Pierce County Broadband Internet Survey

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Staff and students working for the Survey Research Center at UW-River Falls were instrumental in the completion of this study. We would like to thank Denise Parks, Shelly Hadley, Caleb Riedeman, Christine Leiby, Kaylin Spaeth, Katrina Barrett, Bryce Krull, and Rosie Krum. We gratefully acknowledge their hard work and dedication.

The SRC would also like to thank Jessica Lansing from Pierce Pepin Cooperative Services for her work on the GIS analysis and maps. We extend a special thanks to Jeff Olson from Pierce Pepin Cooperative Services for his valuable guidance and input throughout the project.

Finally, we would like to thank the Pierce County residents and business owners who took time to complete their questionnaires.
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Executive Summary

The purpose of this survey was to learn the current extent of broadband service in Pierce County and determine opportunities for Pierce County residents and businesses. In March 2014, the Ellsworth Industrial Council mailed the survey to all 19,623 residential and business addresses in Pierce County. The number of households in Pierce County is estimated to be 15,190, and the total number of businesses is estimated to be 4,433.

The Ellsworth Industrial Council chose to have the Survey Research Center at the University of Wisconsin-River Falls tabulate and analyze the data.

The survey was divided into two sections, one section each for households and for businesses. 2,022 respondents answered the household questions (13% response rate). The “margin of error” for household responses is ±2%. 723 respondents answered the business questions (16% response rate). The “margin of error” for the business responses is ±3.25%.

Residential Broadband Questions.

Three-fourths of residential respondents said they have broadband/Internet service.

AT&T, Comcast, and CenturyLink have the most broadband residential customers, totaling about half of all subscribers.

Half of residential respondents said their monthly bill for broadband/Internet service is $51 to $100.

Over half of residential respondents said their provider requires a service agreement, and two-thirds reported their agreement length is two years.

Four in ten residential respondents are not sure about the upload speed or the download speed of their Internet connection, and half said they do not have a monthly limit on data use.

Half of residential respondents are unsatisfied or very unsatisfied with their current broadband/Internet provider.

AT&T has the largest share of landline telephone customers, followed by CenturyLink, and BEVCOMM.

Residential respondents believe faster speeds and greater reliability to be the top two benefits of a fiber optic broadband connection.
Business Broadband Questions.

Nearly all business respondents own their place of business. The largest portion of business respondents have five or less employees (half of business respondents preferred not to say how many people they employ).

A majority of business respondents purchase telephone service from their Internet provider.

The largest percentage of business respondents said their total monthly telecommunication budget is less than $100.

About a third of business respondents said they currently have a fiber optic connection, and a large majority of business respondents are interested in a fiber optic connection. Lower pricing is the largest concern among respondents who would be interested in a fiber optic connection.

Among the business respondents who said they do not have a broadband Internet connection, the primary reason was that they do not see a need. A substantial minority of business respondents cited lack of broadband Internet availability as the reason for not having broadband Internet service.
**Survey Purpose**

The purpose of this survey was to learn the current extent of broadband service in Pierce County and determine opportunities for Pierce County residents and businesses. The survey data were collected by the Ellsworth Industrial Council, which chose to work with the Survey Research Center (SRC) at the University of Wisconsin-River Falls to tabulate and analyze the data.

**Survey Methods**

In March 2014, the Ellsworth Industrial Council mailed surveys to all residential and business address in Pierce County. The total number of mailings was 19,623. The first nine questions in the survey were about residential broadband issues. Additionally, business owners/managers were asked to complete Question 10 through Question 18. Respondents were instructed to fold the completed survey to display the postage-paid business reply panel and place the completed survey in the mail. Completed surveys were addressed to Pierce Pepin Cooperative Services, which provided administrative assistance for the survey project. Completed surveys could also be dropped off at the Ellsworth Creamery, Pierce County Courthouse, or Pierce Pepin Cooperative Services. Surveys could also be downloaded from the Pierce County Internet website, completed and returned via email. There were 47 surveys completed via email. The Ellsworth Industrial Council chose to have the SRC enter the data, tabulate the results, and prepare a written report. A total of 2,067 completed surveys were delivered to the SRC. Because the United States Postal Service delivery process does not provide a separate count of residential addresses and business addresses, the SRC used published data from the US Census Bureau to estimate the number of households and the number of businesses in Pierce County. These estimates were used to calculate the response rates and confidence intervals (“margin of error”) from the household responses and from the businesses responses. 2,022 returned surveys contained responses to the residential questions. According to the US Census Bureau¹ American Community Survey, 2010-2012 there are 15,190 residential households in Pierce County. Thus, the calculated residential response rate is approximately 13%, and the results are expected to be accurate to within plus/minus 2.0%.

The business questions were completed on 723 returned surveys. The SRC assumes that the number of surveys delivered to businesses to be the difference between the total number of addresses in the USPS mailing (19,623) and the estimated number of households (15,190). Thus, the SRC estimates that about 4,433 businesses received the survey. This number generally aligns with the number of Pierce County businesses reported in the 2007 Survey of Business Owners (3,519). Therefore, the calculated business response rate is 16%. Based on the assumed 4,433 businesses, results from the business respondents are expected to be accurate to within plus/minus 3.25%.

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¹ US Census Bureau, American Community Survey, 2010-2012.
In most surveys, the Survey Research Center conducts a number of tests to determine the degree to which the sample represents the underlying population. The structure of the Pierce County Broadband Survey precludes these tests. Surveys need to consider the potential for “non-response bias,” which occurs when people who fail to respond to the survey have opinions that are systematically different from those who did respond. For example, one of the questions in the survey asked respondents about their overall satisfaction with their current Internet provider. If those who did not respond were more dissatisfied with their current provider, the estimates included in this report will overstate the satisfaction of residents with respect to their current Internet provider. A common way of testing for non-response bias is to send a second mailing to non-respondents and to compare the responses of those who returned their survey after the first mailing to those who returned their survey after the second mailing. The respondents to the second mailing are, in effect, a sample of non-respondents and are assumed to better represent the opinions of those who did not complete their survey. Since this survey consisted of a single mailing, the SRC was not able to conduct non-response bias tests on the data set.

A second type of validation test is to compare the demographic structure of survey respondents to Census data about the County. Due to space limitations, the Pierce County Broadband Survey did not include demographic questions. Thus, it is not possible to compare the demographic profile of respondents to the overall adult population of the County.

In addition to numeric data, respondents provided additional written answers. Appendix A contains the written responses.

Appendix B contains a copy of the survey questionnaire with a complete quantitative summary of responses by question.

Appendix C is a map of Pierce County and the areas served by the local exchange carriers (LEC).
Residential Broadband

The initial nine questions asked respondents about residential broadband/Internet issues. The initial question asked if they have broadband/Internet service at their homes. As shown in Chart 1, three-fourths of respondents said they have a broadband network connection.
Respondents were asked to indicate their current broadband provider from a list of 11 providers. The results are shown in Chart 2 and indicate that AT&T has the most subscribers among survey respondents (19%). Comcast and CenturyLink are tied for second place at 15% each. BEVCOMM and Verizon followed at third and fourth respectively.

Among the “other” responses 3% of respondents entered HughesNet, and 2% use PressEnter. HughesNet and Exede are satellite-based systems, and PressEnter offers DSL service in River Falls, WI.
As shown in Chart 3, 85% of residential respondents with Internet access pay no more than $100 for their service. The large portion of respondents said they pay $51 to $100 (52%) and a third of respondents pay less than $50 monthly.

Chart 3. Monthly Cost

- Under $50: 33%
- $51-100: 52%
- $101-150: 10%
- $151-200: 4%
- $201 and above: 1%
A service agreement is a frequent requirement for Internet service. Chart 4 indicates that over half of respondents said their provider requires a service agreement.
Among respondents whose providers require a service agreement, nine in ten agreements are for no more than two years. The most common period is two years (66%). A one-year agreement is required by 23% of respondents’ providers. (See Chart 5).

**Chart 5. Length of Service Agreement**

- 1 year: 23%
- 2 years: 66%
- 5 years: 4%
- Other: 7%
Respondents were next asked a group of questions about the speed of their Internet connection and data volume limitations.

As shown in Chart 6a, four in ten respondents did not know the upload speed of their Internet connection. Among those who were aware of their connection speed, the largest portion (24%) said their connection is less than one megabit per second (Mbps), and an additional 15% said their upload connection is one to three Mbps. About 22% of respondents reported upload speeds faster than 3 Mbps.
Similarly, four in ten respondents said they are not sure of the download speed of their Internet connection, while 22% said their download speed is less than 1 Mbps. (Chart 6b). Among respondents who reported a speed difference between their upload connection speed and their download connection, far more respondents said their download speed is faster.
As shown in Chart 6c, a quarter of respondents said they are not sure if their Internet connection has a monthly data use limit. Half the respondents said there was no data limit on their Internet connection. Among those with a data limit, allowances most exceeded 2 gigabytes per month.

**Chart 6c. Monthly Data Use Limit**
As shown in Chart 7a, respondents are about equally split with respect to their satisfaction with their current Internet provider. Half of respondents are unsatisfied (27%) or very unsatisfied (23%) and a roughly equal proportion are either satisfied (45%) or very satisfied (6%).
The SRC cross-tabulated the level of satisfaction with respondents’ current Internet providers. There were not enough respondent evaluations of Nelson Telephone, Riverland Communication, and West Wisconsin Telecom to produce reliable results, and they were excluded from the analysis. In addition, the SRC analyzed respondent satisfaction of the hand-entered “other” providers. There were enough observations of Hughes Net to include in the analysis, but the remaining “other” entries were not included due to a low number of observations. The upper bar in Chart 7b shows the combined percentage of satisfied plus very satisfied respondents. The lower bar is the combined percentage of respondents who are dissatisfied plus very dissatisfied. Respondents’ satisfaction ratings were higher for Midcontinent (61%), Comcast (58%), BEVCOMM (57%) and CenturyLink (57%). Results were about equally split for Verizon, Spring Valley Telephone, and AT&T. Respondents were least satisfied with satellite Internet providers Exede and Hughes Net.

Even among the most favorable results for the individual providers, at least four in ten respondents were unsatisfied or very unsatisfied with their service. With this relatively high proportion of respondents saying they are unsatisfied or very unsatisfied, there is substantial room for improvement in the overall satisfaction ratings among all providers.
A cross-tabulation was prepared to compare the levels of satisfaction of respondents from cities and respondents from rural areas of Pierce County. The “city” locations were defined as the incorporated areas of River Falls, Ellsworth, and Prescott. For the purposes of this analysis, Geographic Information Systems (GIS) was used to expand the boundaries of these three municipalities by 15,000 feet beyond the official municipal boundaries. The 15,000 foot extension was chosen because it is the approximate distance that DSL service can be extended beyond the telephone company’s central station into the adjoining unincorporated jurisdictions. All other areas of Pierce County were placed in the “rural” group.

The cross-tabulation indicated that 55% of “city” respondents were satisfied or very satisfied with their current Internet provider compared to 50% of “rural” respondents. However, statistical tests indicated that this difference is not statistically significant. Thus, there is not sufficient evidence to conclude that “city” respondents are more satisfied with their Internet provider than “rural” respondents.
Respondents were asked to indicate who provides their current residential **landline** telephone service. As shown in Chart 8, AT&T is the provider for 36% of respondents. CenturyLink is a distant second with 14%, followed by BEVCOMM with 11%. One in four respondents said they have no landline service, which is roughly consistent with the results of a national survey that found more than one in three households (35.8%) did not have a landline telephone but did have at least one wireless telephone. Thus it is likely that most of the Pierce County households without a landline are using their cell phones for telephone service.

Among the written responses in the “Other” category, Comcast was the most frequent and accounted for half of the “Other” responses.

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**Chart 8. Current Telephone Provider**

- **AT&T**: 36%
- **CenturyLink**: 14%
- **BEVCOMM**: 11%
- **Spring Valley Telephone**: 4%
- **Nelson Telephone**: 1%
- **West Wisconsin Telecom**: 1%
- **None**: 25%
- **Other**: 8%

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2 Centers for Disease Control, National Health Interview Survey, 2012.
http://gigaom2.files.wordpress.com/2012/12/wireless201212.pdf
When asked about the benefits of a fiber optic Internet connection, Chart 9 indicates the most frequent perceived benefit is faster Internet connection speeds (79%). A majority (62%) of respondents also believe that more service reliability is a benefit of fiber optics.

A third of respondents believe that fiber optic connections offer greater security. Relatively few respondents believe there are other benefits to fiber optics.

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faster speeds</td>
<td>79%</td>
</tr>
<tr>
<td>Reliability</td>
<td>62%</td>
</tr>
<tr>
<td>Security</td>
<td>33%</td>
</tr>
<tr>
<td>Future proof</td>
<td>17%</td>
</tr>
<tr>
<td>No benefits</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>11%</td>
</tr>
</tbody>
</table>
Business Broadband

The remaining questions on the survey (Q10 to Q18) were designed for business owners.

Chart 10 shows that among business respondents, nearly all said they own their business facility.
Business owners were asked how many people they employ. As shown in Chart 11, half of the business respondents said they preferred not to answer the question. The largest portion, four in ten, said they employ up to five people.

After deleting the answers of respondents who said they preferred not to answer, the SRC cross-tabulated the questions for businesses by the number of employees. Noteworthy differences based on the number of employees will be identified in the remainder of the report.
Chart 12 indicates that businesses frequently bundle their Internet service with telephone service (68%). However, only 16% also receive television from their Internet provider. Fewer than 10% of business respondents said they have virus protection and data backup/protection from their Internet provider.

A third of business respondents with 10 or more employees said they purchase data backup/protection services compared to less than 10% of business respondents with less than 10 employees.
About six in ten business respondents said their total monthly communication budget (excluding cell phones) is no more than $100 (Chart 13). An additional 25% of business respondents said their telecommunication budget is between $101 and $200. Only 12% of business respondents said they spend over $200 per month on telecommunication services.

Not surprisingly, respondent businesses with 10 or more employees have larger monthly telecommunication budgets. One in four larger employers (10 or more employees) spend more than $400 per month, while about four in ten of those who have fewer than 10 employees spend less than $100 per month on telecommunication services.
Chart 14 shows that a third of business respondents said their current broadband Internet connection is via a fiber optic system. Half of business respondents said no, while 16% are not sure.

Business respondents with 6 to 9 employees were more likely currently to have fiber optic service (28%) compared to businesses with 1 to 5 employees (12%) or businesses with 10 or more employees (14%).
Although a third of business respondents currently use a fiber optic connection, Chart 15 indicates that demand exists among the business community for a fiber optic broadband connection at their places of business. Eight in ten business respondents said they would be interested in receiving their Internet access via fiber optics.

![Chart 15. Interested in Fiber Optic Network](chart.png)
As shown in Chart 16, price is a substantial concern among business owners interested in a fiber optic connection. Eight in ten business respondents said they would be interested in a fiber optic connection if the price were better. Connection speed was a much smaller issue, with four in ten business respondents saying they would be interested in a fiber optic connection if speed was better. Only 23% said they would be interested if more services were offered. And just 6% of business respondents said they would not be interested at all in a fiber optic connection. One in ten were not sure.

**Chart 16. Interested in a Fiber Optic Connection?**
*Total exceeds 100% - Multiple Answers Permitted*

- Yes, if the price was better: 81%
- Yes, if the speed was better: 41%
- Yes, if more services were offered: 23%
- No: 6%
- I don’t know: 10%
About half of the business respondents indicated that they did not have broadband service. These business respondents were asked their reasons for not having a broadband Internet connection.

As shown in Chart 17, the primary reason is that the owner does not see any use for broadband Internet (64%). However, a substantial minority (27%) of businesses without a broadband connection said they do not have broadband because it is not available.

Only 10 percent said it is too expensive, while 4% said they do not have a computer.
Conclusions

Key findings of this survey include the following:

• Half of residential respondents are unsatisfied or very unsatisfied with their current Internet provider.

• Residential respondents believe faster speeds and greater reliability to be the top two benefits of a fiber optic broadband connection.

• A third of business respondents said their Internet connection is via fiber optics.

• Four in five business respondents are interested in a broadband Internet connection via fiber optics, but they have concerns about the price of a fiber optic connection.
Appendix A – “Other” Written Responses

Q2 Other: Who is your current provider? (195 Responses)
- Hughes Net (45X)
- Press Enter (34X)
- Baldwin Telecom (18X)
- Wild Blue (18X)
- Sprint (14X)
- T-Mobile (12X)
- Nextera Communication (10X)
- St Croix Electric (8X)
- Dish (7X)
- Satellite (5X)
- Celect Communications (3X)
- Verizon (2X)
- AT&T Wireless Broadband
- Broadband Blue
- Broadband to go
- Earthlink
- Exede
- Hammond
- LocalNet
- Locked out to other providers.
- LTE Mobile Hotspot
- Mi-Fi Liberate
- Mobile Personal Hotspot
- Net Zero
- Prepaid
- Sky Blue
- Sprint Hotspot
- T-Mobile Hotspot
- Virgin Mobile
- We have only 2 choice and I have had problem with both Comcast or Century Link
- Wi-Fi

Q5 Other: How many years were required? (48 Responses)
- Don’t know (14X)
- 3 years (11X)
- 0 years (10X)
- 6 months (4X)
- 3 months
- 6 months then $ increases
- 10 years
- 12 years
- Monthly
- Never change price
- No choice!
• Ongoing
• Required Landline

**Q8 Other: Who is your current phone service provider (land line)? (192 Responses)**

- Comcast (69X)
- Verizon Wireless (29X)
- Baldwin Telecom (18X)
- Sage Telecom (14X)
- T-Mobile (9X)
- We only use cell phones (8X)
- Vonage (5X)
- Magic Jack (4X)
- Straight Talk (4X)
- MCI (3X)
- Verizon, technically it’s a cell phone (3X)
- We do not have a landline (3X)
- Consumer Cellular (2X)
- Ooma (2X)
- Sprint (2X)
- Vonage (IPO) (2X)
- Basic Talk
- Binch Communications
- Comcast (bundle)
- Comcast (only one) here when we moved here.
- Comcast via modern
- Just switched to Verizon for other line. AT&T was only increasing rates
- Locked out to other providers
- Matrix
- MBL
- Safe Link
- Sprint for computer
- Sprint- no land line
- T-Mobile-through internet
- TracFone
- Wild Blue-satellite dish

**Q9 Other: What do you believe the benefits of a fiber broadband network would be? (301 Responses)**

- Reduced Price (91X)
- Not sure (38X)
- Not sure what Fiber Broadband is (25X)
- Unlimited Data (21x)
- More competitive pricing (12X)
- Unsure (8x)
- I am employed from home and need internet access (5X)
- Streaming capability (5X)
- Consumer choice (4X)
- I wouldn't have to deal with AT&T (4X)
- Internet access-none available (4X)
- More data time for less money! (4X)
• Reception (3X)
• Reliability, speed, reliability, speed! (3X)
• Weather Proof (3X)
• Better band width during Packer hours (2X)
• Faster (2X)
• No/far less latency then satellite (2X)
• Some kind of internet source! (2X)
• WI TV Stations (2X)
• All what available
• Another option, Verizon is our only option
• Another Option
• AT&T says DSL not available
• Available to everyone
• Avoid internet other than on phone
• Banow 10th for 4K broadcast resources
• Being current with technology
• Better quality
• Better TV options
• Brand name and past performance
• Broader across to all the various web servers
• Cable TV
• Clearer phone service
• Complete honesty in contract
• Current speed is 56KB-need more speed
• Depends if taxes go up
• Do not plan on getting any
• Don't believe security is really possible anymore
• Don't have a computer. No cable.
• Our only current option is satellite not offered thru phone company
• Economic development
• Fewer interruptions to service
• Fiber broadband is the best option for real service (no satellite, wireless, etc.)
• Financial
• For those without current access
• Freedom from Comcast monopoly
• Fundamental Usage
• Get me in the rest of the world
• Have no service currently so don't know
• High grade servers for security.
• Higher data. We are limited to 12GB from our satellite and 8GB from our cell service.
• I might get a computer
• I think it would be obsolete soon after being installed
• Increased productivity/$$$
• Individual not business
• ISP Competition to expand network
• Keeping up with the technology paradigm
• Local firm
• Lost and no monopolies
• More bandwidth to reduce lag
• More capacity
- More content options bring up to today
- More gigabytes
- No business
- No Dish on our house
- No far, fair act policy per day
- None is available but this would be cheaper
- Not able to select options
- Not sharing bandwidth with neighbors!
- Package Pricing Discount
- Phone company benefits from more money.
- Plan to move to country, County Rd E. I need internet for telecommuting job.
- Possibly cost if included in taxes
- Potential for new service
- Prefer fiber optic solution
- Right now I can't get internet with the Spring Valley phone company without phone service
- Rural Service
- Satellite is very expensive
- School needs - currently online too slow for need (U of M) need for local school also
- Home office support.
- TiVo
- Available forms hopefully
- Too costly
- Value
- We had no choice with our carrier. No other company services in our area.
- Wisconsin TV

Q17 Other: If you do not use internet with a broadband connection in your operation, why not? (29 Responses)
- No business-residential only (5X)
- Do use it (2X)
- Just moved here no good solution (2X)
- No need (2X)
- Unsure (2X)
- Cable
- Don't need it-don't like it.
- Don't use separate internet
- DSL would be desirable but it's not available. AT&T is our phone provider. They are too cheap to provide broadband.
- I use satellite now - would love to change to fiber
- Internet works-don’t know how it does
- Lack of reliability
- Not an option
- Not positive if available
- Not ready/big enough for link
- Rather read and play instrument
- Retired
- Total system upgrade required before investment $
- Used with home/residential
- Verizon is the only service that works here
- Work from home
Appendix B – Quantitative Summary of Responses by Question

Broadband Survey of Pierce County

Purpose:
To learn the current extent of broadband service in Pierce County and determine the missed opportunities for the people of Pierce County, both residential and commercial.

Broadband definition:
The term broadband refers to any type of transmission technique that carries several data channels over a common wire. In home networking, broadband constitutes any form of high-speed Internet access using this transmission technique. Both DSL and cable modem are common broadband Internet technologies. Other forms of home broadband include fiber (FTTH) and fixed wireless.

Questions: Using blue or black ink, please fill the circle that most closely matches your response.
  Fill in the circle – Like this: ●  Not like this: ☒  ☑  ☐

What is your current address? (This information will help us work with a vendor to potentially provide a high speed broadband solution in your area; it will not be used for any other purpose or solicitation.)

<table>
<thead>
<tr>
<th>1. Do you have Broadband/Internet service at your home?</th>
<th>6. What is the advertised speed of your Broadband/Internet connection? Mbps (megabits per second)</th>
</tr>
</thead>
<tbody>
<tr>
<td>74% Yes</td>
<td>6a. Upload speeds?</td>
</tr>
<tr>
<td>26% No (if you answered ‘No’, please go to #8)</td>
<td>24% Less than 1 Mbps</td>
</tr>
<tr>
<td></td>
<td>15% 1-3 Mbps</td>
</tr>
<tr>
<td></td>
<td>10% 4-6 Mbps</td>
</tr>
<tr>
<td></td>
<td>3% 7-9 Mbps</td>
</tr>
<tr>
<td></td>
<td>9% 10 Mbps or more</td>
</tr>
<tr>
<td></td>
<td>40% I am not sure</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. If yes, who is your current provider?</th>
<th>6b. Download speeds?</th>
</tr>
</thead>
<tbody>
<tr>
<td>19% AT&amp;T</td>
<td>22% Less than 1 Mbps</td>
</tr>
<tr>
<td>12% Bevcomm</td>
<td>9% 1-3 Mbps</td>
</tr>
<tr>
<td>15% CenturyLink (formerly CenturyTel)</td>
<td>8% 4-6 Mbps</td>
</tr>
<tr>
<td>15% Comcast</td>
<td>4% 7-9 Mbps</td>
</tr>
<tr>
<td>7% Exede</td>
<td>15% 10 Mbps or more</td>
</tr>
<tr>
<td>3% Midcontinent</td>
<td>42% I am not sure</td>
</tr>
<tr>
<td>0% Nelson Telephone</td>
<td>6c. Do you have monthly data limits? (i.e. 4GB)</td>
</tr>
<tr>
<td>1% Riverland Communications LLC</td>
<td>1% 500MB or less</td>
</tr>
<tr>
<td>4% Spring Valley Telephone</td>
<td>14% 5.0 GB to 10.0 GB</td>
</tr>
<tr>
<td>11% Verizon</td>
<td>1% 500MB to 1.0 GB</td>
</tr>
<tr>
<td>3% West Wisconsin Telcom</td>
<td>50% No data limit</td>
</tr>
<tr>
<td>10% Other? See Appendix A</td>
<td>2% 1.0 GB to 2.0 GB</td>
</tr>
<tr>
<td></td>
<td>8% 2.0 GB to 5.0 GB</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. What is your monthly cost for Broadband/Internet service?</th>
<th>7. How satisfied are you with your current Broadband/Internet provider? (choose one response)</th>
</tr>
</thead>
<tbody>
<tr>
<td>33% Under $50.00</td>
<td>23% Very unsatisfied</td>
</tr>
<tr>
<td>52% $51-100</td>
<td>27% Unsatisfied</td>
</tr>
<tr>
<td>10% $101-150</td>
<td>45% Satisfied</td>
</tr>
<tr>
<td>4% $151-200</td>
<td>6% Very satisfied</td>
</tr>
<tr>
<td>1% $201 and above</td>
<td>8. Who is your current phone service provider (land line)?</td>
</tr>
<tr>
<td></td>
<td>25% None</td>
</tr>
<tr>
<td></td>
<td>36% AT&amp;T</td>
</tr>
<tr>
<td></td>
<td>11% Bevcomm (Hager Telecom Inc.)</td>
</tr>
<tr>
<td></td>
<td>14% CenturyLink (formerly CenturyTel)</td>
</tr>
<tr>
<td></td>
<td>1% Nelson Telephone</td>
</tr>
<tr>
<td></td>
<td>4% Spring Valley Telephone</td>
</tr>
<tr>
<td></td>
<td>1% West Wisconsin Telcom</td>
</tr>
<tr>
<td></td>
<td>8% Other? See Appendix A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4. Was there an agreement required?</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>56% Yes</td>
<td>23% Very unsatisfied</td>
</tr>
<tr>
<td>44% No</td>
<td>27% Unsatisfied</td>
</tr>
<tr>
<td></td>
<td>45% Satisfied</td>
</tr>
<tr>
<td></td>
<td>6% Very satisfied</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5. If yes, how many years were required?</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>23% 1 year</td>
<td>25% None</td>
</tr>
<tr>
<td>4% 5 years</td>
<td>36% AT&amp;T</td>
</tr>
<tr>
<td>66% 2 years</td>
<td>11% Bevcomm (Hager Telecom Inc.)</td>
</tr>
<tr>
<td>7% Other? See Appendix A</td>
<td>14% CenturyLink (formerly CenturyTel)</td>
</tr>
<tr>
<td></td>
<td>1% Nelson Telephone</td>
</tr>
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<td>1% West Wisconsin Telcom</td>
</tr>
<tr>
<td></td>
<td>8% Other? See Appendix A</td>
</tr>
</tbody>
</table>
9. What do you believe the benefits of a fiber broadband network would be? (choose all that you believe)
   - 79% Faster speeds
   - 62% Reliability
   - 33% Security
   - 17% Future proof
   - 7% No benefits
   - 11% Other (please specify)

10. Do you own or rent your home/building?
    - 95% Own
    - 5% Rent

11. How many employees do you have?
    - 50% Prefer not to answer
    - 42% 1-5
    - 4% 6-10
    - 3% 10 or more

12. Which other services do you purchase from your Broadband/Internet provider? (choose all that apply)
    - 68% Telephone
    - 16% Television
    - 7% Data backup/protection
    - 8% Virus protection
    - 25% None

13. What is your total monthly telecommunications budget? (do not include cell phone service)
    - 62% $1-100
    - 26% $101-200
    - 8% $201-300
    - 2% $301-400
    - 1% $401-500
    - 1% $500 and above

14. Is your Broadband/Internet service delivered over a fiber optic network directly to your business?
    - 34% Yes
    - 50% No
    - 16% I don’t know

15. Would you be interested in receiving your Telecommunications (including Broadband/Internet) over a fiber optic network if available?
    - 80% Yes
    - 6% No
    - 14% I don’t know

16. Would you switch to a direct fiber connection for your business? (choose all that apply)
    - 81% Yes, if the price was better
    - 41% Yes, if the speed was better
    - 23% Yes, if more services were offered
    - 6% No
    - 10% I don’t know

17. If you do not use Internet with a broadband connection in your business operation, why not? (mark all that apply)
    - 64% Don’t see any use
    - 4% No computer
    - 10% Too expensive
    - 27% Not available
    - 1% Other (please specify)

18. If yes, please share with us your business website and/or your business email address.
    (Note: this information will only be used for this survey)
    (Please leave blank if you don’t have one)
    Business URL: 
    Business email address: 

This survey will be used to assist Pierce County in working with vendors to provide reliable High Speed Broadband Internet service to all of Pierce County at a reasonable rate.

Please return by folding the survey per the instructions on the back and put it in the mail or by dropping off at one of the following locations:
1. Ellsworth Creamery
2. Participating Local Financial Institutions
3. Ellsworth Village Hall
4. Pierce Pepin Cooperative Services

Thank you for your time and have a great day.
If you have any questions please call
Jeff Olson at 715/273-2408

Please complete and return by March 31, 2014
Appendix C – Map of Pierce County Local Exchange Carriers (LEC)