

Economic Development Leader Survey

West Virginia's Need for Broadband Infrastructure

Conducted April 26 - May 3, 2011

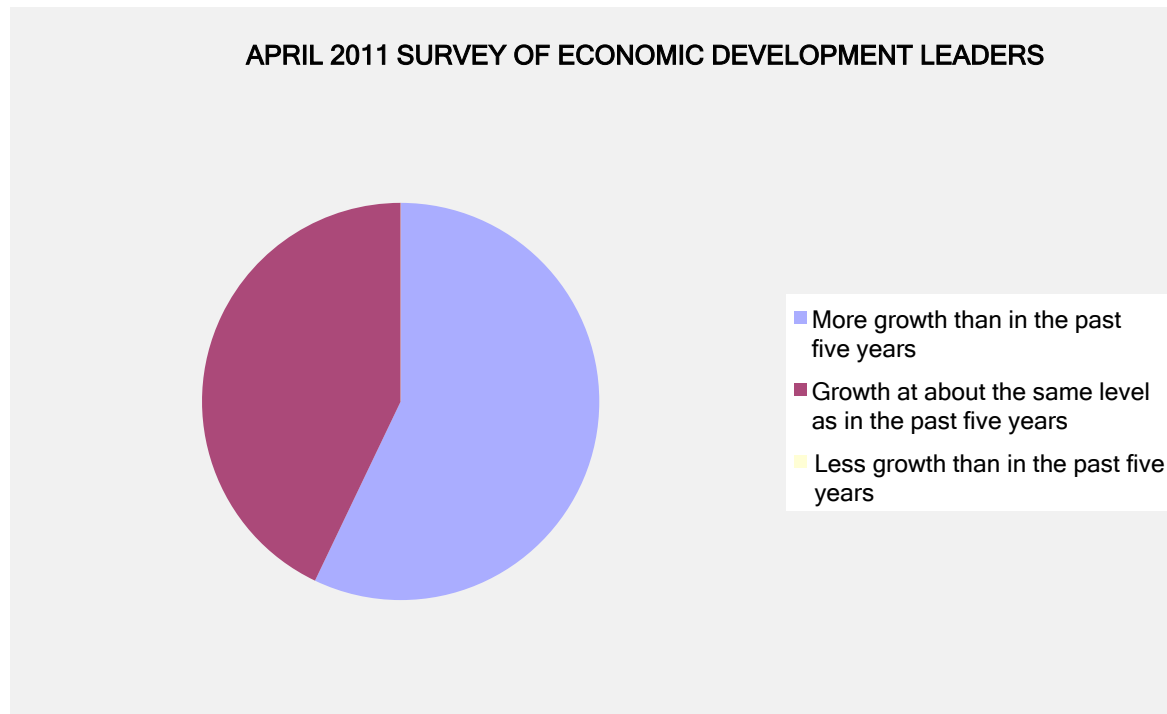


Survey information

- **This online survey was conducted between April 26 and May 3, 2011. The questionnaire was e-mailed to 57 West Virginia professionals who have economic development responsibilities across the state.**
- **The list of those professionals was obtained from the official website of the West Virginia Department of Commerce. Twenty-eight of the 57 responded by the May 3rd deadline, a response rate of 49 percent.**
- **The survey was conducted by Jack Canfield, LLC, of Charleston using SurveyMonkey online computer survey program. Respondents were not identified individually, and only the cumulative results were totaled.**
- **The survey was conducted on behalf of Citynet of Bridgeport, West Virginia.**

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As you assess the outlook for economic development and job growth in your region during the next five years, do you expect:		
Answer Options	Response Percent	Response Count
More growth than in the past five years	57.1%	16
Growth at about the same level as in the past five years	42.9%	12
Less growth than in the past five years	0.0%	0
<i>answered question</i>		28
<i>skipped question</i>		0



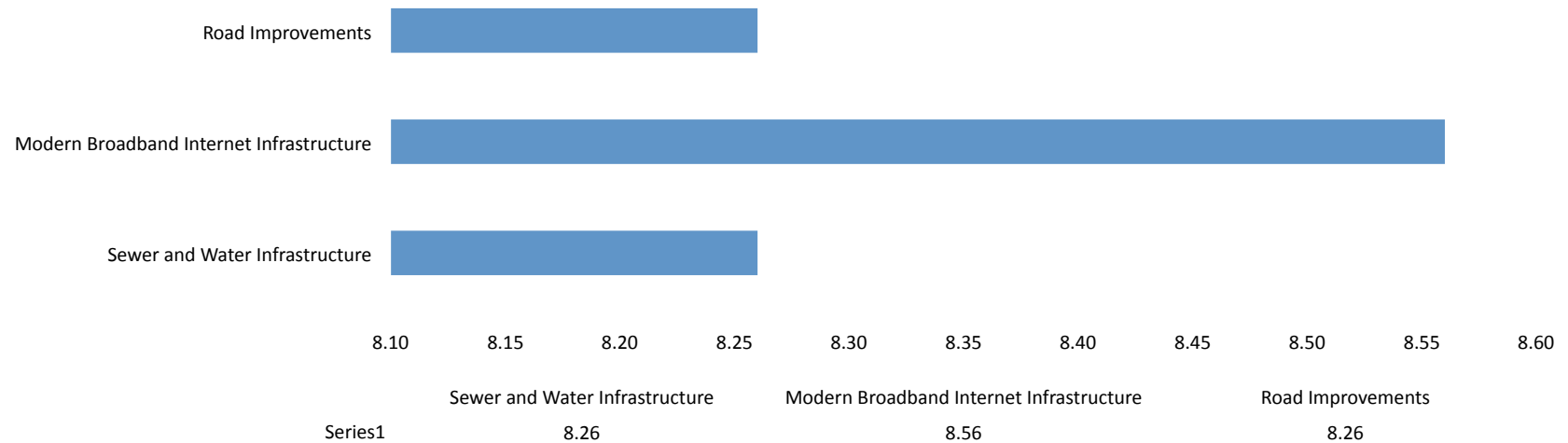
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What do you think is the greatest strength of your region when it comes to developing jobs?		
Answer Options		Response Count
		27
<i>answered question</i>		27
<i>skipped question</i>		1
Number	Response Date	Response Text
1	May 3, 2011 9:36 PM	Workforce
2	May 2, 2011 7:27 PM	Infrastructure and available developable land
3	May 2, 2011 7:14 PM	The desire of those in charge.
4	May 2, 2011 6:51 PM	location
5	May 2, 2011 6:16 PM	location and proximaty to metropolitan areas in relatively undeveloped areas
6	May 2, 2011 6:08 PM	infrastructure and a trained workforce
7	May 2, 2011 6:07 PM	Work ethic
8	May 2, 2011 4:16 PM	Transportation, warehousing and distribution.
9	May 2, 2011 2:27 PM	WVU, FSU, Pierpont; NCWV Airport and the aerospace industry, high technology jobs.
10	Apr 28, 2011 3:52 AM	The greatest strength in our region has to be the easy access to outdoor recreation
11	Apr 27, 2011 9:19 PM	natural and scenic resources that can leverage tourism development
12	Apr 27, 2011 8:48 PM	In our region, I believe leadership from the various educational and business groups can work together for positive change.
13	Apr 27, 2011 8:01 PM	Talented Labor Force / presence of WVU
14	Apr 27, 2011 6:20 PM	Location. Our history with knowing how to work with industry. We also have great tax incentives and have created a great business friendly enviroment.
15	Apr 27, 2011 2:28 PM	Workforce that is willing to learn new trades.
16	Apr 27, 2011 2:19 PM	Talent Collection of existing educational, health care and federal research facilities Proximity to metro areas (Pittsburgh and D.C.) Quality of place
17	Apr 27, 2011 2:00 PM	Natural Gas Industry
18	Apr 27, 2011 12:47 PM	Quality of Life
19	Apr 27, 2011 12:32 PM	Quality of local workforce
20	Apr 27, 2011 12:04 PM	we have industrial sites / rail / rivers / highway / retail should be unlimited with all the attractions we have put inplace we have vision
21	Apr 27, 2011 12:44 AM	natural resources
22	Apr 26, 2011 9:17 PM	Workforce
23	Apr 26, 2011 8:47 PM	population density 1,800,000 population within 50 miles.
24	Apr 26, 2011 8:42 PM	Chemical manufacturing tradition, history, and base ... Collaboration among various groups and organizations in government, nonprofit sector, education, business community, etc.
25	Apr 26, 2011 8:29 PM	Access to business information through the Department of Commerce, especially, Small Business Development, tax info, incentive programs, and probably most of all the employee training dollars available. From a quality of life standpoint, this region offers some of the best in the state (Eastern Seaboard). Cost of living and doing business in the region is excellent. Being adjacent to Maryland, we offer some significant advantages including a lower cost of electricity (ie, 30% lower than Md.
26	Apr 26, 2011 8:13 PM	Growing the Biometric and Identity management industry. Much of the recent growth is based on the location of the FBI CJIS facility and the DOD BIMl operations. This will only increase with the new FBI Bimetric Center of Excellence to be built on theFBI campus in Harrison County.
27	Apr 26, 2011 8:05 PM	Highway system, existing chemical industry, energy industry, MATRIC, tech park.

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In looking at factors that help attract today's high-paying jobs, on a scale of 1-to-10 -- with 1 being "of little importance" and 10 being "of great importance" -- how would you rate the importance of:												
Answer Options	1	2	3	4	5	6	7	8	9	10	Rating Average	Response Count
Sewer and Water Infrastructure	0	0	1	1	2	1	3	3	5	11	8.26	27
Modern Broadband Internet Infrastructure	0	1	0	0	1	1	2	5	6	11	8.56	27
Road Improvements	0	0	0	1	0	0	7	8	4	7	8.26	27
<i>answered question</i>												27
<i>skipped question</i>												1

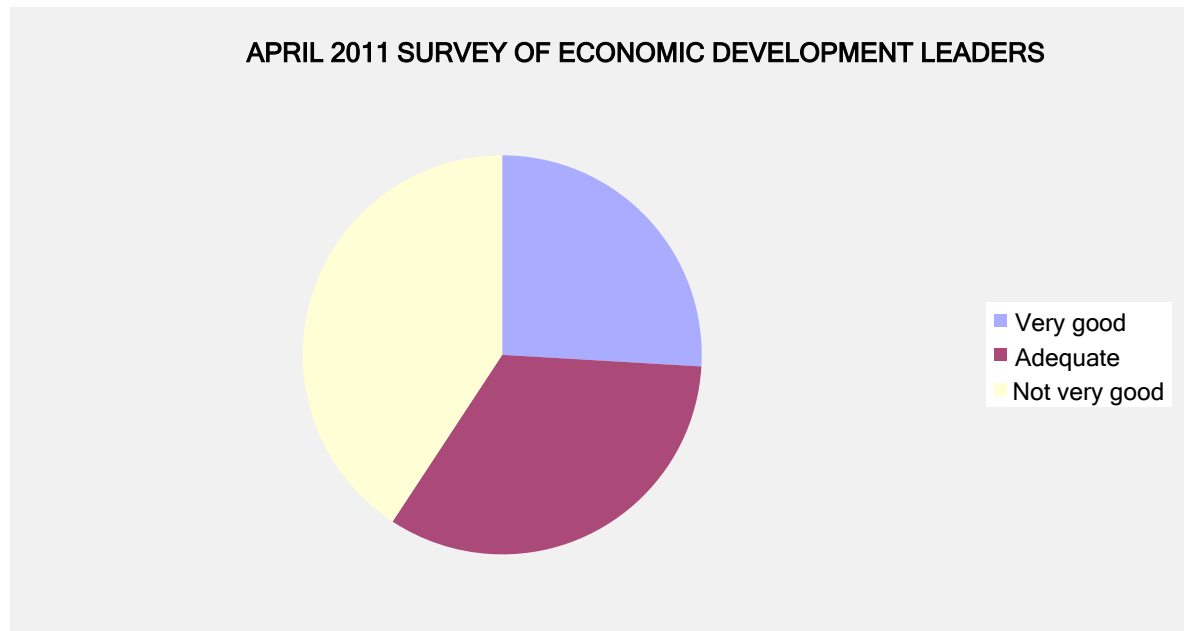
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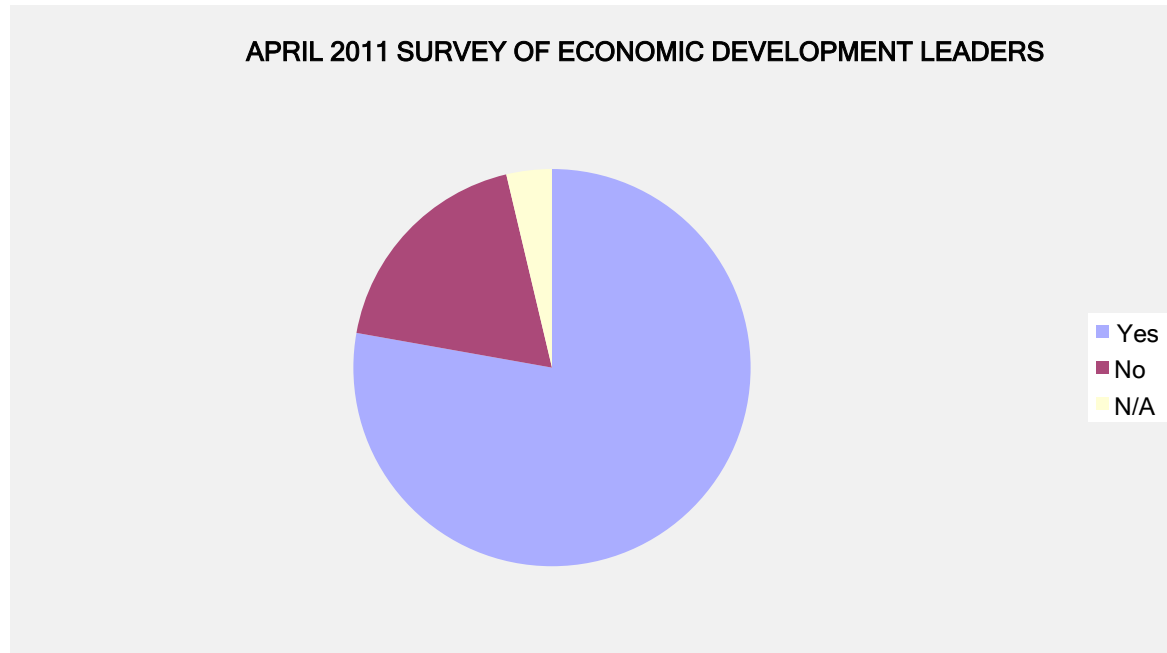
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When it comes to Broadband Internet Service, would you describe the service available to businesses in your region when compared to areas of the country you compete with for jobs as:		
Answer Options	Response Percent	Response Count
Very good	25.9%	7
Adequate	33.3%	9
Not very good	40.7%	11
<i>answered question</i>		27
<i>skipped question</i>		1



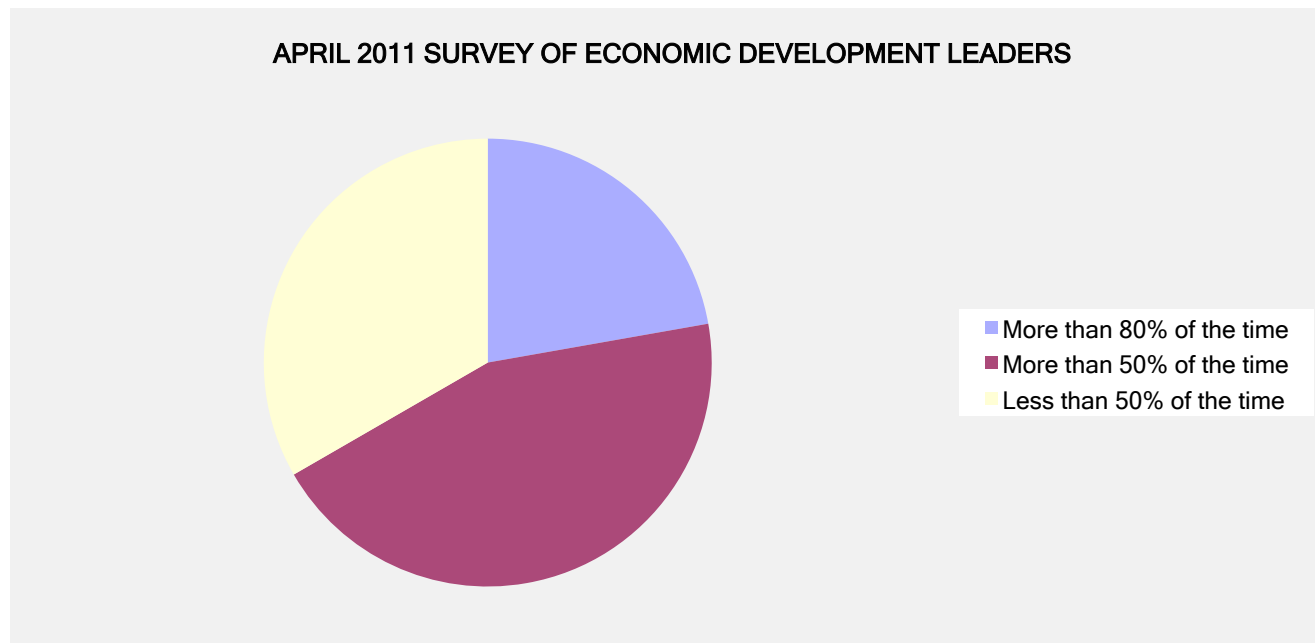
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Is it your experience that businesses considering locating or expanding in your area place high priority on access to affordable, high-speed Internet when evaluating site selections?		
Answer Options	Response Percent	Response Count
Yes	77.8%	21
No	18.5%	5
N/A	3.7%	1
<i>answered question</i>		27
<i>skipped question</i>		1



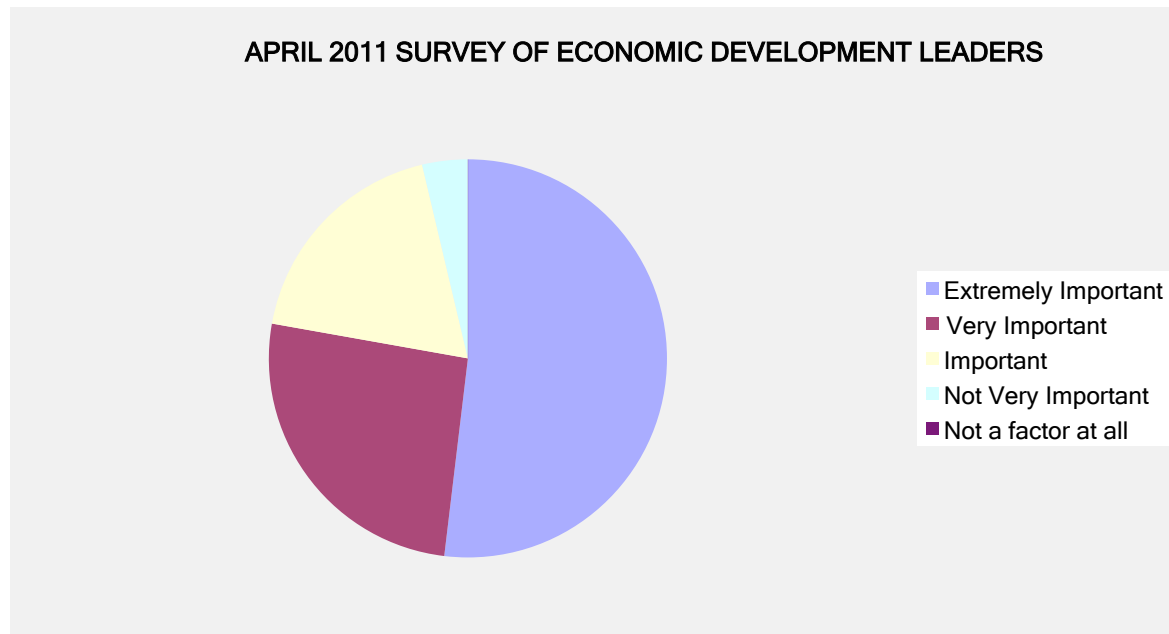
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How often is the availability and/or cost of large capacity Broadband Internet Service for commercial users a factor in discussions you have with businesses interested in locating in your area?		
Answer Options	Response Percent	Response Count
More than 80% of the time	22.2%	6
More than 50% of the time	44.4%	12
Less than 50% of the time	33.3%	9
<i>answered question</i>		27
<i>skipped question</i>		1



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How important do you, personally, believe a modern reasonably-priced Broadband Internet Infrastructure is to attracting jobs in your area when competing against other locations?		
Answer Options	Response Percent	Response Count
Extremely Important	51.9%	14
Very Important	25.9%	7
Important	18.5%	5
Not Very Important	3.7%	1
Not a factor at all	0.0%	0
<i>answered question</i>		27
<i>skipped question</i>		1

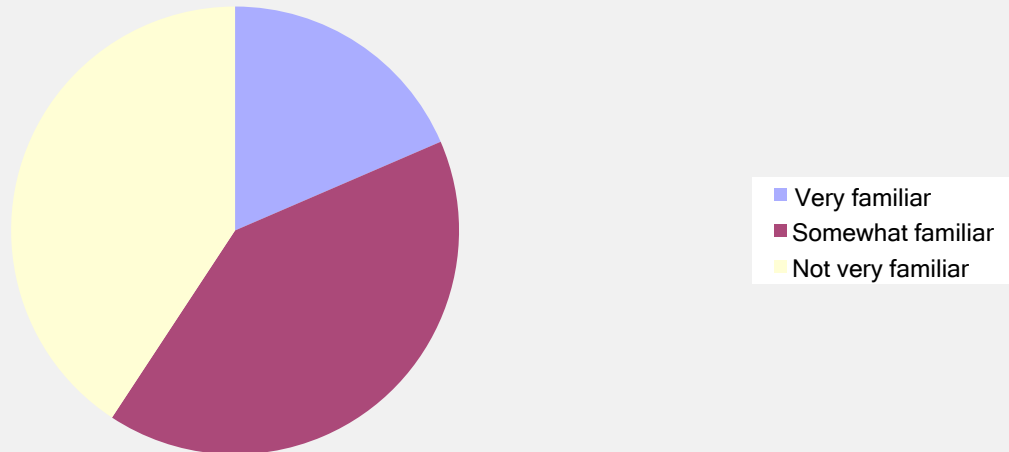


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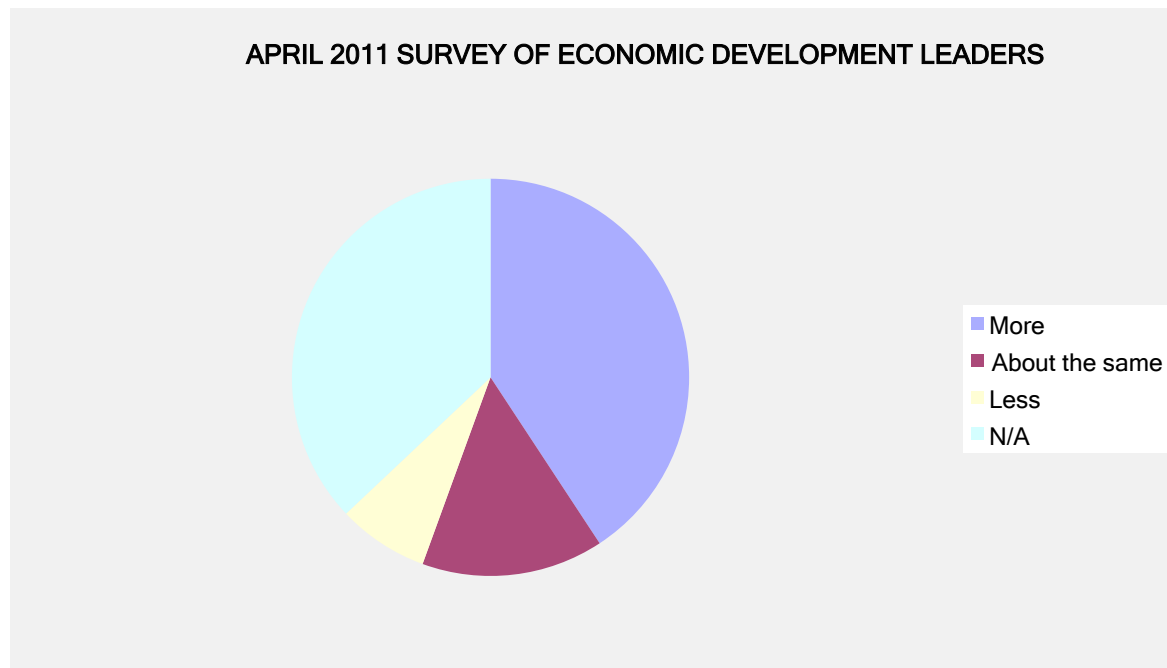
How familiar are you with broadband expansion programs (middle mile infrastructure) being implemented in neighboring states (VA, KY, OH, PA) that emphasize data highways to stimulate access, competition, and affordability?		
Answer Options	Response Percent	Response Count
Very familiar	18.5%	5
Somewhat familiar	40.7%	11
Not very familiar	40.7%	11
<i>answered question</i>		27
<i>skipped question</i>		1

APRIL 2011 SURVEY OF ECONOMIC DEVELOPMENT LEADERS



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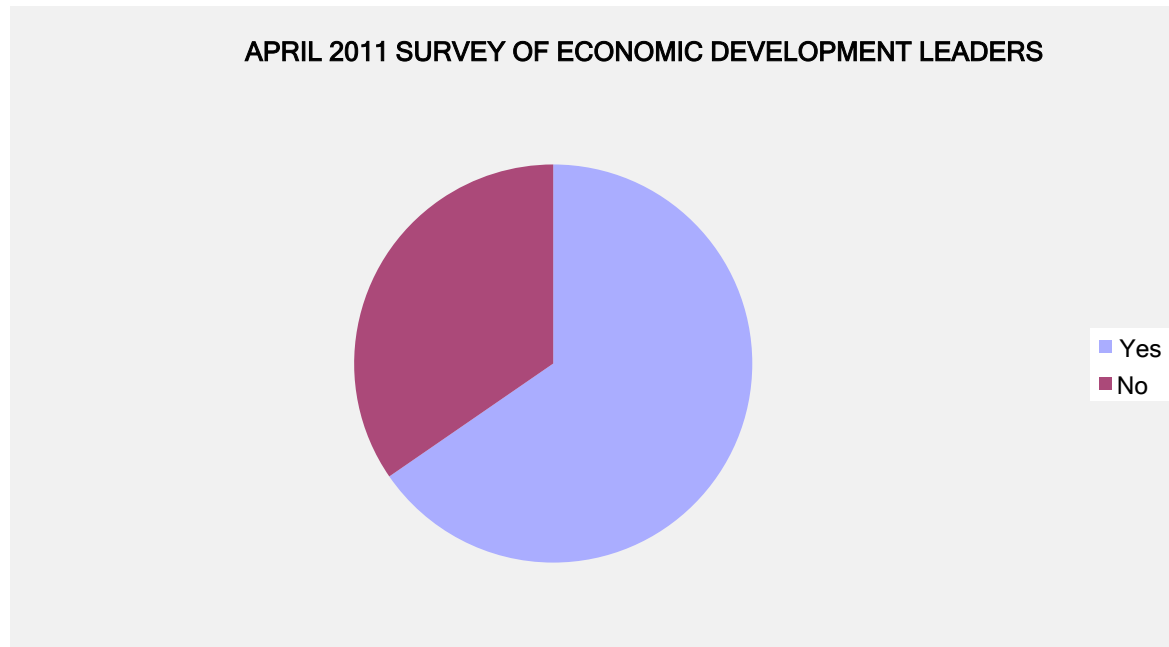
If you are familiar with programs in other states, would you say the cost of large capacity broadband service in West Virginia, when compared to those states, costs:		
Answer Options	Response Percent	Response Count
More	40.7%	11
About the same	14.8%	4
Less	7.4%	2
N/A	37.0%	10
<i>answered question</i>		27
<i>skipped question</i>		1



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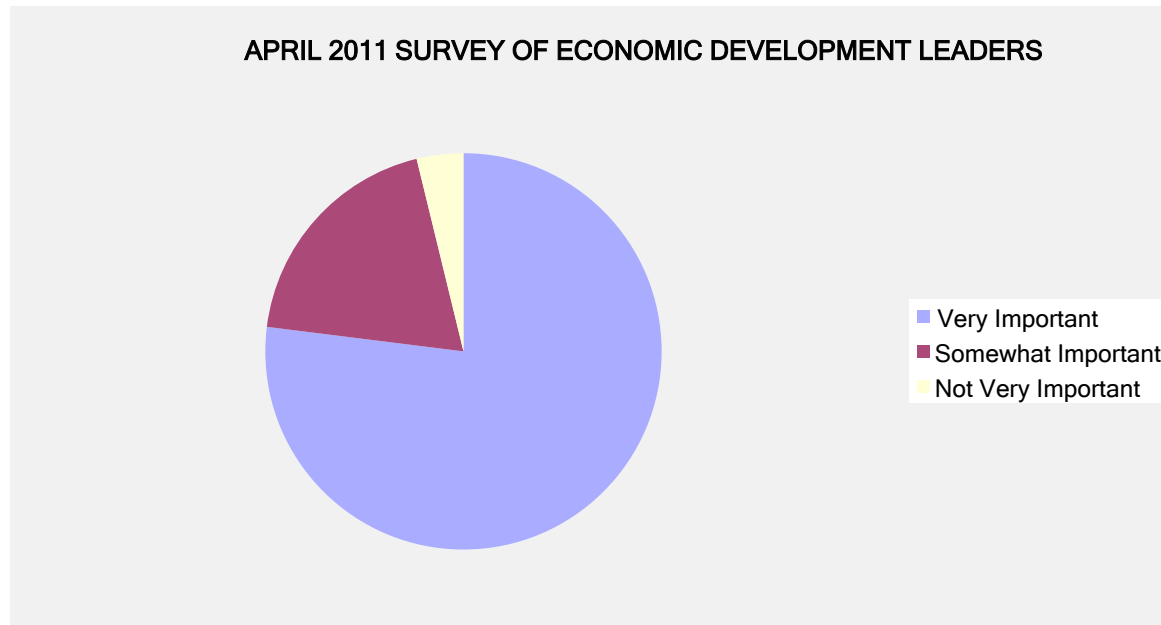
Do you currently have easy access to affordable, large capacity, high-speed Internet broadband services designed to support commercial or industrial development in your region?		
Answer Options	Response Percent	Response Count
Yes	65.4%	17
No	34.6%	9
<i>answered question</i>		26
<i>skipped question</i>		2



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Understanding the growing demand for residential and business broadband services in a growing digital economy, how important is it for West Virginia to adopt aggressive, affordable broadband policies:		
Answer Options	Response Percent	Response Count
Very Important	76.9%	20
Somewhat Important	19.2%	5
Not Very Important	3.8%	1
<i>answered question</i>		26
<i>skipped question</i>		2



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Have you ever lost a business prospect in part due to lack of broadband capacity, speed or cost? If yes, please explain:		
Answer Options	Response Count	
	21	
<i>answered question</i>	21	
<i>skipped question</i>	7	
Number	Response Date	Response Text
1	May 3, 2011 9:39 PM	No
2	May 2, 2011 7:29 PM	No
3	May 2, 2011 6:18 PM	I have a project pending will probably lose it based on costs of broadband
4	May 2, 2011 6:11 PM	Yes, lost a company that looked at an existing building located in an area that doesn't have high-speed access. They ended up locating in another area.
5	May 2, 2011 4:18 PM	No.
6	May 2, 2011 2:30 PM	Not only do too many areas still not have broadband, but too many places where people live do not have it and that affects the quality of life issue when attracting a prospect to live, work, and play in WV.
7	Apr 28, 2011 3:59 AM	Our count may be losing our LPN program because Frontier cannot provide enough bandwidth for distance learning .
8	Apr 27, 2011 9:21 PM	No
9	Apr 27, 2011 8:53 PM	I am not aware of losing a business due to lack of broadband capacity. However, it has become evident, the lack of broadband capacity impedes a company's ability to expand.
10	Apr 27, 2011 8:04 PM	No
11	Apr 27, 2011 6:23 PM	no
12	Apr 27, 2011 2:22 PM	Not that I'm aware of
13	Apr 27, 2011 2:02 PM	No.
14	Apr 27, 2011 12:50 PM	No
15	Apr 27, 2011 12:08 PM	no
16	Apr 27, 2011 12:47 AM	no
17	Apr 26, 2011 9:20 PM	no
18	Apr 26, 2011 8:50 PM	no
19	Apr 26, 2011 8:44 PM	No
20	Apr 26, 2011 8:36 PM	Prospects don't look here because of the lack of high speed, affordable, reliable broadband (defined as 20 to 50 mb and above). Current speeds of up to 3 mb while may be suitable for residential use are not suitable for business. Speeds fluctuate, are not reliable and cannot handle the volume of data that most companies need. Existing companies, the local hospital, the local college, the local board of education, local attorneys and others all need faster Internet than they can currently obtain at a REASONABLE cost.
21	Apr 26, 2011 8:17 PM	Yes, we were looking at a possible location of a data center and the lack of affordable, large capacity broadband was a deciding factor in them not locating in WV.

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Please add any comments you wish regarding the importance of reasonably-priced Internet Broadband Service in economic development:		
Answer Options		Response Count
		11
<i>answered question</i>		11
<i>skipped question</i>		17
Number	Response Date	Response Text
1	May 2, 2011 6:22 PM	The key will be the price. WV has an advantage with costs of power but broadband is a deal killer unless Frontier makes a deal. There is little if no investment in modern infrastructure. There is no sense in being in a power generation state if you cannot benefit from it.
2	May 2, 2011 4:20 PM	BB is important, but we have to recognize it exists only a a piece of the puzzle. Educational opportunities, workforce, roads and infrastructure which is non "electronic" in nature are really just as vital, over the long haul, in my opinion.
3	May 2, 2011 2:30 PM	What are we waiting for?
4	Apr 27, 2011 8:55 PM	The lack of high speed service in the rural areas totally extinguishes the possibility of new small business start-ups.
5	Apr 27, 2011 8:05 PM	Very important infrastructure. However, due to the rural nature of most of the state it may be very difficult to deliver on a statewide basis. Limited resources may have to be targeted to maximize ROI.
6	Apr 27, 2011 6:24 PM	Modern technology and just staying ahead of the curb is always important. Never be satisfied always look to improve.
7	Apr 27, 2011 2:03 PM	Sewer/water & roads needed first.
8	Apr 27, 2011 12:08 PM	you are not in the game without it
9	Apr 26, 2011 8:52 PM	broadband is very important for some businesses and not a factor at all for others. a factor in maybe 30% of inquiries. your questions are leading.
10	Apr 26, 2011 8:39 PM	I personally believe the ARRA grant received by the state of WV has been misallocated and cannot meet the deadline nor the needs of the state's businesses in expanding broadband, let alone providing an economic development tool to those of us that need it. WV needs highways which can't be built overnight. We also need a broadband system that can be built in a matter of months if funds are allocated properly.
11	Apr 26, 2011 8:20 PM	We need the middle mile and trunk line services in WV to remain competitive for may of today's industries. What good is it if we get high speed to everyplace in WV when we can only reach each other and do not hve the facilities to get out of the state and into the major lines.