



BAILEY BROADBAND SURVEY

Assessing the satisfaction among individuals and
businesses with current internet services

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Introduction

Since entering American homes in the early 1990s, the internet has fundamentally changed the way people work, play, learn, transact business and conduct their lives. In 2021, 85 percent of U.S. adults reported using the internet at least once per day.¹ As commerce, recreation, services and other facets of life have moved online, reliable high-speed internet connections have grown in importance. The COVID-19 pandemic accelerated trends in home internet use, with large numbers of households engaging in school and work from home.

Research finds that access to broadband internet can have positive effects on individuals and communities.² We know that broadband availability and access rates are driven by factors such as geographical disparities, deployment costs, provider competition, market demand, and socioeconomic factors.³

The experience in Park County, Colorado is consistent with these general findings: deployment lags in rural regions and demand in less-dense rural regions may not generate a sufficient revenue stream to support deployment costs from the private sector diminishing competition.

To better understand how this is impacting families and businesses in the Bailey area, the Broadband Advisory Board deployed [Bailey Broadband Survey for Residents](#) and [Bailey Broadband Survey for Business Owners](#) to register their current use, satisfaction, costs and interest in paying more for better internet services.

The survey sample is small (roughly 350 participants in an area with over 3,000 residents) yet represents the geographic diversity and a rich mix of business types and locations in the responses. The data is self-reported and speeds tests and performance can vary dramatically throughout the day and week.

Notably, the impact of economic disparities are not addressed in this report or accounted for in the responses. In future surveys, family income, number of people in a household, Medicare, food assistance, veteran status and other factors could be collected to better understand how this issue impacts vulnerable populations differently.

The survey reflects the measure of reliability and satisfaction of internet services overall – two leading benchmarks for the industry. Nearly 75% of individuals indicated their service was not reliable. An even greater number (89%) said they were not satisfied with their current service. The alarming gap in promised versus real download speeds is also demonstrated in the report findings.

Nearly all (89%) of businesses report internet being “mission critical” and more than half surveyed said they would be very likely to expand their business in the next three years if they had access to faster internet. According to the survey results, all but one businesses are willing to pay more for guaranteed high-speed internet services.

Survey Outreach

Two surveys were deployed: one designed for households with individuals and families and the other targeted to understand the needs of local businesses.

The survey was promoted through various channels to residents and businesses. Park County shared the survey link and presented to area Home Owner's Associations, the Chamber of Commerce, social media, traditional media, flyers and email.

Respondents were asked about the types of their communications services, use of the internet for various activities, and satisfaction and importance of features related to these services. As well as their willingness to pay more per month for guaranteed improvements.

Survey Results: Individuals

In which subdivision do you reside?

The survey garnered participation from 352 individuals representing most of the subdivisions targeted in the area. Below are the results of the survey for each question. (See Appendix C for raw data.) Many responses came from the Deer Creek Valley Ranchos and Elk Creek Highlands subdivisions but a very wide range of neighborhoods were represented in the total.

What type of internet service do you currently use?

Century Link is the largest ISP in the area, with almost 75% of individuals reporting as customers. RISE Broadband, Viasat and Hughes Net lag farther behind as most commonly used providers in the area.

What type of internet connection do you have?

It didn't come as a surprise that the vast majority of residents have DSL internet, followed by satellite service connections. Some reported using more than one type of internet connection in order to satisfy their demands.

Do you or someone else in your household work or study from home and does your current service support this work?

To gain a deeper understanding of the impacts of COVID-19, remote learning and working environments, the survey asked respondents to indicate if individuals were relying on internet in this way. As expected, many respondents (286) indicated this need.

Of those respondents, the majority indicated their internet service prevents them from successfully working or studying from home.

“We are barely able to work remotely and have to stagger our schedules in order to not use up all the bandwidth. My boyfriend had to turn down a better job as they did a speed test and required > 25Mbps. We desperately need better internet!”

What other types of Internet-Based Services do you purchase and for how much?

Respondents provided information about the communications services currently purchased for their households to better understand the demands on internet services. Households have a variety of communication needs with the majority relying on internet-based television services.

“This whole area is begging for faster, more reliable internet. My wife and I have been using our unreliable service the entire time we've been trying to further our educations. Our internet has quit more times than I can count. I can't even monitor my security cameras because of the bandwidth constraints in my community.”

Satisfaction with Current Service and Reliability

The findings indicate that only a quarter believe their internet is reliable and only 9% of the individuals said they are satisfied with their current internet.

“Every time it's windy or power blinks off we lose Internet for 24 hours. This has affected son's schoolwork and assignments deadlines.”

“We currently have Centurylink and before them Qwest. The cost has only gone up while the quality has only gone down. Internet constantly goes out sometimes for more than day. Centurylink is the largest internet provider in my area but, it's obvious their equipment can't handle the demand. As poor as the service is Centurylink is still a bit more reliable than the other providers, at least according to other company consumer reviews.”

Are you willing to pay more for better service?

When asked if they would be willing to pay more each month for higher speeds, the responses were overall affirming, with some excellent points made by those who were unsure or not willing to pay more.

“I would be willing to pay 100% more for reliable fast internet!”

“I already pay over \$100 per month for internet, cannot afford more.
Century link should be held to the speed they sell.”



Survey Results: Businesses

The survey garnered participation from 29 business representatives in the Bailey area. The respondents were from a rich mix of settings including retail, healthcare, professional services and restaurants. Nearly all are CenturyLink customers. Below are the results of the survey for each question. (See Appendix C for raw data.)

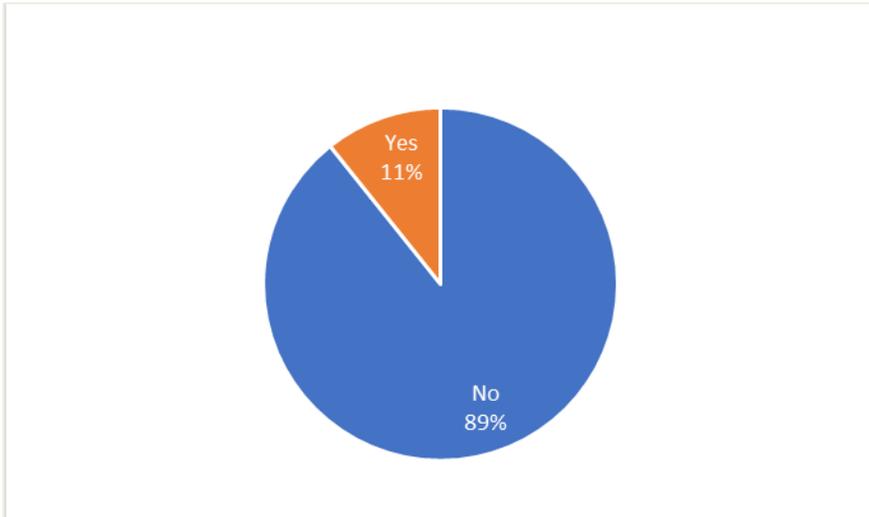
What type of business are you in?

What internet service do you currently use?

According to the survey and comments, CenturyLink is the main ISP in the area (22) and four businesses even relying on cellular data to run their operations.

Would you say your internet service is reliable?

Nearly all respondents, 89% said their internet was not reliable, while 11% felt their service was reliable. These numbers are consistent with the percent of CenturyLink customers.



“We had major internet outages last year which makes it almost impossible to do business because nearly everyone pays with cards and not cash.”

How important to your business is access to a faster internet connection?

The majority of businesses (25) surveyed described faster internet as mission critical. The other four respondents indicated it was important but not essential.

If you had access to a faster internet connection, how likely would you be to expand your business in the next 3 years?

More than half surveyed said they would be very likely to expand their business in the next three years if they had access to faster internet. These are the number of responses for each: Not likely (1), I'm not sure (2), Maybe (10), and Very likely (16).

“To date, we've been unable to secure internet from any providers due to a lack of capacity. This has been extremely challenging and has impacted our desire to invest further in Park County.”

Would you be willing to pay 10% to 15% more per month for your internet service if you were guaranteed higher speed and more reliable service?

The overwhelming response was “yes” to this question with one respondent unsure. Businesses surveyed indicate that a small increase in the cost would be worth the benefit by a 28:1 margin.

CONCLUSION

High-speed broadband is increasingly important for families and businesses and the majority of those surveyed in the Bailey area are looking for something better. But with just one or two providers in the area, choices are few, service is unreliable and prices continue to climb.

Over 300 individuals helped us understand the many ways they want to rely on their internet services. Availability, reliability and satisfaction continue to be the main pain points for residents. Many are paying for services that don't meet their educational, entertainment and professional needs.

For businesses, the lack of internet may be stifling growth and stunting the overall economic expansion of this area of the county. Nearly half of all businesses said they would expand in the next three years if their internet was improved. And all but four businesses said internet was not just important, but "mission critical" to their operations.

While the need and demand are clear, recent developments in federal policy—particularly the flexible funding provided under ARP and the potential for additional infrastructure dollars earmarked for broadband—provide an important opportunity for states and counties to craft an ambitious and detailed broadband strategy. A high-speed future for the Bailey area would need to be designed to:

- Fast-track universal availability of the highest-speed connections to businesses;
 - Enhance access for all households; and
 - Improve affordability, particularly for low-income residents and vulnerable populations.
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ENDNOTES

1 Andrew Perrin and Sara Atske, “About three-in-ten U.S. adults say they are ‘almost constantly’ online,” Pew Research Center, March 26, 2021, available at <https://www.pewresearch.org/fact-tank/2019/07/25/americans-going-online-almost-constantly>.

2 See discussion in Krishna Jayakar, et. al, “Broadband 2021,” Report of the Interdisciplinary Workshop on the Development of a National Broadband Research Agenda, July 25, 2016, organized by the Institute for Information Policy, Penn State University, available at <https://par.nsf.gov/servlets/purl/10061643>.

3 OpenVault, *Broadband Insights Report*, Q4 2020, available at https://openvault.com/NEW-SITE-OV3/wp-content/uploads/2021/02/OpenVault_OVBI_Q420.pdf.

4 U.S. Census Bureau, Household Pulse Survey, Week 27: March 17 – March 29. Education Table 2 and Transportation Table 1, available at <https://www.census.gov/data/tables/2021/demo/hhp/hhp27.html#tables>.

5 Federal Communications Commission (FCC), *Fourteenth Broadband Deployment Report*, January 2021, Appendix A, pg. 60, available at <https://docs.fcc.gov/public/attachments/FCC-21-18A1.pdf>.

6 Christopher Reddick, et. al, “Determinants of broadband access and affordability: An analysis of a community survey on the digital divide,” National Center for Biotechnology Information, National institutes of Health, September 9, 2020, pg. 3, table 1, available at <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7480260>.

7 Colorado Broadband Map shows broadband availability in Colorado. The map can be used to search broadband service providers and view broadband speeds available at: <https://gis.colorado.gov/broadbandviewer/>.

APPENDIX A: [Letter of Support](#), Platte Canyon Chamber of Commerce



July 1, 2022

Commissioners Elsner, Douglas and Mitchell,

I am writing to you in my capacity as President of the Platte Canyon Area Chamber of Commerce. Our chamber covers the businesses located in Bailey, Shawnee, and a portion of Pine. Our businesses need broadband service desperately.

Internet access is a large and ongoing issue for all our brick-and-mortar businesses. The only internet access currently is CenturyLink for our businesses. The service provided by CenturyLink is less than adequate on a regular basis. There are times throughout the year when there is no internet from CenturyLink and the outages can sometimes last for multiple days. Currently, CenturyLink is not doing any upgrades to systems currently in place. With the speed of technology advances, this is unacceptable.

As technology has progressed, credit card usage by consumers is nearly 100%. All the businesses in downtown Bailey are dependent on the tourist dollar with the peak of tourism being during the summer. When the internet goes down, businesses are not able to use their credit card machines and many consumers do not have the cash in their wallets to purchase items. This is causing our businesses to suffer economically and has an impact on sales tax being collected which should be a concern to you as the Commissioners of Park County.

Broadband service for our business community would allow them to generate revenue consistently and not be at the mercy of CenturyLink. Tourists to our community would be satisfied in knowing they can make all the purchases they desire. It is important that the Bailey area be as technologically advanced as the other towns we compete with for tourist dollars along the 285 corridor.

The businesses of the Platte Canyon Area of Commerce ask that you assist in providing broadband to our community.

Regards

Robb Green

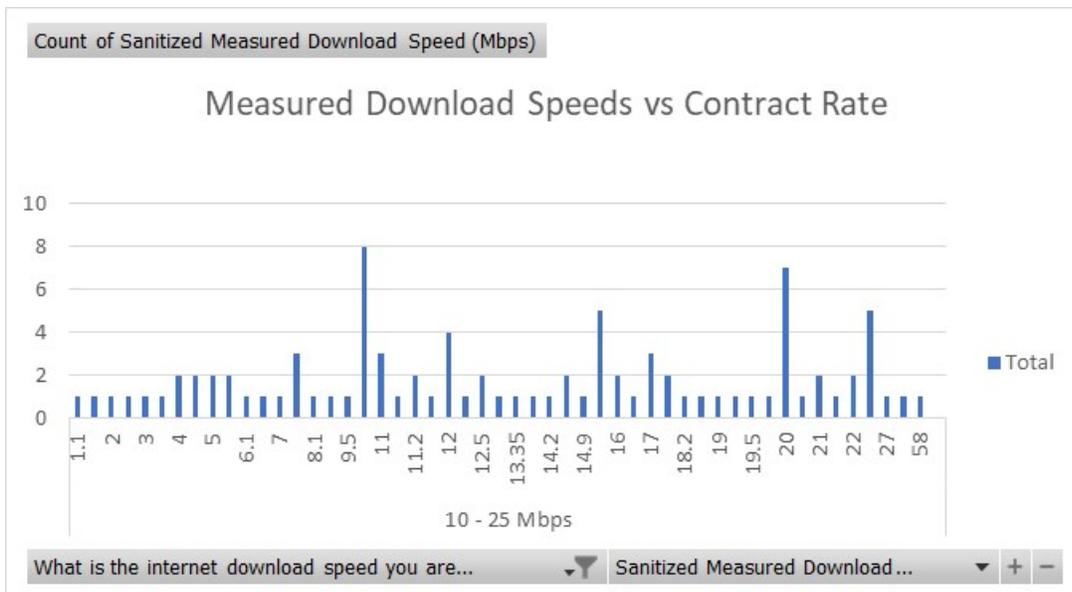
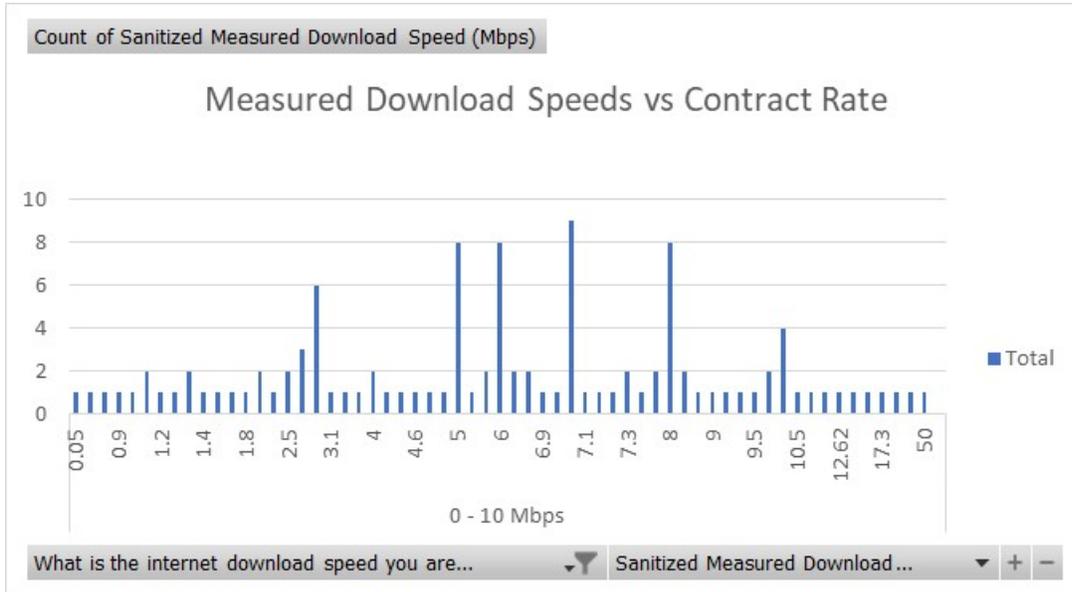
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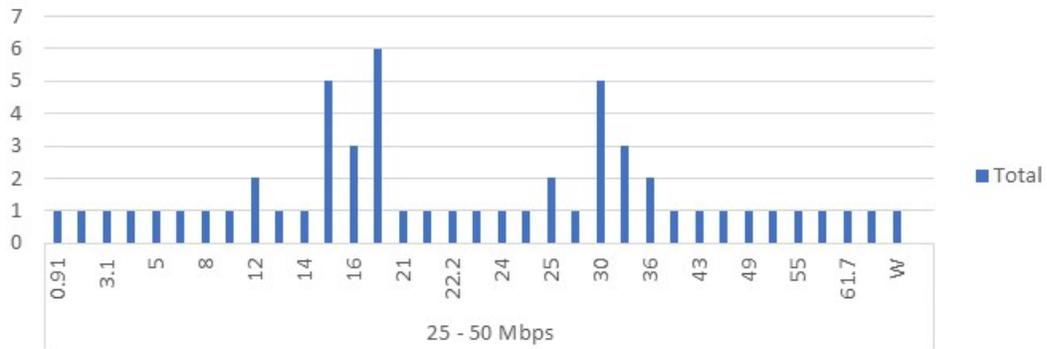
APPENDIX D: Additional Figures

The following tables attempted to study the measured speeds versus what the promised or contracted speeds. The vertical axis is number of residents reporting download data rate shown on horizontal axis. Each chart represents a range of speeds, 0-10, 10-25, 25-50 and so on.



Count of Sanitized Measured Download Speed (Mbps)

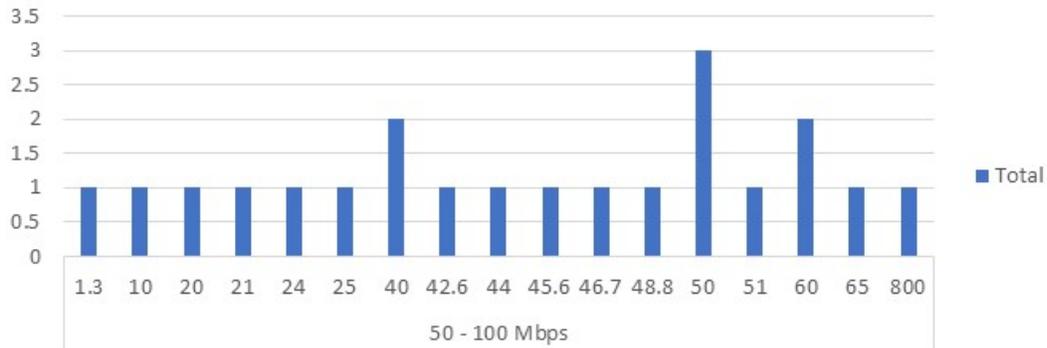
Measured Download Speeds vs Contract Rate



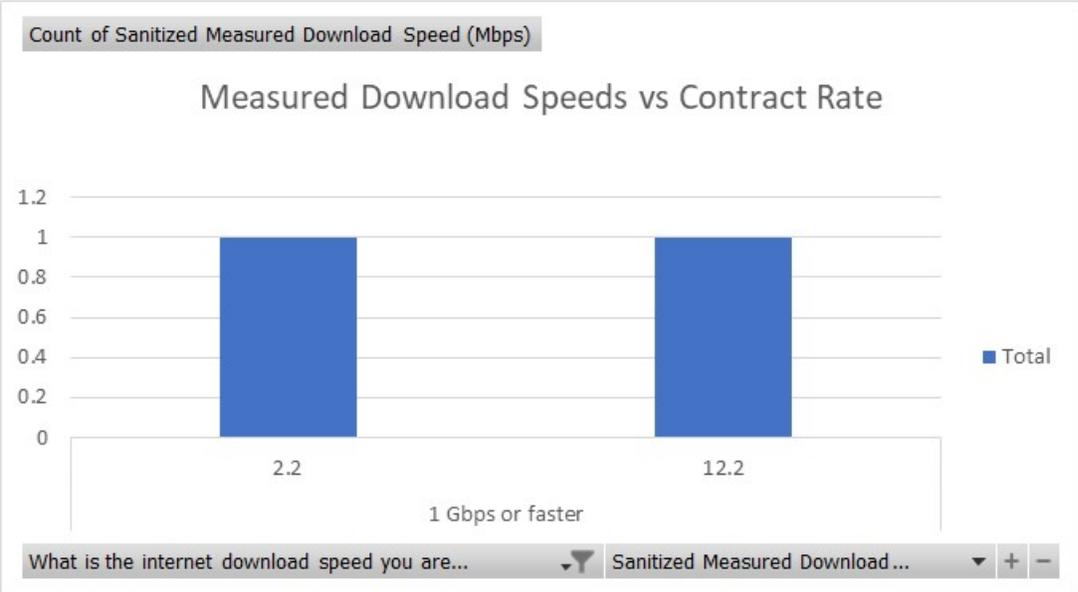
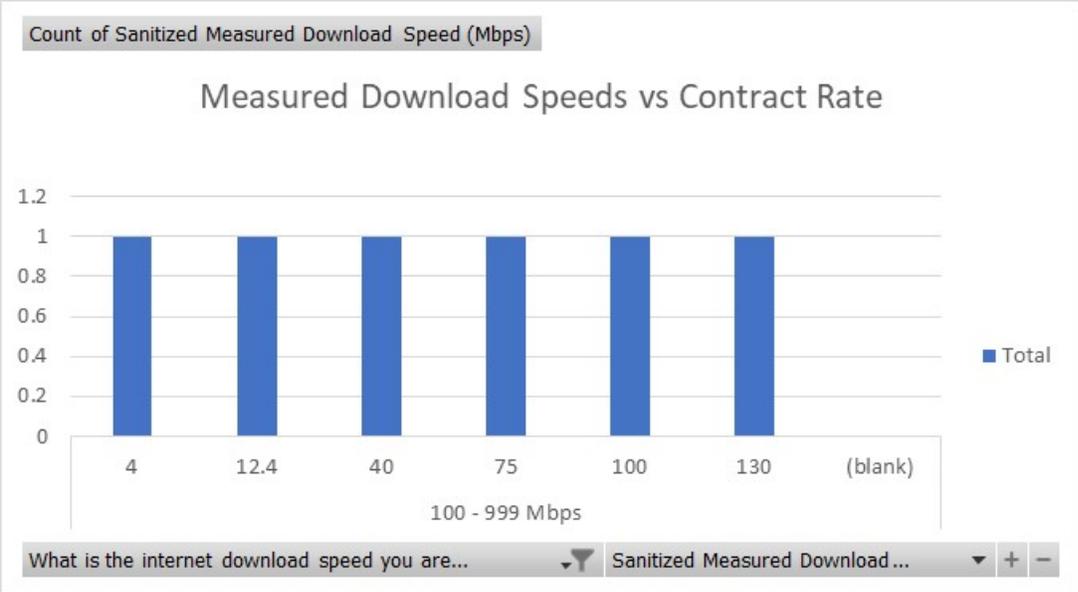
What is the internet download speed you are... Sanitized Measured Download... + -

Count of Sanitized Measured Download Speed (Mbps)

Measured Download Speeds vs Contract Rate



What is the internet download speed you are... Sanitized Measured Download... + -



For more information on Park County's Broadband Initiative
please visit www.parkco.us.

