



# Broadband Business Survey

## Tampa Bay Regional Planning Council



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# Introduction

## Purpose

- Since broadband is the indispensable infrastructure of the 21st century economy, the purpose of this survey is to gain an accurate idea of current and future broadband (high speed internet) needs in order to plan for future broadband improvements.

## Methodology

- Population definition
  - All businesses in Polk, Charlotte, Lee, Collier, DeSoto, Glades, Hardee, Highlands, and Okeechobee counties
  - Person most knowledgeable about business internet use
- Sampling frame
  - All working business telephone numbers
- Sample size
  - 750 in total study
  - 250 in Polk County
  - 250 in Charlotte, Lee, Collier counties
  - 250 in DeSoto, Glades, Hardee, Highlands, and Okeechobee counties
- Sampling error (given a 95% confidence interval)
  - 3.6% points in total study
  - 6.2% points in Polk County
  - 6.2% points in Charlotte, Lee, Collier counties
  - 6.2% points in DeSoto, Glades, Hardee, Highlands, and Okeechobee counties
- Data collection
  - Telephone interviews conducted from Kerr & Downs Research's office using CATI system
  - Conducted in May 2012

# Executive Summary

Over 9 out of 10 businesses (92%) have internet service

- Among businesses with internet service
  - Typical business has 4 employees using the internet
- \$ 85/month – typical internet connection cost
- 40% of businesses have internet connection bundled with other services
- \$74/month – typical cost for unbundled internet connection
- 61% of businesses rate their internet service as an “excellent” or “good” value

# Executive Summary

Over 9 out of 10 businesses (92%) have internet service

- Businesses with internet service use it for:
  - 78% - communication
  - 77% - research
  - 53% - finance/banking
  - 50% - data management
  - 49% - geographic information
  - 44% - marketing
  - 43% - continuing education
  - 39% - social media
  - 33% - selling products or services
  - 30% - teleconferencing

# Executive Summary

Over 9 out of 10 businesses (92%) have internet service

- Among businesses with internet service
- 37% rate their internet speed very highly; 24% rate it low
- 24% say there is a very high need for a faster connection next year; 37% in the next 3 years
- What businesses could do with faster connections:
  - 16% - increase efficiency
  - 2% - try new services
  - 2% - download or stream services
- Obstacles to getting faster connections:
  - 48% - don't really need it
  - 31% - have fastest connection possible
  - 9% - too expensive
  - 8% - not in the budget
  - 7% - boss/company does not value faster connection

# Executive Summary

- Why high speed internet is important to your company:
  - 71% - getting to websites
  - 55% - computer system
  - 50% - access to data sources
  - 45% - networking
  - 43% - banking
  - 40% - marketing
  - 37% - government forms and regulations
- 66% agree a fast internet connection is critical for maintaining competitiveness
- 63% agree that a fast internet connection is critical for being able to produce and deliver goods and services
- 54% agree that a fast internet connection is critical for survival

# Executive Summary

- 69% have Wi-Fi connections
- Typical business has 5 devices connected to the internet
- 33% of business plan to buy another device that connects to the internet in the next year
- 13% claim to know their upload and download speeds; only 6% were willing to check their speeds
- Media upload and download speeds were 7 Mbps and 10 Mbps, respectively



# Executive Summary

8% of businesses do not have internet service

- Among businesses without internet service:
  - 53% have computers
  - Reasons for not having internet services are:
    - 61% - company does not need computers to survive
    - 10% - want employees to not use the internet
    - 8% - not available in our area
    - 7% - Cost too much

# Executive Summary

## Profile of typical business

- 6 employees
- Type of business
  - 21% - Office/professional
  - 17% - retail
  - 8% - healthcare
  - 7% - restaurant
  - 7% - service industry
- 55% - female

# Research Findings

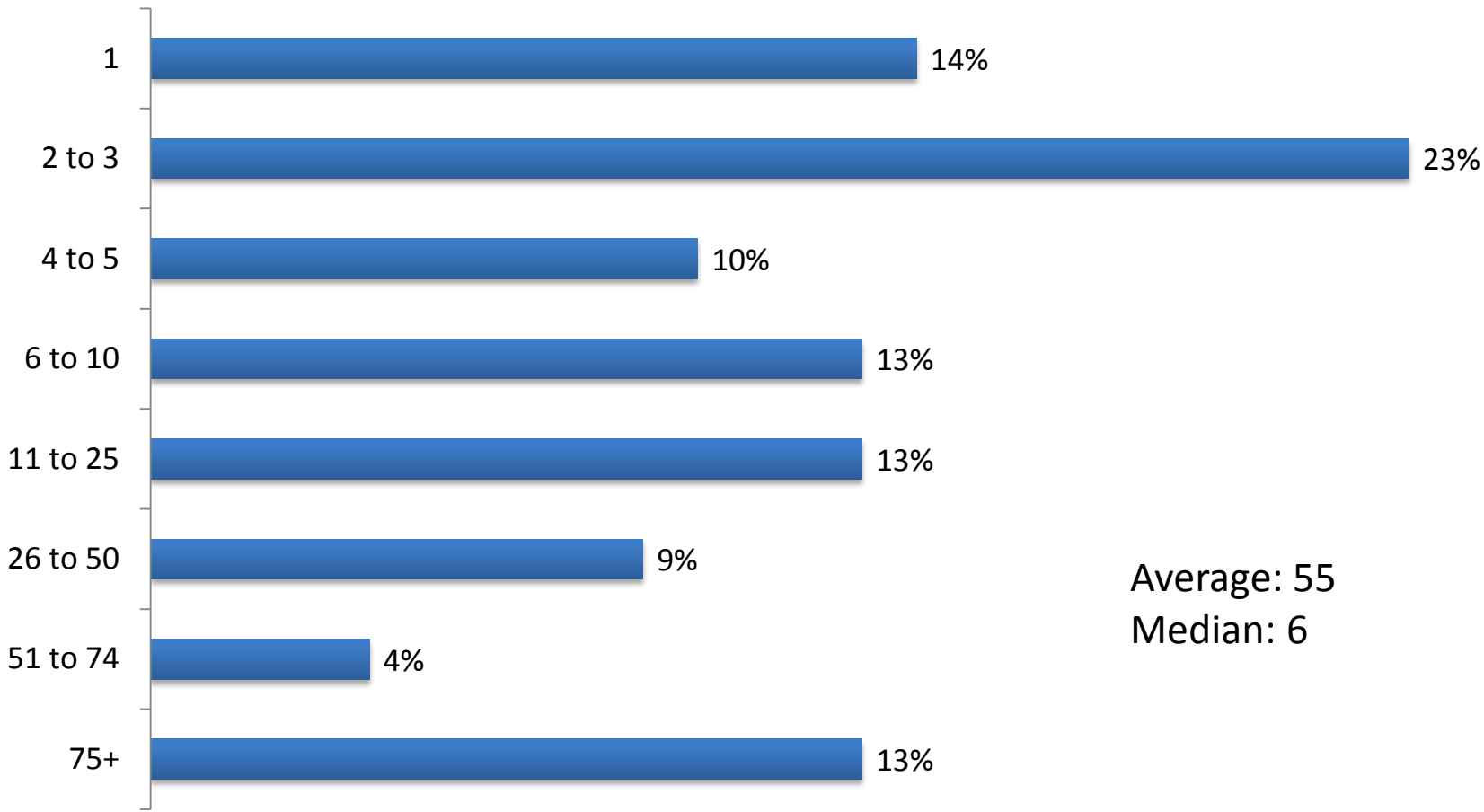
# Does your organization have internet service?



# Does your organization have internet service?

	Yes	No	Not sure
Total	92%	8%	0%
SW Florida	91%	9%	0%
Polk County	92%	8%	0%
RACEC	93%	6%	0%

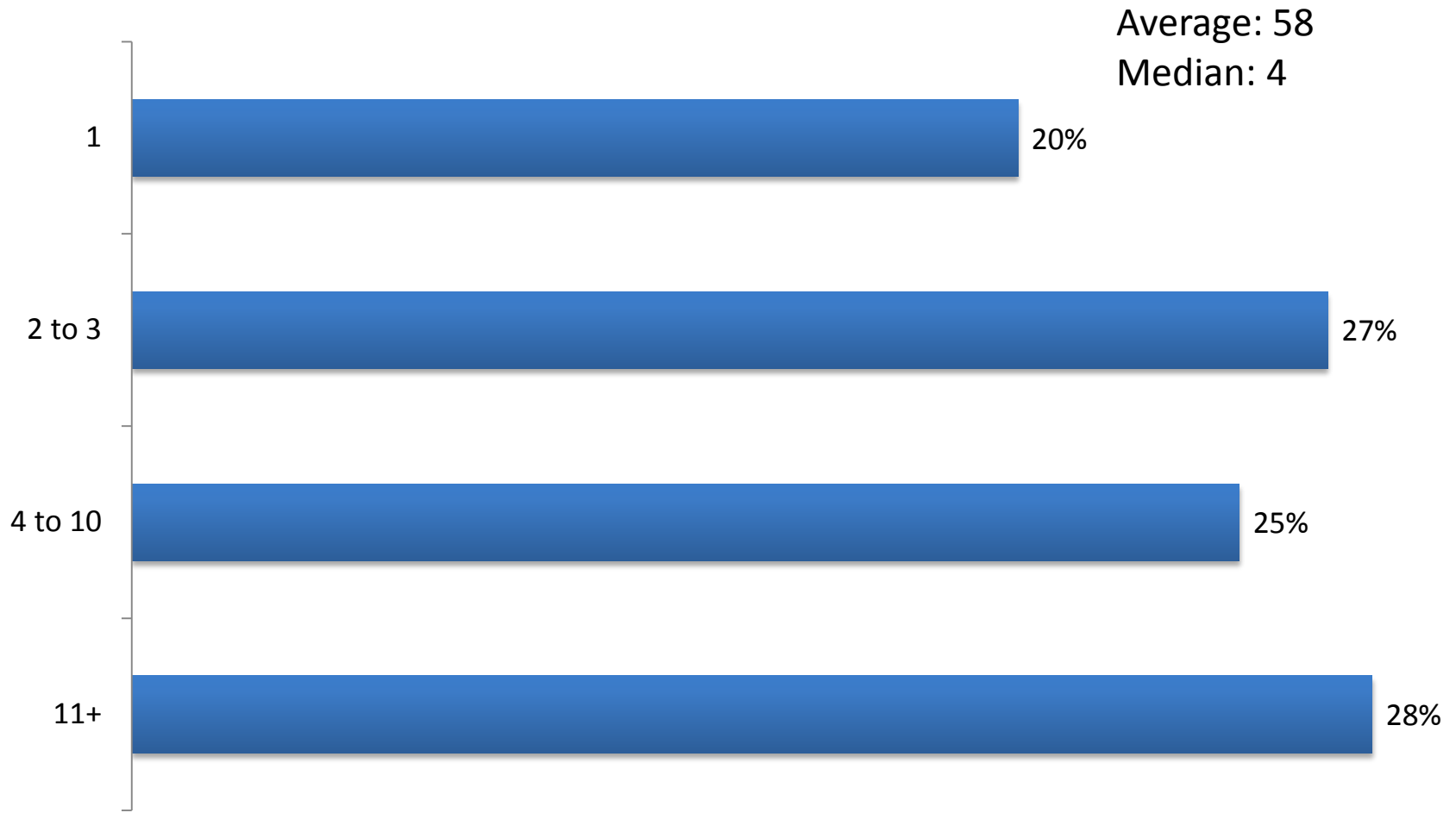
# Number of employees at current location



# Number of employees at current location

	1	2 to 3	4 to 5	6 to 10	11 to 25	26 to 50	51 to 74	75+
Total	14%	23%	10%	13%	13%	9%	4%	13%
SW Florida	15%	20%	10%	13%	7%	10%	6%	20%
Polk County	14%	26%	9%	11%	11%	12%	4%	13%
RACEC	14%	22%	11%	15%	20%	7%	2%	9%

# Number of employees that use the internet at current location

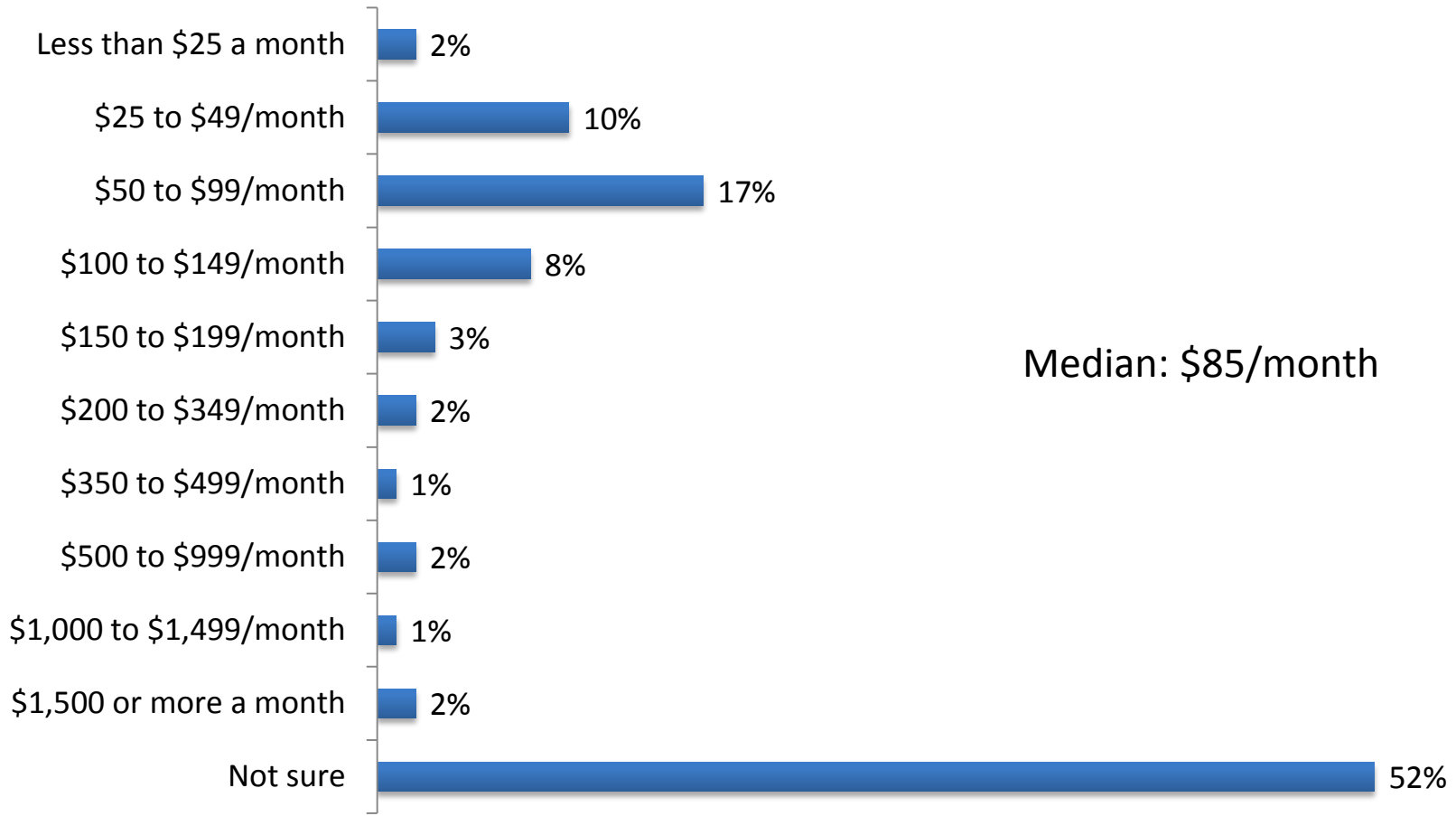




# Number of employees that use the internet at current location

	1	2 to 3	4 to 10	11+
Total	20%	27%	25%	28%
SW Florida	18%	22%	28%	32%
Polk County	18%	29%	25%	28%
RACEC	24%	30%	24%	22%

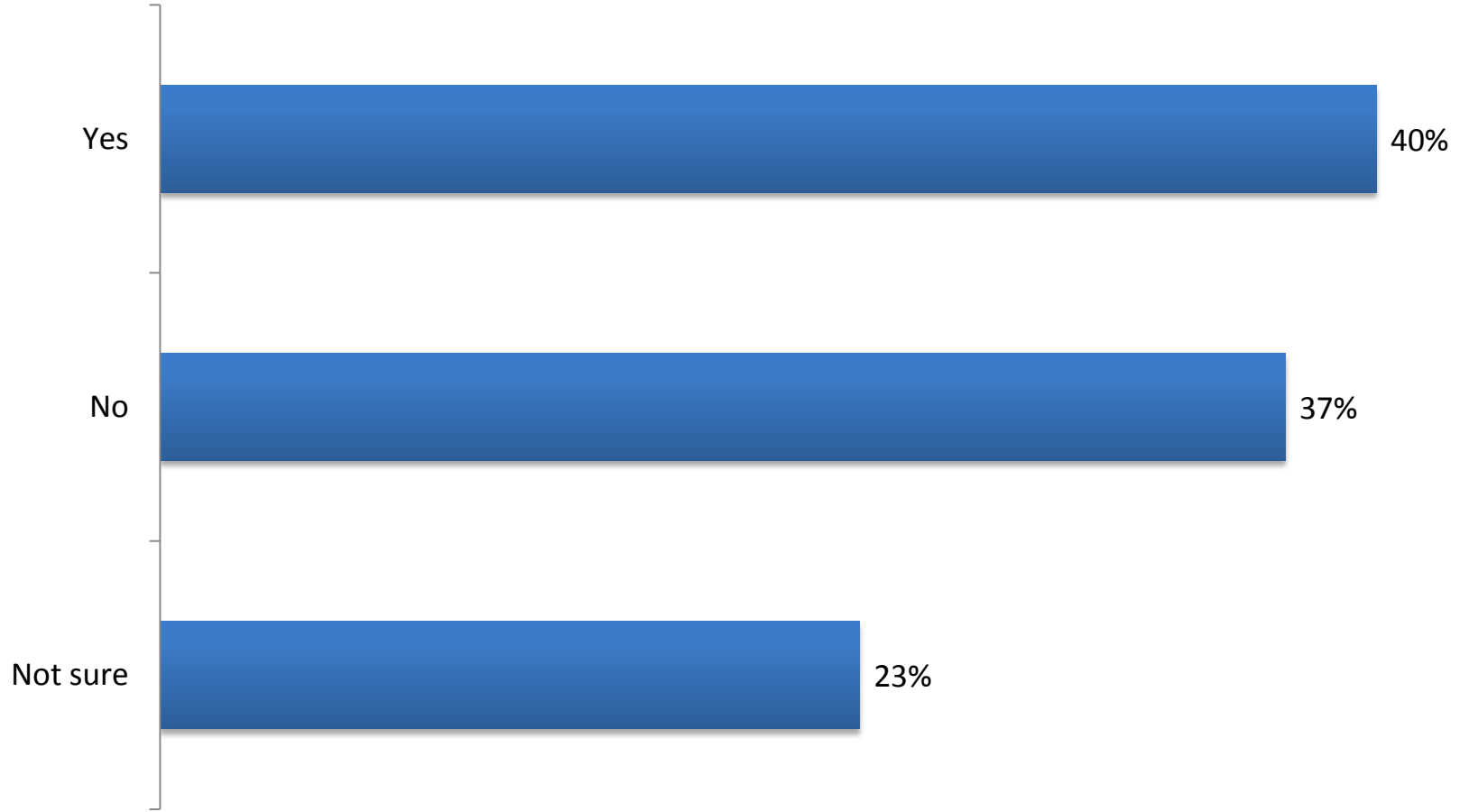
# What is your best estimate of what your company's internet costs each month?



# What is your best estimate of what your company's internet costs each month?

	Less than \$25 a month	\$25 to \$49/ month	\$50 to \$99/ month	\$100 to \$149/ month	\$150 to \$199/ month	\$200 to \$349/ month	\$350 to \$499/ month	\$500 to \$999/ month	\$1,000 to \$1,499/ month	\$1,500 or more a month	Not sure
Total	2%	10%	17%	8%	3%	2%	1%	2%	1%	2%	52%
SW Florida	1%	10%	12%	7%	4%	2%	1%	3%	0%	2%	57%
Polk County	2%	9%	17%	10%	2%	1%	2%	4%	1%	3%	50%
RACEC	3%	11%	21%	8%	3%	3%	1%	1%	1%	1%	48%

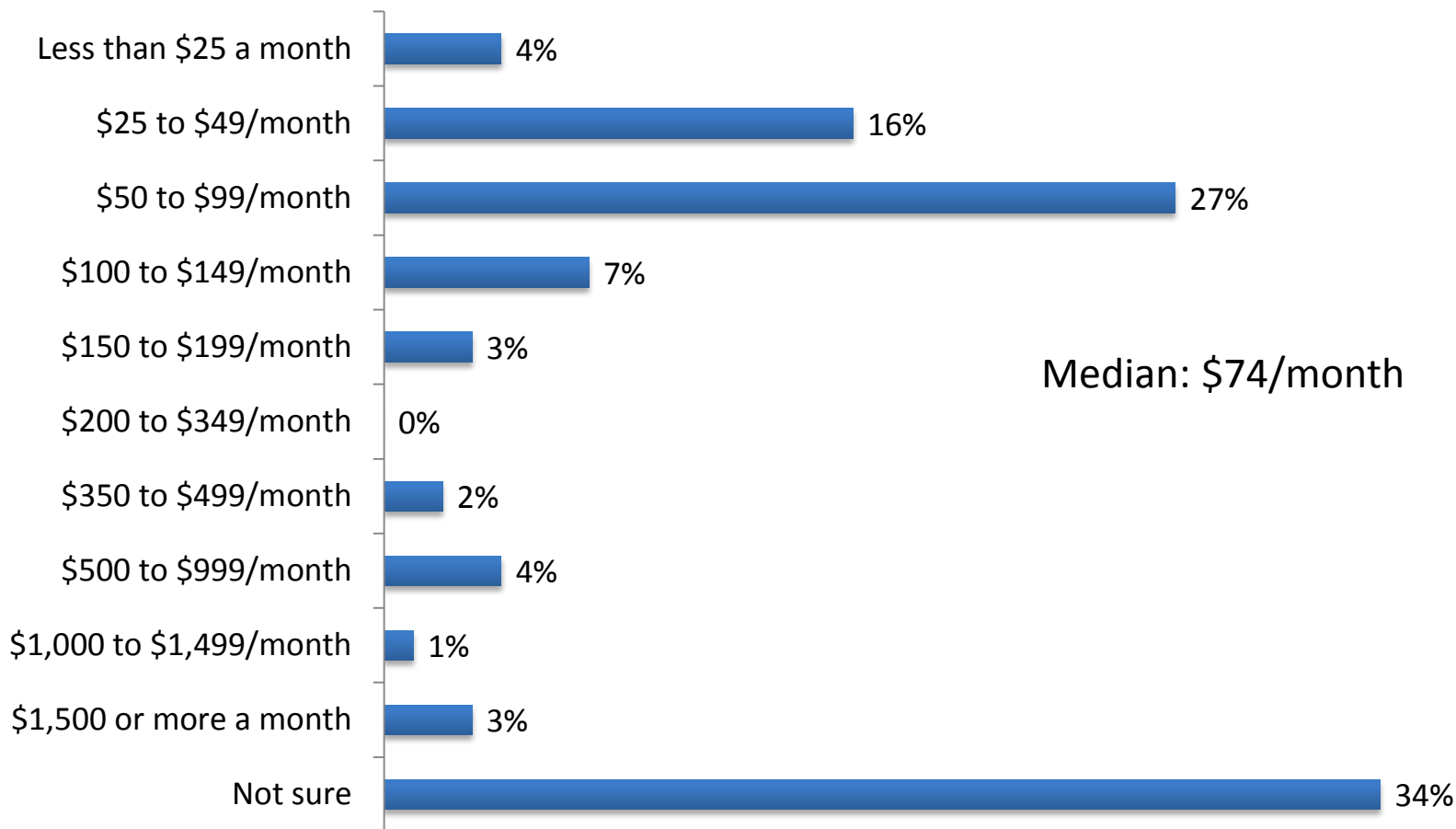
# Does that cost include something else besides internet connection?



# Does that cost include something else besides internet connection?

	Yes	No	Not sure
Total	40%	37%	23%
SW Florida	35%	40%	24%
Polk County	43%	33%	24%
RACEC	42%	39%	20%

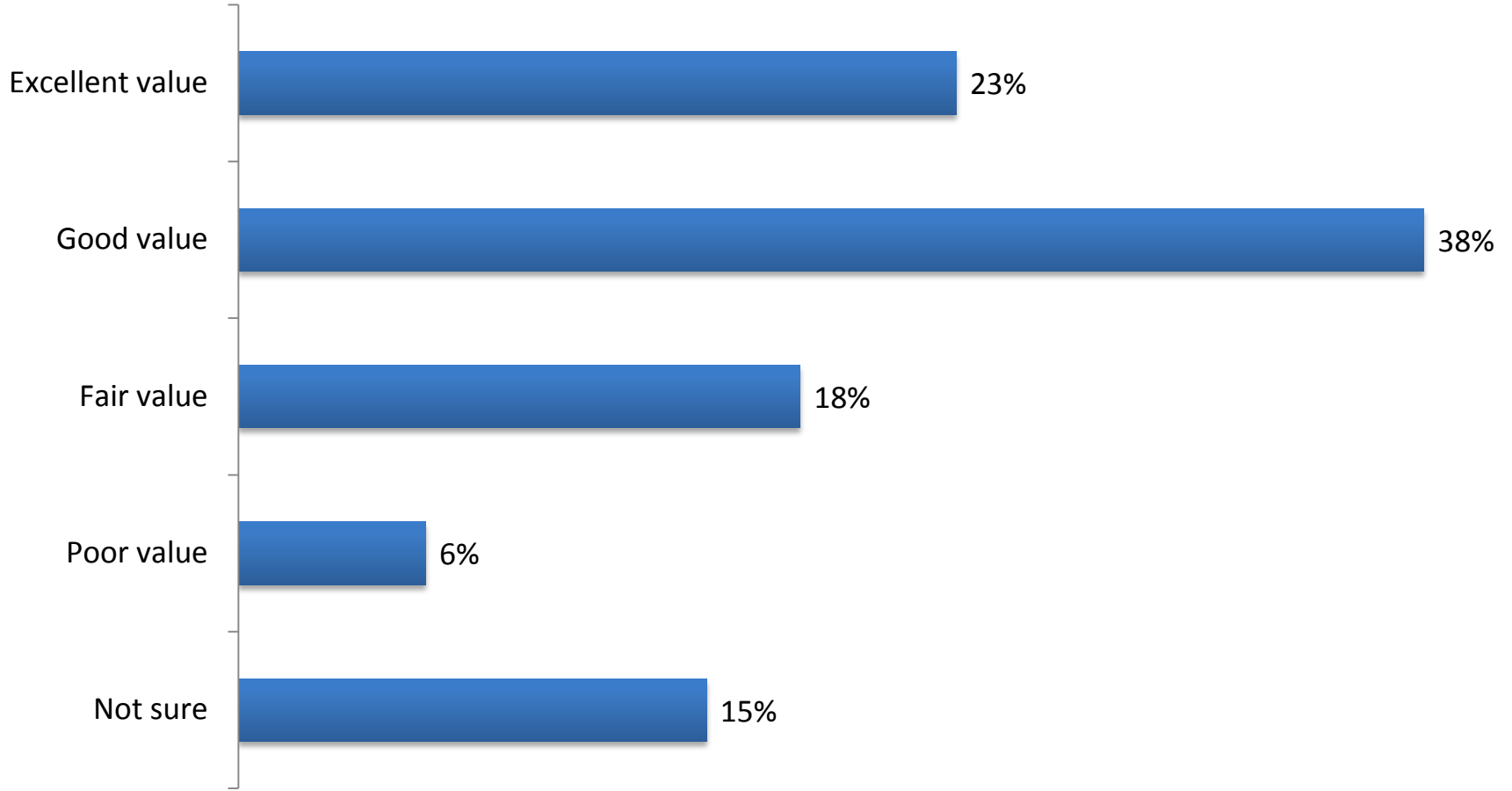
# Best estimate for cost for internet connection only



# Best estimate for cost for internet connection only

	Less than \$25 a month	\$25 to \$49/ month	\$50 to \$99/ month	\$100 to \$149/ month	\$150 to \$199/ month	\$200 to \$349/ month	\$350 to \$499/ month	\$500 to \$999/ month	\$1,000 to \$1,499/ month	\$1,500 or more a month	Not sure
Total	4%	16%	27%	7%	3%	0%	2%	4%	1%	3%	34%
SW Florida	3%	19%	19%	7%	5%	0%	2%	5%	0%	3%	36%
Polk County	5%	16%	28%	8%	1%	0%	1%	5%	3%	5%	27%
RACEC	3%	13%	34%	5%	1%	1%	1%	2%	0%	2%	37%

# Value of internet service

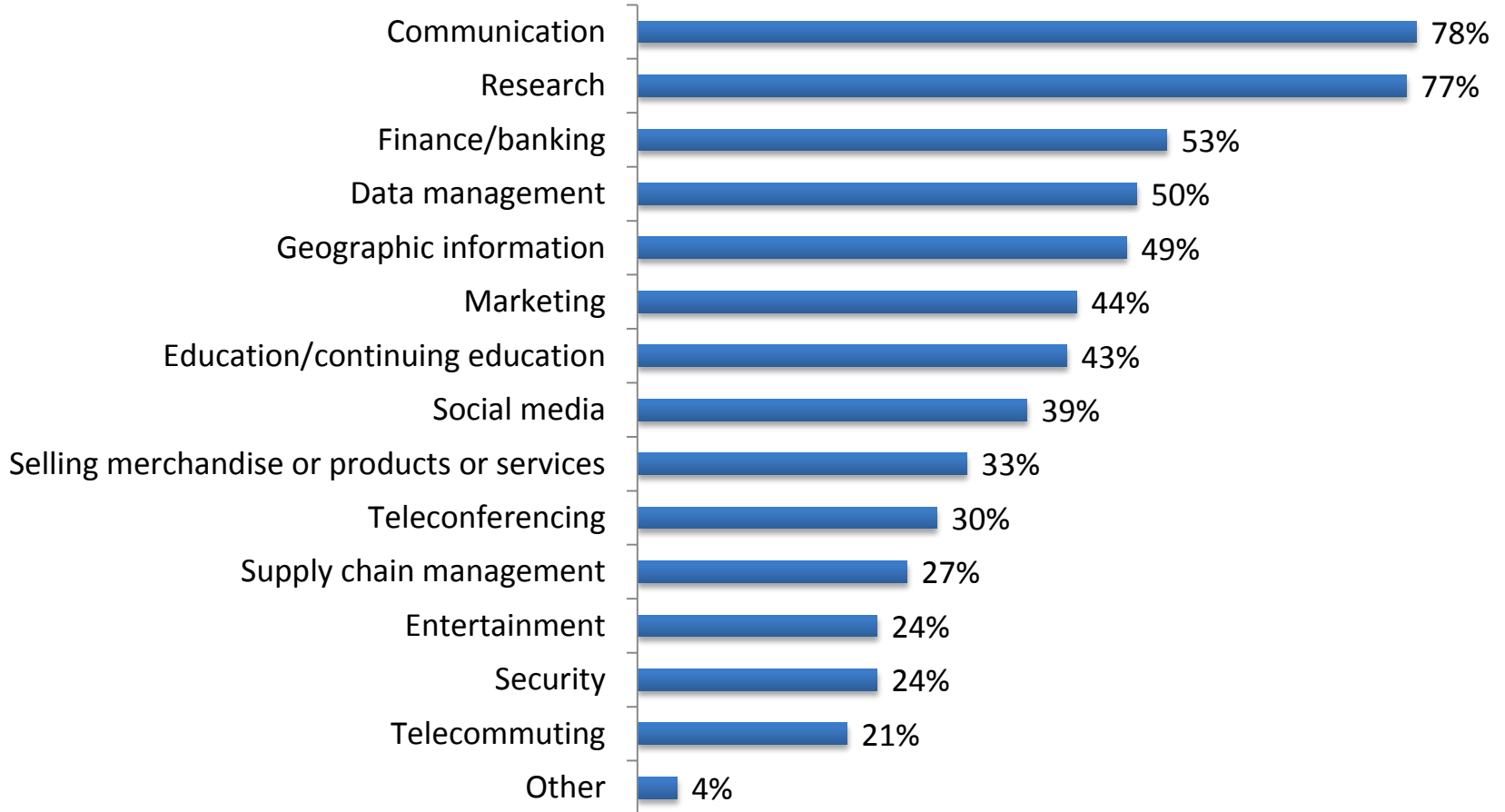




# Value of internet service

	Excellent value	Good value	Fair value	Poor value	Not sure
Total	23%	38%	18%	6%	15%
SW Florida	27%	36%	19%	7%	12%
Polk County	22%	41%	15%	4%	18%
RACEC	21%	36%	21%	7%	15%

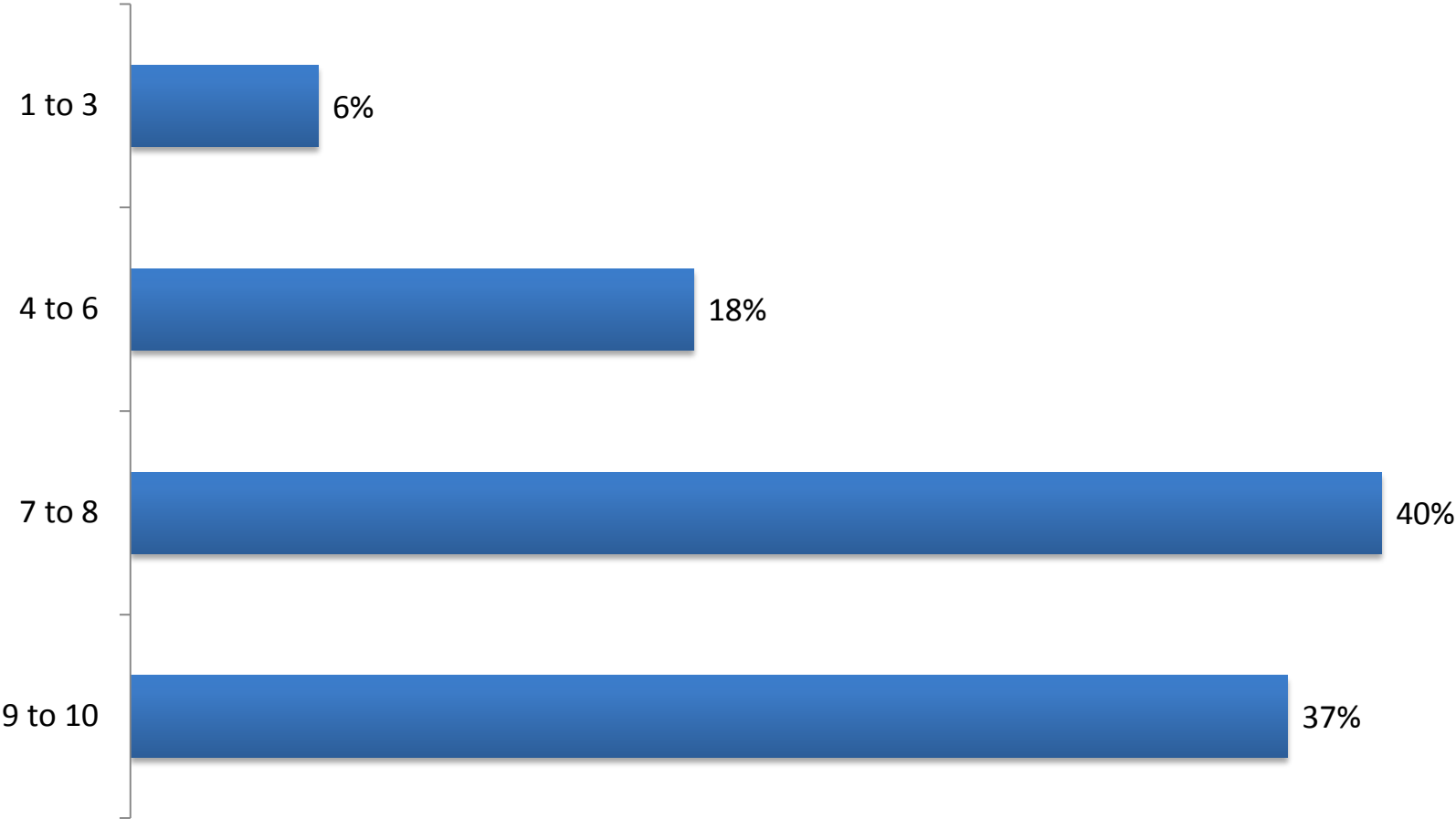
# Internet utilization



# Internet utilization

	Total	SW Florida	Polk County	RACEC
Communication	78%	79%	82%	74%
Research	77%	82%	79%	71%
Finance/banking	53%	60%	46%	53%
Data management	50%	55%	45%	50%
Geographic information	49%	50%	49%	48%
Marketing	44%	56%	42%	35%
Education/continuing education	43%	43%	42%	45%
Social media	39%	42%	40%	35%
Selling merchandise or products or services	33%	36%	32%	32%
Teleconferencing	30%	36%	29%	26%
Supply chain management	27%	24%	27%	29%
Entertainment	24%	28%	24%	21%
Security	24%	25%	22%	24%
Telecommuting	21%	24%	21%	18%
Other	4%	4%	4%	3%

# Rating for internet speed\*



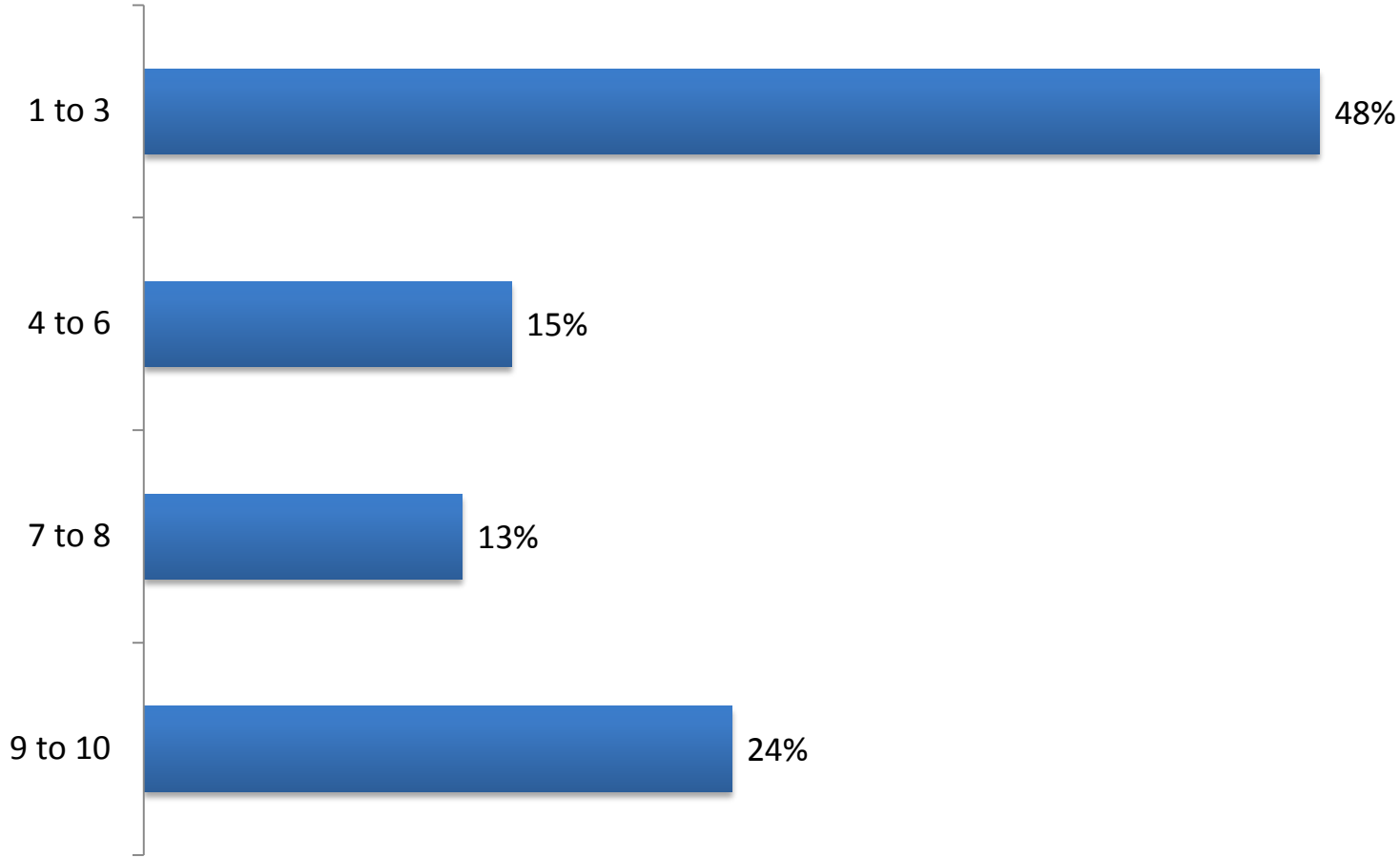
\* 10 means your internet speed serves all of your organization's needs exceptionally well and 1 means your internet speed is severely limiting what your company can do

# Rating for internet speed\*

	1 to 3	4 to 6	7 to 8	9 to 10
Total	6%	18%	40%	37%
SW Florida	5%	17%	39%	39%
Polk County	2%	17%	43%	38%
RACEC	7%	18%	38%	34%

\* 10 means your internet speed serves all of your organization's needs exceptionally well and 1 means your internet speed is severely limiting what your company can do

# Likelihood of needing a faster internet connection in the next year



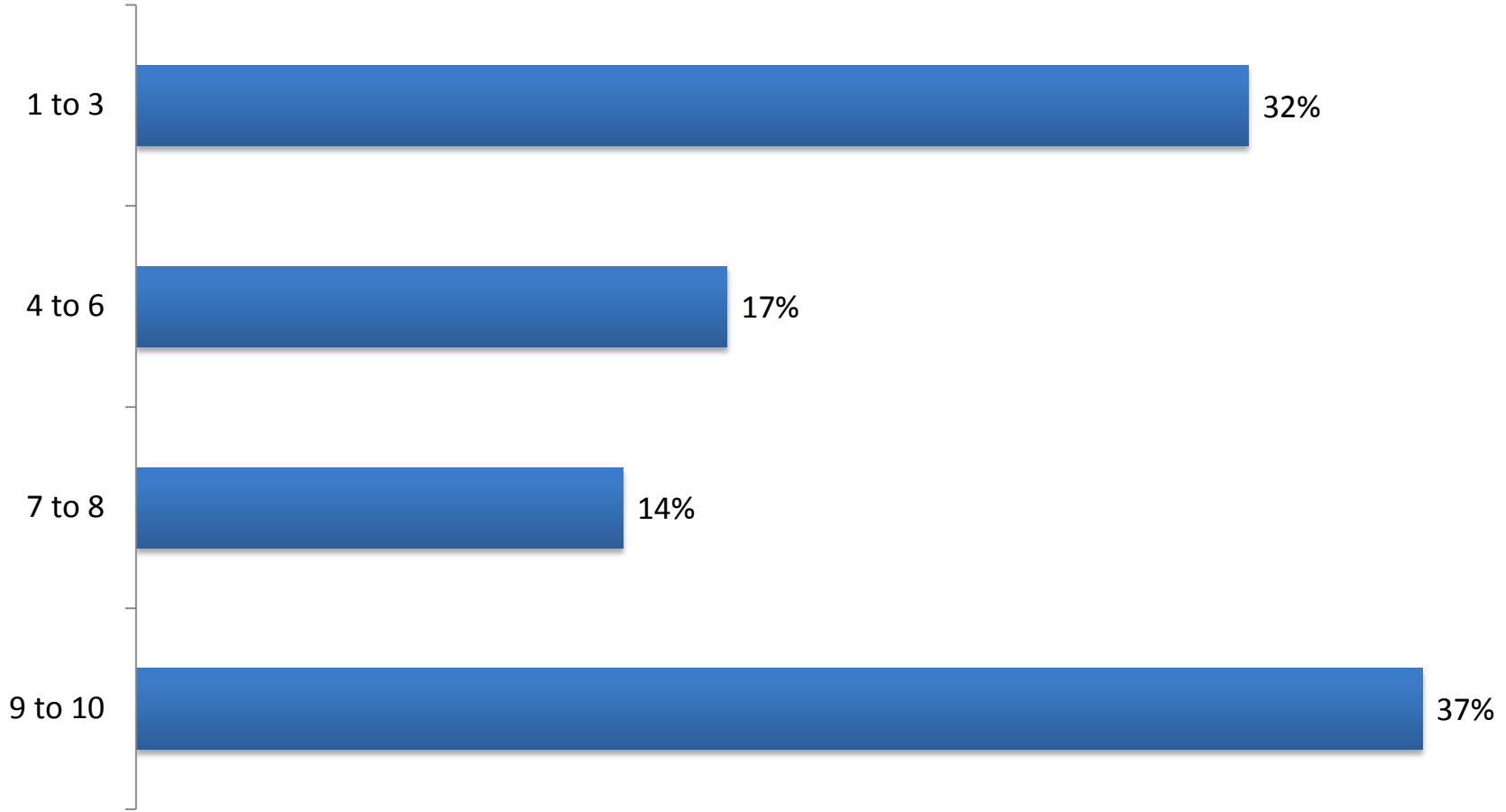
\* 10 means definitely and 1 is definitely not

# Likelihood of needing a faster internet connection in the next year\*

	1 to 3	4 to 6	7 to 8	9 to 10
Total	48%	15%	13%	24%
SW Florida	45%	14%	14%	25%
Polk County	54%	15%	11%	21%
RACEC	46%	15%	14%	25%

\* 10 means definitely and 1 is definitely not

# Likelihood of needing a faster internet connection in the next three years



\* 10 means definitely and 1 is definitely not

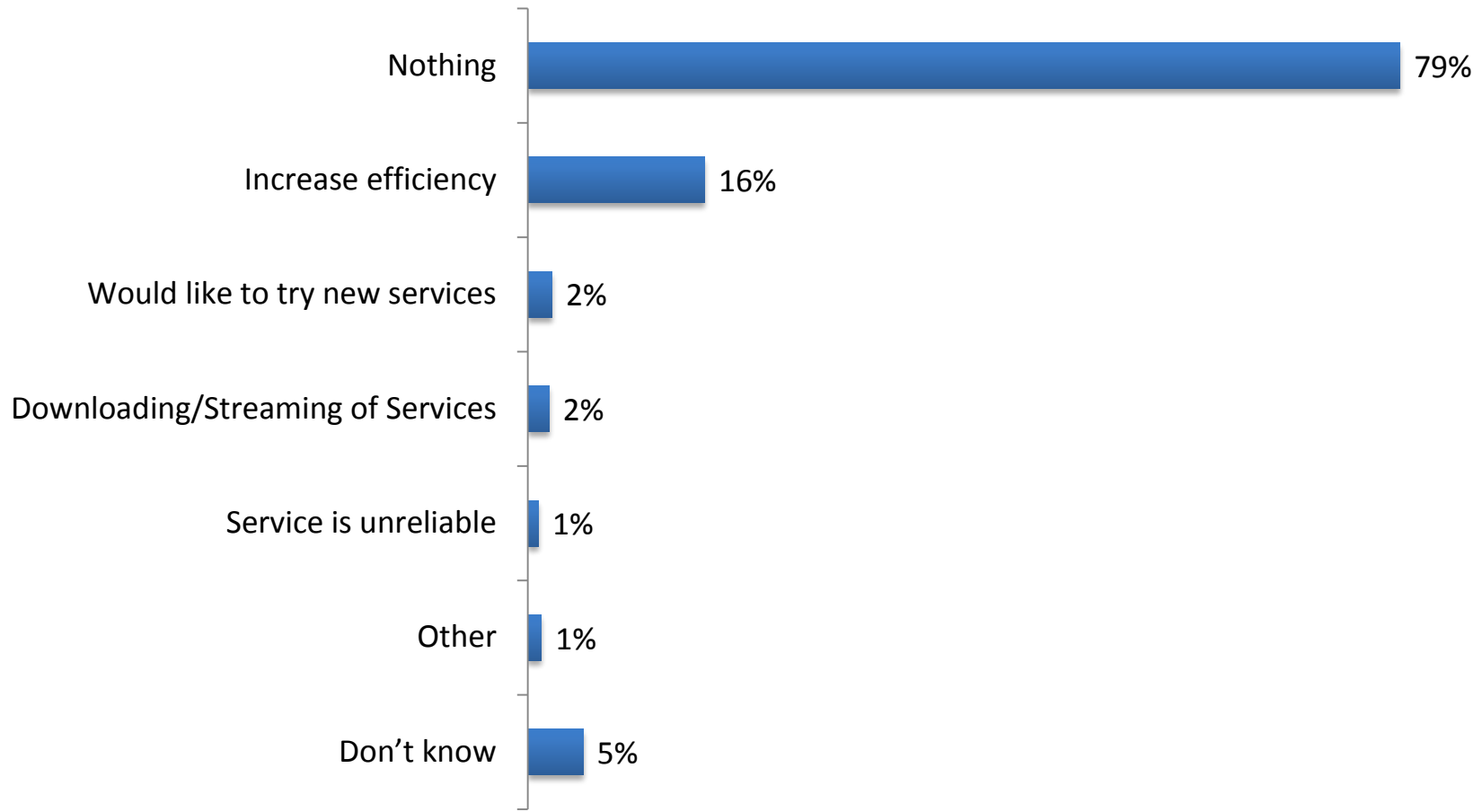


# Likelihood of needing a faster internet connection in the next three years\*

	1 to 3	4 to 6	7 to 8	9 to 10
Total	32%	17%	14%	37%
SW Florida	29%	16%	14%	42%
Polk County	38%	20%	12%	31%
RACEC	28%	15%	17%	38%

\* 10 means definitely and 1 is definitely not

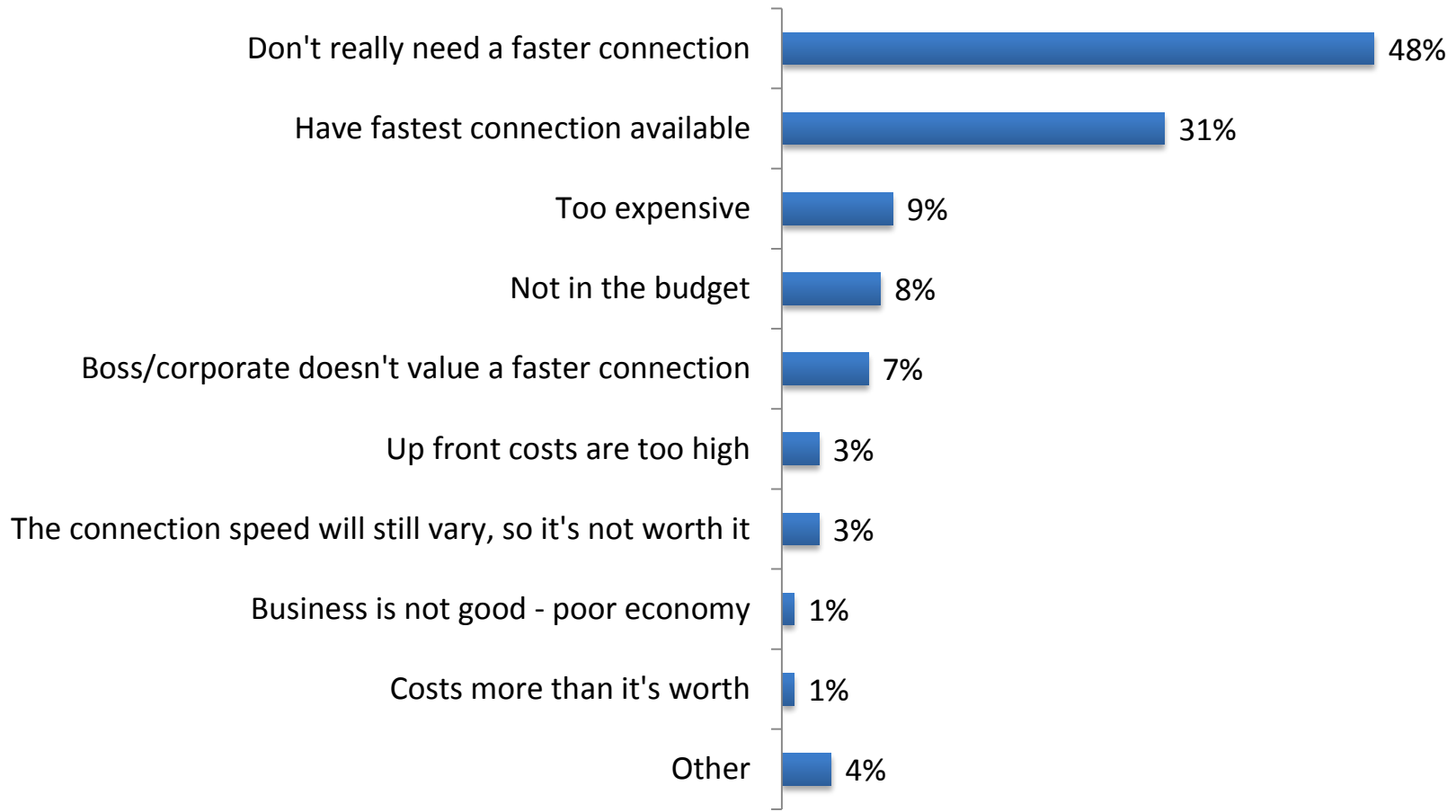
# What would your company like to do via the internet that it cannot do now because of the speed of your internet connection?\*/\*\*



\* Multiple responses permitted

\*\* Responses coded from an open-ended question

# Obstacles to getting a faster internet connection\*

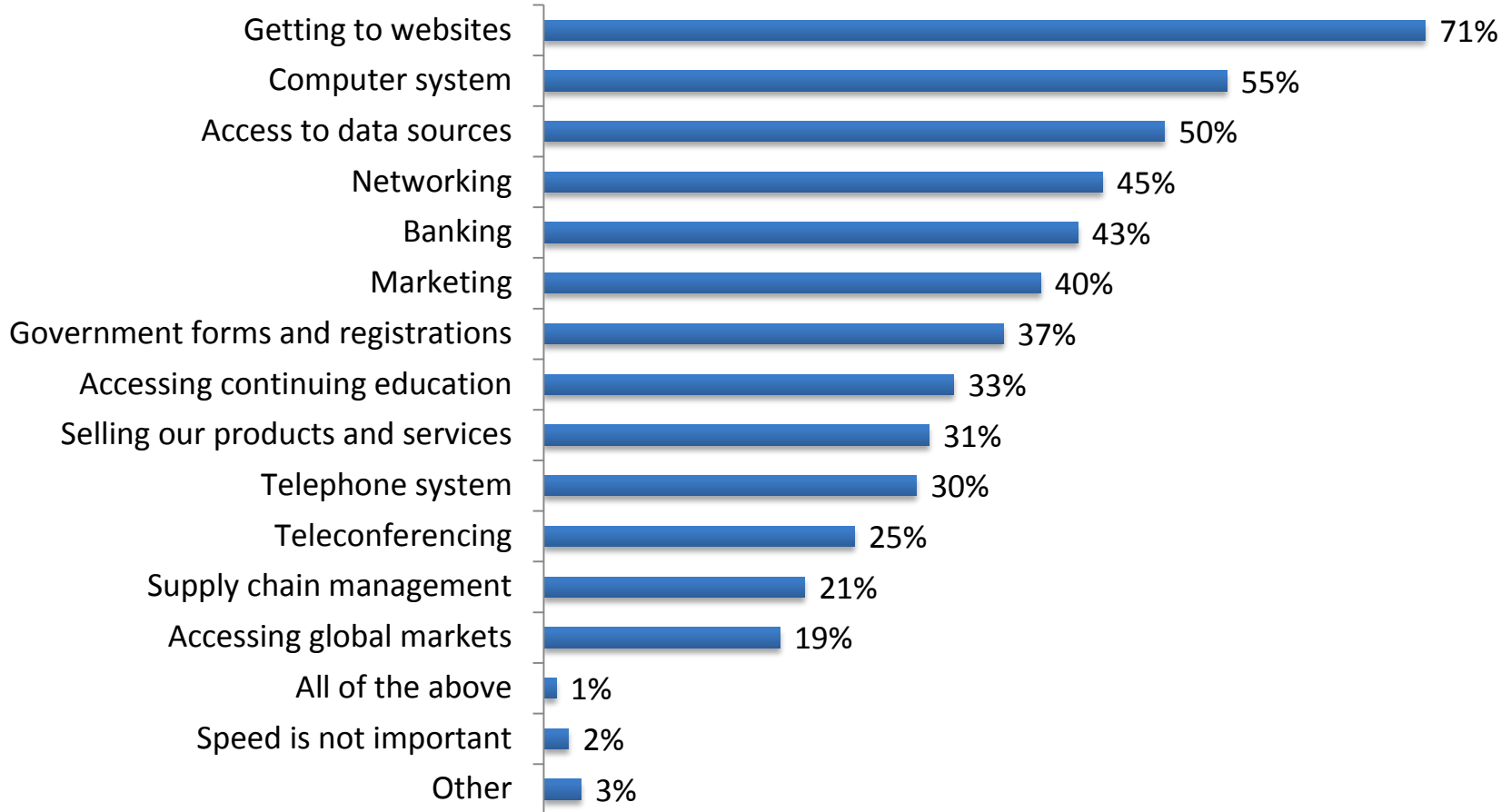


\* Multiple responses permitted

# Obstacles to getting a faster internet connection\*

	Total	SW Florida	Polk County	RACEC
Don't really need a faster connection	48%	44%	50%	48%
Have fastest connection available	31%	30%	28%	34%
Too expensive	9%	9%	8%	9%
Not in the budget	8%	6%	10%	10%
Boss/corporate doesn't value a faster connection	7%	9%	7%	4%
Up front costs are too high	3%	2%	2%	4%
The connection speed will still vary, so it's not worth it	3%	2%	3%	2%
Business is not good - poor economy	1%	1%	1%	2%
Costs more than it's worth	1%	1%	0%	2%
Other	4%	4%	4%	4%

# Why high speed internet is important to your company?

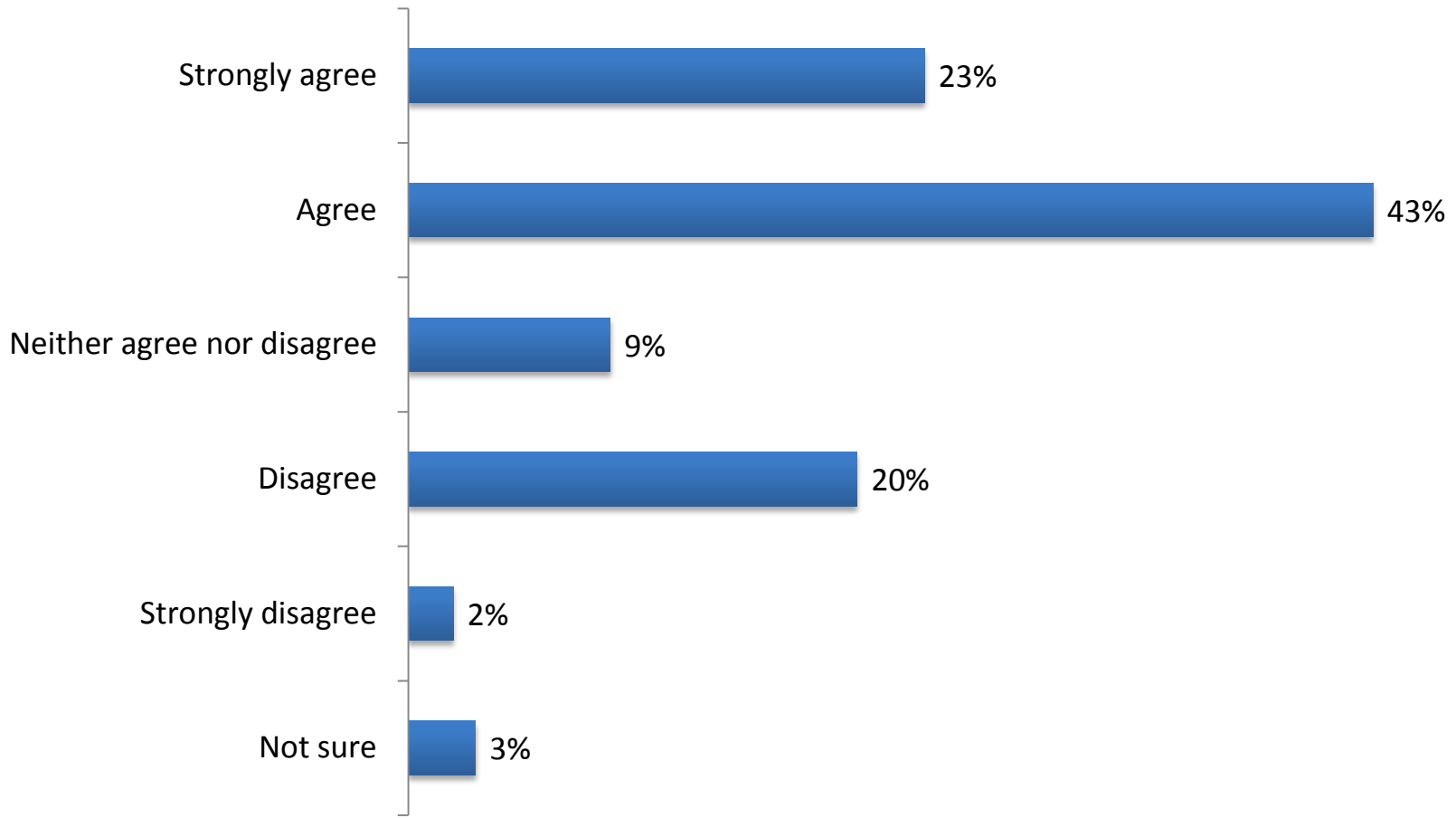


\* Multiple responses permitted

# Why is high speed internet important to your company\*

	Total	SW Florida	Polk County	RACEC
Getting to websites	71%	68%	76%	69%
Computer system	55%	52%	58%	56%
Access to data sources	50%	53%	51%	47%
Networking	45%	44%	50%	43%
Banking	43%	45%	43%	41%
Marketing	40%	48%	40%	33%
Government forms and registrations	37%	32%	38%	42%
Accessing continuing education	33%	31%	32%	37%
Selling our products and services	31%	35%	30%	28%
Telephone system	30%	28%	36%	25%
Teleconferencing	25%	27%	26%	22%
Supply chain management	21%	16%	23%	23%
Accessing global markets	19%	15%	19%	21%
Speed is not important	2%	1%	1%	3%
All of the above	1%	3%	0%	0%
Other	3%	4%	3%	3%

# A fast internet connection is critical for maintaining your company's competitiveness

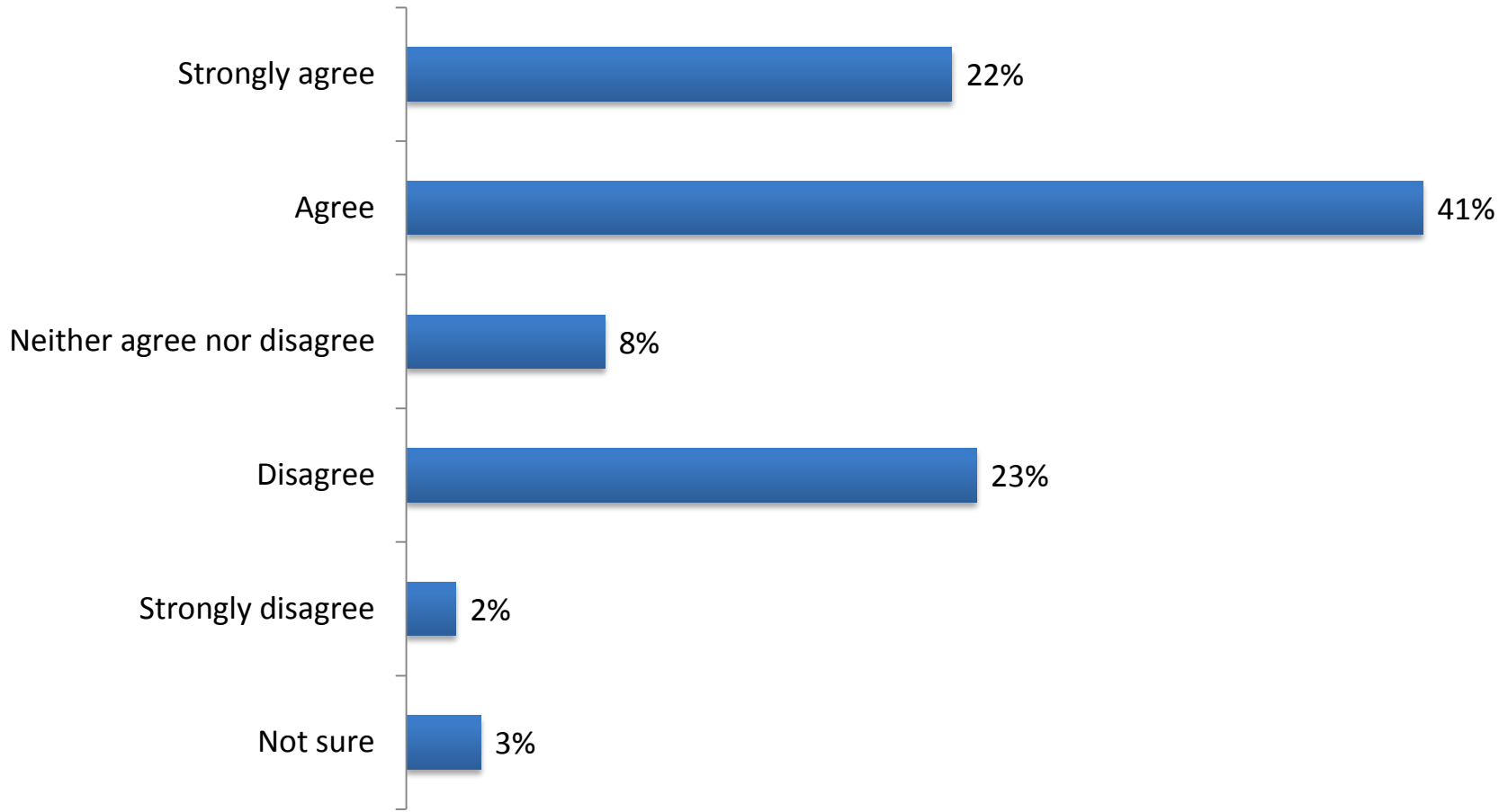


# A fast internet connection is critical for maintaining your company's competitiveness

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not sure
Total	23%	43%	9%	20%	2%	3%
SW Florida	28%	46%	8%	15%	2%	2%
Polk County	23%	43%	9%	20%	3%	3%
RACEC	20%	40%	10%	24%	2%	4%



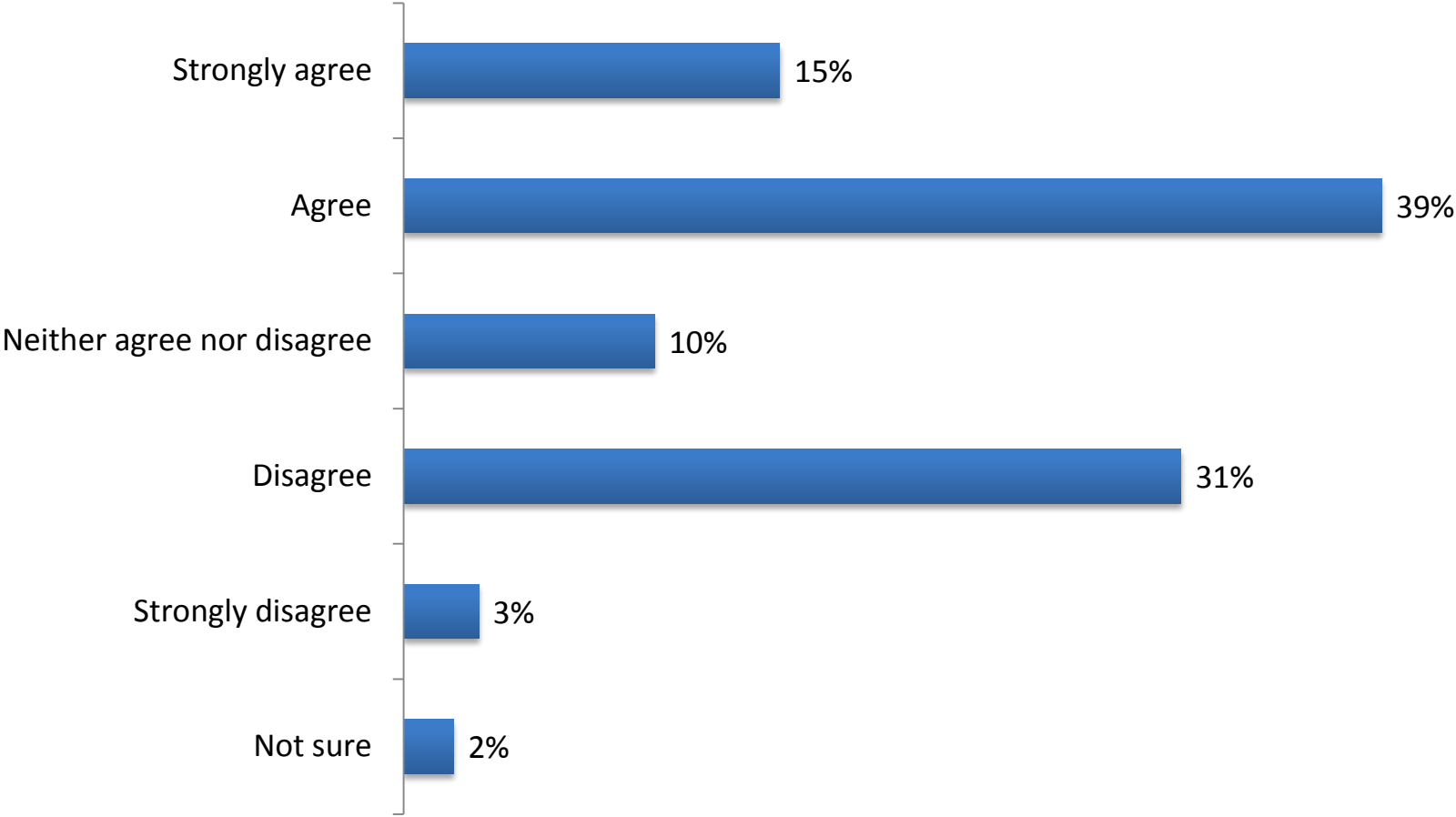
# A fast internet connection is critical for being able to produce and deliver the services or products your company provides to customers



# A fast internet connection is critical for being able to produce and deliver the services or products your company provides to customers

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not sure
Total	22%	41%	8%	23%	2%	3%
SW Florida	22%	46%	9%	19%	1%	3%
Polk County	22%	39%	9%	23%	4%	2%
RACEC	21%	38%	7%	28%	2%	4%

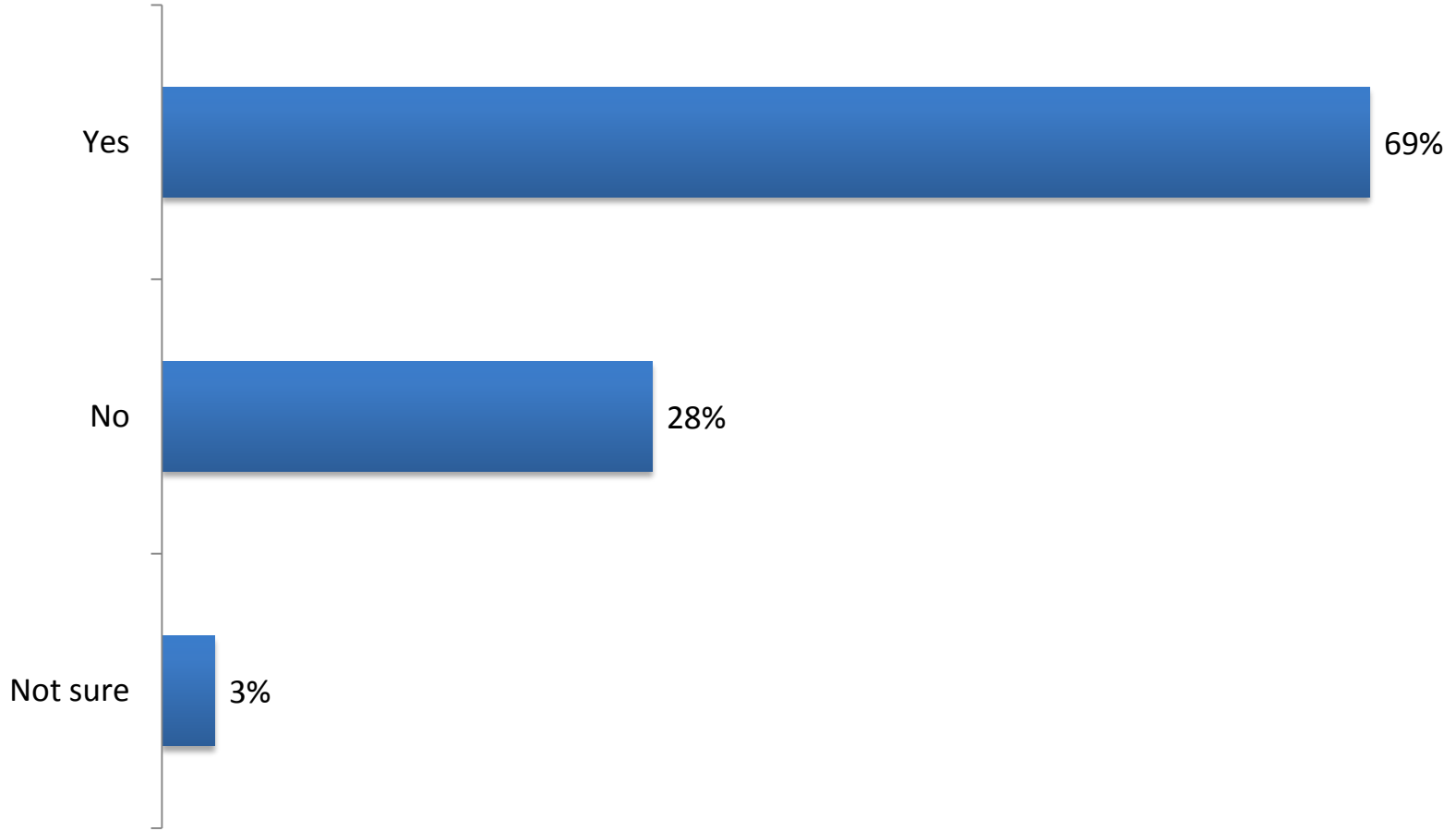
# A fast internet connection is critical for the survival of your company



# A fast internet connection is critical for the survival of your company

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not sure
Total	15%	39%	10%	31%	3%	2%
SW Florida	18%	39%	11%	28%	2%	2%
Polk County	14%	43%	9%	29%	4%	2%
RACEC	12%	35%	9%	38%	3%	3%

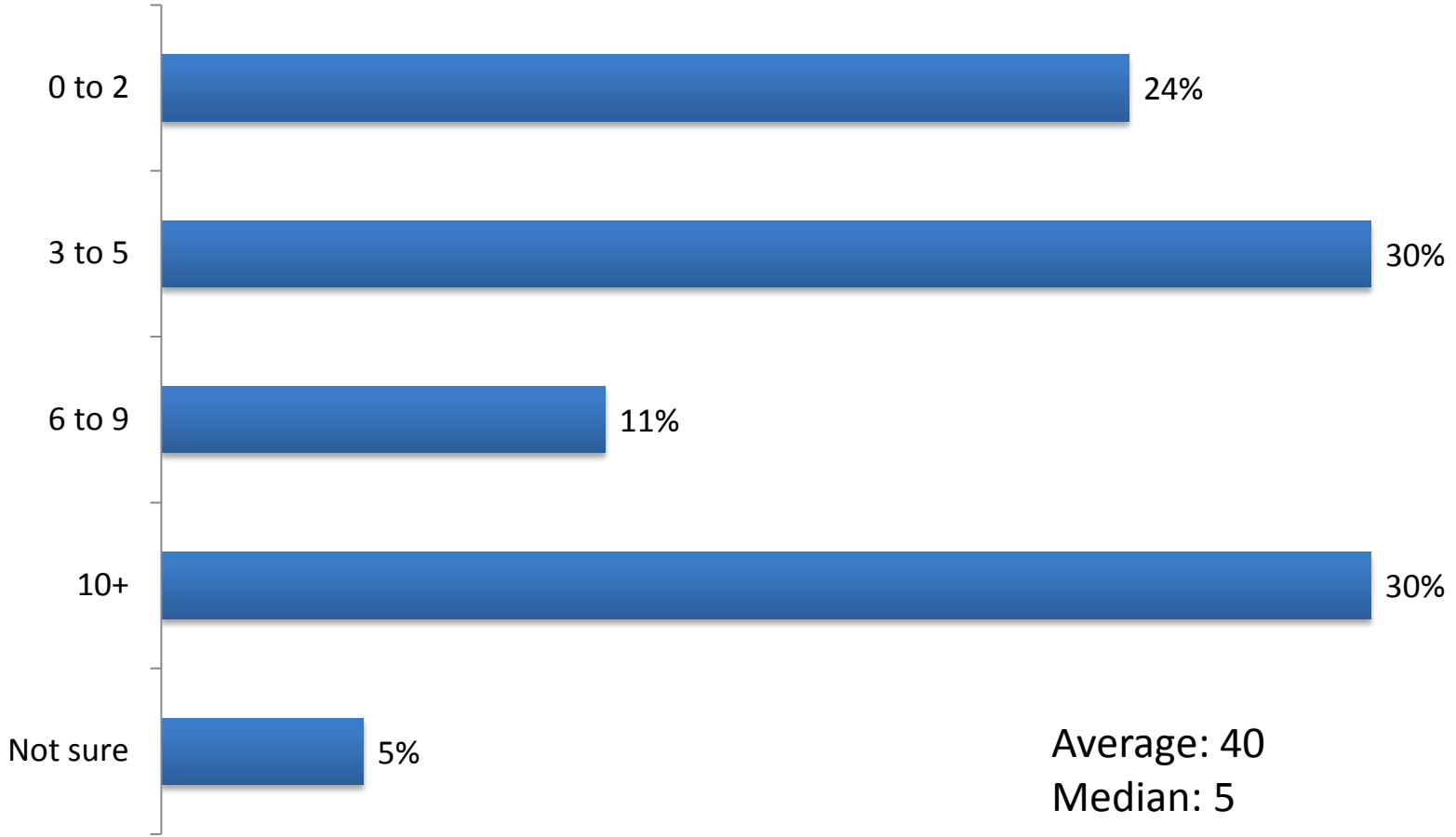
# Wi-Fi connection



# Wi-Fi connection

	Yes	No	Not sure
Total	69%	28%	3%
SW Florida	72%	23%	5%
Polk County	72%	26%	1%
RACEC	63%	34%	3%

# Number of devices that connect to the internet

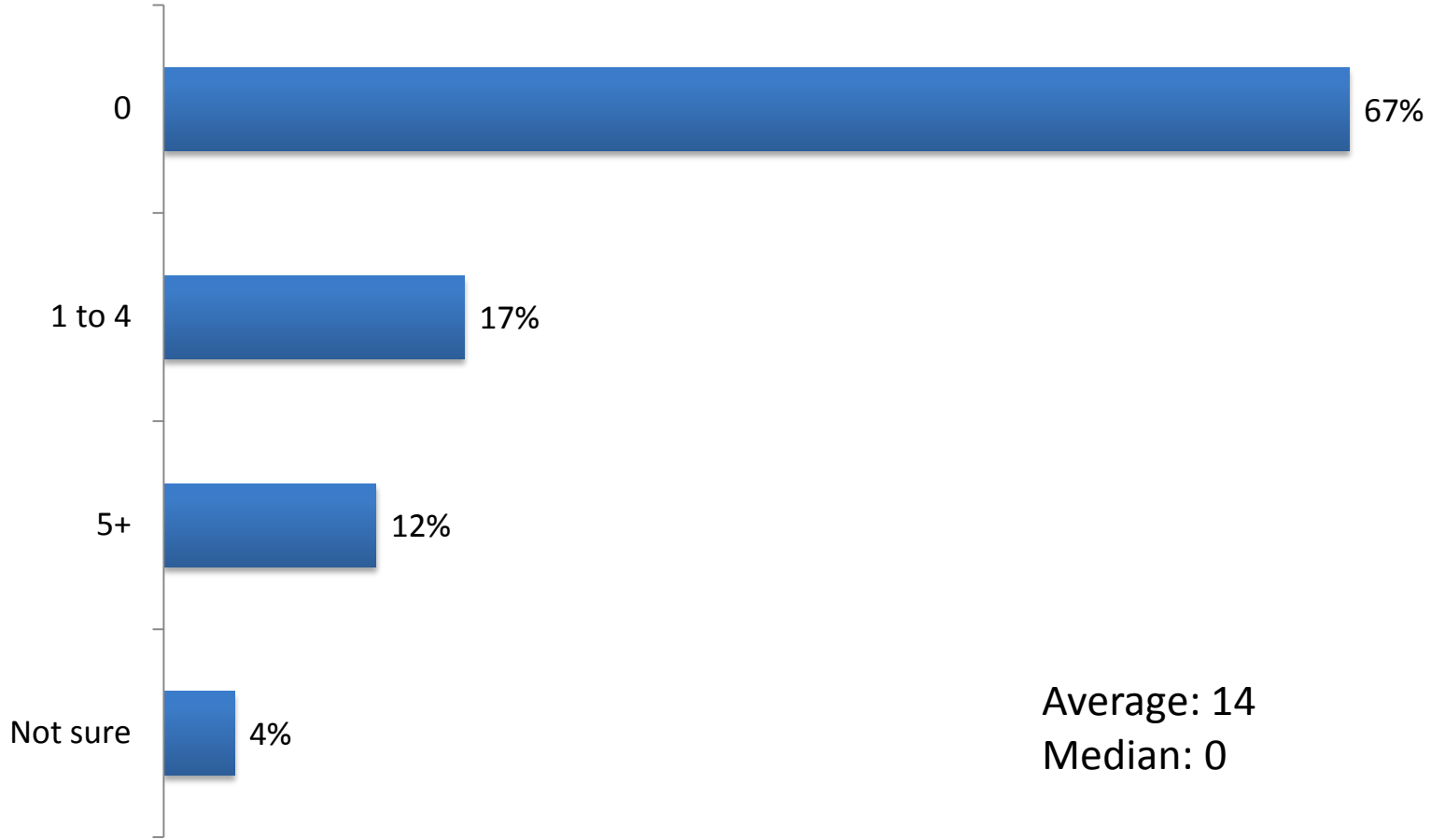


# Number of devices that connect to the internet

	0 to 2	3 to 5	6 to 9	10+	Not sure
Total	24%	30%	11%	31%	4%
SW Florida	23%	25%	13%	35%	5%
Polk County	24%	30%	11%	32%	4%
RACEC	26%	36%	10%	25%	4%



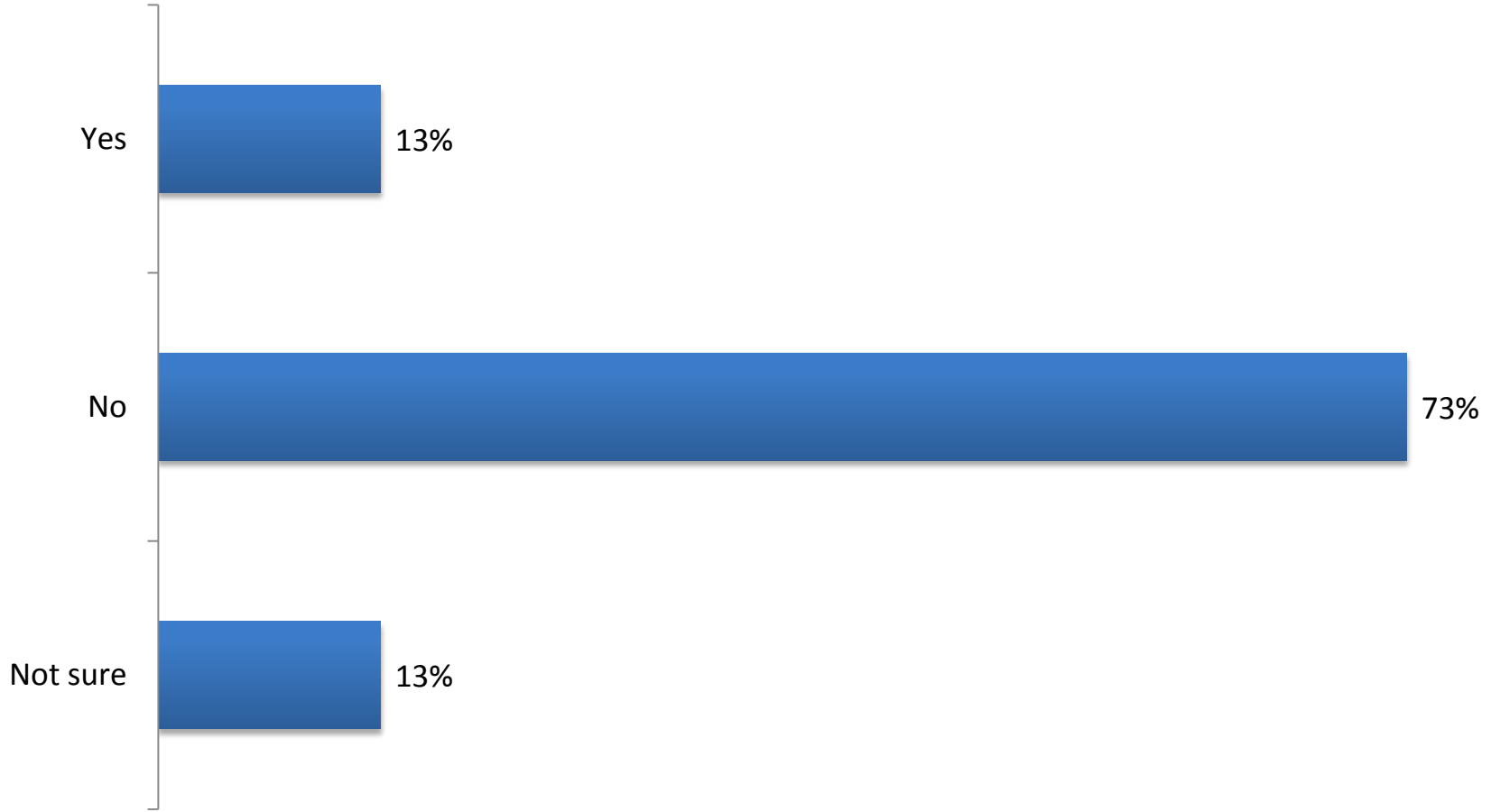
# Number of devices your company plans to buy in the next year that connect to the internet



# Number of devices your company plans to buy in the next year that connect to the internet

	0	1 to 4	5+	Not sure
Total	67%	17%	12%	4%
SW Florida	65%	14%	15%	5%
Polk County	67%	19%	11%	4%
RACEC	68%	17%	11%	3%

# Do you know the download and upload speeds of your internet connection?



# Do you know the download and upload speeds of your internet connection?

	Yes	No	Not sure
Total	13%	73%	13%
SW Florida	13%	74%	13%
Polk County	10%	79%	11%
RACEC	17%	67%	16%

# Willingness to check upload and download speeds



# Willingness to check upload and download speeds

	Yes	No
Total	6%	94%
SW Florida	8%	92%
Polk County	5%	95%
RACEC	5%	95%

# Approximate Mbps for download speed\*

Download speed in Mbps	
Mean	37
5 <sup>th</sup> Percentile	1
25 <sup>th</sup> Percentile	4
50 <sup>th</sup> Percentile	10
75 <sup>th</sup> Percentile	25
95 <sup>th</sup> Percentile	100

\* For business that knew the download speed or were willing to visit [speedtest.net](http://speedtest.net)

# Approximate Mbps for download speed\*

	Total	SW Florida	Polk County	RACEC
Mean	37	57	41	19
5 <sup>th</sup> Percentile	1	2	1	1
25 <sup>th</sup> Percentile	4	10	4	3
50 <sup>th</sup> Percentile	10	18	12	10
75 <sup>th</sup> Percentile	25	38	40	10
95 <sup>th</sup> Percentile	100	207	100	100

\* For business that knew the download speed or were willing to visit [speedtest.net](http://speedtest.net)



# Approximate Mbps for upload speed\*

Upload speed in Mbps	
Mean	122
5 <sup>th</sup> Percentile	0
25 <sup>th</sup> Percentile	1
50 <sup>th</sup> Percentile	7
75 <sup>th</sup> Percentile	21
95 <sup>th</sup> Percentile	200

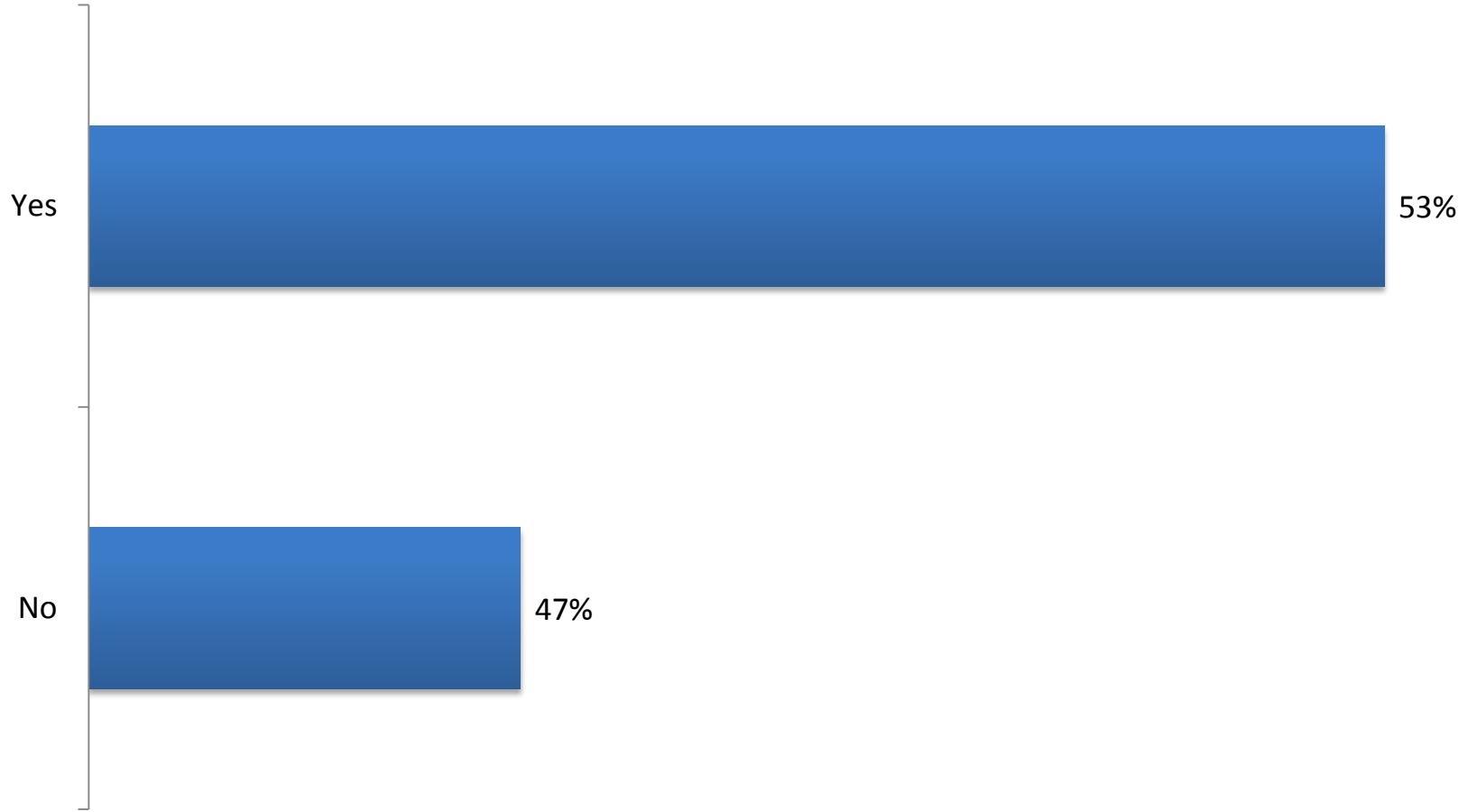
\* For business that knew the upload speed or were willing to visit [speedtest.net](http://speedtest.net)

# Approximate Mbps for upload speed\*

	Total	SW Florida	Polk County	RACEC
Mean	122	49	330	46
5 <sup>th</sup> Percentile	0	2	1	0
25 <sup>th</sup> Percentile	1	4	1	1
50 <sup>th</sup> Percentile	7	10	9	3
75 <sup>th</sup> Percentile	21	24	36	10
95 <sup>th</sup> Percentile	200	109	700	200

\* For business that knew the upload speed or were willing to visit [speedtest.net](http://speedtest.net)

# Does your company have computers?\*



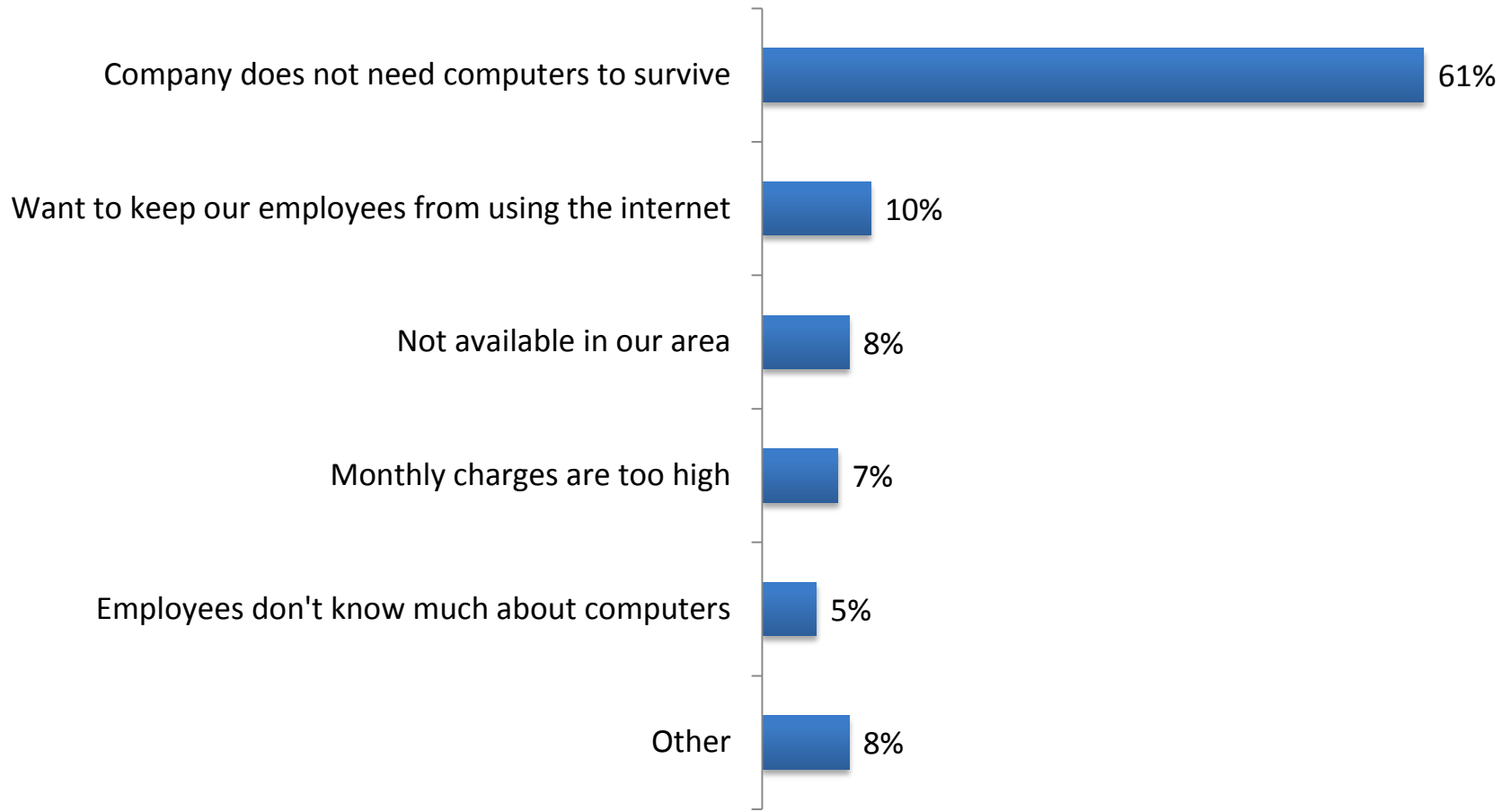
\* Only businesses that did not have an internet connection answered this question

# Does your company have computers?\*

	Yes	No	Not sure
Total	53%	47%	0%
SW Florida	57%	43%	0%
Polk County	53%	47%	0%
RACEC	47%	53%	0%

\* Only businesses that did not have an internet connection answered this question

# Number one reason your company does not have internet service\*



\* Only businesses that did not have an internet connection answered this question

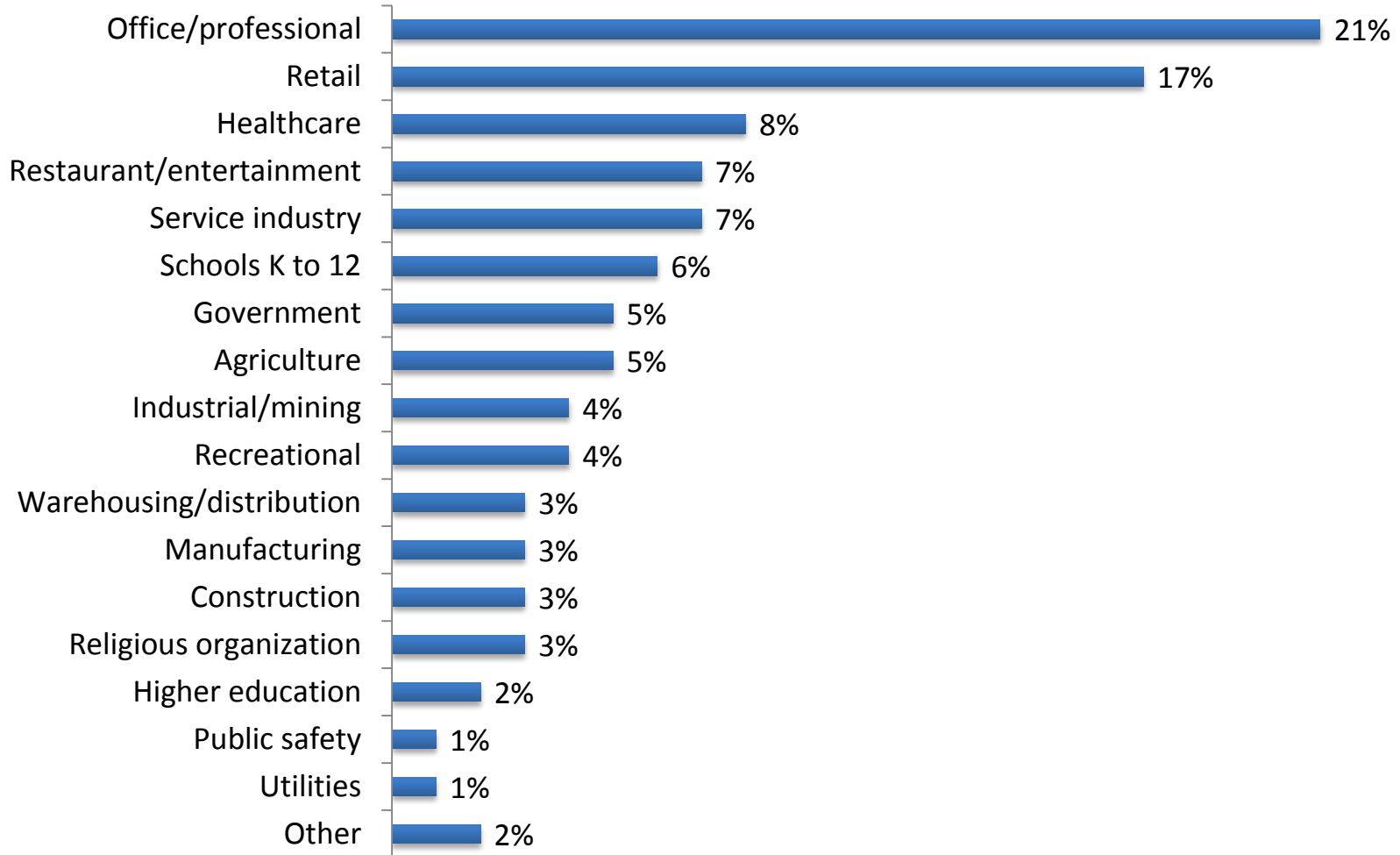
# Number one reason your company does not have internet service

	Total	SW Florida	Polk County	RACEC
Company does not need computers to survive	61%	57%	58%	71%
Want to keep our employees from using the internet	10%	13%	11%	6%
Not available in our area	8%	4%	21%	0%
Monthly charges are too high	7%	4%	11%	6%
Employees don't know much about computers	5%	4%	0%	12%
Upfront costs are too high	0%	0%	0%	0%
Too much money for what you get	0%	0%	0%	0%
Slow connection in our area	0%	0%	0%	0%
Other	8%	17%	0%	6%

\* Only businesses that did not have an internet connection answered this question

# Business Profile

# Business sector





# Business Sector

	Total	SW Florida	Polk County	RACEC
Office/professional	21%	29%	21%	13%
Retail	17%	15%	19%	17%
Healthcare	8%	9%	7%	8%
Restaurant/ entertainment	7%	7%	6%	7%
Service industry	7%	9%	7%	4%
Schools K to 12	6%	6%	6%	5%
Government	5%	2%	5%	8%
Agriculture	5%	1%	3%	12%
Industrial/mining	4%	3%	7%	2%
Recreational	4%	6%	2%	6%
Warehousing/ distribution	3%	2%	5%	1%
Manufacturing	3%	2%	5%	2%
Construction	3%	4%	2%	3%
Religious organization	3%	0%	3%	5%
Higher education	2%	2%	1%	2%
Public safety	1%	0%	0%	2%
Utilities	1%	0%	0%	1%
Other	2%	2%	2%	2%

# Gender



# Gender

	Male	Female
Total	45%	55%
SW Florida	50%	50%
Polk County	48%	52%
RACEC	36%	64%