Agriculture (5)

- Due to the remote location of most farms, last mile wireline infrastructure seems cost prohibitive, so a wireless signal seems to be the common want or need.
- Speed is a concern because they need real time access to weather reports.
- Being able to track sale prices of products (beef, corn, propane, etc.).
- Researching diseases or other problems that might occur (education).
- Shopping for new equipment or replacement parts for machinery.
- Being able to sell products (leather, wool, etc.) using higher resolution pictures.
- Meets minimum standards – 100% No
    - All of the Lake area is problematic.
    - Wireless signals are weak.
    - Brumley is without internet availability.
- Cost Prohibitive – 40% Yes 60% Don't Know
    - Cost prohibitive compared to what people pay in the City.
    - If system is available to enough users the cost can be shared.
- Importance of Broadband (availability and adoption) – 100% Very Important
    - Careers in agriculture will be extinct without it.

Business and Professional Services (37)

- Some business owners are able to pay a higher rate ($600/mo) in order to get high speed internet. If that is the case, then how are others not afforded the same option if they are along the same route?
- Need high speed to complete webinars, send tax information to the government, sales transactions.
- Not only is the download speed important, but the upload speed as well. Some businesses require sending large video or image files.
- Being able to have websites locally hosted to update content, and to be accessed readily by customers.
- Majority are trained to use broadband technologies within this sector, and ALL are promoting their business partners to utilize the service.
- Online News outlets rely completely on the availability of high speed internet. The number of customers is limited by the amount of people who have access to high speed internet.
- Need to process information quicker and more efficiently.
- Most organizations indicate that they do not have access to the speed/quality of service for internet that is needed to support their business.
- Monthly bill savings can be instrumental in the success or failure of some smaller businesses. Being able to do business online affordably is key to that success.
- Meets minimum standards – 42% Yes 58% No
    - Age of the phone and cable TV lines is problem.
    - Cannot work from home so I am limited during snow events (which is my busy season).
    - Osage Beach is not covered in its entirety.
    - Service is available just down the road but cost quoted to receive is exorbitant.
- Cost Prohibitive – 13% Yes 35% No 52% Don't know
    - Cost for business connections is five to six times higher than residential, very expensive for a limited amount of use.
    - Needs to be available to more people to share the cost.

- Importance of Broadband (availability and adoption) – 87% Very Important, 7% Important, 6% Somewhat Important
    - Broadband service is vital to every Missourian.
    - I need it every day.
    - It is essential.
    - If Central Missouri does not catch up with technology, the current economic downturn will be viewed as more of the norm.
    - I'm at a competitive disadvantage with the price I have to pay, the speeds I get, and the data restrictions I must abide by.

Community and Social Services Sector (8)

- Requests for wireless solutions because of the remote location of volunteers who need to communicate with Museums
- Educational needs such as video conferencing (skype)
- Email is PRIMARY means of communication for some advisers (SCORE)
- Encourages business practices to go online.
- Meets minimum standards – 60% Yes 40% No
    - Broadband needs to be available to volunteers at their homes.
    - Problematic along Highway 54 between Camdenton and Osage Beach.
- Cost Prohibitive – 17% Yes 33% No 50% Don't Know
    - Not at this point, but could be as the demand for bandwidth grows.
    - What about competition?
- Importance of Broadband (availability and adoption) – 50% Very Important, 33% Important, 17% Somewhat Important
    - It needs to be at our locations in rural areas that currently don't have high-speed access.
    - Would open up opportunities to serve our community and our members better.

Economic Development (2)

- "Last Mile" needs in this area are more likely achieved with wireless (wifi or other solutions).
- High speed would open up the opportunity for home based businesses to start up; thus would drive economic development.
- Meets minimum standards – 100% No
    - Many people speak of their lack of service.
    - Broadband is in the City of Lebanon, not in the rest of the County.
- Cost Prohibitive – 50% No 50% Don't Know
- Importance of Broadband (availability and adoption) – 100% Very Important
    - Needed to be able to compete with everyone else.
    - Very difficult to live without it.

Energy (5)

- Ability to use Smart Grid Technology is important in this sector.
- Internet/phone/TV bundling to offer economic development incentives to growing technology businesses in area.
- Encourage business practices to go online.
- Meets minimum standards – 33% Yes 67% No
    - Efficient, reliable, broadband internet access is needed.
- Cost Prohibitive – 33% Yes 33% No 34% Don't Know
    - Cost and availability inhibit the utilization of broadband technology by small businesses and residential customers.
- Importance of Broadband (availability and adoption) – 100% Very Important
    - Absolutely vital to the continued growth of the region.
- There is a comprehensive fiber to the home project in motion. Challenges include funding, risk mitigation and member participation.

Environment (3)

- Environmental engineers need access to clients via email.
- Researching new permitting processes and regulations found online.
- Would use video conferencing if the service was available.
- Encourages business practices to go online.
- Meets minimum standards – 100% Yes
- Cost Prohibitive – 50% Yes 50% No
    - There are several companies that offer broadband or Internet services at varying pricing and speeds. It would be nice to have them to be more competitive in pricing.
- Importance of Broadband (availability and adoption) – 50% Very Important, 50% Important

Healthcare (4)

- Billing and payment services are crucial to the operation, and being able to do that online is a must.
- Communication with rural locations for physicians to have access to data located in larger metro locations.
- Hardware, software and other tools are available, but are expensive.
- Lack of competition seems to be a common concern as to why prices are so high.
- Electronic health records will be soon required by medicare, and will need to have access in smaller communities.
- Inability to remotely access electronic health records from home is a critical problem around the Lake of the Ozarks.
- Meets minimum standards – 50% Yes 50% No
    - Biggest problem areas include Mack's Creek and the far western area of Camden County, as well as Iberia.
- Cost Prohibitive – 100% No
    - Need to see more options in speeds, pricing, service offerings, etc.
- Importance of Broadband (availability and adoption) – 100% Very Important

Higher Education (2)

- Secondary schools have the ability to provide online courses and services, but students living in most parts of the Lake area are unable to connect to them due to the restrictions stemming from lack of service.
- Students doing research for papers can easily be done on campus (over 70 computers available online, plus wifi for laptop users) but cannot get the same service at home, which is a large part of the population for both institutions.
- Unable to compete with larger universities or institutions in urban setting due to lack of online services.
- Meets minimum standards – 50% Yes 50% No
    - The entire Lake area has minimal coverage, as well as surrounding rural areas.
    - College's computers have broadband capability and there is a wireless campus network.
- Cost Prohibitive – 50% No 50% Don't Know
- Importance of Broadband (availability and adoption) – 100% Very Important
    - Quality broadband access is the key to any college institution to remain credible and for its students to be successful.

Industrial and Manufacturing (8)

- Boat dock manufacturing (large business in area) needs access to online maps (GIS) for permitting process through Ameren UE.
- Sales for docks are 95% online. Inability to provide fast response to online inquiries can result in loss of business.
- Monthly bill savings can be instrumental in the success or failure of some smaller businesses. Being able to do business online affordably is key to that success.
- Meets minimum standards – 25% Yes 75% No
    - Need high-speed access instead of dial-up.
    - Currently trying to get a higher speed connection which would save over $300 a month.
- Cost Prohibitive – 50% Yes 25% No 25% Don't Know
- Importance of Broadband (availability and adoption) – 75% Very Important, 25% Don't Know
    - Myriad reasons that faster communication can benefit manufacturing (sending diagrams, charts, photos, uploading portfolios, sample drawings, etc. from prospective employees, etc.)
- Unemployment in the area is 15+%. How can we be competitive when we are lagging in the most fundamental areas of infrastructure?

K-12 Education (21)

- Parent/teacher communication, student/teacher communication is vital and requires the use of high speed internet.
- Teachers require high speed internet for grading software. This makes them more efficient, but requires it to be available at home as well as work.
- Certain DESE (Department of Elementary and Secondary Education) requirements are not met due to lack of internet.
- Use of PCs, projectors and smartboards allow teachers to better do their job.
- Meets minimum standards – 80% Yes 50% No
    - District campus WAN and other connections are capable of delivering content to students and educators successfully
    - Needed at all of our school buildings.
- Cost Prohibitive – 9% Yes 18% No 73% Don't Know
    - Limited choice of broadband providers does not promote competition and help drive costs down.
- Importance of Broadband (availability and adoption) – 91% Very Important, 9% Don't Know
    - Cost effective broadband is vital.
    - In order to compete at a global scale our students must use these tools.
    - The internet has so much to offer educators.

Library (5)

- Cataloging, circulating, and organizing all kinds of media including books, music and movies requires the need for high speed internet.

- Camden, Laclede, and Miller use the Internet for all their basic functions. Laclede and Camden belong to a consortium of libraries that share an automation system that has the servicer located in the Springfield-Greene Library Center. We use the Internet to check materials in and out, to catalog library materials so that they are visible to our patrons through our online public access catalog. Library users can see what is not only at the library branch they are visiting but also what the other libraries own. The can do this in the comfort of their own homes if they have Internet access. Camden County and Laclede County have electronic books for users to download and Heartland is about to offer these services to their patrons. Morgan County has a self contained automation system and has dial up service. Morgan County says it only has 9 computers and has only one library building. Camden County has over 130 networked computers and printers with six branch libraries. Lebanon/Laclede has only one building but numerous computers and networked printers.

- Camden, Laclede and Heartland also have electronic reference materials that library users can access at the libraries and also from their home computers. Library districts purchase these materials to meet the needs of their clientele.

- Libraries are now offering wireless connection for patrons who bring their laptop computers to access the Internet. This is a great service but if not monitored carefully they can use too much of the broadband and slow our automation system severely. MORENET who works with school and public libraries helps us monitor our use and lets us know when it is used consistently enough for us to need the next level of broadband capacity. Camden County Library District has fiber optics for Camdenton, a T-3 for Osage Beach, and T-1s for Sunrise Beach, Mack's Creek, Stoutland, and Climax Springs branches.

Broadband Survey Results By Sector

- The main concern for all libraries is the cost of the services we now offer and the new cost of additional electronic needs that are coming in the future.

- Printed materials are becoming more and more costly and individuals are requesting that the information they want to be the latest most up-to-date and they want it now. Morgan County has reduced their services because of the cost of broadband use.

- As the cost of materials, equipment, and broadband, many libraries are joining together with resources to be able to provide the best services for their users. Laclede, Heartland, and Camden have joined with 18 more library systems to provide a collection of e-books for library users. Instead of each library purchasing its own collection, we combine our monies to provide a larger collection for all our users.

- Camden and Laclede joined a consortium of public, academic and special libraries to purchase a more sophisticated and robust automation system to provide a more user friendly product for our library users.

- Automation systems are going to need more and greater speeds to run. More and more of our materials are downloadable, music, e-books, newspapers, magazines, and reference materials. We see libraries as access points instead of material warehouses as in the past. In order for the regional libraries to succeed, affordable Internet access is essential.

- Affordable broadband capacity is number one on all libraries' lists of priorities. The State Library has a task force committee concern affordable automation systems and broadband capacity. Librarians petition legislators concerning broadband for all libraries not just the big city libraries. If not available for rural area libraries many would just close their doors.

- Libraries provide service to both the wealthy and the poor. Libraries need equal footing with the urban libraries that have choices of providers.

- Meets minimum standards – Yes
    - Because of MOREnet.

- Cost Prohibitive – Don't Know
    - If the cost went up too much we would have to evaluate whether we could keep current connections.

- Importance of Broadband (availability and adoption) – 100% Very Important
    - Libraries are access points for information and more and more of that information is electronic.

Local Government (6)

- GIS services (online mapping of information) require high speed internet.
- Receiving/routing information (public safety, jail, courts, assessments and collections, recordings) all require high speed internet.
- Higher visibility of government documents will reduce redundancy, creating a more efficient system.
- Most federal and state applications and reporting require internet uploads.
- Encourage government practices to go online.
- Meets minimum standards – 100% No
    - Venture a few miles from any city limits boundary within the County and most residents have outdated dial-up service.
    - Satellite is expensive and underperforming.
    - Wireless internet coverage is shaky.
- Cost Prohibitive – 67% Yes 33% No
    - Government grants would be helpful
- Importance of Broadband (availability and adoption) – 100% Important
    - Allows government employees more time to dedicate to existing workflow and additional services.
    - Citizens are better informed.
    - Rural areas need the same technology as urban areas to compete.

Public Safety (2)

- Gathering knowledge of weather conditions can help local law enforcement both on the water and land.
- Encourage government practices to go online.
- Sending and receiving large files from remote offices or command centers is a priority.
- Linking communication points to enhance coverage of communication systems for radio/data.
- Research via internet during investigations.
- Meets minimum standards – 100% Yes
- Cost Prohibitive – 100% No
- Importance of Broadband (availability and adoption) – 100% Very Important/Important
    - Broadband needs to be more affordable to get more people to sign up for it.

Tourism (12)

- Rely on dial-up, DSL or in limited areas, Charter Communications (high speed cable).
- Most organizations indicate that they do not have access to the speed/quality of service for internet that is needed to support their business.
- POS systems need high speed internet to operate properly (hotels printing boarding passes, etc.)
- Meets minimum standards – 44% Yes 56% No
    - Minimum only at this time.
    - We need higher bandwidth at an affordable price.
    - There is no broadband in Lake of the Ozarks State Park and rural areas around Camdenton.
- Cost Prohibitive – 22% Yes 22% No 56% Don't Know
    - Costs go up quickly for larger bandwidth.
- Importance of Broadband (availability and adoption) – 67% Very Important, 11% Important, 22% Somewhat Important
    - Everyone who stays here wants WiFi.
    - Guests would rather video chat with their mobile devices and computers.
    - Corporate guests want a mobile office.
    - The absence of broadband here turns away many of the younger tech-savvy visitors.

Workforce Development – Ozark Advertising Specialties

- Need to send photos online of high quality is very important.
- Intercompany communications is important via email.
- Education and training can be done online.
- Encourages business processes to go online.
- Meets minimum standards – No
    - Way too slow in this area.
- Cost Prohibitive – No
- Importance of Broadband (availability and adoption) – Very Important
    - This vocation almost demands it.