

EXHIBIT I.3.a

Business and Institutional Survey Summary

Kalamazoo County

Kalamazoo County
Business Survey Summary
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Kalamazoo County

Foreword

Business Survey Summary Commercial, Institutional, Educational, and Medical Users

This document contains the survey results of the use of and need for connectivity services in Kalamazoo County.

The results of the surveys indicate a gap in connectivity services. The initial gap, however, is not just an availability issue, but a value proposition. In other words, the demand for connectivity services is price sensitive. The majority of businesses have a high-speed Internet option available; however, 45% still choose a low-speed dial-up service. The survey results support the need to increase the awareness of the benefits of advanced connectivity services.

In addition to gaining better understanding of connectivity services, the survey asked a series of questions regarding the performance of electric, Internet, telephone, cable television, and cellular telephone providers. The survey results will allow Kalamazoo County stakeholders to:

- Compare utility providers' performance on specific attributes (reliability, rates, customer service, and community service), to identify strategies to encourage improvements.
- Objectively define the strengths and weaknesses of service providers in Kalamazoo County.
- Provide baseline information that can be used by the providers to improve performance.
- Understand the customers' perceived value of services received.

The key aspect of the above process is that it is driven from a representative sample of all customers, not just a select few.

Kalamazoo County

Business Survey Summary

Section 1:

Business Survey Results Summary

Kalamazoo County

Business Survey

Survey Results Summary

Internet and Computer Use

The survey asked a series of questions regarding the use of Internet and computers. The surveys indicated that:

- 44% of Kalamazoo County businesses indicate that there are other offices or locations within Kalamazoo County with which they exchange data. Of these, 64% indicated they exchange data with three or more locations; 16% exchange data with one other location. The locations within Kalamazoo County with which businesses most often exchange data follow:
 - 88% Kalamazoo
 - 69% Portage
 - 35% Parchment
 - 33% Vicksburg
 - 30% Galesburg
 - 30% Schoolcraft

- 66% of businesses frequently exchange data with offices or locations outside of Kalamazoo County. Of these, 75% exchange data with three or more locations within Michigan; 9% exchange data with one other location in Michigan. The city or region of these locations follow:
 - 48% Area 1 (Berrien, Van Buren, Cass)
 - 68% Area 2 (Allegan, Kalamazoo, St. Joseph)
 - 50% Area 3 (Calhoun, Branch, Hillsdale, Jackson, Lenawee)
 - 61% Area 4 (Kent, Ottawa, Muskegon, Ionia, Barry)
 - 44% Area 5 (Genesee, Shiawassee, Macomb, Oakland, Livingston, Washtenaw, Wayne, Monroe)
 - 15% Area 6 (Huron, Tuscola, Lapeer, Sanilac, St. Clair)
 - 33% Area 7 (Clare, Osceola, Mecosta, Montcalm, Isabella, Gratiot, Clinton, Ingham, Eaton)
 - 19% Area 8 (Bay, Gladwin, Midland, Arenac, Saginaw)
 - 27% Area 9 (Grand Traverse, Leelanau, Manistee, Benzie, Mason, Oceana, Wexford, Lake, Newaygo)
 - 15% Area 10 (Charlevoix, Emmet, Cheboygan, Presque Isle, Montmorency, Otsego, Antrim, Kalkaska, Crawford, Oscoda, Alpena, Alcona, Ogemaw, Roscommon)
 - 14% Area 11 (Upper Peninsula of Michigan)
 - 39% Area 12 (Gary/Chicago Area)
 - 37% Area 13 (N. Indiana and N. Ohio Area)

Internet and Computer Use (continued)

- Of Kalamazoo County businesses that exchange data with other regions within the U.S., the percentage of businesses that exchange data with the following regions follows:
 - 33% Central
 - 82% Midwest
 - 48% Northeast
 - 26% Northwest
 - 33% South
 - 45% Southeast
 - 45% Southwest

- Of Kalamazoo County businesses that exchange data with international locations, the percentage of Kalamazoo County businesses that exchange data with the following regions follows:
 - 15% Africa
 - 25% Asia
 - 24% Australia
 - 66% Canada
 - 16% Central America
 - 50% Europe
 - 33% Mexico
 - 13% Middle East
 - 21% South America

- 40% of businesses have five or more computers at the location. 60% have four or fewer computers.

- 65% of computers at Kalamazoo County businesses are connected with a Local Area Network (LAN).

- 91% of respondents reported to have an active Internet connection at the place of business. Of the businesses with an Internet connection, 86% said that the majority of their computers had Internet access. Businesses reported the following connection types:
 - 15% use a cable modem
 - 24% use DSL
 - 5% use fractional T1
 - 1% use fractional T3
 - 5% use Full T1
 - 5% use ISDN
 - 1% use frame relay
 - 28% use a dedicated telephone line
 - 17% share a telephone line

- 24% of those that do not have an Internet connection said they plan to obtain a connection in the next year. An additional 24% said they may get a connection in the next year.

- 56% of Kalamazoo County business Internet subscribers pay less than \$50 per month for service, 21% pay \$100 or more per month.

Internet and Computer Use (continued)

- 62% of Kalamazoo County businesses have one Internet access line; 9% have five or more lines.
- Kalamazoo County businesses recorded the following levels of satisfaction with various aspects of Internet access:
 - Speed of connection: 63% satisfied
 - Price of services: 77% satisfied
 - Reliability: 81% satisfied
 - Choice of providers: 64% satisfied
- 62% of businesses indicated they have a company web site. Of these, 46% are hosted in Kalamazoo County.
- Of businesses without a web site, 40% indicate they plan to have a web site in the next two years. An additional 18% said they may have a web site in the next two years.
- 71% of businesses indicate they have an e-mail server. Of these, 52% of the e-mail servers are located in Kalamazoo County.

Kalamazoo County businesses were asked how willing they would be to switch Internet providers for an Internet service that offers increased connection speed and allows users to be online all the time. Figure 1 shows the results of this analysis.

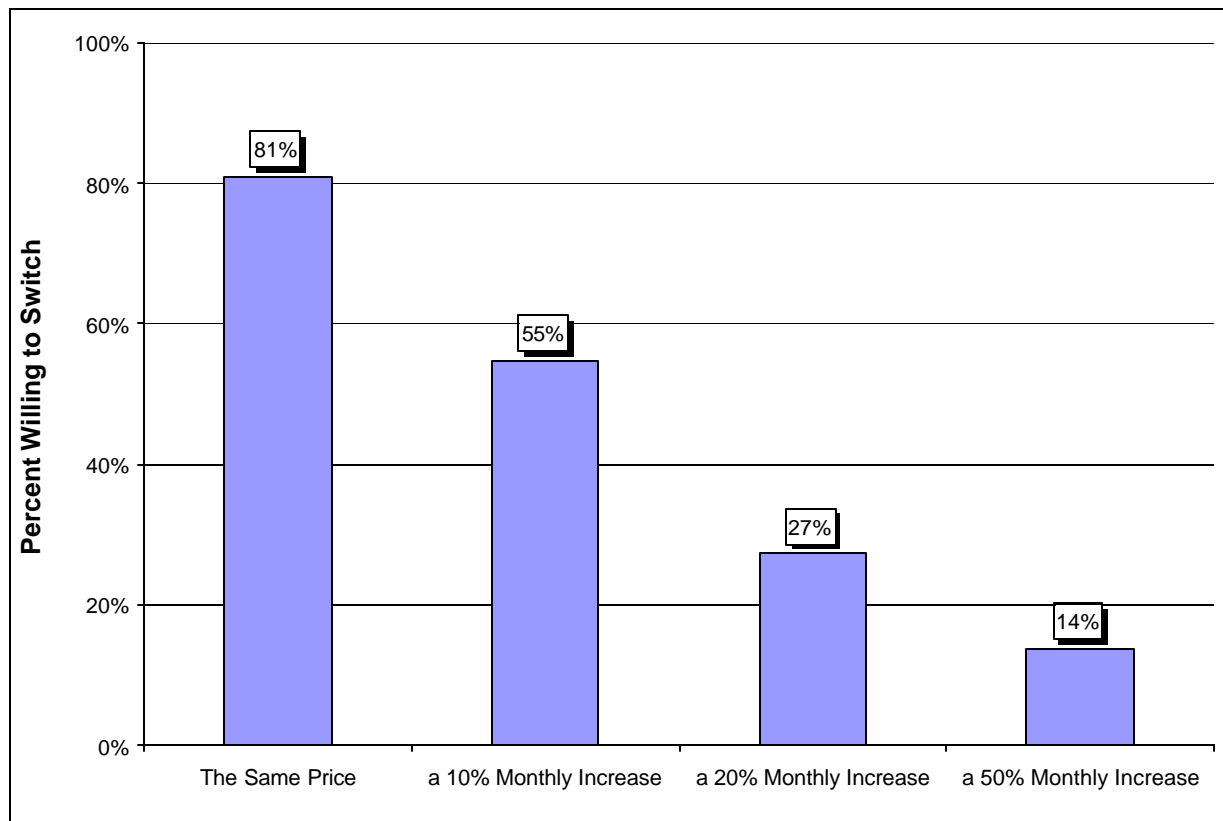


Figure 1: Propensity to Switch Internet Providers for Better Service

Internet and Computer Use (continued)

Figure 1 shows there is a strong negative reaction to small price increases for Kalamazoo County businesses. Strong marketing and awareness campaigns are often required in capturing customers for high-end products and services.

Similarly, Figures 2 and 3 show that business customers have a negative reaction to purchasing a faster internet connection at a significantly higher price than what they are paying currently.

Figures 2 and 3 contain some terms used to describe Internet services. These terms are:

- **Upstream:** Data transfer from your location to the Internet.
- **Downstream:** Data transfer from the Internet to your location.
- **1,544 Kbps:** 1,544,000 bits per second (Example: would take approximately 1.5 minutes to transfer an average drawing (CAD) file of 15,000 K bytes)
- **256 Kbps:** 256,000 bits per second (Example: would take approximately 9.5 minutes to transfer an average drawing (CAD) file of 15,000 K bytes)

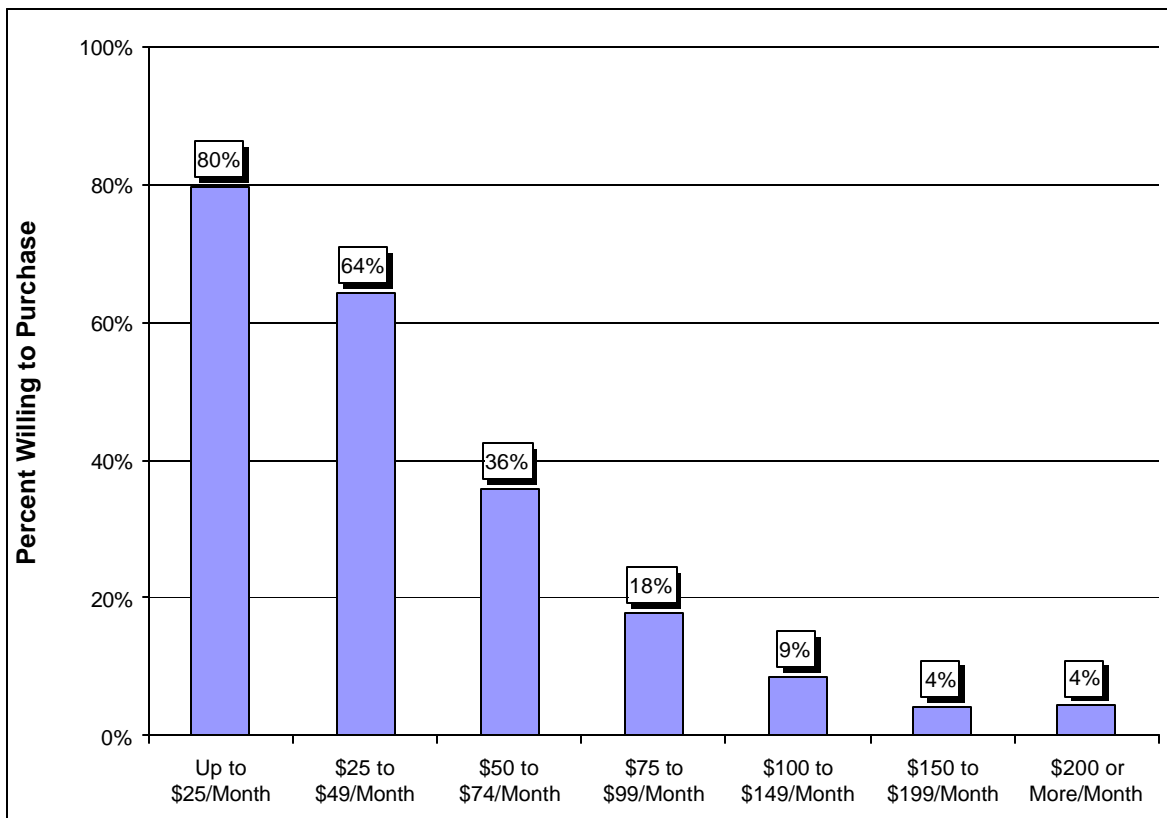


Figure 2: Propensity to Switch Internet Providers at 1,544 Upstream/ 256 Downstream Data Rates

Internet and Computer Use (continued)

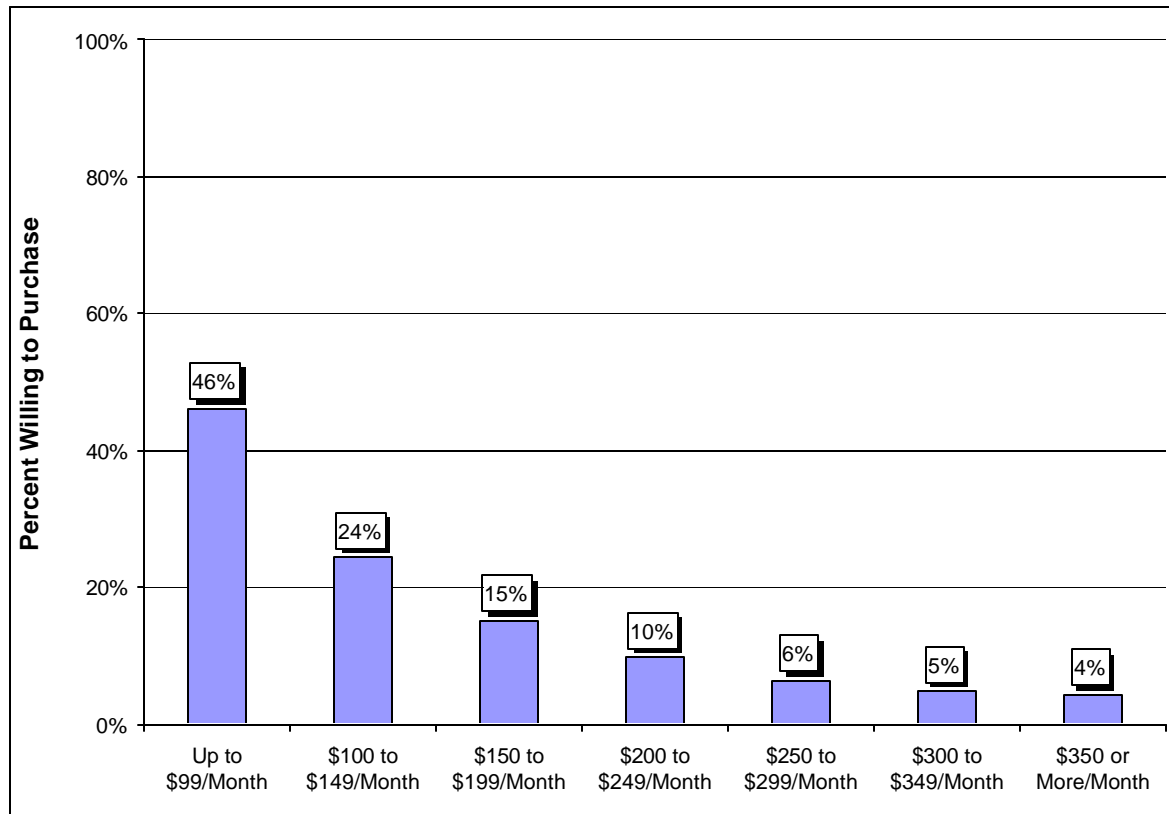


Figure 3: Propensity to Switch Internet Providers at 1,544 Upstream/ 1,544 Downstream Data Rates

- Kalamazoo County businesses recorded the following levels of likelihood with various uses of Internet access in the next two years:
 - Access to information: 92% likely or already use
 - Create/maintain a website: 78% likely or already use
 - Develop new products exclusively on Internet: 22% likely or already use
 - Engage in business-to-business commerce: 81% likely or already use
 - Engage in e-commerce with customers: 47% likely or already use
 - Inventory management: 28% likely or already use
 - Market new products exclusively on Internet: 50% likely or already use
 - Provide technical support to customers: 51% likely or already use
 - Recruit employees: 43% likely or already use
 - Develop ability for employees to work at home: 38% likely or already use

Internet and Computer Use (continued)

- Kalamazoo County businesses were asked to estimate their future Internet access speed requirements. Their responses follow:
 - One year from now: 50% same as now; 29% five times or faster; 17% don't know
 - Two years from now: 30% same as now; 40% five times or faster; 27% don't know
 - Three years and beyond: 23% same as now; 38% five times or faster; 35% don't know
- 47% of Kalamazoo County business said that they would not allow telecommuting even if high-speed connections were available to employees from home; 29% said they would allow or already allow telecommuting.
- Kalamazoo County businesses also expressed interest in the following services:
 - Combined billing for Internet, telephone and utility services: 55% interested or somewhat interested; 2% already use
 - Distance learning: 32% interested or somewhat interested; 3% already use
 - Interactive education: 37% interested or somewhat interested; 3% already use
 - Premises Management/Security: 28% interested or somewhat interested; 5% already use
 - Video conferencing with other offices within company: 28% interested or somewhat interested; 3% already use
 - Video conferencing with customers/suppliers: 27% interested or somewhat interested; 3% already use

Telephone Service

- 51% of Kalamazoo County businesses reported having 2-4 separate telephone lines at their location. 8% reported one line; 41% have 5 or more lines.
- 79% of Kalamazoo County businesses have not considered VoIP (Voice over Internet Protocol). 9% considered VoIP but are not using it.
- 57% of businesses use the DSO (standard business line) type of telephone line. 19% use T1/T3 lines. 24% don't know what type of telephone line they use.
- Kalamazoo businesses reported the following monthly telephone bill amounts:
 - 29% pay \$99 or less
 - 49% pay more than \$200

Kalamazoo County businesses were asked how willing they would be to switch local telephone providers for a provider with similar product offering at various price levels. Figure 4 shows the results of these questions.

Telephone Service (continued)

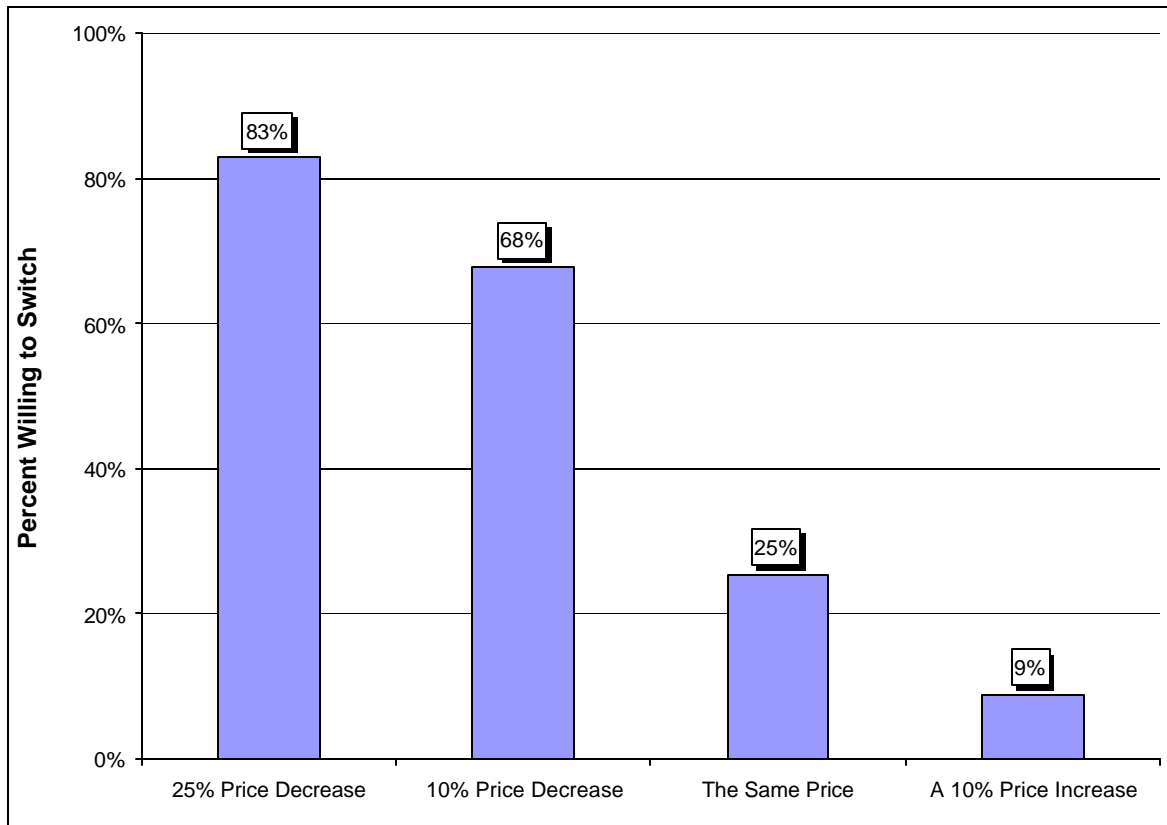


Figure 4: Propensity to Switch Telephone Providers

Fiber Optic Connection

The survey asked a series of questions regarding fiber optic connectivity. The survey results indicated that:

- 32% of respondents indicated they are interested in a fiber optic link within their community. An additional 43% may be interested.
- 24% of Kalamazoo County businesses responded that they would be interested in a fiber optic connection with other communities within Kalamazoo County. An additional 37% may be interested. Of those that responded that they would be interested in a fiber optic connections with other cities, the highest level of interest is in the following communities:
 - 88% Kalamazoo
 - 77% Portage
 - 48% Parchment
 - 44% Vicksburg
 - 40% Galesburg
 - 43% Schoolcraft

Fiber Optic Connection (continued)

- 24% of businesses responded that they would be interested in a fiber optic connection with offices or locations outside of Kalamazoo County. 30% indicated that they may be interested. The city or region of these locations follow:
 - 50% Area 1 (Berrien, Van Buren, Cass)
 - 73% Area 2 (Allegan, Kalamazoo, St. Joseph)
 - 50% Area 3 (Calhoun, Branch, Hillsdale, Jackson, Lenawee)
 - 55% Area 4 (Kent, Ottawa, Muskegon, Ionia, Barry)
 - 37% Area 5 (Genesee, Shiawassee, Macomb, Oakland, Livingston, Washtenaw, Wayne, Monroe)
 - 18% Area 6 (Huron, Tuscola, Lapeer, Sanilac, St. Clair)
 - 28% Area 7 (Clare, Osceola, Mecosta, Montcalm, Isabella, Gratiot, Clinton, Ingham, Eaton)
 - 19% Area 8 (Bay, Gladwin, Midland, Arenac, Saginaw)
 - 25% Area 9 (Grand Traverse, Leelanau, Manistee, Benzie, Mason, Oceana, Wexford, Lake, Newaygo)
 - 15% Area 10 (Charlevoix, Emmet, Cheboygan, Presque Isle, Montmorency, Otsego, Antrim, Kalkaska, Crawford, Oscoda, Alpena, Alcona, Ogemaw, Roscommon)
 - 16% Area 11 (Upper Peninsula of Michigan)
 - 41% Area 12 (Gary/Chicago Area)
 - 38% Area 13 (N. Indiana and N. Ohio Area)

- Of businesses that indicated interest in establishing a fiber optic connection with other regions within the U.S., the level of interest in each region follows:
 - 33% Central
 - 85% Midwest
 - 45% Northeast
 - 26% Northwest
 - 32% South
 - 44% Southeast
 - 37% Southwest

- Of businesses that indicated interest in establishing a fiber optic connection with international regions, the level of interest in each region follows:
 - 17% Africa
 - 29% Asia
 - 24% Australia
 - 60% Canada
 - 21% Central America
 - 64% Europe
 - 32% Mexico
 - 15% Middle East
 - 24% South America

Customer Value Management (CVM)

A portion of the survey was dedicated to measuring how satisfied Kalamazoo County businesses are with their electric, local telephone, cable/satellite, Internet and cellular telephone services.

The purpose of this is to understand how each business views the performance of one service provider relative to the others in shared service attributes such as base rates and billing accuracy. This data gives some idea of how vulnerable incumbent providers may be to increased competition, what niche (e.g., cut-rate service, premium service at premium prices) incumbent providers occupy, and how effectively Kalamazoo County might translate its image to a broader scope. Exhibit 1c of this report summarizes this analysis.

In the analysis below, a variety of comparisons are made between the utilities. For example, Table 1 shows the average of the respondents' perception for overall performance and satisfaction for service providers.

Table 1: Comparison of Utility Performance Measures

<u>Utility</u>	SCORE SUMMARY (7 highest, 1 lowest)					
	<u>% Less Than 3</u>	<u>Average Overall Performance</u>	<u>% Greater Than 5</u>	<u>% Less Than 3</u>	<u>Average Overall Satisfaction</u>	<u>% Greater Than 5</u>
Electric	3%	4.63	27%	6%	4.57	28%
Local Telephone	8%	4.27	18%	10%	4.19	17%
Cable Television	8%	3.94	12%	17%	3.80	12%
Internet	6%	4.38	20%	8%	4.32	20%
Cellular Telephone	9%	4.17	15%	11%	4.11	16%

As seen, the electric provider scored relatively high compared to the other utilities and cable television scored relatively low compared to the other utilities.

Survey Response Data

Surveys were sent to 9,302 businesses in Kalamazoo County, of which 737 returned completed surveys. The tolerance interval for 737 responses at the 95% confidence level is $\pm 3.8\%$. That is, one can estimate that 19 times out of 20, the true characteristic of the entire population is within $\pm 3.8\%$ of what the survey data indicate.

Kalamazoo County

Business Survey Summary

Section 2:

Business Survey Responses

Kalamazoo County

Business Survey

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Section 2: Business Survey Responses

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Q22c	\$50 to \$74 per month	
Q22d	\$75 to \$99 per month	
Q22e	\$100 to \$149 per month	
Q22f	\$150 to \$199 per month	
Q22g	\$200 or more per month	
Q23	Willingness to purchase Internet service that offers AT LEAST 1,544 Kpbs downstream AND upstream data rates for:	27
Q23a	Up to \$99 per month	
Q23b	\$100 to \$149 per month	
Q23c	\$150 to \$199 per month	
Q23d	\$200 to \$249 per month	
Q23e	\$250 to \$299 per month	
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Q23g	\$350 or more per month	
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Q29b	\$50 to \$99	
Q29c	\$100 to \$199	
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Q29e	\$300 to \$499	
Q29f	More than \$500	
Q30	Willingness to switch local telephone providers with a similar product offering for a:	36
Q30a	A 25% price decrease?	
Q30b	A 10% price decrease?	
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Kalamazoo County

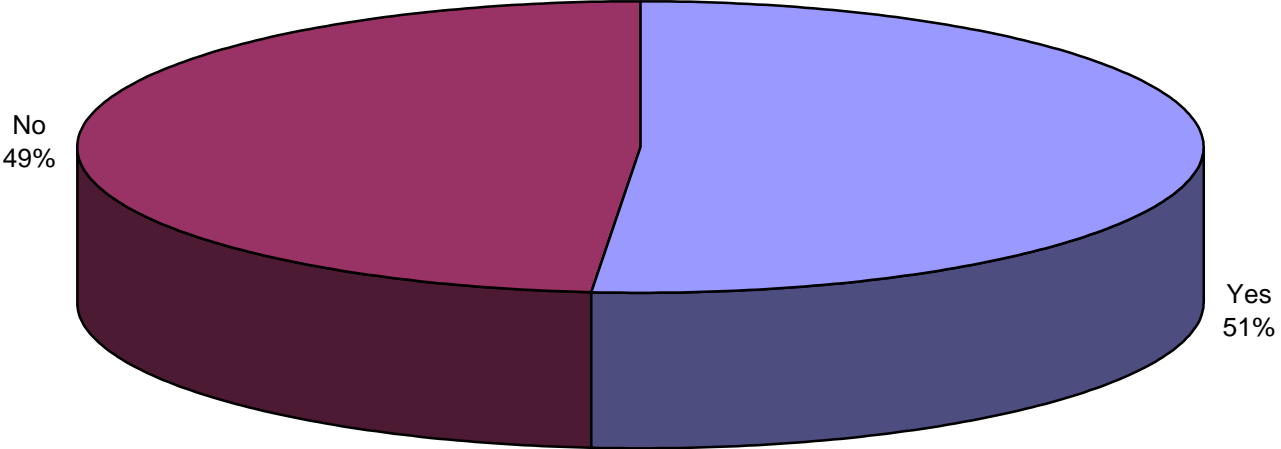
Business Survey

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Section 2: Business Survey Responses

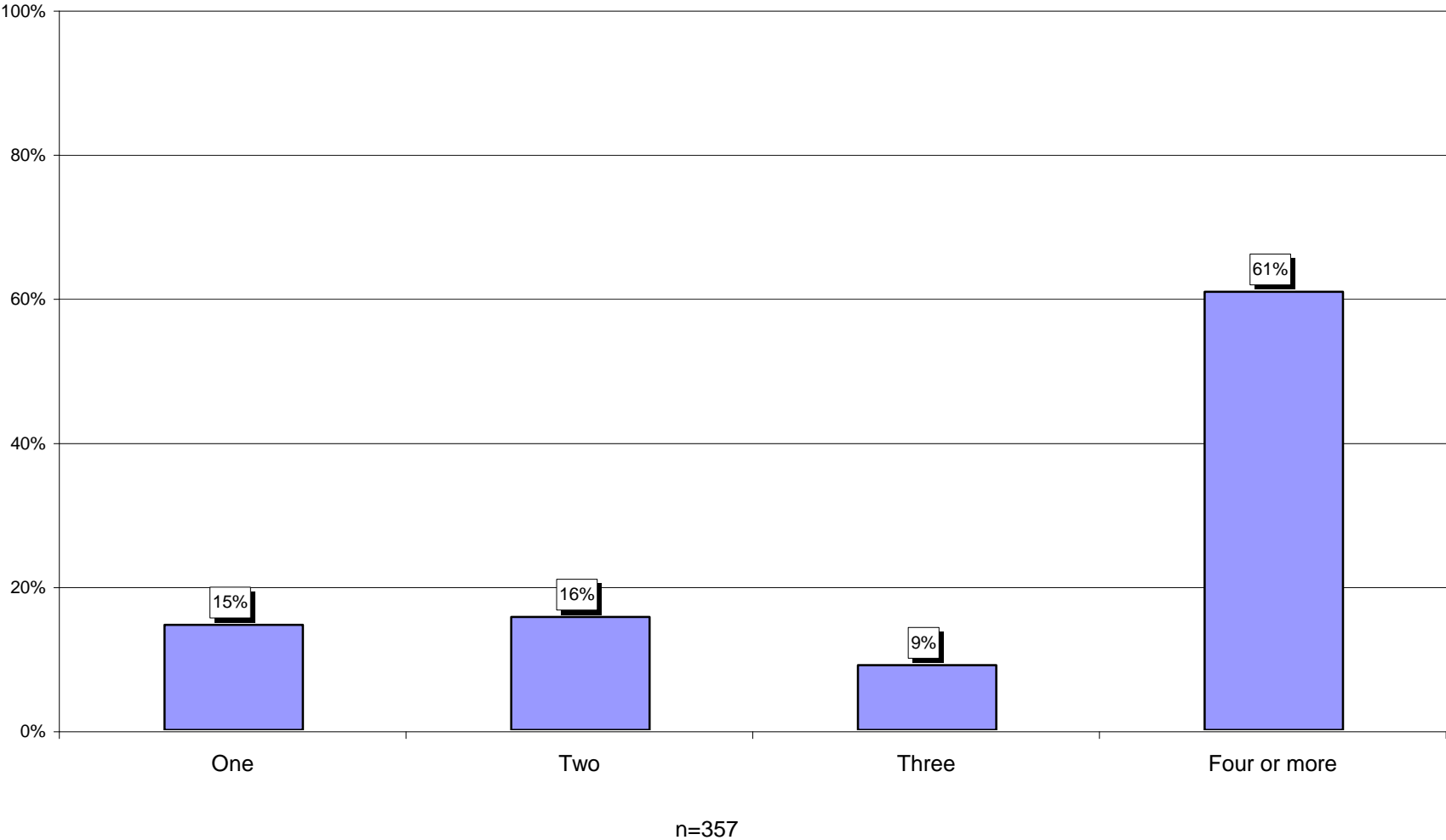
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Q55	What do you think the MAIN role of the government should be to help ensure broadband Internet access is available and affordable?	52

Q1. Are there locations within Kalamazoo County with which you exchange data?

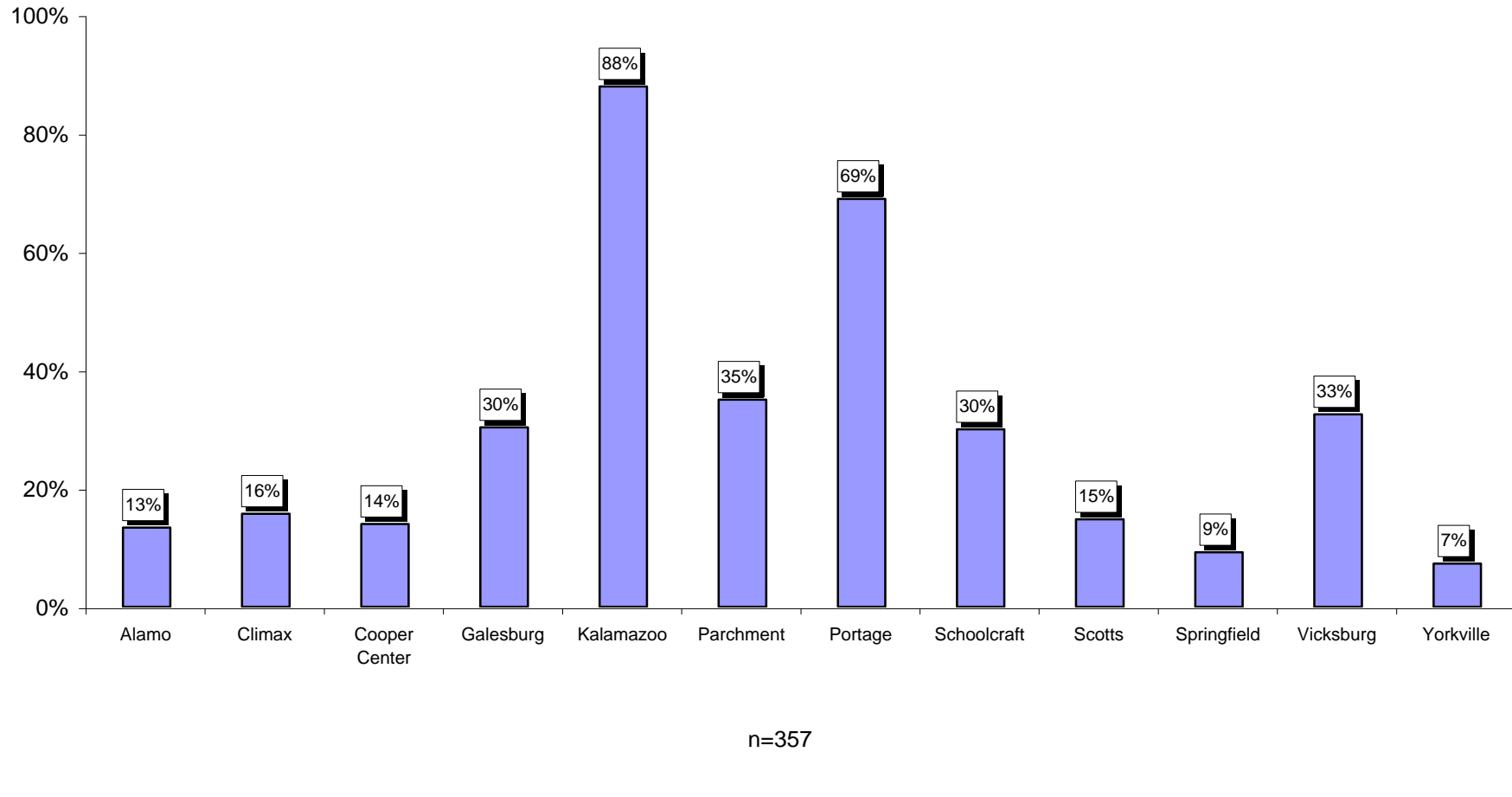


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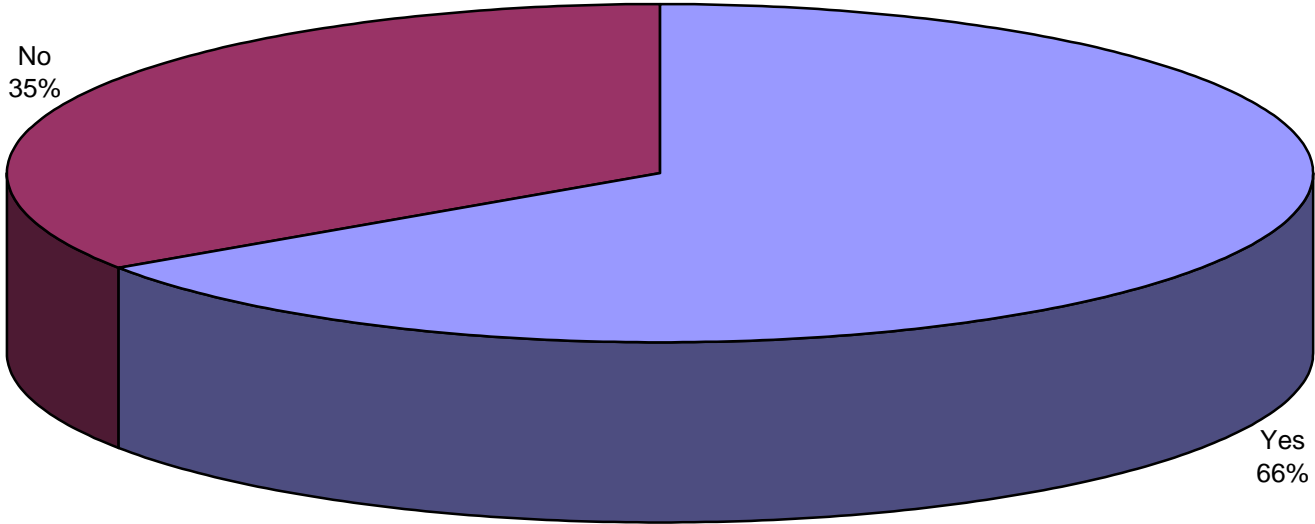
Q2. With how many locations within Kalamazoo County do you exchange data?



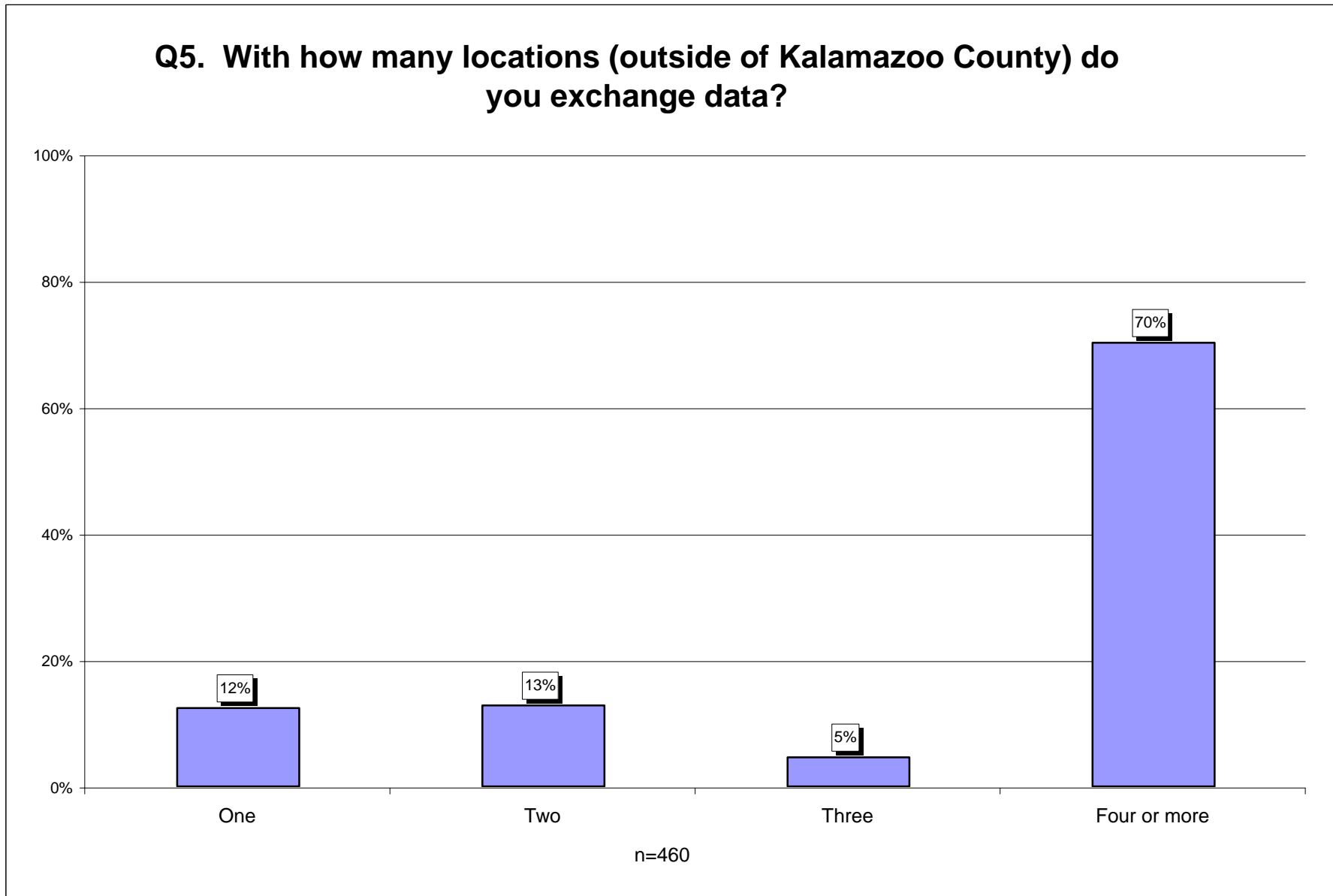
Q3. Which communities in Kalamazoo County do you exchange data with?



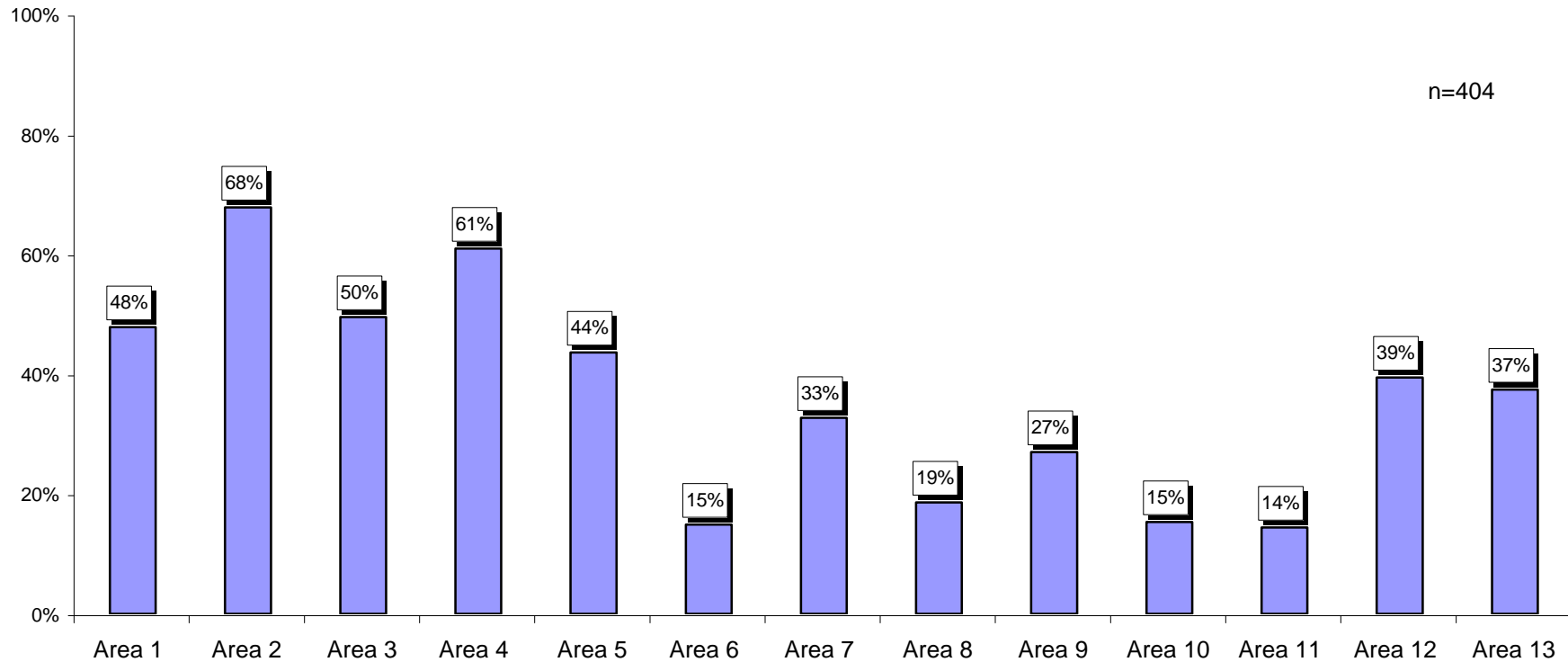
Q4. Are there locations (outside of Kalamazoo County) with which you exchange data?



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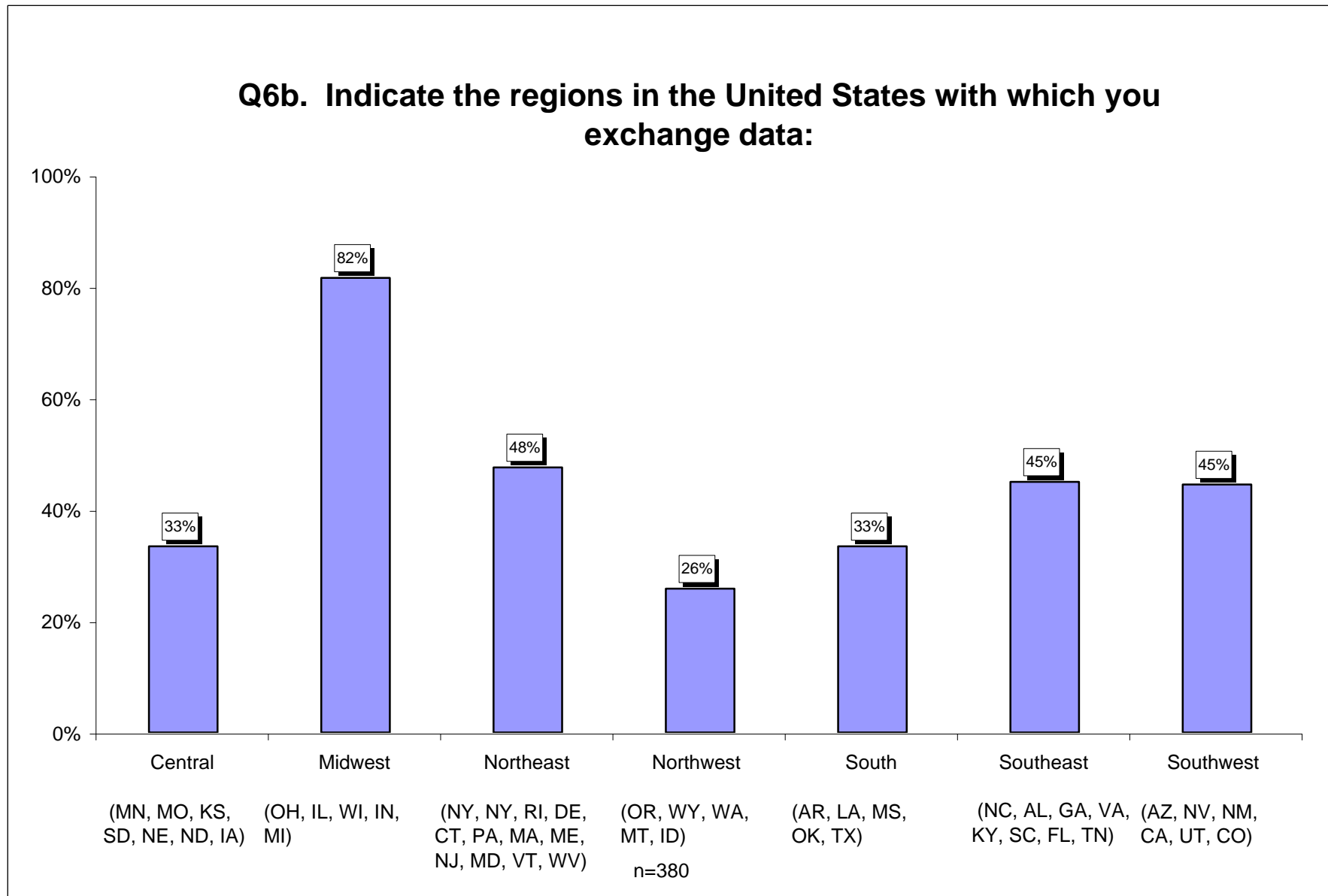


Q6a. Indicate the regions of Michigan with which you exchange data:

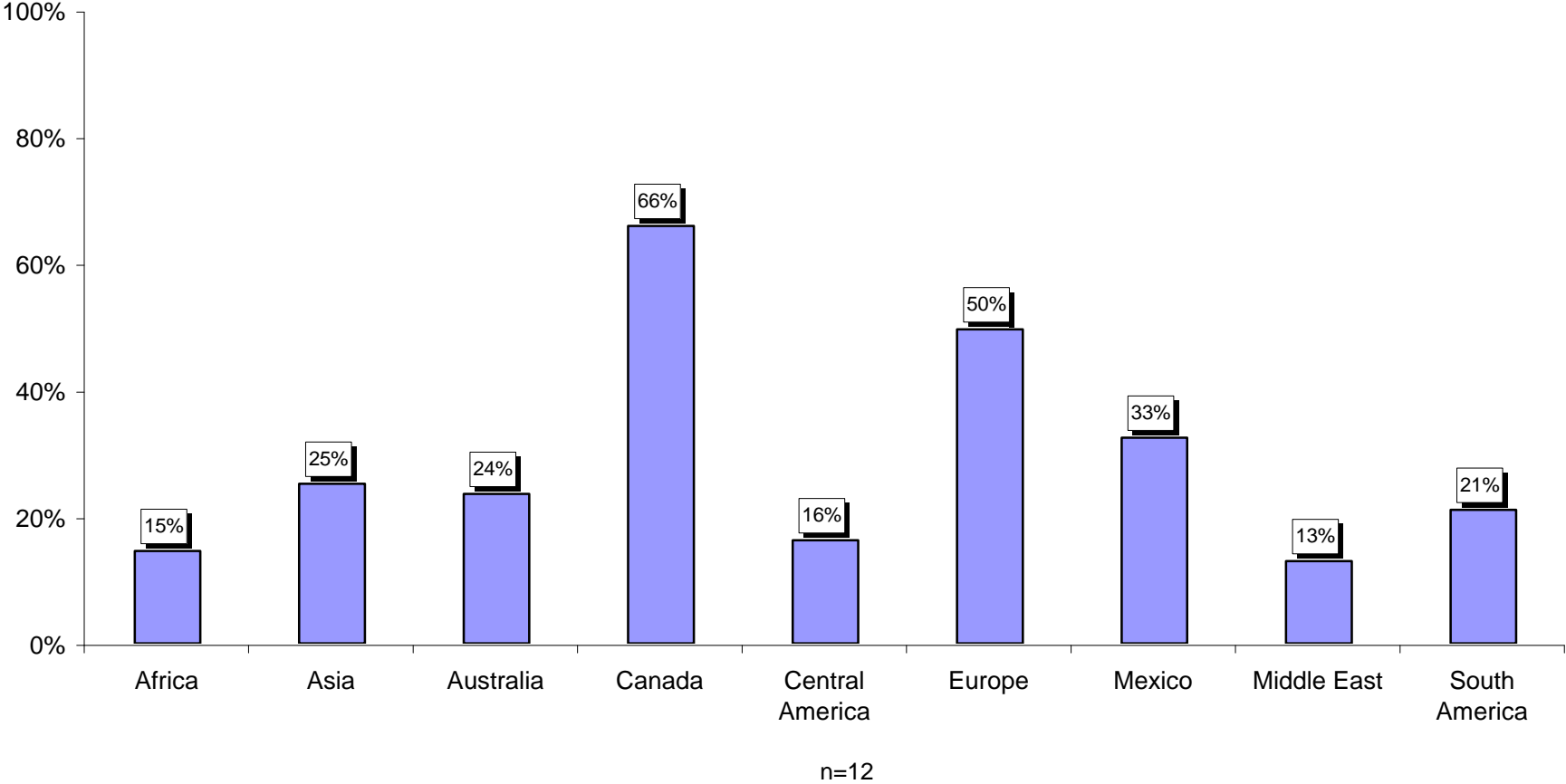


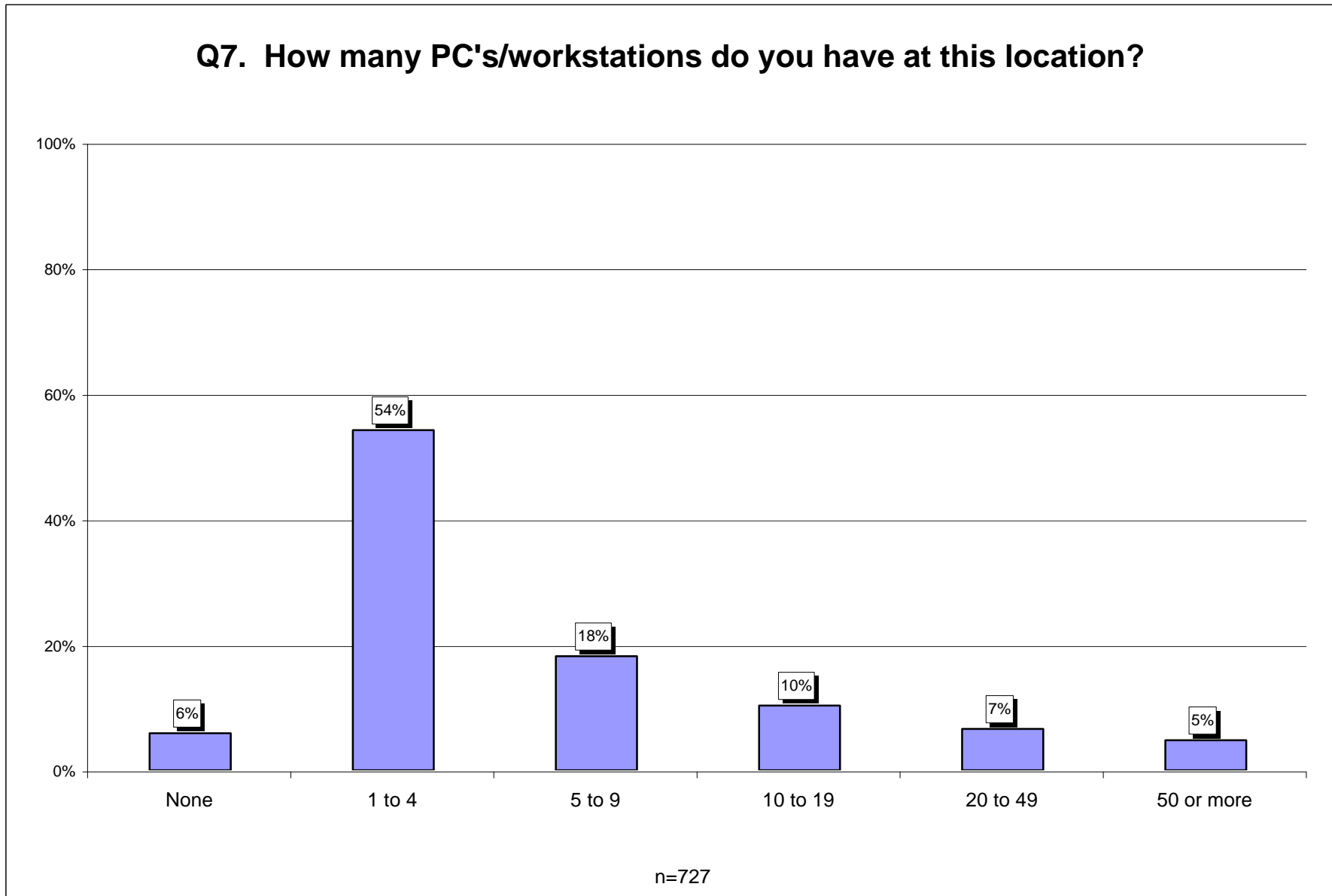
Area 1 (Berrien, Van Buren, Cass)
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Area 5 (Genesee, Shiawassee, Macomb, Oakland, Livingston, Washtenaw, Wayne, Monroe)
Area 6 (Huron, Tuscola, Lapeer, Sanilac, St. Clair)
Area 7 (Clare, Osceola, Mecosta, Montcalm, Isabella, Gratiot, Clinton, Ingham, Eaton)

Area 8 (Bay, Gladwin, Midland, Arenac, Saginaw)
Area 9 (Grand Traverse, Leelanau, Manistee, Benzie, Mason, Oceana, Wexford, Lake, Newaygo)
Area 10 (Char., Emm., Cheb., Prs. Is., Mont., Ots., Ant., Kalk., Craw., Osc., Alp., Alc., Oge., Ros.)
Area 11 (Upper Peninsula of Michigan)
Area 12 (Gary/Chicago Area)
Area 13 (N. Indiana and N. Ohio Area)

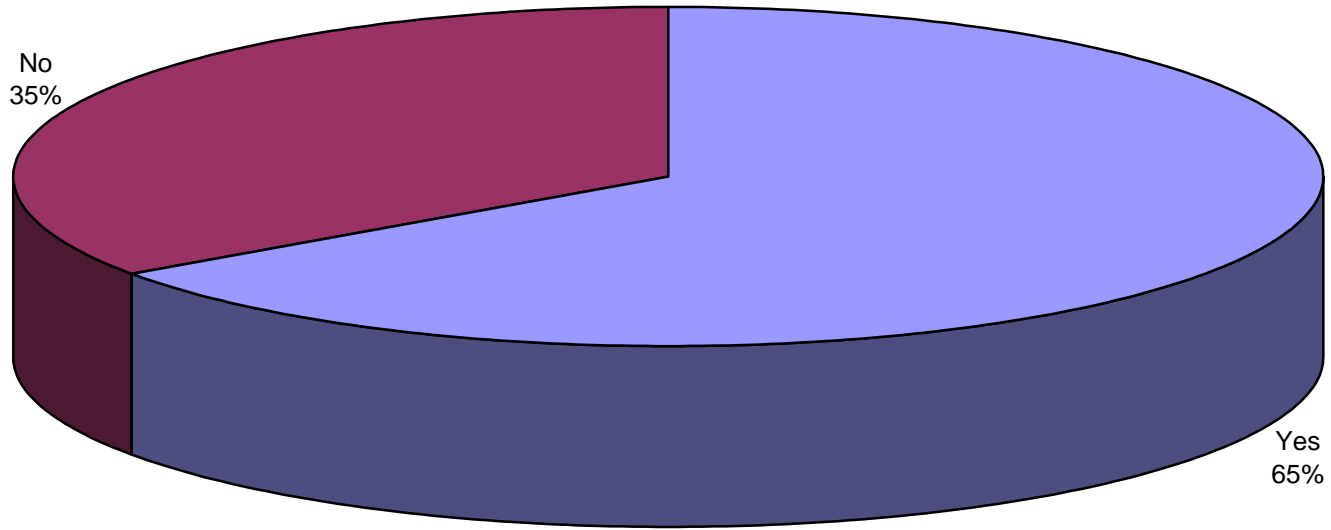


Q6c. Indicate the international regions with which you exchange data:



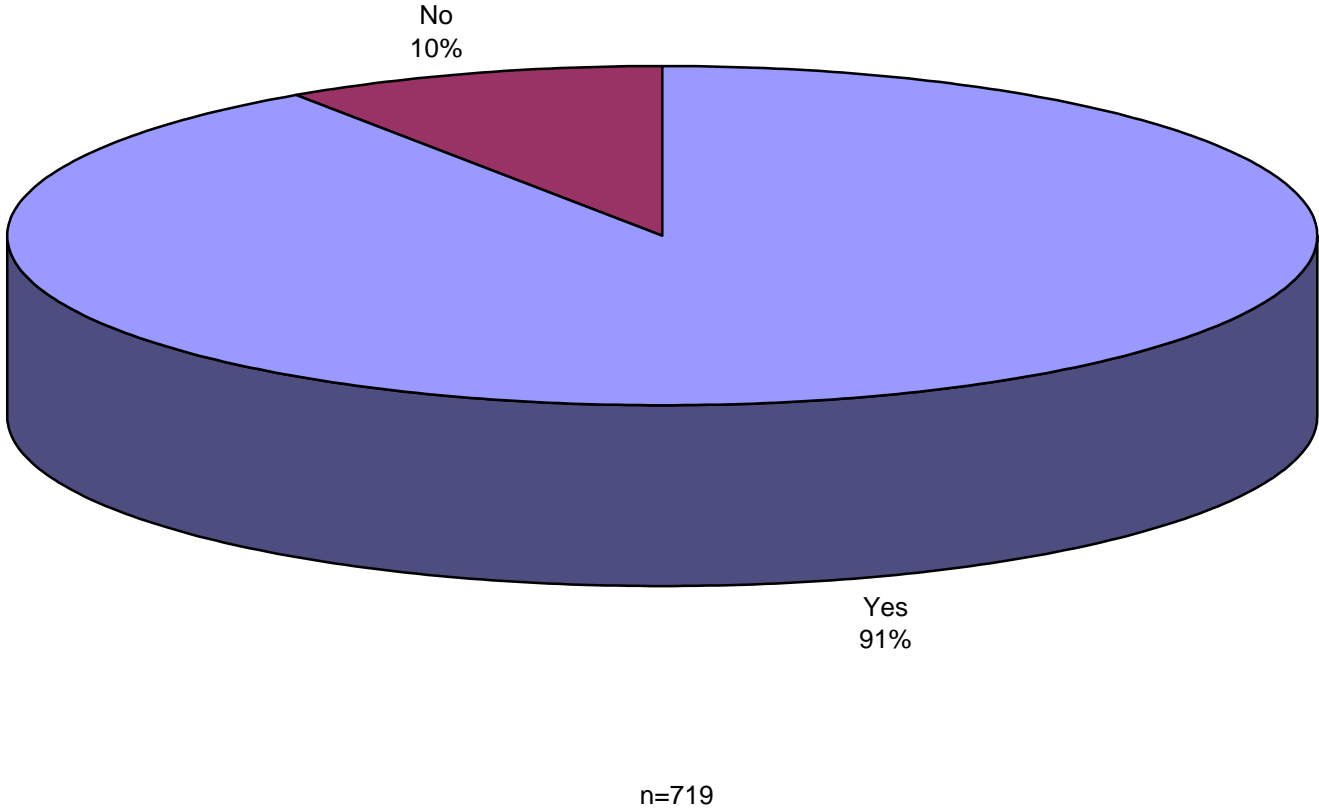


Q8. Are your computers connected with a Local Area Network (LAN)?

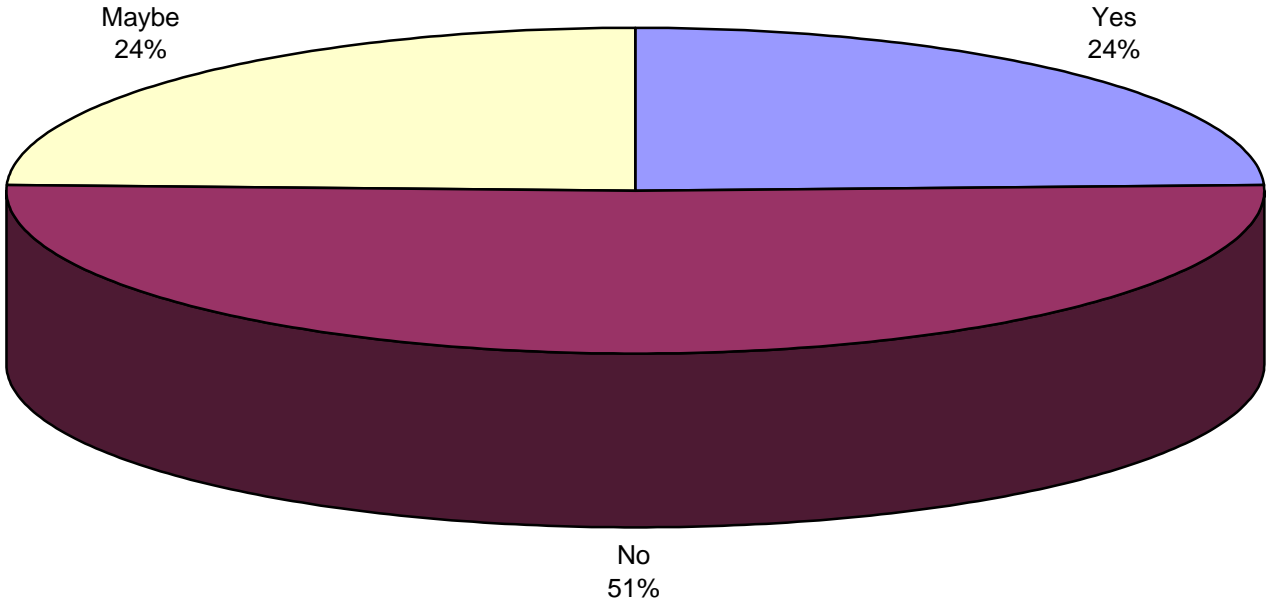


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Q9a. Do you have Internet access from this location?

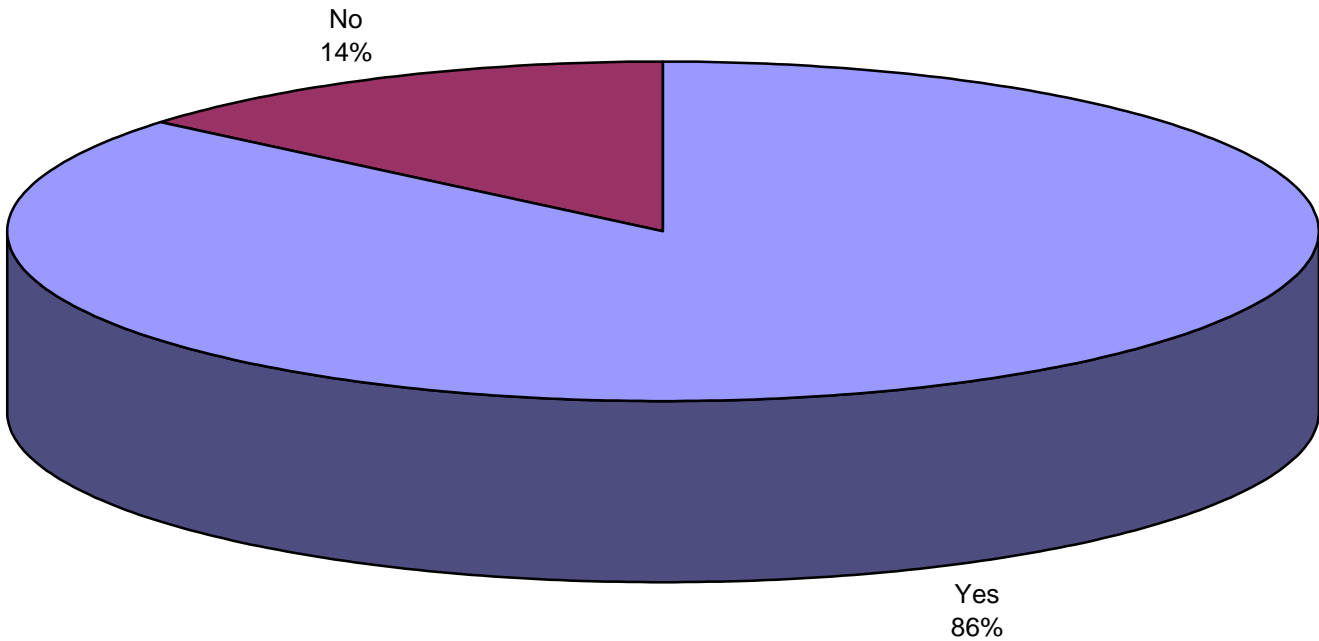


Q9b. Do you plan to obtain Internet access in the next year?

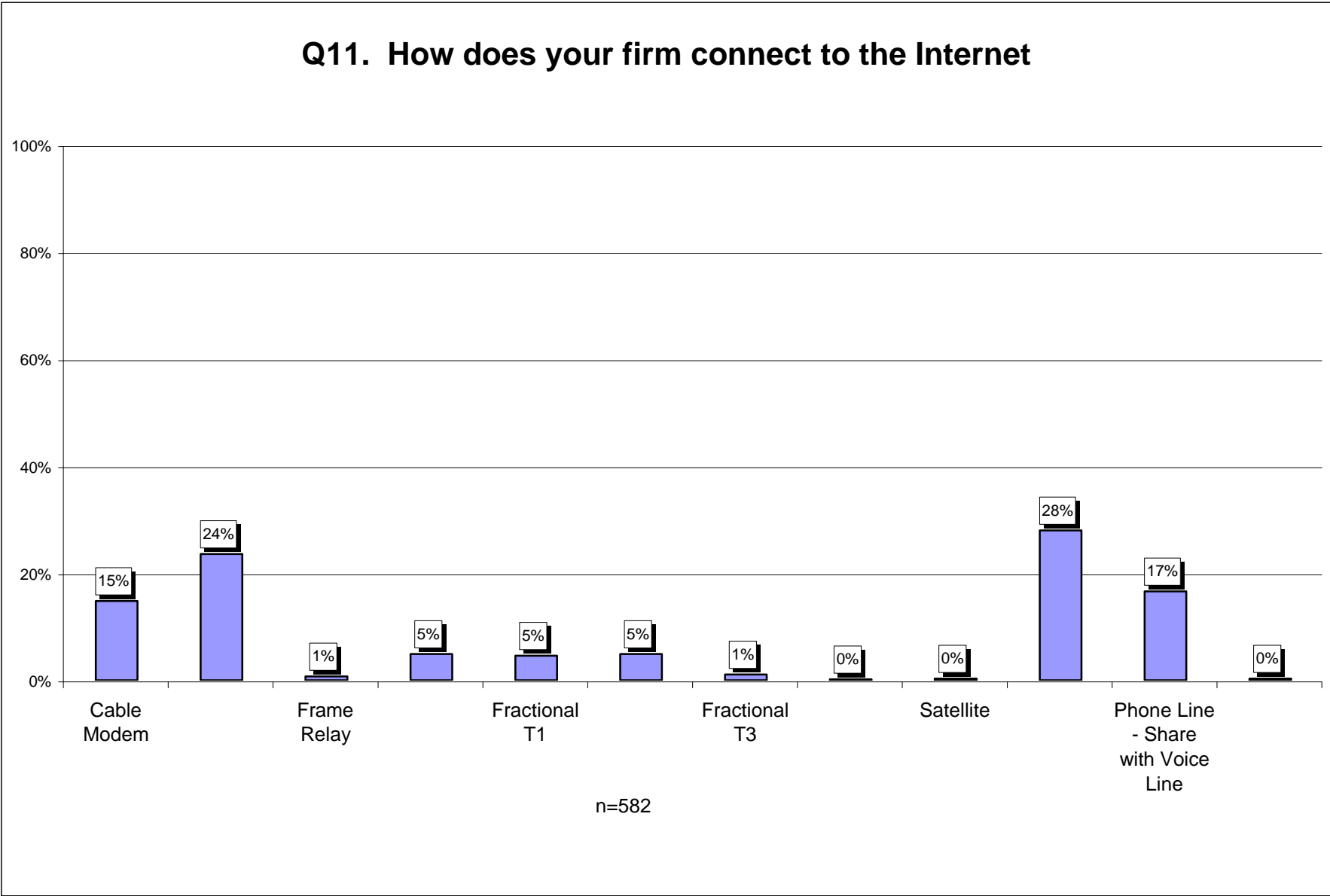


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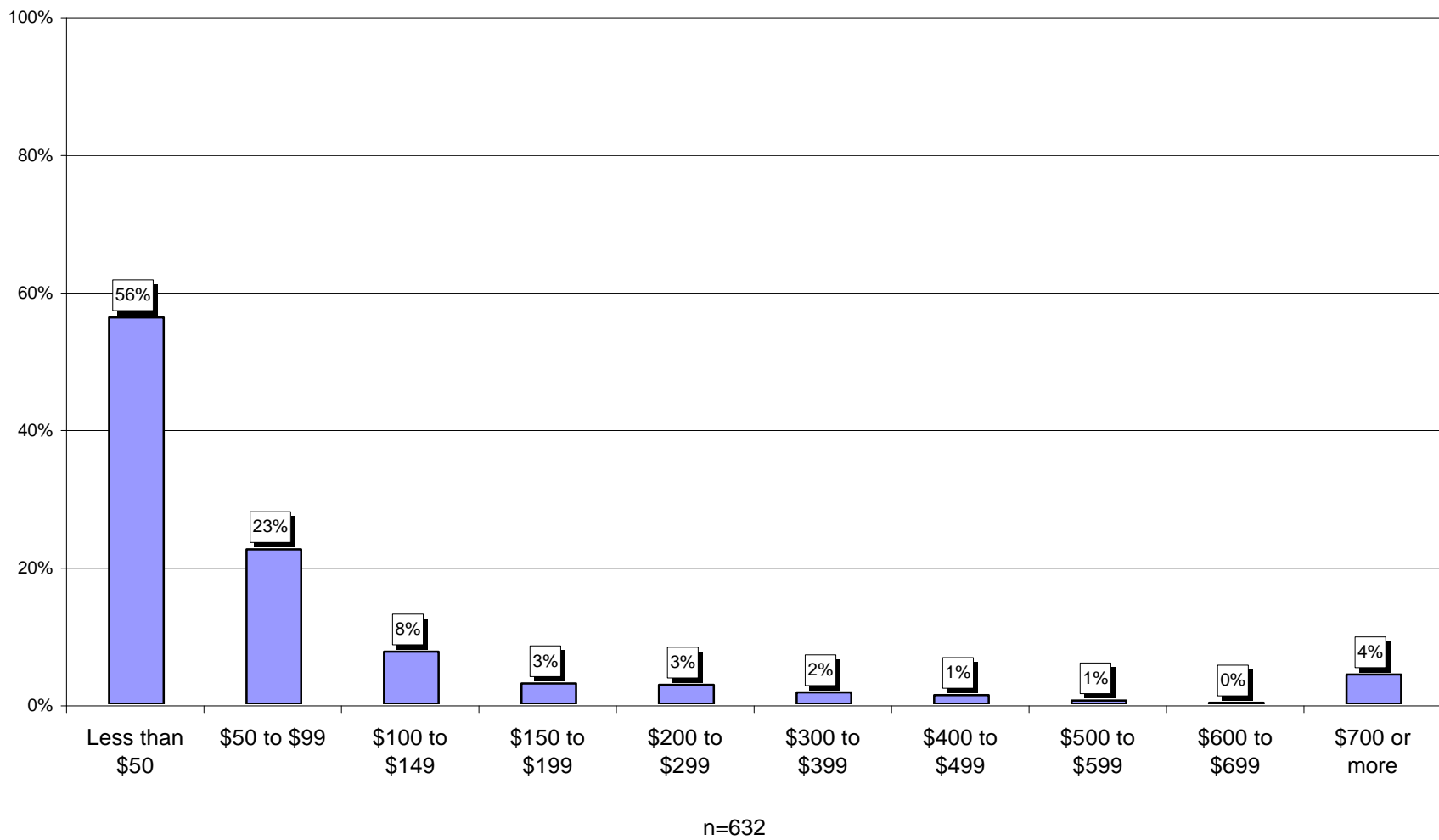
Q10. Do the majority of your computers have Internet access?

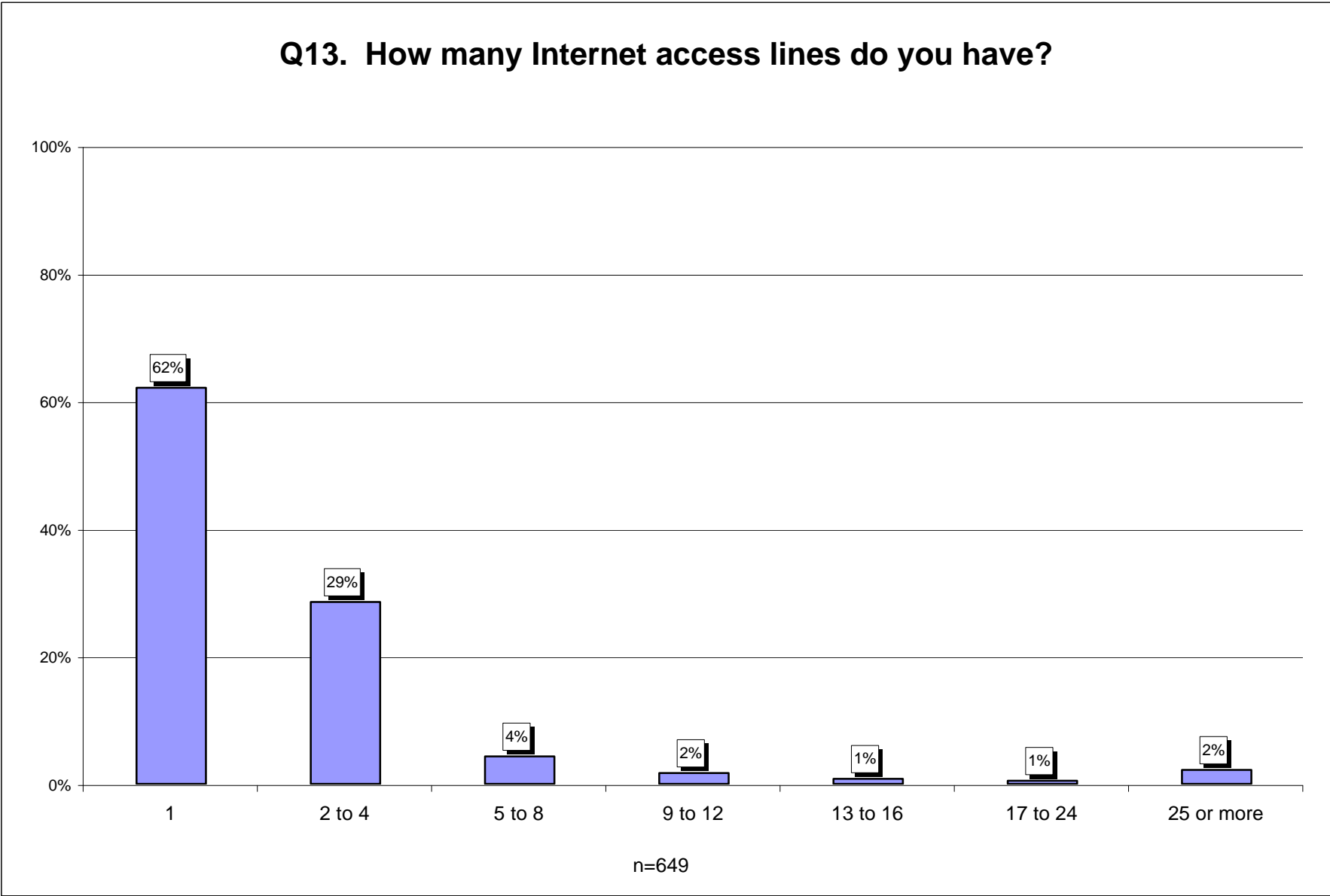


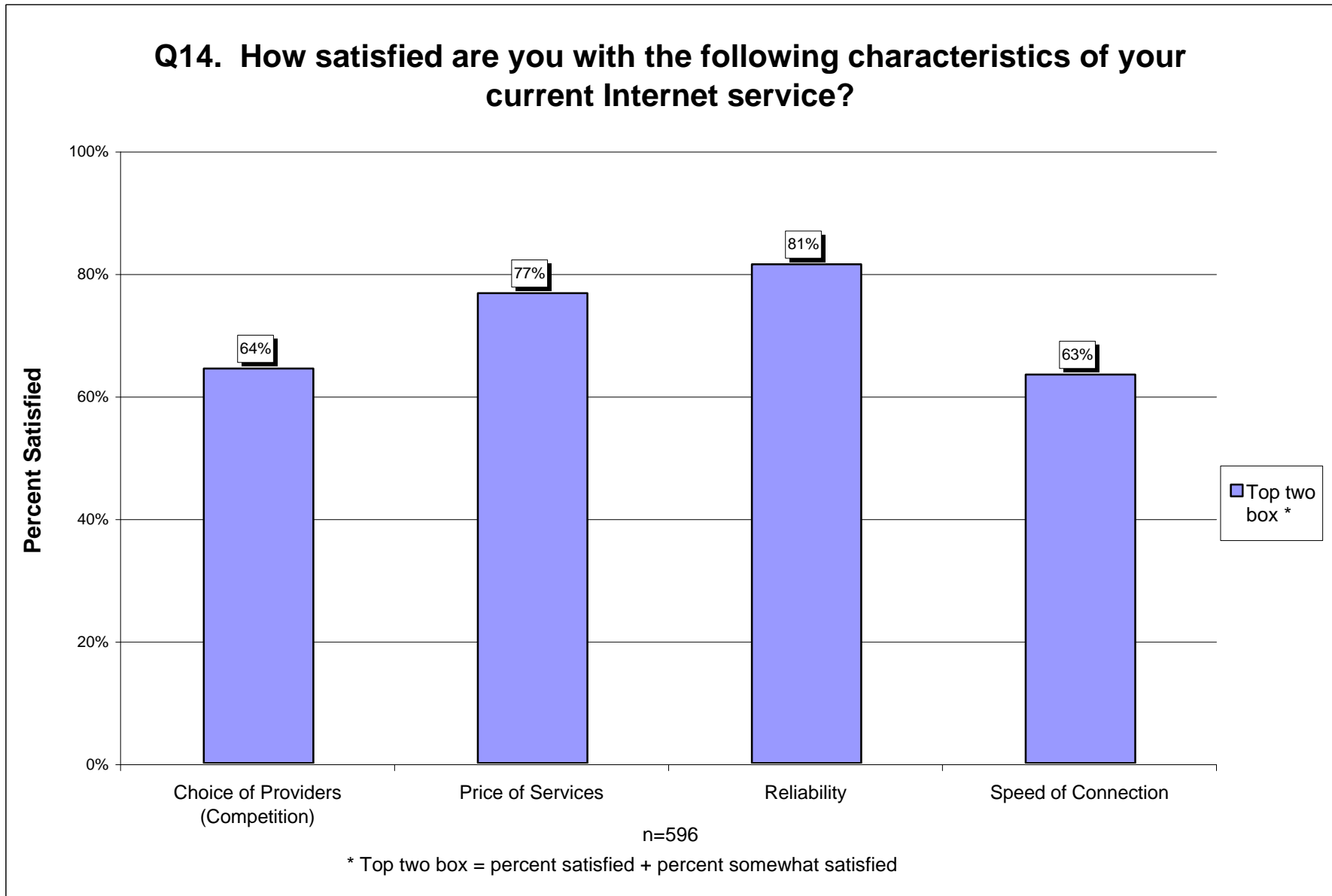
n=651



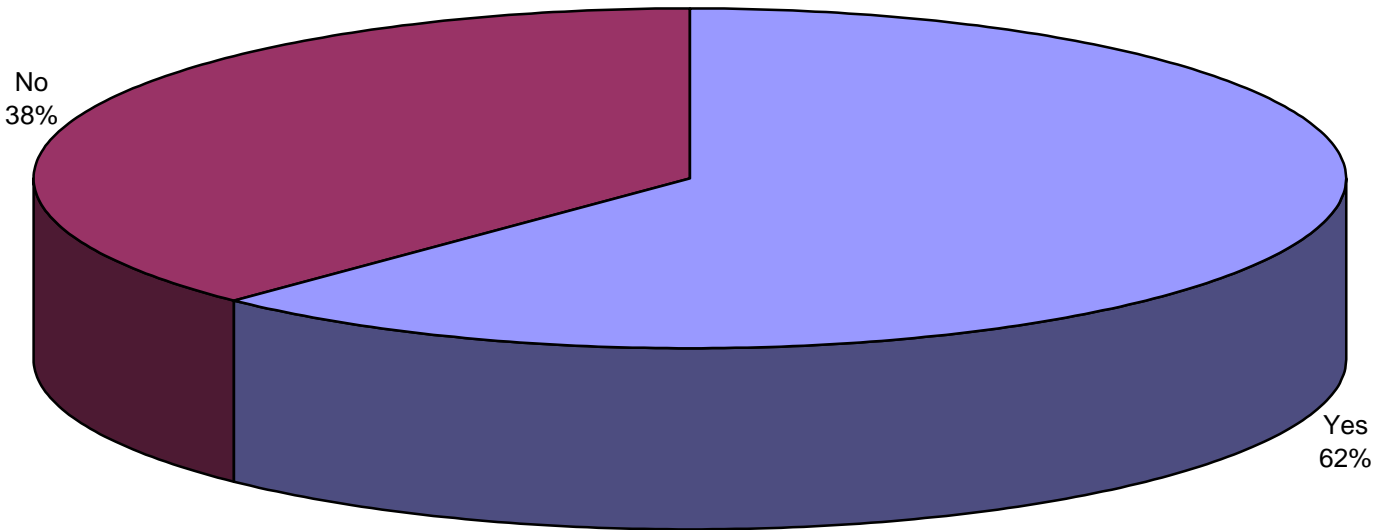
Q12. How much do you pay PER MONTH for Internet service at this location?





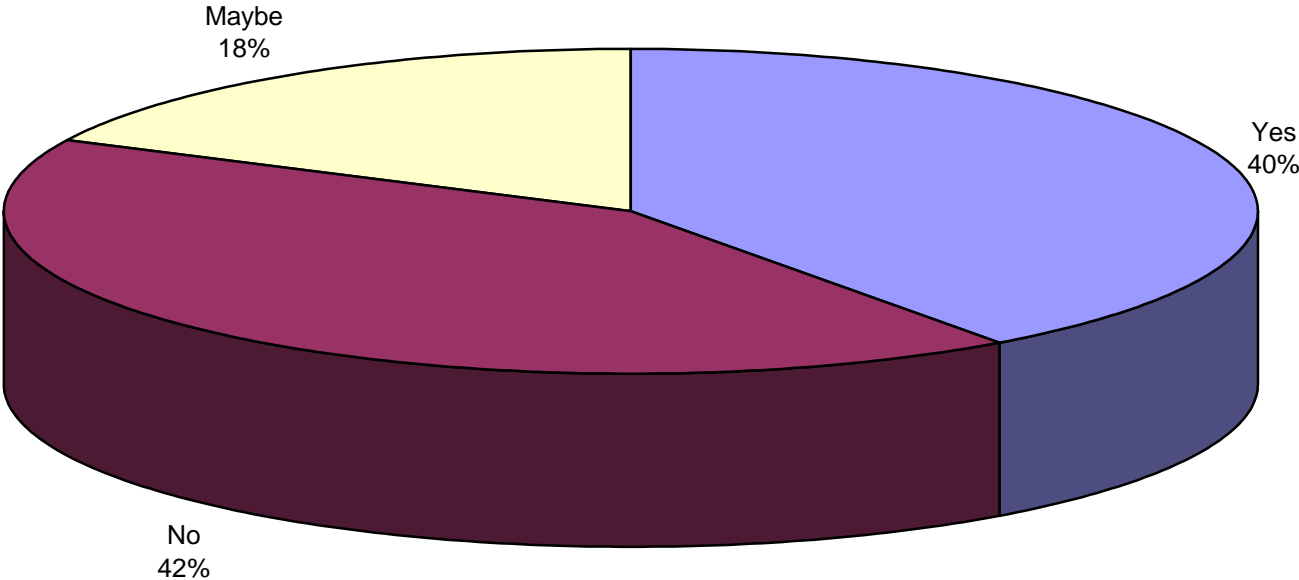


Q15. Do you have a company Web site?



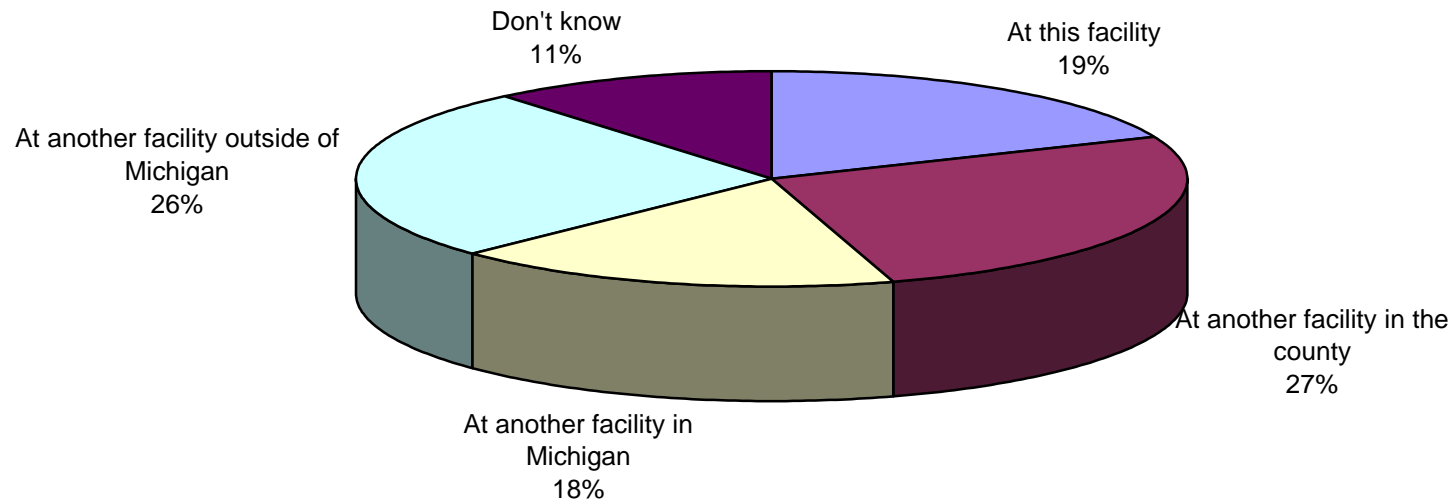
n=652

Q16. If you don't currently have a company Web site, do you plan to have a company Web site in the future?



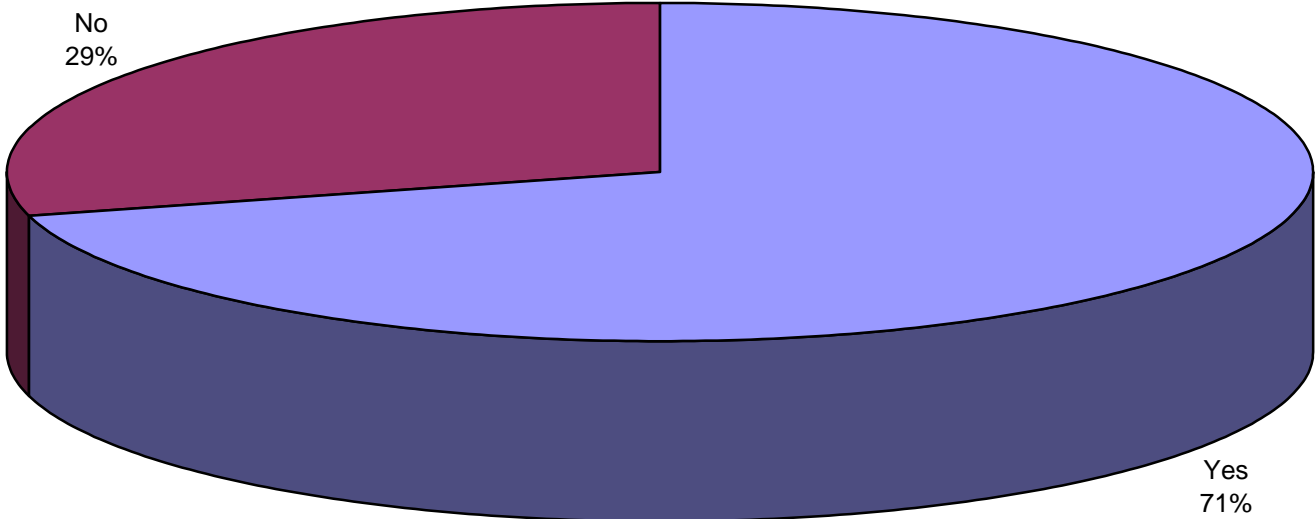
n=240

Q17. Indicate where your Web site is hosted or is planned to be hosted:



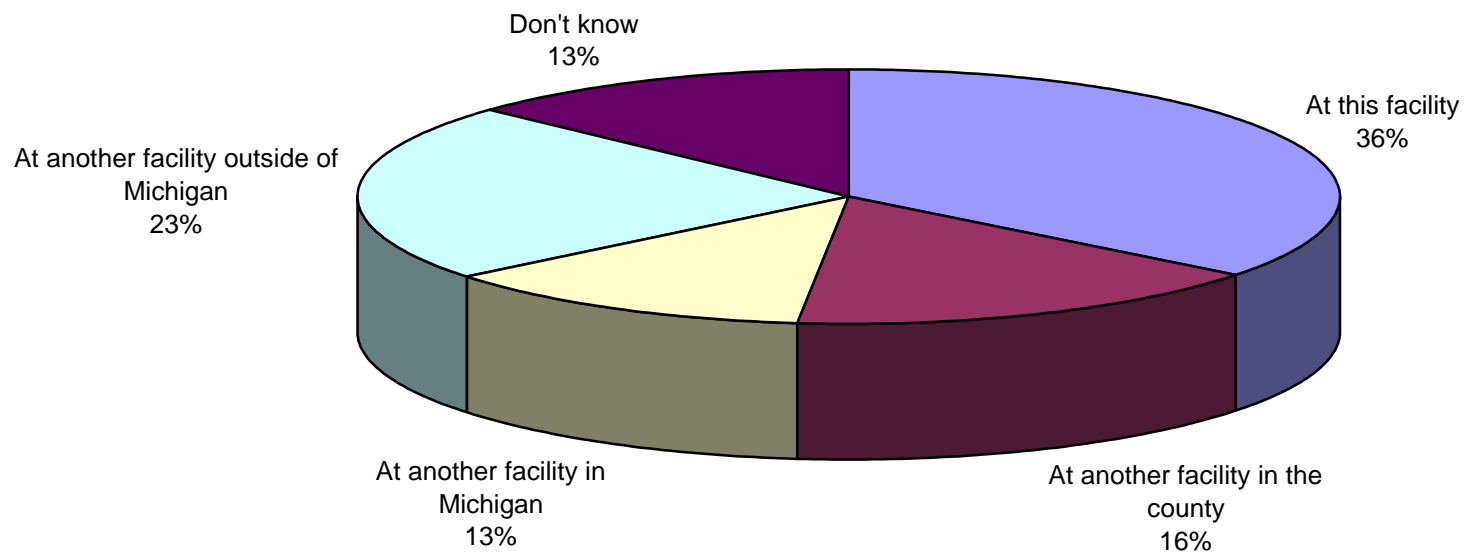
n=481

Q18. Do you have an e-mail server?



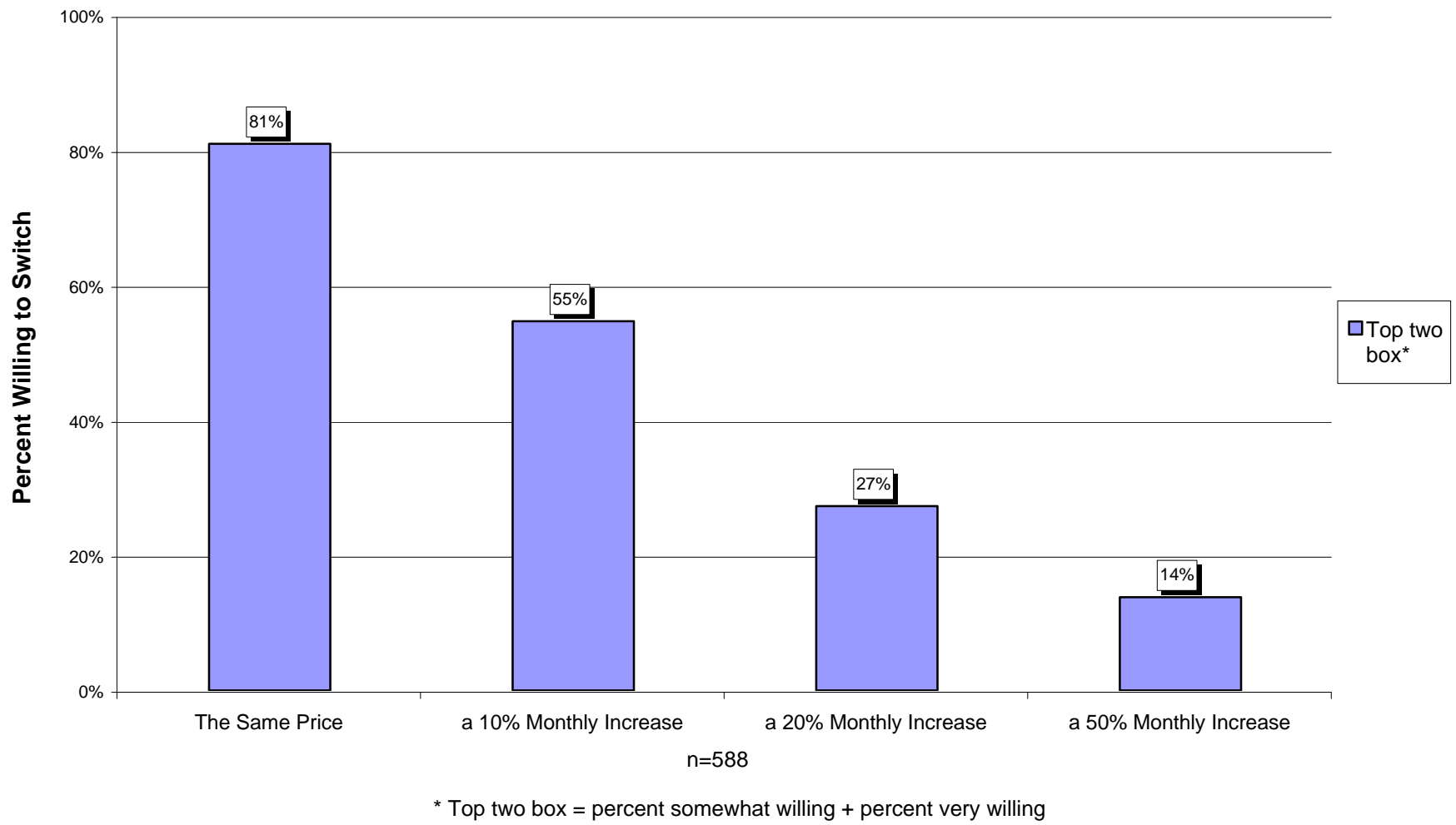
n=635

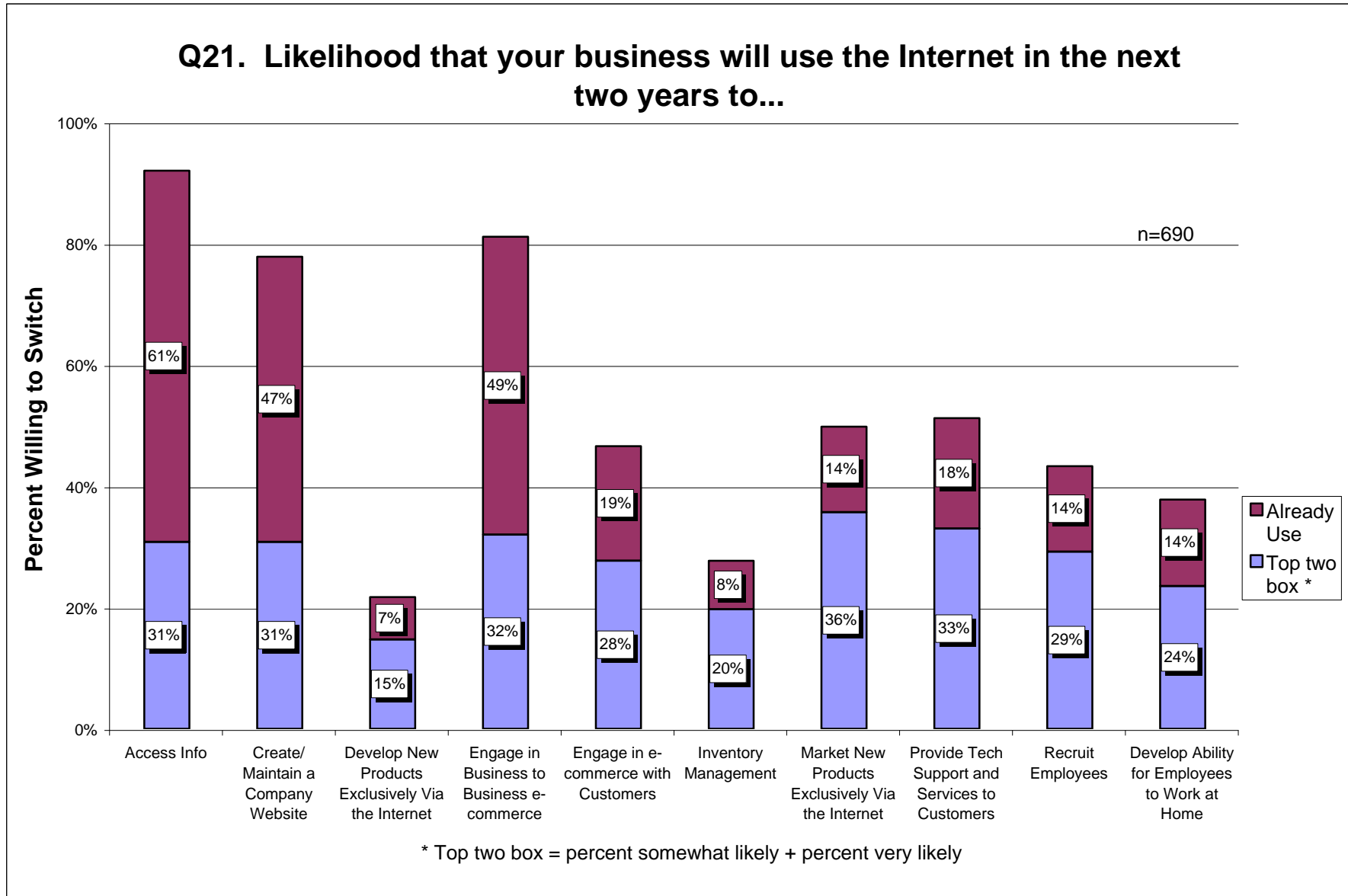
Q19. Indicate where your e-mail server is located:



n=386

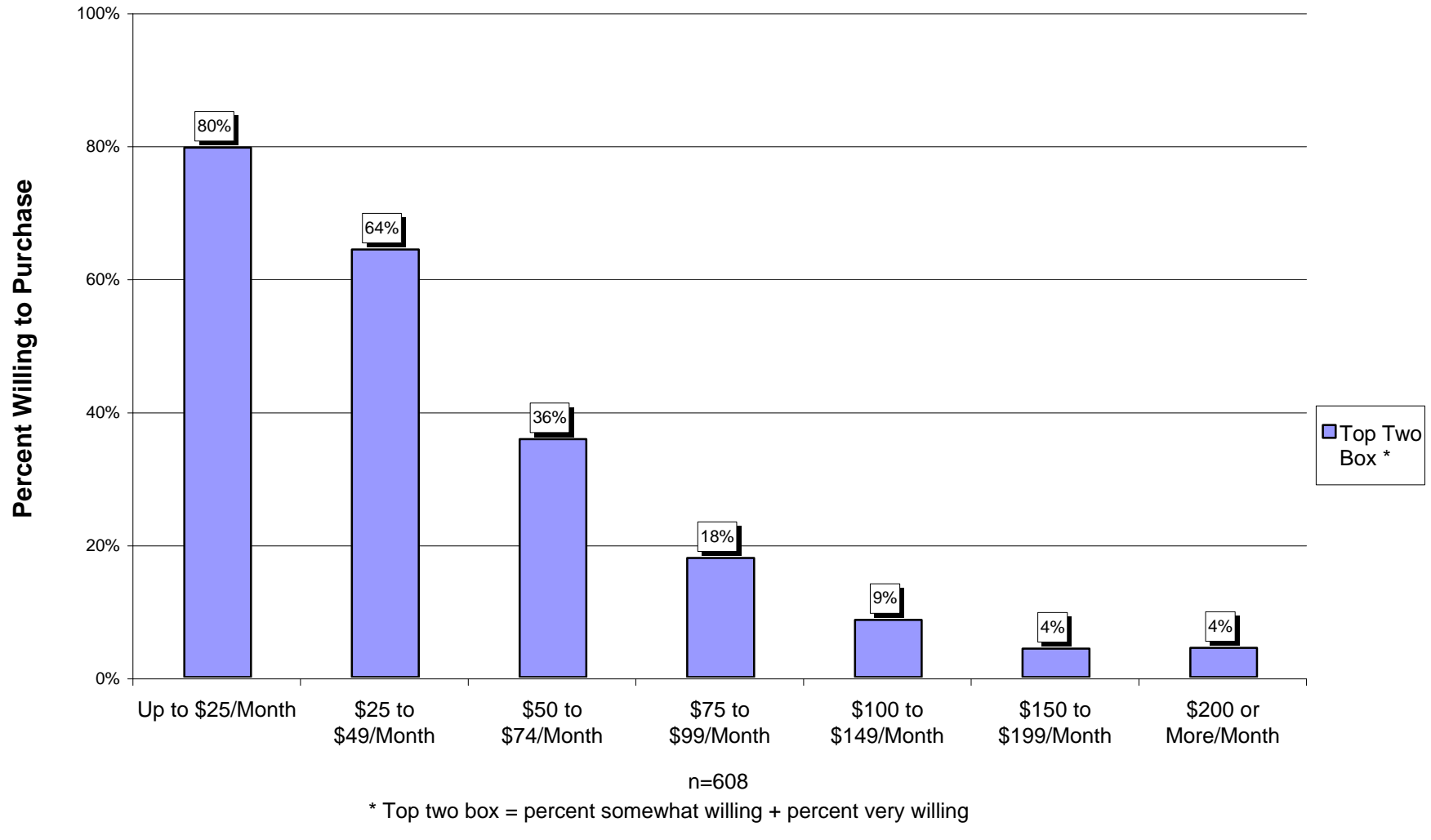
Q20. How willing would you be to switch to a service that offers an increased connection speed while being on-line all of the time for:

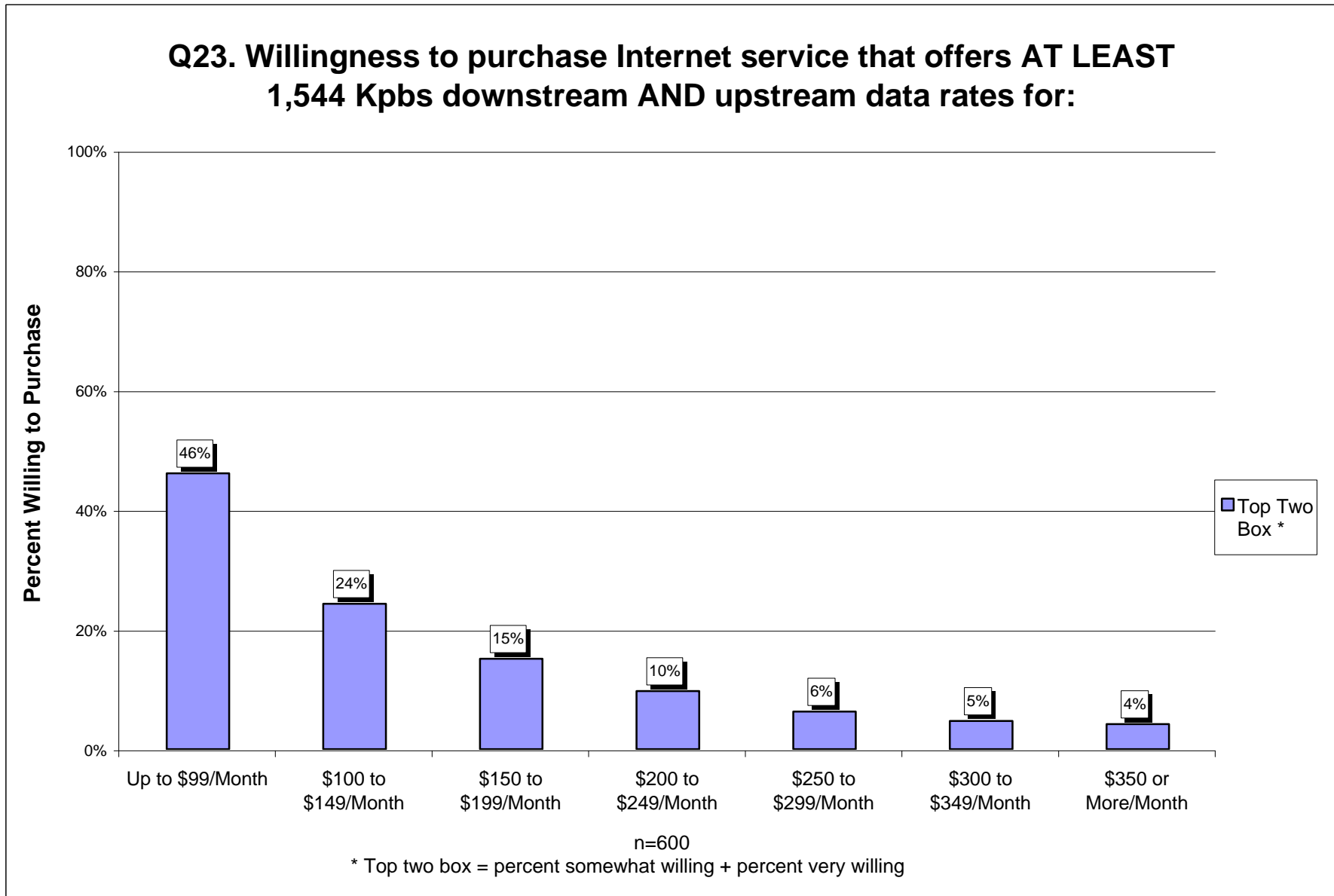




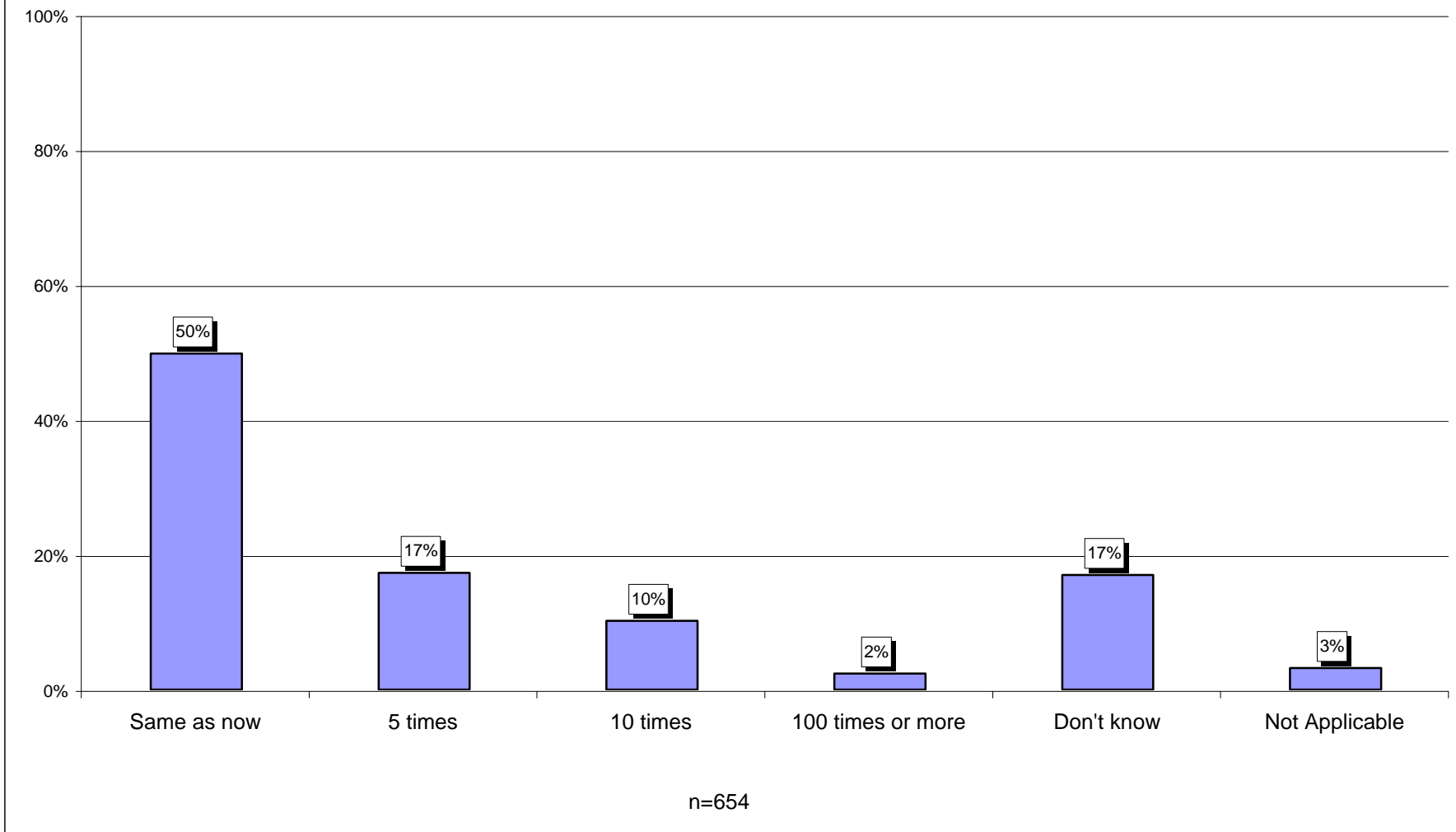
Q22-23 Definitions	
Upstream	Data transfer from your location to the Internet
Downstream	Data transfer from the Internet to your location
1,544 Kpbs	1,544,000 bits per second (Example: would take approximately 1.5 minutes to transfer an average drawing (CAD) file of 15,000 Kbytes)
256 Kpbs	256,000 bits per second (Example: would take approximately 9.5 minutes to transfer an average (CAD) file of 15,000 Kbytes)

Q22. Willingness to purchase Internet service that offers 1,544 Kpbs downstream and 256 Kpbs upstream data rates for:

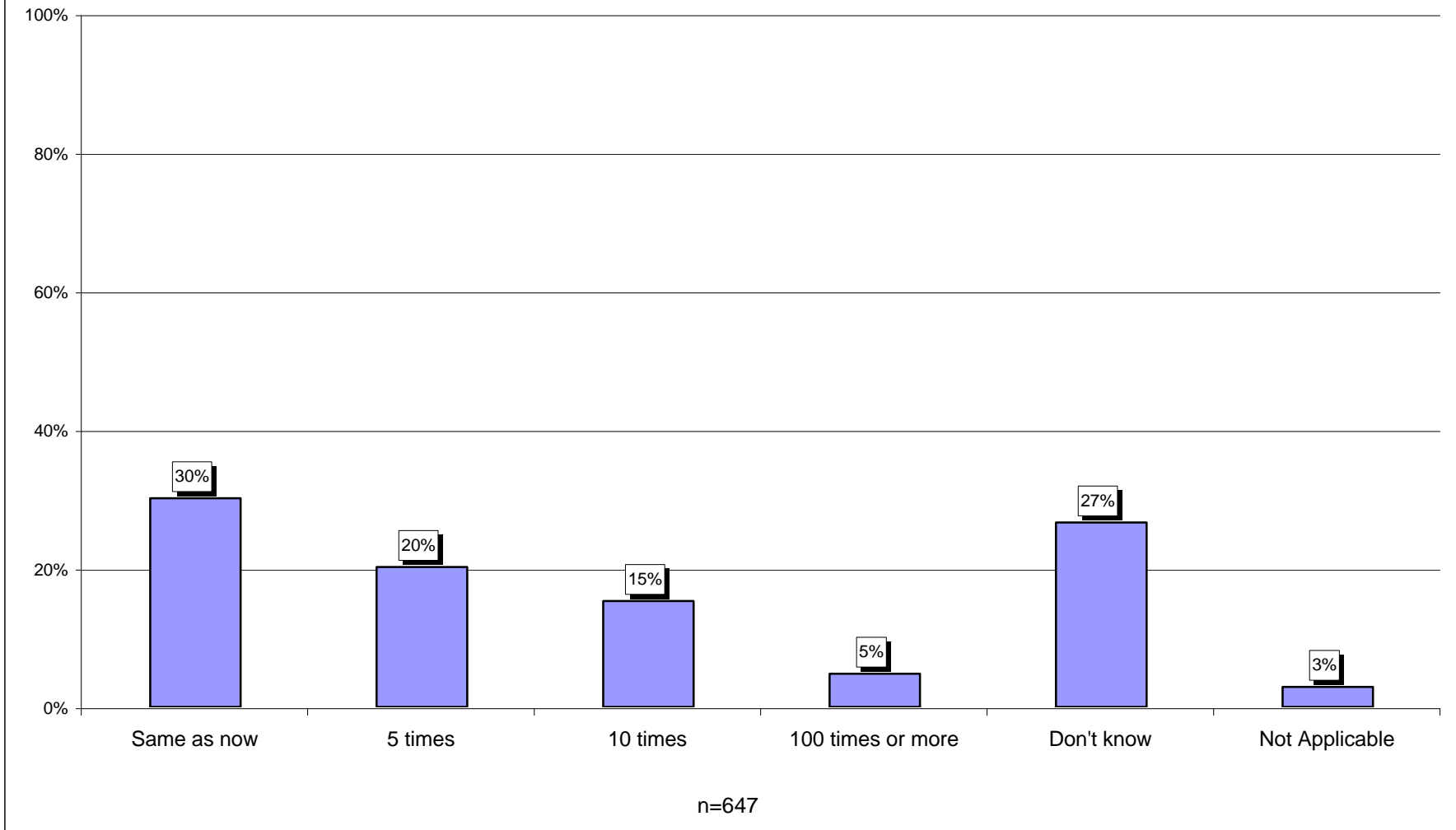


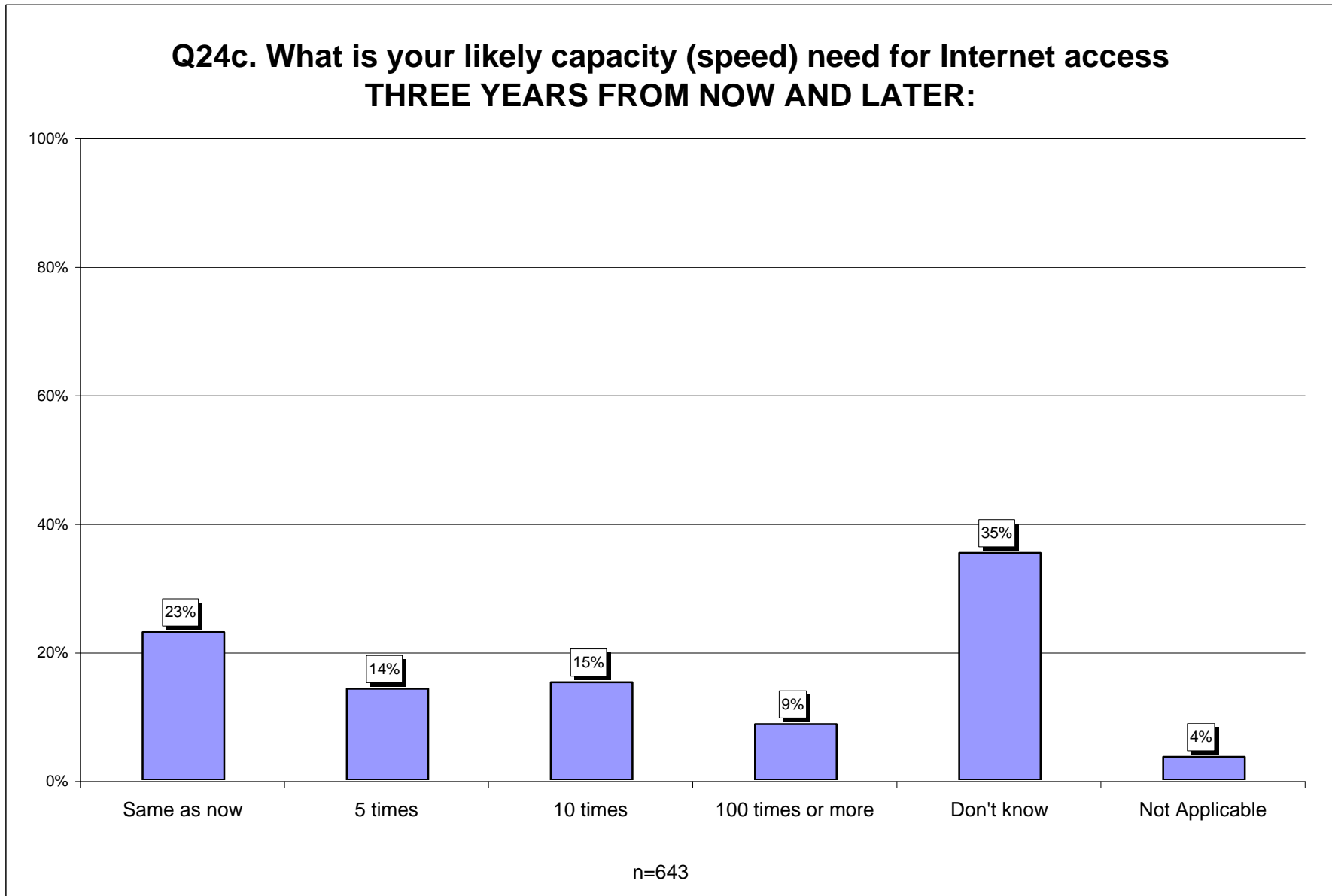


Q24a. What is your likely capacity (speed) need for Internet access ONE YEAR FROM NOW:

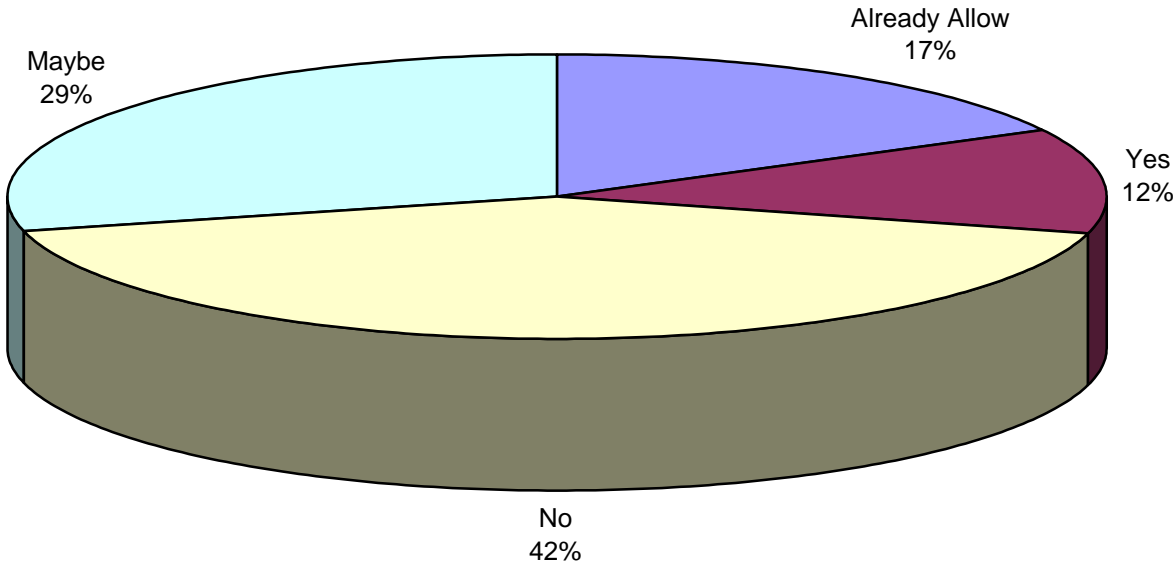


Q24b. What is your likely capacity (speed) need for Internet access TWO YEARS FROM NOW:

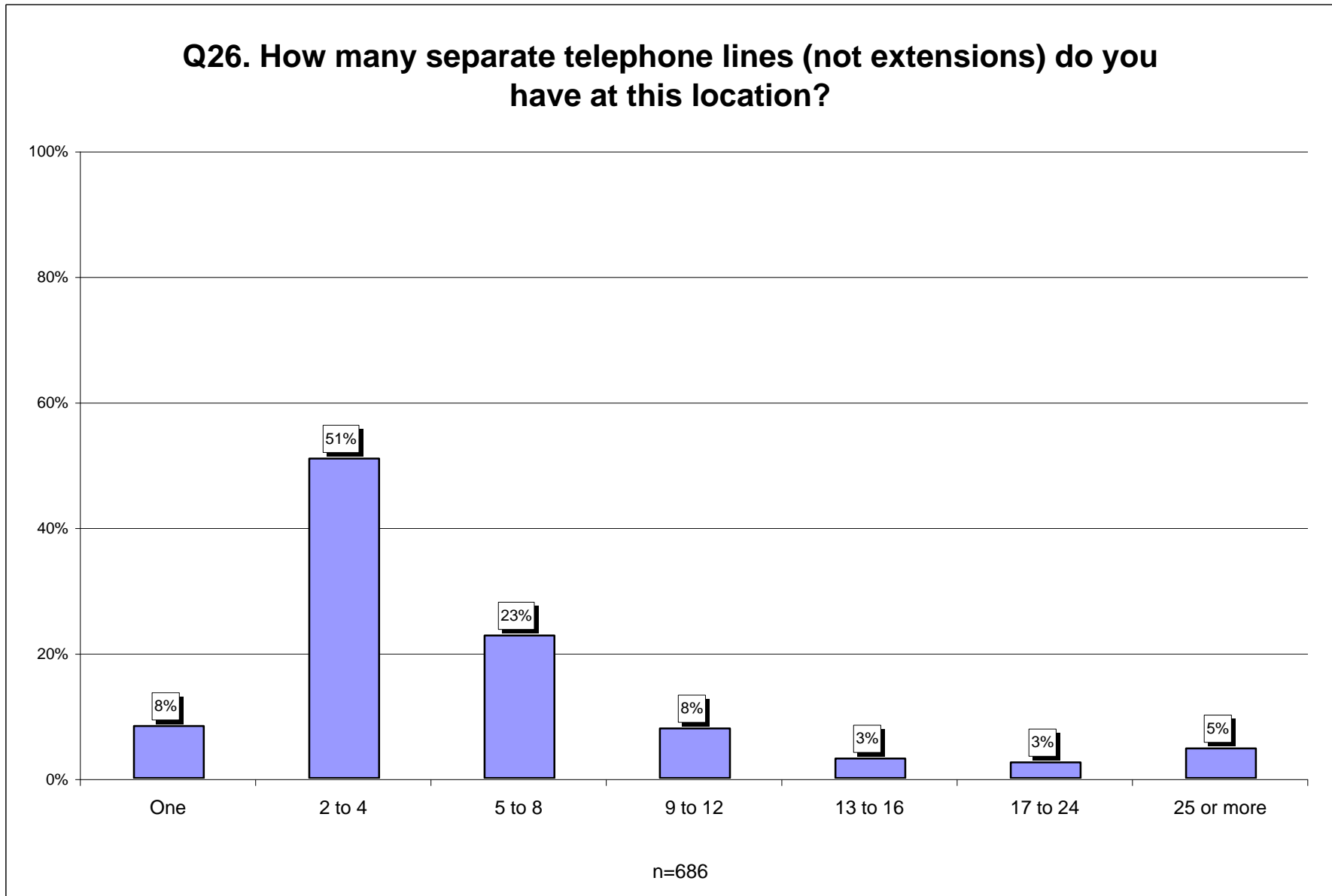




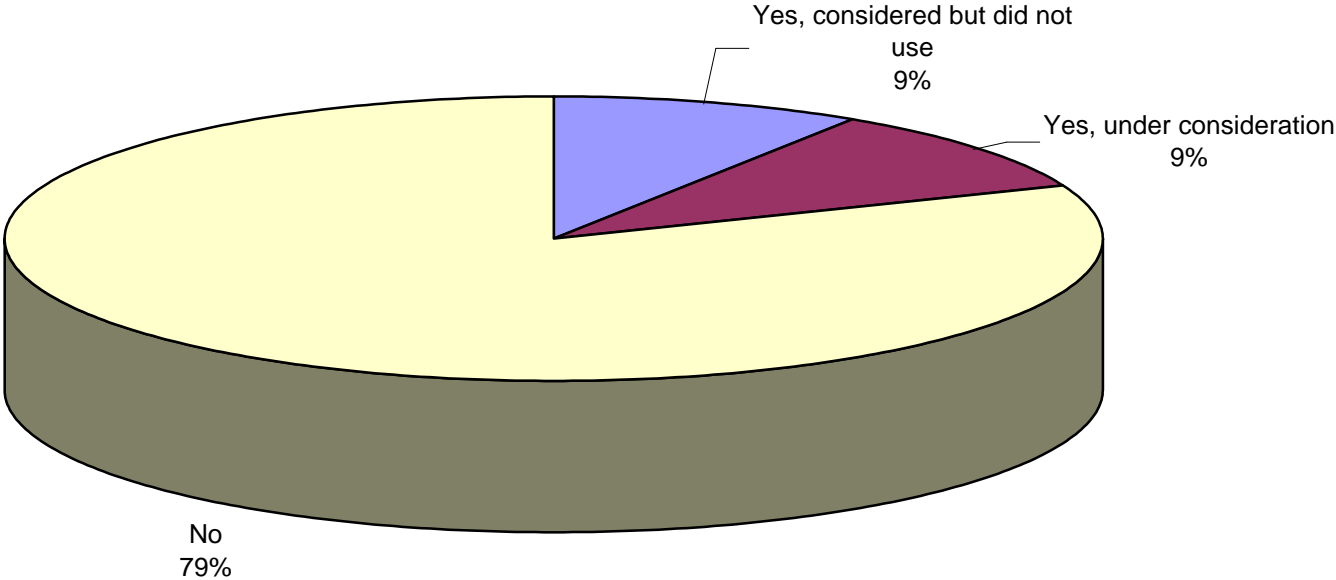
Q25. If high-speed connections were available to employees from home, would your organization allow telecommuting?



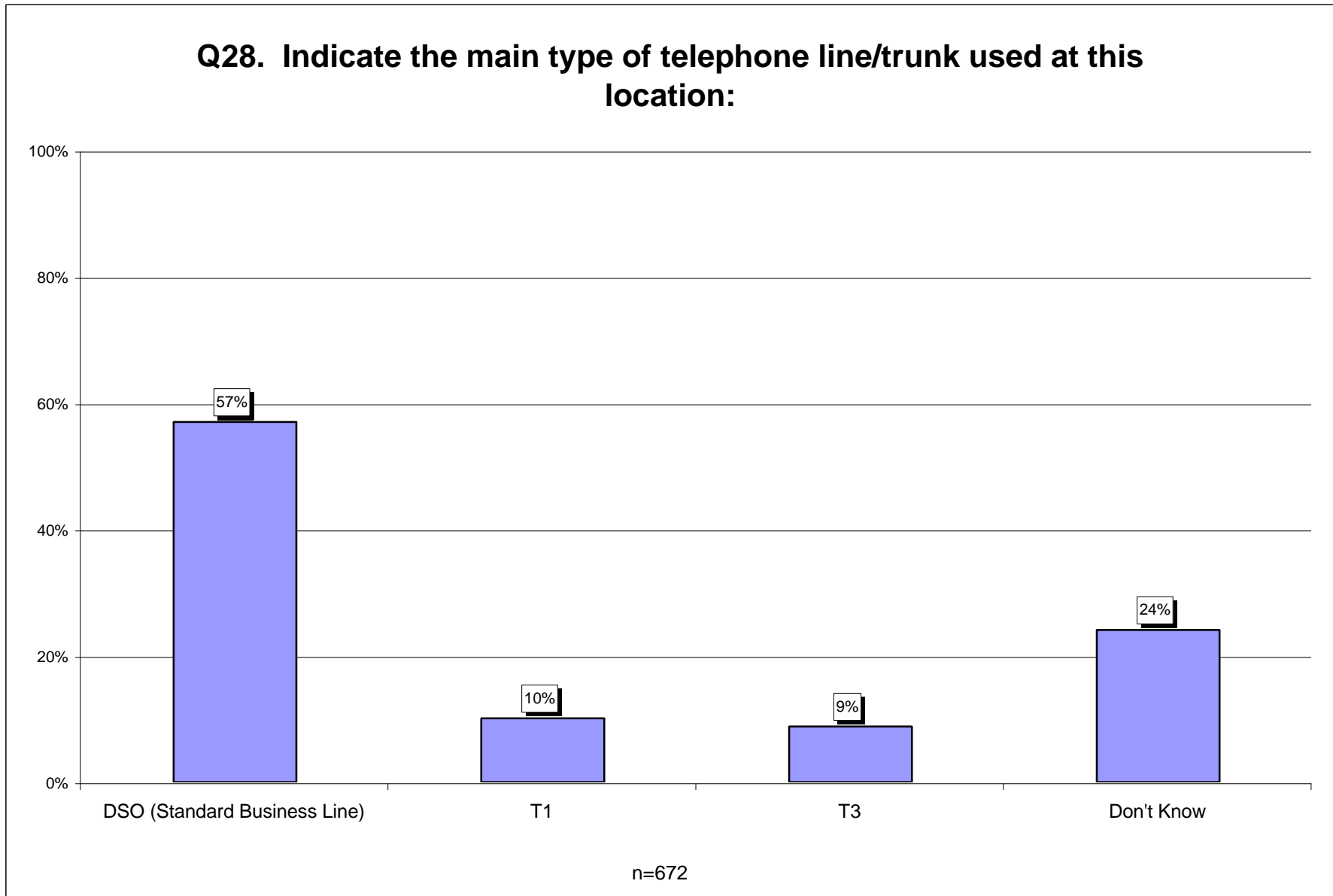
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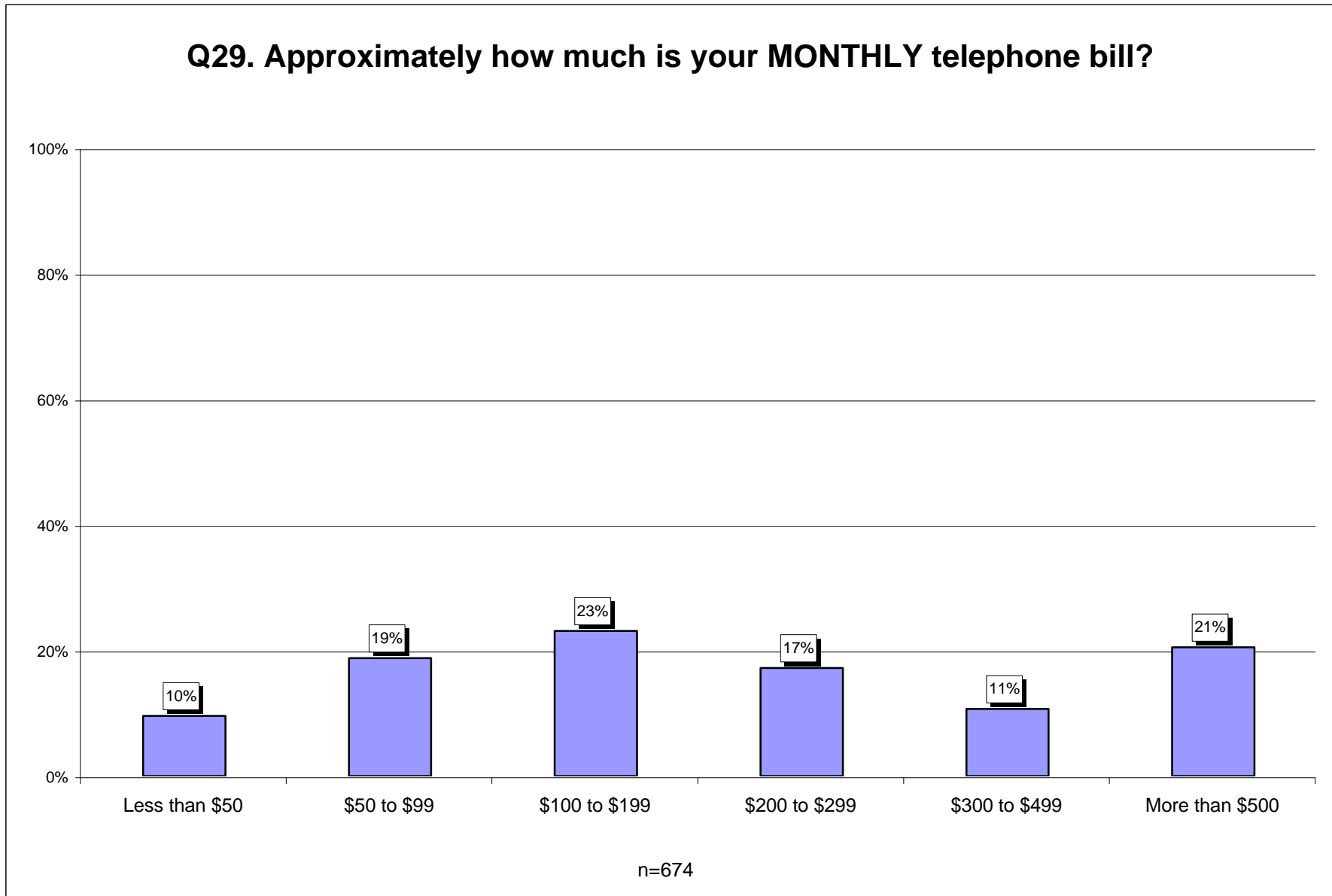


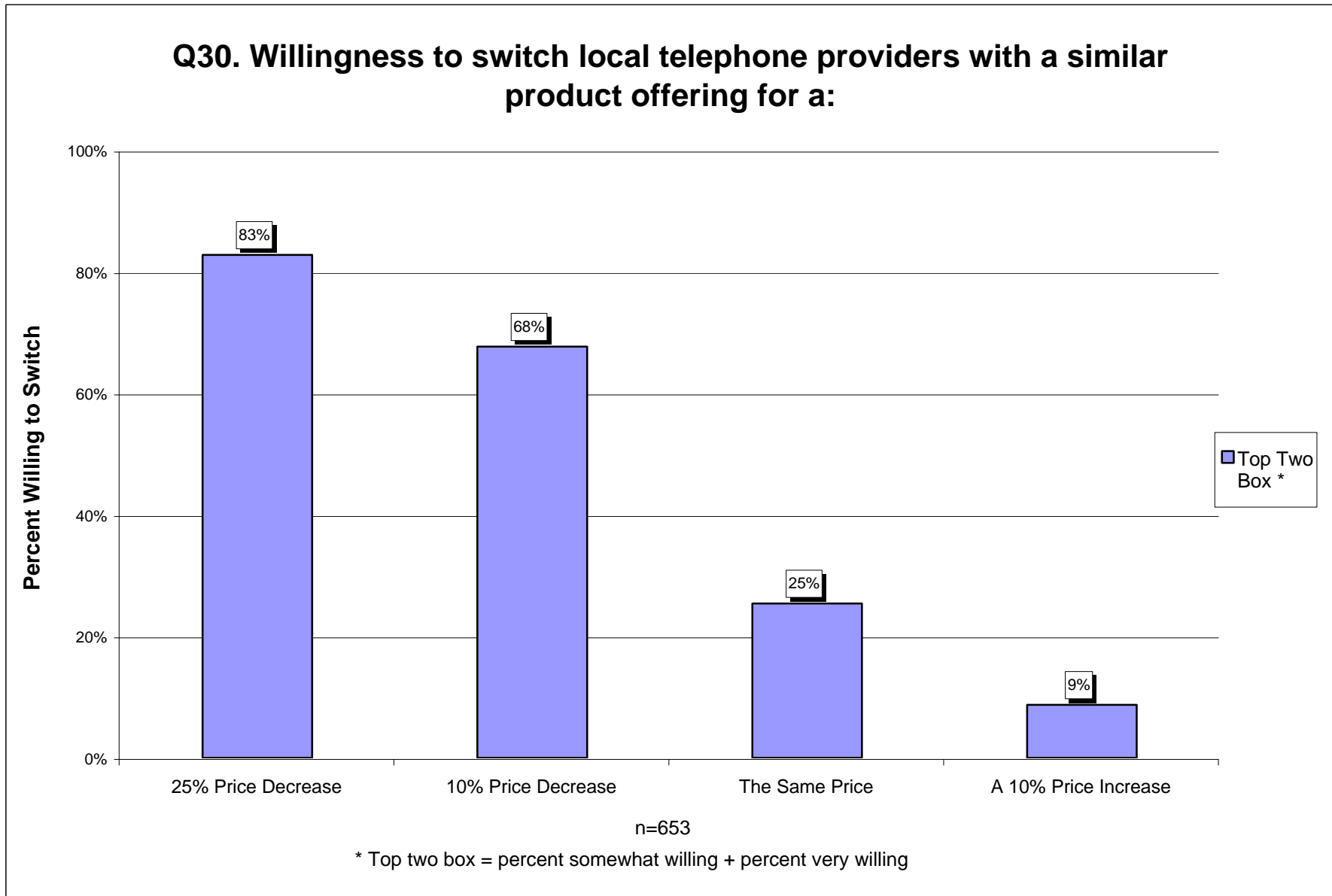
Q27. Have you considered using a VoIP (Voice over Internet Protocol) telephone service?



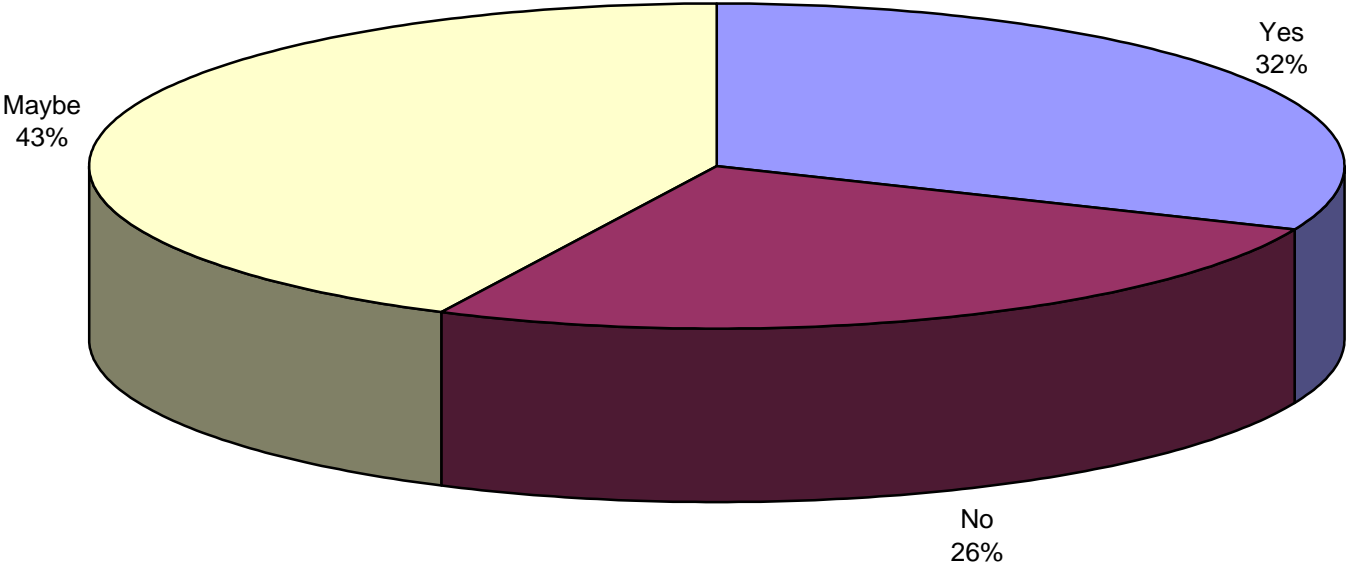
n=678





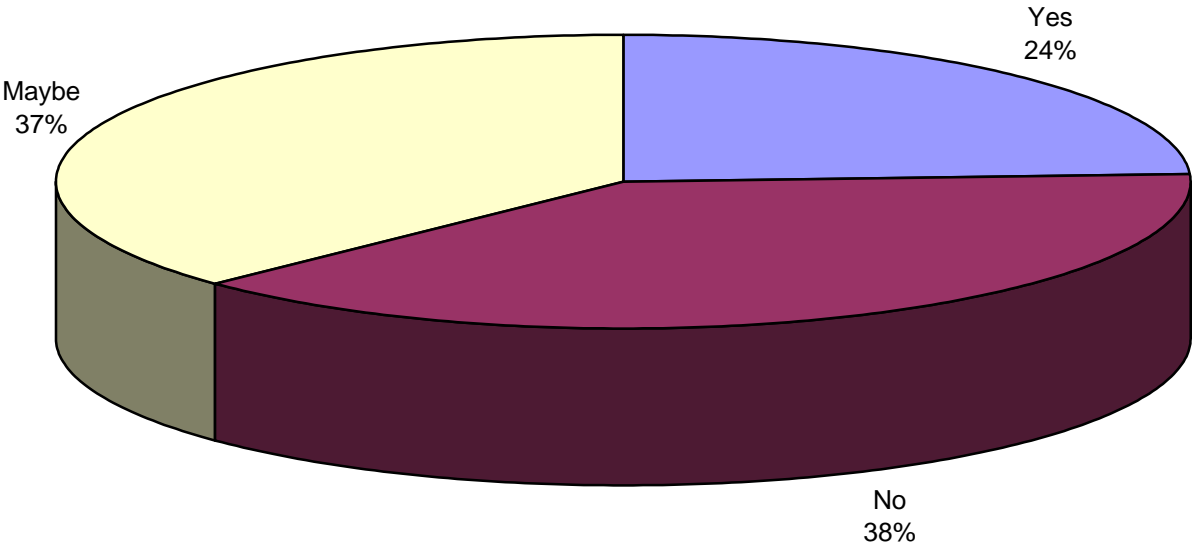


Q31. Are you interested in a fiber optic interconnection within your community?



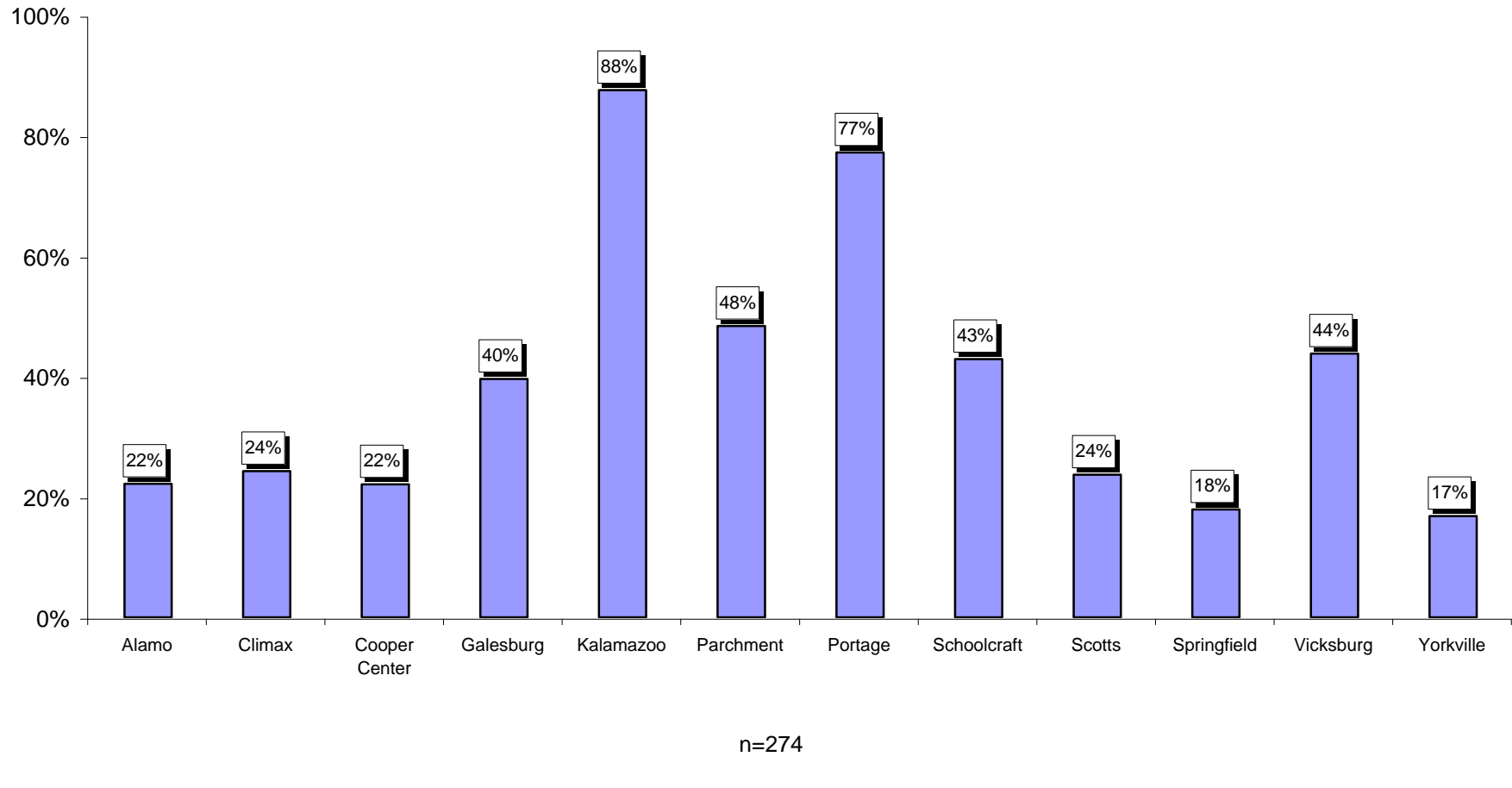
n=686

Q32. Are you interested in a fiber optic interconnection with other communities in Kalamazoo County?

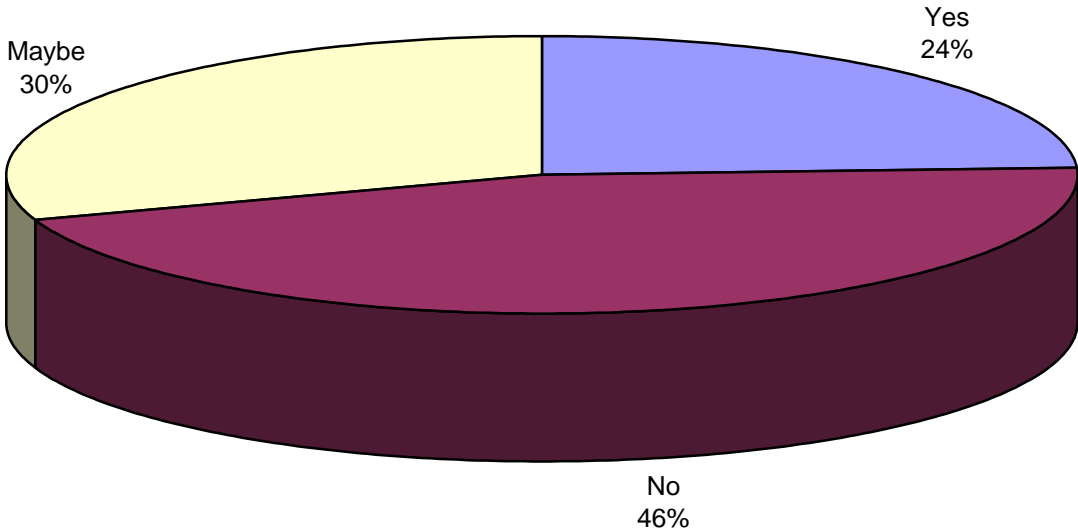


n=678

Q33. With which communities in Kalamazoo County are you interested in a fiber optic interconnection?

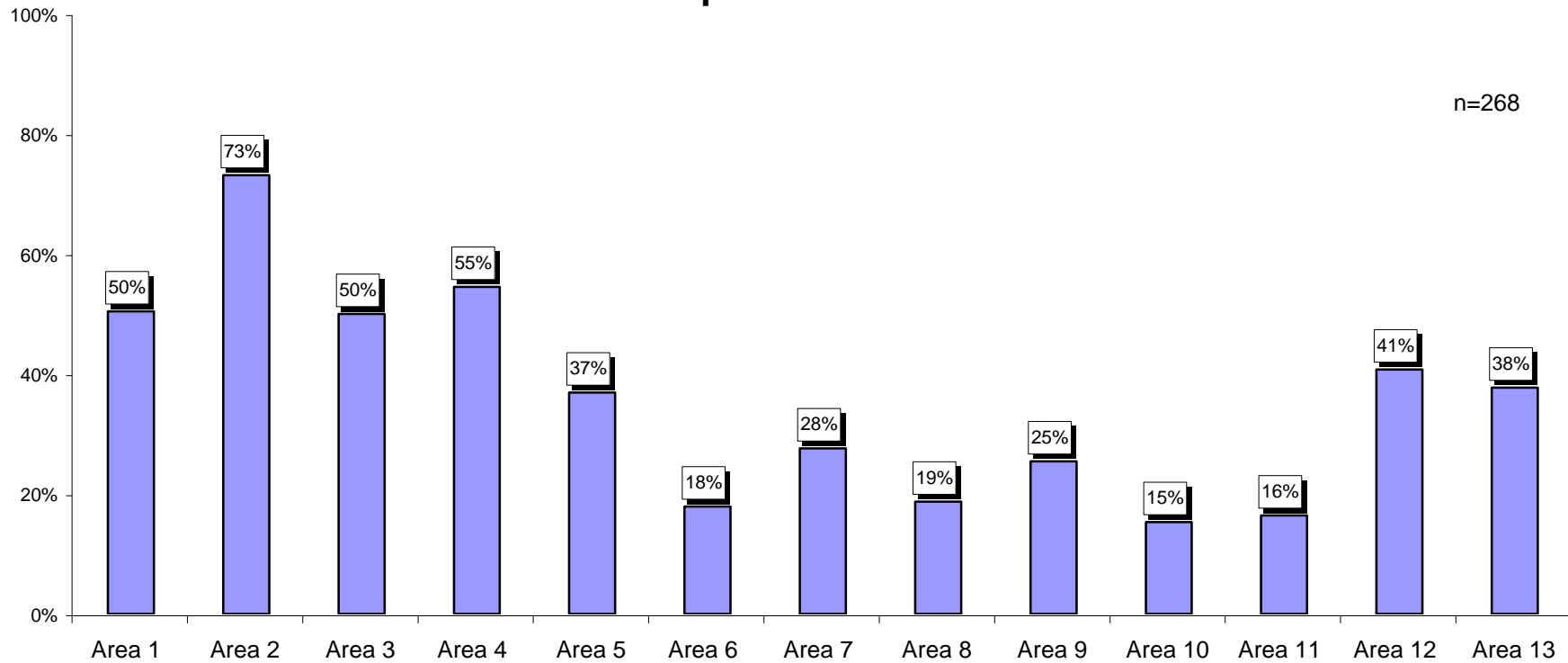


Q34. Are you interested in a fiber optic interconnection with other communities outside of Kalamazoo County?



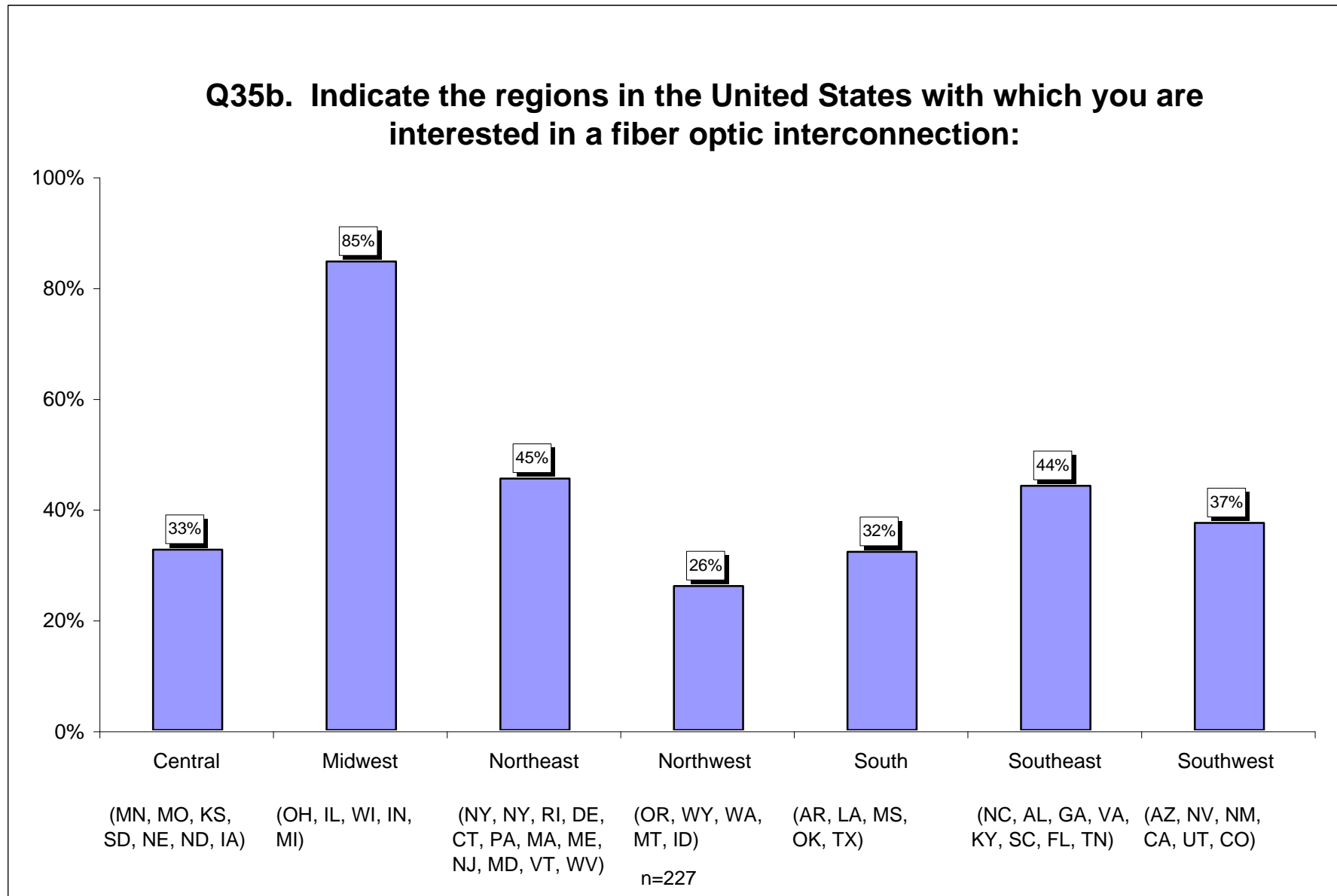
n=669

Q35a. Indicate the regions of Michigan with which you are interested in a fiber optic interconnection:

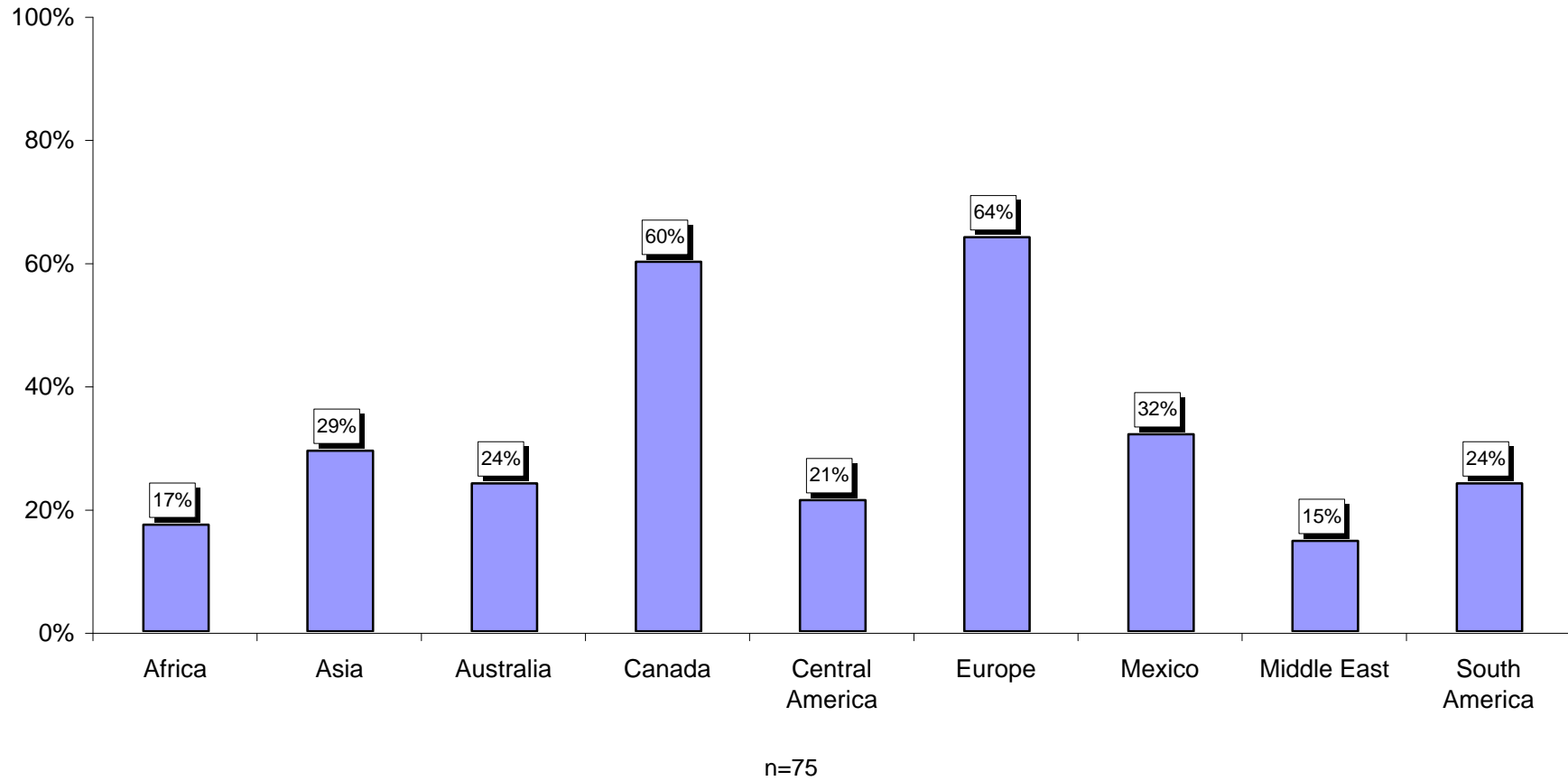


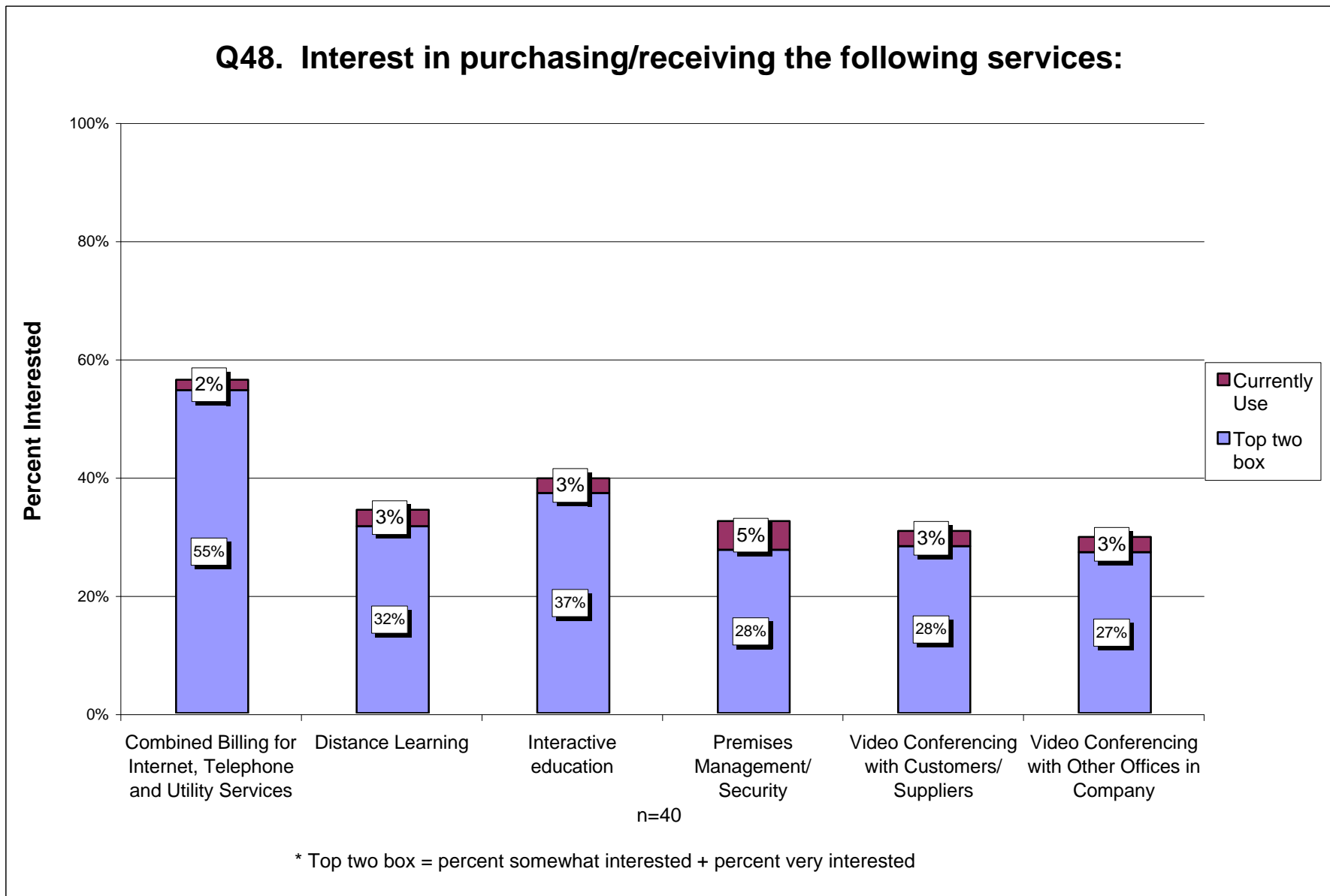
Area 1 (Berrien, Van Buren, Cass)
Area 2 (Allegan, Kalamazoo, St. Joseph)
Area 3 (Calhoun, Branch, Hillsdale, Jackson, Lenawee)
Area 4 (Kent, Ottawa, Muskegon, Ionia, Barry)
Area 5 (Genesee, Shiawassee, Macomb, Oakland, Livingston, Washtenaw, Wayne, Monroe)
Area 6 (Huron, Tuscola, Lapeer, Sanilac, St. Clair)
Area 7 (Clare, Osceola, Mecosta, Montcalm, Isabella, Gratiot, Clinton, Ingham, Eaton)

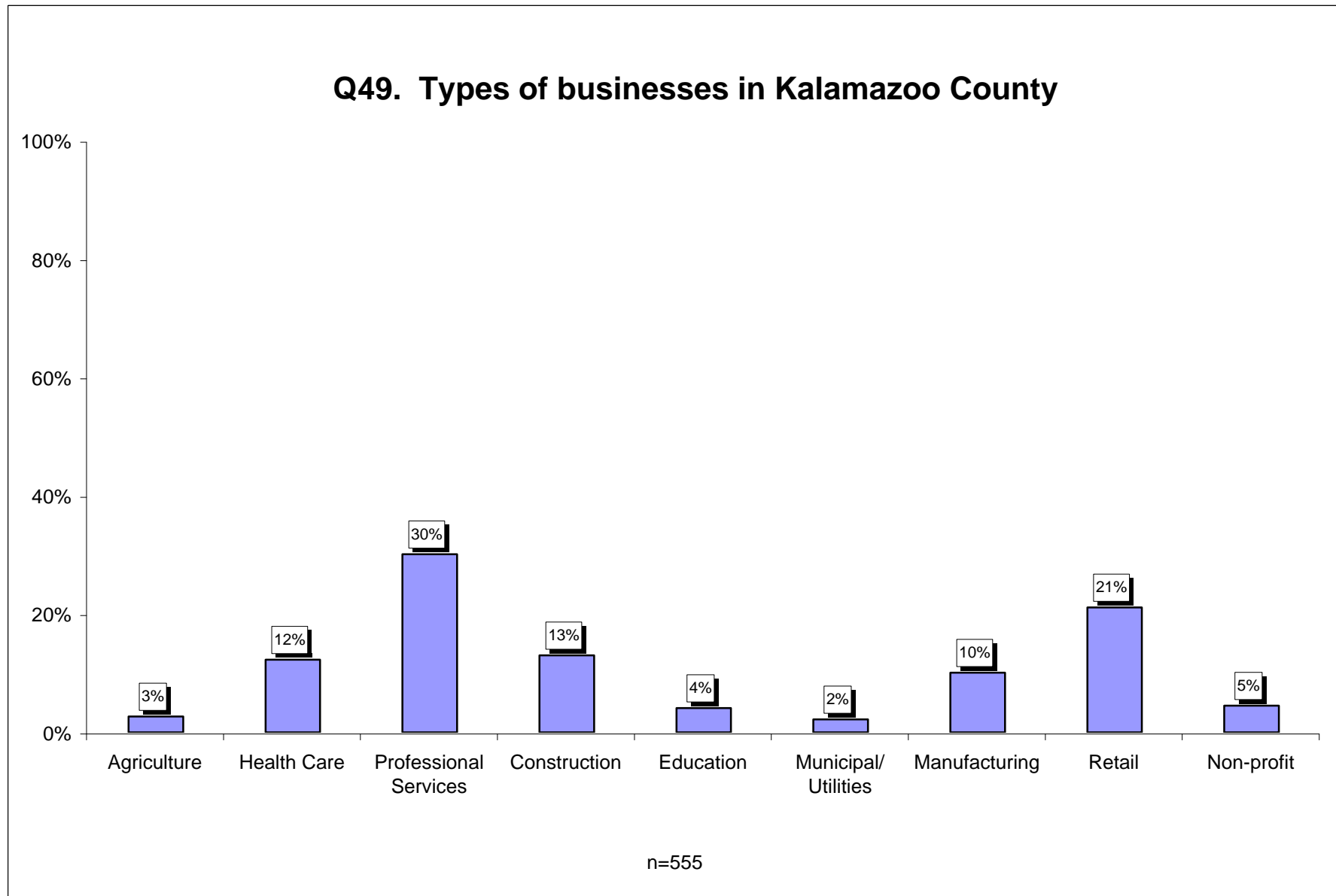
Area 8 (Bay, Gladwin, Midland, Arenac, Saginaw)
Area 9 (Grand Traverse, Leelanau, Manistee, Benzie, Mason, Oceana, Wexford, Lake, Newaygo)
Area 10 (Char., Emm., Cheb., Prs. Is., Mont., Ots., Ant., Kalk., Craw., Osc., Alp., Alc., Oge., Ros.)
Area 11 (Upper Peninsula of Michigan)
Area 12 (Gary/Chicago Area)
Area 13 (N. Indiana and N. Ohio Area)



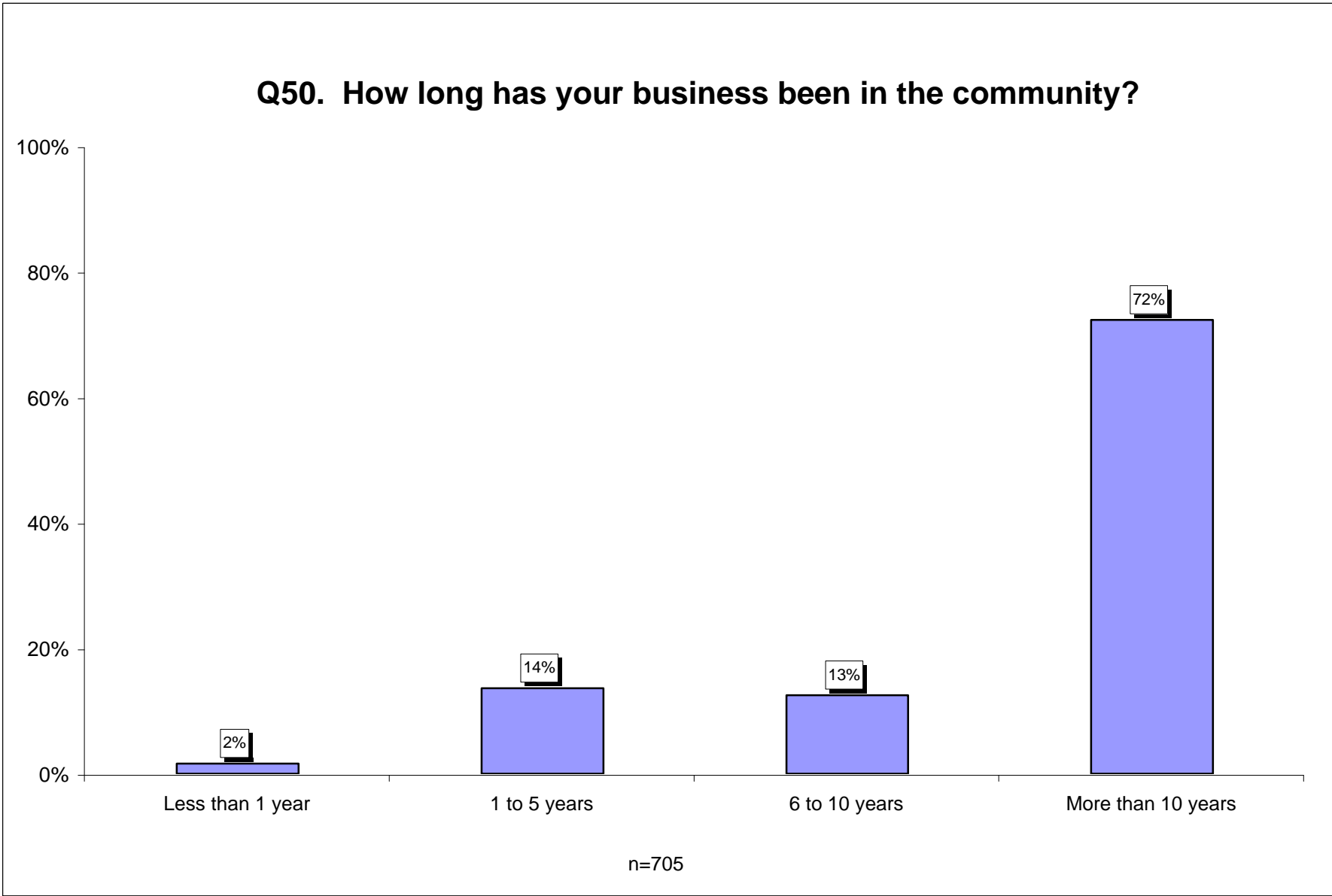
Q35c. Indicate the International Regions with which you are interested in a fiber optic interconnection:

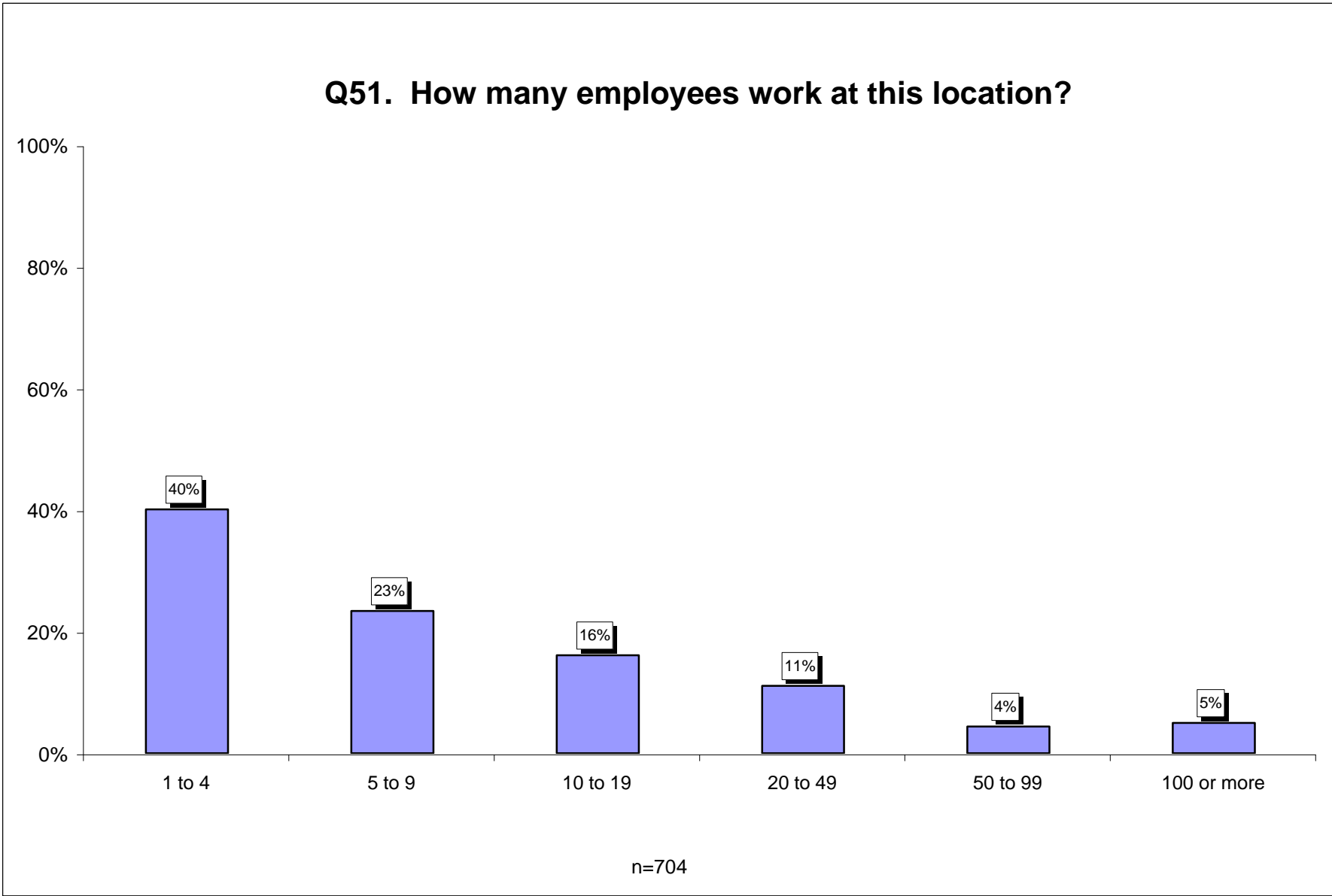




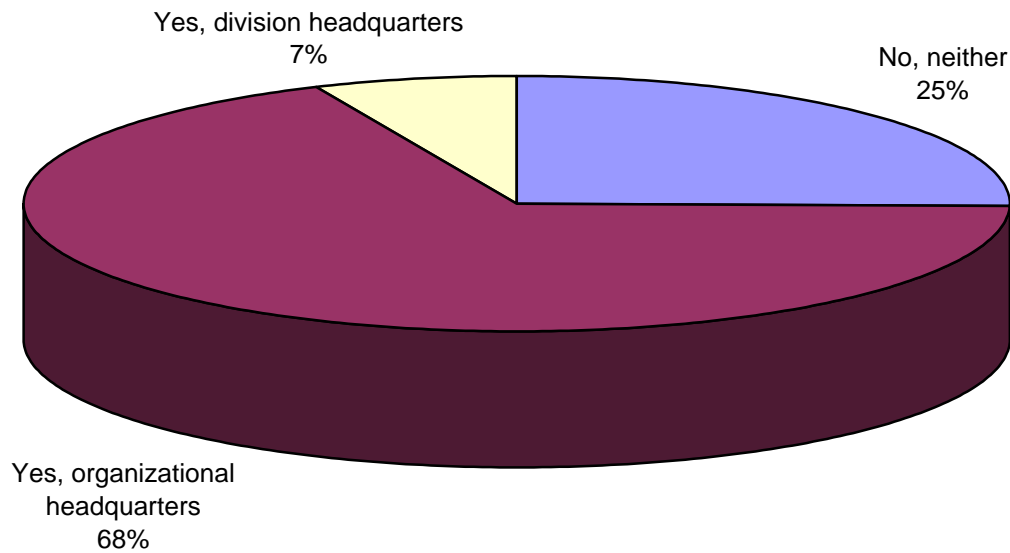


Business Type Breakdown	
Agriculture	Agriculture, forestry, fishing, hunting or mining
Health Care	Health care and social services
Professional Services	Arts, entertainment, recreation, accommodations and food service Finance, insurance, real estate, rental or leasing Information Professional, scientific, management, administrative and waste management Telemarketing Tourism Transportation and warehousing Wholesale trade
Construction	Construction
Education	Education
Municipal/Utilities	Public administration Utilities
Manufacturing	Manufacturing
Retail	Retail trade
Non-profit	Religious institution



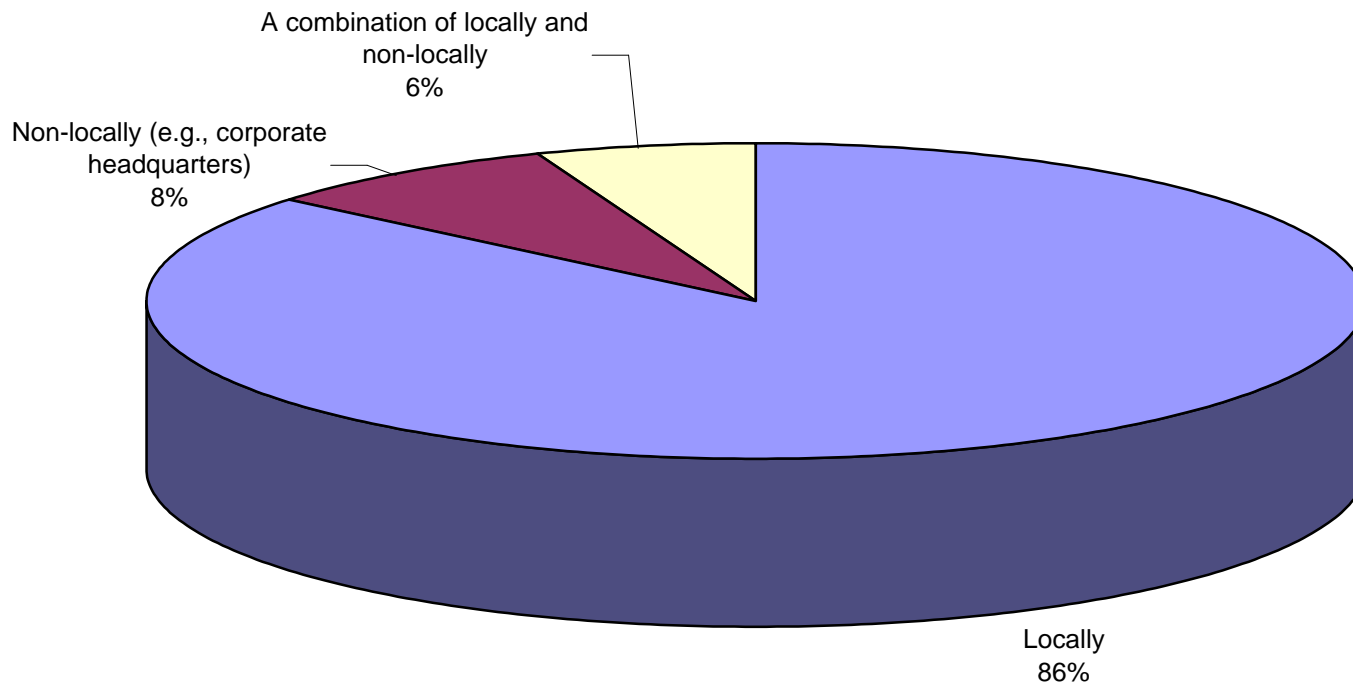


Q52. Is this the organization's headquarters or division headquarters?



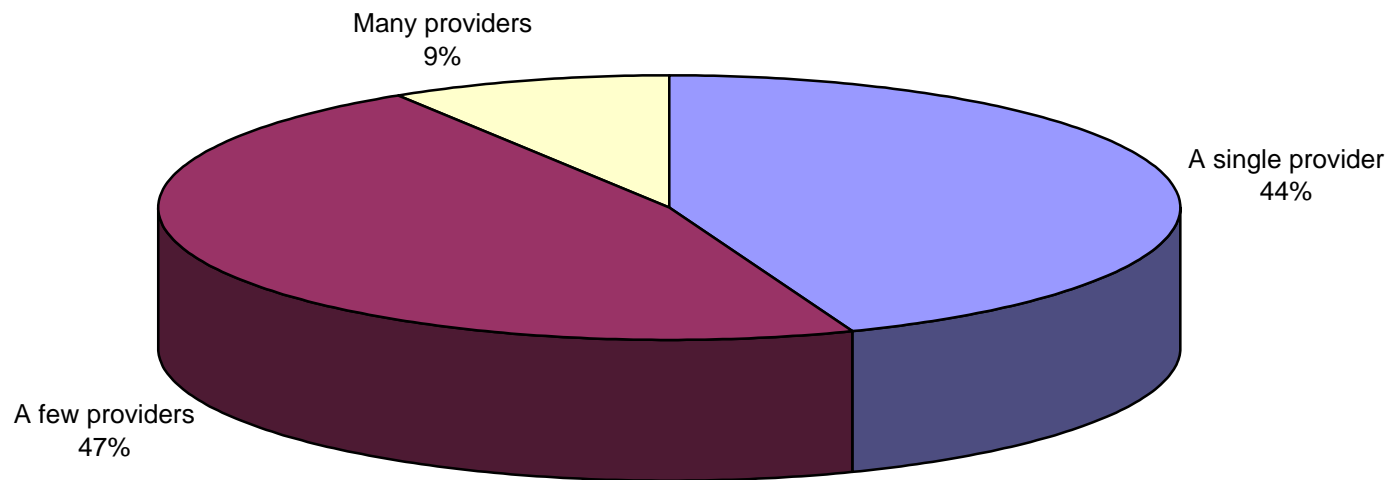
n=683

Q53. Where are telecommunication decisions made in this organization?

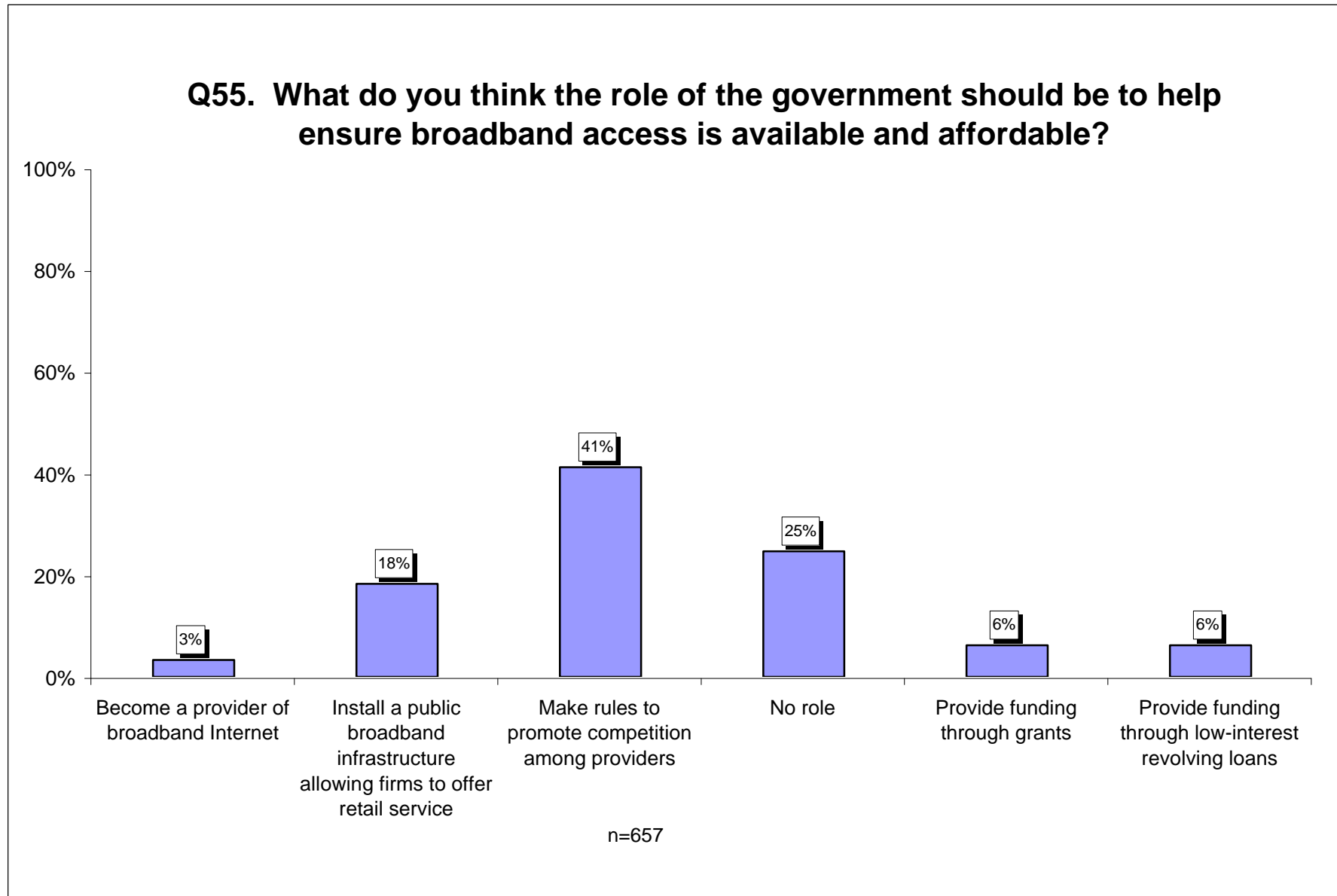


n=704

Q54. Which market structure will best supply your Internet and other communication services?



n=668



Kalamazoo County

Business Survey Summary

Section 3:

Business Survey Cross Tabulations

Kalamazoo County

Business Survey

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