

Touchstone Energy®

Member Perspectives Report Broadband Internet Services Q1 2026



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Study Overview

Member Perspectives Methodology Overview

- Survey results were collected from 03/16/2026 through 04/02/2026.
- A total of 4 cooperatives participated in the Q1 study on cooperative-provided broadband internet services.
- To collect survey responses, a screener survey was first sent to determine eligibility. Eligible participants had to be at least 18 years old, received broadband internet service from the cooperative for at least 3 months, and were not employed by the cooperative or had immediate family employed by the cooperative. From the screener survey, email invitations were sent to 55 participants from each cooperative by CFI Group for the full survey. Reminder emails and additional emails were later sent to increase response rate. Respondents to the full survey received a \$20 prepaid card as an incentive for participation.
- A total of 143 responses were collected as follows:
 - Continental Divide Electric Cooperative: 33
 - Coos-Curry Electric Cooperative, Inc.: 44
 - Maquoketa Valley Electric Cooperative: 27
 - Otsego Electric Cooperative, Inc.: 39



Key Findings

Key Findings

- Members report high satisfaction with the internet service provided by their local cooperatives, with 76% saying they are very satisfied.
- Contributing to their satisfaction, 84% of members say their internet service is very reliable, 47% consider the service very affordable, and 81% are very satisfied with customer service. Moreover, 45% consider their internet service extremely valuable.
- According to 94% of members, the internet speeds they are getting meet their needs (56% all of the time, 38% most of the time) and the vast majority are satisfied with the speed (76% very satisfied).
- Members feel strongly that having an ISP that is locally owned and supportive of the community is important – 36% feel it is extremely important and 41% believe it is very important.
- Nearly nine in ten (88%) members say they are likely to recommend their internet service providers (52% extremely likely and 36% very likely). Additionally, 69% say, if provided with the option to switch to another provider that offers similar pricing, they would not at all be likely to switch.
- Nearly seven in ten (69%) say that they currently have other options for broadband internet service in their home. Among the nearly nine in ten (86%) members having experience with another internet service provider, ratings of the reliability, affordability and value of their former ISP paint an unfavorable picture of their experiences, especially compared to their current provider.
- Results suggest that internet service is widely regarded as essential, with 92% of members viewing it as a utility and most saying their expectations of their internet service in terms of reliability and affordability are similar (28% extremely similar and 50% very similar) to other utilities.



Key Findings

- Streaming (92%) and social media (76%) are the most commonly cited broadband activities. Around four in ten members also report using broadband for telehealth (44%) and remote work (43%), highlighting that broadband supports both entertainment and practical day-to-day needs.
- More than one-third of members express interest in broadband education and about the same percentage are undecided; members prefer email as the best way to share digital literacy tips.
- Members report widespread concern over online security and privacy (41% extremely concerned, 31% very concerned), likely driven in part by the fact that 22% have experienced security issues that made them reconsider internet usage. Relatedly, a majority of members (61%) say cybersecurity best practices would be extremely or very valuable.
- In comments on the discussion board regarding how having reliable internet service impacts their lives, members indicated that it's become essential, impacting all aspects of their life including work, school, telehealth, banking and other activities. Members also expressed that having internet access is key to keeping those living in rural communities connected, avoiding isolation.
- The discussion board revealed that members consider streaming among the most important online activities. Some mentioned having poor cell service and/or no landline making cellphone communication especially important. Other important activities mentioned include banking, shopping and remote work.
- Qualitative comments concerning the digital literacy or security topics of interest revealed that educational materials on security and scam avoidance is top of mind, along with modems that allow security setting and guides on updating passwords and best practices.



Key Findings

- An online discussion regarding ways the cooperatives could improve, add or change how they communicate reflects overall positive sentiment with many indicating they are well informed. Constructive comments focused largely on outage communication suggesting text as the best option.
- Online discussion about areas where cooperatives could be more present or engaged in the community also reflects an overall positive sentiment as participants report their cooperatives have a great presence in their communities. Suggestions include increased advertising and recruitment of local talent.
- Comments provided in a broader discussion about ways the cooperatives could improve focused on lowering prices, improving reliability, enhancing internet offerings, improving customer service and promoting renewable energy conservation.



Implications and Recommendations

Implications and Recommendations

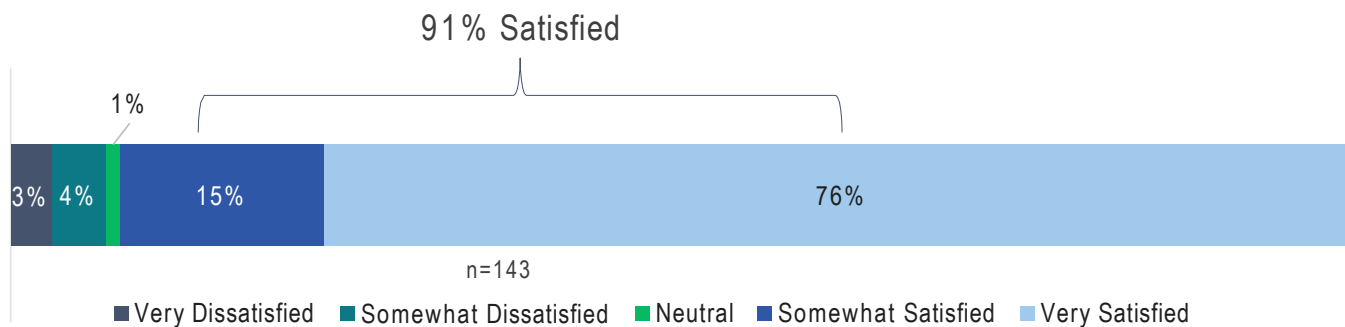
- Member experience with the internet service provided by their local cooperatives appears to be meeting and/or exceeding expectations. Regular measurement and communication of the results should be considered to leverage this positive sentiment and increase broadband penetration.
- Member preference for local ownership supports maintaining clear visibility into the cooperative's role in providing and supporting internet services.
- Considering members' openness to digital literacy education, consideration should be given to providing resources to help members get the most out of their internet service and reinforce its perceived value.
- Strong positive comparisons to prior ISP experiences suggest that member testimonials may be a credible way to illustrate the differentiation for cooperatives and potentially support long-term competitiveness as broadband options expand.
- Given that online security and privacy are major concerns for members, cooperatives should consider ways to alleviate the concerns by providing resources to educate them on best practices for keeping them safe.



Broadband Internet Service Feedback

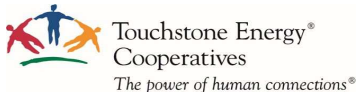
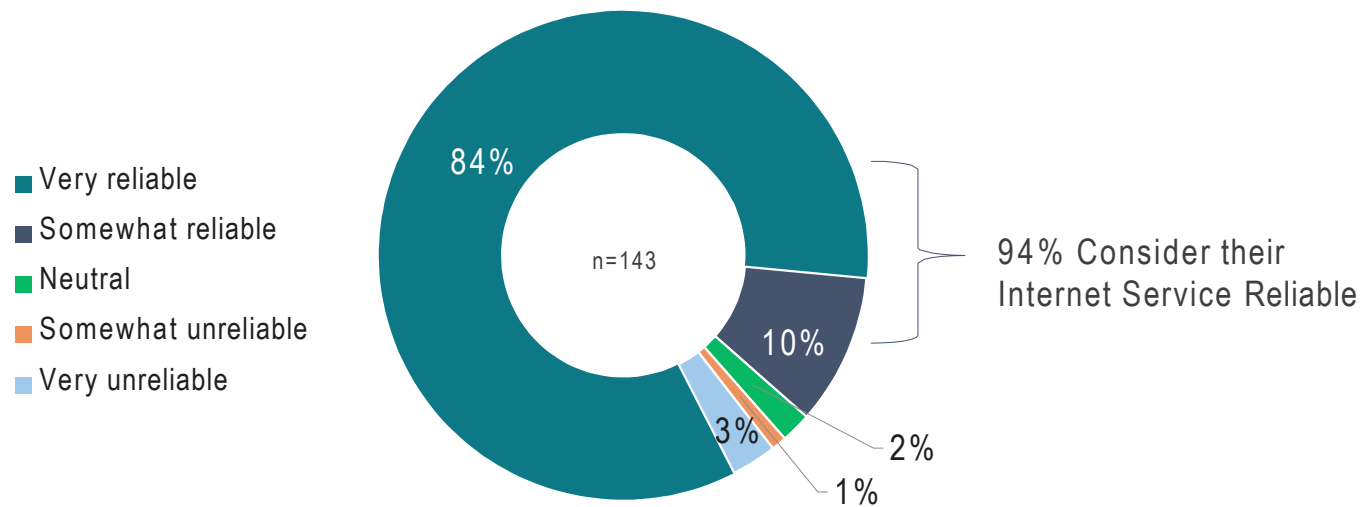
Broadband Internet Service Satisfaction

- The vast majority (91%) of members surveyed are either somewhat satisfied (15%) or very satisfied (76%) with the broadband internet service provided by their local cooperative.
- Fewer than one in ten report any level of dissatisfaction with their broadband internet service.



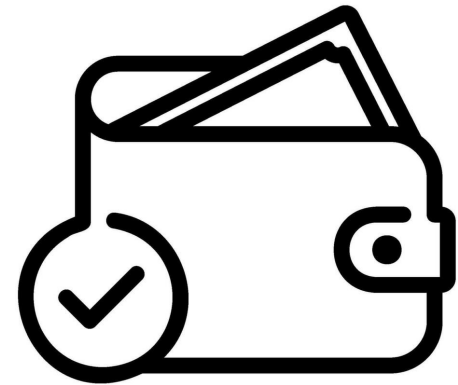
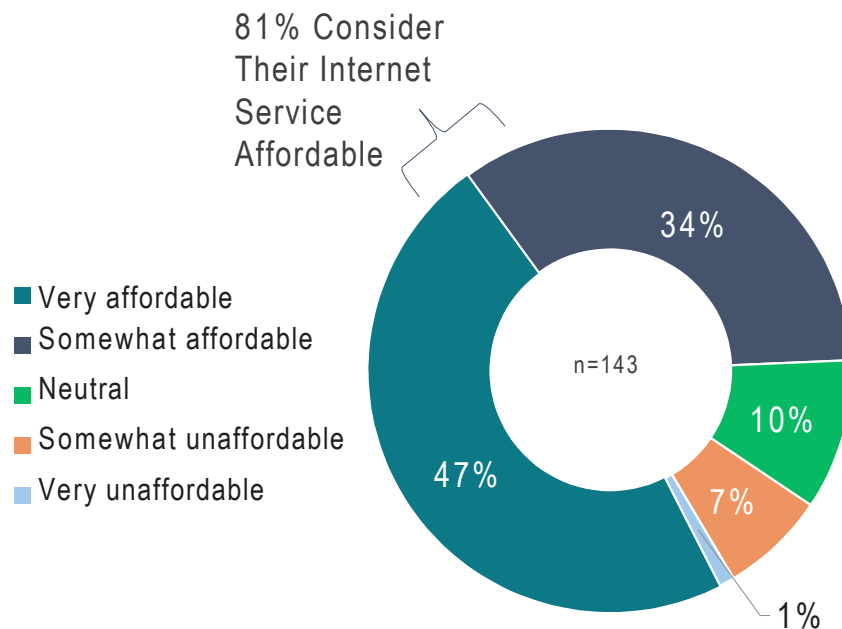
Internet Service Reliability

- More than nine in ten (94%) members believe their internet service is either somewhat reliable (10%) or very reliable (84%).
- Less than 5% say their service is unreliable (1% somewhat, 3% very unreliable).



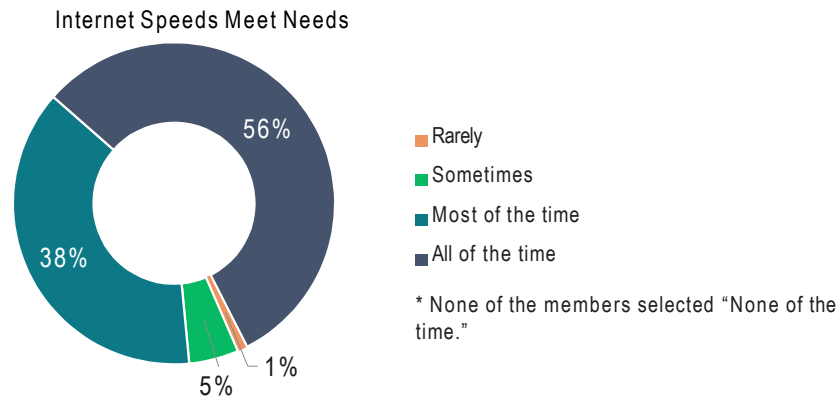
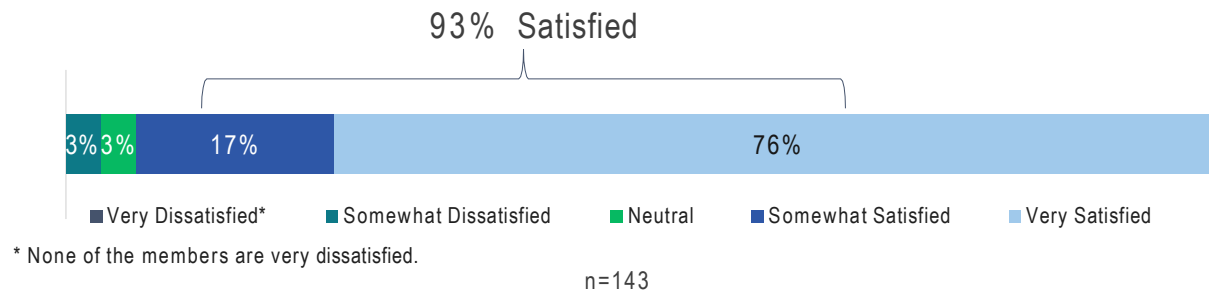
Internet Service Affordability

- More than eight in ten members (81%) say their internet service is affordable.
- Fewer than 10% express concern about affordability with 7% saying their internet service is somewhat unaffordable and 1% saying it's very unaffordable.



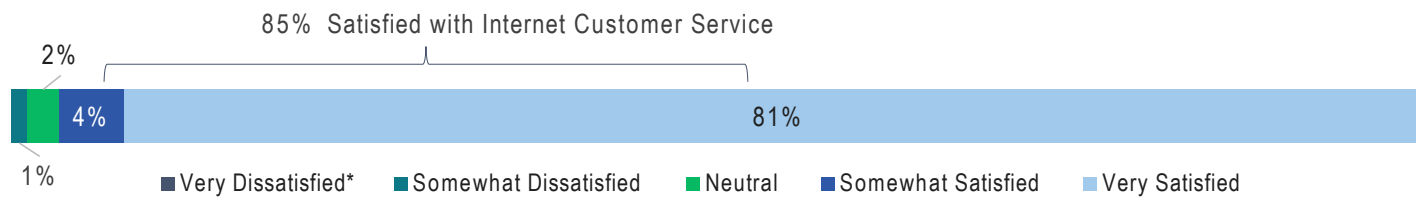
Broadband Internet Speed Satisfaction

- More than nine in ten (93%) members report being satisfied with the speed of their internet service with most of them saying they are very satisfied.
- More than half (56%) say their internet speed meets their needs all of the time, another 38% say it delivers most of the time.



Customer Service

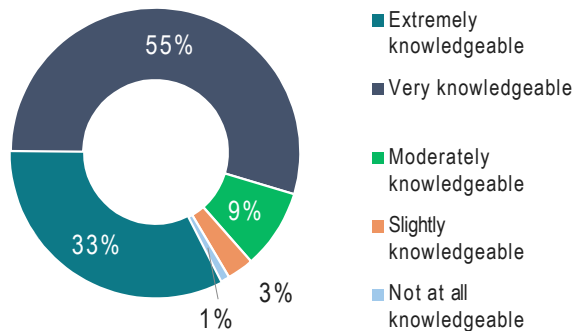
- An impressive 81% of members say they are very satisfied with the internet customer service they receive.
- 88% of members believe the customer service representatives are extremely knowledgeable or very knowledgeable and 63% say issues are resolved very quickly.



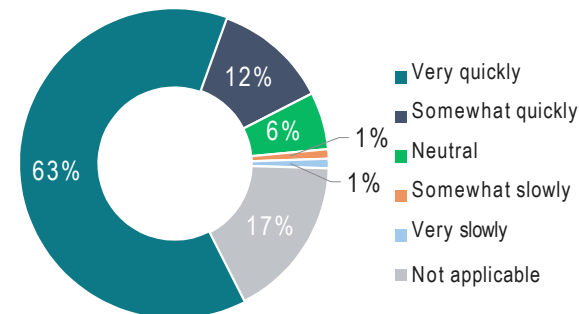
*No members indicated they were very dissatisfied. 12% of members haven't contacted customer service.

Level of Representative Knowledge

n=143

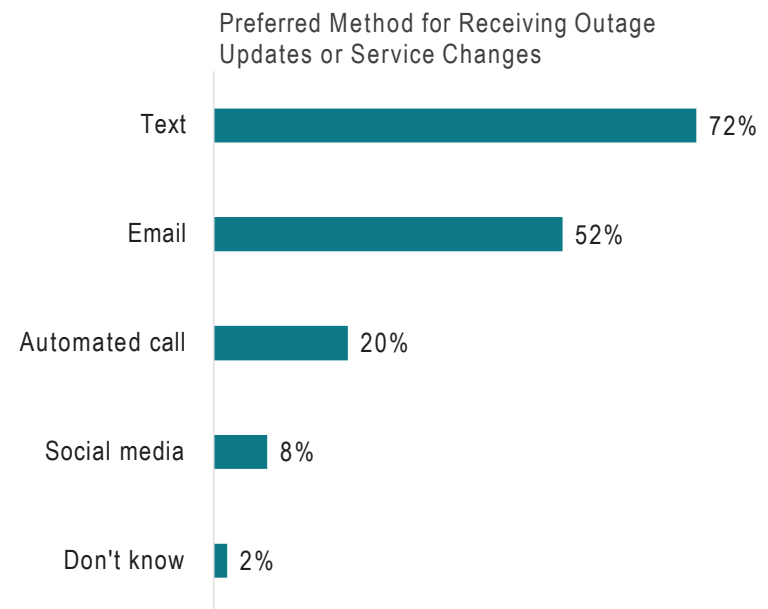
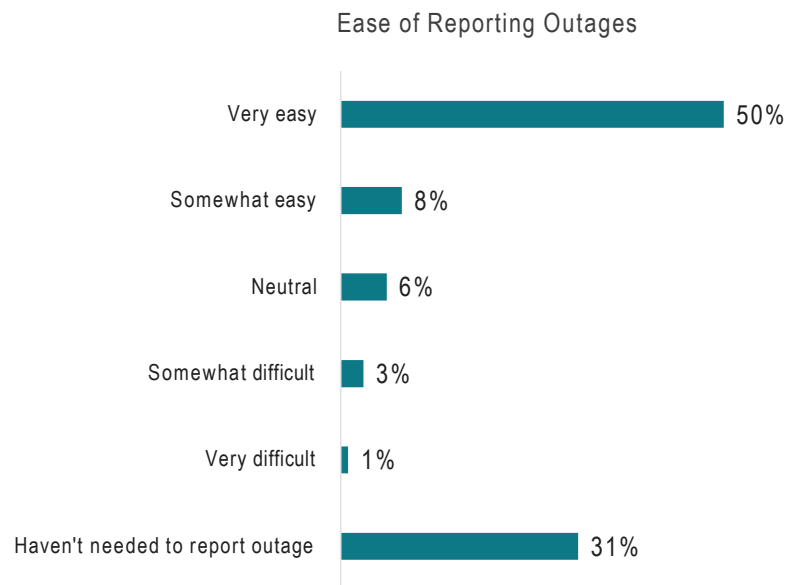


Speed of Issue Resolution



Outage Reporting

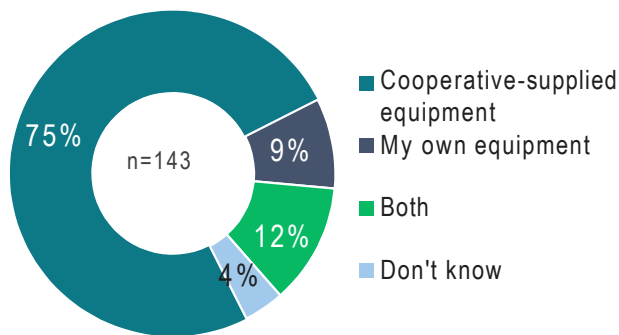
- Nearly one-third (31%) of members say they have never needed to report an outage, while half of those surveyed consider it very easy to do so.
- Text messaging and email are the most preferred methods for receiving updates on outages or service changes.



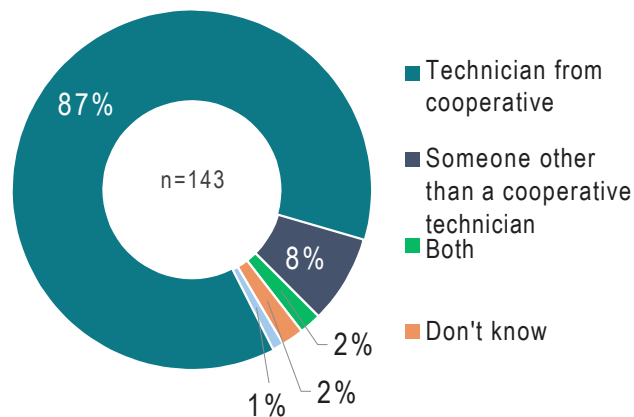
Broadband Internet Equipment

- Nearly 90% of members are using equipment (modem or router) provided by their local cooperative - 75% are using only cooperative-supplied equipment and 12% are using a combination of cooperative-supplied and their own equipment.
- Almost 9 in 10 (87%) say a technician from the cooperative installed their internet equipment and 73% of them report having no challenges with the installation.

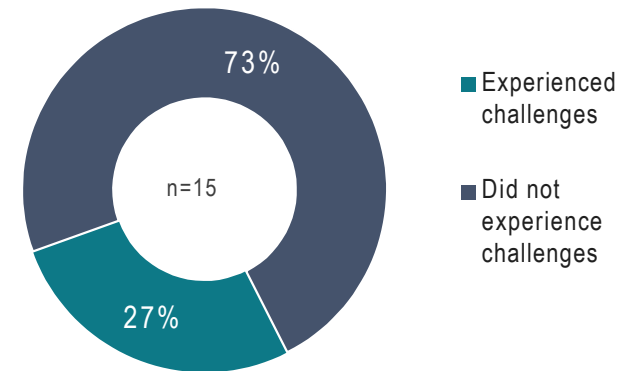
Internet Equipment Used



Equipment Installation

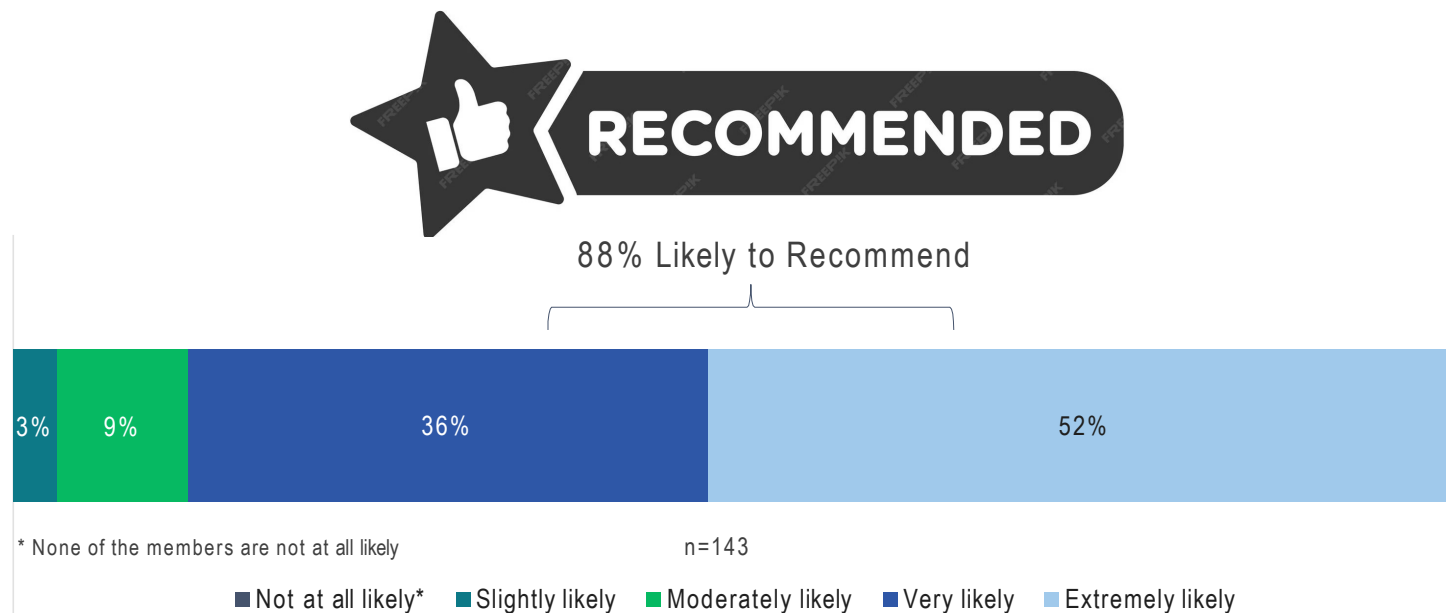


Equipment Challenges



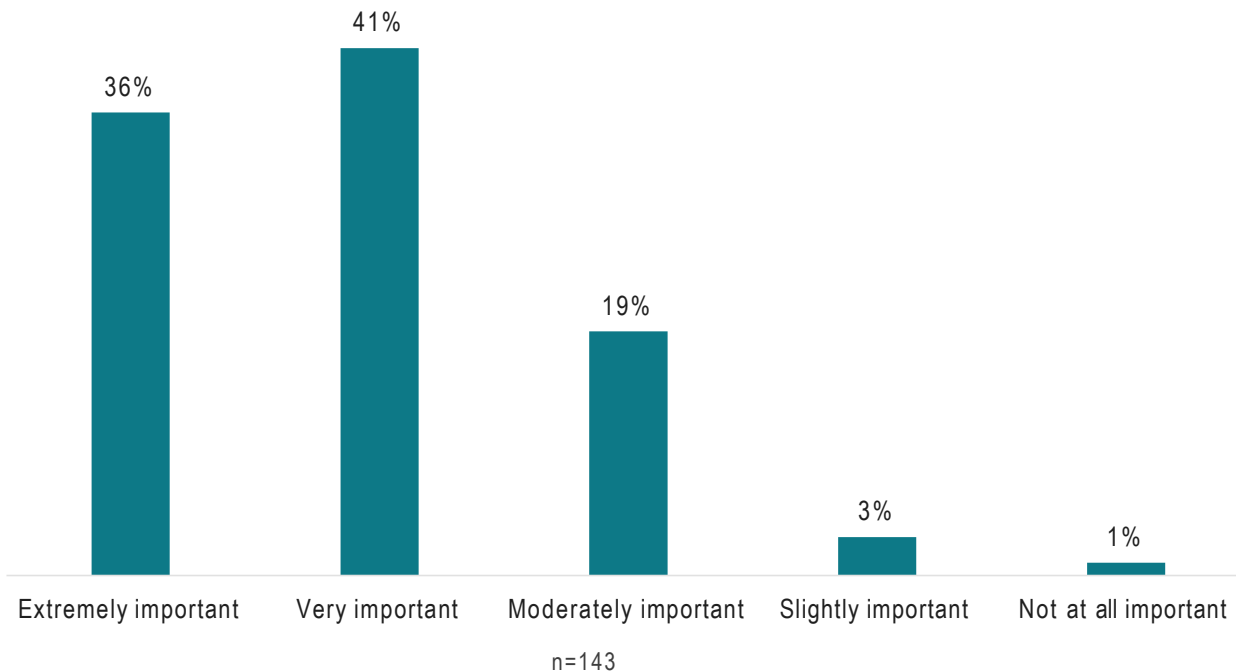
Likelihood to Recommend Broadband Internet Service

- Nearly nine in ten members say they would recommend the broadband internet services provided by their local cooperative – 36% very likely and 52% extremely likely. None of the members surveyed say they are not at all likely to recommend.



Importance ISP Locally Owned and Supports Community

- More than three-quarters of members emphasized the importance of having an ISP that is locally owned and supportive of the community with 36% saying it's extremely important and 41% responding that it's very important.
- Open-end comments from members reflect this sentiment and suggest even when there is another option, the cooperative is the preferred provider.



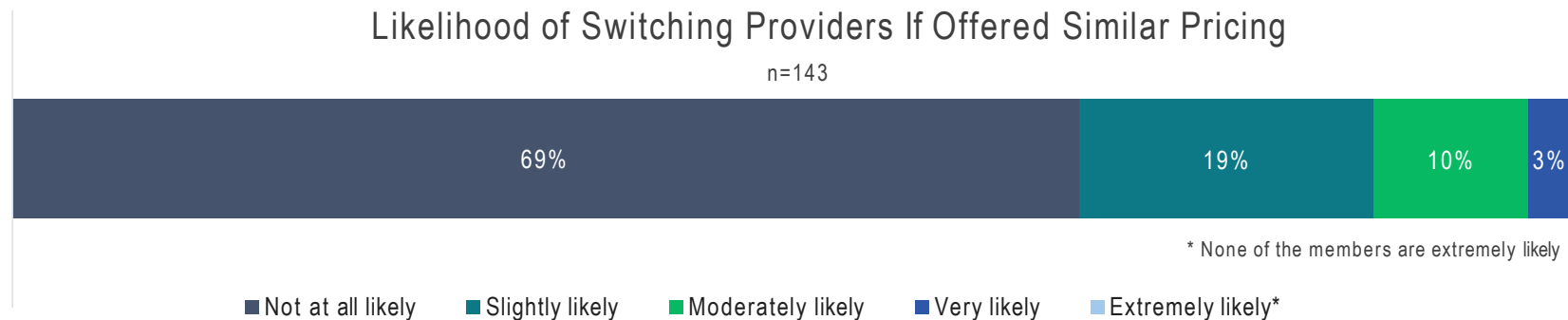
"As a member-owner of the co-op, I am very invested in keeping our cooperative current and meeting the needs of all of us. I advocated strongly for the expansion of the fiber optic service and know that of all options, my co-op would best meet my needs."

"It's a feeling of ownership. From the very beginning it was very obvious that ALL the people involved with the co-op put the customer first. I have used several different internet services but none of them came close to the quality of caring for the customer like you do."



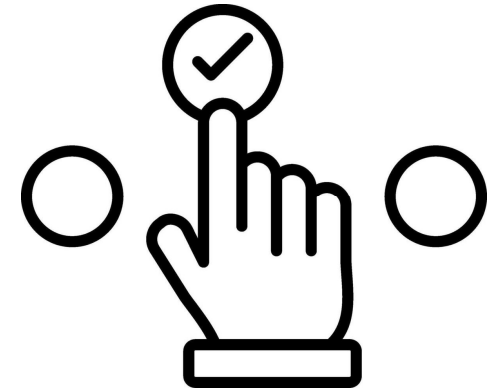
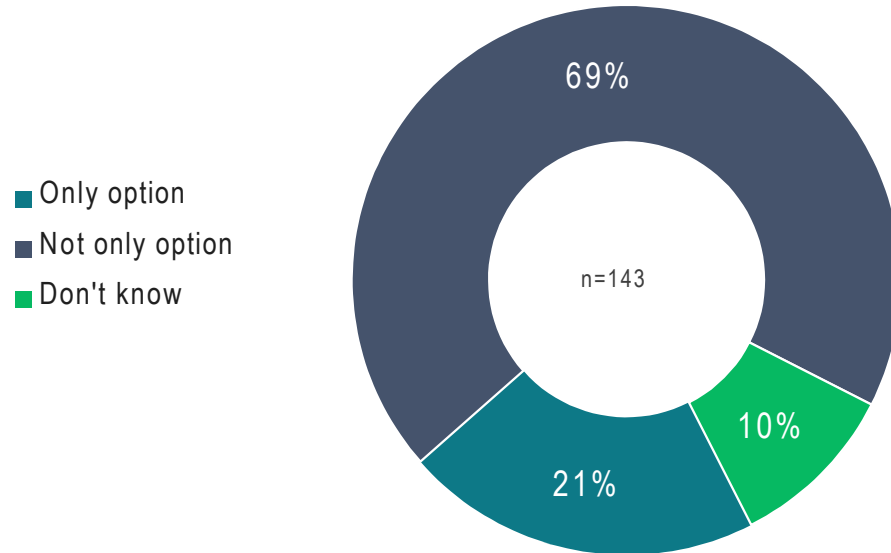
Likelihood of Switching to Service Offering Similar Pricing

- A testament to the positive experiences members are having with the internet service provided by their local cooperative, nearly 7 in 10 (69%) say they are not at all likely to switch providers even if the pricing was similar.



Local Cooperative Only Option for Service

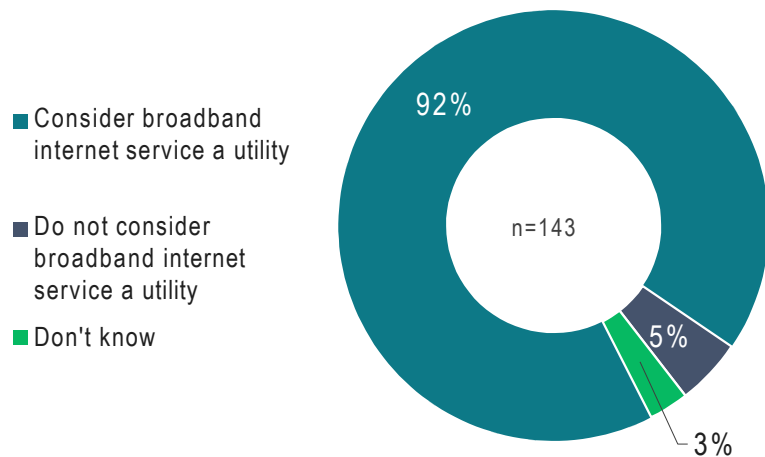
- About seven in ten (69%) members report that they have other options for internet service.



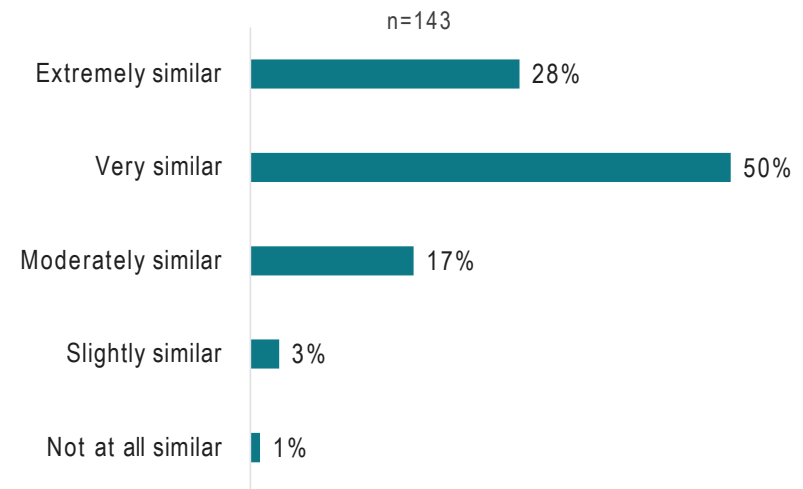
Broadband Internet Service as a Utility

- Over nine in ten (92%) members say they consider broadband internet service a utility, suggesting they view it as an essential service needed for daily life.
- Likewise, 78% say their expectations of their internet service are either extremely similar (28%) or very similar (50%) to other utilities.

Consider Broadband Internet Service a Utility



Expectations Compared to Other Utilities



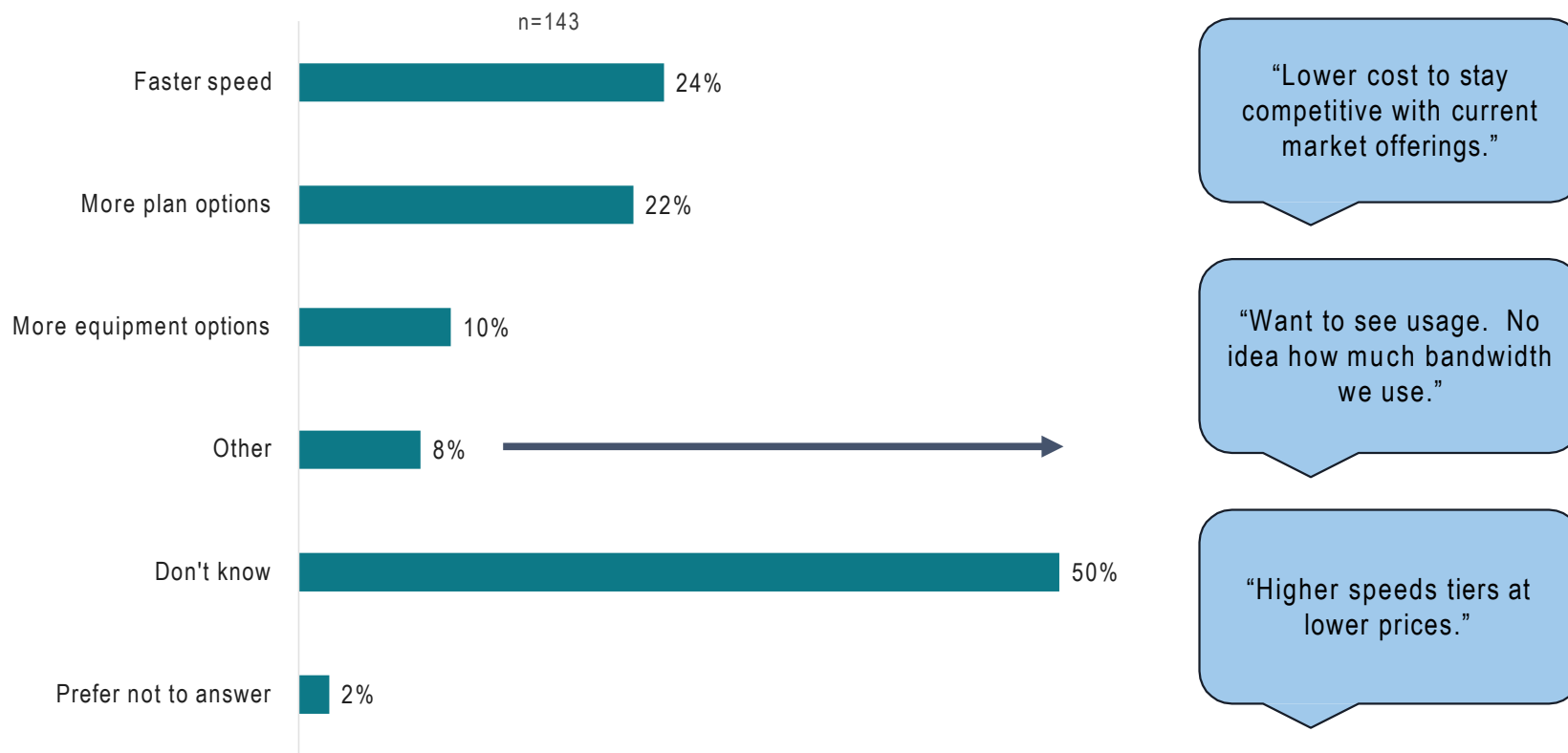
Value of Internet Service

- Nearly half of members surveyed consider their internet service provided by their local cooperative extremely valuable, while an additional 38% say its very valuable.



Improvements/Additional Features That Would Enhance Experience

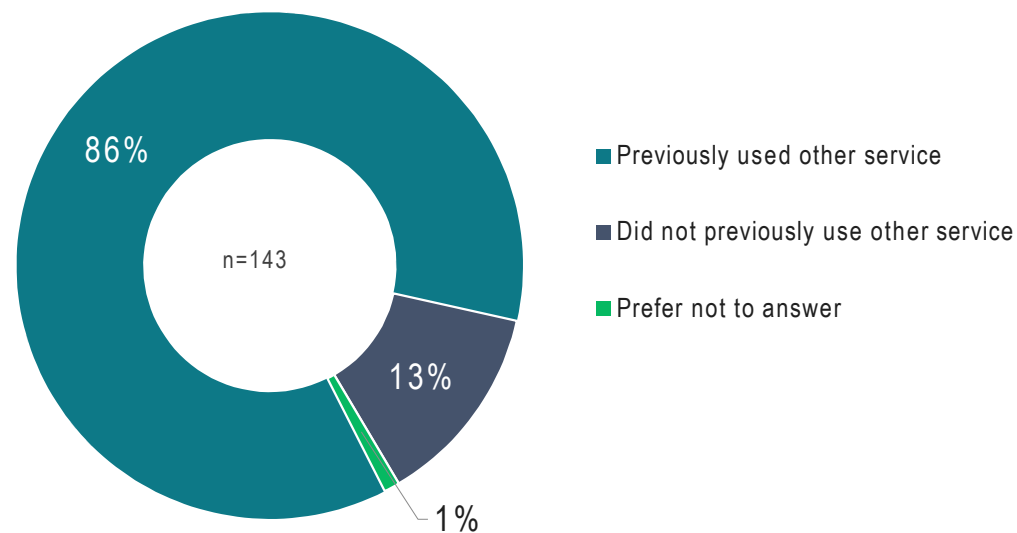
- While most members indicated they don't know what additional features would enhance their internet experience, about one quarter (24%) say faster speeds and 22% say more plan options.



Previous Experience with Other Internet Providers

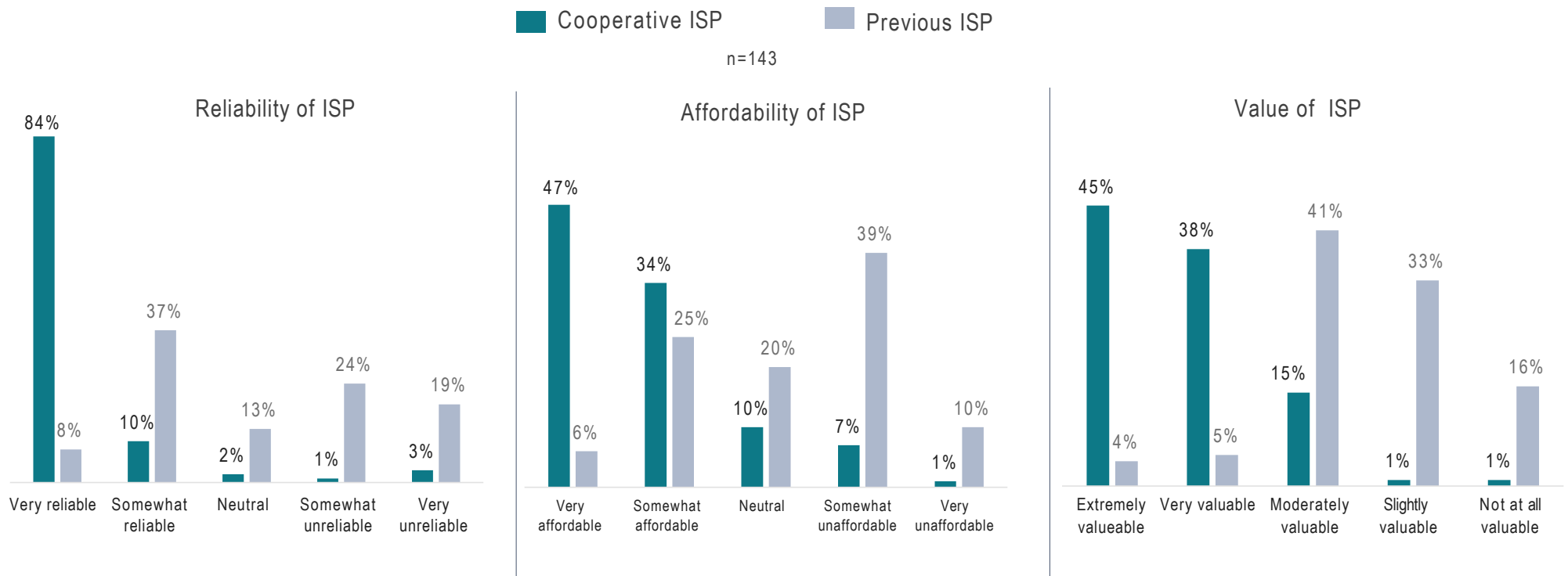
Previously Used Other Broadband Internet Service

- The vast majority (86%) of members report using a different internet service provider prior to receiving service through their local cooperative.



Internet Service Co-op vs. Previous Provider

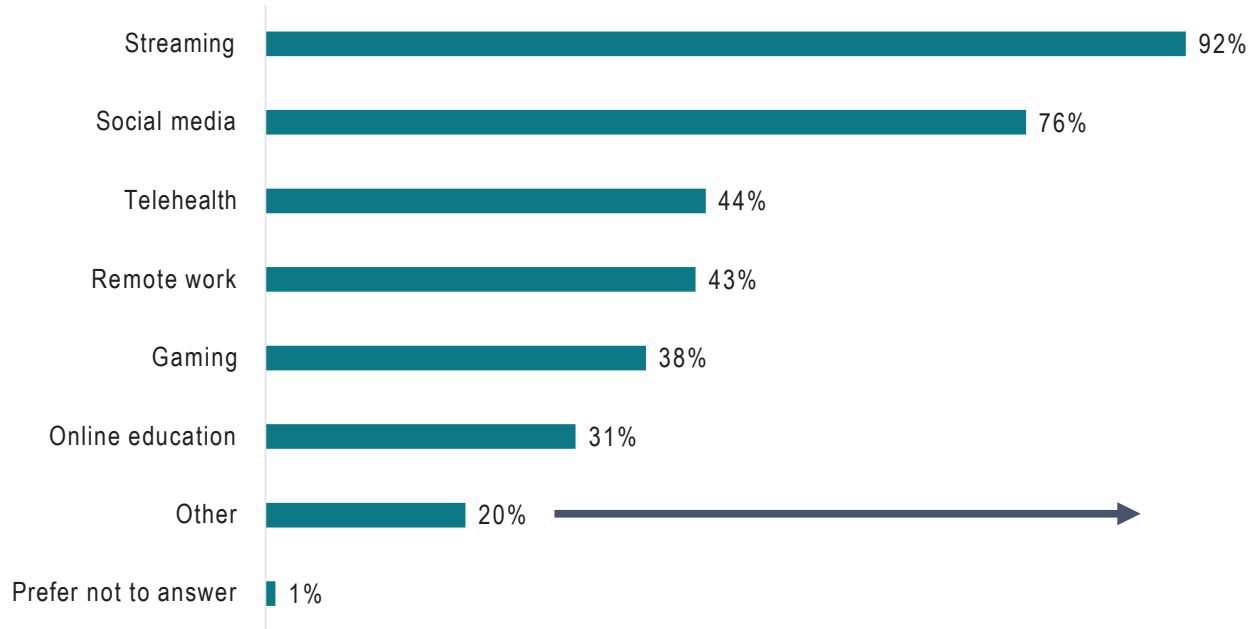
- Members with experience using other ISPs rate their cooperative-provided internet service much more favorably for reliability, affordability and value.



Internet Usage and Education

Online Activities Engaged In

- The two most common online activities cited by members are online streaming (92%) and social media (76%).
- Telehealth and remote work were each cited by roughly four in ten members, highlighting the importance of reliable internet access for essential aspects of daily life beyond entertainment.



n=143

“E-mail, tracking packages and mail, shopping, trip planning, banking and finances, research”

Other Online Activities

Banking

Email

News

Online Shopping

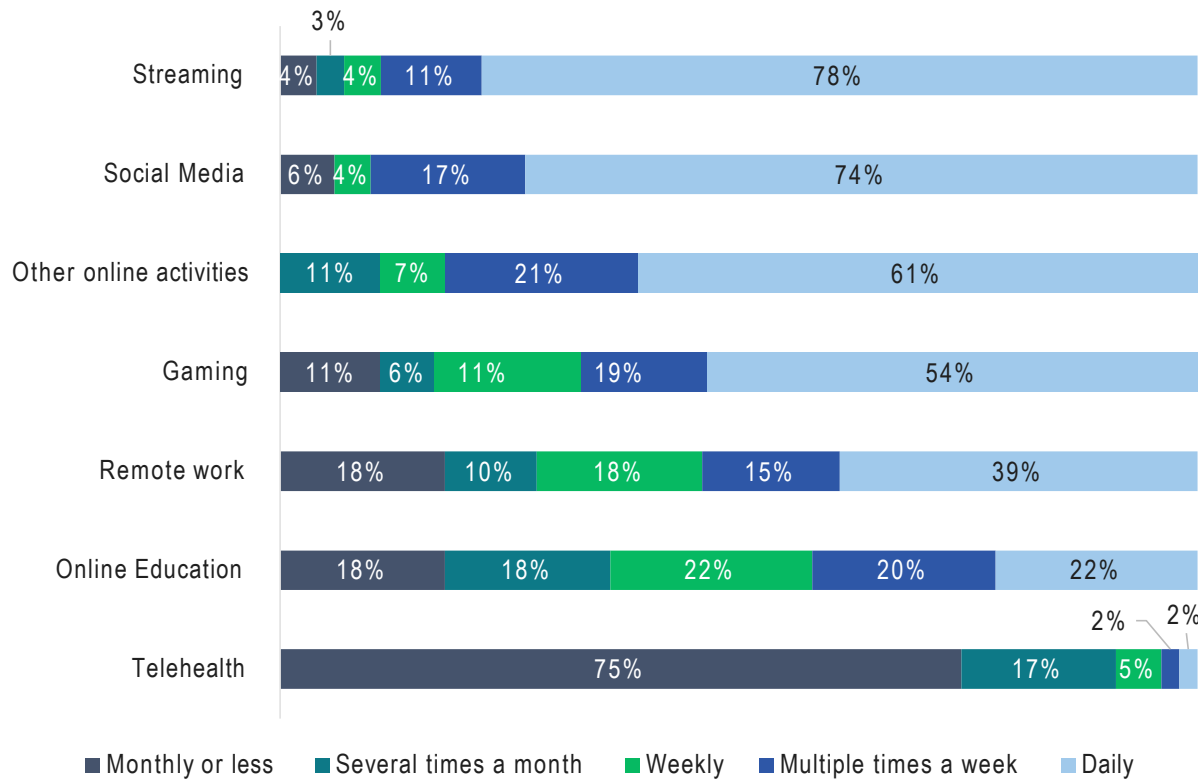
Smart Home Applications

Telecommunication (such as Zoom)

Research/Planning



Internet Frequency of Use

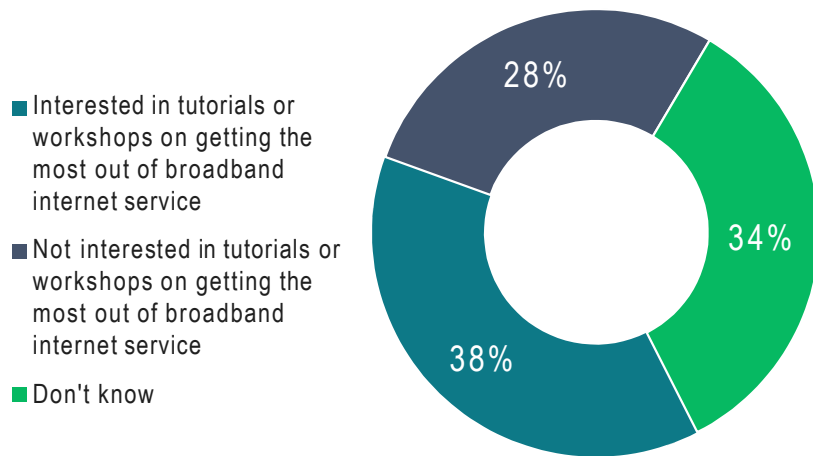


- Streaming and social media are the online activities most members use the internet for daily.
- The “other” online activities like shopping, banking, and smart home applications are daily uses for about 61% of members.
- While about 40% of members indicate they use the internet for remote work and telehealth, a smaller share report daily use for those reasons with 39% reporting daily use for remote work and 2% reporting daily use for telehealth.

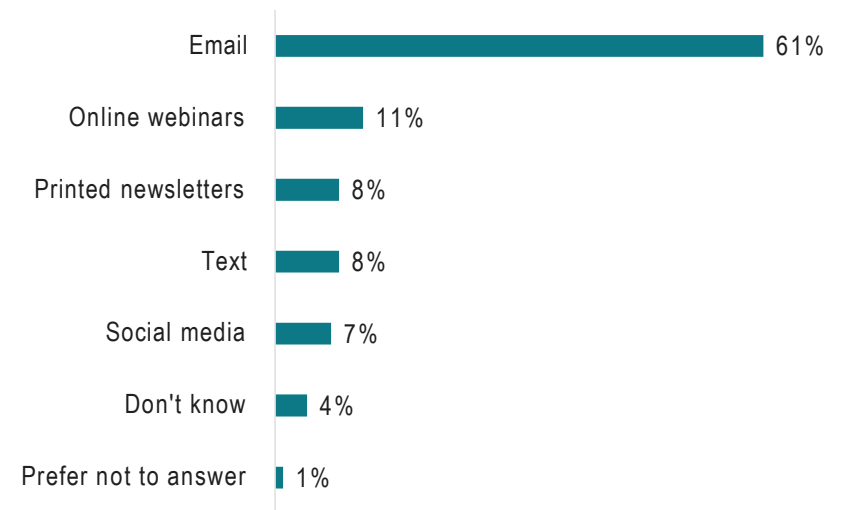
Member Perspectives on Broadband Education

- Approximately four in ten (38%) members express interest in tutorials or workshops to help them get the most out of their broadband system and another 34% may be interested but say they “don’t know” when they completed the survey.
- Email was cited by the largest percentage of members (61%) as the best way to share digital literacy tips with them.

Interested in Tutorials or Workshops



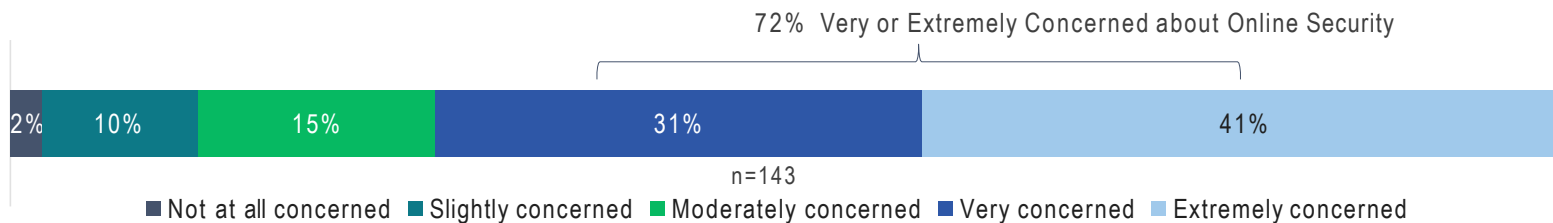
Best Way to Share Digital Literacy Tips



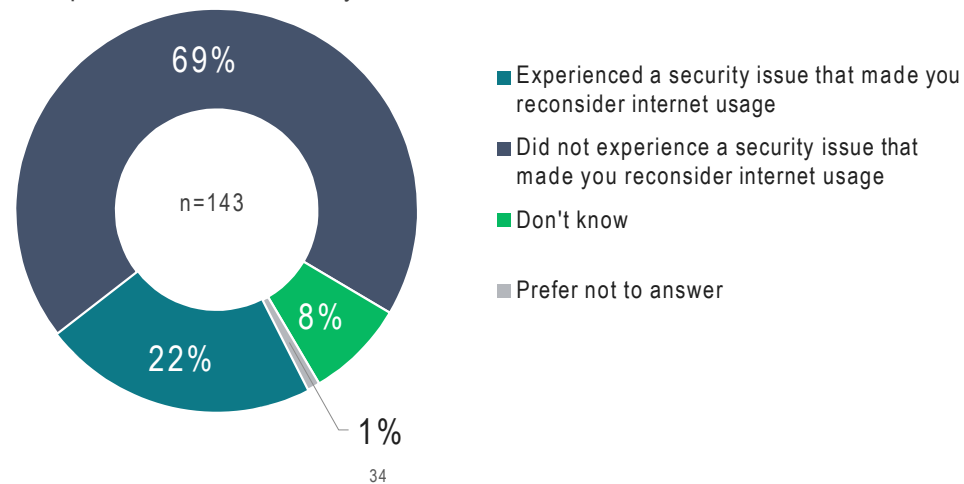
Online Security and Privacy

Concern About Online Security and Privacy

- Only 2% of members indicated they are not at all concerned about online security and privacy.
- Nearly two in ten (22%) members have experienced a security issue that has caused them to reconsider using the internet.

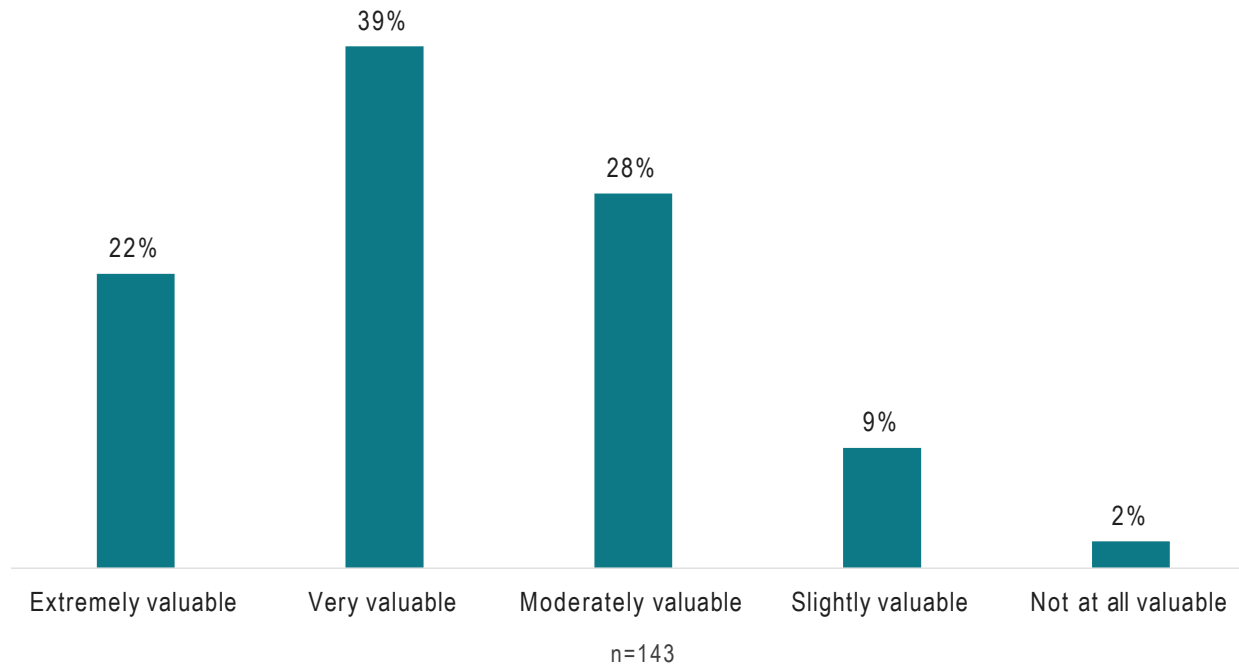


Experience with Security Issues



Value of Cybersecurity Best-Practice Resources Provided by Cooperative

- About six in ten (61%) members say cybersecurity best practice resources would be valuable (22% extremely, 39% very) if provided by their cooperative.

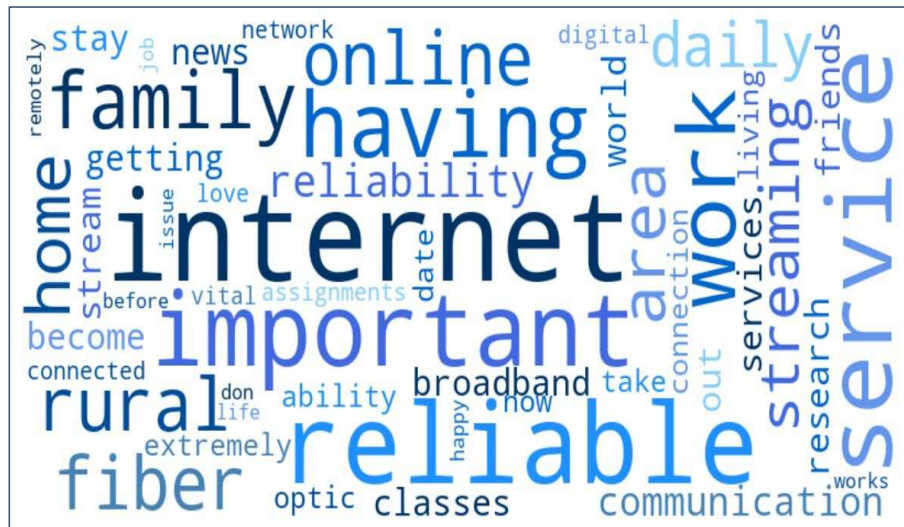


Internet Service Feedback from the Online Discussion Board

Online Discussion Board Sentiment Analysis

- Having reliable internet service greatly impacts all parts of members' lives. Internet service is used for work, education, telehealth, banking, and many other important activities that could not previously be done from home.
- Members, especially in rural communities, expressed that having reliable internet service helps keep them connected to the rest of the world.
- "I am retired now, so work is not an issue. But it is extremely important to me to be able to engage with friends and family via social media, as well as tracking medical information on my providers' portals. Getting out is sometimes a challenge, so online shopping is a huge benefit. I do all of my banking and other financial management online, as well, so having fast, reliable internet is extremely important. It is a comfort to know that my connection is always there and will allow me to do the things I need or want to do."

How does having reliable internet service impact your daily life or work?



Key Topics Referenced by Members

1. Connects rural areas – prevents isolation
2. Allows members to work remotely and participate in online education
3. Has become an essential part of most members' daily lives
4. Reliable service has allowed members to save money in other areas of their lives, such as entertainment

Online Discussion Board Sentiment Analysis

- Members participate in many different online activities that they feel are important day-to-day. Streaming was the most mentioned online activity that members feel is important to their household.
- Those living in more rural areas may not receive the best cell phone service, so broadband internet has become their main way of communicating and having access to others.
- “Streaming apps, zoom (for work), social media, news. Also, we don’t have a landline phone and get zero cell service so we rely 100% on internet for cellphone communication. If internet went down and an emergency happened we would be in trouble.”

Which online activities are most important to your household and why?



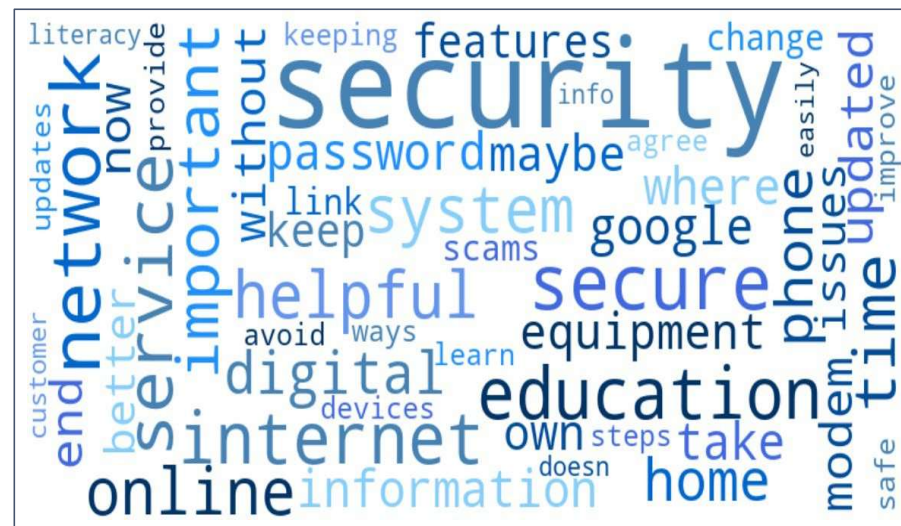
Key Topics Referenced by Members

1. Streaming
2. Social media/email/video calls
3. Online banking
4. Online shopping
5. Remote work
6. News and information

Online Discussion Board Sentiment Analysis

- Additional educational materials on things such as scam and phishing avoidance would be welcomed by members.
- Some members expressed confusion on how security updates are handled – whether they need to do anything or if it's handled by the broadband provider. Communication on how security updates were performed may help alleviate this confusion.

What education, digital literacy, or security topics would you like to receive more guidance on?



Key Topics Referenced by Members

1. Educational materials on security and scam avoidance
2. Modems that allow end user security settings
3. Guides on updating passwords and best practices

Overall Cooperative Feedback from the Online Discussion Board

Online Discussion Board Sentiment Analysis

- Members feel the cooperatives have great presence within their communities. Members specifically called out appreciating events held by the cooperatives such as computer trainings, food drives, school supply drives, and coat drives.
- "I'm not sure there is much that they can/should do beyond what they currently do. I appreciate the value and level of service that we receive by being members. As long as they continue to focus on the most reliable service at a fair price, they are performing community service for their members."

In what areas could your cooperative be more present or engaged in the community?



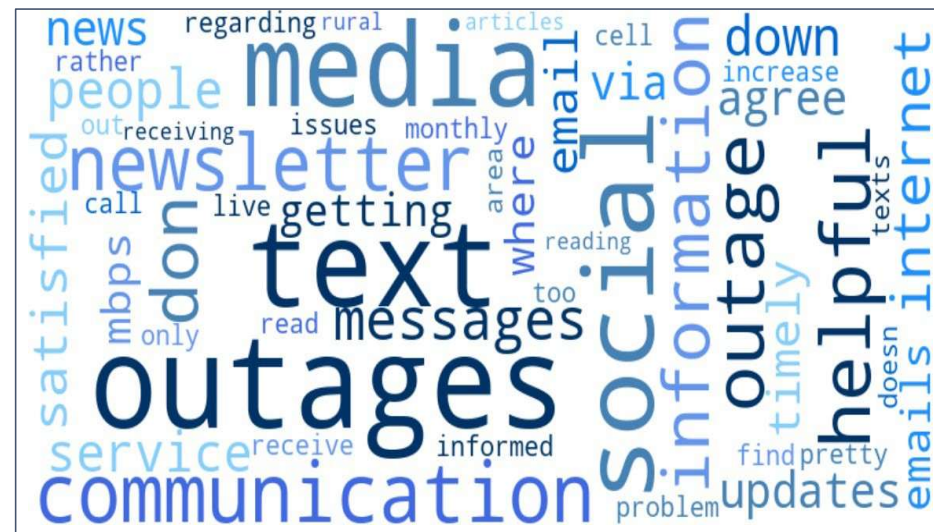
Key Topics Referenced by Members

1. Cooperatives are very present in the community
2. Increased advertising and public awareness of service could help pull in new members
3. Members would like to see more local recruitment of young talent
4. Members enjoy seeing local businesses highlighted in newsletters

Online Discussion Board Sentiment Analysis

- Overall, members are happy with the communication each cooperative provides. They feel they are well informed.
- Members enjoy receiving newsletters and reading the magazine. Some have suggested digital versions of the newsletters to make it easier to share with others.
- Outage notifications via text was the largest request received – members find this would be the most useful way to stay informed about outages.

Thinking about how your cooperative communicates with you, what could they improve, add, or change?



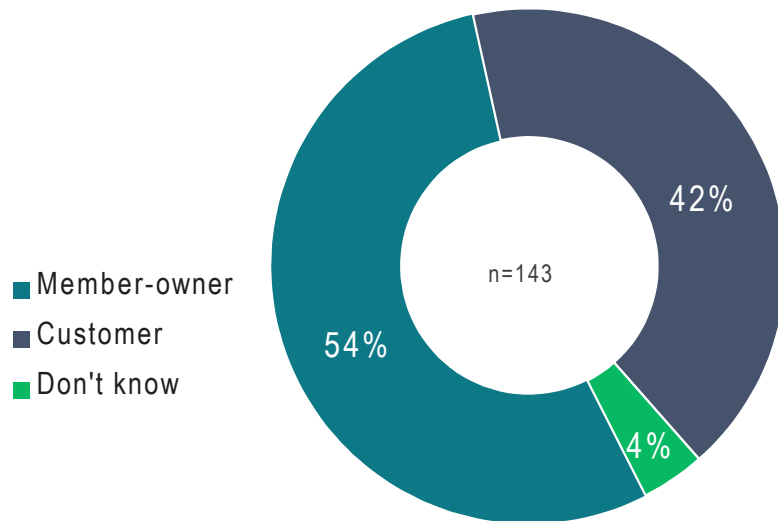
Key Topics Referenced by Members

1. Outage notifications via text
2. More frequent outage updates
3. Social media is not always the best way to notify about outages
4. Notification when systems like electronic payments are down
5. More communication on rate increases before they happen

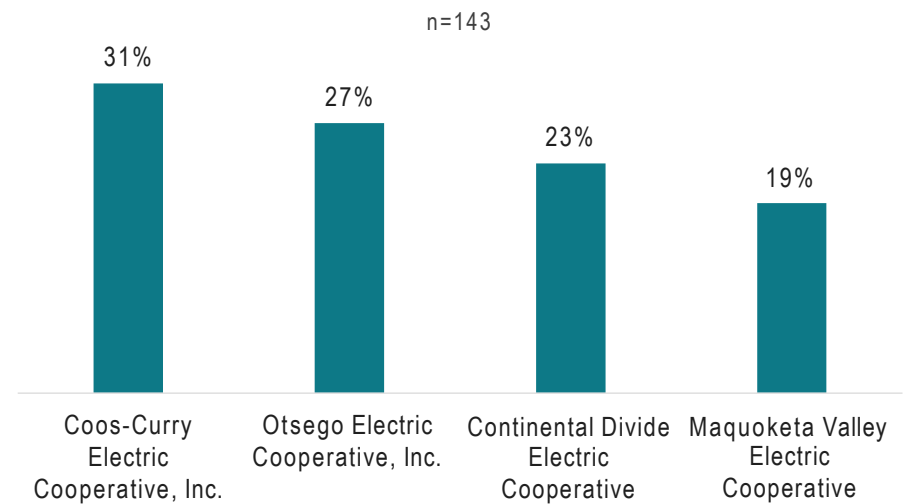
Respondent Information

Cooperative

Relationship with Cooperative



Percent of Participants from Each Cooperative



THANK YOU



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Cooperatives
The power of human connections®