



**University of New Hampshire**

The Survey Center

# Broadband Survey of NH Businesses Presentation

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**Prepared for:**

Live Free and Start

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The NH Division of Economic Development

## Background

Broadband, also called “high-speed Internet”, is the umbrella term referring to Internet access that is always on and is faster than dial-up Internet access.

New Hampshire’s citizens and businesses require high-speed Internet access to conduct daily activities. Availability of broadband can affect everything from public health and safety, to delivery of education, community vitality, government operations, worker productivity, and overall quality of life.

## Key Findings

### Current Internet Service

- Respondents most commonly report their business has an internet connection through a cable modem.
- Just over half have business-class service, and businesses are slightly more likely to purchase asymmetrical service rather than symmetrical service.
- Slight pluralities report purchasing speeds between 26 and 100 Mbps.

### Sufficiency and Reliability

- Four in ten respondents say their internet access speed is insufficient for their business's needs but only one in ten say it is unreliable.
- Nearly all respondents say their internet access is very or somewhat reliable and six in ten anticipate broadband will be much more important to their business in five to ten years.

### Internet Service Cost

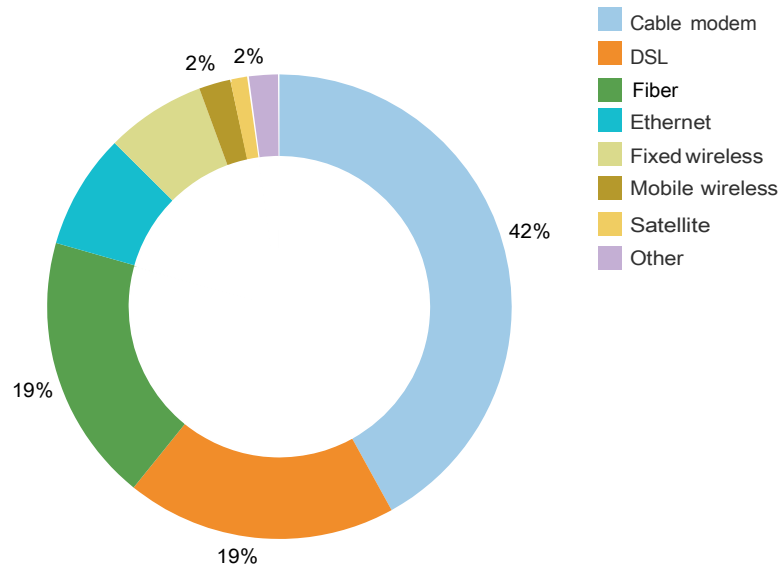
- Four in ten respondents say their primary business spends less than \$100 a month for internet services but one-third spend more than \$200 per month.
- Half of respondents are aware of other internet service options available to their business and just over a quarter say their business would be willing to pay more for faster or more reliable internet service.

### Working From Home

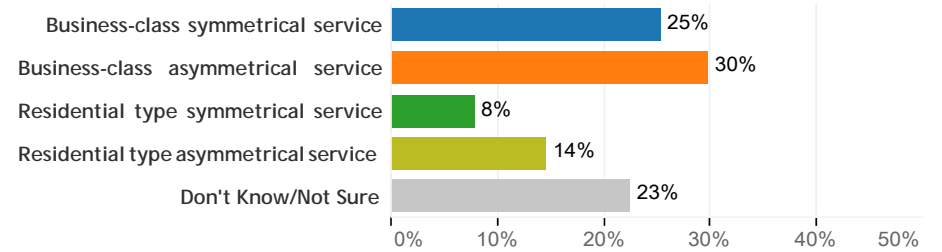
- Three-quarters of respondents say at least some employees at their business use broadband to do work from their home at least once a month; three in ten say all of their employees do.
- Three-quarters of respondents say it is very or somewhat important for employees at their business to be able to use the internet to do work from their home; nearly half say faster or more reliable home internet access would make employees more likely to telework from their home.

## Current Internet Service

Which of the Following Best Describes the Primary Internet Connection at Your Business?



Which of the Following Best Describes the Type of Service at Your Business?

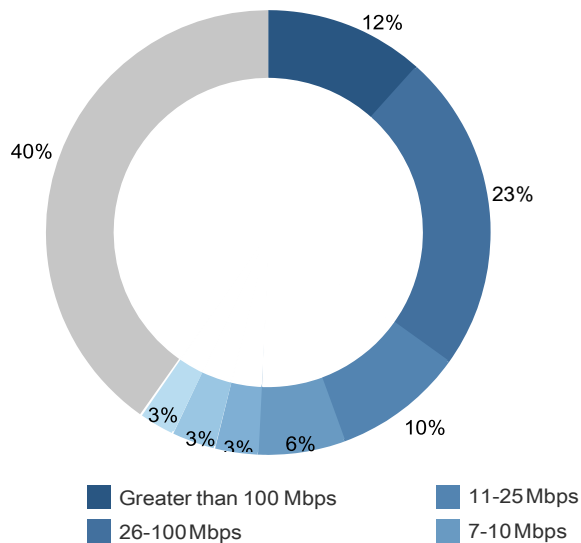


### Selected Additional Comments About Current Internet Service

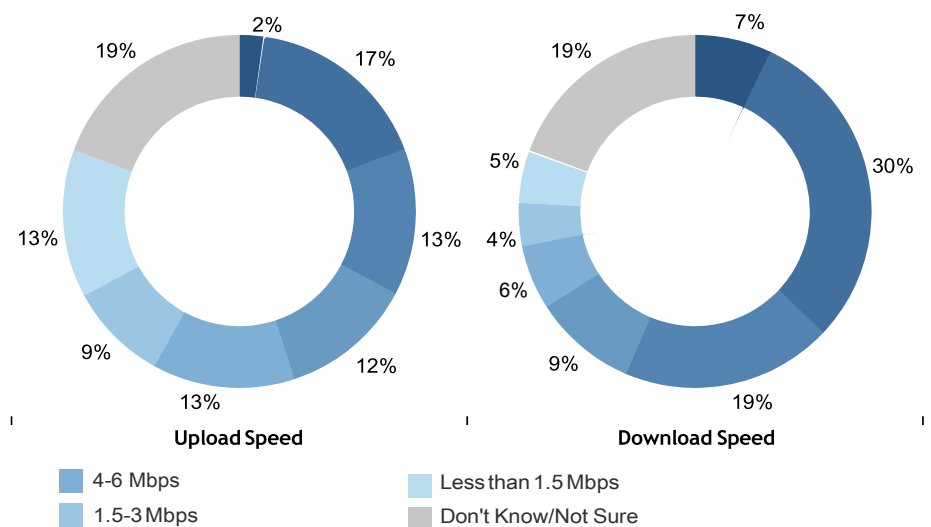
*"Our primary internet service is very good. It is the lack of high speed internet at the outlying towns that constrains us.*

*There is little competition as far as providers go. The two options that I have are cable and satellite - two totally different technologies - yet the price is the same."*

Internet Speed (Bandwidth) Business Purchases (Among Those with Symmetrical Service)

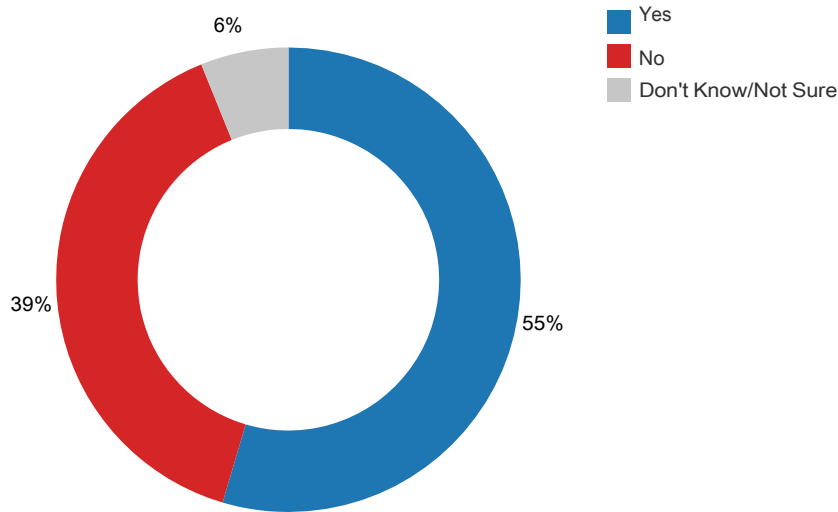


Upload and Download Speeds Business Purchases (Among Those with Asymmetrical Service)

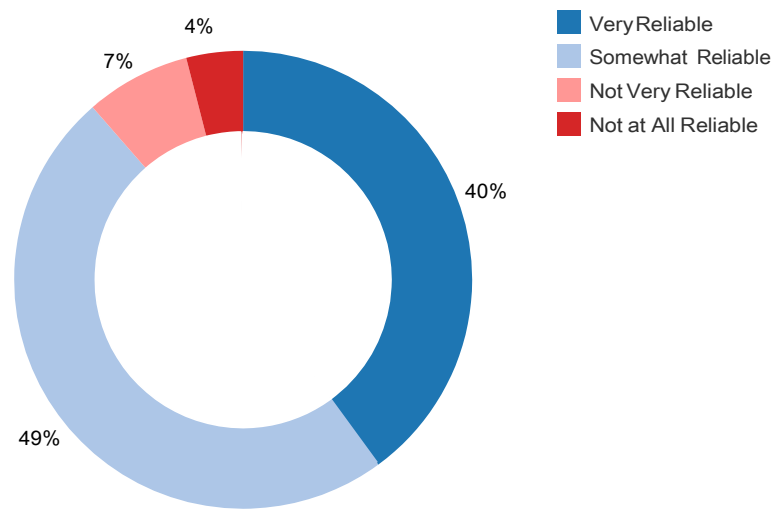


## Sufficiency and Reliability

Is Your Internet Access Speed Sufficient for Your Business's Needs Today?



How Reliable is Your Business's Internet Access?



### Selected Additional Comments About Sufficiency and Reliability

*"Noticeable lag under heavy load. We're hiring more people and so we'll need to increase bandwidth to sustain the increased load."*

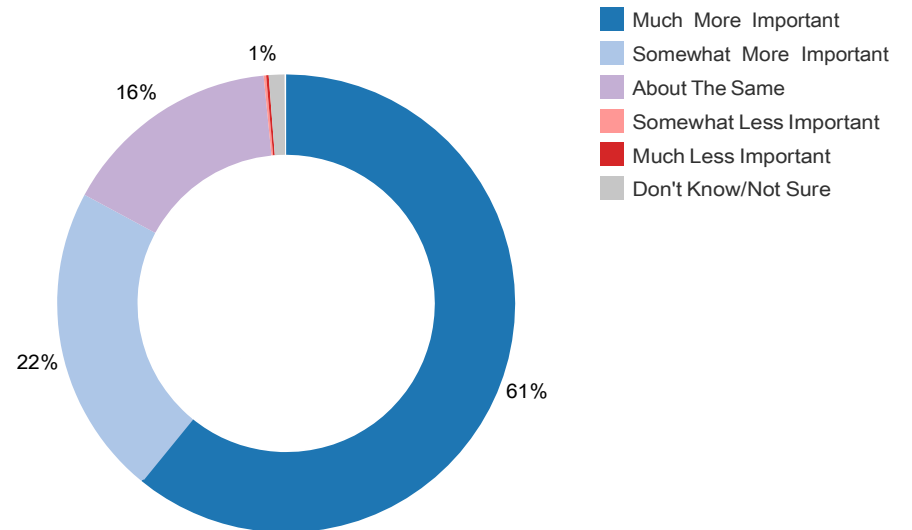
*"Both upload and download speeds are slow. Little ability to stream & if we do it's slow and stuttering. We are a hospitality business and our guests can get wi-fi to read emails, etc, but when many are using the service it is extremely slow..."*

*"It takes a long time to download attachments (photos and documents) I receive from my clients."*

*"It shuts down occasionally for no apparent reason and I have to reboot the router."*

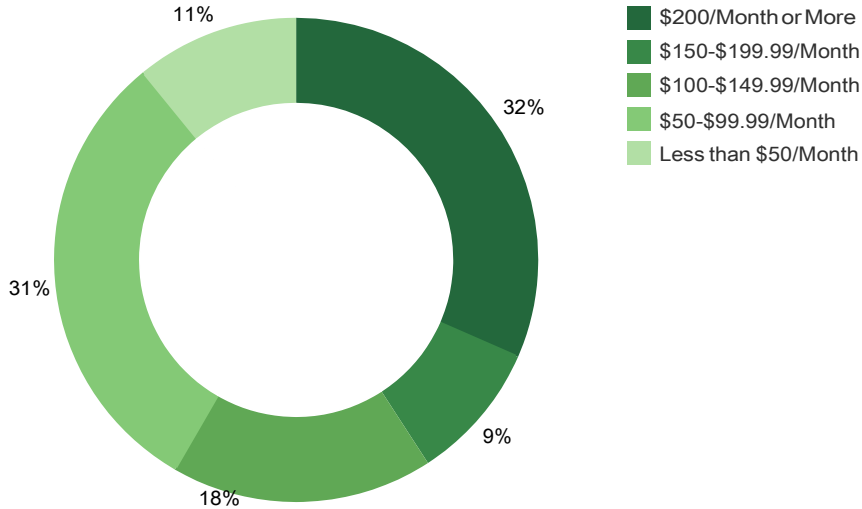
*"Service goes in and out with no warning. Devices are often disconnected and have to be set up over and over again."*

Looking Ahead, How Important do you Anticipate Broadband Will be to Your Business in Five to Ten Years Compared to Now?

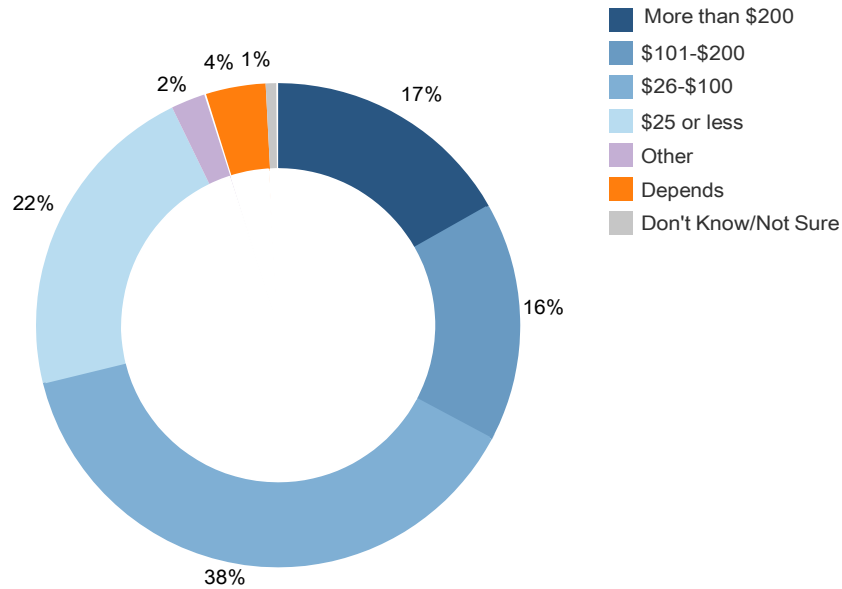


# Internet Service Cost

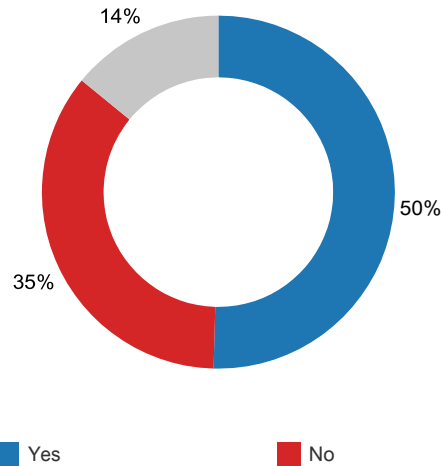
What is the Monthly Cost of Your Business's Internet Services?



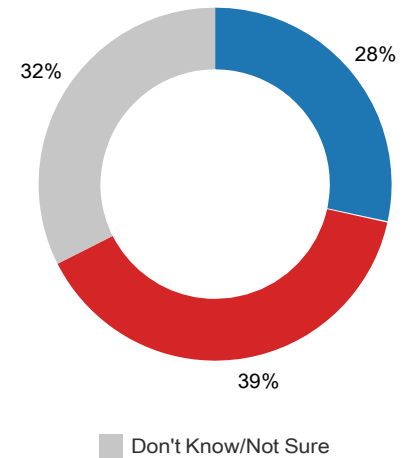
How Much More Would Your Business be Willing to Pay Per Month?



Are You Aware of Any Other Internet Service Options Available to Your Business?



Would Your Business be Willing to Pay More for Faster or More Reliable Internet Service?



Selected Additional Comments About Internet Service Cost

*"The cost of our broadband service has increased by 65% over five years, while the speed and reliability have not improved."*

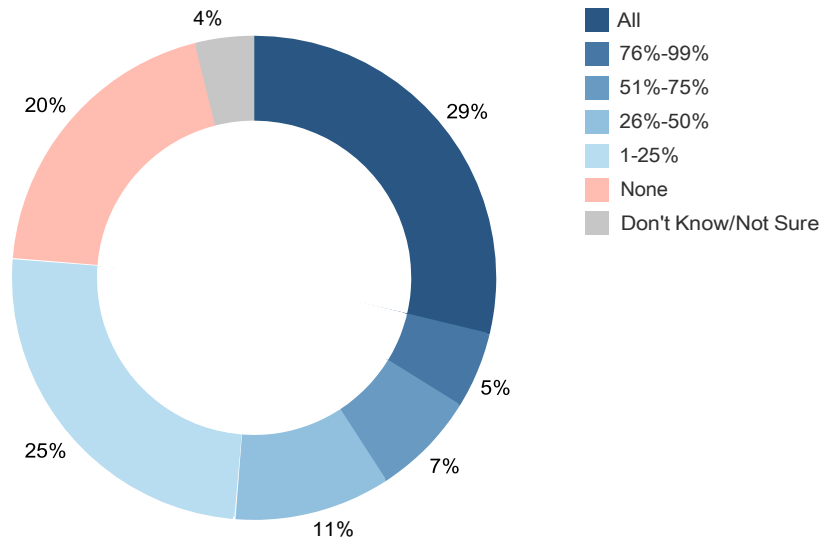
*"The cost is the issue if we were to increase our speeds."*

*"The jump from \$200-300/month for business class service that's not adequate to enterprise services in the \$1200-2000/month with long term contracts you can't get out of leaves a huge gap where growing businesses like mine can't get sufficient service at a price we can afford."*

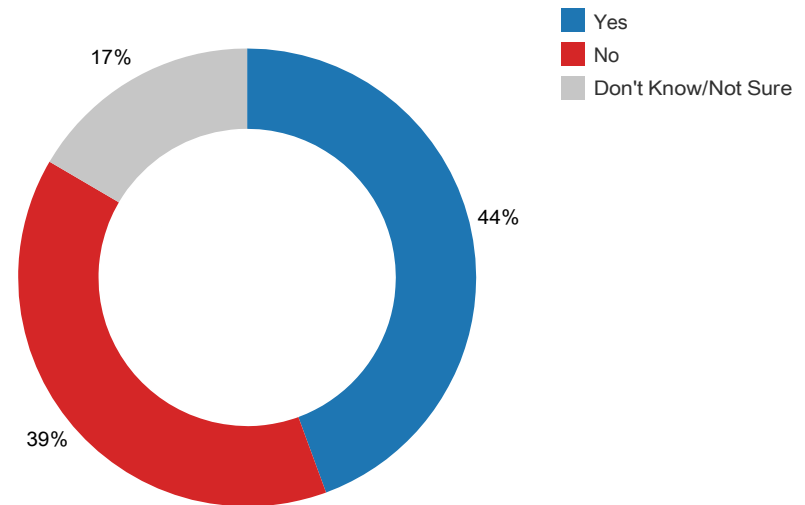
*"There is little competition as far as providers go. The two options that I have are cable and satellite - two totally different technologies - yet the price is the same."*

## Working From Home

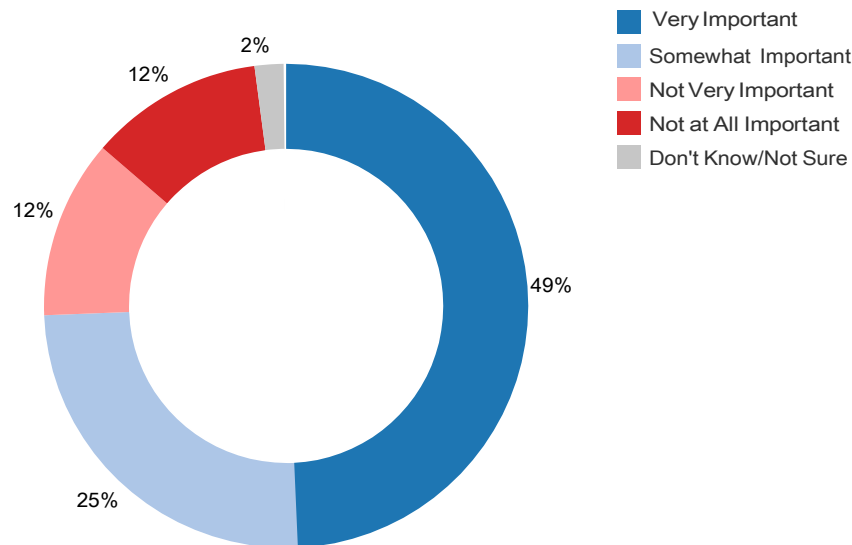
% of Employees at Business Who Currently Use Broadband in Order to do Work From Home at Least Once a Month



Would Faster or More Reliable Home Internet Access Make You or Other Employees More Likely to Telework From Their Home?



How Important Overall is it For Employees at Your Business to be Able to Use the Internet to do Work From Home?



Selected Additional Comments About Working From Home

*"High speed internet service is absolutely critical to growing a technology business. We provide high paying jobs with good benefits. Our company is held back by the lack of high speed internet options for our employees at home. An improvement would make a meaningful impact on economic development. To be competitive we need everyone to be able to fully use the internet."*

*"Severely lacking reliable high speed internet in many small towns in NH that our employees live in, which make it difficult for them to work from home when needed."*

*"We are a nonprofit organization consisting of visual artists and artisans. Our members usually work at home and need access to a global market place. As we live in a rural, underserved area, we need internet service to reach our customers."*

## Additional Comments

*"As a municipal government in a rural NH community we see that the lack of broadband access in different parts of town has an effect on property sales and commercial endeavors. The negative impact on the local economy is real."*

*"High speed, reliable, affordable internet service is ESSENTIAL for our economy and our education health and safety systems."*

*"Home based connections are critical to selling homes, attracting workforce, and accommodating telecommuters, home based businesses and start-ups. They are the fuel for retaining our existing employer base and generating our businesses of the future. "*

*" It's not only broadband speed, availability, and cost that is preventing some businesses in NH to suffer. There is still widespread unavailability of cell service."*

*"Internet access is a necessity and rural communities will continue to lag behind in economic growth if we do not address the issue of consistent and cost-effective access throughout the state."*

*"Our company is held back by the lack of high speed internet options for our employees at home. An improvement would make a meaningful impact on economic development. To be competitive we need everyone to be able to fully use the internet."*

*"Our town and small businesses are dying for RELIABLE internet service. We have literally had folks decide not to purchase homes/start small businesses here when they learn of the lack of adequate service. This issue is strangling us and other small New Hampshire towns like us."*