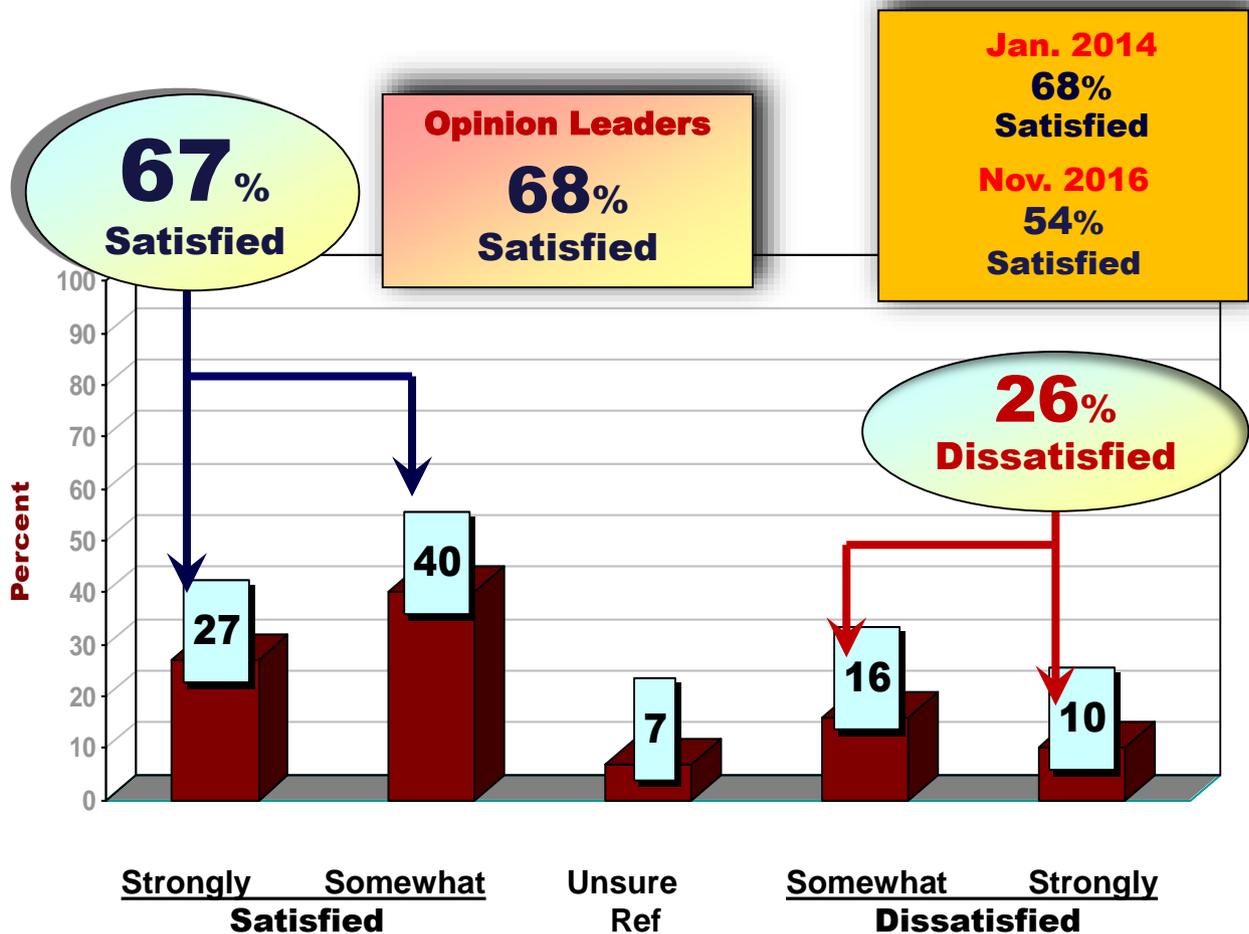


Figure 7F
San Pablo Community Survey
October 2017

Do You Presently ... Own a Smartphone?

Question 3.5 Do you presently own a SmartPhone?



Figure 7G
San Pablo Community Survey
October 2017

Do You Have a... Landline or Do You **Rely Solely** on Your Cell Phone?

Question 3.6 Do you have a land-line in your home for your telephone service or do you rely solely on your cell phone?

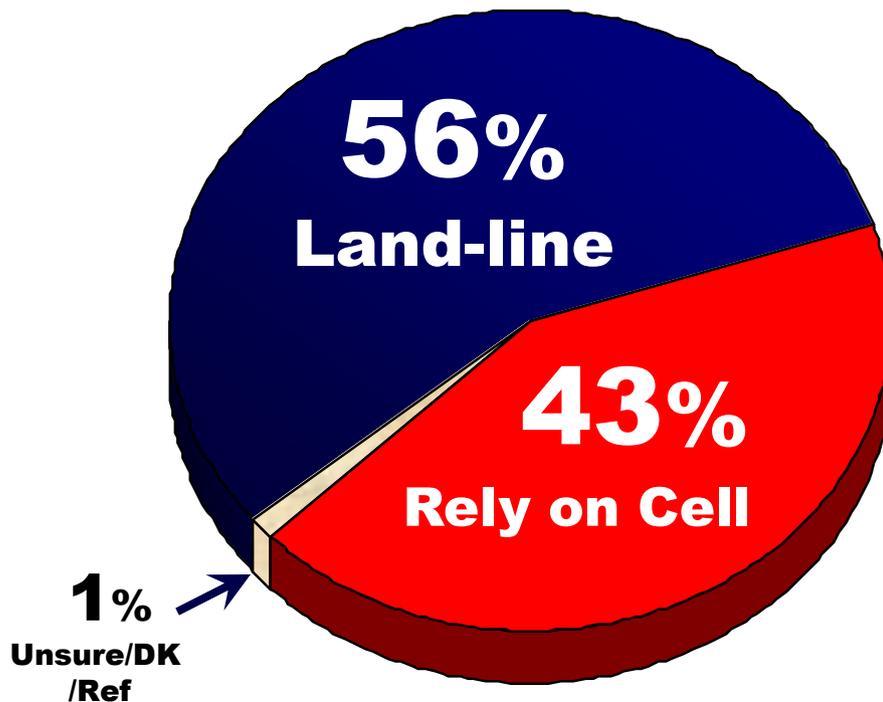


Figure 7H
San Pablo Community Survey
October 2017

Priority of Features for Fiber Optic Network

Question 5 series: I will read a list of possible features of having a fiber optic network in San Pablo. I will ask how important each feature would be to you when considering whether or not to switch from your current provider (such as Comcast Cable or AT&T) to a City-owned and operated fiber optic network.

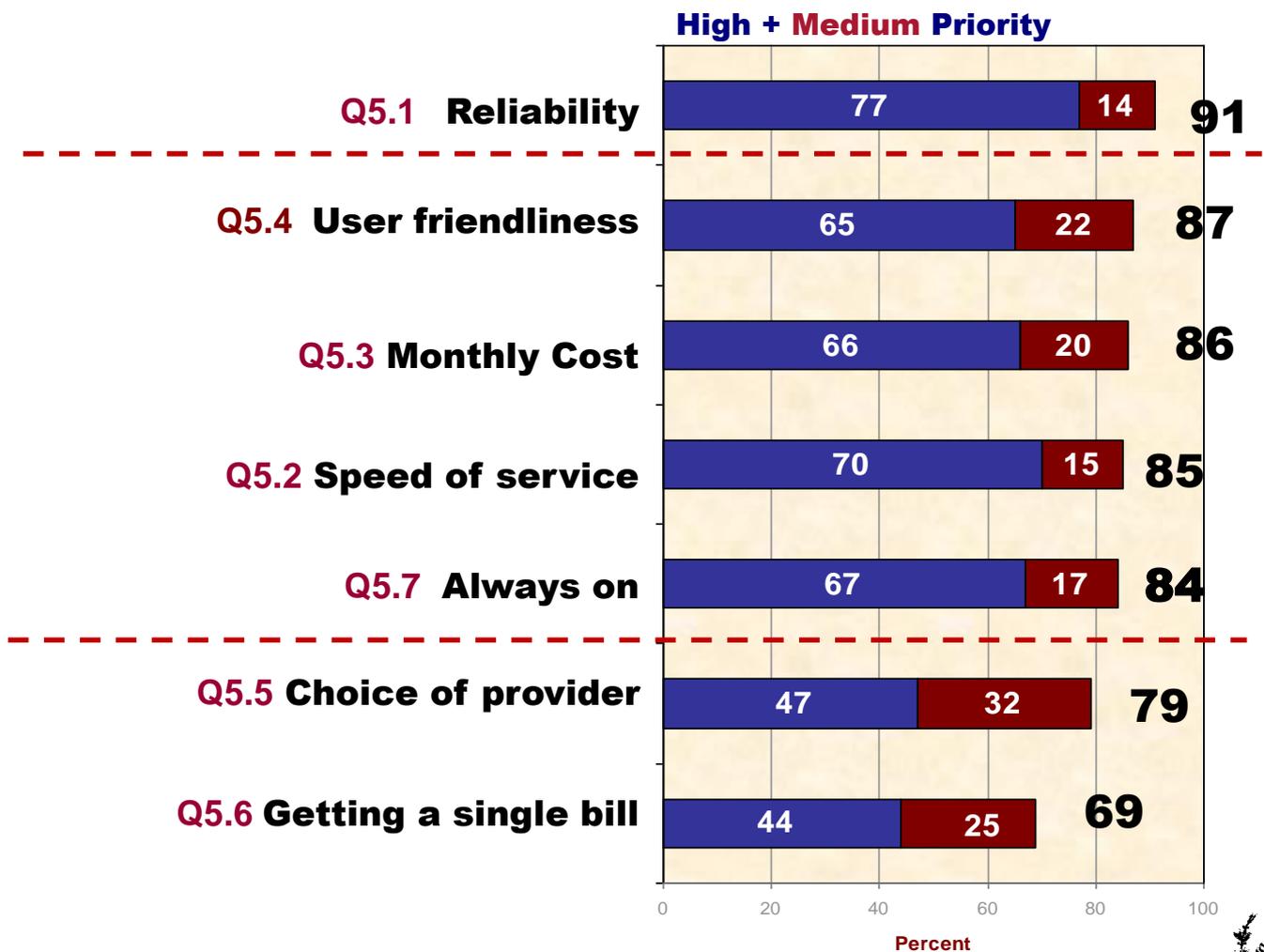
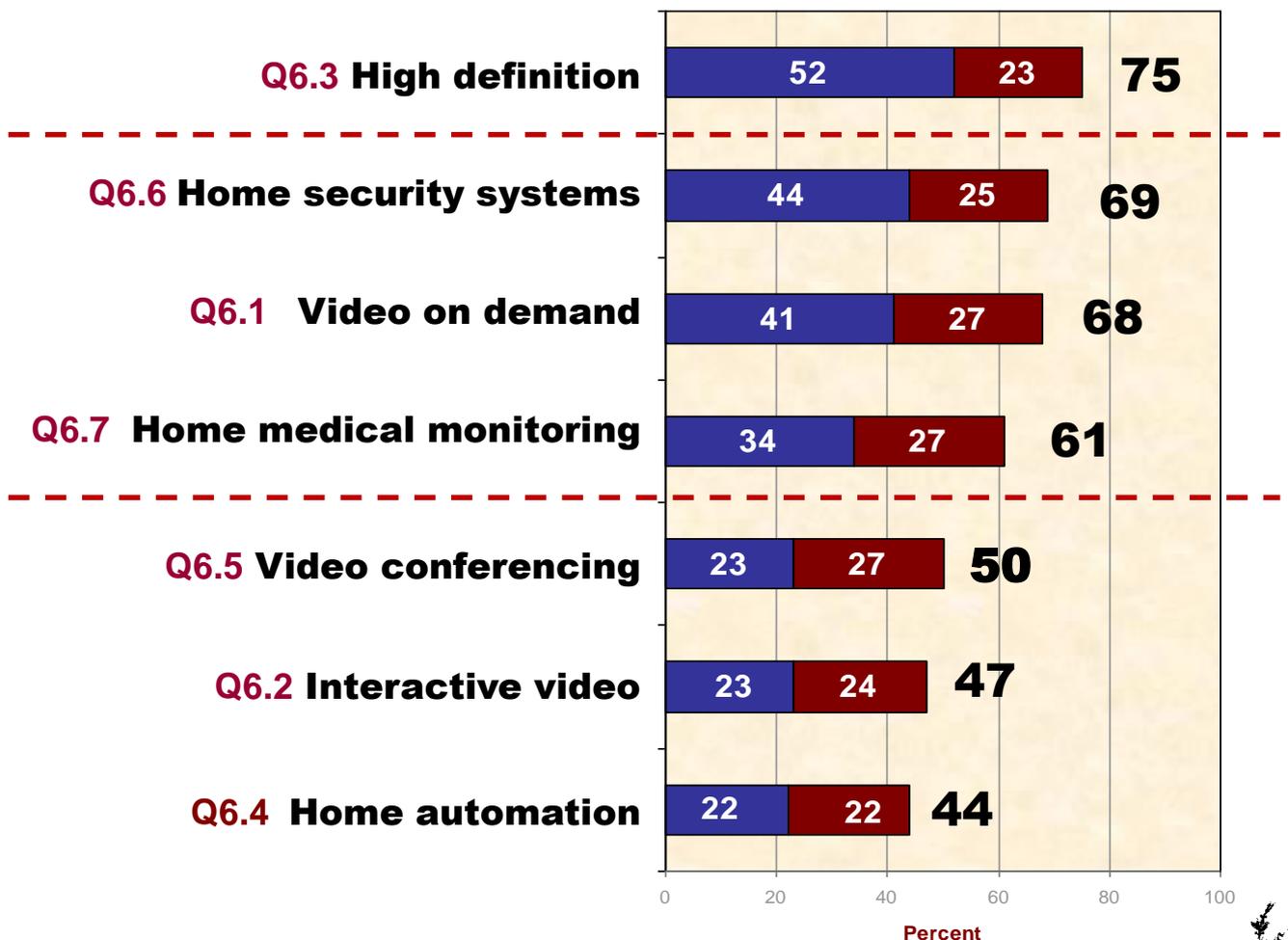


Figure 71
 San Pablo Community Survey
 October 2017

Priority of **Benefits/Features** for Municipal Broadband Network

Question 6 series: Using the same scale as the Q5 series I will ask how important specific benefits/features would be to you when considering whether or not to switch from your current provider (such as Comcast Cable or AT&T) to a City-owned and operated fiber optic network.

High + Medium Priority



Drivers of Adoption

of City-owned Municipal Broadband Network

Price Sensitivity



Figure 8A
San Pablo Community Survey
October 2017

A Closer Look at Likely 'Take Rate'

REMINDER of Benchmark BEFORE Learning of PRICE

Question 7.0: Assuming the total cost of these services are less than you are currently paying today for the telecommunication services you presently have — and assuming this fiber optics network provides you with the benefits that you have identified as being important in terms of your own preferences and lifestyle — how likely is it that you would switch your current telecommunications services, including your Telephone, Television, and Internet, from Comcast Cable or AT&T to the City-owned Municipal Broadband Network?

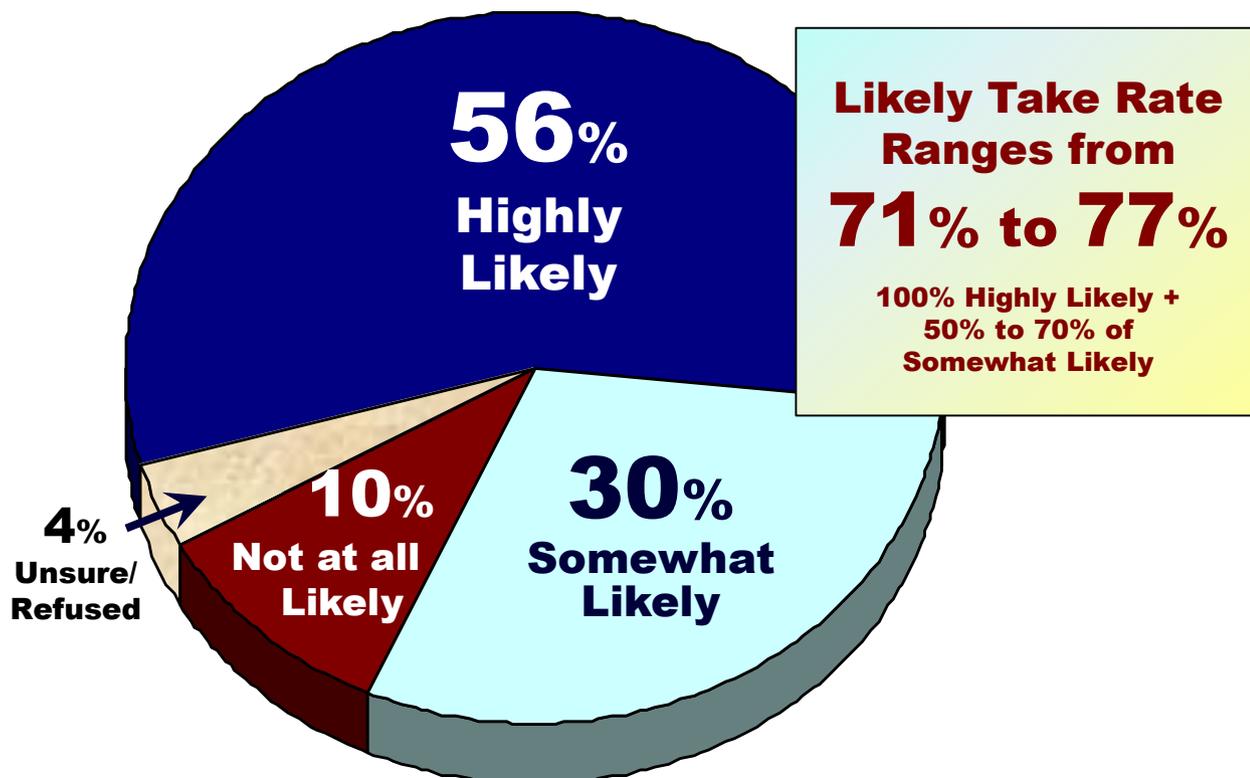


Figure 8B
San Pablo Community Survey
October 2017

Willingness to SWITCH at \$100/month

Question 7.1: If the monthly fee for what is called “triple play” (meaning for your Television, Telephone, and Internet connection) was set at \$100 per month (compared with what you are presently paying for these services) would this cause you to switch from your current provider to the City’s Municipal Broadband Network?

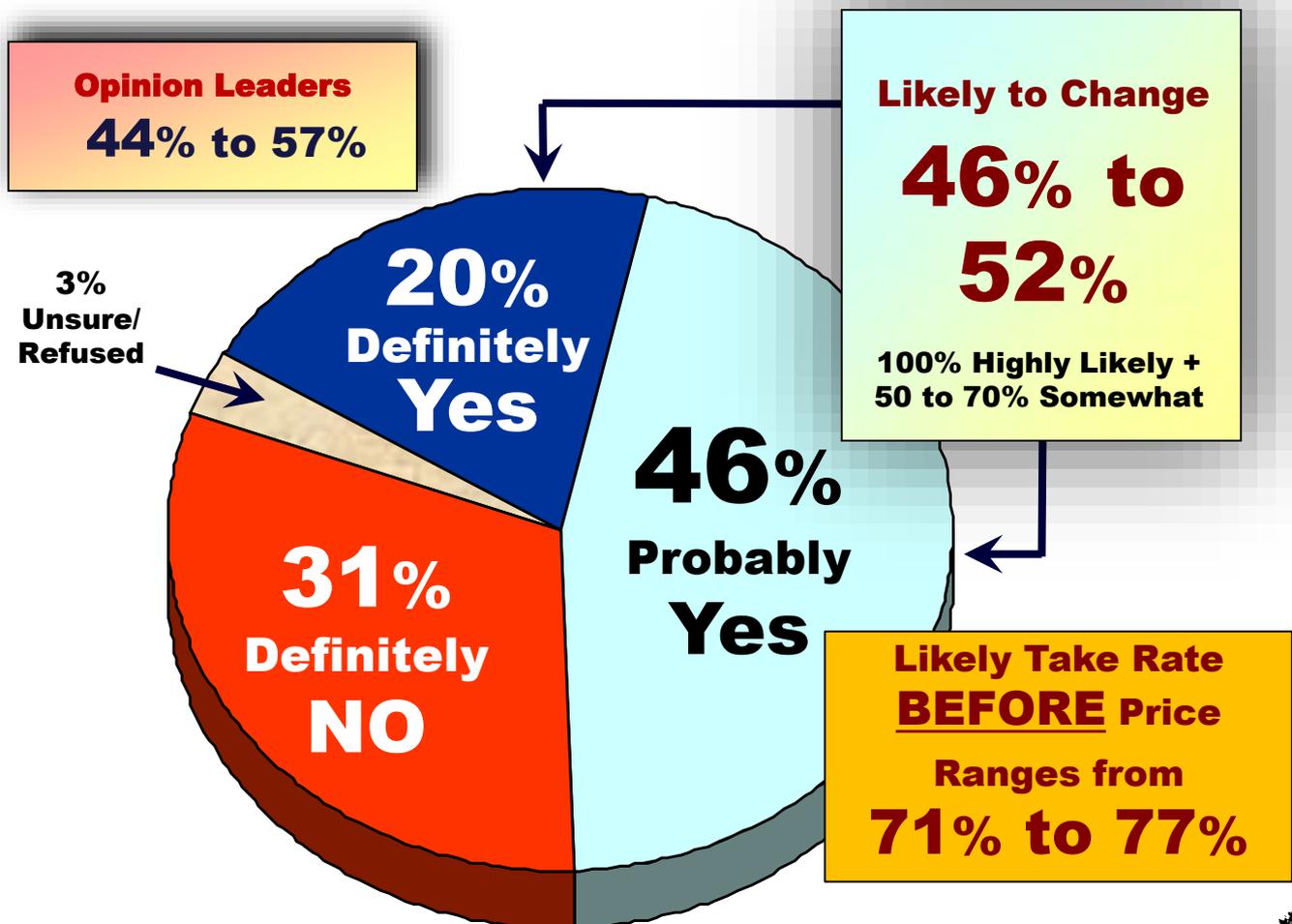
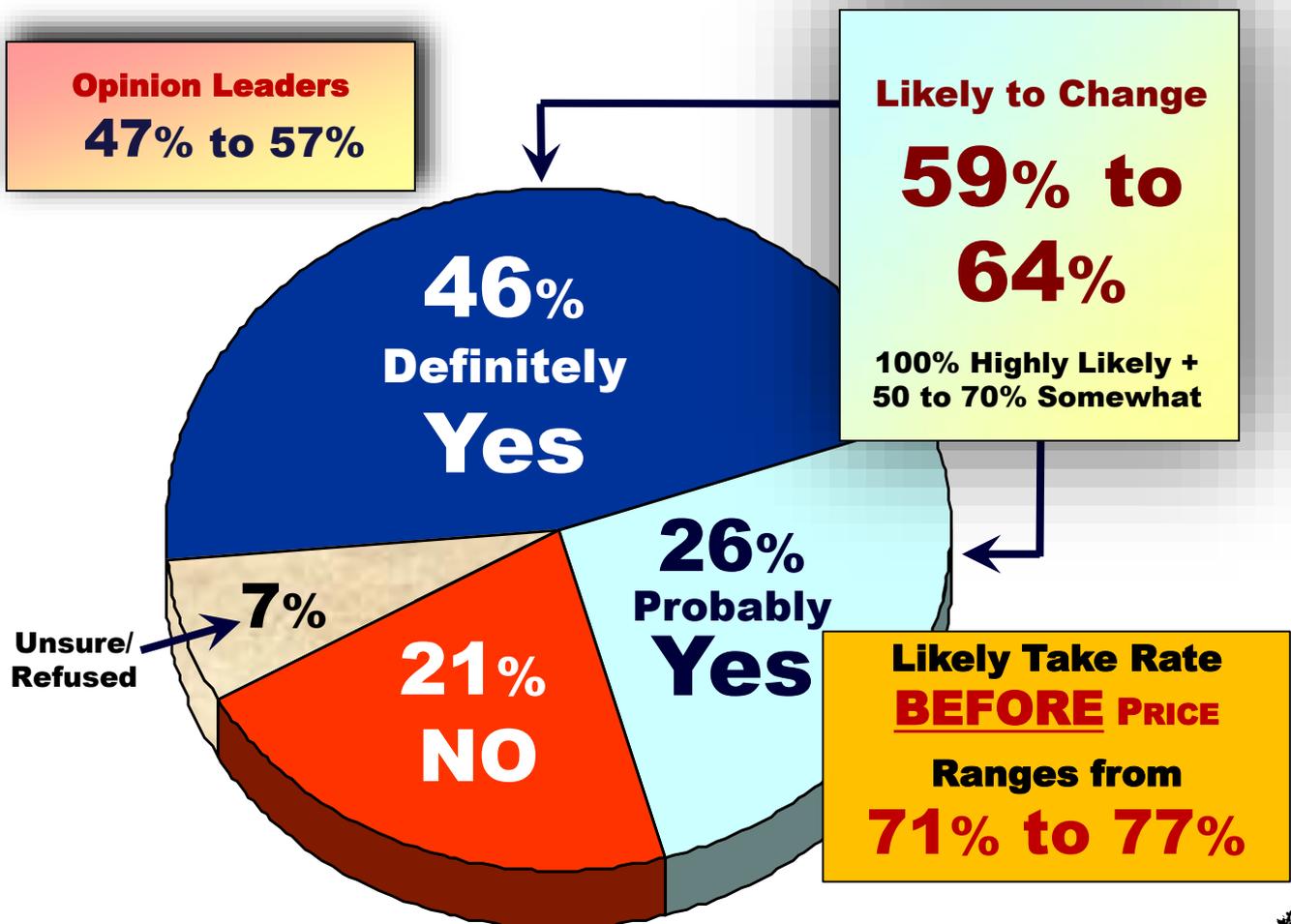


Figure 8C
San Pablo Community Survey
October 2017

Willingness to SWITCH at \$45/month

Question 7.2: If the monthly fee for “triple play” (meaning, for your television, telephone, and internet connection) was set at \$45 per month, would this cause you to switch from your current provider to the City’s Municipal Broadband Network (bringing you all of the benefits discussed a few moments ago that are delivered through fiber optics)?



**Voter *SUPPORT* for a Tax Measure to
Finance the First
3 to 5 Years of O&M**



Figure 9A
San Pablo Community Survey
October 2017

Voter **SUPPORT** for a Tax Measure to Finance the First **3 to 5 Years of O&M**

Question 8.2 If City officials were to place such a funding measure on the local ballot to generate enough money to complete the construction of a Municipal Broadband Network AND cover the total build-out costs, operations and maintenance of this fiber optics network for the first 3-5 years of operation, and assuming that the amount of the annual tax DOES NOT exceed your level of *willingness-to-pay*, would you vote YES or NO on the measure?

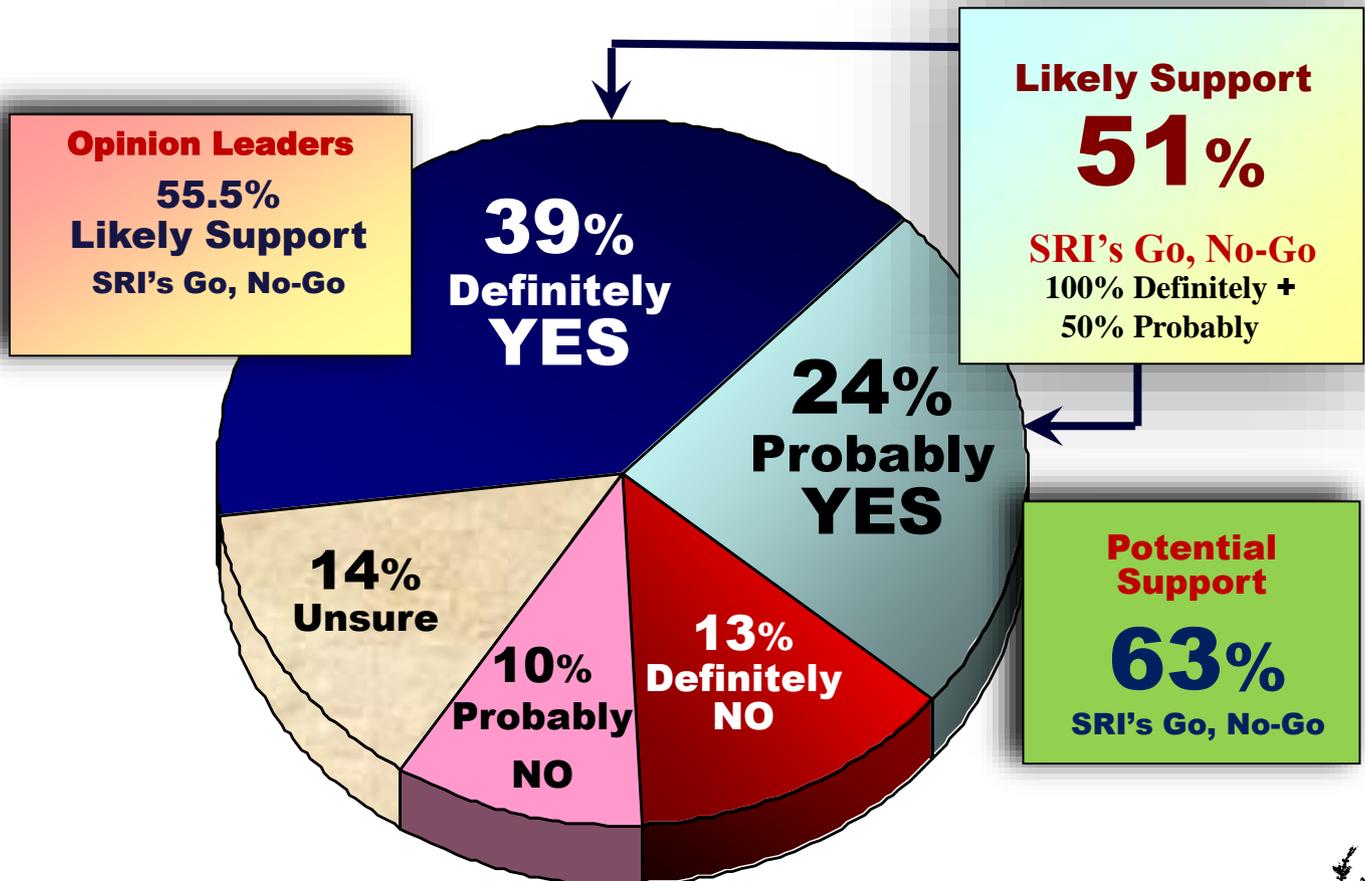
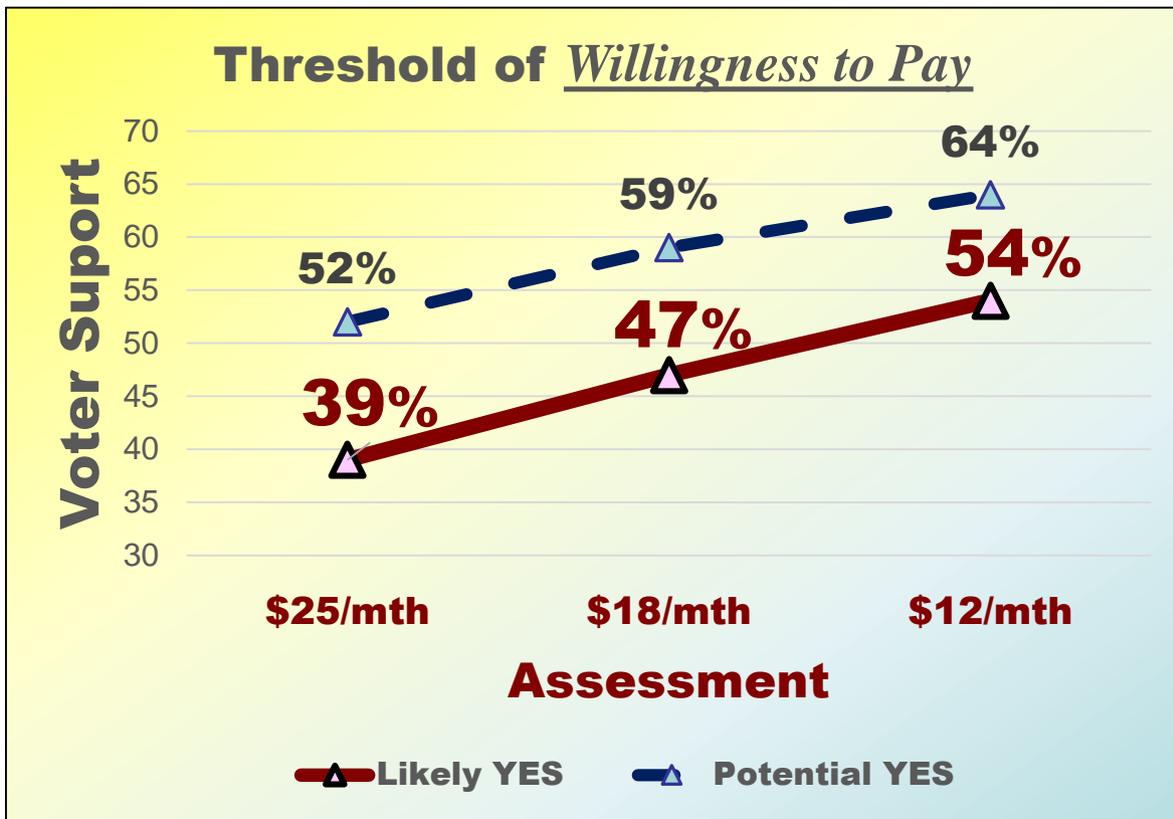


Figure 9B
San Pablo Community Survey
October 2017

THRESHOLD of *Willingness to Pay* for First 3 to 5 Years of O&M

Q9.0 Series



\$25/mth = \$300/yr
\$18/mth = \$216/yr
\$12/mth = \$144/yr



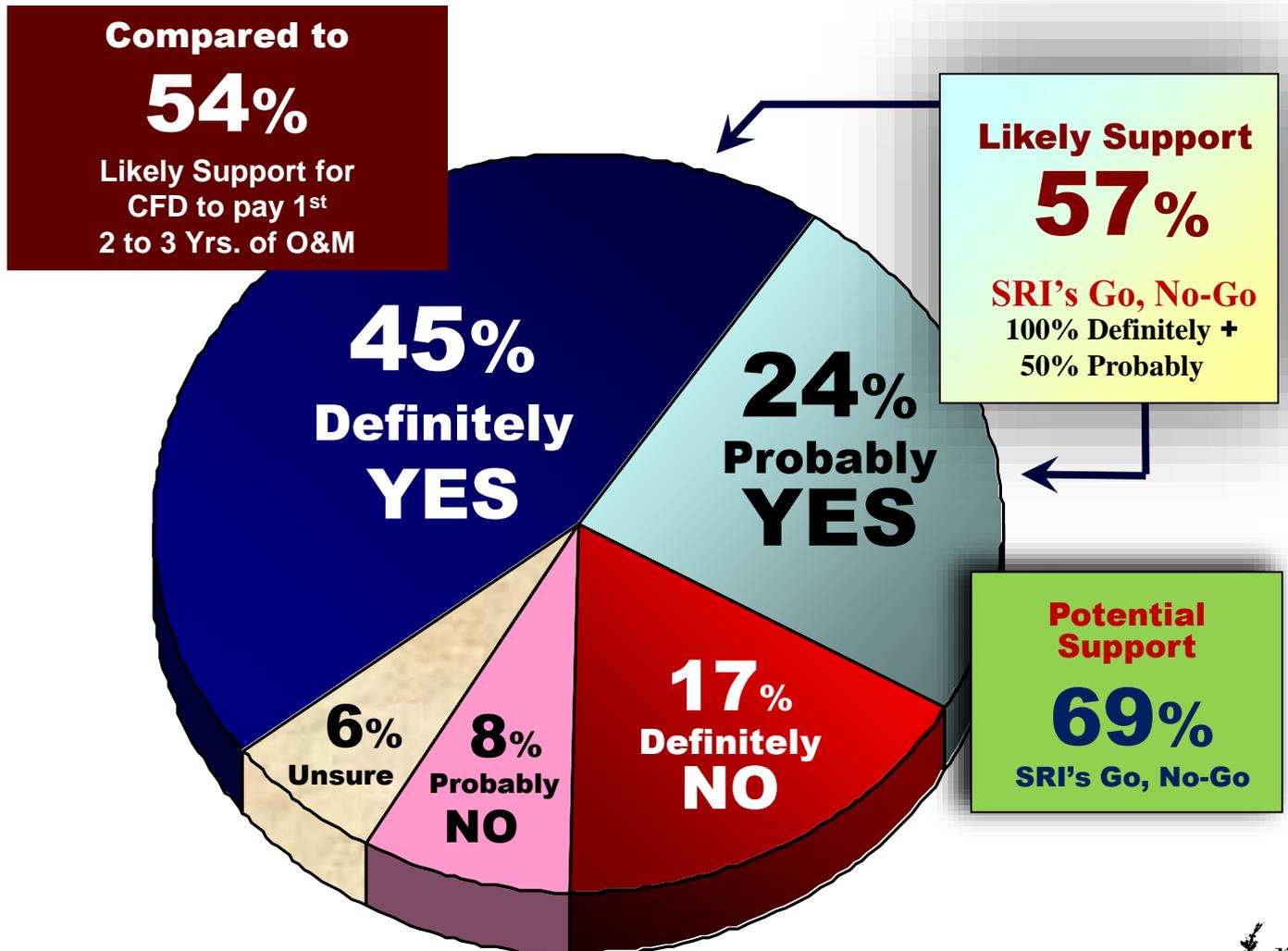
**Willing to Support a Tax Measure to
Cover the Hook-up Fee**



Figure 10
San Pablo Community Survey
October 2017

Willing to **Support** a Tax Measure to Cover the **Hook-up Fee**

Question 11.0: If this tax were limited to between \$2 and \$5 a month, for a period not to exceed five years, in order to cover the one-time \$1,500 hook-up fee, thus allowing you to switch to this state-of-the-art fiber optics network with literally **NO COST** for bringing the technology into your home...would you vote **YES** or **NO** for such funding measure?



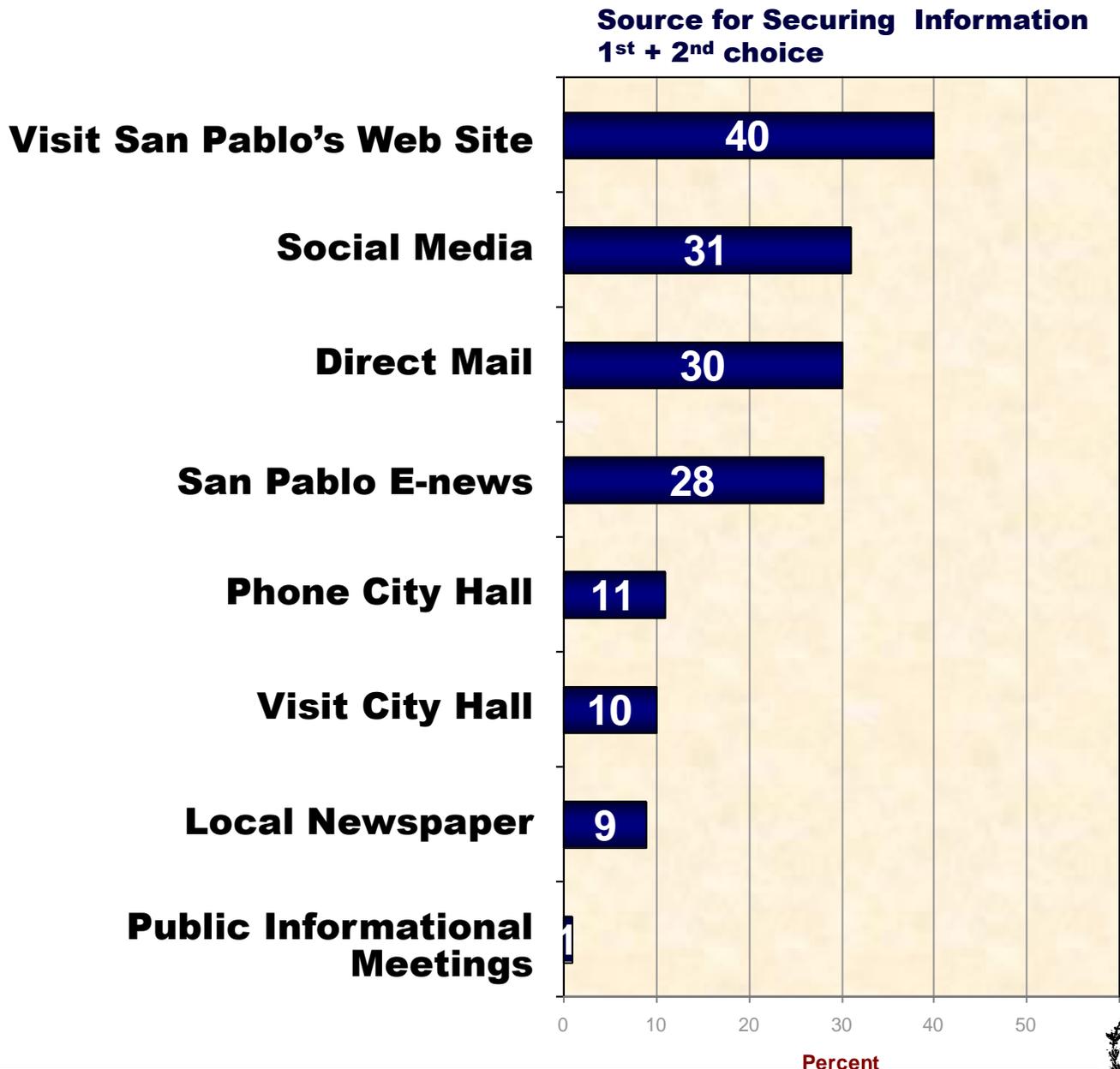
Sources of Information

Used to Secure Information about City-sponsored Activities & Programs



Figure 11
San Pablo Community Survey
October 2017

Sources of Information Used to Secure Information about City-sponsored Activities & Programs



Thank You



*We'll be pleased to
Take Questions Now*



Figure 12A
 San Pablo Community Survey
 October 2017

Demographics of Survey Respondents

Length of Residency

0 to 5 years	27%
6 to 10	17%
11 to 25	25%
Over 25 years	29%
Refused	2%

Age

18 to 30	21%
31 to 40	14%
41 to 50	14%
51 to 65	22%
Over 65 years	25%
Refused	4%

Household Income

Under \$25,000	19%
\$25,001 to \$50,000	20%
\$50,001 to \$75,000	19%
\$75,001 to \$100,000	14%
Over \$100,000	16%
Refused	12%

Ideology

Liberal	41%
Moderate	34%
Conservative	13%
Refused	12%

Home Ownership

Own	56%
Rent	41%
Refused	3%

Education

Less than High School	7%
High School/Trade School	17%
Some College	29%
College Graduate	30%
Graduate/Prof. School	14%
Refused	3%

Ethnicity

Caucasian	37%
Hispanic/Latino	21%
African American/Black	19%
Native American/Alaskan	0%
Native Hawaiian & other Pacific Islander	1%
Asian	9%
Other	7%
Refused	6%

Gender

Male	43%
Female	57%



Figure 12B
San Pablo Community Survey
October 2017

Demographics of Survey Respondents

School Aged Children

None	63%
One	20%
Two	9%
Three or more	5%
Refused	3%

Area of Residence

East I80/San Pablo Hills	21%
Old Town	14%
N San Pablo, Leroy Heights	
Contra Costa College	31%
West I80, Casino Hospital	
Area, City Hall	21%
Refused	13%

Registered to Vote

Yes	91%
No	17%
Refused	2%

Party ID

Democrat	59%
Republican	9%
Independent	13%
Other	13%
Refused	6%

