

Broadband Survey of NH Businesses: Overview

May 2018

In late 2017 into early 2018, the University of New Hampshire (UNH) Survey Center conducted a broadband survey for Live Free and Start, the NH Broadband Mapping & Planning Program at UNH, and the NH Division of Economic Development. The survey collected data from businesses across the state on various characteristics of their primary business, their current broadband access, and their expected future broadband requirements. The survey results will be used to help inform economic development planning efforts, to attract and retain businesses in the state, and to assist public policy makers to make decisions that enhance and remove barriers to the availability, adoption, and affordability of broadband throughout the State of New Hampshire.

For the first phase of the survey, contact information for 5,000 randomly selected businesses was purchased from Dun & Bradstreet. These businesses were contacted via telephone to obtain email addresses; 531 supplied addresses, yielding an initial response rate of 11%. Of these, 186 individuals completed the survey, for a completion rate of 35%. For the second phase, the survey was distributed via email to a larger group comprised of the membership of NH Chambers of Commerce, as well as to members of a number of nongovernmental organizations. From this second distribution, 393 individuals completed the survey. Combining both methods, 579 survey responses were received. Most of these responses were from small businesses, with businesses with 1-10 employees accounting for 65% of the responses and businesses of 11-50 employees accounting for 18% of the responses. Large businesses, with more than 50 employees, represented 17% of the total businesses surveyed.

Selected findings from the survey include:

- 99% of respondents agreed that broadband is important to their primary business' current needs and 83% indicated that broadband will become more important in the next 5-10 years.
- 55% of respondents said their internet access speed is sufficient for their primary business needs today.
- 29% of respondents were home based and were unable to secure services to fit their needs because of availability and/or price.
- 44% of respondents said that faster and more reliable internet would allow more employees to work from home.
- 74% of businesses said it is important for employees be able to work from home.
- 29% of businesses said all their employees work from home some hours monthly.

Larger businesses (50+ employees) were generally satisfied with their service level agreements and were able to buy higher capacity fiber to the premise broadband services that served their needs today and will scale with their future needs. Their employees use the internet daily to communicate with each other and clients on site and from home some number of hours monthly. This speaks to a well-documented trend of working during non-traditional business hours.

Smaller businesses (1-10 employees) were more likely to be dissatisfied with their connectivity options, pricing, and reliability. They characteristically were located in rural pockets, ran their business on slower asymmetrical service, and based their provider selection decision on price rather than quality. While 55% of these businesses were on a business quality service, 22% utilized a residential service and 23% didn't know or weren't sure. Thus, although business understands the importance of broadband, many small businesses may be struggling between understanding how to use technology and running their day to day operations.

Please visit <http://iwantbroadbandnh.org> to access the survey results. The broadband business survey was funded by the New Hampshire Telecommunications Planning and Development Advisory Committee at the New Hampshire Division of Economic Development, the New Hampshire Broadband Mapping & Planning Program at UNH, and the UNH Broadband Center of Excellence.