

Flathead County Broadband Initiative

Survey Results

October 1, 2018

I. Overview

In June, 2018, the Montana West Economic Development (MWED) and Northwest Montana Association of Realtors (NMAR) MLS co-hosted a Community Broadband Initiative Workshop at Flathead Valley Community College. The workshop included presentations, stakeholder panels and roundtable discussions regarding issues related to broadband services in Flathead County. The workshop was convened as a result of input for the Flathead County Comprehensive Economic Development Strategy-2018 that indicated issues with broadband accessibility, cost, and reliability were top issues in the county. As part of the broadband initiative, MWED/NMAR conducted an on-line survey to obtain broader feedback from county residents on these issues.

II. Methodology

The survey was open from July 1 through September 30, 2018. The survey link was posted on the MWED web site. E-mail inviting people to participate in the survey were sent to the MWED e-mail list and participants at the workshop. Local chambers of commerce, local governments and NMAR were also asked to send out a link to the on-line survey through their listserves. Additionally, a press release was distributed to local media outlets.

III. Results

A total of 160 respondents completed the survey. Of those respondents 52.3% were from the Bigfork zip code, 25.3% were from the Kalispell/Evergreen zip code, 8.9% were from the Columbia Falls zip code, and 10.1% were from the Whitefish zip code. The following results were tabulated on a countywide basis as well as for the Kalispell/Evergreen area and Bigfork area. Neither Whitefish or Columbia Falls had enough respondents to derive meaningful conclusions for these localities. Some key findings from the survey include:

- Most respondents are working from home at least part of the time. Only 13.2% of respondents countywide indicated that they never work from home. This underscores the importance of residential broadband services.
- Overall rankings for all performance indicators were ranked as “Poor” by both residential users and business. Even respondents that lived within city limits, which typically has better services, ranked all indicators as poor. Indicators included download speed, upload speed, reliability, redundancy, costs, customer service, and choice of providers.
- County-wide, survey respondents ranked the top five benefits of broadband improvements as:
 - Increased availability of broadband
 - Improve telecommuting and home business opportunities
 - Enhance fire, medical and law enforcement emergency response
 - Enhance ability to attract new business
 - Lower cost of broadband services

Note: Kalispell ranked “Promote entrepreneurship” and “Enhance business markets” in the top five.

- 72.8% of respondents indicated that it was “Very Important” to undertake local efforts to improve broadband services.

Flathead County

1. Total Number of Respondents

	#
Home	158
Business	138

2. Respondents by Zip Code

	#	%
Kalispell/Evergreen (59901, 59903, 59904)	40	25.3%
Bigfork (59911)	81	52.3%
Whitefish (59937)	16	10.1%
Columbia Falls 59912)	14	8.9%
Remainder of County	7	4.4%

3. # of Employees at Business

	%
0-9	74.8%
10-24	11.0%
25-49	4.8%
50-99	4.8%
100+	2.1%

4. Type of Business

	%
Accommodation – Food Service	8.4%
Arts-Entertainment-Recreation	7.0%
Construction	5.7%
Finance/Insurance	4.9%
Health Care	4.2%
Government – Education	2.1%
Manufacturing	4.9%
Professional – Technical	25.2%
Real Estate	12.6%
Social Services	7.0%
Other	18.2%

5. Type of Internet Service

	Home	Business
DSL	49.7%	46.2%
Cable	24.5%	20.0%
Cellular	8.2%	5.0%
Fixed Wireless	6.9%	6.2%
Satellite	5.0%	1.2%
Fiber	1.9%	16.2%
Other	1.9%	3.8%
No Internet	1.9%	1.2%

6. Cost for Internet

	Home	Business
0-\$50	16.3%	14.6%
\$51-\$100	59.2%	39.0%
\$101 - \$150	17.0%	18.3%
\$151 - \$250	4.8%	8.5%
\$251 - \$500	2.7%	8.5%
\$501 - \$1000	0%	6.1%
\$1001 - \$5000	0%	3.7%
\$5000+	0%	1.2%

6. Work from Home

	%
I work part time at home for my employer	7.9%
I work full time at home for my employer	9.2%
I generally work outside the home but I need nights and weekends access for company business	27.0%
I am self employed and work part time from home	19.1%
I am self employed and work full time from home	23.7%
I never work from home	13.2%

7. Download Speed of Primary Internet Service

	Home	Business
< than 4 mbps	11.9%	11.2%
4-10 mbps	28.5%	16.2%
10-25 mbps	16.6%	16.2%
25-100 mbps	17.2%	23.8%
100-999 mbps	3.9%	2.5%
1 Gig or more	0.6%	3.8%
Don't Know	21.2%	26.2%

8. Upload Speed of Primary Internet Service

	Home	Business
< than 4 mbps	36.6%	22.2%
4-10 mbps	23.2%	19.4%
10-25 mbps	7.8%	12.5%
25-100 mbps	3.5%	11.1%
100-999 mbps	2.1%	1.4%
1 Gig or more	0%	1.4%
Don't Know	26.8%	31.9%

9. Overall Performance of Internet Service

1 = Very Poor 2 = Poor 3 = Good 4 = Very Good

	Home	Business	In City Limits
Download Speed	2.35	2.49	2.76
Upload Speed	2.18	2.37	2.41
Reliability	2.40	2.51	2.50
Redundant Connection	2.09	2.15	2.08
Cost	2.28	2.38	2.47
Customer Service	2.39	2.44	2.18
Choice Providers	1.66	1.79	1.89

10. Importance of potential benefits

1 = Very Poor 2 = Poor 3 = Good 4 = Very Good

Increase the availability of broadband	3.79
Expand training and educational opportunities	2.86
Improve telecommuting and home business opportunities	3.60
Enhance fire, medical and law enforcement emergency response	3.56
Improve government on-line services	2.94
Enhance the ability to attract new businesses	3.54
Lower the cost of broadband services	3.50
Promote entrepreneurship	3.44
Enhance business markets	3.47
Increase telemedicine applications	3.08
Address digital divide issues	3.26

11. Importance of undertaking local efforts to improve broadband services

	%
Not Important	2.5%
Somewhat Important	5.7%
Important	17.7%
Very Important	72.8%
Not Sure	1.35

Kalispell/Evergreen

1. Total Number of Respondents

	#
Home	40
Business	33

2. # of Employees at Business

	%
0-9	73.7%
10-24	18.4%
25-49	5.3%
50-99	2.6%
100+	0%

3. Type of Business

	%
Accommodation – Food Service	10.5%
Arts-Entertainment-Recreation	2.6%
Construction	2.6%
Finance/Insurance	5.3%
Health Care	7.9%
Government – Education	0%
Manufacturing	7.9%
Professional – Technical	26.3%
Real Estate	7.9%
Social Services	5.3%
Other	23.7%

4. Type of Internet Service

	Home	Business
DSL	52.5%	48.1%
Cable	27.5%	29.6%
Cellular	5.0%	3.7%
Fixed Wireless	5.0%	0%
Satellite	7.5%	3.7%
Fiber	0%	11.1%
Other	2.5%	3.7%
No Internet	0%	0%

5. Cost for Internet

	Home	Business
0-\$50	10.8%	14.8%
\$51-\$100	70.2%	40.7%
\$101 - \$150	18.9%	18.5%
\$151 - \$250	0%	11.1%
\$251 - \$500	0%	7.4%
\$501 - \$1000	0%	7.4%
\$1001 - \$5000	0%	0%
\$5000+	0%	0%

6. Work from Home

	%
I work part time at home for my employer	2.6%
I work full time at home for my employer	5.1%
I generally work outside the home but I need nights and weekends access for company business	43.6%
I am self employed and work part time from home	23.1%
I am self employed and work full time from home	20.5%
I never work from home	5.1%

7. Download Speed of Primary Internet Service

	Home	Business
< than 4 mbps	10.3%	11.1%
4-10 mbps	25.6%	3.7%
10-25 mbps	20.5%	18.5%
25-100 mbps	20.5%	37.0%
100-999 mbps	2.1%	0%
1 Gig or more	0%	3.7%
Don't Know	17.9%	25.9%

8. Upload Speed of Primary Internet Service

	Home	Business
< than 4 mbps	32.4%	13.0%
4-10 mbps	26.5%	13.0%
10-25 mbps	11.7%	21.7%
25-100 mbps	0%	17.4%
100-999 mbps	5.8%	0%
1 Gig or more	0%	4.4%
Don't Know	25.5%	30.4%

9. Overall Performance of Internet Service

1 = Very Poor 2 = Poor 3 = Good 4 = Very Good

	Home	Business
Download Speed	2.52	2.81
Upload Speed	2.26	2.69
Reliability	2.52	2.86
Redundant Connection	2.18	2.42
Cost	2.33	2.56
Customer Service	2.39	2.73
Choice Providers	1.64	1.89

10. Importance of potential benefits

1 = Very Poor 2 = Poor 3 = Good 4 = Very Good

Increase the availability of broadband	3.85
Expand training and educational opportunities	2.71
Improve telecommuting and home business opportunities	3.64
Enhance fire, medical and law enforcement emergency response	3.49
Improve government on-line services	2.82
Enhance the ability to attract new businesses	3.72
Lower the cost of broadband services	3.38
Promote entrepreneurship	3.62
Enhance business markets	3.63
Increase telemedicine applications	2.97
Address digital divide issues	3.06

11. Importance of undertaking local efforts to improve broadband services

Not Important	0%
Somewhat Important	5%
Important	15%
Very Important	80%
Not Sure	0%

Bigfork

1. Total Number of Respondents

	#
Home	81
Business	66

2. # of Employees at Business

	%
0-9	82.2%
10-24	6.8%
25-49	2.7%
50-99	5.5%
100+	0%

3. Type of Business

	%
Accommodation – Food Service	6.9%
Arts-Entertainment-Recreation	11.1%
Construction	8.3%
Finance/Insurance	1.4%
Health Care	2.8%
Government – Education	0%
Manufacturing	1.4%
Professional – Technical	20.8%
Real Estate	19.4%
Social Services	8.3%
Other	19.4%

4. Type of Internet Service

	Home	Business
DSL	52.5%	2.9%
Cable	18.8%	47.1%
Cellular	11.3%	17.7%
Fixed Wireless	5.0%	5.9%
Satellite	3.8%	5.9%
Fiber	2.5%	0%
Other	2.5%	14.7%
No Internet	3.8%	5.9%

5. Cost for Internet

	Home	Business
0-\$50	17.8%	17.7%
\$51-\$100	52.1%	47.1%
\$101 - \$150	16.4%	14.8%
\$151 - \$250	8.2%	8.8%
\$251 - \$500	5.5%	2.9%
\$501 - \$1000	0%	8.8%
\$1001 - \$5000	0%	2.9%
\$5000+	0%	0%

6. Work from Home

	%
I work part time at home for my employer	9.3%
I work full time at home for my employer	10.7%
I generally work outside the home but I need nights and weekends access for company business	22.7%
I am self employed and work part time from home	20.0%
I am self employed and work full time from home	26.7%
I never work from home	10.7%

7. Download Speed of Primary Internet Service

	Home	Business
< than 4 mbps	12.2%	11.4%
4-10 mbps	29.7%	22.9%
10-25 mbps	14.9%	17.1%
25-100 mbps	14.9%	14.3%
100-999 mbps	4.1%	2.8%
1 Gig or more	0%	0%
Don't Know	24.3%	31.4%

8. Upload Speed of Primary Internet Service

	Home	Business
< than 4 mbps	36.1%	25.0%
4-10 mbps	23.6%	28.1%
10-25 mbps	2.8%	3.1%
25-100 mbps	6.9%	6.3%
100-999 mbps	1.4%	0%
1 Gig or more	0%	0%
Don't Know	29.2%	37.5%

9. Overall Performance of Internet Service

1 = Very Poor 2 = Poor 3 = Good 4 = Very Good

	Home	Business
Download Speed	2.21	2.16
Upload Speed	2.09	2.02
Reliability	2.40	2.21
Redundant Connection	2.09	1.97
Cost	2.19	2.26
Customer Service	2.41	2.29
Choice Providers	1.63	1.65

10. Importance of potential benefits

1 = Very Poor 2 = Poor 3 = Good 4 = Very Good

Increase the availability of broadband	3.82
Expand training and educational opportunities	3.00
Improve telecommuting and home business opportunities	3.62
Enhance fire, medical and law enforcement emergency response	3.61
Improve government on-line services	2.96
Enhance the ability to attract new businesses	3.48
Lower the cost of broadband services	3.61
Promote entrepreneurship	3.36
Enhance business markets	3.38
Increase telemedicine applications	3.12
Address digital divide issues	3.31

11. Importance of undertaking local efforts to improve broadband services

Not Important	2.5%
Somewhat Important	6.3%
Important	20.2%
Very Important	68.4%
Not Sure	2.5%

Comments

Kalispell/Evergreen (59901, 59903, 59904)

It is shocking how poor the internet service is in the County... and honestly not much better in townships. I have now worked for multiple employers who expected and planned to have better service than was available, who have scrambled to make alternate IT plans to compilation and ultimately had to accept that better broadband was/isn't available in the Flathead.

In the county DSL is the only option . Satellite has not been reliable and you'll be great to have more provider options .

DSL at our workplace is too slow and bad customer support (Century Link). Does not allow use of IP phones or offsite cloud work due to speed.

Increase download and upload speeds

Would love to see other options for affordable and reliable providers in the lower valley area. CenturyTel is the choice at this time with low reliability, poor customer service, and very low speeds. I have utilized cable in at work and at a previous home. Cable provided a consistent and affordable service with speeds that allow one to utilize the internet efficiently and allows for multiple users at a time. It would be great if the cable company could have some sort of incentive to extend their services to more rural outlying areas like lower valley. There is significant building and growth in the lower valley area, but I understand it costs a significant amount of money to dig the lines and lay the cable. Other providers have talked about service, and we are always watching and waiting in hopes another option will become available besides CenturyTel.

We are limited at our home location to one provider. They finally dropped a quicker fiber optic line which helped a bunch but it still is not a fast service.

We are paying for "high speed" Internet, but receiving glorified dial-up service.

My husband and I are in real estate here in the Valley and have encountered many problems with clients not getting reasonable internet or having internet discontinued by CenturyLink because they have oversold their broadband. It is a huge problem when we are selling properties because people expect internet in this day. We need to bring the Valley up to date with GOOD internet speeds so people can move to this area for work. Thank you for your attention to this.

Originally had Verizon; the connection & reliability were sketchy at best. Finally had to get satellite service which is a major improvement.

My husband and I both work from home and built a home in the Many Lakes area last summer. We were surprised to learn that CenturyLink's boxes in our area were full and they were not able to offer any internet. Our only other option was satellite internet which turned out to be completely useless. We also have spotty cell service and all internet providers just tell you to use Wi-Fi calling if your service is bad, but that wasn't an option with such poor internet. Three months later, CenturyLink added more lines and we were able to get online with them, but it's still not great. And Wi-Fi calling barely works so it's really challenging running two businesses when our phones barely work. There just doesn't seem to

be enough bandwidth through CenturyLink for the current demand. We spent the three months before we could get CL running back and forth to town to try to find places to get on Wi-Fi just to work. Not a good solution for home based businesses or remote employees.

We had better Internet in Alaska for the last 21 years than we have here. That's sad.

The fact that Century link continues to spend tens of thousands of dollars a year to direct mail market a service that offers "up to 10 Mbps" tells the story...we are still in the stone age when it comes to broadband. If we are going to promote the valleys business and tourism activities, we need more choices and faster speeds. I run the largest fishing charter service in the valley, and once I leave my home, my cellular provider (Verizon) offers better broadband than I have in my home (Charter). My business locations are our boats and while spotty cell service has improved, it is still not good enough to operate many of the operations tech savvy visitors expect. A video phone call just about anywhere in the valley is an exercise in futility, and I use a top of the line phone.

At our location our only option is DSL or skyconnect. DSL is absolutely awful. Skyconnect is great but we're paying about double as a cable connection for the same bandwidth.

It's embarrassing to have slow or down internet issues when dealing with customers/clients from areas where they rarely have those issues.

Of providers, to get and keep a permit to operate: Require performance minimum standards; require minimum expansion of service; require network reliability standards be met; provide matching grants to incentivize providers to install network into currently un/under served neighborhoods.

Of providers, to get and keep a permit to operate: Require performance minimum standards; require minimum expansion of service; require network reliability standards be met; provide matching grants to incentivize providers to install network into currently un/under served neighborhoods.

No access to 100 Mbps or higher speeds makes economic development of Flathead county difficult when other communities can offer 21st century technology. We are in the dark ages here!

Whitefish (59937)

Internet reliability in our area is terrible! It is out at our home often, which is very frustrating and annoying. We pay \$60/month for just internet. It also seems to be out at work way more than what would be considered normal. In this day and age, it is extremely difficult to get anything done when the internet is out. It is frustrating to be at work and not be able to complete necessary tasks.

Flathead valley residential customers need more choice when it comes to broadband. The market and availability seems slim when it comes to alternatives between the two big players (Charter/Spectrum and CenturyLink). And even then, only Charter seems to be progressing in their bandwidth capabilities for residential customers. We need to incentivize diversity in the residential market for innovation and growth. Commercially, there are more choices. Yet, redundancy seems to be a real issue. The commercial carries seem plagued with single points of failure out of the Flathead Valley. Though they claim redundancy, the reality is quite apparent that they do not have either redundant paths out of the valley, or the appropriate fail-over hardware to deal with networking issues. With our commercial carriers we seem to have around a 99.8% yearly up-time. That means we have roughly 15 hrs of

downtime per year. That's not acceptable for critical government services and business. The commercial carriers need incentivized to have better up-time.

More options, less cost, more availability, net neutrality.

This should be a free market decision based on demand by consumers.

Bigfork (59911)

I depend on my internet to be able to work, it is a pain when (like this morning) I have to spend my time on figuring out why my internet is not working.

Because of rural area, reliable wireless sharing of internet connection between buildings would be useful.

I have given bad ratings because I have had enormous problems that are reported & NEVER rectified by CenturyTel, Dish, Direct Tv, Verizon, etc. So yes question #12 much improvement needed across board.

I work full time for Cisco Systems as a Sr. Services Product Manager. I have global responsibilities which consists of 6 plus hours (on average) of WebEx (video) sessions every single day. My current broadband speeds are at the very minimum possible to receive and transmit video. There have been numerous occasions where the video portion of the conference call is not available due to insufficient bandwidth. I cannot support Cisco's Virtual Office (CVO) system due to insufficient bandwidth which is a considerable hindrance. If I had higher speeds, the CVO system would enable my home office to look and feel like I was in our corporate office in San Jose, CA. I cannot get a digital connection without paying \$10k plus to run a line approximately 50 yards which is ridiculous. Therefore, I am solely reliant on a sub-par DSL connection that has not increased in speeds in many, many years. As more folks such as myself who want/need to telecommute for their livelihood, it is imperative that we do everything possible to improve broadband speeds throughout the valley.

Thank you for sending this out and caring enough to try to make a difference my neighbors have a different provider and down ALOT - it is great to even consider they may have choices more cost effectively

Service is poor and intermittent - guest dislike the free Wi-Fi - and internet overall - it is the weakest link in our service. Our business suffers from poor connectivity, and everything that goes along with 3rd world internet service in a modern age.

Clients who purchase homes here are unable to get internet

High speed internet is vital for me to live and work in Bigfork. Internet service during the summer months goes from bad to terrible with the influx of tourists sharing the limited band width. Without high-speed internet service, Bigfork will be by-passed by more tech savvy communities in attracting businesses and expanding the tax base.

I am not able to spend as much time in my 2nd home/office in Bigfork as I would with RELIABLE, HIGHER SPEED internet access - upon which my business/profession is 100% dependent. Cost is not as important to me as reliability and speed. (Summer/tourist months have excruciating slow internet which hurts my business operations)

As a real estate agent in the Valley that works with many, many clients relocating to our area, Internet/Broadband capacity is incredibly important and we as agents lose quite a few sales due to lack of adequate capacity, we have the most beautiful properties in the world, but buyers turn them down due to the most basic internet and broadband capacity not being available. Losing sales means losing great people moving to our Valley, enjoying what we have to offer, and keeping our economy stable.

We have Charter here at our motel and it is terrible and unreliable.

We have none, I homeschool, it is awful ??

CenturyLink is in my area, but at bandwidth capacity and only at very slow speeds. As a telecommuter Hughesnet was my only option and the data limits severely limit my capabilities. It was like going back in time 20 years when we moved here and it's been a huge challenge.

Thank you for bringing this to attention. Our community is way too far behind the times. Improvements are welcome and would be great for our area!

Flathead county, especially the Bigfork area is behind the times with internet access. The town has made little to no investment in working with providers to increase the broadband capabilities in the overall town of Bigfork where both Kalispell and Whitefish have. Services need to be improved to attract younger individuals looking to settle especially as Baby Boomers decrease in their demographics. Real estate prices are high in the Bigfork area for what many see as no broadband services. Only option for most people right now is DSL which effectively worthless. Fiber capabilities need to be improved in the area and I would expect that taxpayers would be willing to approve a bond offering to get those services in place. Businesses will slowly die due to the inability for commerce outside the direct area due to non-existent broadband services. Inside the city limits of Bigfork is better but outside of the direct city limits need vast improvement.

It's very difficult to try and run a business from when you can't rely on the internet to promote your business.

This has been an issue for years with problems during hi use summer months the worst. For the cost and future need for new and better infrastructure the utility provider should step up and pay for upgrades. I feel the utility is making this into a crisis to get the local community to flip the bill. It's shameful but people seem to be falling for this stunt.

The faster and more reliable, the better. This is the way of the world. A business couldn't be without phone service in the 20th century. Our economy and way of life is now attached to the internet.

I don't feel it is the counties responsibility to address the internet issue other than allowing and permitting companies that provide that service the ability to do so.

It's like we're in the stone ages here.

As a real estate professional I have seen a lot of potential buyers that would move their businesses and families here decide to go elsewhere due to lack of quality internet services.

Columbia Falls (59912)

Our service is awful and it needs to be better. I am always told by the provider that the problem is my equipment but amazingly, my equipment works just great until it's Friday or Saturday evening. Then, it almost never works. We need more reliability in our internet service to this valley, period.

This is way overdue! Please get this done as soon as it can possibly be done! Have only one choice of providers is a travesty.

If the valley is to grow it is critical to get faster more reliable internet. If your outside the city as I am DSL is 3 MPS. I have a 9 room B&B and if more than 2 guests get online it crashes. Same situation for 15 years and the county commission refuses to do anything about it. Cable is 100 yards away but wants \$23,000 to bring it to me if they ever got time. Ridiculous.

The only available internet for us is CenturyLink and we reset the modem multiple times a day

I am on second provider both not satisfied

We moved here just over a year ago and because of the lack of internet service in our area, we have put our house up for sale to leave the area because of our inability to work remotely - from home.

Remainder of County

We live in Somers, a mile and half up a dirt road. CenturyLink buried fiber optic cable up our road in the summer of 2017 and installed a box for the fiber optic connections that sits on our property. CenturyLink told us that fiber optic internet would be available in September 2017. Fast forward to September 2018, and now CenturyLink tells us that there are no connections available (even though the box sits on our property) and we are on a waiting list. Our current download speed through CenturyLink's "DSL" is 4mbps even though it's listed as 6mpbs on our bill. We found out our neighbor, literally 1/4 mile up the road, gets 45mpbs through CenturyLink (fiber optic). We ended up putting our CenturyLink account on hold and installing satellite internet through MontanaSky, so we now get 20mpbs for the same cost as CenturyLink. Thankful to have an option other than CenturyLink!

We have various providers that consolidate in metro area but not rural due to cost additional metro provides will not make a difference