Leveraging Broadband to Grow New Hampshire’s Economy!

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What is Broadband?

- The Federal Communications Commission (FCC) defines Broadband as, “high-speed Internet access that is always on and faster than the traditional dial-up access”
- Broadband speeds are defined as (at least) 768 kbps downstream and 256 kbps upstream
Why Should You Care?

Broadband is integral to the state’s and it’s regions’ capacity to improve its economic future and quality of life.
National Economic Impacts of Broadband Investment

• For each $1.00 invested in BB, the economy benefits nearly $3.00 (BEA)
• For every 1% increase in BB penetration, employment will increase by .2 - .3% per year (Brookings)
• Employment in manufacturing, financial services, health and education are correlated to BB access (Brookings)
• Health benefits to people 65 years and older estimated at $927 billion per year (Litan, 2008)
NH Economic Impacts of Broadband Investment

- In 2011, NH had a 73% BB penetration rate
- The total economic impact of Broadband was estimated at $634 million last year
- 11,000 net new jobs were created in NH in 2010 as a result of expanded Broadband infrastructure

Implications for Economic Development

- Improved ability to recruit & retain business
- Increased business profitability (and tax revenue!)
- Greater ability to attract the ‘creative class’
- Improved efficiency of municipal services
- Faster emergency response
- Stronger educational attainment
- Improved access to health care
What Needs around Broadband Have New Hampshire Constituents Shared?
# Stakeholder Groups

## NH Broadband Planning Sector Based Analysis Sectors

<table>
<thead>
<tr>
<th>Education</th>
<th>Health</th>
<th>Community Support / Gov</th>
<th>Public Safety</th>
<th>Business / Econ Dvlpt</th>
</tr>
</thead>
<tbody>
<tr>
<td>K-12</td>
<td>Hospitals</td>
<td>Town / City Gov Admin &amp; Services</td>
<td>Fire</td>
<td>Chambers of Commerce</td>
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<tr>
<td>Higher Ed</td>
<td>Doctor Offices</td>
<td>County Gov Admin &amp; Services</td>
<td>Police</td>
<td>Economic Development Corporations</td>
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<tr>
<td>Community / Continuing Ed</td>
<td>Clinics</td>
<td>State Gov Admin &amp; Services</td>
<td>Emergency Management</td>
<td>Travel &amp; Tourism</td>
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<tr>
<td>Museums, Science Centers</td>
<td>Nursing / Res Care Facilities</td>
<td>Libraries</td>
<td>Mutual Aid</td>
<td>Recreation</td>
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<td>Human Service Agencies</td>
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<td>Food &amp; Agriculture</td>
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<td>Lab Services</td>
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<td>Arts &amp; Culture</td>
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<td>Home Care Services</td>
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<td>Media</td>
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<td>Adult Day Care</td>
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<td>Real Estate</td>
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<td>Land Trusts / Open Space</td>
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<td>ISPs / Telecom</td>
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<td>Banking / Finance</td>
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<td>Manufacturing / Industry</td>
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Broadband Residential Survey (Granite State Poll)

Profile of respondents (N = 538):

✓ 86% said they have access to the internet at home
  - Of those who do, appx. 73% have high speed internet
  - Of those who don’t, 31% said it is too expensive and 25% can’t afford it
✓ 81% who have access use it for e-mail
✓ 69% shop on-line
✓ 25% use VPN connection
✓ The biggest barrier to use is keeping up with the technology
### Broadband Access by Geography

**Granite State Poll, April 2012**

<table>
<thead>
<tr>
<th>Region</th>
<th>Percent with Internet access</th>
<th>Type of Internet Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western New Hampshire</td>
<td>89.6%</td>
<td>Dial-up or Satellite – 38%</td>
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<tr>
<td></td>
<td></td>
<td>Broadband – 62%</td>
</tr>
<tr>
<td>Northern New Hampshire</td>
<td>85.6%</td>
<td>Dial-up or Satellite – 31%</td>
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<td></td>
<td></td>
<td>Broadband – 69%</td>
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<tr>
<td>Central NH/</td>
<td>83.4%</td>
<td>Dial-up or Satellite – 30%</td>
</tr>
<tr>
<td>Lakes Region</td>
<td></td>
<td>Broadband – 70%</td>
</tr>
<tr>
<td>Seacoast Region</td>
<td>86.1%</td>
<td>Dial-up or Satellite – 25%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Broadband – 75%</td>
</tr>
<tr>
<td>Central NH/</td>
<td>84.0%</td>
<td>Dial-up or Satellite – 17%</td>
</tr>
<tr>
<td>Hillsborough County</td>
<td></td>
<td>Broadband – 83%</td>
</tr>
</tbody>
</table>

Poll conducted by UNH Survey Center, April 9-11, 2012.
Broadband Technology Needs Survey of Small Businesses

Profile of respondents (N = 189):

✔ 70% said they use the internet for advertising

✔ 64% said that their internet speed is sufficient

✔ 51% of respondents were owner-operators

✔ 50% access the internet via cable
The most-identified training and application needs:

- Web-marketing tools and training (67%)
- Getting websites placed better in search engines (62%)
- Social media for business (60%)
- Buy Local website (60%)
- On-line entrepreneurs network (56%)
- Handheld/smart phone applications for business (53%)
Broadband Technology Needs Survey of Local Governments

Profile of respondents (N = 130):

✓ 63% of respondents were municipal employees
✓ 58% access the internet via cable
✓ 55% would like to learn more about e-governance
✓ 51% would like training on making websites interactive
Profile of respondents (N = 49):

- 74% of respondents represent K-12, 6% higher education
- 74% said their biggest challenge is keeping up with the technology
- 66% would like access to self-paced learning using technology
- 64% access the internet via cable or fiber
- 59% would like to learn how to effectively use technology for teaching
Implementation Activities to Date

✓ Putting your Business on the Digital Map (5 workshops)
✓ Social media for ag businesses webinar
✓ Broadband Planning/Partnerships workshop
✓ Support developing Nhseafood.com website for seafood industry
✓ Technical assistance and training to industry to use an on-line seafood purchasing system