

Cheyenne County Technology Committee's Assessment of Telecommunications Needs

Study Highlights

Community Survey

The following summary is based on 277 responses received from community residents of Cheyenne County. Generally, the proportions reported are based on those answering the question unless otherwise noted. In some instances (such as questions about Internet use), the proportion not responding was approximately one-third of the respondents.

Residents in Cheyenne County are regular users of telecommunications.

- They have an average of 1.3 phone lines in their home. Twenty-one percent had more than one phone line.
- Almost one-half (48%) report having an Internet service provider.
- Many of those that do not have an Internet service provider reported using public Internet access resources. Forty-five percent had used the Internet at a public library, 31% had used Western Nebraska Community College's resources, 7% had used the Internet resources available through the UNL Cooperative Extension office and 12% had used it at the Educational Service Unit #14's office.
- Of those using the Internet, 70% use it for e-mail, 69% for web searches, 44% for purchasing goods and services, 37% for entertainment and 10% for marketing products or services.
- At least one-third of Internet users reported using the Internet for the following activities at least monthly: e-mail (75%), doing research (73%), for adult learning (52%), buying services or products (49%), obtaining health care information (47%), accessing information about their community (41%), accessing government services (39%), and for children learning (39%).

Residents report having additional needs for telecommunications in the future.

- Twenty-four percent feel they will need more phone lines in the next three years. Of those, 13% anticipate needing at least two additional phone lines.
- When asked about the availability of and their desire for various telephone features, telemarketer block was the feature most desired. Currently, seven percent have this feature,

62% said they don't have it, and 31% stated they want this feature. Over one-half (54%) reported having caller ID and 37% have call waiting.

- Twenty-nine percent desire Internet services that are not available. Some of the desired services include: wireless access, cable modem, DSL (digital subscriber line), and ISDN (integrated services digital network).
- When asked if they would like a dedicated line, 25% stated they would (59% did not answer this question). Forty-eight percent would like a faster connection (45% chose not to answer this question).

Residents are generally satisfied with their telecommunications services.

- Sixty-nine percent rated the availability of new services from their local telephone provider as either "excellent" or "good."
- When asked to rate how well providers of telephone services meet their needs, 70% gave them an excellent or good rating.
- Sixty-two percent felt their Internet service provider was doing an excellent or good job at meeting their needs.

Residents are generally aware of the importance of telecommunications.

- Almost two-thirds (65%) felt they were "very aware" or "somewhat aware" of the benefits of Internet access.
- Thirty-eight percent rated the importance of Internet access to them as either "critical" or "very important."
- Many residents felt the importance of using the Internet for the following activities was either critical or very important: e-mail (70%), research (60%), children learning (48%), and adult learning (42%).

Many residents are interested in training delivered via the Internet.

- When asked about their interest in accessing training over the Internet for the following applications, many felt it was either critical or very important: research (57%), e-mail (55%), children learning (48%), adult learning (44%), and providing emergency communications (29%).

Some support for regional telecommunications initiatives was detected.

- When asked if they would support joining a regional effort to buy telecommunications services not currently available, 20% would support it. Twenty-two percent stated they would not support joining such an effort and 58% answered “maybe.”
- The main reason given for joining a regional effort were split between saving money (47%) and getting better services (51%).
- Sixteen percent expect the minimum level of savings on telecommunications from joining a regional effort to be less than 10%. Twenty-eight percent felt the savings would be 10-15%, thirty percent feel the savings would range from 15 to 20%, and twenty-six percent feel they would be more than 20%.
- Thirty percent stated they would purchase telephone services through a cooperative effort and 60% responded “it depends.” Forty percent would purchase Internet services through such an effort while 51% felt “it depends.”

Residents are generally aware of current training efforts.

- Seventy-three percent said K-12 schools provide computer training, 53% said the public library provided such training, 85% knew Western Nebraska Community College provided computer training and 29% said UNL Extension offered such training.
- Fifty-one percent said K-12 schools provided Internet training, 47% said the public library provided such training, 69% reported that Western Nebraska Community College offered Internet training and 26% said UNL Extension did Internet training.
- Only 26% reported being aware of the Cheyenne County Technology Committee.

Business Survey

This summary is based on 125 responses received from businesses in Cheyenne County. Two larger businesses were excluded from this analysis since their results were not considered typical of the businesses in Cheyenne County. Generally, the proportions reported are based on those answering the question unless otherwise noted. In some instances (such as questions about Internet use), the proportion not responding was approximately one-third of the respondents.

Business Profile

- The businesses had an average of 18 full-time employees.
- Thirty-one percent were service businesses and 27% were involved in wholesale/retail trade.
- Ninety-eight percent of the businesses said they serve a local customer base, 81% serve a regional base, 38% have a national customer base and 15% serve an international base.
- Sixty-four percent of the businesses plan to expand in the next 3 - 5 years.

Business' Current Use of Telecommunications

- The businesses have an average of 3.78 voice telephone lines, 1.44 fax lines, 1.31 data lines and 1.04 T-1 lines (although 61% report having no T-1 lines).
- Forty-four percent have an 800 or toll free phone number. Of those having one, they had an average of 1.56 numbers.
- The majority of businesses (80%) said most of their incoming telephone calls were local calls. Twelve percent reported receiving mostly non-local calls and eight percent stated most of their calls were from an 800 number.
- The businesses spend an average of \$368.57 on local telephone service and \$267.18 on long-distance service per month.
- Eighty-four percent of the businesses routinely use a fax machine. The average number of fax machines was 1.28. They report sending and receiving an average of 74.22 faxes on a weekly basis.
- Almost two-thirds (66%) currently use wireless service. Of those, they have an average of 5.41 wireless phones, pagers or other devices. They reported spending an average of \$182.14 per month on wireless service.
- When asked how frequently they use various telephone features, many businesses reported using the following features "often": voice mail (33%), caller ID (23%), and conference calling (16%).

- Eight percent of the businesses currently use video conferencing. Of those, they reported using video conferencing an average of 6.33 times per month. Twenty-nine percent of those businesses own their system. The majority (57%) report most of their sessions are internal and 29% report most are with customers or suppliers. Fifty-eight percent currently or will conduct multi-point conference sessions.
- The average number of computers used by the businesses is 14.66. Fifty-nine percent said their computers are connected to a Local Area Network (LAN) or a Wide Area Network (WAN).
- Seventy-two percent currently use Internet service in their business.
- The following proportions report doing the following Internet activities on at least a weekly basis: e-mail (68%), research (50%), provide information to customers (44%), marketing (37%), sell products or services (31%), buy products or services (28%), software updates (28%), employee training (16%) and employee education/online courses (16%).
- Forty-two percent report having a web page. The primary purpose was for information (56%). Twenty-four percent reported the primary purpose was for marketing and 15% felt it was for sales.

Business' Future Use of Telecommunications

- Over one-half (51%) expect they will need more telephone lines in the next 3 years. Of those, 40% expect they will need at least two additional phone lines, 12% need at least two additional fax lines, 16% think they will need at least two additional data lines and 21% expect to add at least two more T-1 lines.
- Many businesses believe they will increase their use of the following features by 30% or more over the next three years: voice mail (37%), conference calling (24%), caller ID (22%), call forwarding (17%), telemarketing block (17%), call waiting (11%) and busy call forwarding (11%).
- Seventeen percent of the businesses don't currently use video conferencing, but plan to in the future. Of those, 8% believe they will add this system in the next 12 months, 20% think it will be in the next one to two years, 8% think it will be in the next two to three years and 8+% feel it will be more than three years from now.
- The proportion of businesses believing they will do the following Internet activities at least weekly in the future are as follows: e-mail (80%), research (68%), provide information to customers (67%), sell products or services (57%), marketing (55%), buy products or services (56%), software updates (43%), employee education/online courses (36%) and employee training (35%). For all of these activities, the businesses expect to use them more frequently than they do currently.

Business' Views of Telecommunications

- The businesses were split when asked the most important factor to them when selecting a long distance telephone service provider. Fifty-four percent said the most important factor was cost, while 43% said it was quality of service.
- Over one-half (52%) feel that Internet access is either “critical” or “very important” to their business.
- When asked about the importance of using the Internet for the following activities to their business, many felt they were either “critical” or “very important”: e-mail (60%), provide information to customers (56%), research (50%), software updates (49%), marketing (40%), buy products or services (39%), sell products or services (38%), employee education/online courses (26%) and employee training (23%).
- Sixty percent of the businesses said the most important factor in selecting an Internet service provider is quality of service. Twenty-four percent felt the most important factor was cost and 13% felt it was speed.
- Over two-thirds (69%) reported being satisfied with their Internet service offerings.

Business' Views of Telecommunications Initiatives

- Eighteen percent of the businesses said they would consider joining a local effort to buy telecommunications services not currently available. Fifty-six percent said “maybe” and 27% were not interested in joining such an effort.
- Over one-half (53%) said the main reason for joining a cooperative effort would be saving money. Forty-six percent said the main reason would be getting better service.
- Fifteen percent believe the minimum level of savings they would expect from joining a local effort would be less than 10%. Thirty-five percent believe the savings would range from 10 to 15%. Twenty-eight percent feel the savings would be 15 to 20% and 22% believe the savings would be more than 20%.
- Thirty-four percent of the businesses would purchase telephone services through a cooperative effort and 61% said “it depends.” Forty-two percent would purchase Internet services through such an effort, while 54% said “it depends.”
- Almost one-half (49%) were aware of the Cheyenne County Technology Committee.