



## **Marathon County**

### *Business Community Broadband Access Survey Report*

August, 2009

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# Marathon County Business Community Broadband Access Survey Report

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Front Range Consulting, Inc., together with Riedel Communications, Inc., conducted an online Broadband Access Survey for Business Owners and Managers as part of the consulting engagement with Elert & Associates<sup>1</sup> and Marathon County, Wisconsin (the “County”). The following Report is the result of that survey, and sets forth our findings, conclusions and recommendations.

## Overview

The purpose of the Business Owners and Managers survey was to assist the County in making an initial determination as to whether the broadband needs of businesses located within the County were being adequately met<sup>2</sup>. This survey will be used as a primary research survey tool for the County’s broadband assessment and inventory project and will be augmented with individual business and agricultural interviews conducted by Elert & Associates. The on-line survey was sent to businesses that were members of the Marathon County Chamber of Commerce, since there was no formal and complete database of businesses located in Marathon County. Although the results of the on-line survey cannot be guaranteed to be statistically valid since it was sent to a limited number of businesses (Chamber of Commerce Members) and was not randomly conducted. However, we do believe that the similarity of the responses received does portray a reliable and accurate picture of the availability of broadband Internet access in the County, at least with respect to the urban corridor surrounding the City of Wausau, WI. Because the survey generally elicited responses from businesses in the Wausau to Mosinee to Weston urban triangle, it is possible that broadband Internet services available to businesses located outside this urban triangle may be different (*e.g.*, in terms of speeds, and the number and types of Internet access providers) from those accessible within the urban triangle. . The overall availability of broadband Internet access to businesses inside and outside the County’s urban triangle is also indirectly addressed in the statistically valid residential community survey of broadband Internet access throughout the County that was conducted separately.

Overall, it appears that the respondents to the business survey were generally satisfied with their current Internet service provider but that they would be willing to consider changing providers based upon price, speed and reliability factors. Video conferencing and transmitting large files appeared to be the major drawbacks, presumably because of the speed limitations, of some of the current providers but may also indicate that if speed and upload and download constraints are not addressed by the current providers, these factors may have a impact on the economic climate for a new business considering a location within Marathon County

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<sup>1</sup> Bradley & Guzzetta, LLC are also part of the consulting team with the County.

<sup>2</sup> Broadband Internet access for purposes of this Report is at least 768 kbps downstream and 200 kbps upstream as defined by the NTIA in its Notice of Funds Availability (“NOFA”), which was released on July 9, 2009.

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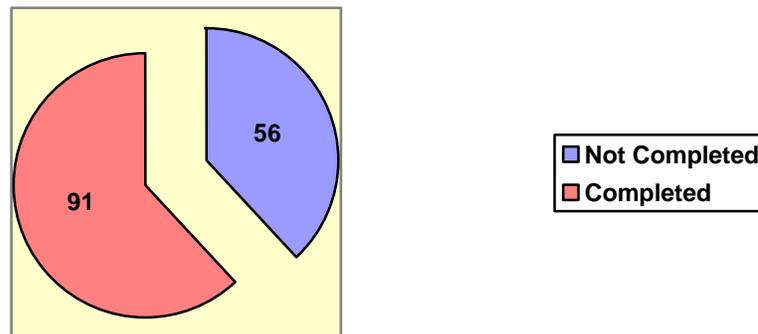
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## Methodology

It was determined that the most cost-effective vehicle for assessing the broadband Internet access for businesses in Marathon County was to conduct an online survey of business owners and managers. The survey consisted of questions to elicit both quantitative and qualitative answers. There were thirty-one questions, as well as a request for the respondent's name, name of business, and location. A copy of the survey is attached as Exhibit 1 to this Report. The average time it took to complete the survey was nine minutes.

Partnering with the Chamber of Commerce in Marathon County, 975 Chamber of Commerce members (business owners and managers) were sent an e-mail asking them to take the online survey as it was determined this was the most readily available and reliable source of business contact information in the County. Consequently, businesses not part of the Chamber of Commerce were not included in this survey request and could have significantly different availability of broadband internet access. The Chamber covers business generally in the Wausau urban corridor and therefore would not be representative of businesses in the outlying areas of the County. The request from the Chamber was contained in two separate e-mails – one on July 13, 2009 and one on July 20, 2009. One hundred and forty-seven (147) email recipients started the survey with ninety-one (91) completing it. The response rate was therefore just under ten (10) percent. The completion rate was over sixty-two percent of those who started the survey.

**Chart 1**



The following results were obtained from the online survey. Please note that the numbers on the following charts are the number of the respondents unless followed by the “%” symbol.

## Survey Results

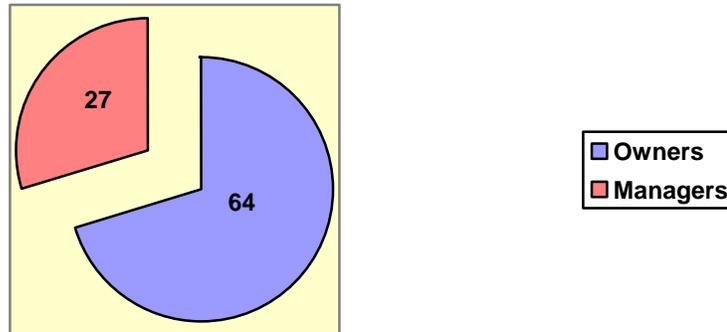
Respondents were asked in Question #1 if they were the business “owners” or “managers.” This question was asked in order to verify direct knowledge of the business. It was important to have business “owners” or “managers” complete the survey versus

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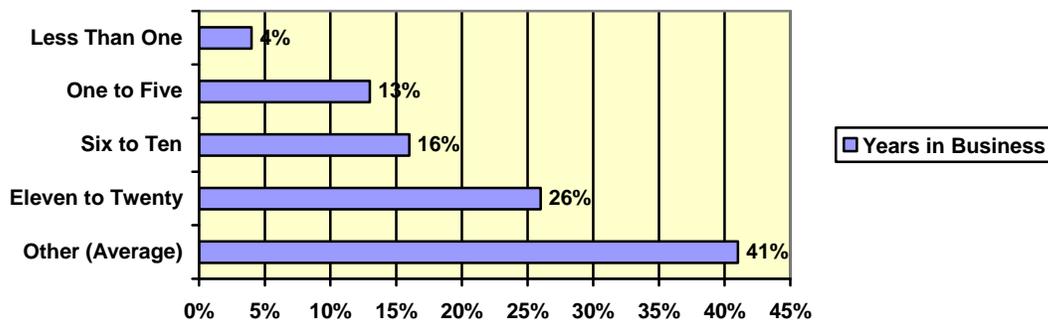
the survey being completed by other employees who might not have direct knowledge of the businesses' operations and Internet service provider(s). Sixty-four (64) respondents answered that they were the "owners" of the business and twenty-seven (27) responded that they were the "managers."

Chart 2



Question #2 asked "How long has the business been in existence?" This question was designed to gauge the experience of the business "owner" or "manager" in the operations of the business. Only four (4) percent answered they had been in business "less than one year" while the majority, over forty (40) percent (or thirty-six respondents), answered they had been in business over twenty years. The periods of time provided by the write-in response ranged from twenty-one (21) years to one hundred and forty-one years (141), with an average length of business of over forty-five (45) years for the write-in respondents or over forty (40) percent of the respondents. Therefore most of the businesses that responded are mature business organizations.

Chart 3



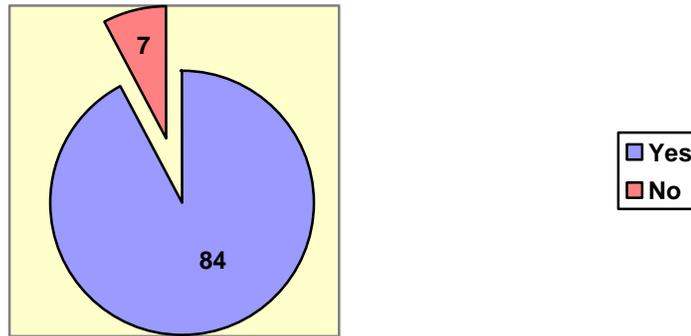
The respondents were then asked if their business had a website. Over ninety-one (91) percent or eighty-four (84) responded they did, while only seven (7) answered they did not.

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Chart 4

Question #3—Does your business have a website?

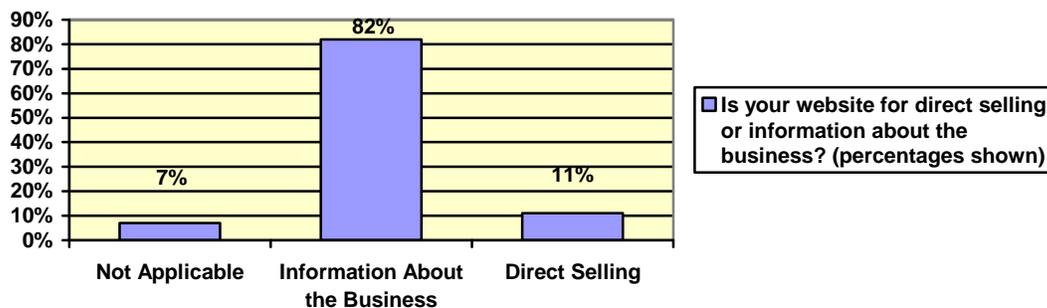


Question #4 asked the respondents to provide us with the URL addresses for their websites. Seventy-four (74) participants did so.

Respondents were then asked in Question #5: “Is your website for direct selling or is it for information about your business?”

Eighty-nine (89) respondents answered this question. Eleven (11) percent reported that they used the website for direct selling and eighty-two (82) percent reported they used their websites for information about the business. Almost seven (7) percent answered “not applicable.” For at least eleven (11) percent of the businesses, there website was critical as it was used for direct selling of products.

Chart 5



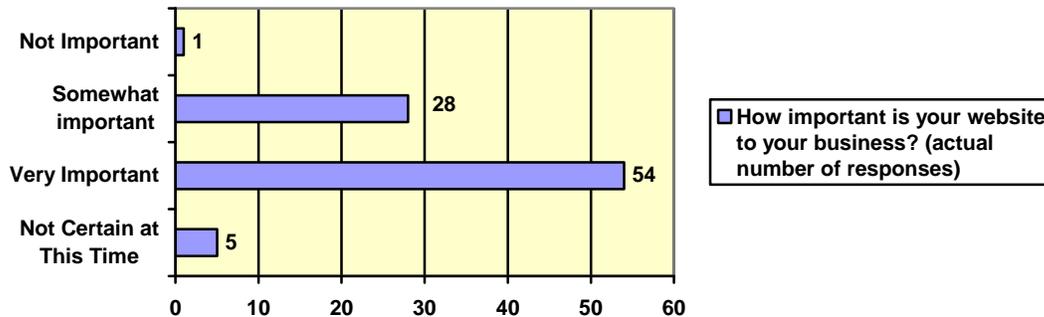
Question #6 asked how important the website was to the business. Eighty-eight (88) respondents answered this question. Only one (1) respondent answered that their

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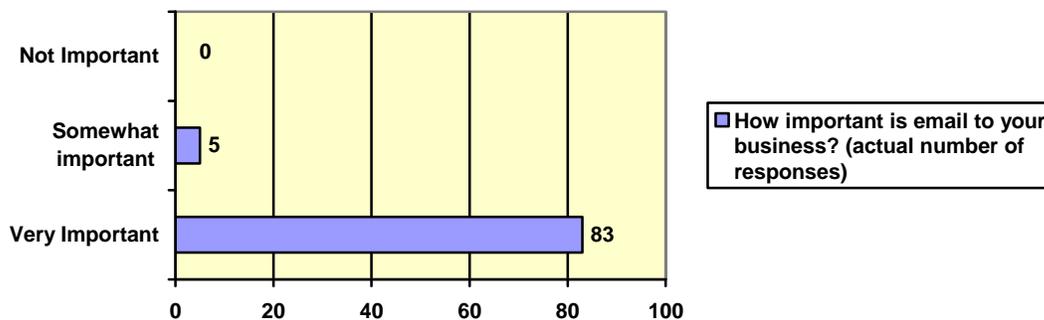
website was not important. Fifty-four (54) respondents (or over sixty-one (61) percent) answered that it was very important to their business and when coupled with the somewhat important category results in over ninety-three (93) percent responding that their website was important. Five (5) respondents or roughly five (5) percent answered they were “not certain at this time

**Chart 6**



The next question (Question #7) mirrors #6 in that it asks “How important is email to your business?” Again, eighty-eight (88) respondents answered this question. No respondent gave “Not important as an answer.” Just over five (5) percent ranked email as “Somewhat important” and over ninety-four (94) percent ranked email as “Very important” to their business. As was the case for a business’ website, e-mail is important to the businesses.

**Chart 7**



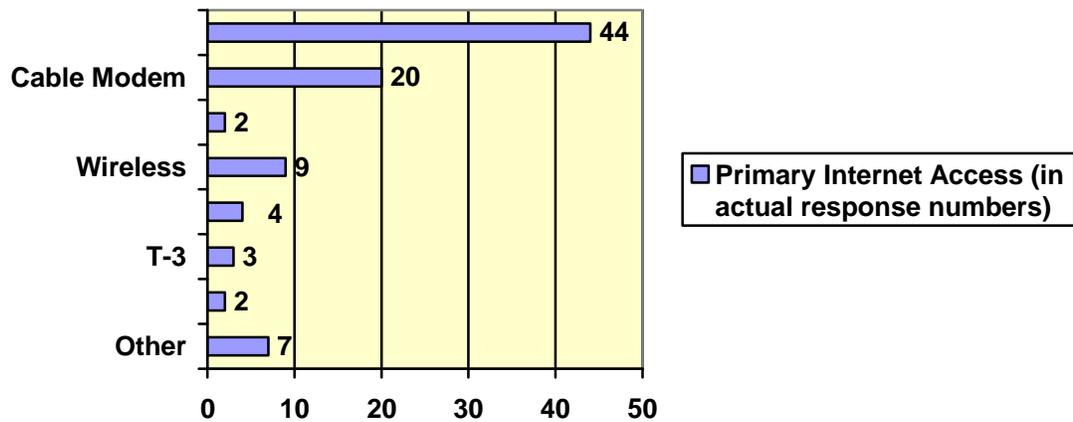
Question #8 asks respondents to provide the method they are using for “primary” Internet access. All ninety-one (91) respondents answered this question. No respondent answered that they were using “Dial Up.” The majority of respondents, or forty-four (44), answered they were using “DSL, Digital Subscriber Line.” Twenty (20) answered they used “Cable Modem” and a total of seven (7) answered they were using either T-1 or T-3 connections. Only two (2) respondents indicated they were unsure what their primary internet connection was. With the businesses that responded to the survey being

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primarily located in the Wausau urban corridor, it was not surprising that with cable and telephone company robust services being offered in this urban area, that most respondents would have DSL or cable modem connections.

Chart 8



For Question #8, respondents were also given the option of using “Other” as a response and then writing in an answer. These are the answers written in by the respondents:

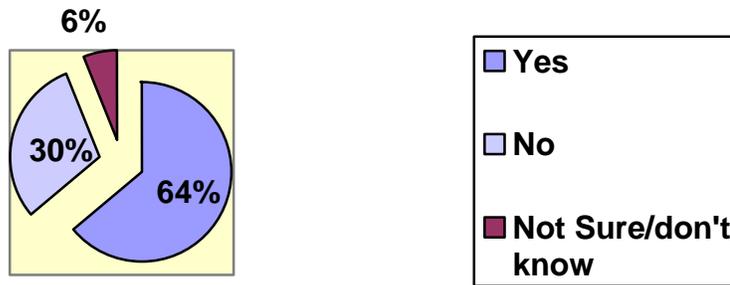
- 40MB
- We are on the County's connection
- Hughes Net
- Charter Fiber CBN
- charter fiber
- FiberOptic
- Fiber

Respondents were then asked if they had another choice of an Internet service provider (Question #9). Ninety-one (91) respondents answered this question, with sixty-four (64) percent (or fifty-eight (58) respondents) answering they did and approximately thirty (30) percent (or twenty-seven (27) respondents) saying they did not. Over six (6) percent answered “Not sure/don’t know.”

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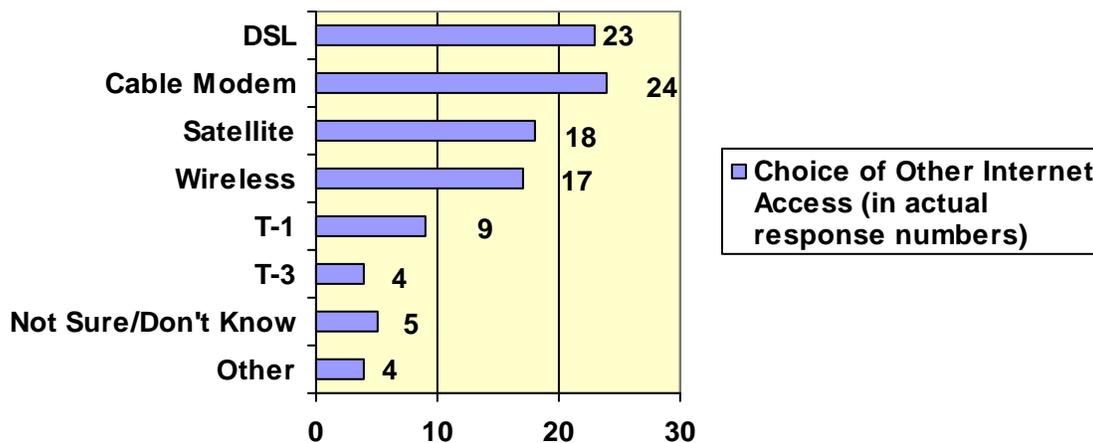
Chart 9

Do you have a choice of ANOTHER internet access provider at your business?



Question #10 requested that those who answered “Yes” to the previous question to indicate what other kinds of Internet service providers were available at their business location. The responses were as follows:

Chart 10



Four respondents answered “Other.” Those who answered “Other” were given an opportunity to fill in their own response and did so as follows:

- Higher Bandwidth
- Verizon
- dial-up

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Respondents were also asked to provide the name of the company that provided their primary Internet service (Question #11). All ninety-one (91) respondents completed this question. Only two (2) respondents did not know which company provided their primary internet service.

**Table 1**

Charter Cable	<b>28</b>	<b>30.43%</b>
Verizon	<b>26</b>	<b>28.26%</b>
AirRunner Networks	1	1.09%
HughesNet	2	2.17%
Solarus	<b>10</b>	<b>10.87%</b>
AirNet/Network Professionals	4	4.35%
Network Professionals (DSL)	4	4.35%
Not sure/don't know	2	2.17%
Other	<b>15</b>	<b>16.30%</b>

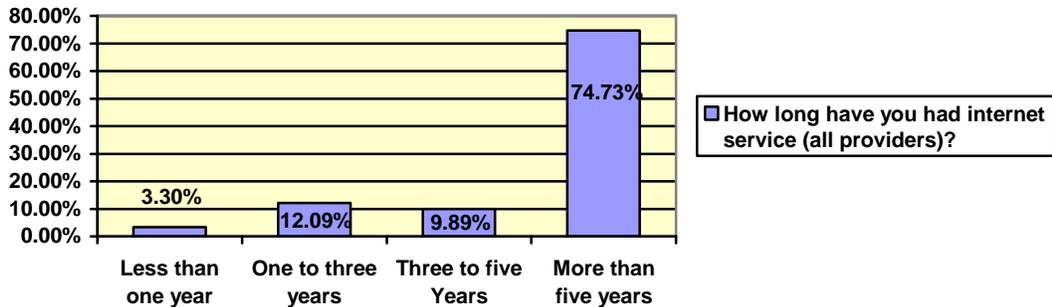
Fifteen (15) of these respondents chose “Other” as their answer and were provided an opportunity to write in their primary Internet service provider. Thirteen (13) wrote in their responses as follows:

- AT&T (3 respondents)
- TDS Telecom
- COVAD
- Network Professionals (Wireless)
- DirecTV
- Through our corporate office
- Netnet out of wittenberg telephone company
- Global Crossing
- TDS
- Sprint
- WiscNet

Question #12 asked respondents how long they have had Internet service, including all providers that they have used. Ninety-one (91) respondents answered this question with over seventy-four (74) percent indicating they had Internet service for over five (5) years.

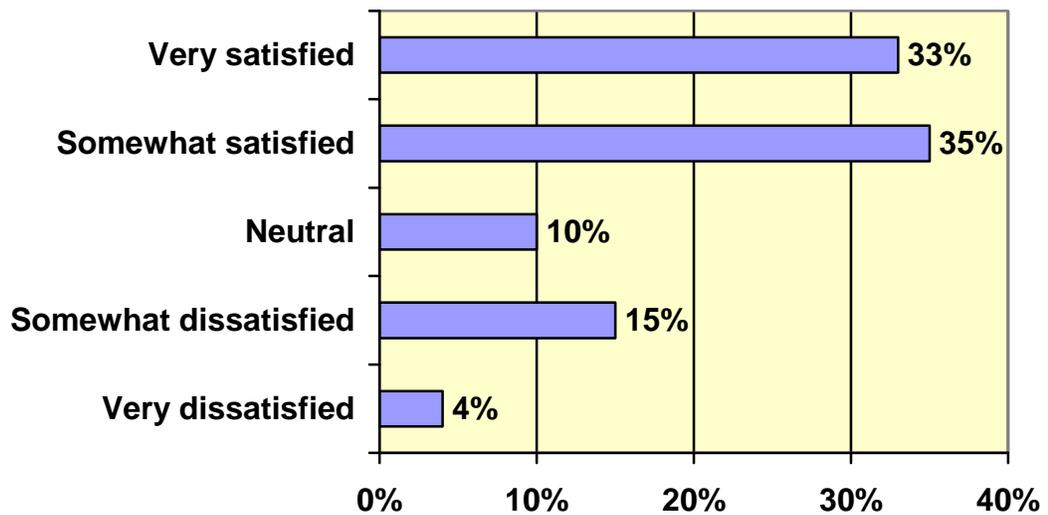
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Chart 11



Respondents were then asked to rate their satisfaction level with their providers. All ninety-one (91) respondents answered this question (Question #13). Over seventy (70) percent indicated that they were “Very satisfied” or “Somewhat satisfied,” while over nineteen (19) percent indicated that they were “Somewhat dissatisfied” or “Very dissatisfied.” Almost ten (10) percent (nine (9) respondents) indicated they were “Neutral.”

Chart 12



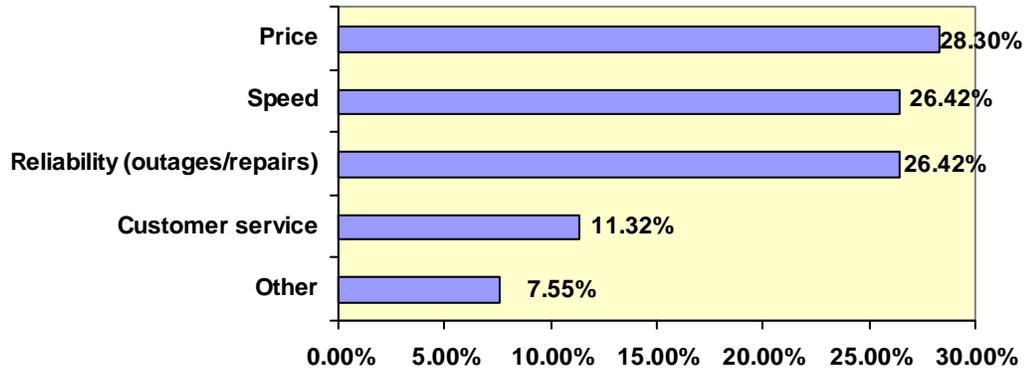
Question #14 asked those respondents who had indicated that they were “Somewhat dissatisfied” or “Very dissatisfied” to provide an explanation for their dissatisfaction. Respondents were asked to “check ALL that apply” because each respondent was capable of selecting multiple answers.

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While eighteen (18) respondents, or nineteen (19) percent, chose the answer “Somewhat dissatisfied” or “Very dissatisfied,” there were fifty-seven (57) total responses to Question #14 (fifty-three (53) chose the options provided and four (4) chose to answer “Other” and fill in all of their reasons for dissatisfaction). The results show that price, speed and reliability were equally important reasons for dissatisfaction. The responses are as follows:

**Chart 13**



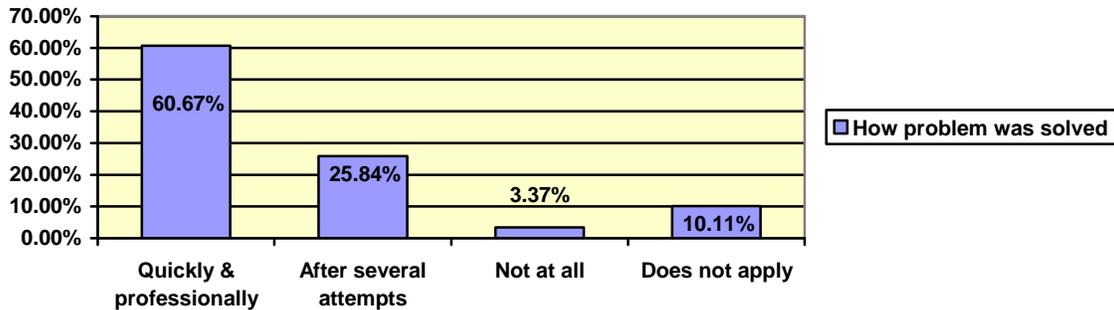
The four (4) narrative responses to Question #14 (“Other”) were:

- Verizon refuses to turn on Fiber!
- Hard to reach business service area.
- They are not forced to be competitive.
- Have had many connection interruptions within the new office and the system is quite slow.

Respondents were then asked in Question #15, “If you had a problem with your service, was the problem solved:” and given a choice of four (4) responses. Eighty-nine (89) respondents answered this question as follows:

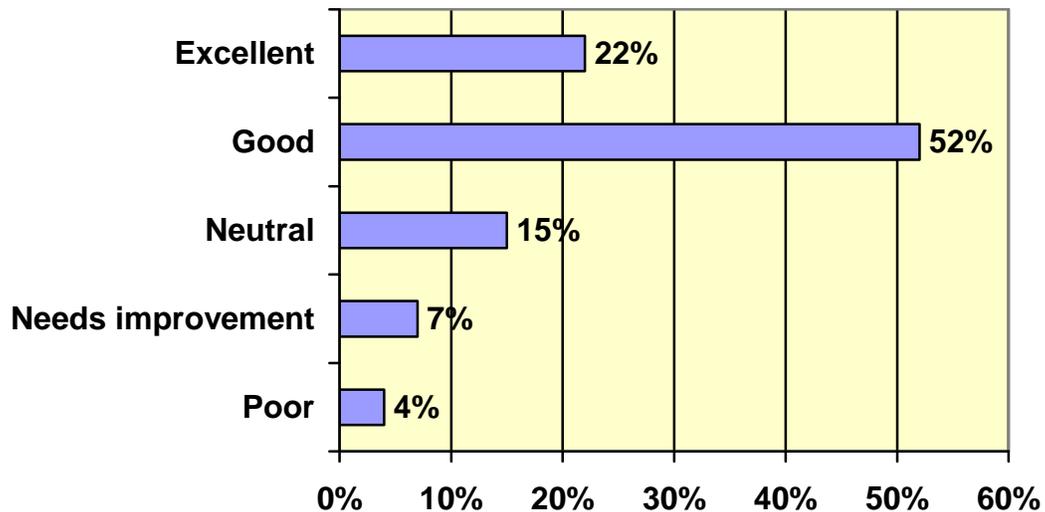
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Chart 14



Question #16 asks respondents to rate their Internet service provider. Ninety-one (91) respondents answered this question with over seventy-four (74) percent of those rating their Internet service provider as “Good” to “Excellent.” Only eleven (11) percent felt their Internet service provider “Needs improvement” or was “Poor,” while fifteen (15) percent reported being “Neutral” about their Internet service provider.

Chart 15

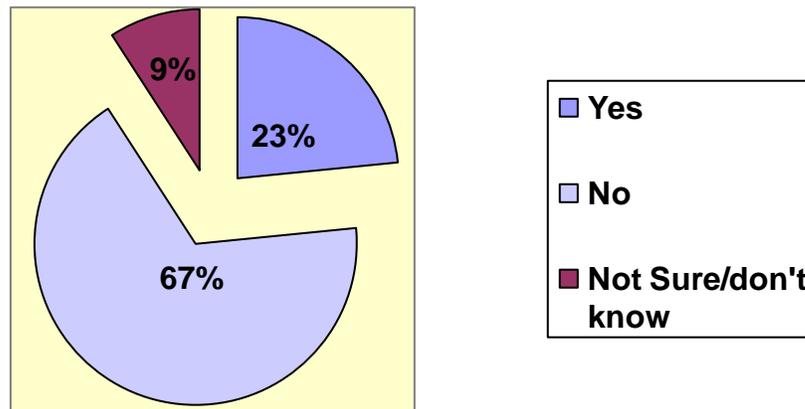


Respondents were then asked if there were some things that they would like to do on the Internet that they were unable to do currently or were frustrated with, because of the services provided by their current Internet service provider (Question #17). Ninety-one (91) respondents answered this question. Of those ninety-one (91) respondents, sixty-seven (67) percent responded “No” and twenty-three (23) percent responded “Yes.” Over nine (9) percent answered “Not sure/don’t know.” This again reinforces that there is a significant group of businesses that are not able to use the internet efficiently.

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Chart 16

**Are there some things that you would like to do on the internet that you are unable to do currently or are frustrated with, because of the services provided by your current service provider?**



Those who answered “Yes” to Question #17 were asked to check off a list of possible activities that they would like to perform on the Internet that they are currently unable to do or were frustrated doing using their current Internet service (Question #18). There were fifty-one (51) checked responses and two (2) narrative responses (“Other”) as follows:

**Table 2**

Sell products or services online (transactions)	4	7.8%
Video conferencing	<b>11</b>	<b>21.6%</b>
Presentations	5	9.8%
Online marketing	2	3.9%
Transmit large files and/or videos to customers	<b>16</b>	<b>31.4%</b>
Provide online courses/training	4	7.8%
Allow employees to take online courses/training	3	5.9%
Allow employees to telecommute	4	7.8%
Other (please explain below)	2	3.9%
<b>Total</b>	<b>51</b>	<b>100.0%</b>

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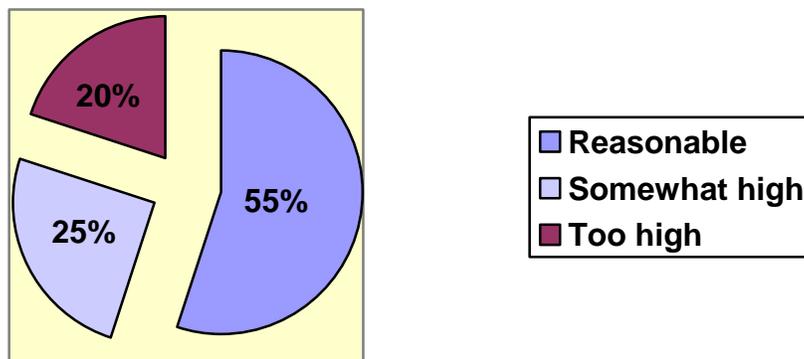
- moving large files is a total utter joke on DSL or Cable, nothing LESS the [sic] Fiber (Fios) is even worth consideration. wireless is barely better then dial up, just DON" T DO IT ! NO NO NO ! its a waste of time and money instead of pulling fiber and doing it right the first time. no band aid solutions. everyone knows that pulling fiber to the house is what really needs to be done, lets just do it. its time to open the area up to COMPETITION rather than just letting verizon have the monopoly in service. once that would happen, it would finally get done. don't back down. again, wireless net won't cut it, most folks will not take its inferior service over getting proper and REAL high speed access.
- We would like a WIFI connection inside the building for visitors/vendors/employee laptops.

Question #19 asked respondents to provide how much per month they pay for their primary Internet service. Sixty-eight (68) respondents answered with a dollar amount of how much they pay, while five (5) responded with a question mark or “don’t know” as a response, and one (1) responded they traded Internet service for “tickets.” Reported monthly fees varied greatly, from a low of \$28.00 per month to a high of \$10,000.00 per month. The average expenditure for the sixty-eight (68) respondents that gave a dollar amount is \$382.00 per month.

When asked if the respondents thought the price was reasonable (Question #20), fifty-five (55) percent thought what they paid was “Reasonable,” while twenty-five (25) percent thought that it was “Somewhat high” and twenty (20) percent that the price was “Too high.”

Chart 17

## Price of Service



The next question asked the respondents to indicate how much more they would be willing to pay for internet service if they could get a “significantly higher connection

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speed” (Question #21). Seventy-three (73) respondents chose one of the provided answers and eleven (11) respondents chose “Other” with all eleven (11) providing a narrative response.

**Table 3**

If you could get a significantly HIGHER CONNECTION SPEED, how much more would you be willing to pay for your internet service?		
0-10%	<b>57</b>	<b>67.9%</b>
11-25%	13	15.4%
26-50%	2	2.4%
more than 50%	1	1.2%
Other (please explain below)	11	13.1%
<b>Total</b>	<b>84</b>	<b>100.0%</b>

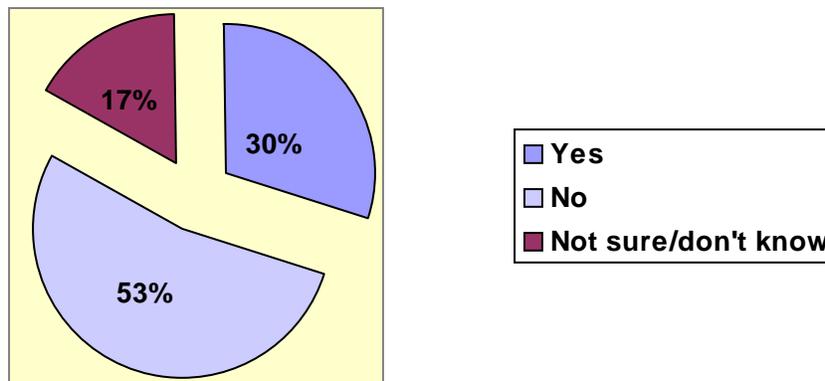
- Already available but we choose level of service vs cost.
- Couldn't get much higher than T1 speed.
- Prices here in CW are much higher than they should be. I just priced out a T3 at our offices one block from Verizon and it was over \$6700, the same T3 in our Green Bay offices has a price of only around \$2700. Both prices are from AT&T the difference is the last mile price from Verizon in Wausau.
- Prices need to be lowered.
- The price should be lower than what I am paying and it should include higher speed.
- Speed is fine now.
- Fiber is far more cost effective and not overpriced like DSL.
- I would not pay more than what I pay currently! \$89? This is silly when charter/verizon/solaris [sic] have faster speeds for less money!
- Higher speeds should be able to be provided at the same or lower costs. Due to economy of scale.
- Should be less compared to other services.
- I don't make the decisions with the billing.

Next, respondents were asked if they had a higher speed would that enable them to expand or grow their business (Question #22). Ninety (90) respondents answered this question. Fifty-three (53) percent (or forty-eight (48) respondents) answered “No” while only thirty (30) percent (or twenty-seven (27) respondents) answered “Yes.”

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Chart 18



Respondents who answered “Yes” to Question #22, were then asked what they thought a higher connection speed would help them do (Question #23). Respondents were given the option of checking all that applied. Sixty-seven (67) responses were chosen from the provided list and three (3) responses were “Other” with attendant narrative responses. It is noteworthy that thirty (30) percent believe they could expand or grow their business with a higher internet speed.

Table 4

If YES what do you think a HIGHER CONNECTION SPEED would help you do (check ALL that apply):

Increase sales	12	17.1%
Increase the number of customers	9	12.9%
Offer more products/services	9	12.9%
Increase productivity	21	30.0%
Hire more staff	0	0.0%
Manage inventory more efficiently	4	5.7%
Speed up order fulfillment	12	17.1%
Other (please explain below)	3	4.3%
<b>Total</b>	<b>70</b>	<b>100.0%</b>

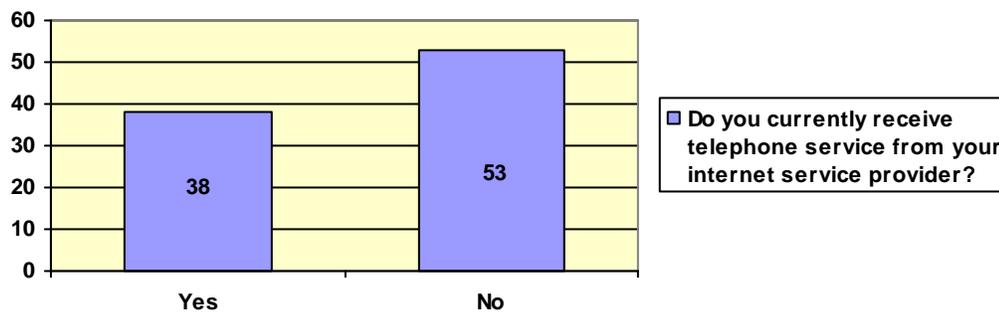
- in house class in different software applications branch office connections
- If the county were to act they should de-regulate the business so there ISN'T a govt run program but allow other companies like Comcast, etc. to come in and compete for Fiber!

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- The frustration of losing connection or slow files makes everything harder. Even on a Sunday morning, I have had web access fail 5 or 6 times today. I had wasting time.

Question #24 asked respondents if they also received telephone service from their Internet service provider. Ninety-one (91) respondents answered this question with thirty-eight (38), or forty-two (42) percent answering “Yes” and fifty-three (53), or fifty-eight (58) percent answering “No.”

**Chart 19**



The next question (Question #25) asks those receiving telephone service from their Internet service provider whether they receive a discount on those bundled services. There were fifty (50) responses to this question (more than had responded “Yes” in the previous question). Forty-four (44) percent responded they did receive a discount for these bundled services while thirty (30) percent responded they did not receive a discount and twenty-six (26) percent responded “Not sure/don’t know.”

**Table 5**

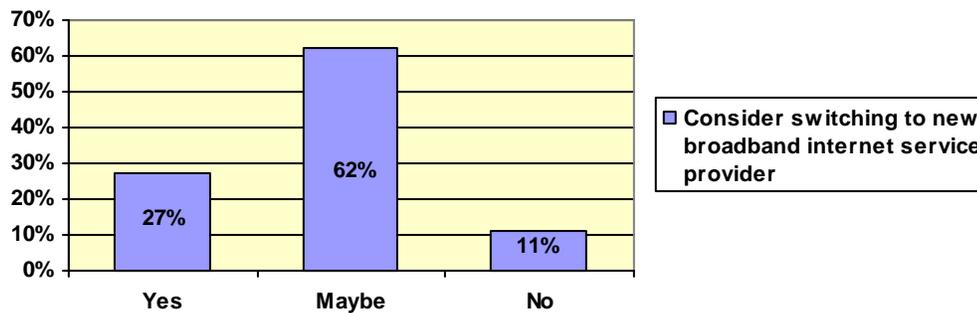
If you receive TELEPHONE service from your internet service provider, do you receive a discount for those bundled services?

Yes	22	44.0%
No	15	30.0%
Not sure/don't know	13	26.0%
<b>Total</b>	<b>50</b>	<b>100.0%</b>

Respondents were then asked “If there were a new broadband internet service provider available to you (either public or private service provider), would you consider switching your service to that provider?” (Question #26). Eighty-nine (89) percent answered “Yes” or “Maybe.” This suggests a real opportunity for a new entrant if price, speed and reliability could be improved.

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Chart 20



When those who answered “Yes” or “Maybe” to Question #26 were asked what would cause them to switch their service to a new provider (Question #27) and given an opportunity to “check all that apply,” they provided two hundred and forty-four (244) responses. Price was the most chosen response at over thirty (30) percent, with Speed and Reliability ranking twenty-five (25) and twenty-two (22) percent respectively.

Table 6

If you answered YES or Maybe what would cause you to switch your internet service (check ALL that apply)?

Price	74	30.3%
Speed	61	25.0%
Reliability	54	22.1%
Customer Service	48	19.7%
Other (please explain below)	7	2.9%
<b>Total</b>	<b>244</b>	<b>100.0%</b>

Respondents who answered “Other” to Question #27 provided the following narrative comments.

- Rather than Govt getting involved try 'de-regulating' and allow a whole bunch of providers in the market. The County is broke and so is the fed, stop worrying about the private sector and allow them to do what they need to do. Read my lips: DE-REGULATE AND ALLOW A BUNCH OF OTHER PROVIDERS IN!
- My business is in Wausau but my home is in the town of Hewitt (east of town). I do not have internet access other than dial up to my home which precludes me from doing business at home.
- Access to Verizon "people" is horrible.
- If the county were to act they should de-regulate the business so there ISN'T a govt run program but allow other companies like Comcast, etc. to come in and compete for Fiber!

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- ...and more speed. We're trying to implement on-line ticketing and upload speed is crucial to its success.
- My other side is Wausau Whitewater and the internet connections are even more critical. As the use of the Internet goes, we get requests to live stream events and competitions. We use charter on the river but it is not a strong enough connection. I am considered a satellite for that use.
- It would be up to the president of the company.

The final questions of the survey were to gather demographic and economic information about the businesses. Question #28 asked respondents to identify the type of business they own or manage. Ninety-one (91) respondents answered this question using the answers that were provided and fourteen (14) answered "Other" and provided a narrative response.

**Table 7**

## What kind of business is this?

• Agricultural & agricultural services	1	1.1%
• Construction	3	3.3%
• Manufacturing	13	14.3%
• Wholesale Trade	2	2.2%
• Retail Trade	4	4.4%
• Finance & Insurance	7	7.7%
• Real estate & rental & leasing	4	4.4%
• Professional, scientific & technical services	<b>14</b>	<b>15.4%</b>
• Service & repair	4	4.4%
• Management of companies & enterprises	0	0.0%
• Information	3	3.3%
• Transportation & warehousing	3	3.3%
• Administrative & support	0	0.0%
• Waste management & remediation	1	1.1%
• Educational services	1	1.1%
• Health care, social assistance & care giving	8	8.8%
• Arts, entertainment & recreation	4	4.4%
• Accommodations & food service	5	5.5%
• Other (please explain below)	14	15.4%
<b>Total</b>	<b>91</b>	<b>100.0%</b>

- Consulting
- HVAC
- Information Technologies, Web-Programming, Video Production
- Video production, motion graphics, visual effects, web development
- Electrical and technology contractor

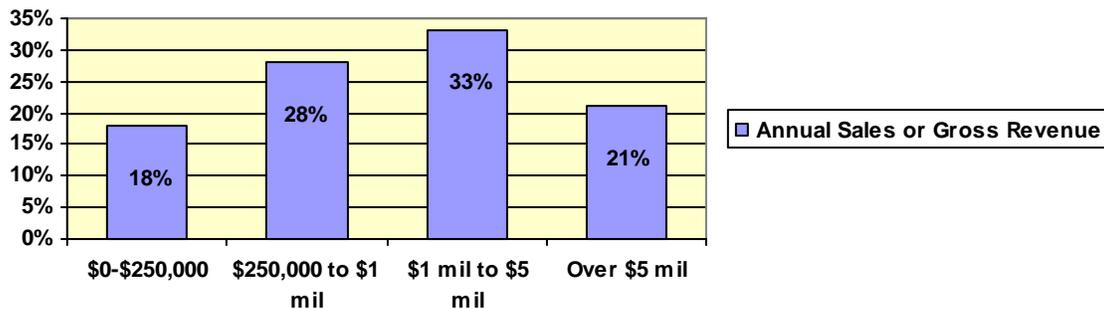
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- Radio Stations
- Mailing service
- Motor Efficiency Consultants
- Herbal based supplements
- Consulting engineering firm
- Printing & Document services
- Marketing/ Web Programming/Video Production
- Non-profit community center
- Non profit organization

Eighty-nine (89) respondents provided their annual sales or gross revenue (Question #29).

**Chart 21**



Ninety (90) respondents provided the number of full-time employees (Question #30). The combined total of full-time employees for these ninety (90) respondents was ten thousand five hundred and three (10,503) for an average of over one hundred and sixteen (116) full-time employees per business.

Eighty-five (85) respondents provided the number of part-time employees (Question #31). The combined total of part-time employees for these eighty-five respondents was Sixty three thousand five hundred and eighty-five (63,585) for an average of seven hundred and forty-eight (748) part-time employees per business.

We also plotted on a map the city location of each of the ninety-one (91) respondents which is attached as Exhibit 2 to this Report. Of the ninety-one (91) respondents, eighty-one (81) were in the urban triangle of Wausau to Mosinee to Weston.

## Conclusions

Our overall conclusion is that most of the respondents are currently able to access broadband Internet services at their businesses. Forty-four (44) respondents had DSL,

# Marathon County Business Community Broadband Access Survey Report

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twenty (20) had cable modem service and seven (7) had either a T-1 or T-3 line. In other words, almost eighty (80) percent had access to broadband as defined by the NTIA.<sup>3</sup>

Having said that, this survey generally elicited responses from the urban triangle from Wausau to Mosinee to Weston as approximately ninety (90) percent of the respondents were in this urban triangle. Therefore, access to broadband Internet services outside this urban triangle should not be assumed to be represented by this survey. Also the survey found that approximately thirty (30) percent of the businesses were unable to do everything they wished, were dissatisfied with current services, or felt they could expand if a better internet connection was available.

We found several interesting observations included in the responses:

1. Eighty-two (82) percent of the respondents said that their websites were for general information about the business (Question #5). If these businesses move to more on-line selling and ordering, their Internet connection speed may become a hindrance;
2. Ninety-four (94) percent ranked email as very important to their business (question # 7). As email usage continues to grow in absolute amount and the size of attachments increase, slower Internet connections speeds may impact this critical business need;
3. Not one of the respondents identified “dial-up” as their Internet connection (Question #8). This is very insightful with regards to other areas of the County where “dial-up” is the only choice for a terrestrial Internet connection. This could be a huge impediment to new economic development in these “dial-up” areas;
4. Charter, Verizon and Solarus were the vast majority of the of the Internet service providers to the respondents (Question #11). Here again, because the respondents were centered in the urban triangle, this was not surprising but may well be very different in the outlying areas of the County;
5. Over seventy (70) percent of the respondents indicated they were “neutral” to “very satisfied” with their internet service provider (Question #13). At least with respect to the urban triangle, such high marks for the current providers may make it difficult to have these businesses switch unless these current providers do not continue to meet their speed and price needs;
6. Price, speed and reliability were the biggest reasons for dissatisfaction with the current providers (Question #14). This can be a real opportunity

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<sup>3</sup> The NTIA standard for “broadband” is at least 768 kbps downstream and 200 kbps upstream.

# Marathon County Business Community Broadband Access Survey Report

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for another provider to entice the respondents away from the current providers if they could improve on one or more of these reasons;

7. Twenty-three (23) percent of the respondents said that there were things that they wanted to do but could not because of their existing Internet connection (Question #17). The most common responses were the inability to do video conferencing and transmitting large files (Question #18). If the business community moves towards the used of web-based services, video conferencing and transmitting large files will become more important;
8. Not surprisingly, almost seventy (70) percent of the respondents would be willing to pay up to ten (10 percent more for a higher connection speed (Question #21). This indicates that speed may actually be more important than price to a degree;
9. While only thirty (30) percent of respondents indicated that a higher connection speed would enable them to expand or grow their business (Question #22), that number indicates that economic development is directly impacted by Internet connection speeds. The much higher “No” response may also be impacted by the current economic condition; and
10. The response to Question #26 was surprising in that eighty-nine (89) percent of respondents would consider switching providers if another one was available. This is somewhat contradictory to the fact that seventy (70) were “neutral” to “very satisfied” with their current provider (Question #13) with respect price, speed and reliability being the important factors that they would consider (Question #27).



## MARATHON COUNTY BROADBAND ACCESS SURVEY FOR BUSINESS OWNERS AND MANAGERS

**Hello:**

Marathon County is conducting a county-wide broadband gap analysis to identify the county-wide issues related to economical broadband access and telecommunications for businesses and residents.

As part of that analysis, we are conducting a survey of County business owners' and managers' opinions. This survey will help us understand County businesses' broadband (internet) needs and interests, currently and for the future.

We estimate the total time to complete this survey is five to ten minutes.

Your survey responses will be strictly confidential and data from this research will be reported only in the aggregate.

Thank you very much for your time and support.

**Brad Karger**  
County Administrator

Please start with the survey now by clicking on the Continue button below.

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Please contact [info@riedelcommunications.com](mailto:info@riedelcommunications.com) if you have any questions regarding this survey.

POWERED BY  
 QuestionPro



Questions marked with a \* are required



100%

**MARATHON COUNTY BROADBAND ACCESS SURVEY FOR BUSINESS OWNERS AND MANAGERS**

**1. Are you the business OWNER or MANAGER?**

- Owner
- Manager

---

**2. How long has the business been in existence?**

- Less than 1 year
- 1-5 years
- 6-10 years
- 11-20 years
- Other

---

**3. Does your business have a website?**

Yes

No

---

**4. Please provide us with the URL (website address)**

---

**5. Is your website for direct selling or is it for information about your business?**

Direct selling

Information about the business

Not applicable

---

**6. How important is your website to your business?**

Not important

Somewhat important

Very important

Not certain at this time

---

**7. How important is email to your business?**

Not important

Somewhat important

Very important

---

**8. Our primary internet access is:**

- Dial Up
  - DSL (Digital Subscriber Line)
  - Cable Modem
  - Satellite
  - Wireless
  - T-1
  - T-3
  - Not sure/don't know
  - Other
- 

**9. Do you have a choice of *ANOTHER* internet access provider at your business?**

- Yes
  - No (please skip the next question)
  - Not sure/don't know (please skip the next question)
- 

**10. If you answered "Yes" what *OTHER* internet access service do you have a choice of at your business (check ALL that apply)?**

- DSL (Digital Subscriber Line)
  - Cable Modem
  - Satellite
  - Wireless
  - T-1
  - T-3
  - Not sure/don't know
  - Other
- 

**11. Who is your primary internet service provider?**

- Charter Cable
  - Verizon
  - AirRunner Networks
  - HughesNet
  - Solarus
  - AirNet/Network Professionals
  - Network Professionals (DSL)
  - Not sure/don't know
  - Other
-

**12. How long have you had internet service (all providers)?**

- Less than 1 year
  - 1-3 years
  - 3-5 years
  - More than 5 years
- 

**13. How satisfied are you with your primary internet service provider?**

- Very satisfied (please skip the next question)
  - Somewhat satisfied (please skip the next question)
  - Neutral (please skip the next question)
  - Somewhat dissatisfied
  - Very dissatisfied
- 

**14. If you answered SOMEWHAT DISSATISFIED or VERY DISSATISFIED to the last question, is it because of (check ALL that apply):**

- Price
  - Speed
  - Reliability (outages/repair)
  - Customer service
  - Other (please explain below)
- 

**15. If you had a problem with your service, was the problem solved:**

- Quickly and professionally
  - After several attempts
  - Not at all
  - Does not apply
- 

**16. Do you consider your internet service provider to be:**

- Excellent
  - Good
  - Neutral
  - Needs improvement
  - Poor
-

**17. Are there some things that you would like to do on the internet *that you are unable to do currently or are frustrated with*, because of the services provided by your current internet service provider?**

- Yes
  - No (please skip the next question)
  - Not sure/don't know (please skip the next question)
- 

**18. If you answered "Yes" to the last question, what are some things you would like to do on the internet that you cannot do now (check ALL that apply)?**

- Sell products or services online (transactions)
  - Video conferencing
  - Presentations
  - Online marketing
  - Transmit large files and/or videos to customers
  - Provide online courses/training
  - Allow employees to take online courses/training
  - Allow employees to telecommute
  - Other (please explain below)
- 

**19. Approximately, how much per month do you pay for your primary business internet service?**

---

**20. Do you think that the price is:**

- Reasonable
  - Somewhat high
  - Too high
-

**21. If you could get a significantly HIGHER CONNECTION SPEED, how much more would you be willing to pay for your internet service?**

- 0-10%
  - 11-25%
  - 26-50%
  - more than 50%
  - Other (please explain below)
- 

**22. Do you believe that if you could get a HIGHER CONNECTION SPEED you could expand or grow your business?**

- Yes
  - No (please skip the next question)
  - Not sure/don't know (please skip the next question)
- 

**23. If "YES" what do you think a HIGHER CONNECTION SPEED would help you do (check ALL that apply):**

- Increase sales
  - Increase the number of customers
  - Offer more products/services
  - Increase productivity
  - Hire more staff
  - Manage inventory more efficiently
  - Speed up order fulfillment
  - Other (please explain below)
- 

**24. Do you currently receive Telephone service from your internet service provider?**

- Yes
  - No
-

**25. If you receive TELEPHONE service from your internet service provider, do you receive a *discount* for those bundled services?**

- Yes
  - No
  - Not sure/don't know
- 

**26. If there were a new broadband internet service provider available to you (either public or private service provider), would you consider switching your service to that provider?**

- Yes
  - Maybe
  - No
- 

**27. If you answered "YES" or "Maybe" what would cause you to switch your internet service (check ALL that apply)?**

- Price
  - Speed
  - Reliability
  - Customer Service
  - Other (please explain below)
- 

**28. What kind of business is this?**

- Agricultural & agricultural services
- Construction
- Manufacturing
- Wholesale Trade
- Retail Trade
- Finance & Insurance
- Real estate & rental & leasing
- Professional, scientific & technical services
- Service & repair
- Management of companies & enterprises
- Information
- Transportation & warehousing
- Administrative & support
- Waste management & remediation
- Educational services
- Health care, social assistance & care giving

Arts, entertainment & recreation

Accommodations & food service

Other (please explain below)

---

**29. Please provide the following information about the business:**

**Annual sales or gross revenue:**

Under \$250,000

\$250,000 to \$1,000,000

\$1,000,000 to \$5,000,000

Over \$5,000,000

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**30. How many full-time employees do you have?**

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**31. How many part-time employees do you have?**

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**Contact Information (questions marked with red \* are required)**

**32. Name :**

**Title :**

**Name of Business**

**\* :**

**Address :**

**City \* :**

**State \* :**

**Zip \* :**

**Phone :**

**Email Address :**

Please contact [info@riedelcommunications.com](mailto:info@riedelcommunications.com) if you have any questions regarding this survey.

