



**Connect Ohio<sup>®</sup>**  
**2009 Business Technology**  
**Assessment**

**June 2009**

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## Key Findings: June 2009

### Key Technology Benchmarks, June 2009

Businesses that use a computer:	75% (down from 82% in 2008)
Businesses that use the Internet:	64% (down from 66% in 2008)
Businesses with broadband service:	59% (unchanged from 2008)

### Other Key Findings

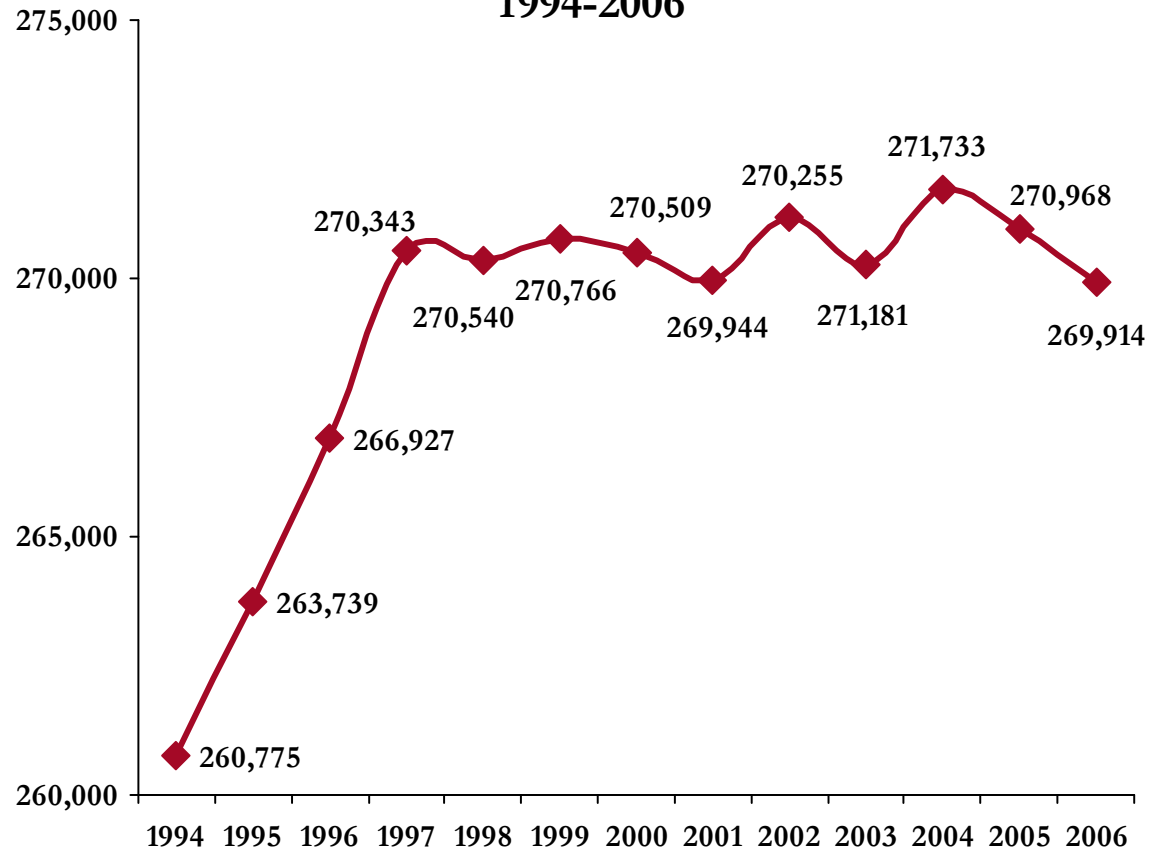
- In 2009, 75% of Ohio businesses reported that they use computers for their business functions, compared to 82% in 2008. This, in part, reflects the difficult economic times experienced statewide in the past year, with quickly growing unemployment rates and declines in several leading economic indicators.
- While Internet adoption overall decreased slightly from 2008 to 2009, the number of businesses that rely on dial-up Internet service dropped from 4% to 1% during this time period.
- Broadband growth among all Ohio businesses remained unchanged at 59% over the past year; among computer-using businesses, though, there was an 8% jump in broadband adoption among Ohio businesses, suggesting that the drop in business computer use may have slowed the growth of broadband adoption.
- More than four out of five businesses with no broadband service do not have any Internet service at all, or they do not use a computer for their business.

## Key Findings: June 2009 *(Continued)*

- Download speeds among businesses that knew their approximate bandwidth increased over the past year from 2.8 Mbps to 4.7 Mbps.
- The lack of a computer continues to be the top barrier to broadband adoption among Ohio businesses that do not subscribe to broadband, followed by the belief that the business does not need broadband.
- Despite the difficult economic times over the past year, the median revenue among broadband-connected businesses grew twice as fast as those that do not use broadband; businesses that use broadband make on average \$300,000 more than the statewide average.
- The share of Internet-connected businesses that use state government websites increased slightly over the past year; the most popular application used at state websites continues to be downloading and filling out online forms/applications.
- Nearly one-fifth of all Ohio businesses allow their employees to telework. Teleworking is most prevalent in the High Tech industry sector, where nearly one-half (45%) of businesses allow employees to telework.

# Growth in Business Establishments

**Ohio Business Establishments  
1994-2006**



Source: U.S. Bureau of the Census, 2006 County Business Patterns

According to 2006 U.S. Census County Business Patterns data (the most recent data available), there were 269,914 business establishments in Ohio, down 0.4% from 270,968 in 2005.

These businesses employed over 4.8 million individuals in 2006.

The average establishment employs 17.9 workers, well above the national average. Conversely, average real wages in Ohio (\$36,488) fall below the national average.

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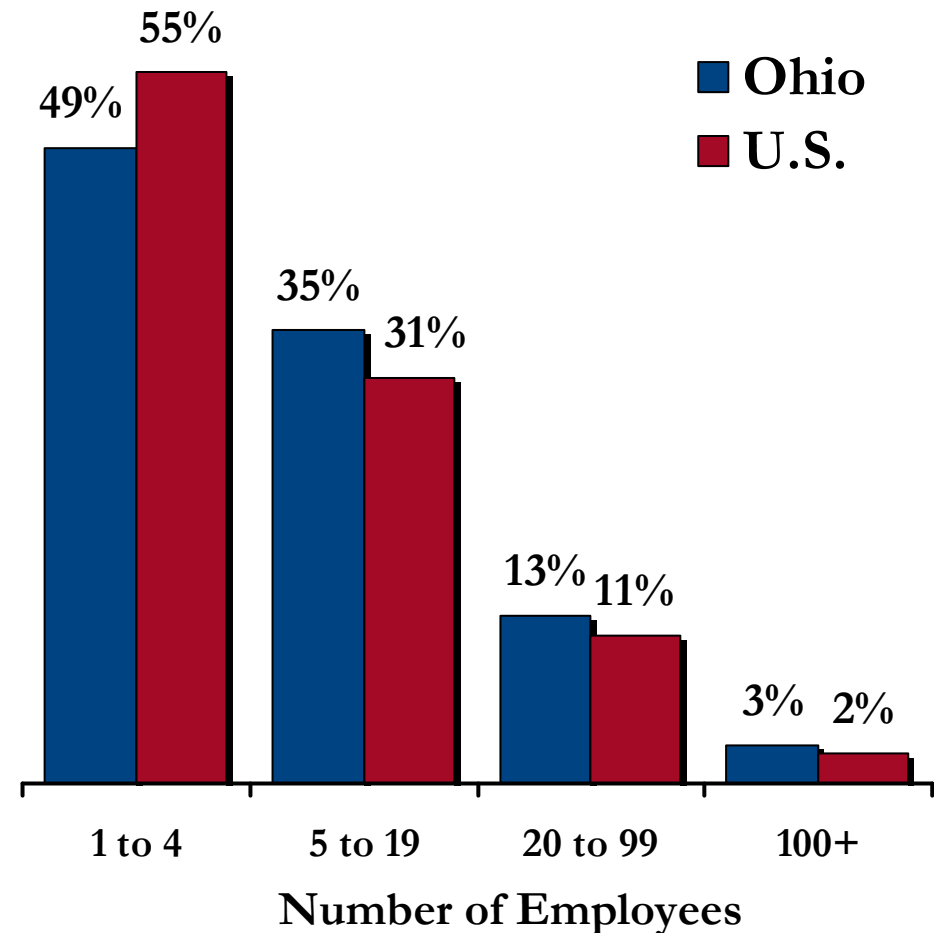
# Ohio Business Environment

## Size Distribution of Ohio Businesses

Almost one-half of all Ohio businesses employ fewer than five employees, while only three percent of businesses employ more than 100 employees.

The Connect Ohio business survey has intentionally over-sampled large businesses to achieve a minimum sample for analysis and comparisons relative to smaller firms.

The survey data are weighted to ensure the total picture is representative of Ohio establishments as a whole (see methodology section for specific information about sampling).

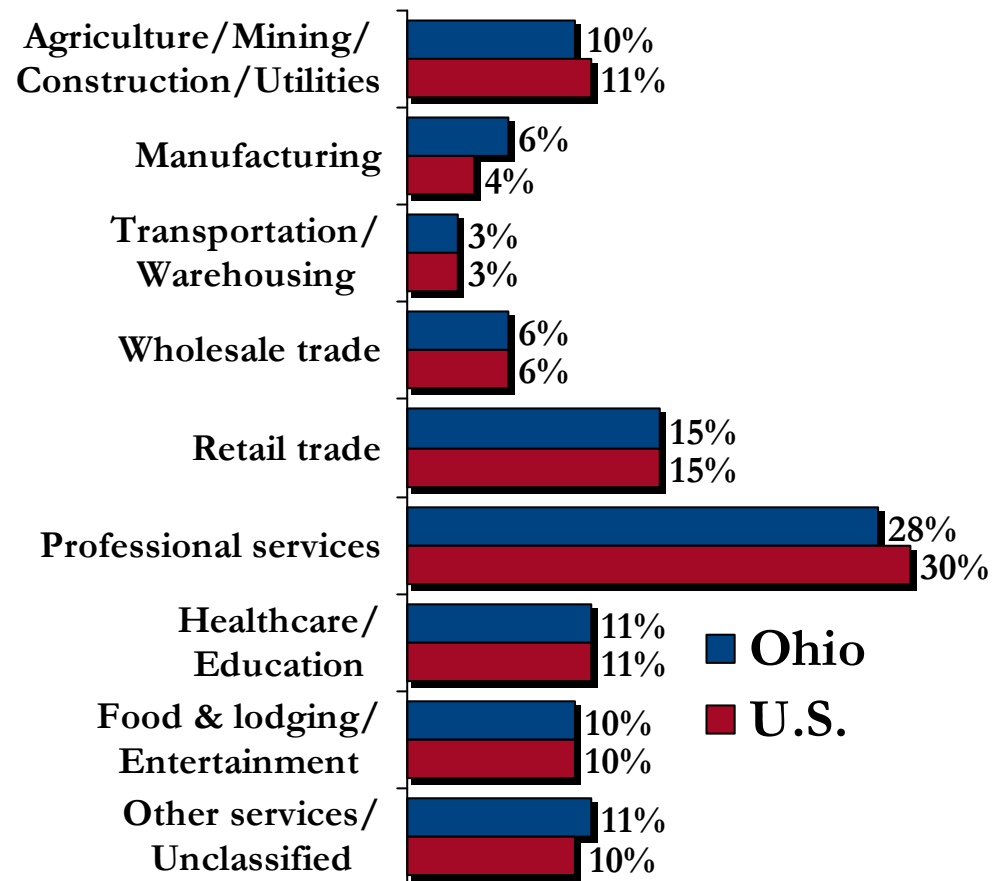


# Industry Breakdown of Ohio Businesses

Ohio has a lower concentration of professional service providers and businesses in the agricultural/mining/construction/utility sector. However, Ohio has a slightly higher concentration of manufacturing and unclassified services businesses.

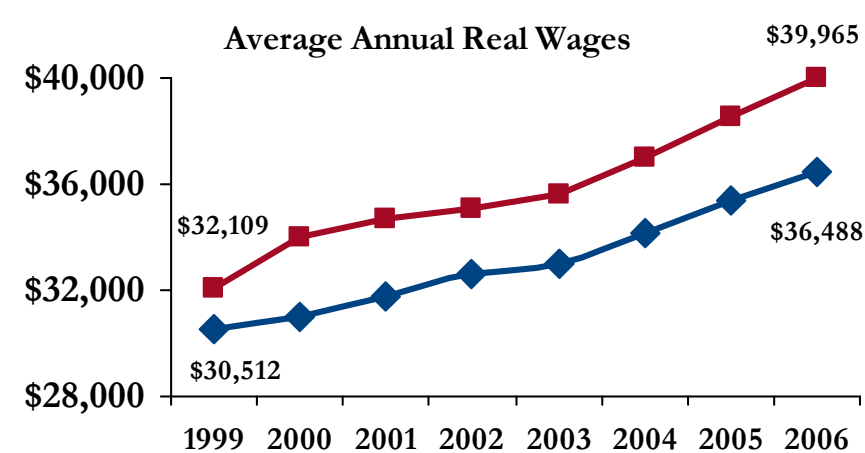
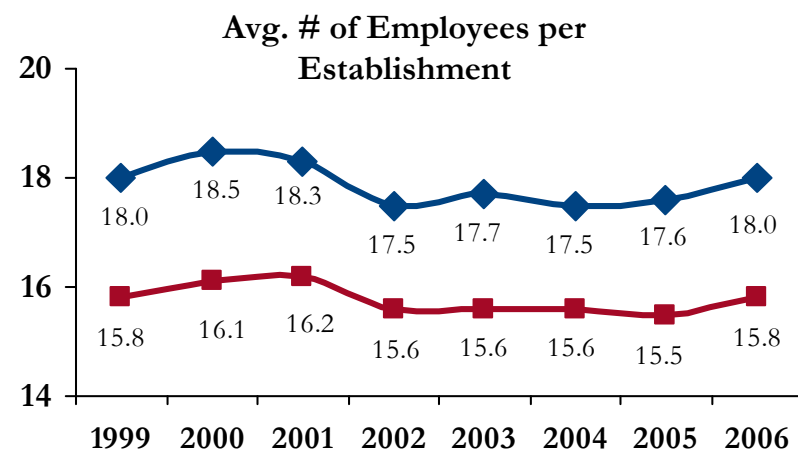
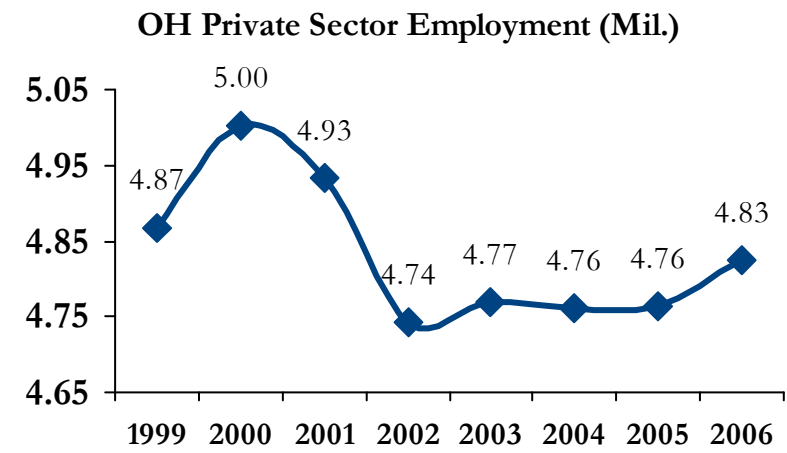
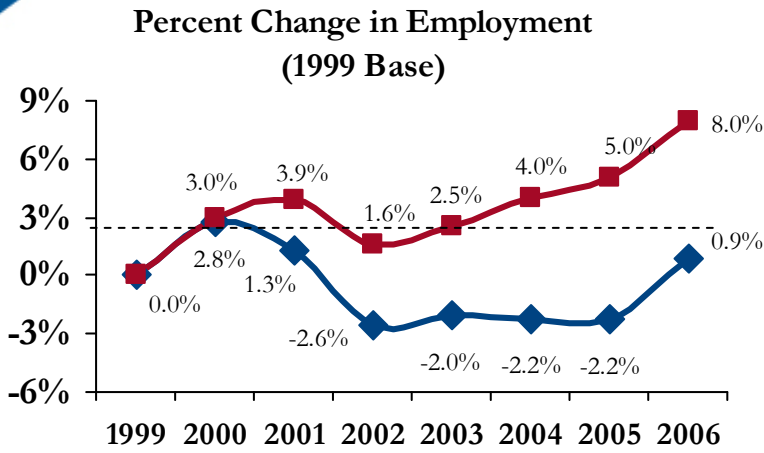
The 2009 Connect Ohio Business Survey data are also weighted with respect to industry sector to ensure the survey sample picture is representative of Ohio establishments.

Industry Sectors\*



\*Industry sectors are categorized by North American Industry Classification System (NAICS) codes. "Professional services" includes NAICS codes 51-56 (information, financial, real estate, professional, technical, management and administrative services).

# Ohio Business and Employment Trends



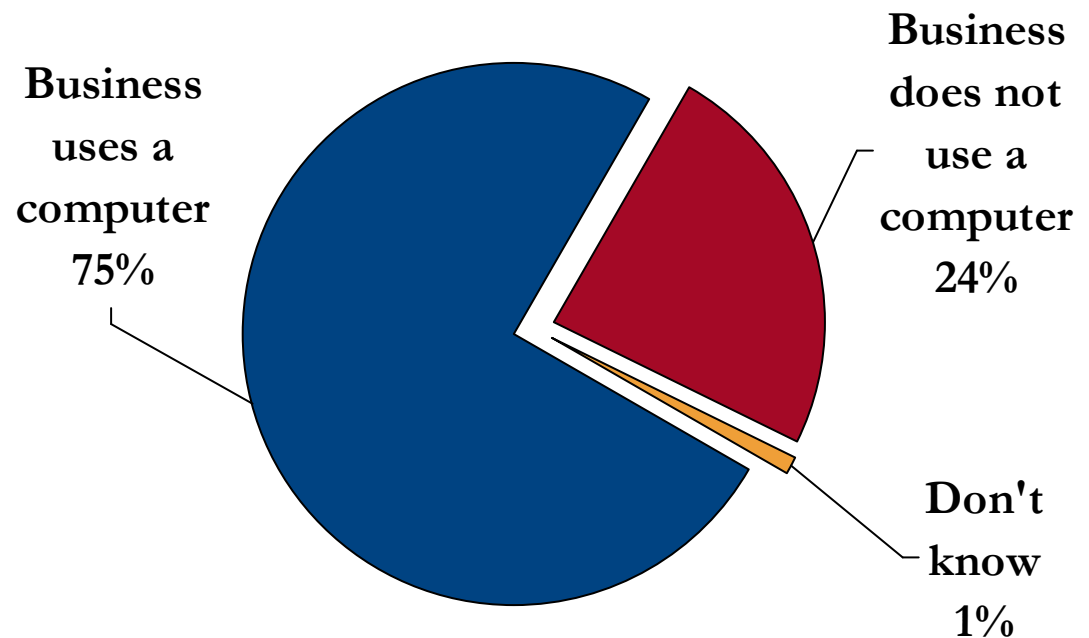
10 Source: U.S. Bureau of the Census, 2006 County Business Patterns

# Computer Ownership and Internet Adoption Among Ohio Businesses

# Use of Computer Technology

Percent of all Ohio businesses

Seventy-five percent of all Ohio businesses use computer technology for their business functions.

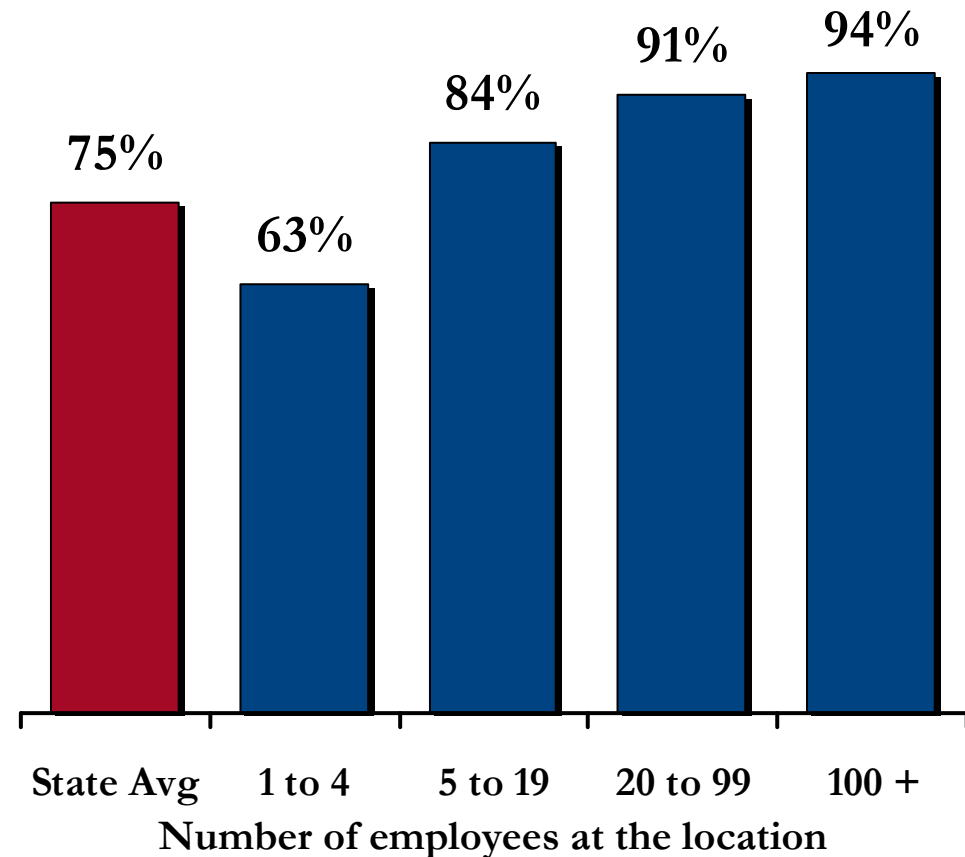


Q: Does your company use any type of computer technology to handle some or all of its business functions (for example: sales, cash receipts, accounting, inventory control or management reporting)?  
(n=802 Ohio businesses)  
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# Computer Use by Business Size

Percent of all Ohio businesses

The statewide rate of computer use varies significantly by company size, rising from 63% of the smallest establishments, to 91% of medium size companies and 94% of the largest companies in Ohio.

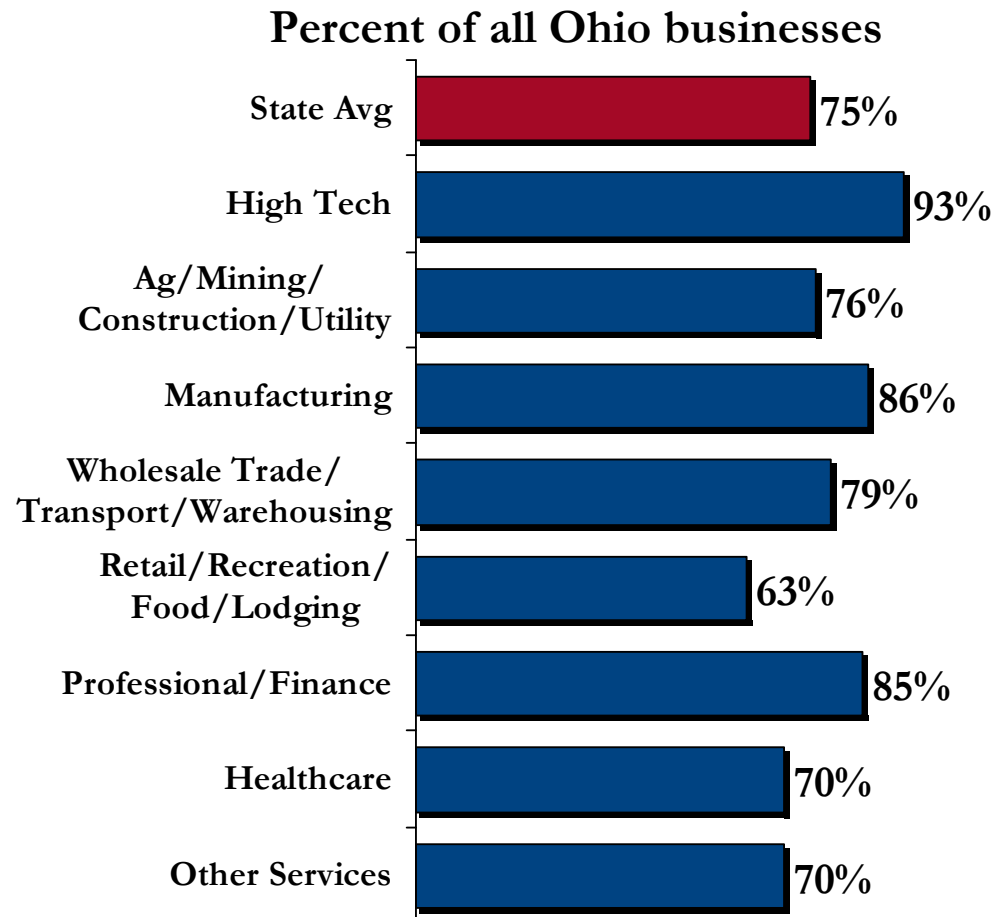


Q: Does your company use any type of computer technology to handle some or all of its business functions (for example: sales, cash receipts, accounting, inventory control or management reporting)?  
 (n=802 Ohio businesses)  
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# Computer Use by Industry Sector

The High Tech (93%), Manufacturing (86%), and Professional/Finance (85%) industry sectors show significantly higher computer use compared to the state average.\*

Businesses in the Retail/Hospitality industry sector use computers significantly less than the average Ohio business.



\*Significance measured at a 95% confidence level

Q: Does your company use any type of computer technology to handle some or all of its business functions (for example: sales, cash receipts, accounting, inventory control or management reporting)?  
(n=802 Ohio businesses)

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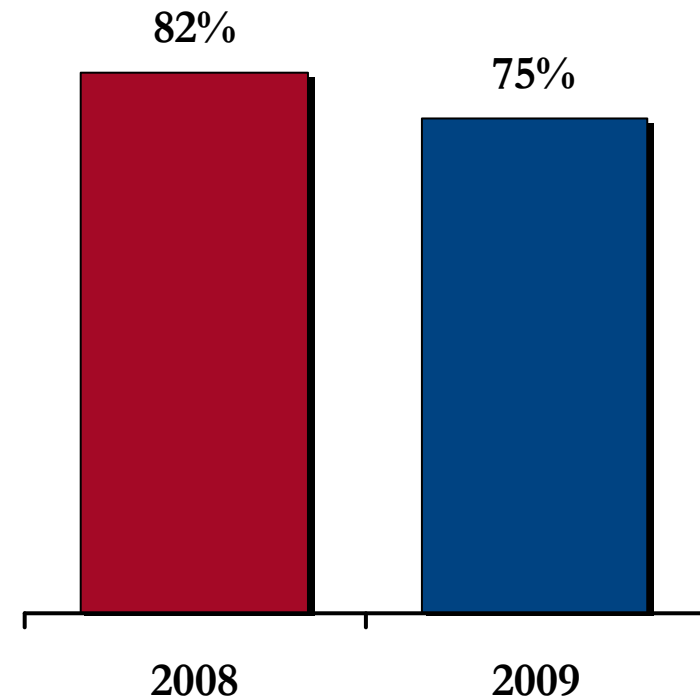
# Trends in Computer Use

In 2009, 75% of Ohio businesses reported that they use computers for their business functions, compared to 82% in 2008.

Ohio businesses have suffered especially badly from the economic recession. The Ohio Coincident Economic Activity Index, which measures the welfare of businesses in each state, dropped nearly twice as fast as the national average between 2008 and 2009.\*

In addition, Ohio's unemployment rate is higher (10.1%) and has risen faster than the national average in the last year.\*\*

Percent of all Ohio businesses



Q: Does your company use any type computer technology to handle some or all of its business functions (for example: sales, cash receipts, accounting, inventory control or management reporting)?

(n=807 Ohio businesses in 2008 and n=802 Ohio businesses in 2009)

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\*Federal Reserve Bank of Philadelphia's Coincident Economic Activity Index, percent change from April 2008-April 2009.

\*\* US Bureau of Labor Statistics, March 2008-March 2009 unemployment rates.

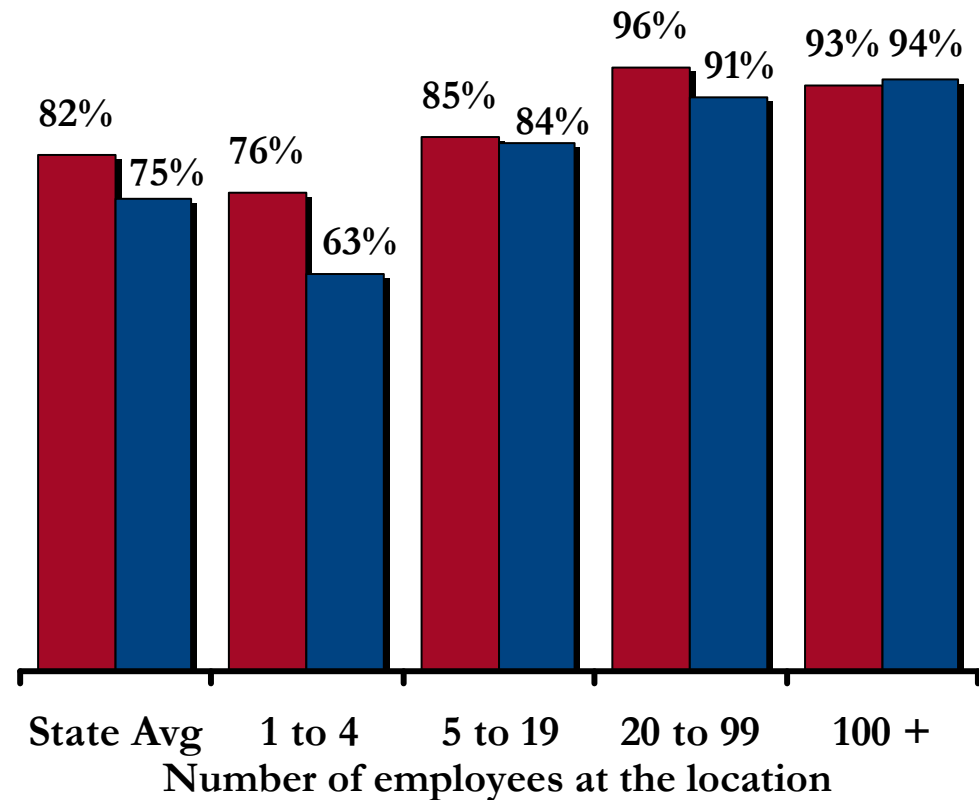
Source: 2008 and 2009 Connect Ohio® Business Technology Assessments  
www.connectohio.org

# Trends in Computer Use by Business Size

Percent of all Ohio businesses

■ 2008 ■ 2009

Computer use among the largest businesses in Ohio (those with 100 employees or more) has gone up slightly since 2008, while smaller businesses report using computers less on average.



Q: Does your company use any type of computer technology to handle some or all of its business functions (for example: sales, cash receipts, accounting, inventory control or management reporting)?

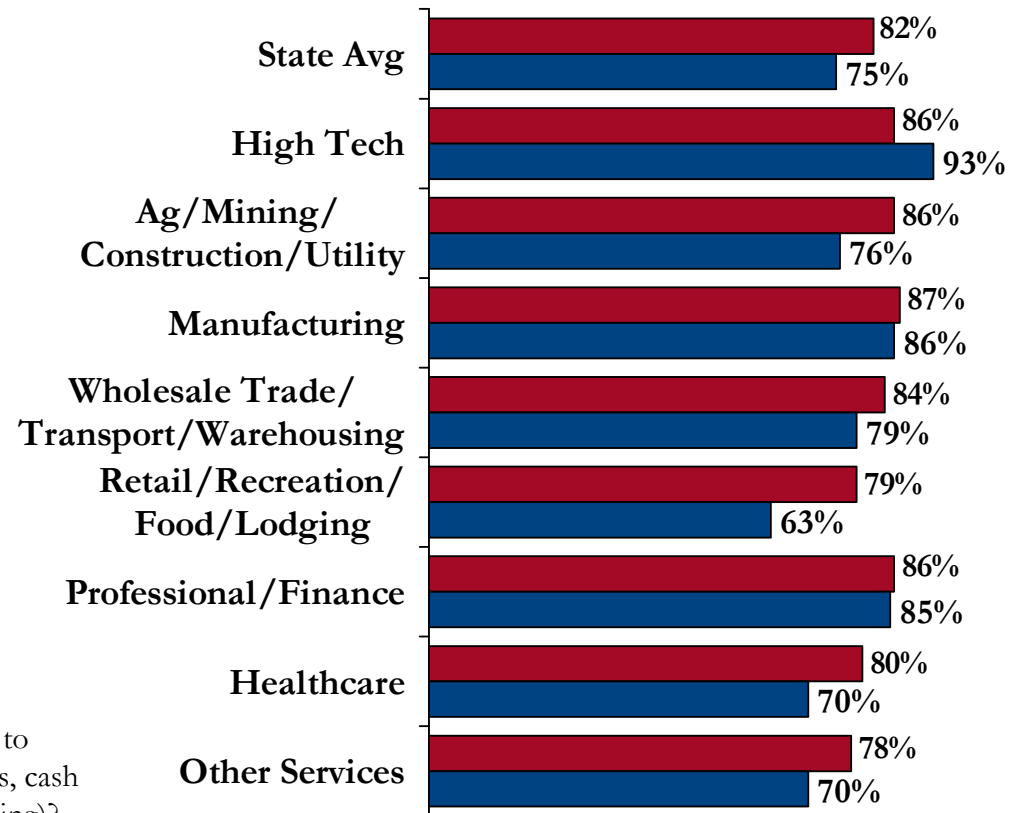
(n=807 Ohio businesses in 2008 and n=802 Ohio businesses in 2009)

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# Trends in Computer Use by Industry Sector

Percent of all Ohio businesses

■ 2008 ■ 2009



Computer use among the businesses in the High Tech industry sector increased since 2008, while every other industry sector saw a decrease in computer use.

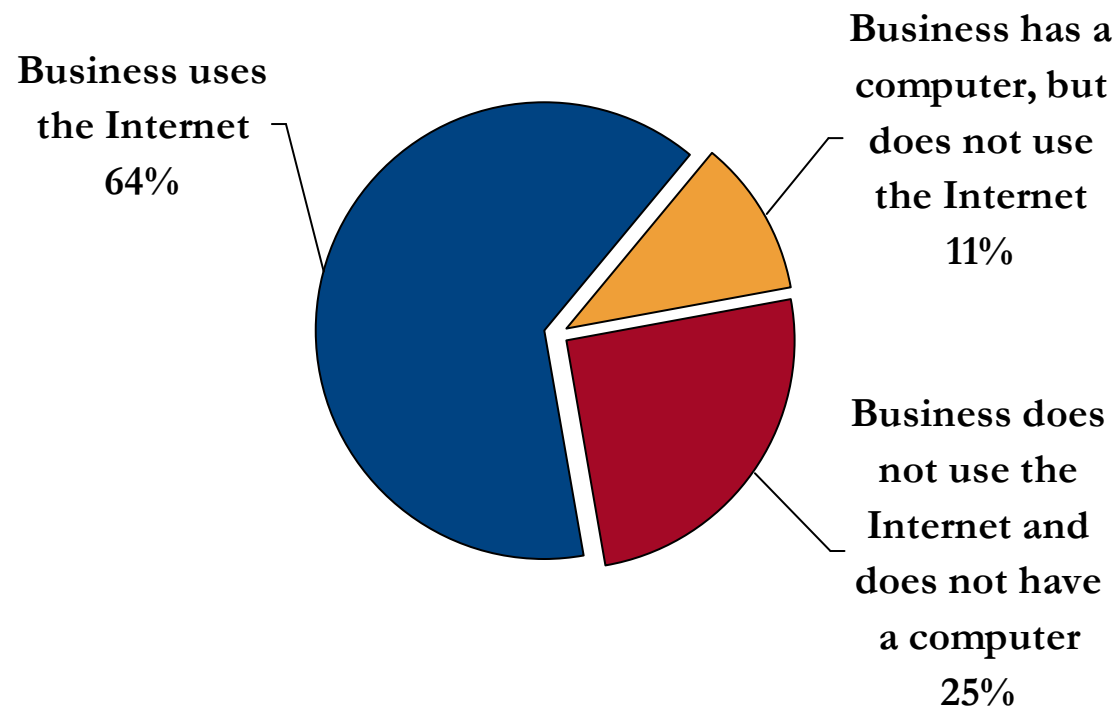
Q: Does your company use any type of computer technology to handle some or all of its business functions (for example: sales, cash receipts, accounting, inventory control or management reporting)?

(n=807 Ohio businesses in 2008 and n=802 Ohio businesses in 2009)

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# Use of the Internet for Business

Percent of all Ohio businesses



Nearly two out of three (64%) of all Ohio businesses use the Internet for their business functions.

Q: Does your company use the Internet to handle any of your business functions?  
(n=802 Ohio businesses)  
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## Internet Use by Company Size

Percent of all Ohio businesses

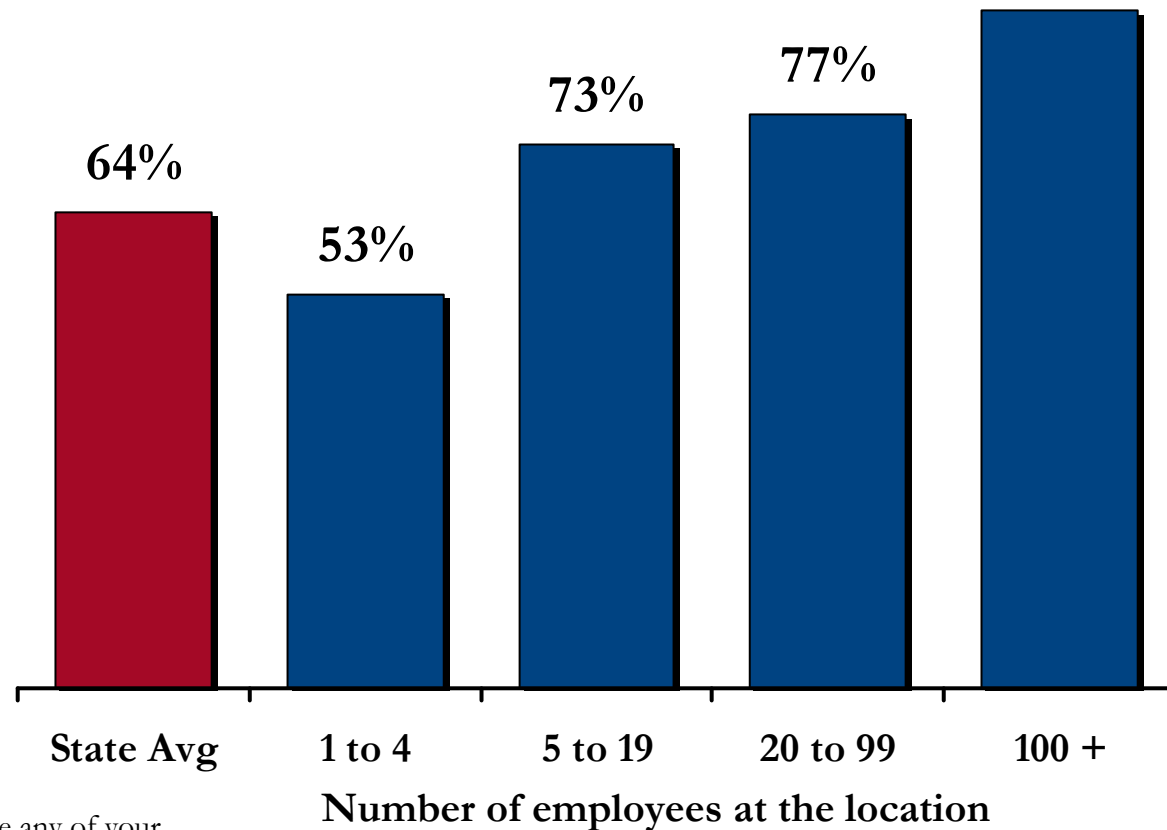
91%

77%

73%

53%

64%



Internet adoption varies significantly with company size, ranging from 53% of the smallest businesses to 91% of the largest businesses.

Q: Does your company use the Internet to handle any of your business functions?

(n=802 Ohio businesses)

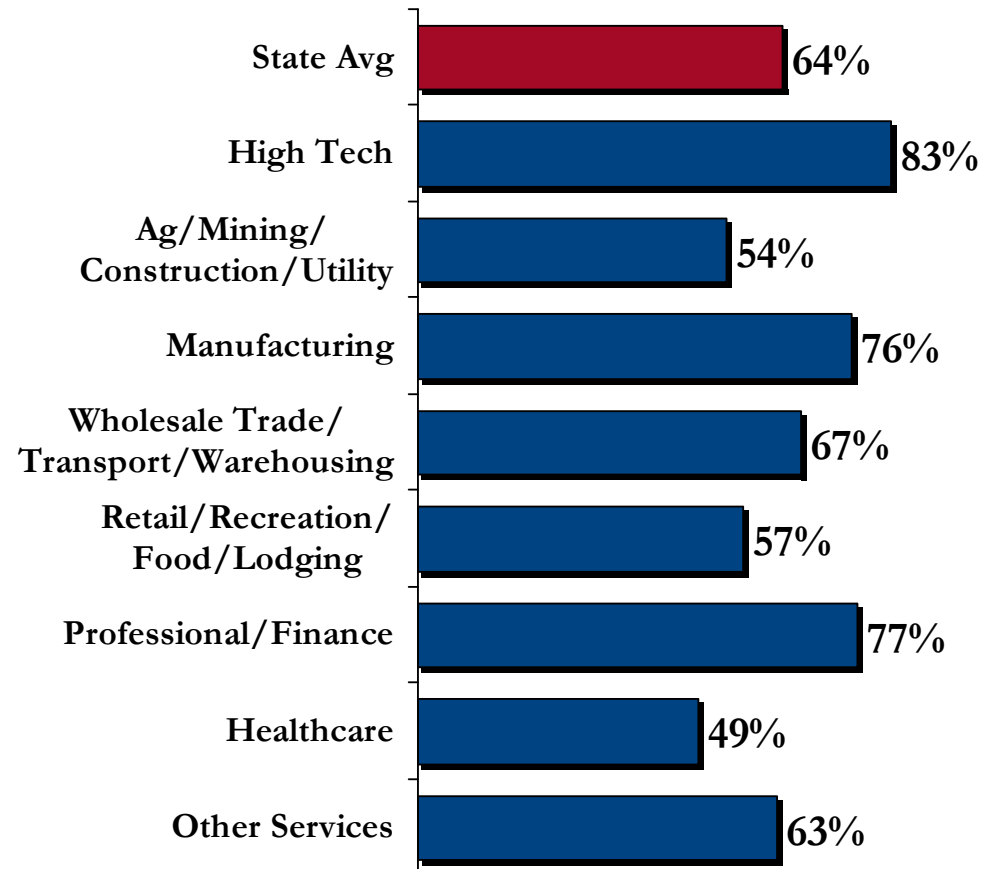
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# Internet Use by Industry Sector

**Businesses in the High Tech, Professional/Finance, and Manufacturing industry sectors have the highest rates of Internet adoption among Ohio businesses.**

**Businesses in the Ag/Mining/Construction/Utility and the Healthcare industry sectors are the least likely to use the Internet for their business functions.**

Percent of all Ohio businesses



Q: Does your company use the Internet to handle any of your business functions?

(n=802 Ohio businesses)

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## Trends in Internet Use by Company Size

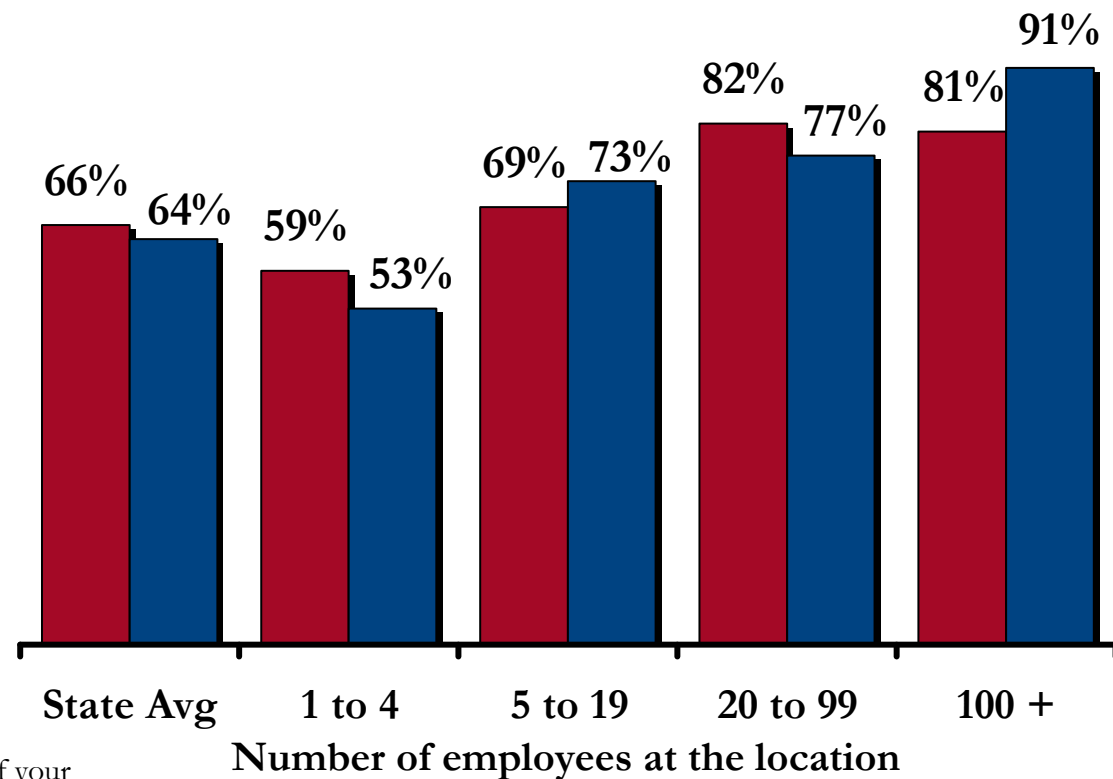
Percent of all Ohio businesses

■ 2008

■ 2009

Internet use among mid-size and large Ohio businesses increased since 2008, while among small businesses (those with fewer than five employees) Internet use decreased.

The decrease in Internet use among small businesses coincides with the decrease in computer use among these same businesses



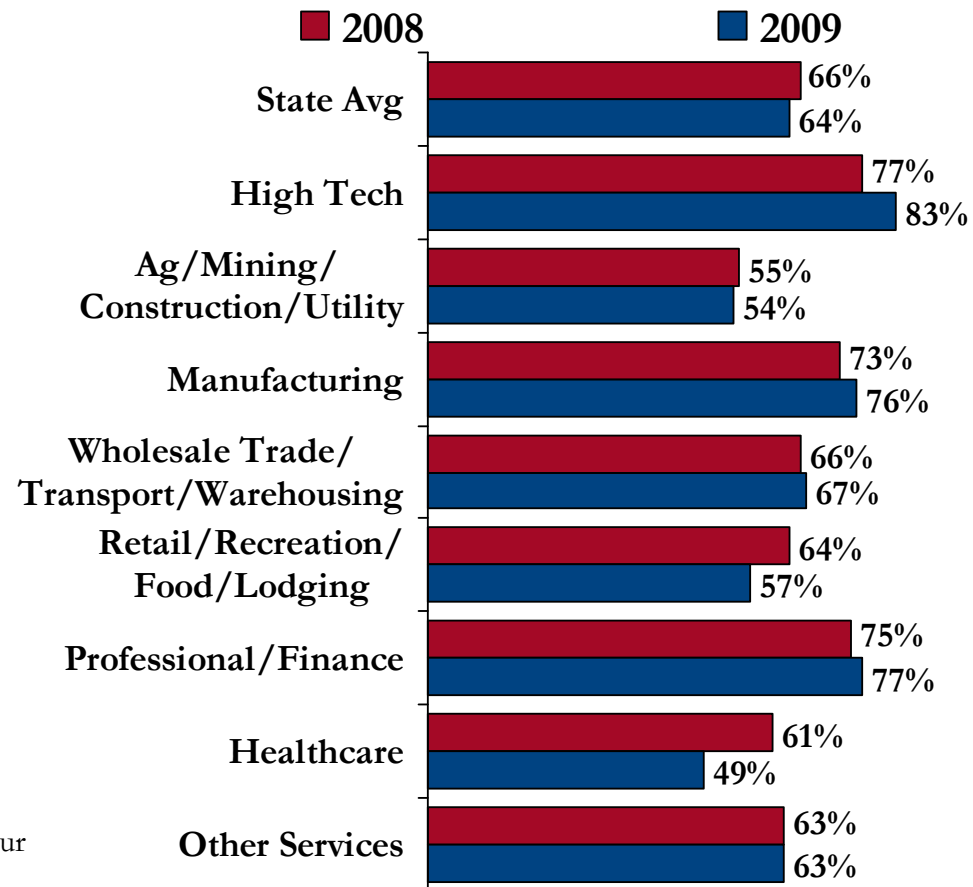
Q: Does your company use the Internet to handle any of your business functions?

(n=807 Ohio businesses in 2008 and n=802 Ohio businesses in 2009)

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# Trends in Internet Use by Industry Sector

Percent of all Ohio businesses



**Businesses in the High Tech, Professional/Finance, Manufacturing, and Wholesale Trade/Transport industry sectors report increased use of the Internet for business purposes in the past year, while businesses in the Retail/Hospitality and Healthcare sectors decreased.**

Q: Does your company use the Internet to handle any of your business functions?

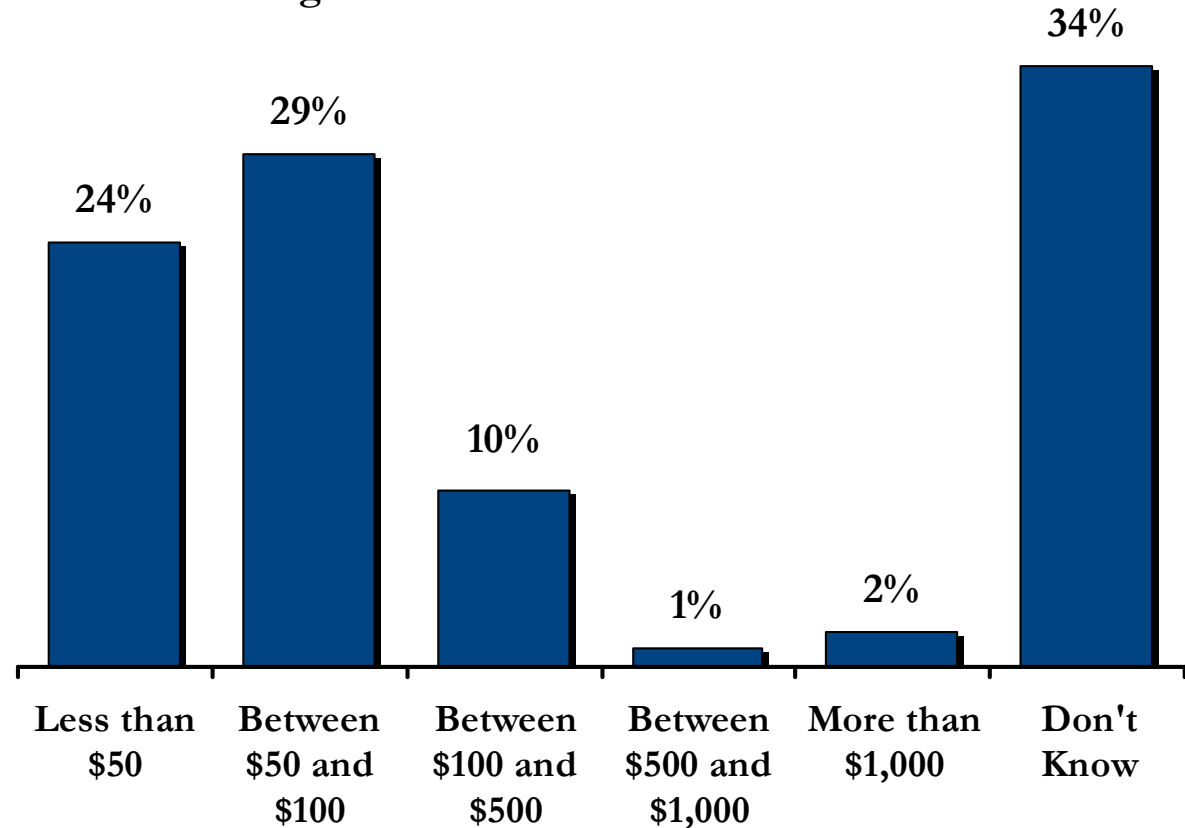
(n=807 Ohio businesses in 2008 and n=802 Ohio businesses in 2009)

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# Monthly Internet Access Fees

Among Ohio businesses with Internet service

The median monthly fee for Internet service is \$66, while the mean price is \$145 per month.



Monthly price that businesses pay for Internet service

Q: How much per month does your organization pay for its Internet connection?

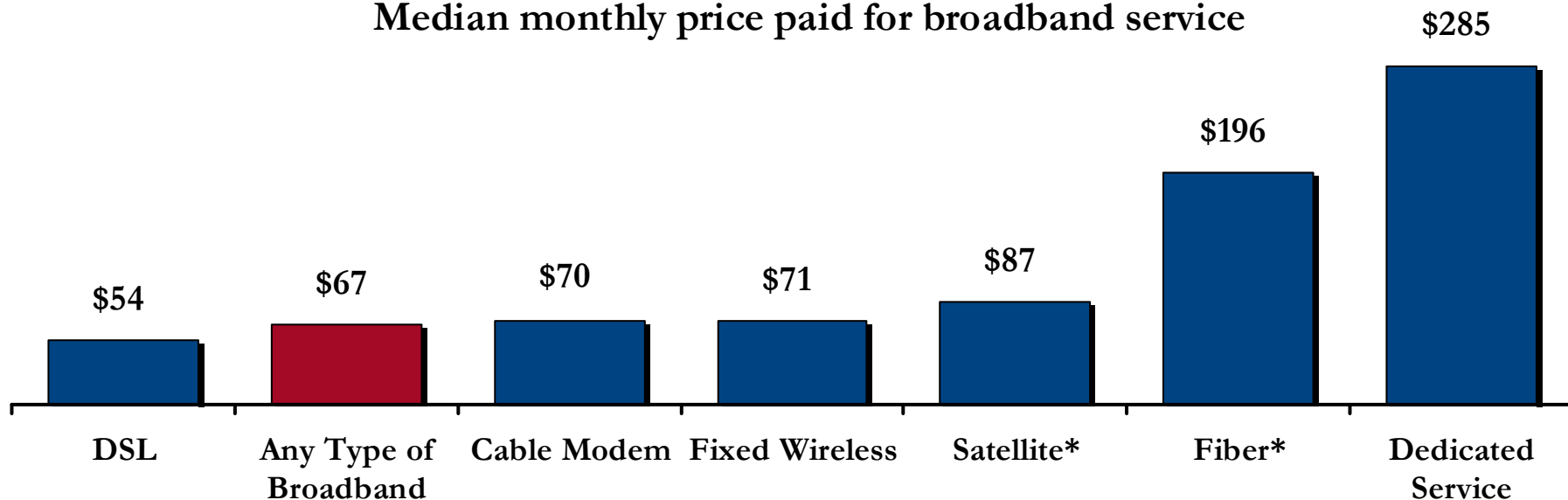
(n=578 Ohio businesses that use the Internet)

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## Median Monthly Fees by Type of Internet Connection

The median monthly cost for broadband service is \$67 per month, with the lowest costs reported among businesses using DSL and the highest costs reported among businesses using dedicated services.

Median monthly price paid for broadband service



\*Medians may be affected by small sample size of businesses relying on these platforms (n=20 businesses with satellite and n=29 businesses with fiber)

Q: How much per month does your organization pay for its Internet connection?

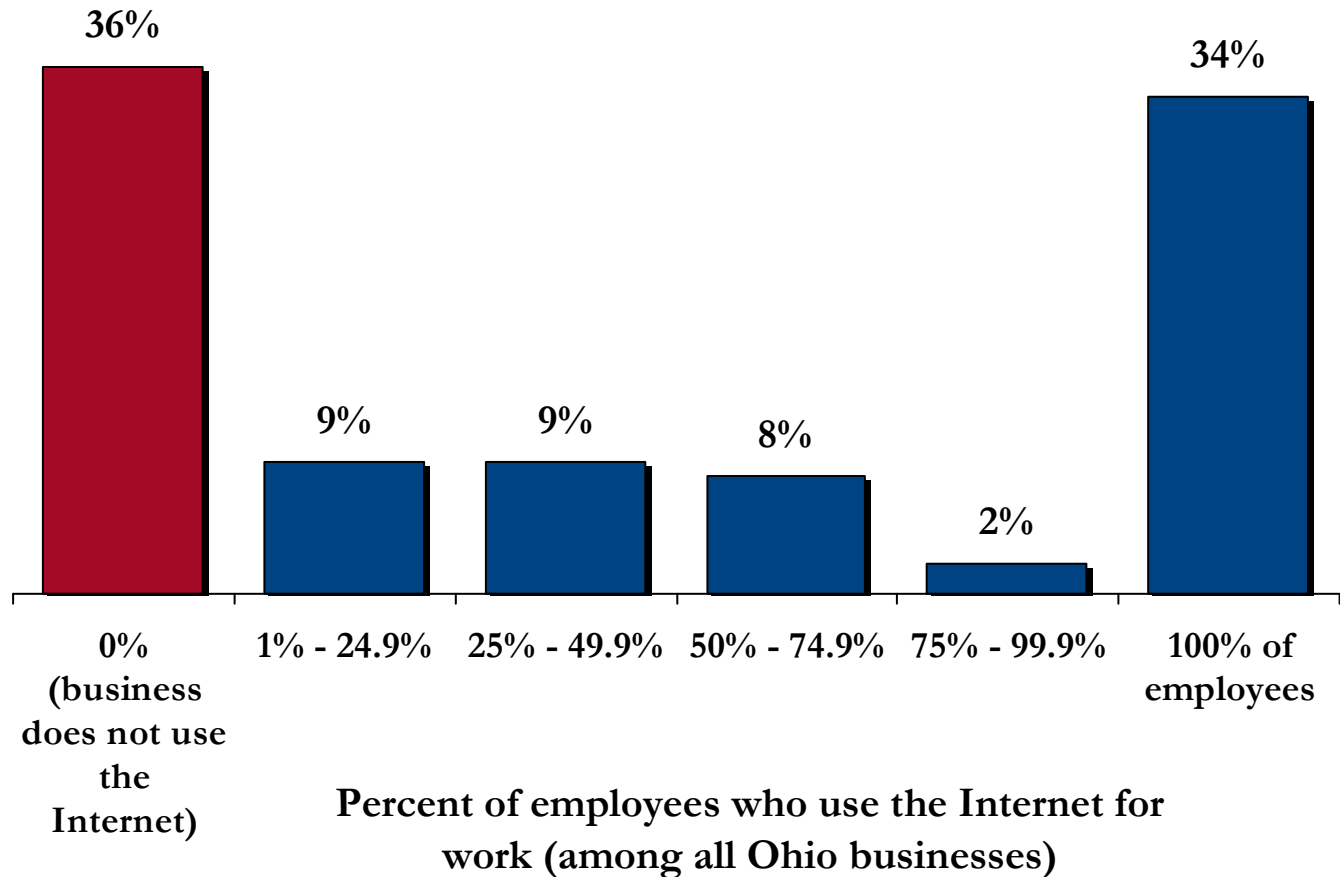
(n=578 Ohio businesses that use the Internet)

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## Internet Use Within the Company

On average, 71% of the employees at each Internet-connected business rely on the Internet for their work functions.

In more than one-third of Ohio businesses, 100% of employees rely on the Internet for their business functions.



Q: How many employees at this business location use the Internet for business purposes?  
 (n=802 Ohio businesses)  
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# Broadband Adoption Among Ohio Businesses

# Broadband Adoption Among Ohio Businesses

Percent of all Ohio businesses that have

Dial-up service

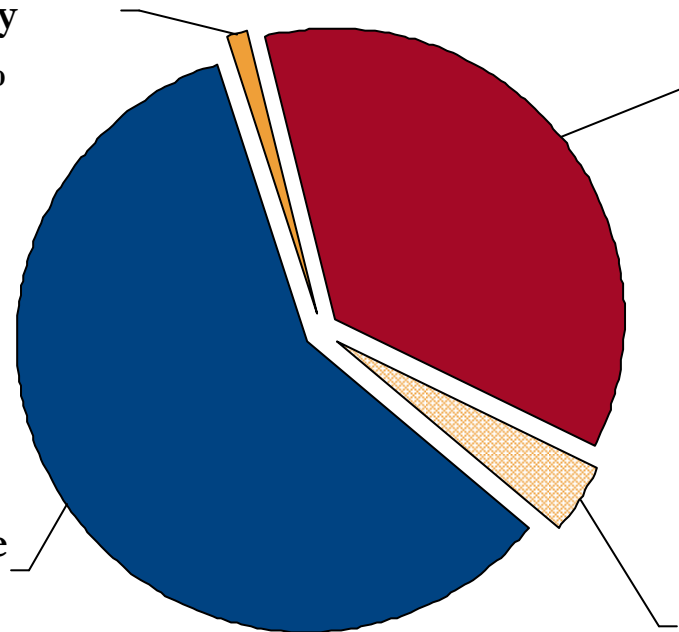
only  
1%

No Internet  
service  
36%

Broadband service  
59%

Don't know  
4%

Nearly 60% of all Ohio businesses subscribe to broadband service.



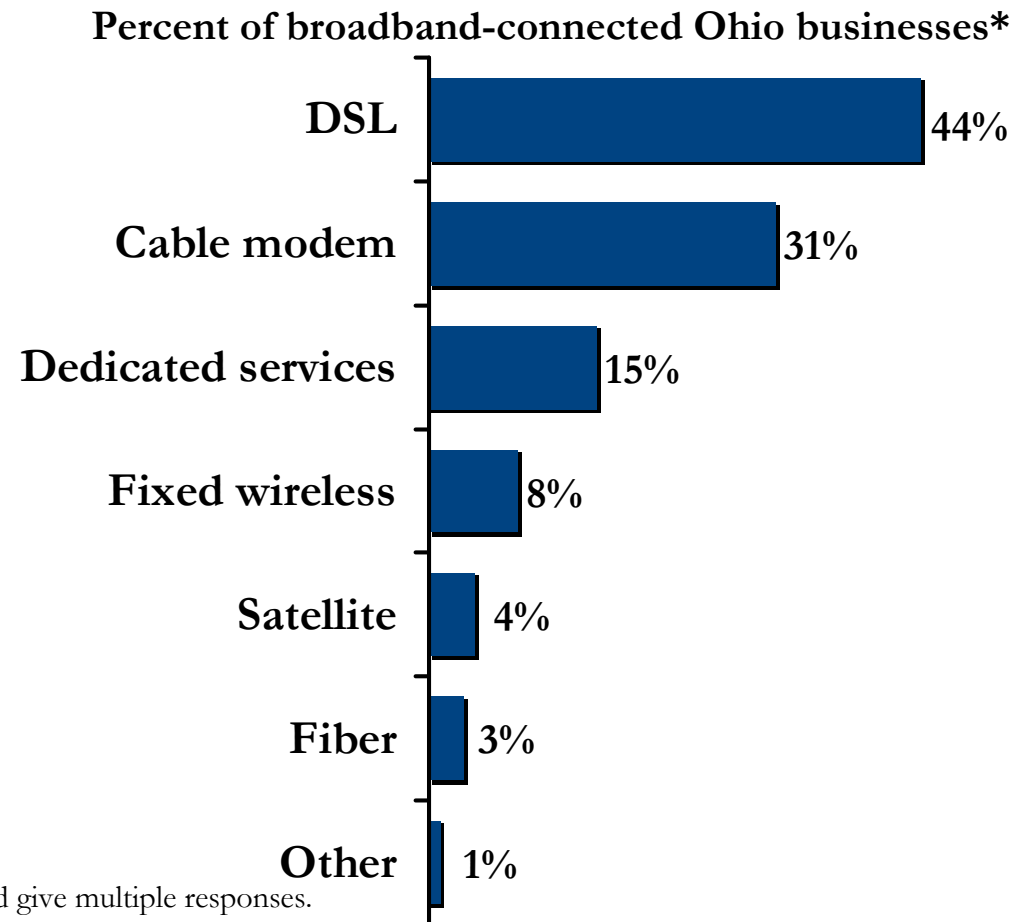
Q: Which of the following describe the type of Internet access your company has?  
(n=802 Ohio businesses)  
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# Methods of Broadband Access

**DSL lines serve nearly one-half (44%) of businesses with high-speed connections.**

**Nearly one-third (31%) of broadband-connected businesses have cable modem connections, and 15% of broadband-connected businesses rely on dedicated services.**

**Only 2% of online businesses rely exclusively on dial-up Internet access.**



\*Percentages do not add up to 100% because businesses could give multiple responses.

Q: Which of the following describe the type of Internet access your company has?

(n=535 broadband-connected Ohio businesses)

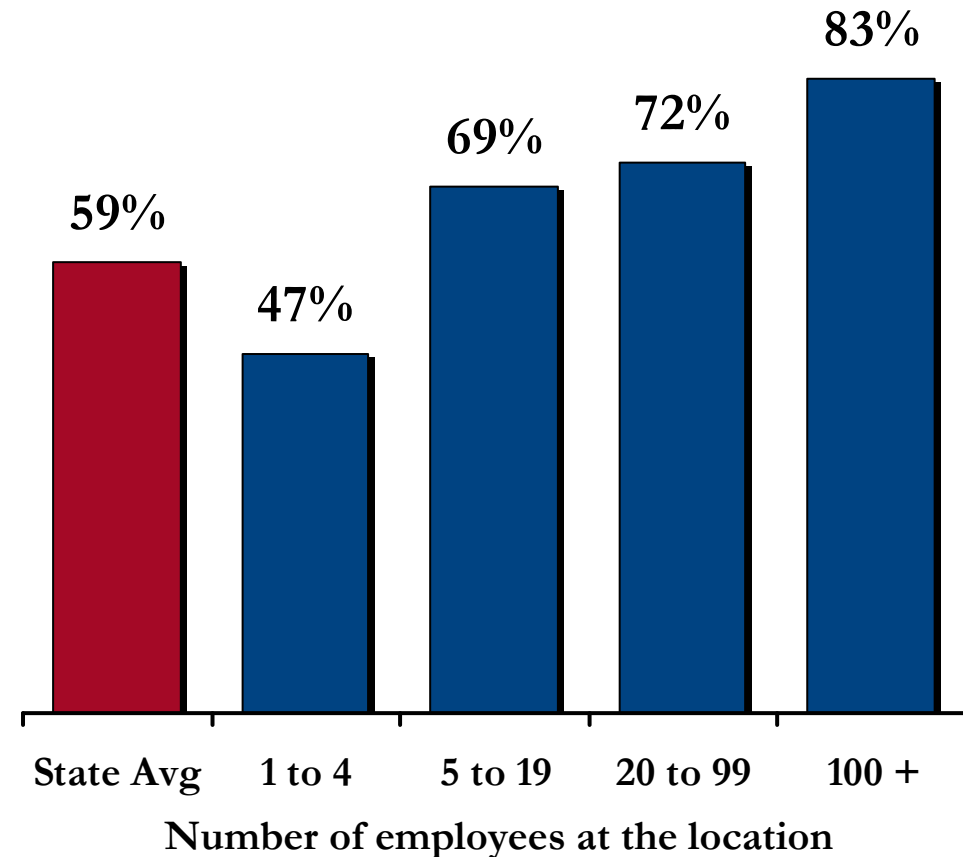
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## Broadband Adoption by Company Size

Percent of all Ohio businesses

Broadband adoption among Ohio businesses varies significantly by company size, rising from about one-half (47%) of the smallest establishments, to nearly three-fourths (72%) of medium-size companies and 83% of the largest companies in Ohio.

Ohio businesses that employ more than twenty workers are significantly more likely to have a broadband connection than small businesses with fewer than five employees.



Q: Which of the following describe the type of Internet access your company has?

(n=802 Ohio businesses)

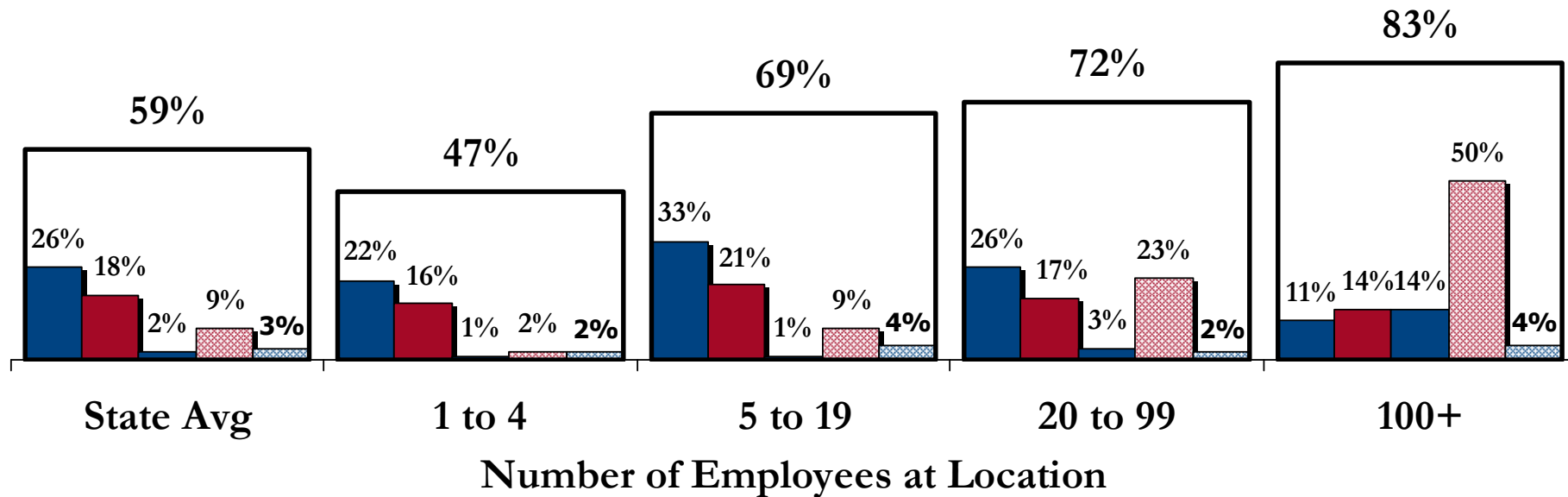
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## Broadband Adoption by Company Size

Among businesses with fewer than 100 employees, DSL is the most popular type of broadband. Larger businesses with 100+ employees are more likely to use dedicated services.

### Type of Internet Access

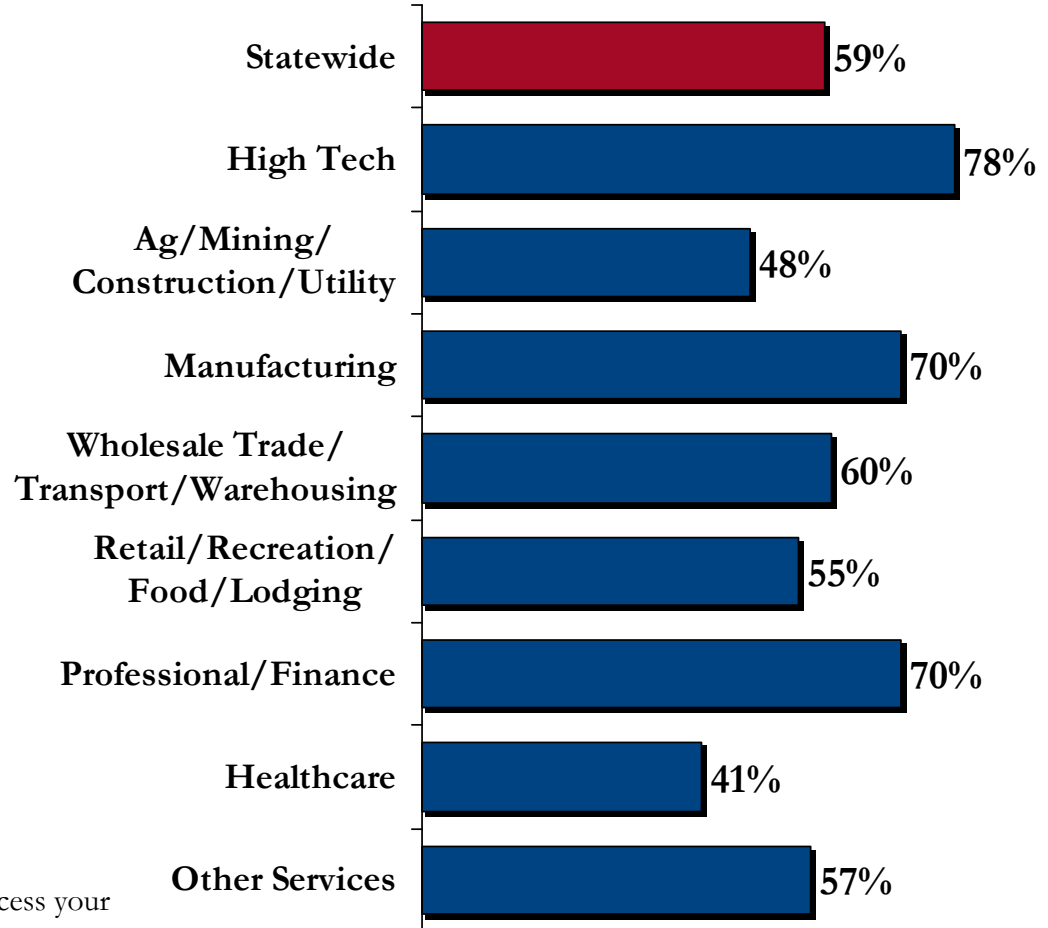
■ DSL ■ Cable Modem ■ Fiber ■ Dedicated services ■ Satellite □ Any Broadband



Q: Which of the following describe the type of Internet access your company has?  
 (n=802 Ohio businesses)  
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# Broadband Adoption by Industry Sector

Percent of all Ohio businesses

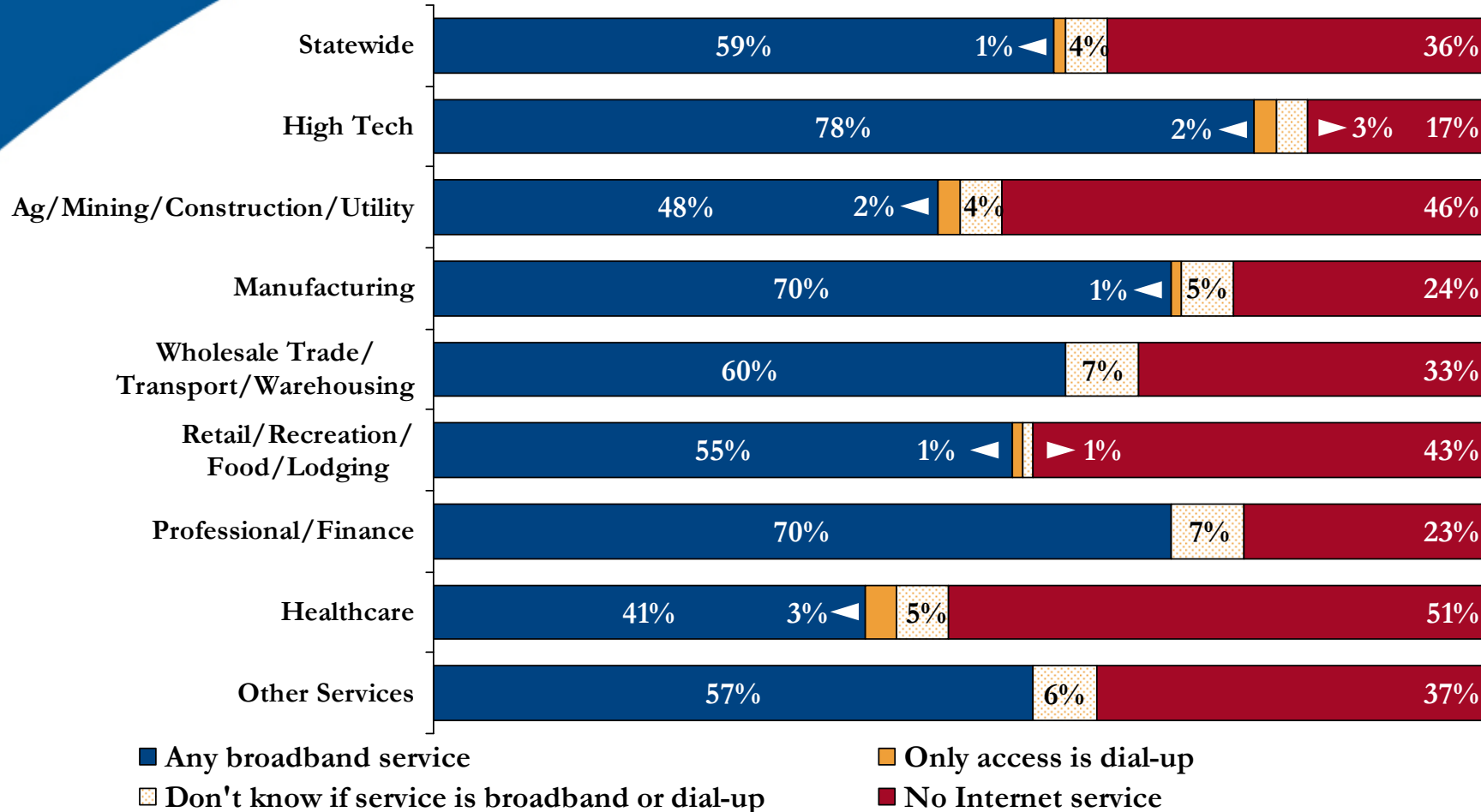


**Businesses in the High Tech industry sector are the most likely to adopt broadband, followed closely by the Professional/Finance and Manufacturing industry sectors.**

**Businesses in the Healthcare sector are the least likely to use broadband service.**

Q: Which of the following describe the type of Internet access your company has?  
(n=802 Ohio businesses)  
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## Broadband Adoption by Industry Sector



Q: Which of the following describe the type of Internet access your company has?

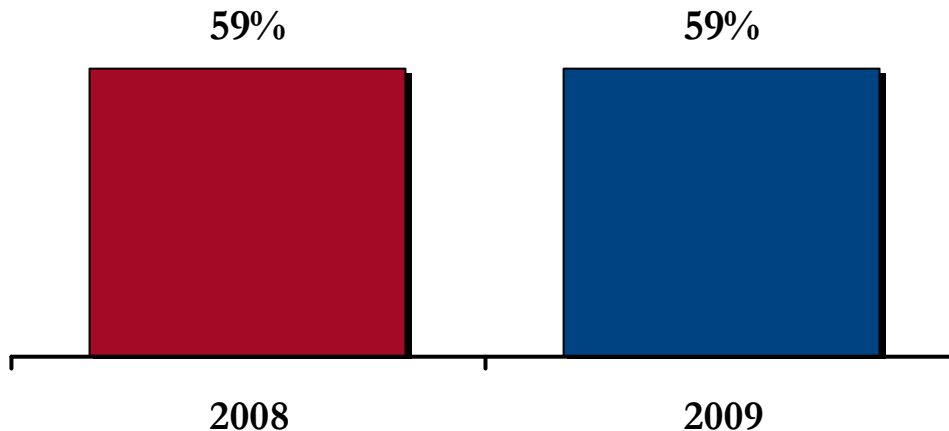
(n=802 Ohio businesses)

2009 © Connect Ohio®

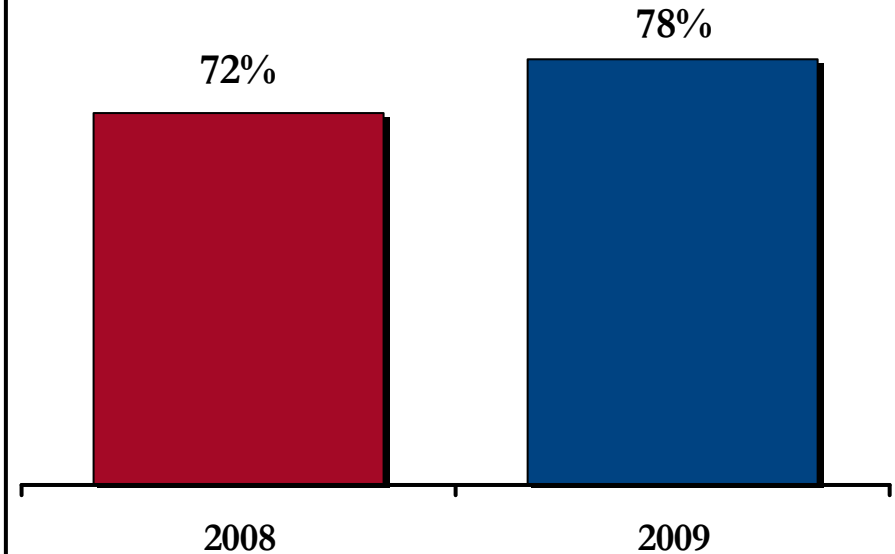
# Broadband Adoption Among Ohio Businesses

Broadband adoption among all Ohio businesses has remained unchanged since 2008; however, broadband adoption among businesses that use computers has increased by 8% in the past year.

Percent of all Ohio businesses



Percent of computer-using Ohio businesses that subscribe to broadband



Q: Which of the following describe the type of Internet access your company has?

(n=807 Ohio businesses in 2008, 662 of which used computers, and n=802 Ohio businesses in 2009, 673 of which used computers)

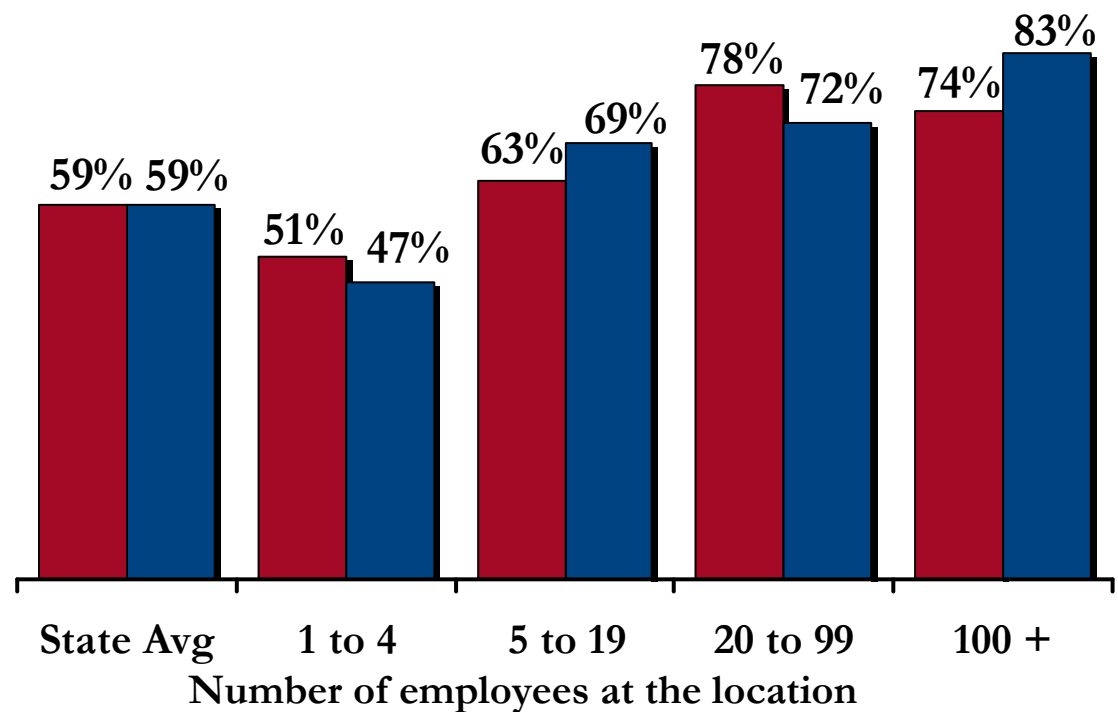
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# Trends in Broadband Adoption by Company Size

Percent of all Ohio businesses

■ 2008      ■ 2009

Echoing trends in computer and Internet use, broadband use declined among the smallest businesses (1-4 employees), while broadband use increased 6% among businesses with 5 or more employees

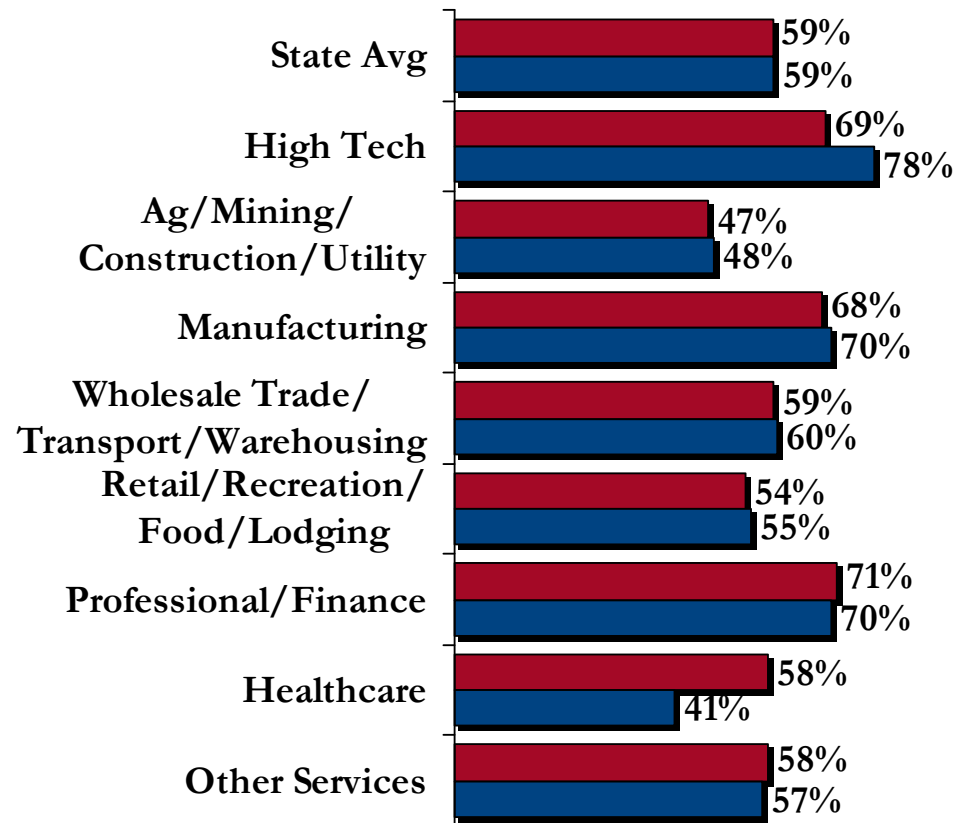


Q: Which of the following describe the type of Internet access your company has?  
(n=807 Ohio businesses in 2008 and n=802 Ohio businesses in 2009)  
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# Trends in Broadband Adoption by Industry Sector

Percent of all Ohio businesses

■ 2008 ■ 2009



In the past year, broadband adoption has increased or remained unchanged in most industry sectors, despite noticeable decreases in computer use in several of these sectors. Broadband adoption appears to have decreased over the past year in the healthcare sector.

Q: Which of the following describe the type of Internet access your company has?  
 (n=807 Ohio businesses in 2008 and n=802 Ohio businesses in 2009)  
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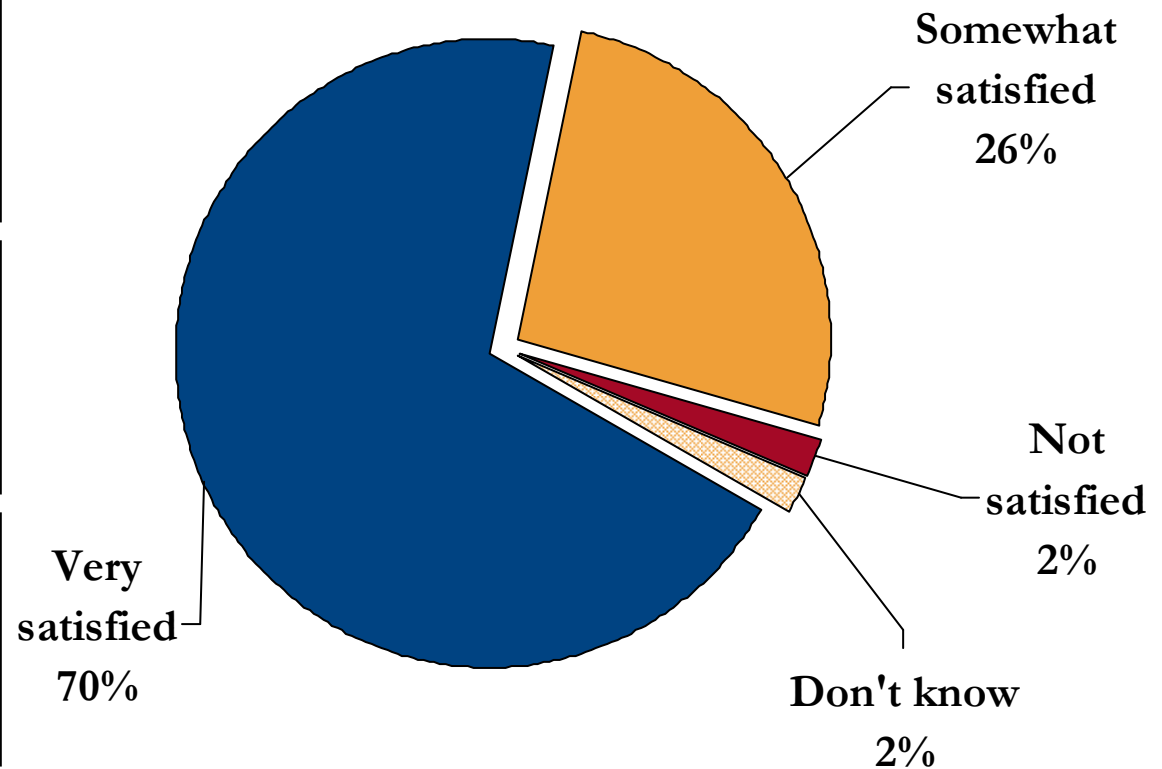
## Satisfaction With Broadband

Percent of broadband-connected Ohio businesses

Seven out of ten businesses that have broadband say they are very satisfied with their service.

An additional 26% of businesses say they are somewhat satisfied with their broadband service.

Two percent of broadband-connected businesses reported being dissatisfied with their service.



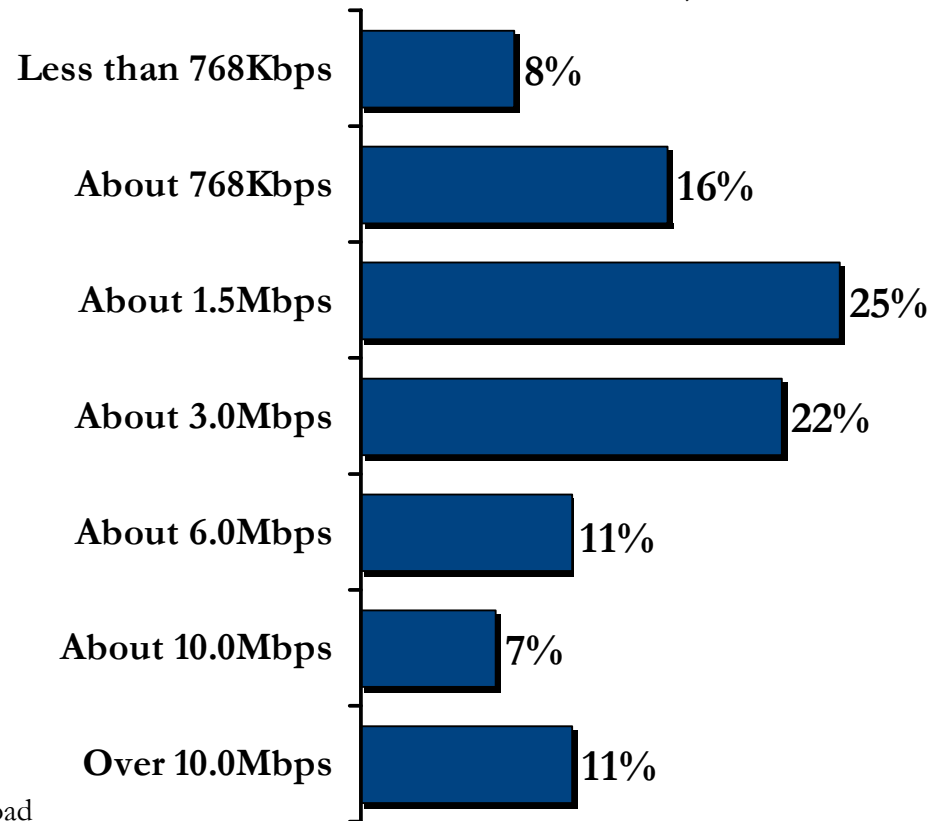
Q: How satisfied are you with your broadband service?  
(n=535 Ohio businesses that have broadband service)  
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37  
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Source: 2009 Connect Ohio®  
Business Technology Assessment  
[www.connectohio.org](http://www.connectohio.org)

# Current Download Speeds

**Current estimated download speeds**  
(among broadband-connected Ohio businesses that know their current bandwidth)



**More than one-half of broadband-connected Ohio businesses do not know their current download speed or bandwidth.**

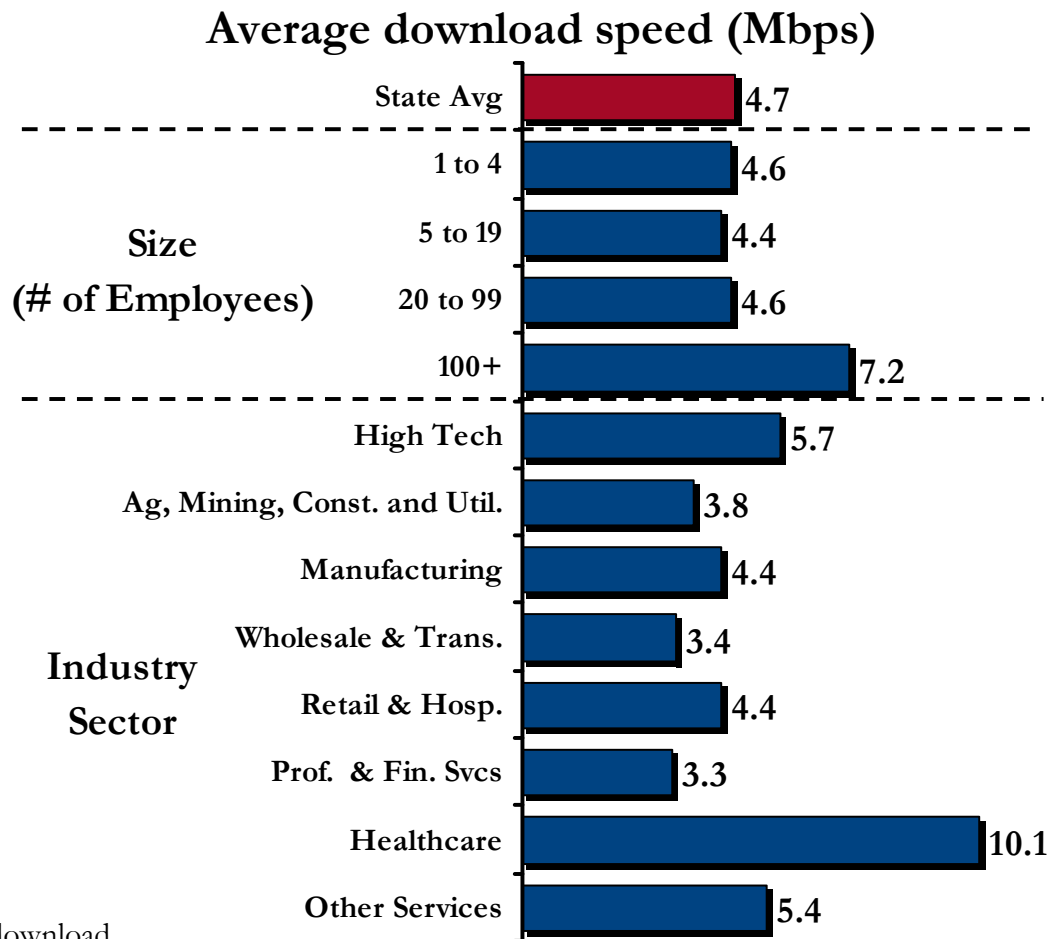
**Statewide, broadband-connected Ohio businesses report an average download speed of 4.7Mbps. This is up from an average of 2.8 Mbps in 2008.**

Q: To the best of your knowledge, what is the approximate download speed or bandwidth provided by your Internet service provider?  
(n=282 Ohio businesses that use broadband service and know their approximate download speed)

# Broadband Download Speeds by Size and Industry Sector

**Businesses in the Healthcare industry have the highest average download speed among broadband-connected Ohio businesses.**

**Larger businesses have higher average download speeds than smaller ones.**



Q: To the best of your knowledge, what is the approximate download speed or bandwidth provided by your Internet service provider?  
(n=535 Ohio businesses that have broadband service)

# Actual Broadband Speeds Compared to Advertised Speeds

How actual broadband speeds compare to advertised speeds  
(among broadband-connected Ohio businesses)

About the same  
as advertised

70%

Slower than  
advertised

14%

Faster than  
advertised

6%

Don't know

10%

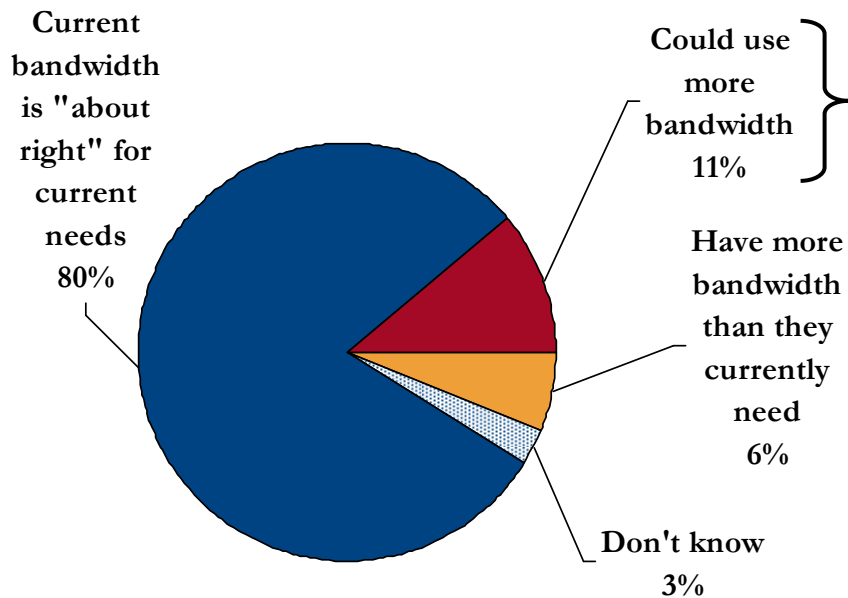
Three out of four  
broadband-connected  
businesses (76%) say their  
actual broadband speeds  
are about as fast or faster  
than advertised, and 14%  
report slower speeds than  
advertised.

Q: To what extent would you say the actual speeds your business receives compares to the speeds advertised by the Internet provider you use?  
(n=535 Ohio businesses that have broadband service)

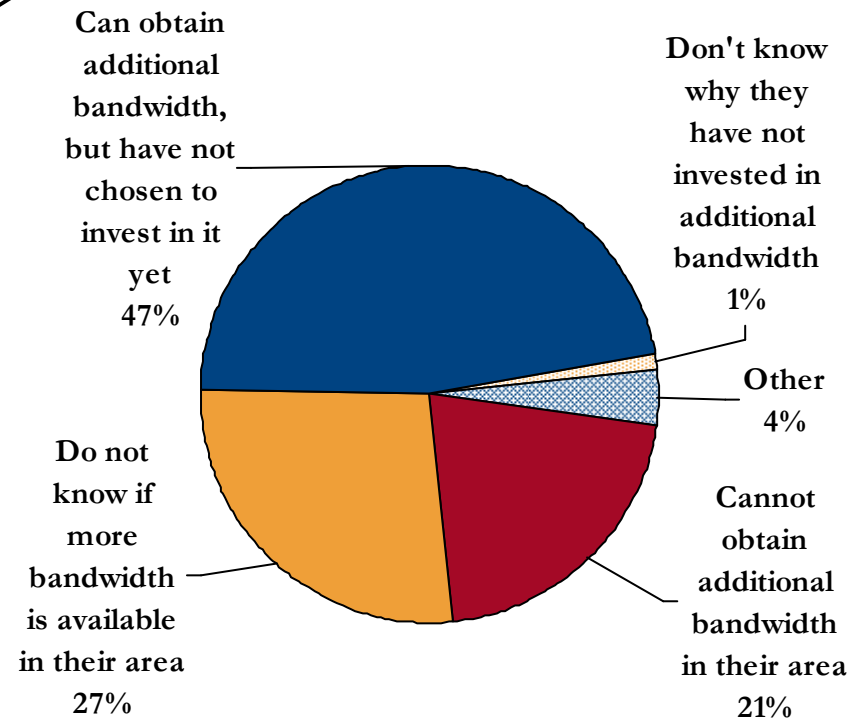
40

# Broadband Speeds (Bandwidth) and Current Business Needs

Among all broadband-connected Ohio businesses



Among businesses that say they need more bandwidth

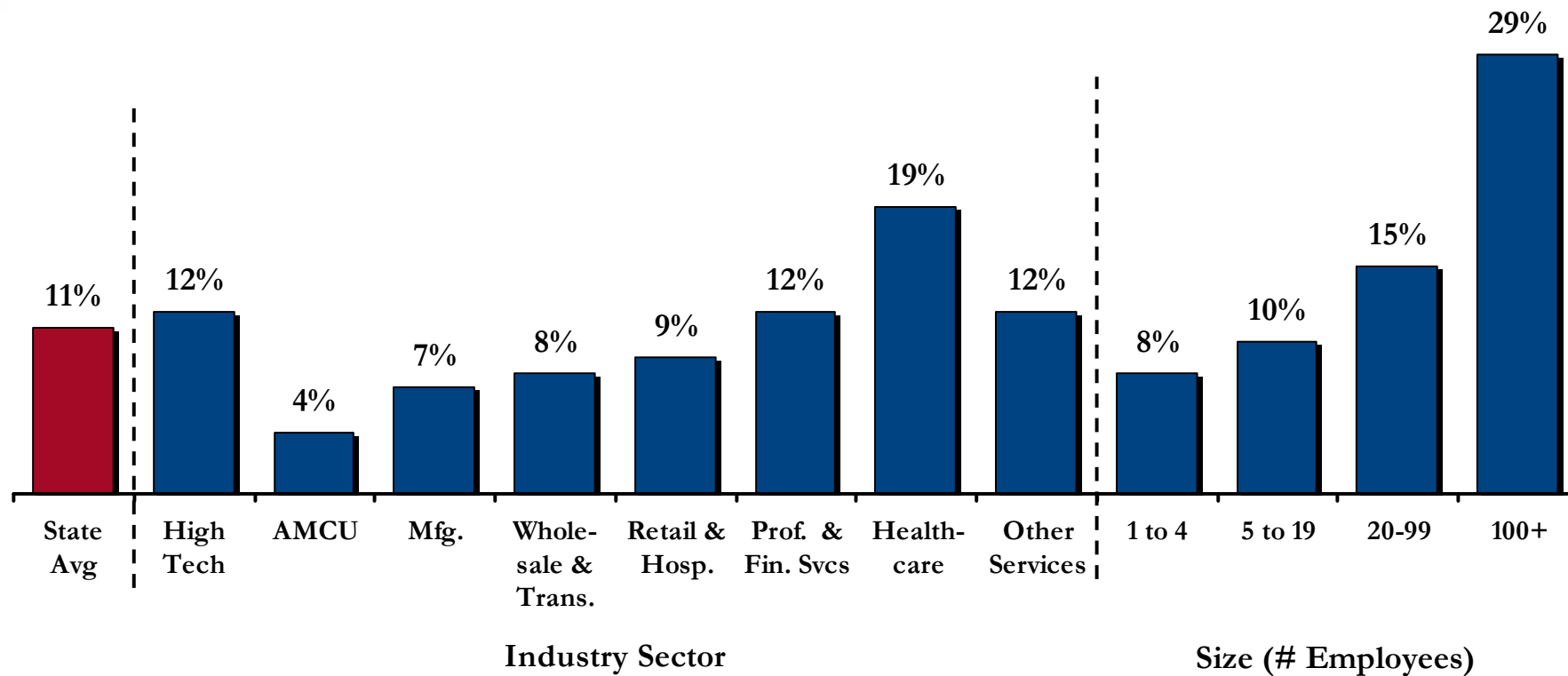


Q: How well does your current bandwidth meet your needs? and  
 Q: Which of the following apply to your company's need for additional bandwidth?

(n=535 Ohio businesses that use broadband service and  
 n=72 Ohio businesses that say they could use more bandwidth)  
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# Businesses That Say They Need More Bandwidth by Size and Industry Sector

Percent of broadband-connected businesses that say they need more bandwidth



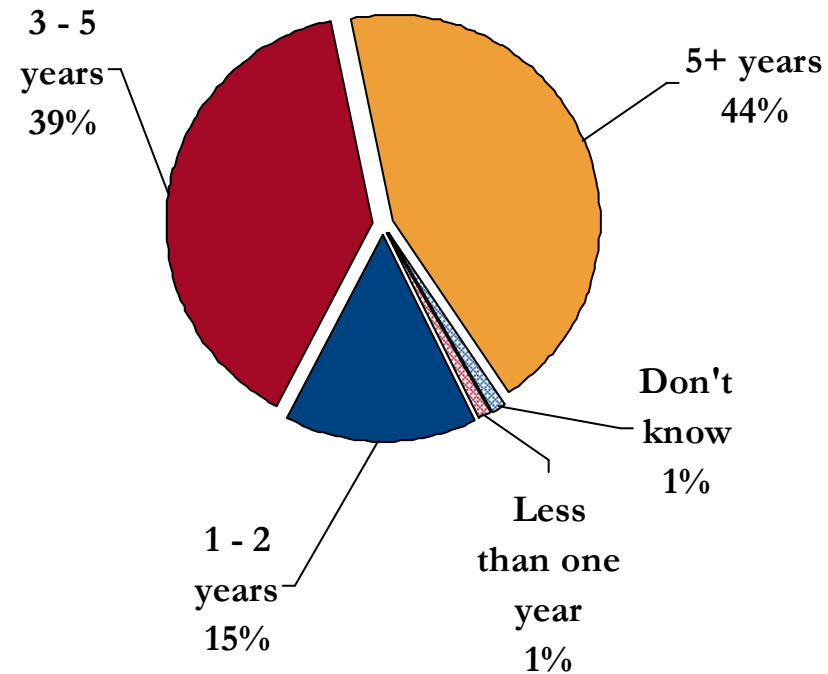
Q: How well does your current bandwidth meet your needs?  
(n=535 Ohio businesses that have broadband service)  
2009 © Connect Ohio®

# Years of Broadband Use

How long businesses have subscribed to broadband

Across Ohio, about 159,000 businesses currently subscribe to broadband service.

About 1,600 Ohio businesses subscribed to broadband within the past year.

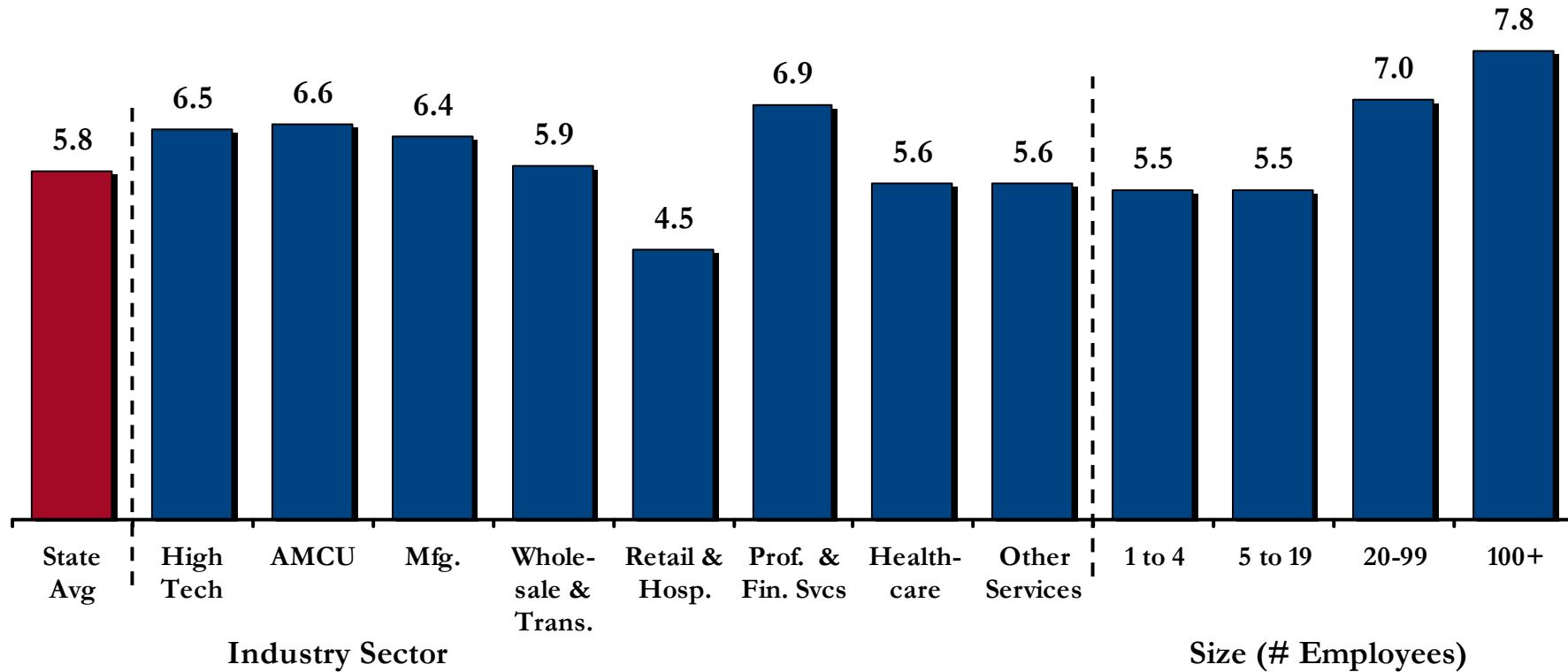


Percent of broadband-connected Ohio businesses

Q: How many years has your organization been using broadband service?  
 (n=535 Ohio businesses that have broadband service)  
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## Average Number of Years Businesses Have Been Using Broadband by Size and Industry Sector

Average number of years that businesses have used broadband for their work



Q: How many years has your organization been using broadband service?  
(n=535 Ohio businesses that have broadband service)

44

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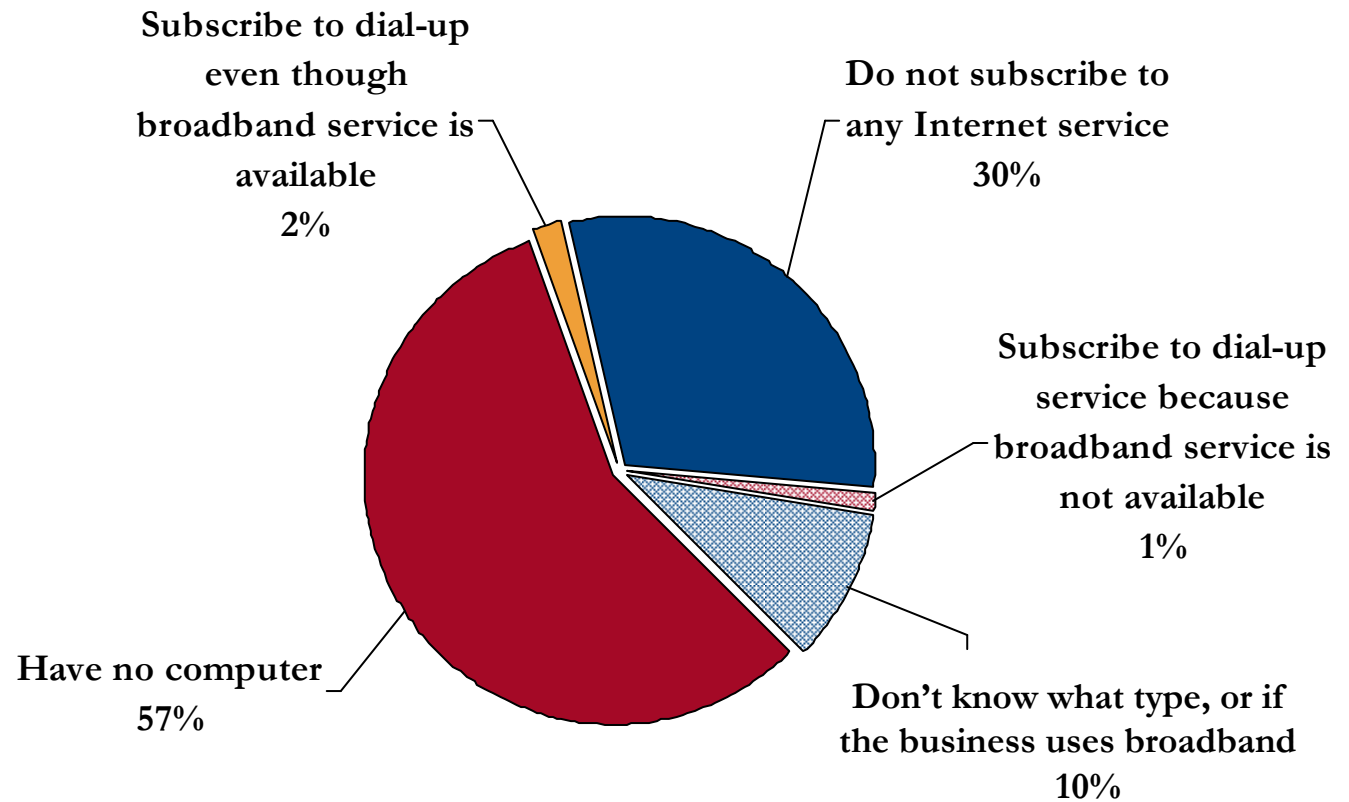
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Source: 2009 Connect Ohio®  
Business Technology Assessment  
[www.connectohio.org](http://www.connectohio.org)

# Businesses That Do Not Subscribe to Broadband

Percent of Ohio businesses that do *not* subscribe to broadband service

Nearly nine out of ten businesses with no broadband service do not have any Internet service at all, or they do not use a computer for their business.



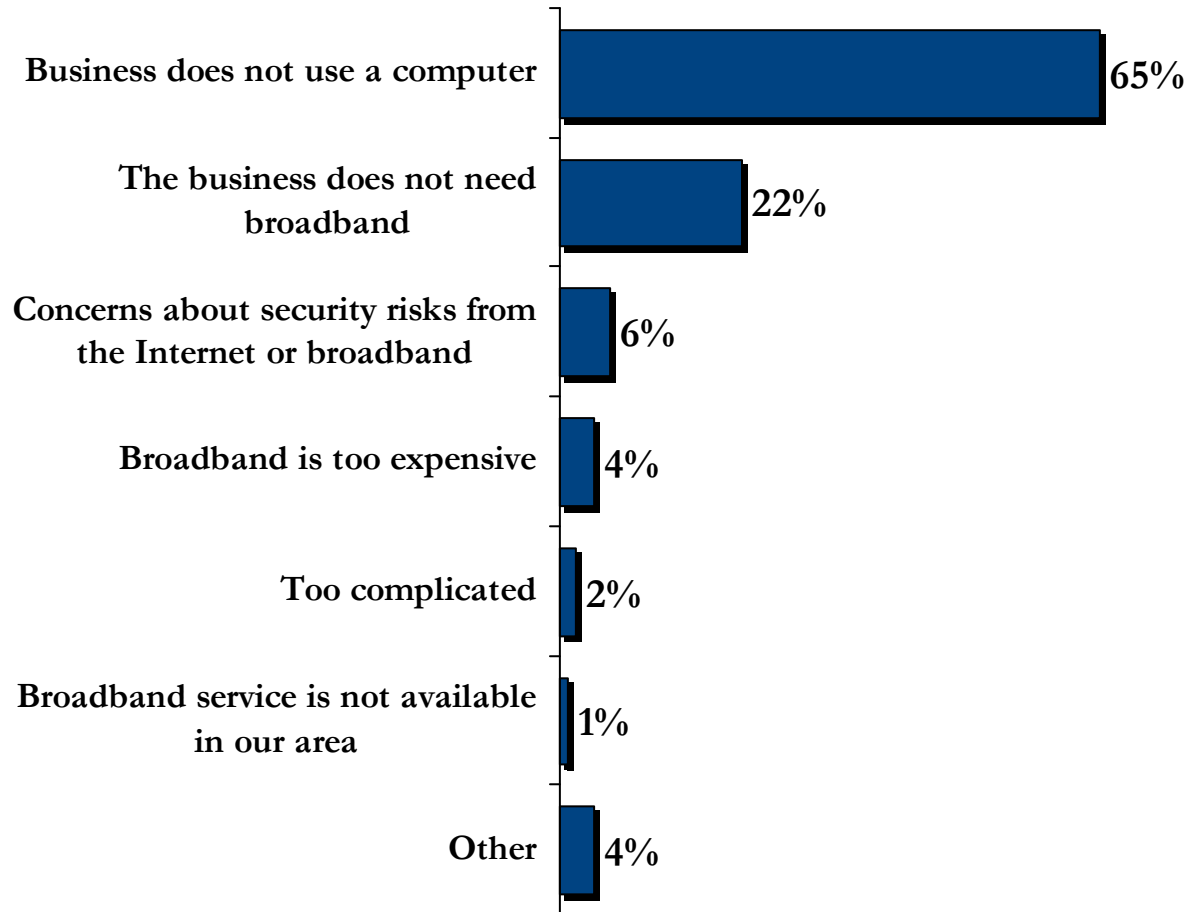
# Barriers to Broadband Adoption

Percent of Ohio businesses that do not subscribe to broadband\*

Nearly two-thirds of Ohio businesses that do not use broadband service do not use a computer.

Another 22% believe they do not need broadband service for their business.

In contrast, only 4% believe that broadband service is too expensive.



\*Percentages do not add up to 100% because businesses could give multiple responses.

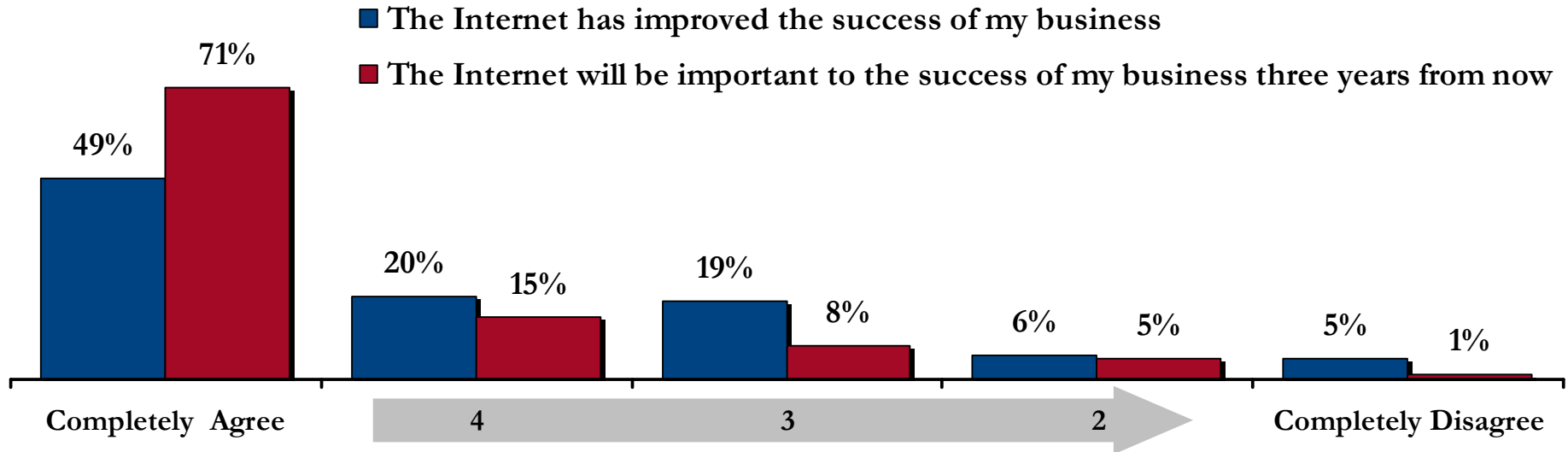
Q: Why doesn't your organization subscribe to broadband service?  
(n=232 Ohio businesses that do not subscribe to broadband)

# Technology's Impact On Competition and Success

# The Internet's Impact on Success

Nearly one-half of Ohio businesses “Completely Agree” that the Internet has already improved the success of their business. That number increases to 71% when businesses consider how important the Internet will be to their success three years from now.

On a scale from 1 to 5, with 5 being “Completely Agree” and 1 being “Completely Disagree”



Q: On a scale of 1 to 5, with 5 being completely agree and 1 being completely disagree, how much do you agree with the following statement?

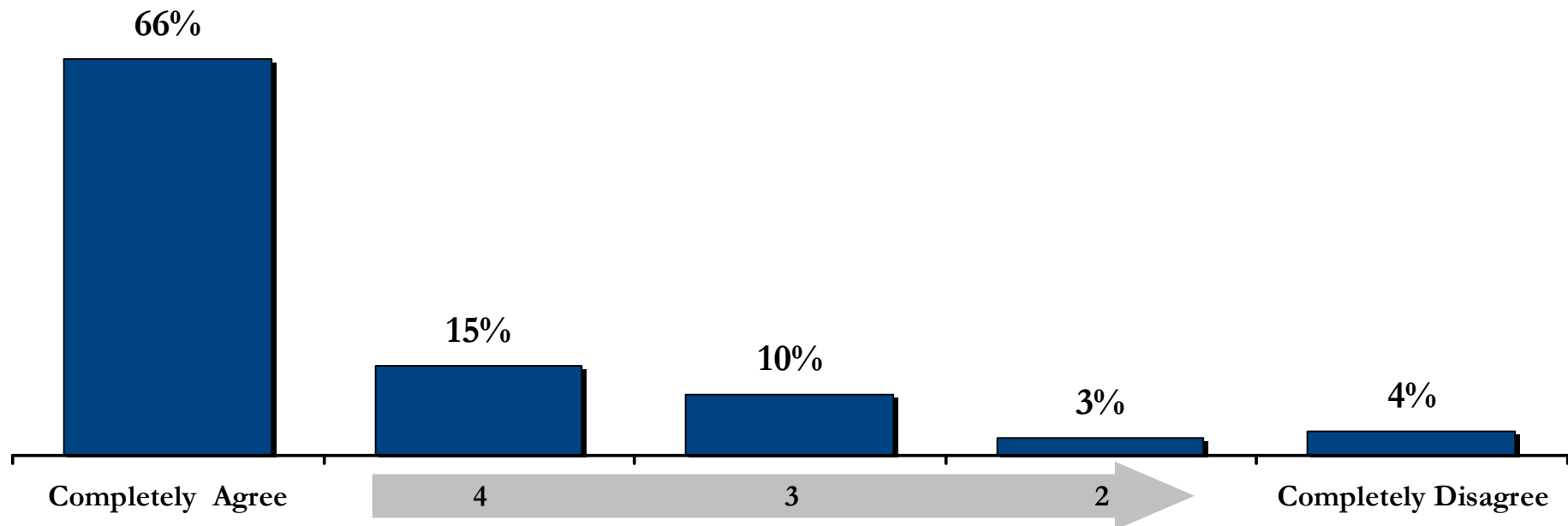
(n=578 Ohio businesses that use the Internet)

2009 © Connect Ohio®

## Broadband's Impact on Competition

Nearly two-thirds of all Internet-connected businesses “Completely Agree” that they need broadband to compete in today’s global economy.

On a scale from 1 to 5, with 5 being “Completely Agree” and 1 being “Completely Disagree”  
“Businesses need broadband in order to compete in today’s economy”



Q: On a scale of 1 to 5, with 5 being completely agree and 1 being completely disagree, how much do you agree with the following statement?

(n=578 Ohio businesses that use the Internet)

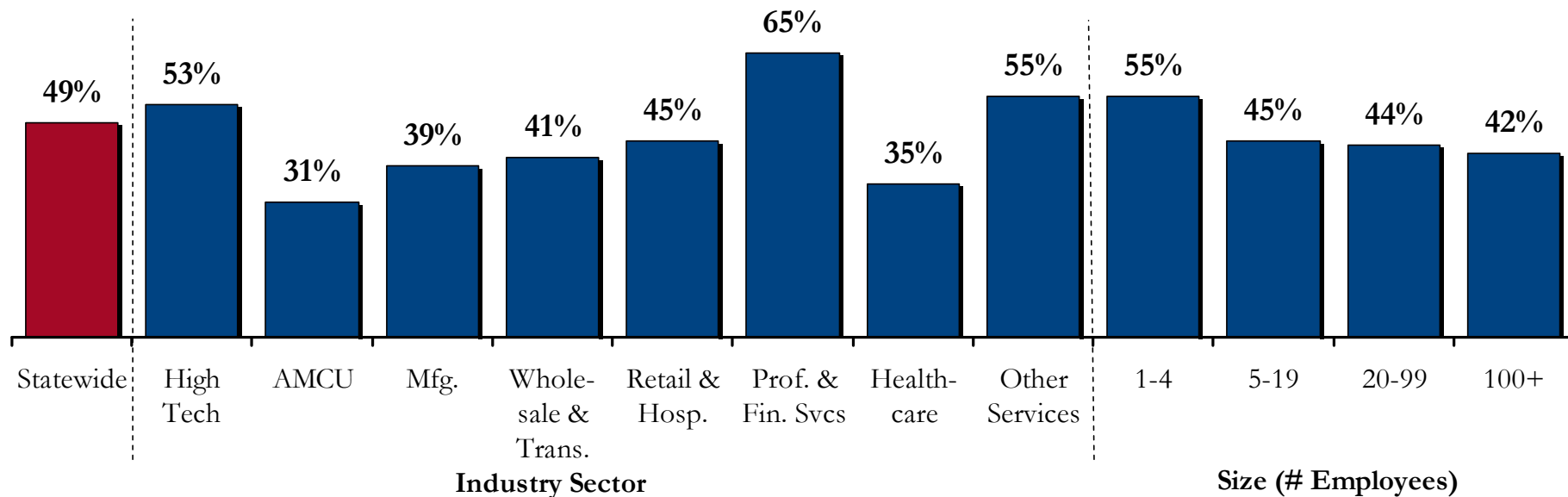
2009 © Connect Ohio®

# The Internet's Current Impact on Success

Businesses in the Professional/Finance sector are significantly more likely to appreciate the Internet's positive impact on business success than the state average.

Small businesses are more likely to see the positive impact of broadband on their success.

Percent of businesses that use the Internet and "Completely Agree" with the statement: "The Internet has improved the success of my business"



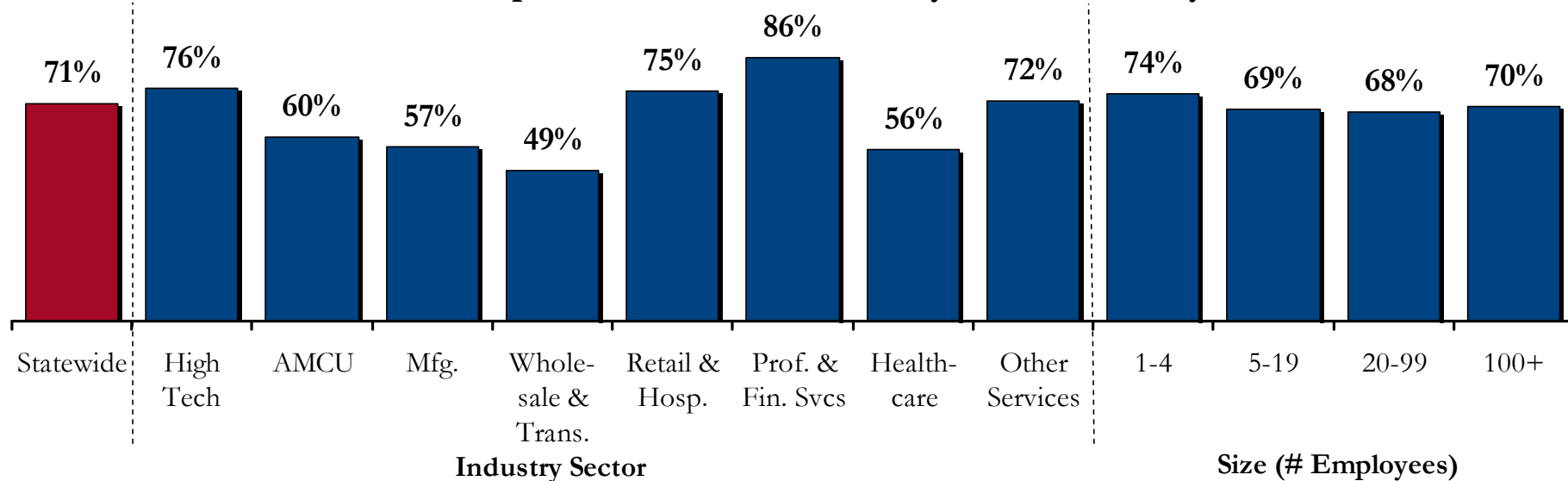
Q: On a scale of 1 to 5, with 5 being completely agree and 1 being completely disagree, how much do you agree with the following statement?  
(n=578 Ohio businesses that use the Internet)

# The Internet's Future Impact on Success

Businesses in the Wholesale Trade/Transport/Warehousing sector are less likely to believe that the Internet will be important to success in the near future.

Companies of all sizes have a positive outlook regarding the Internet's impact on future business.

Percent of businesses that use the Internet and "Completely Agree" with the statement:  
"The Internet will be important to the success of my business three years from now"

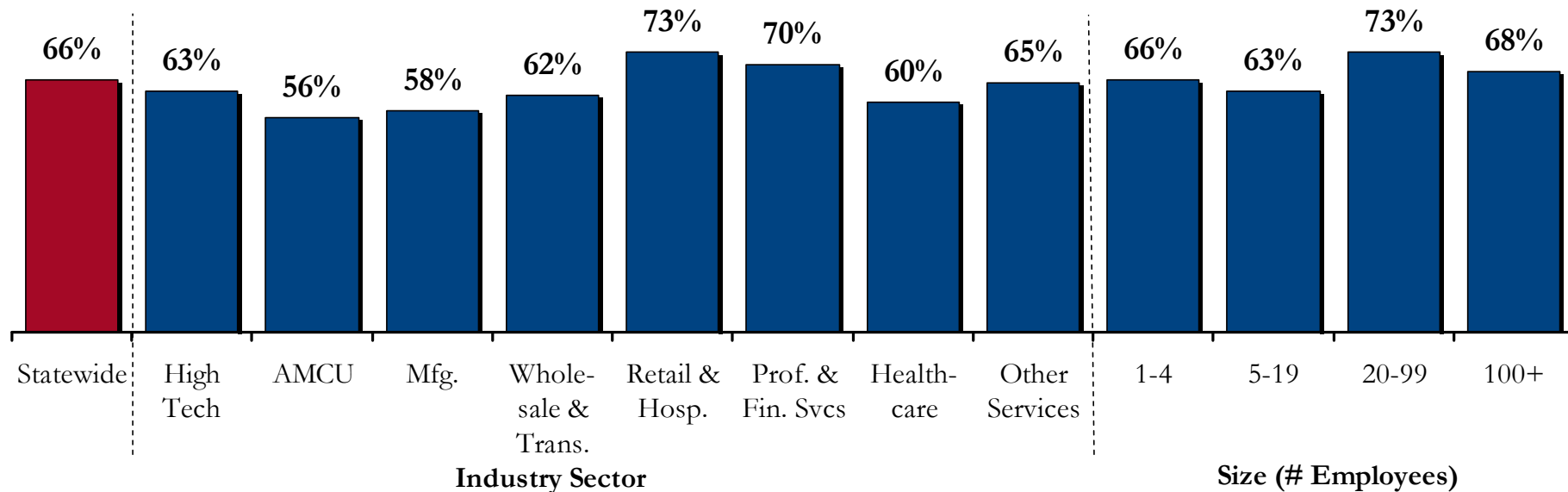


Q: On a scale of 1 to 5, with 5 being completely agree and 1 being completely disagree, how much do you agree with the following statement?  
(n=578 Ohio businesses that use the Internet)  
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# Broadband's Impact on Competition by Business Size and Sector

Businesses in the Retail/Hospitality sector are more likely to agree that businesses need broadband to compete in today's economy. This suggests that retail/hospitality businesses are the least likely to adopt broadband; however, once they do adopt, they see greater competitive benefits than any other sector.

Percent of businesses that use the Internet and "Completely Agree" with the statement:  
"Businesses need broadband in order to compete in today's economy"

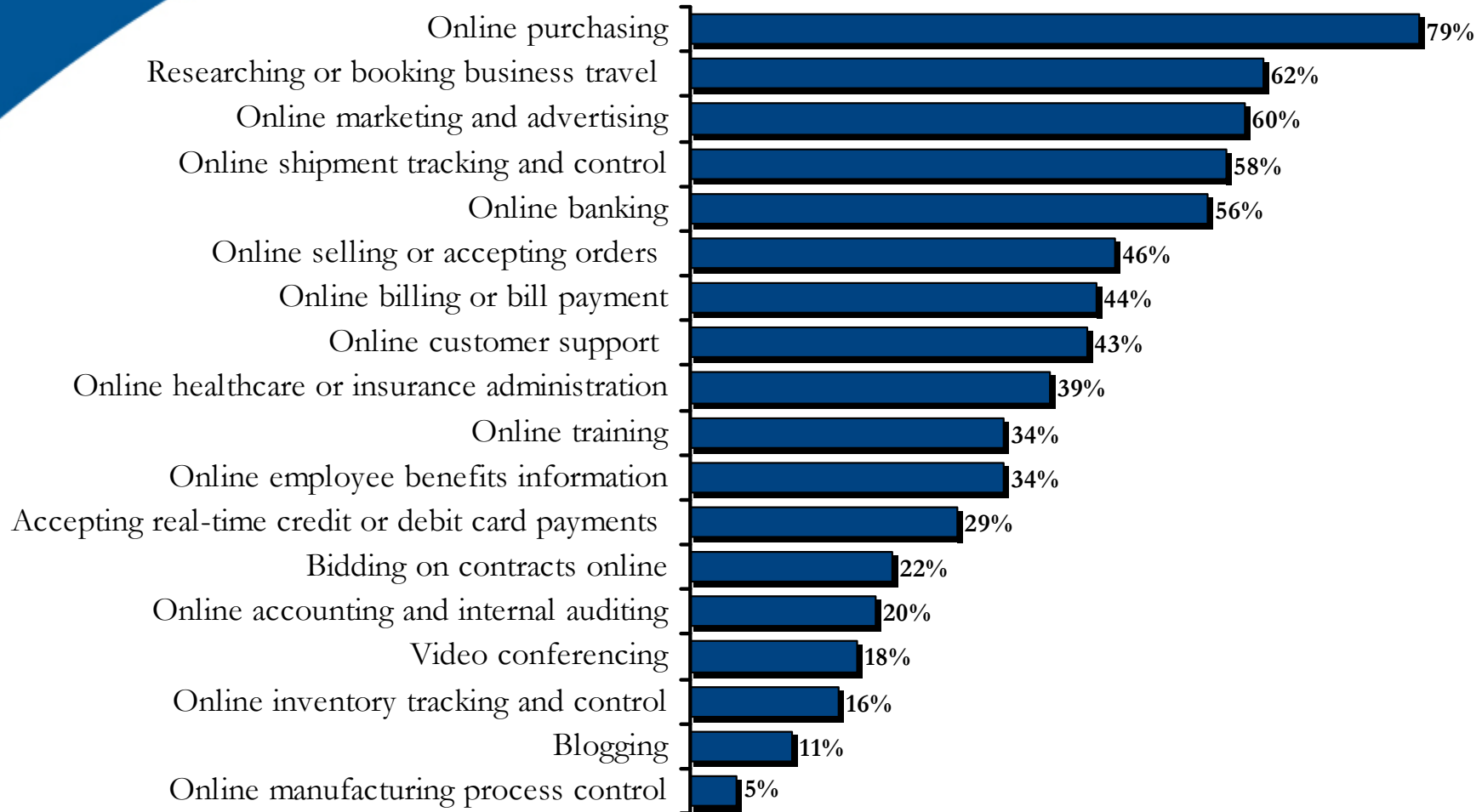


Q: On a scale of 1 to 5, with 5 being completely agree and 1 being completely disagree, how much do you agree with the following statement?  
(n=578 Ohio businesses that use the Internet)

# Uses for the Internet

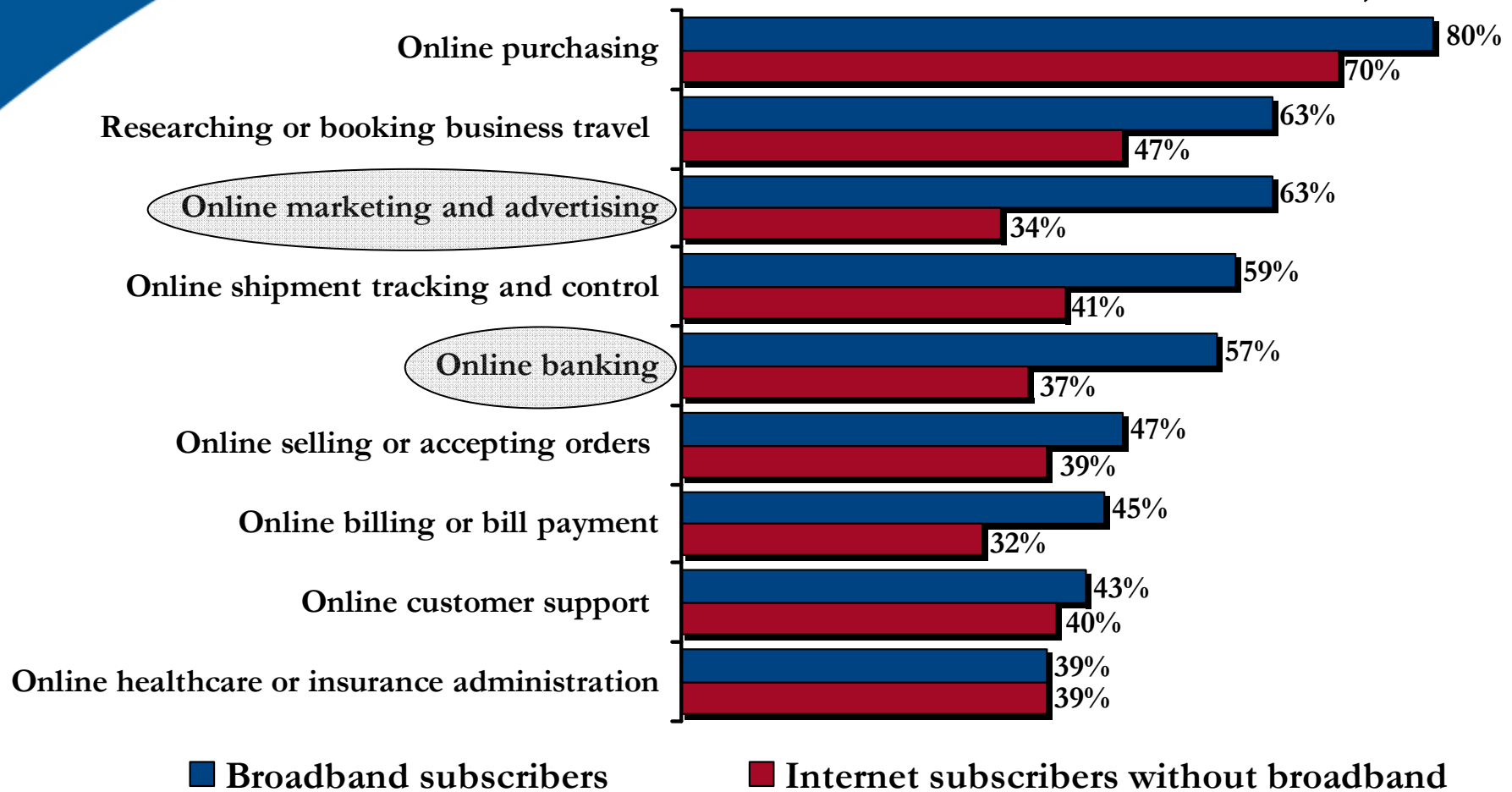
# Internet Applications

**Internet-connected businesses that use the following applications:**



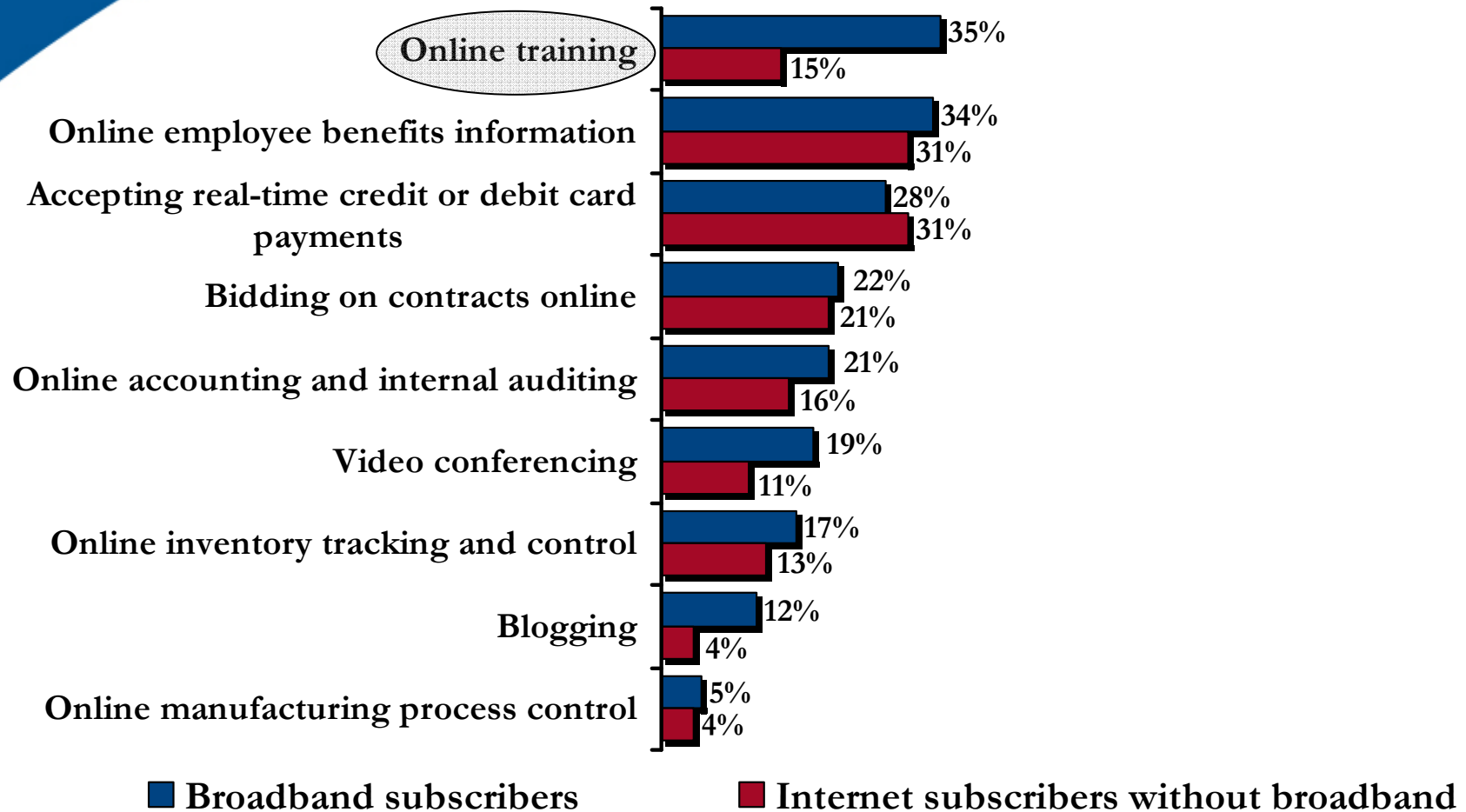
Q: Which of the following does your business currently use?  
(n=578 Ohio businesses that use the Internet)

## Internet Applications (Broadband Adopters Compared to Other Internet Subscribers, Slide 1 of 2)



Q: Which of the following does your business currently use?  
(n=578 Ohio businesses that use the Internet)  
2009 © Connect Ohio®

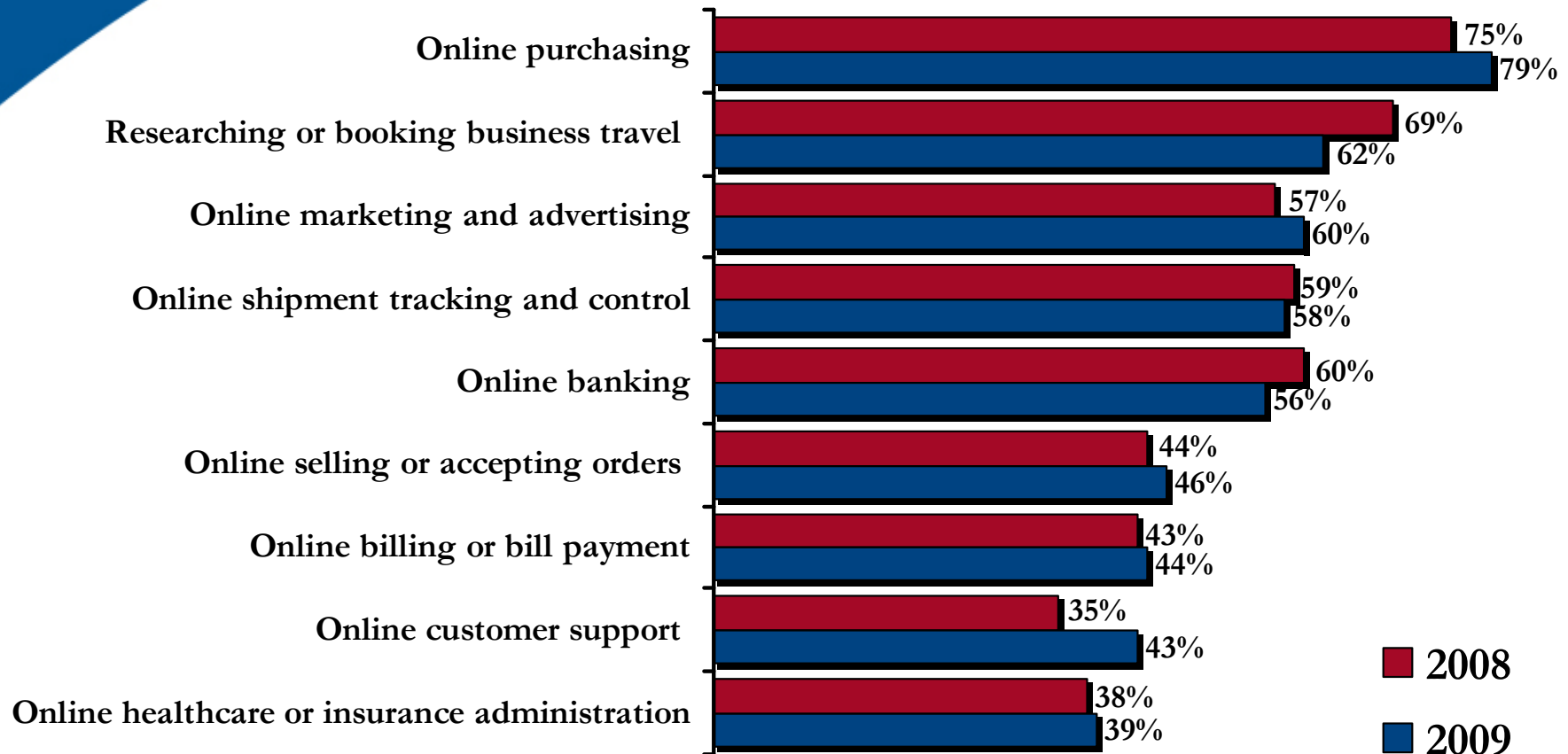
## Internet Applications (Broadband Adopters Compared to Other Internet Subscribers, Slide 2 of 2)



Q: Which of the following does your business currently use?  
(n=578 Ohio businesses that use the Internet)  
2009 © Connect Ohio®

# Internet Application Trends

(Slide 1 of 2)



Q: Which of the following does your business currently use?

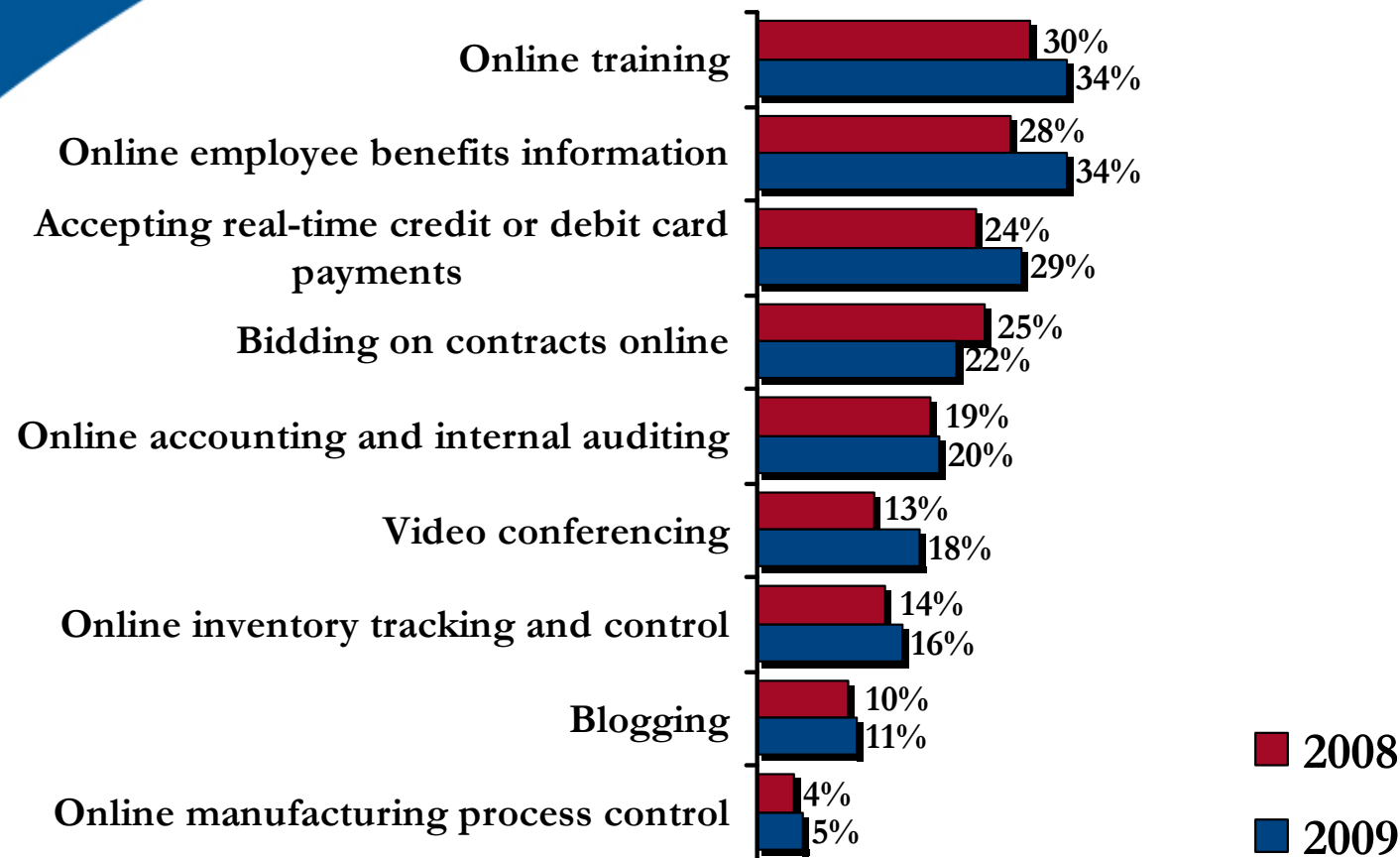
2008: (n=588 Ohio businesses that use the Internet)

2009: (n=578 Ohio businesses that use the Internet)

2009 © Connect Ohio®

# Internet Application Trends

(Slide 2 of 2)



Q: Which of the following does your business currently use?

2008: (n=588 Ohio businesses that use the Internet)

2009: (n=578 Ohio businesses that use the Internet)

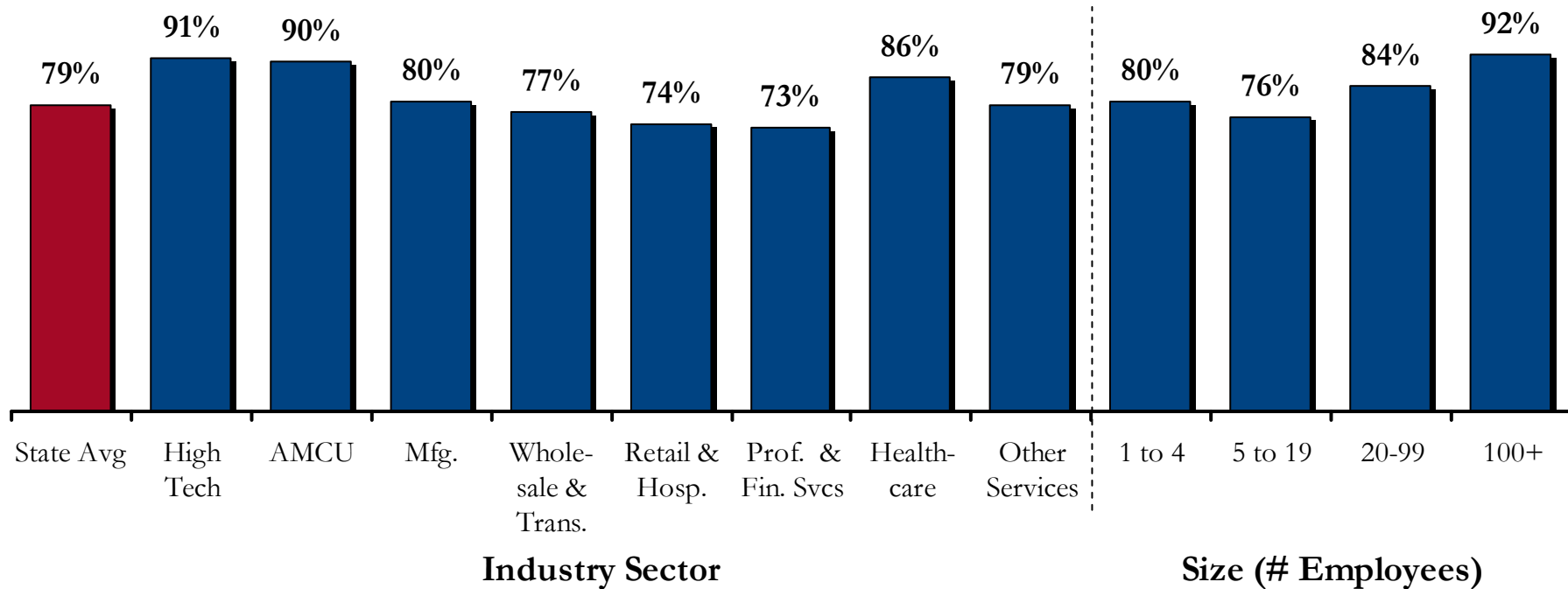
2009 © Connect Ohio®

# Online Purchasing or Ordering

Businesses in the High Tech industry sector are the most likely to use the Internet to buy or order goods.

Larger businesses are more likely than smaller companies to purchase or order goods online.

Current Adoption by Size and Industry Sector



Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Researching or Booking Business Travel Arrangements Online

Businesses in the High Tech industry sector are the most likely to use the Internet to research or book business travel, while the Retail/Hospitality industry sector is the least likely to do so.

Larger businesses are more likely to research or book business travel.

Current Adoption by Size and Industry Sector



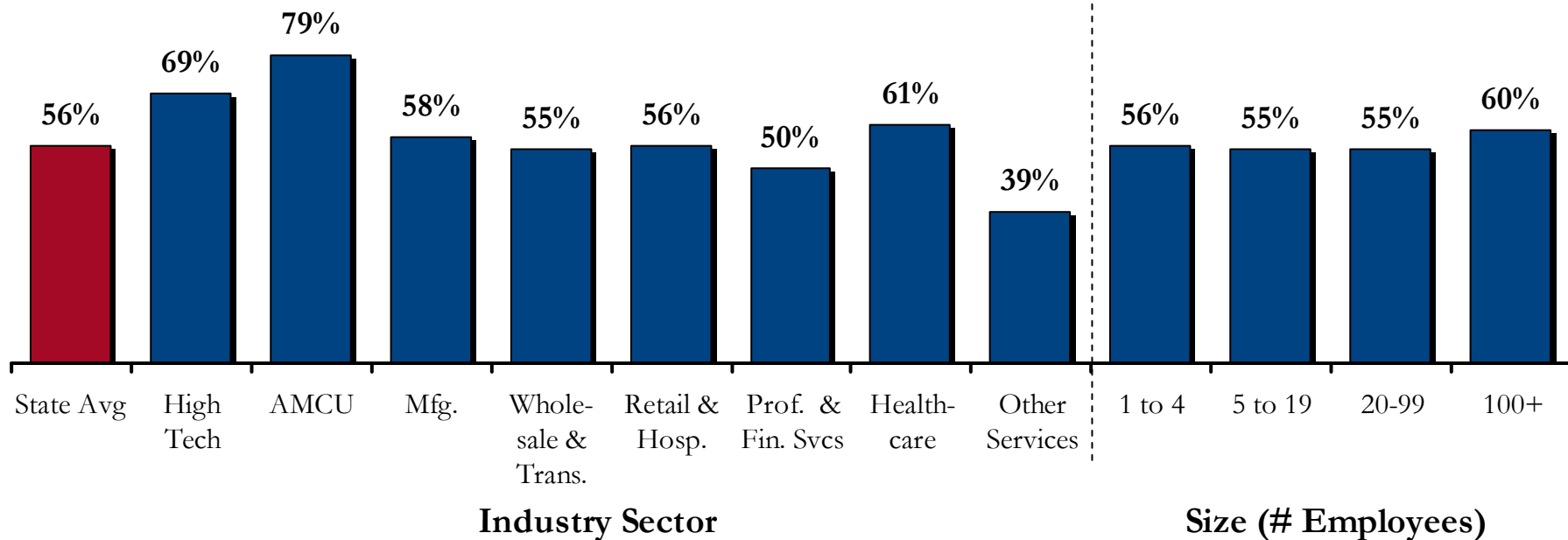
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Online Banking

Businesses in the Agriculture/Mining/Construction/Utility industry sector are significantly more likely to use the Internet to do online banking.

More than one-half of businesses in every size category bank online.

Current Adoption by Size and Industry Sector



Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Online Shipment Tracking and Control

Businesses in the Manufacturing and High Tech industry sectors are the most likely to go online to track and control shipping.

Larger businesses are more likely to track shipping online.

Current Adoption by Size and Industry Sector



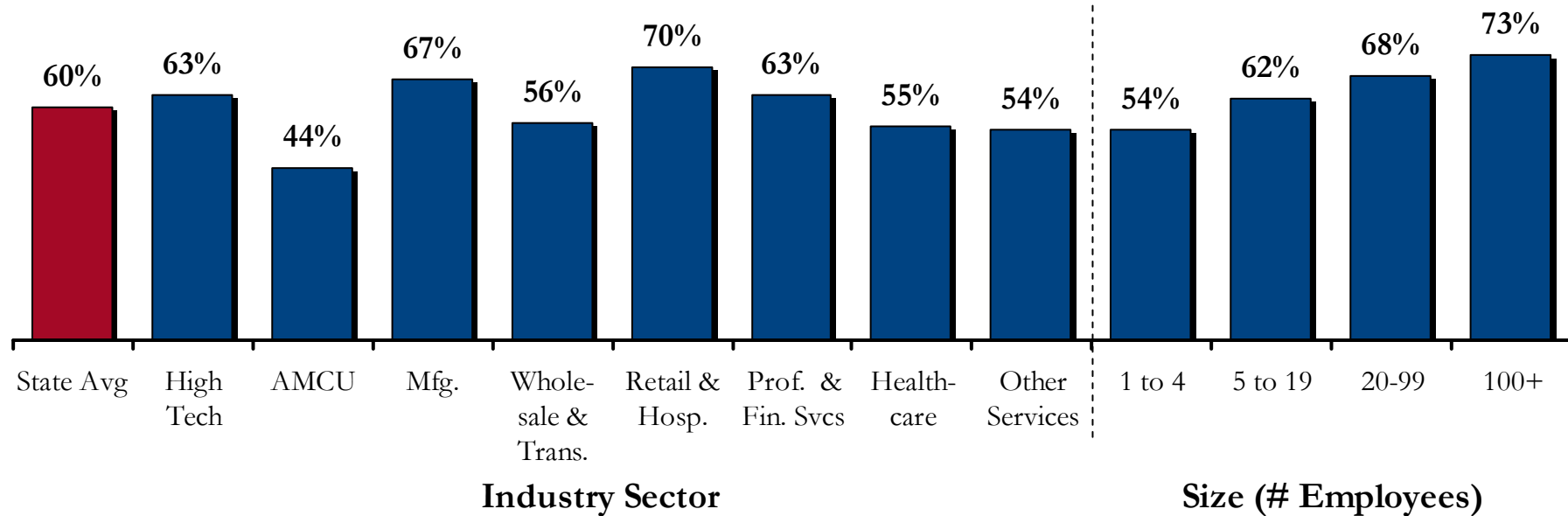
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Online Marketing and Advertising

Businesses in the Manufacturing and Retail/Hospitality industry sectors are the most likely to advertise online.

Businesses become more likely to advertise online as company size grows.

Current Adoption by Size and Industry Sector



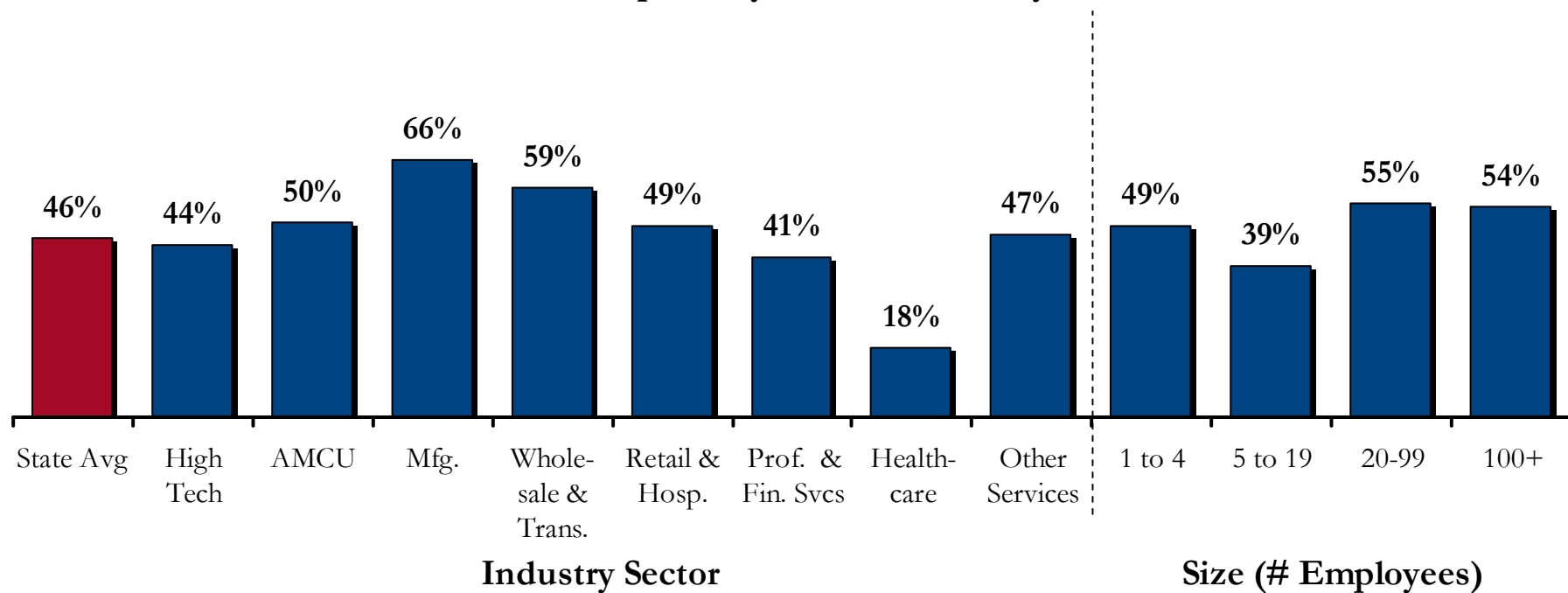
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Online Selling or Accepting Orders Online

More than one-half of the businesses in the Manufacturing and Wholesale Trade/Transport/Warehousing industry sectors sell or accept orders for products online, while fewer than one-fifth of companies in the Healthcare sector do so.

Larger businesses are more likely to sell or accept orders for goods and services online.

Current Adoption by Size and Industry Sector



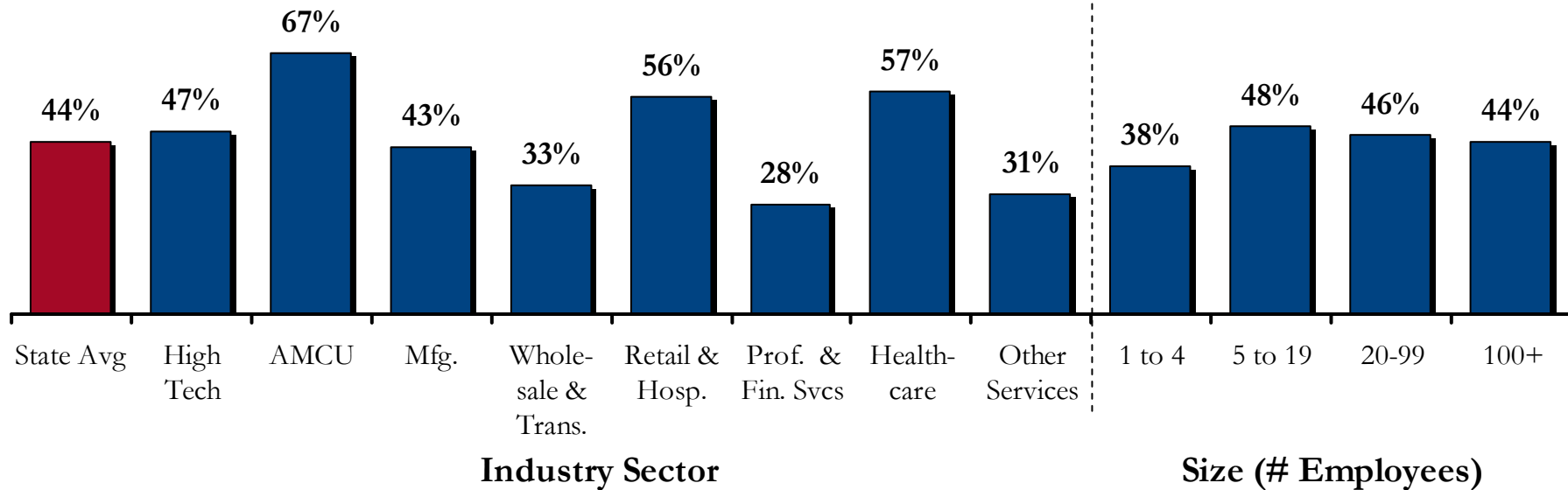
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Online Billing or Bill Payment

Businesses in the Agriculture/Mining/Construction/Utility industry sector are the most likely to use the Internet for online billing or accepting bill payments.

There is very little variance among companies of different sizes in accepting bill payments online.

Current Adoption by Size and Industry Sector



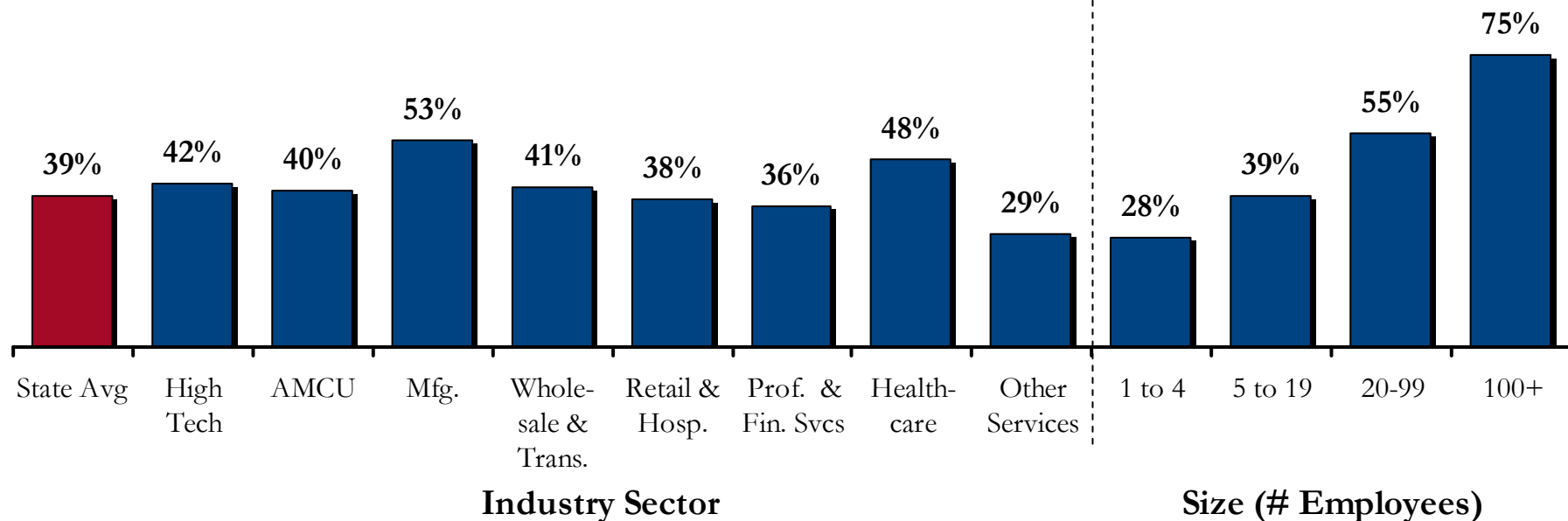
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Online Administration With Healthcare Insurance Companies

Businesses in the Manufacturing and Healthcare industry sectors are the most likely to offer online administration with health insurance companies.

While fewer than thirty percent of Ohio's smallest businesses offer online healthcare insurance administration, three-fourths of the state's largest businesses offer this service.

Current Adoption by Size and Industry Sector



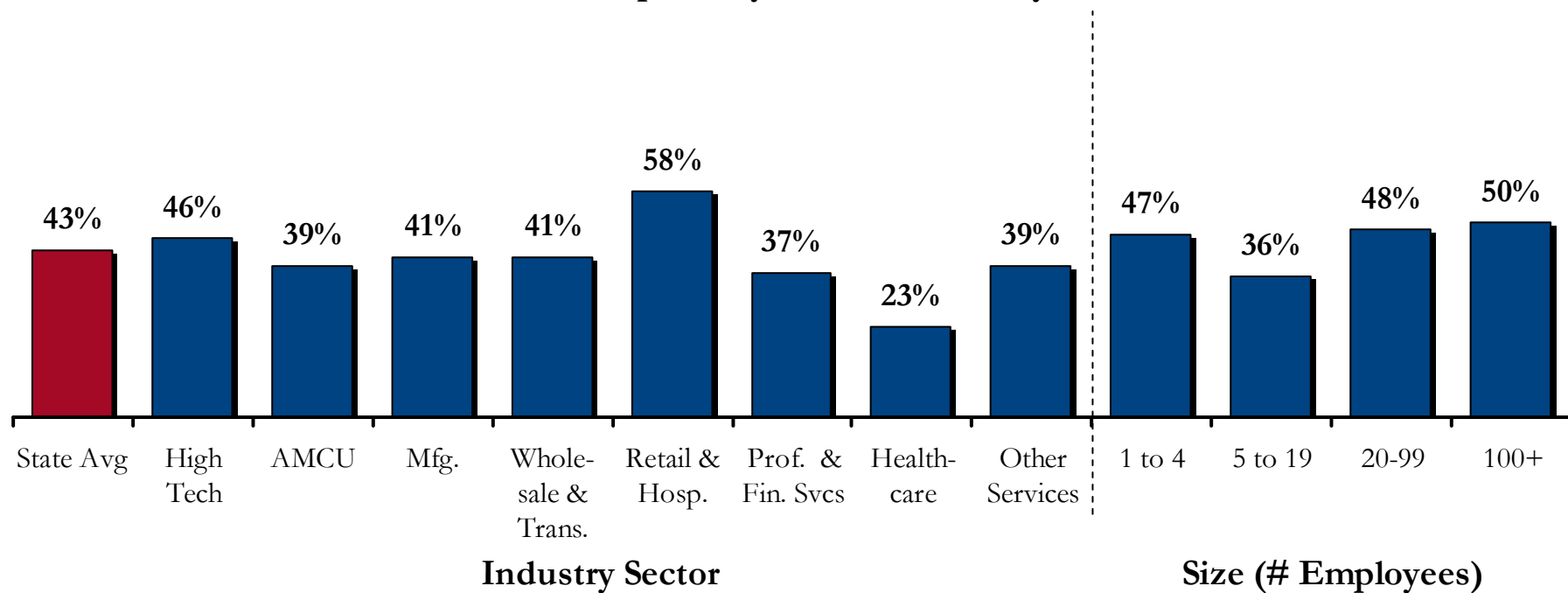
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Online Customer Support

More than one-half the businesses in the Retail/Hospitality industry sector offer online customer support, whereas fewer than one-fourth of businesses in the Healthcare industry offer this service.

There is very little variance among companies of different sizes in the use of the Internet to offer online customer support.

Current Adoption by Size and Industry Sector



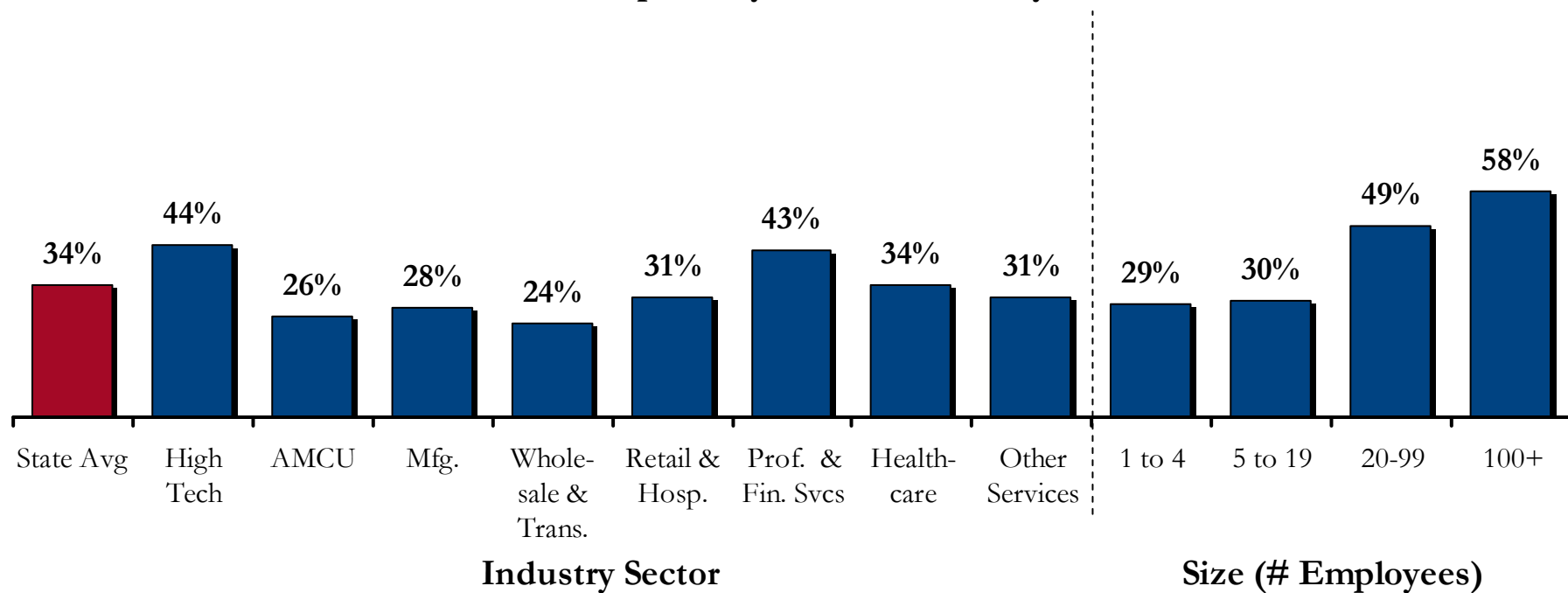
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Online Training

Businesses in the High Tech and Professional/Finance industry sectors are the most likely to provide online training.

Businesses with more than 100 employees are twice as likely to offer online training than small businesses with fewer than five employees.

Current Adoption by Size and Industry Sector



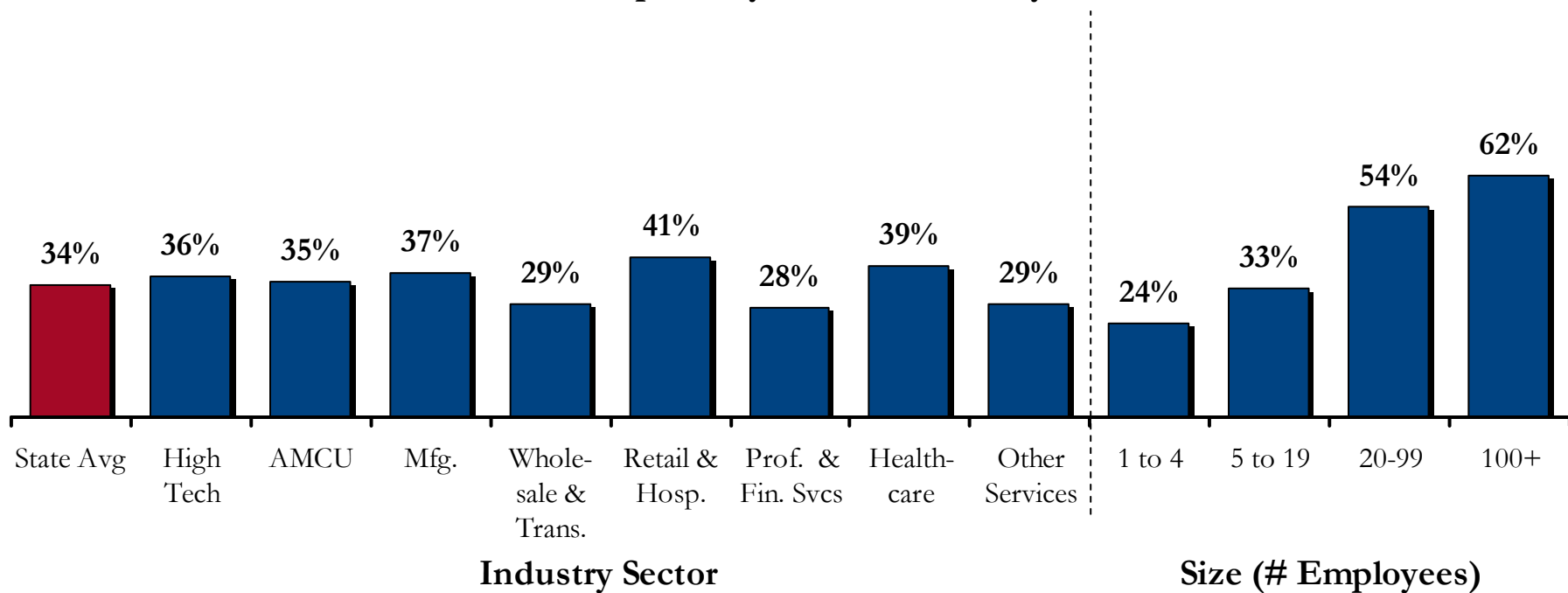
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Online Employee Benefits Information

Businesses in the Retail/Hospitality industry sector are the most likely to offer employee benefit information online, followed by businesses in the Healthcare industry sector.

Businesses with more than 100 employees are more than twice as likely to offer online employee benefit information than small businesses with fewer than five employees.

Current Adoption by Size and Industry Sector



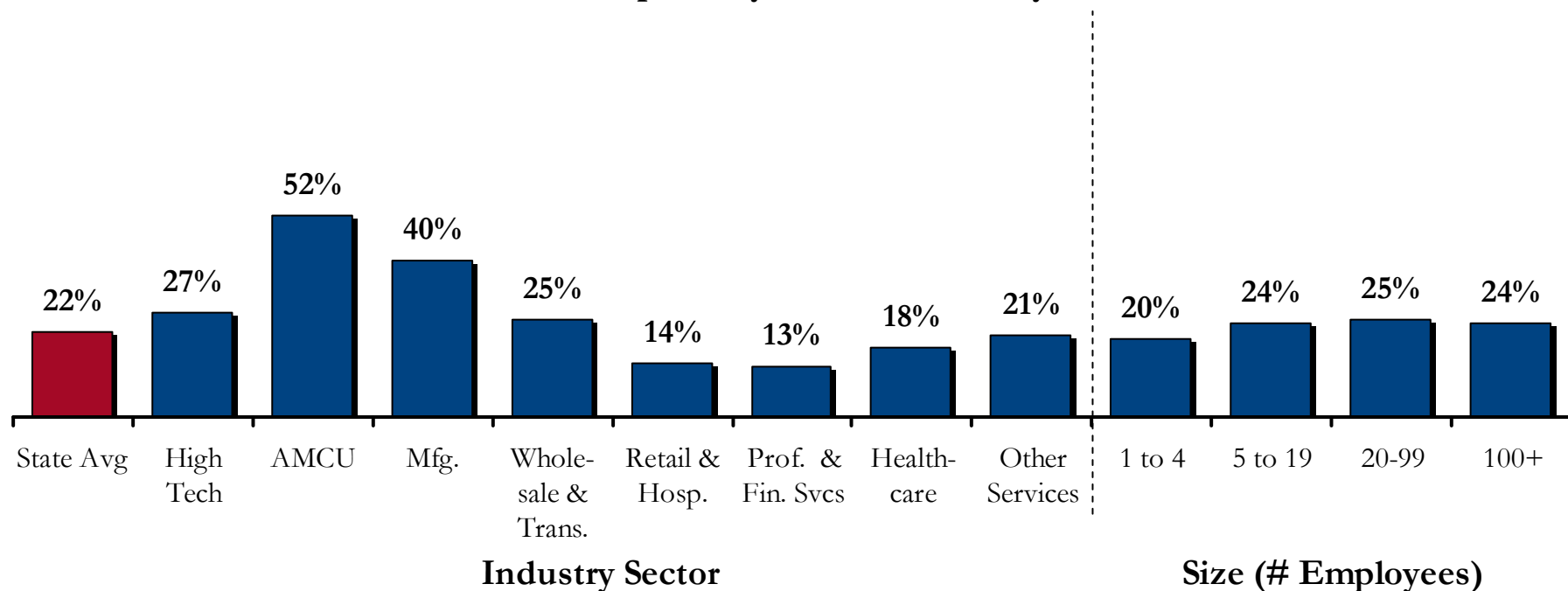
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Bidding on Contracts Online

Businesses in the Agriculture/Mining/Construction/Utility industry sector are the most likely to bid on contracts online, while businesses in the Professional/Finance sector are the least likely to do so.

Bidding on contracts online does not vary significantly by business size.

Current Adoption by Size and Industry Sector



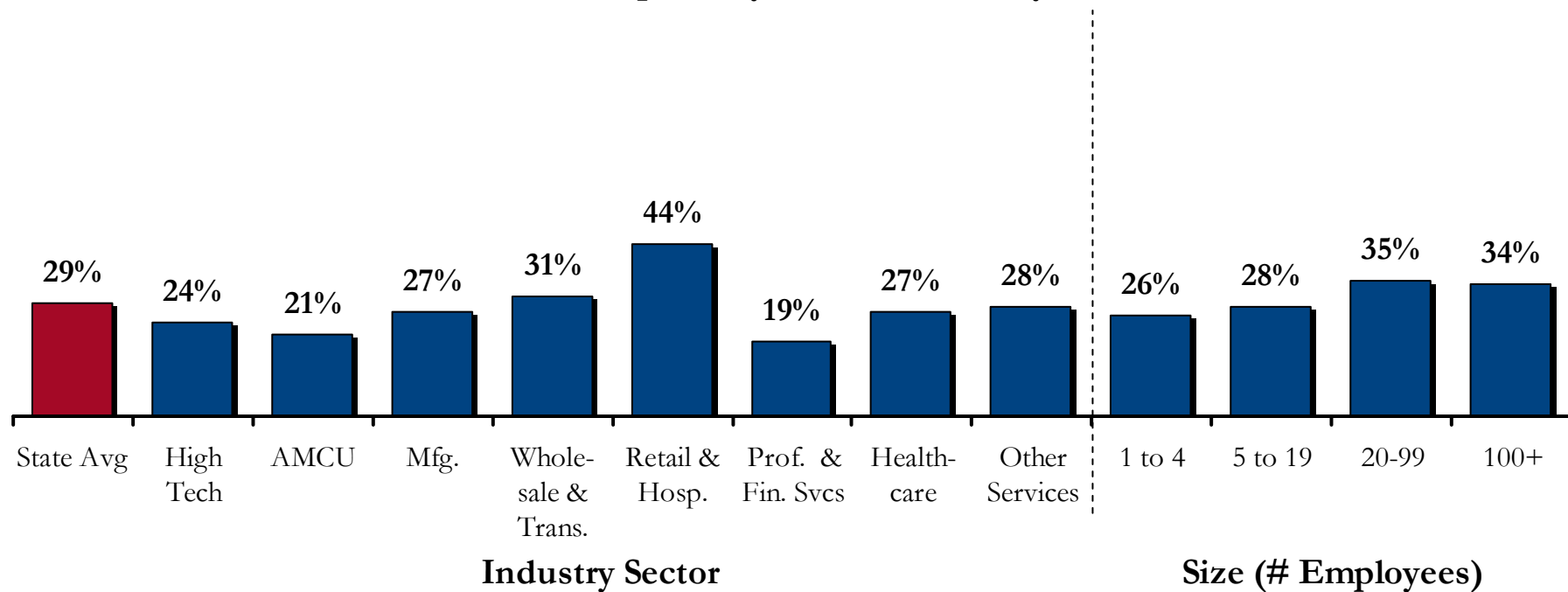
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Accepting Real Time Credit or Debit Card Payments

Businesses in the Retail/Hospitality sector are more likely than the state average to accept credit or debit card payments online.

Smaller businesses are less likely than larger ones to bid on contracts online.

Current Adoption by Size and Industry Sector



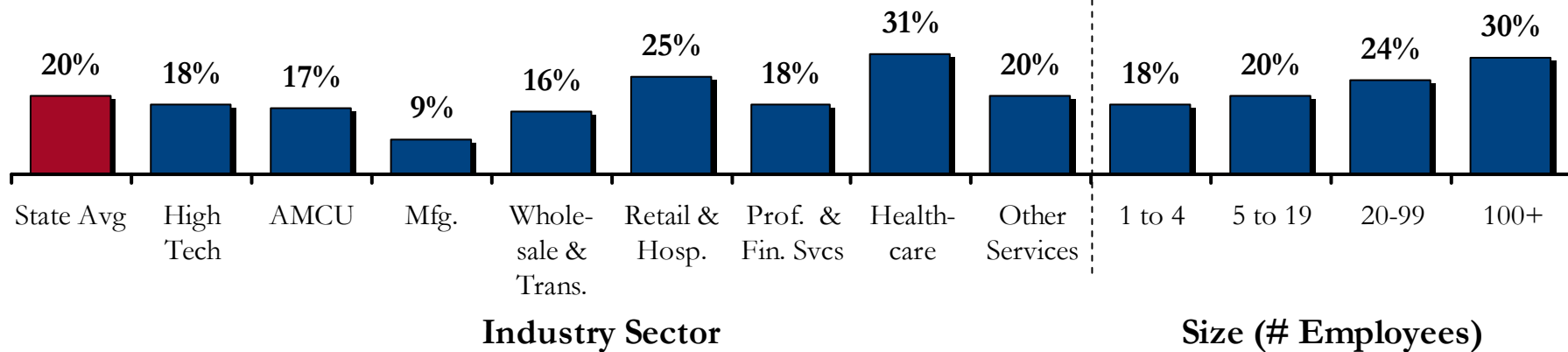
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Online Accounting and Internal Auditing

Businesses in the Healthcare and Retail/Hospitality industry sectors are the most likely to use the Internet for online accounting and auditing.

Larger businesses are more likely to rely on online accounting or auditing.

Current Adoption by Size and Industry Sector



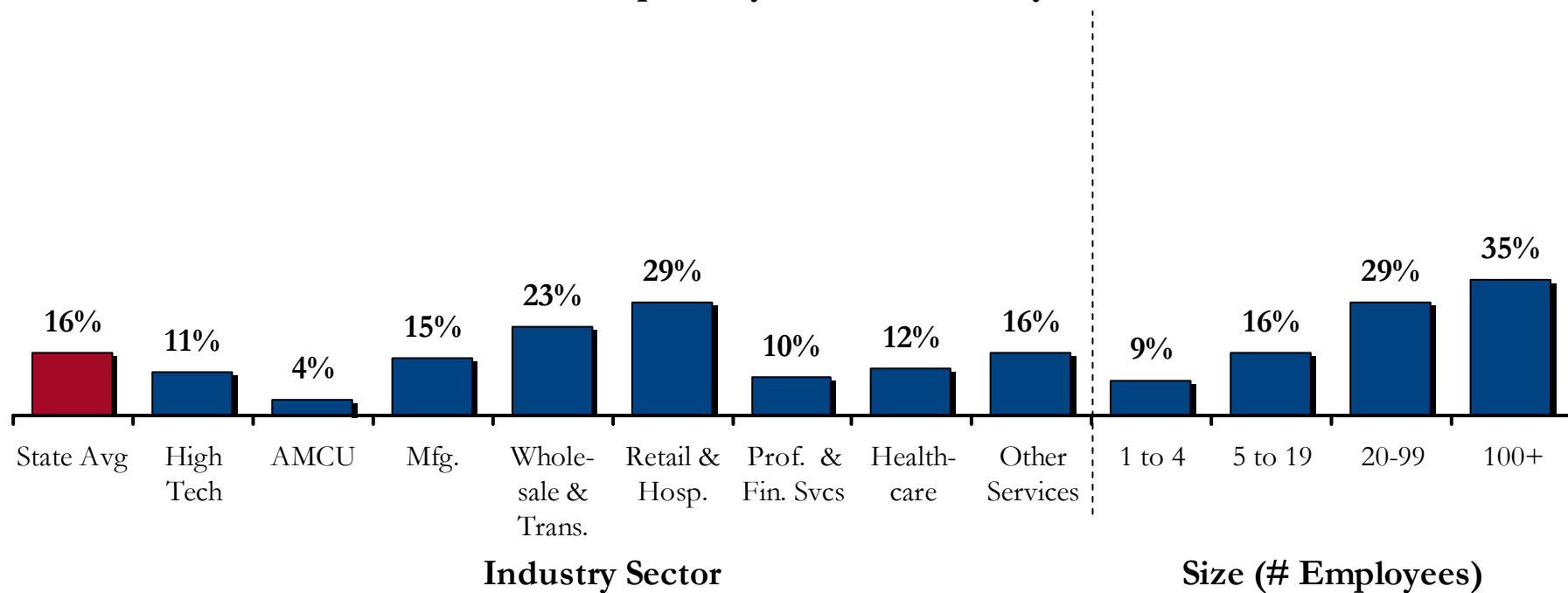
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Online Inventory Tracking and Control

Businesses in the Retail/Hospitality and Wholesale Trade/Transportation industry sectors are the most likely to use the Internet for inventory tracking and control.

The use of online inventory and tracking control increases among larger businesses.

Current Adoption by Size and Industry Sector



Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Video Conferencing

Businesses in the High Tech industry sector are more likely to use the Internet for video conferencing.

Businesses with more than 100 employees are more than twice as likely to use the Internet for video conferencing than the state average.

Current Adoption by Size and Industry Sector



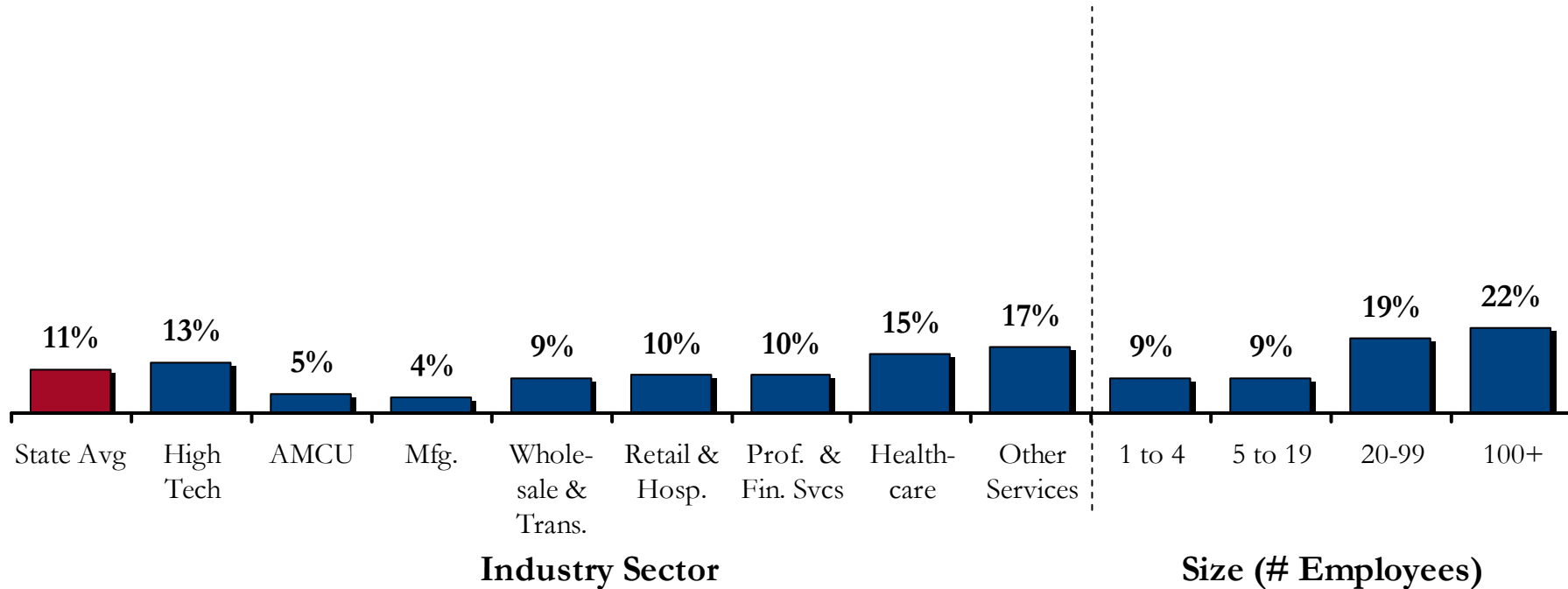
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Blogging

**Businesses in the Healthcare and Other Services industry sectors are the most likely to maintain a blog.**

**Businesses with more than 100 employees are twice as likely to use the Internet for blogging compared to the state average.**

**Current Adoption by Size and Industry Sector**



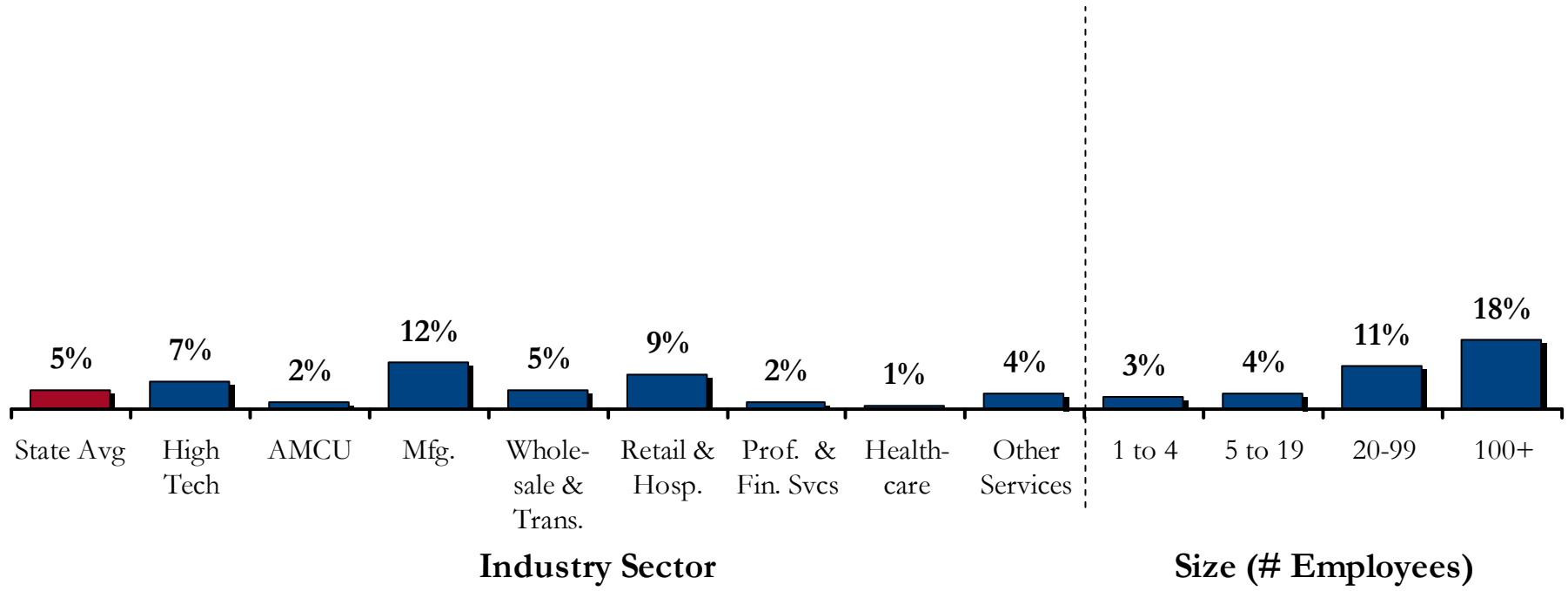
Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
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# Online Manufacturing Process Control

Businesses in the Manufacturing industry sector are more than twice as likely to control manufacturing processes online than the state average.

Larger companies are also more likely to use this Internet application than smaller companies.

Current Adoption by Size and Industry Sector

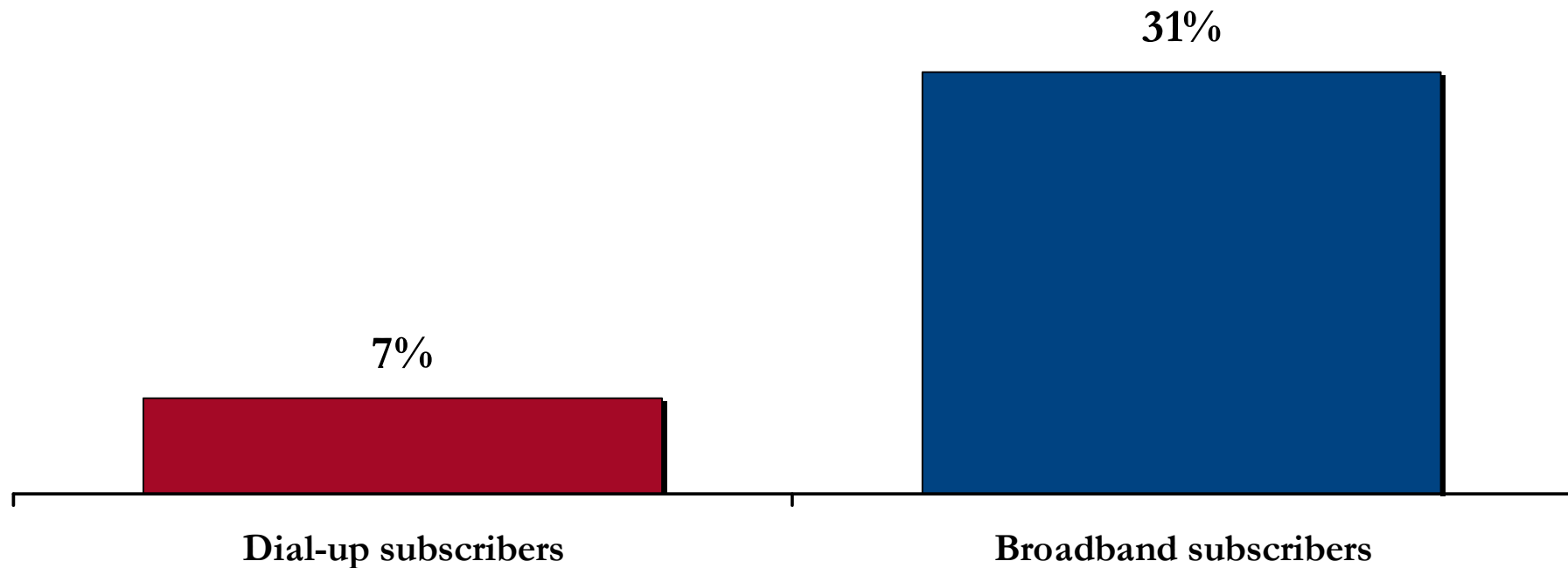


Q: Which of the following does your business currently use?  
 (n=578 Ohio businesses that use the Internet)  
 2009 © Connect Ohio®

# Technology's Impact on the Workplace

## Online Sales (Broadband vs. Dial-Up Subscribers)

Internet-connected businesses  
that receive revenues from online sales



Q: What percentage of your company's total sales revenue takes place online?  
(n=578 Ohio business that use the Internet)  
2009 © Connect Ohio®

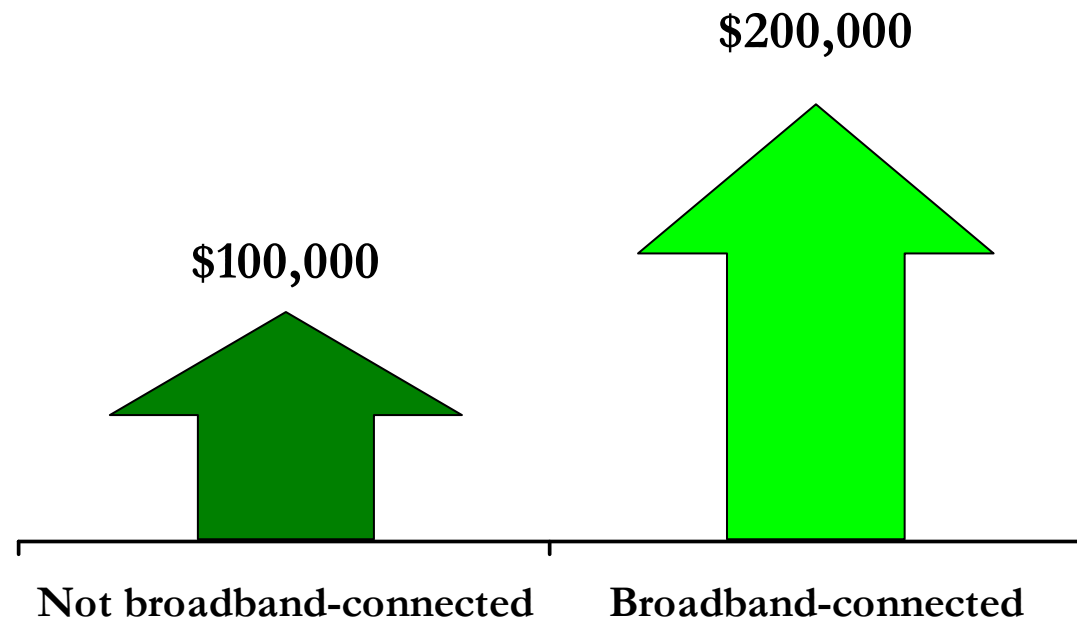
78  
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Source: 2009 Connect Ohio®  
Business Technology Assessment  
[www.connectohio.org](http://www.connectohio.org)

## Trends in Median Revenues By Broadband Adoption

Increase in median revenues  
(2008-2009):

Despite the difficult economic times, the median revenues among broadband-connected businesses grew twice as fast as those that do not use broadband.



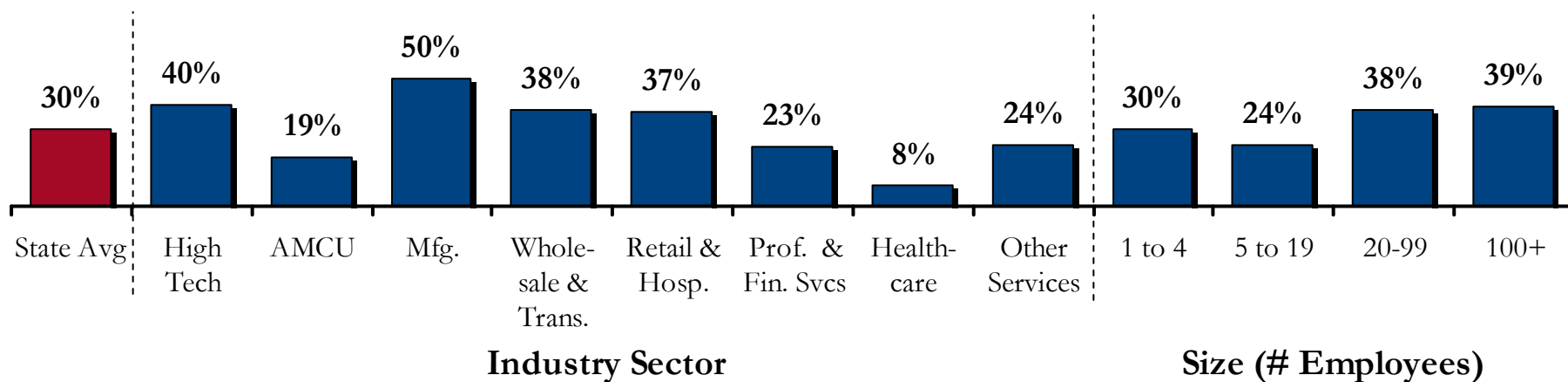
Q: What is your firm's approximate average annual revenue?  
(n=807 Ohio businesses in 2008 and  
n=802 Ohio businesses in 2009)  
2009 © Connect Ohio®

# Businesses That Earn Income From Online Sales by Business Size and Sector

Internet-connected businesses in the Manufacturing industry sector are the most likely to report earnings from online sales, while the Healthcare industry is the least likely to use this online application.

On average, larger businesses are more likely to earn revenues from online sales than smaller businesses.

Internet-connected businesses that earn revenues from online sales



Q: What percentage of your company's total sales revenue takes place online?  
 (n=578 Internet-connected Ohio business)  
 2009 © Connect Ohio®

# Technology Adoption and Total Revenues

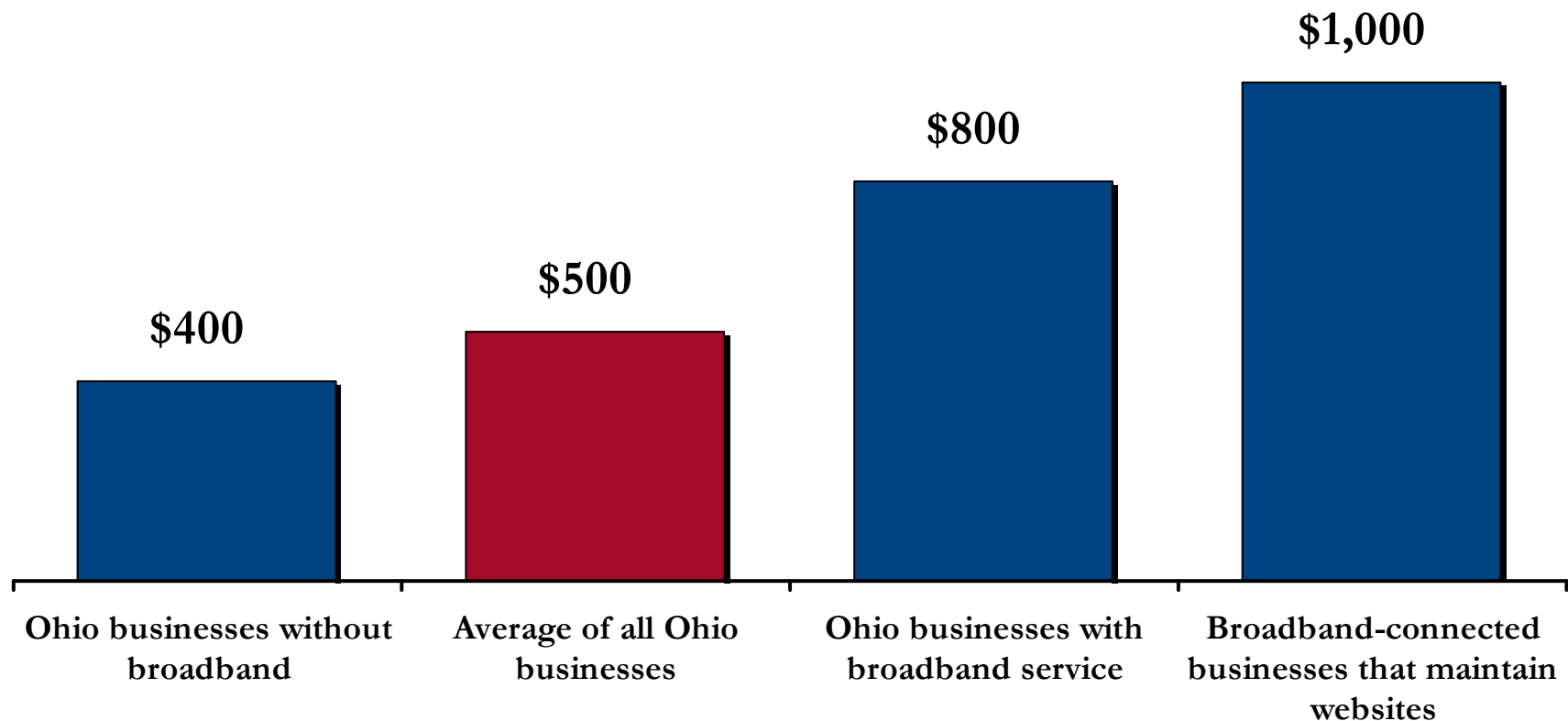
Median annual revenues (\$000) among businesses that use each application



Q: What is your firm's approximate average annual revenue?  
 (n=802 Ohio businesses)  
 2009 © Connect Ohio®

# Technology Adoption and Business Revenues

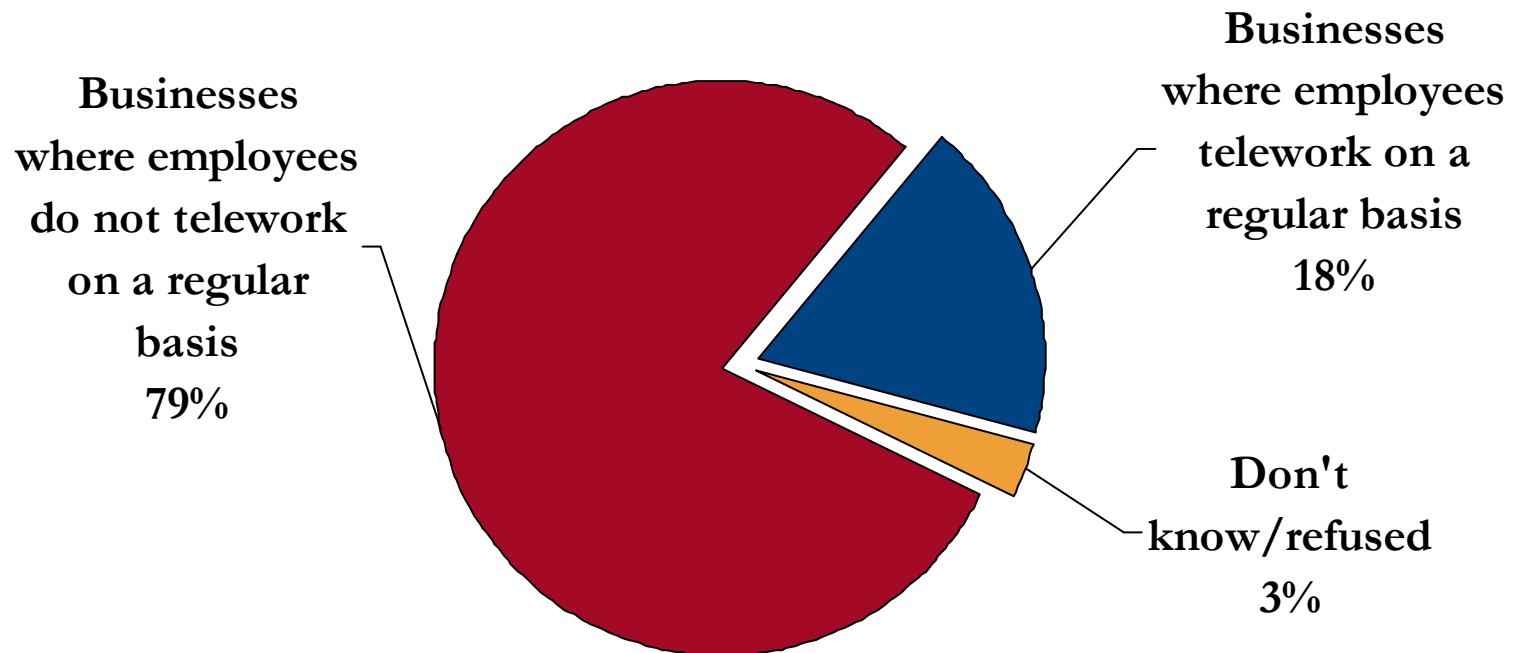
Median Annual Company Revenue (\$000):



Q: What is your firm's approximate average annual revenue?  
(n=802 Ohio businesses)  
2009 © Connect Ohio®

# Ohio Businesses and Telework

Among all Ohio businesses

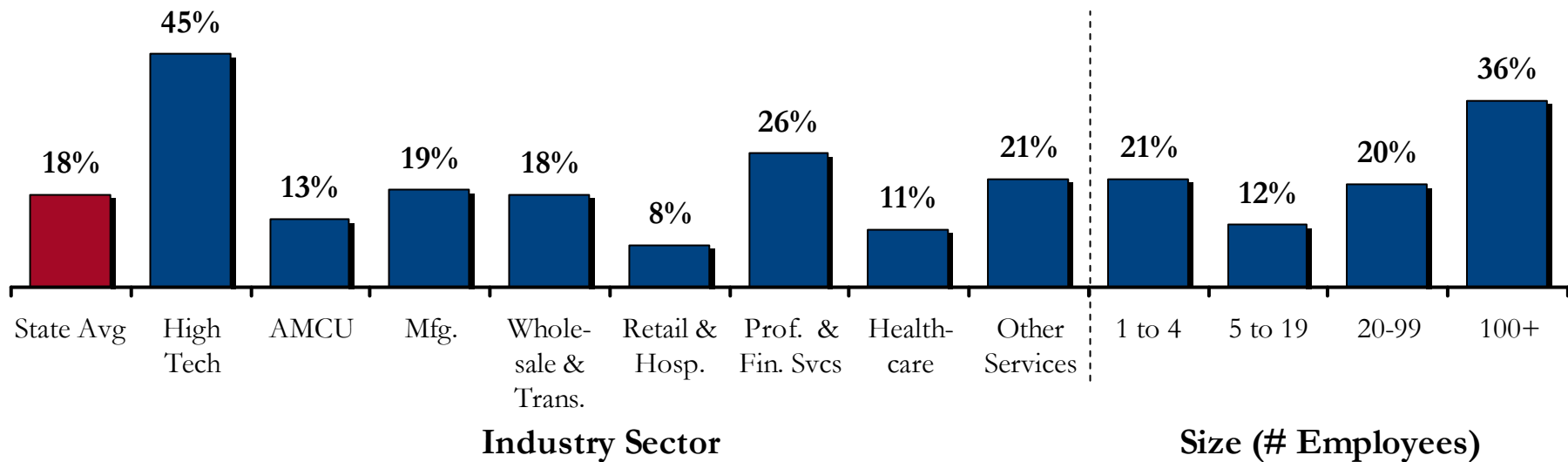


Q: Do any employees within your organization work from home during normal business hours on a regular basis?  
(n=802 Ohio businesses)  
2009 © Connect Ohio®

# Ohio Businesses and Telework by Industry Sector and Size

Businesses in the High Tech and the Professional/Financial Service sectors are the most likely to allow employees to telework, whereas businesses in the Retail/Hospitality and the Healthcare industry sectors are the least likely to do so.

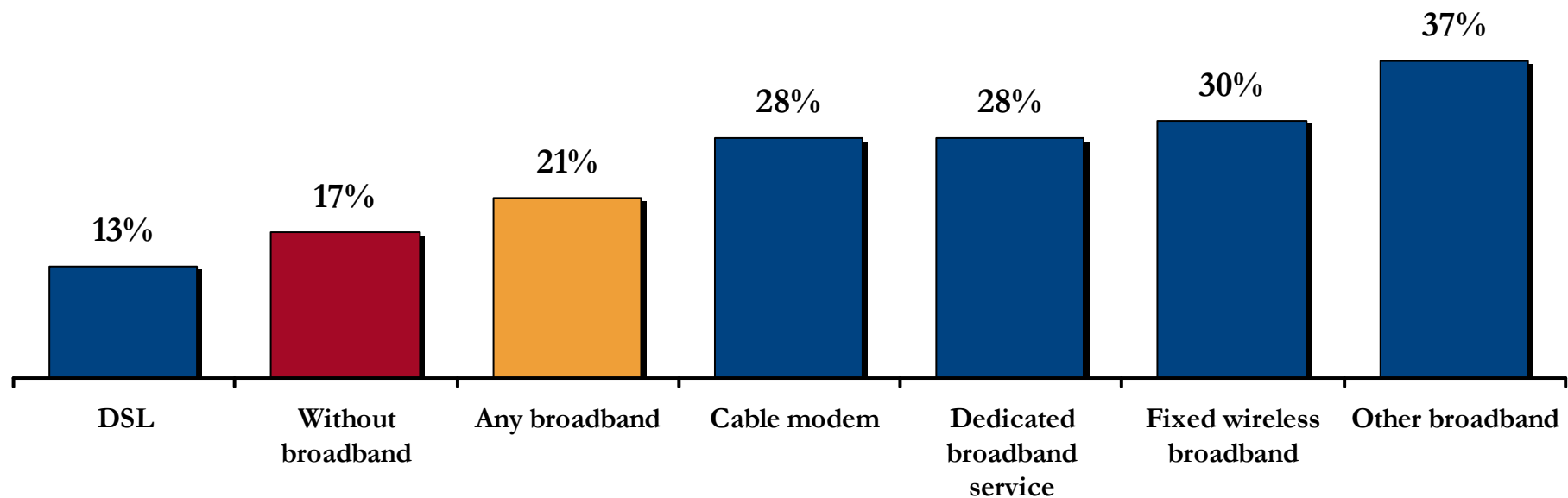
More than one-fifth (21%) of Ohio's smallest businesses (those with fewer than five employees) allow their employees to telework.



Q: Do any employees within your organization work from home during normal business hours on a regular basis?  
(n=802 Ohio businesses)  
2009 © Connect Ohio®

# Ohio Businesses and Telework by Broadband Platform

More than one-fifth (21%) of all broadband-connected businesses allow their employees to telework.



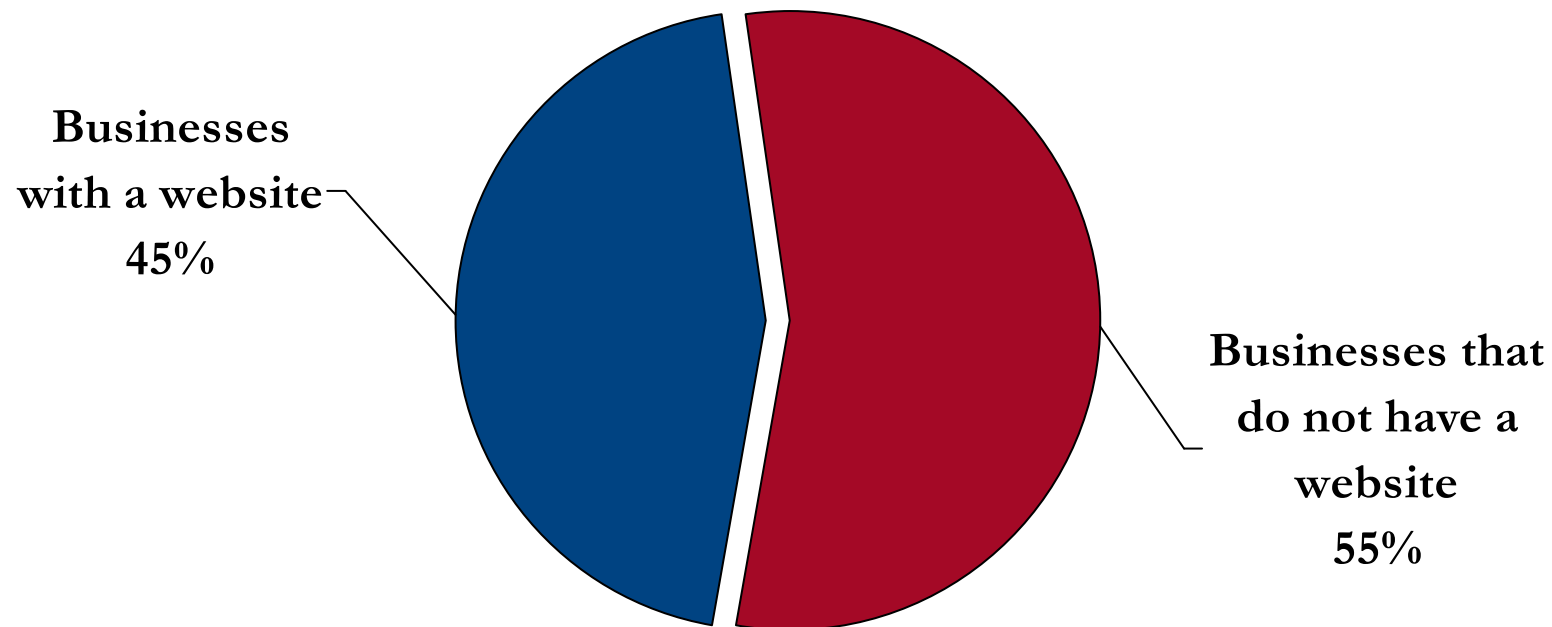
Q: Do any employees within your organization work from home during normal business hours on a regular basis?  
(n=578 Ohio businesses that use the Internet)  
2009 © Connect Ohio®

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# Presence of a Website

## Presence of a Website

Percent of all Ohio businesses



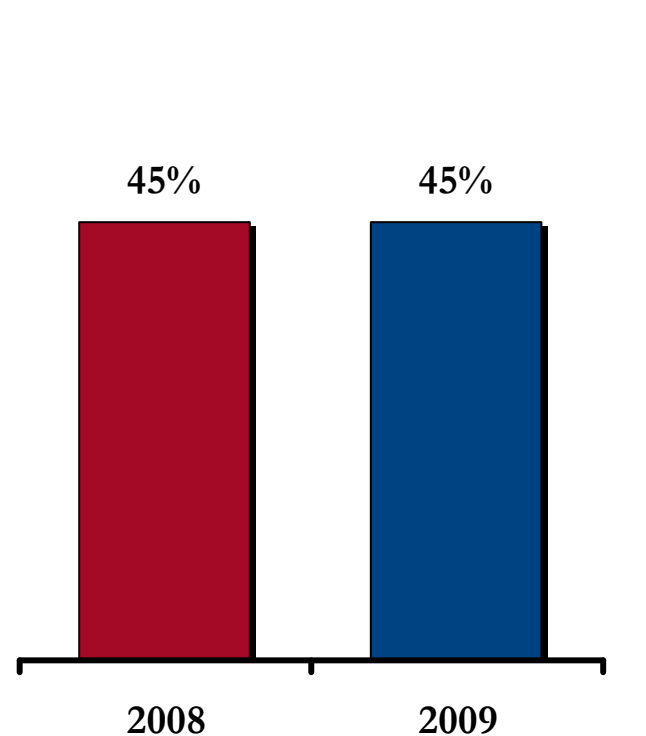
**Forty-five percent of all Ohio businesses maintain a website. This equates to 70% of Ohio businesses that use the Internet.**

# Trends in Website Presence

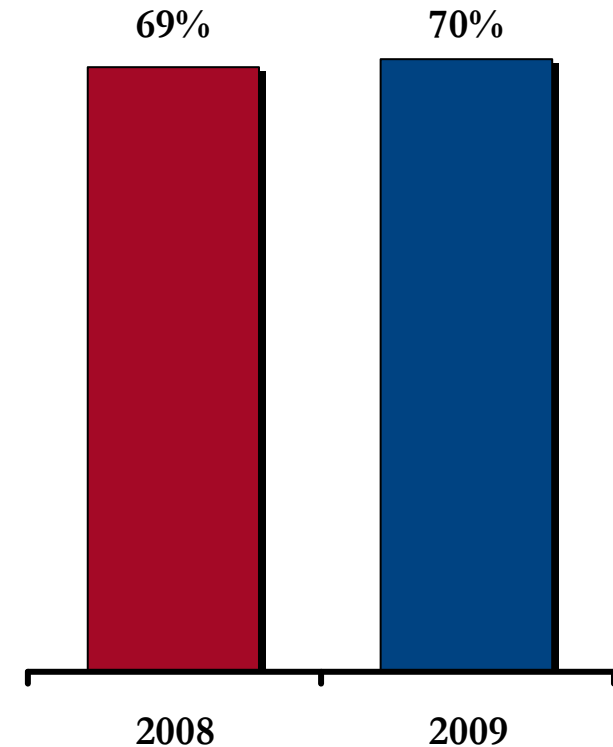
**In 2009, 45% of all Ohio businesses maintain a website. This figure remains unchanged from 2008.**

**Among Internet-connected businesses, though, there was a slight increase in website presence.**

**Percent of all Ohio businesses that maintain websites**



**Percent of Internet-connected Ohio businesses that maintain websites**



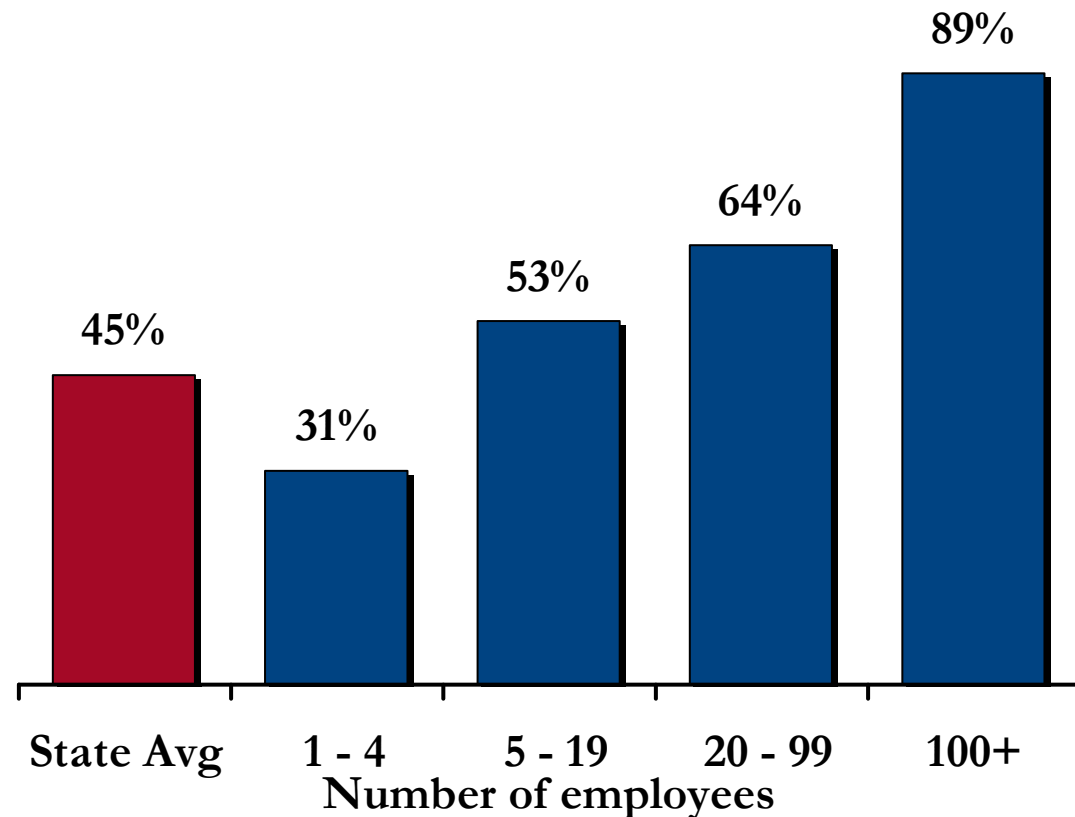
Q: Does your company have a website?  
 (n=807 Ohio businesses in 2008 and  
 n=802 Ohio businesses in 2009)  
 2009 © Connect Ohio®

## Presence of a Website by Company Size

Percent of all Ohio businesses that have a website

The likelihood of having a website increases significantly as the size of the business increases.

The majority of businesses that employ at least five people have a website.

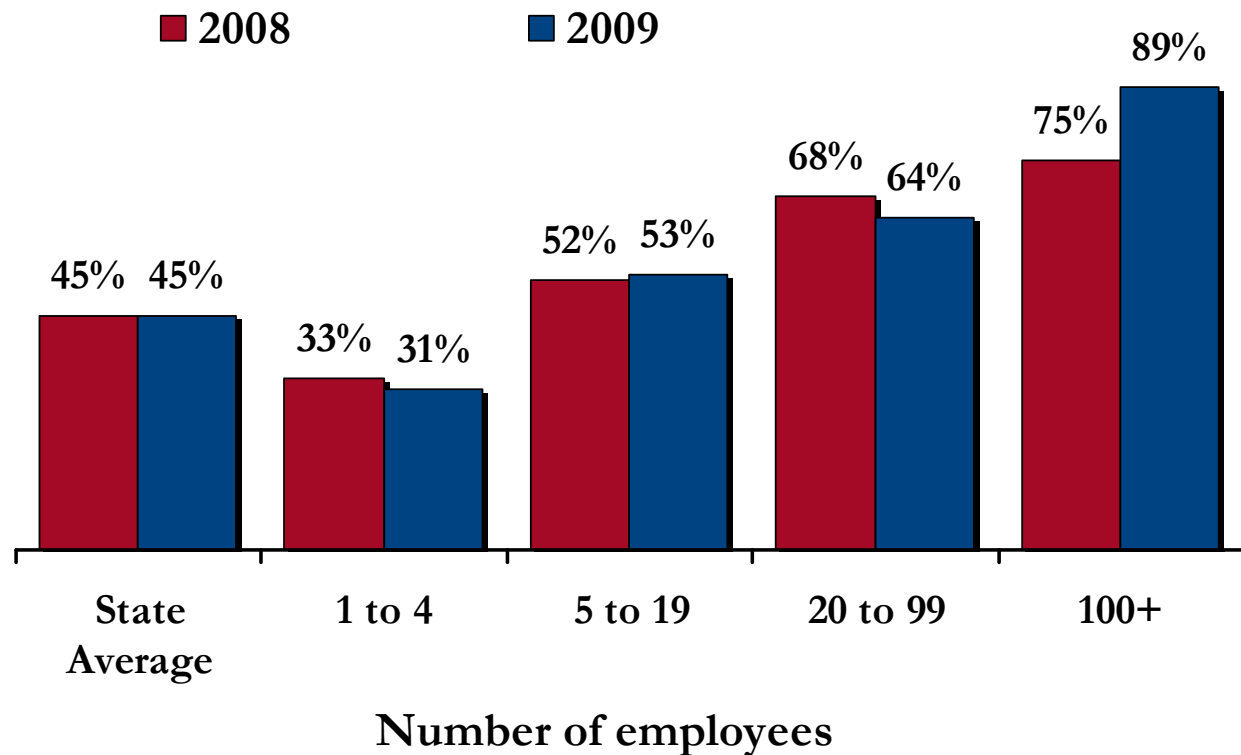


Q: Does your company have a website?  
(n=802 Ohio businesses)  
2009 © Connect Ohio®

# Trends in Website Presence by Company Size

Percent of Ohio businesses that have a website

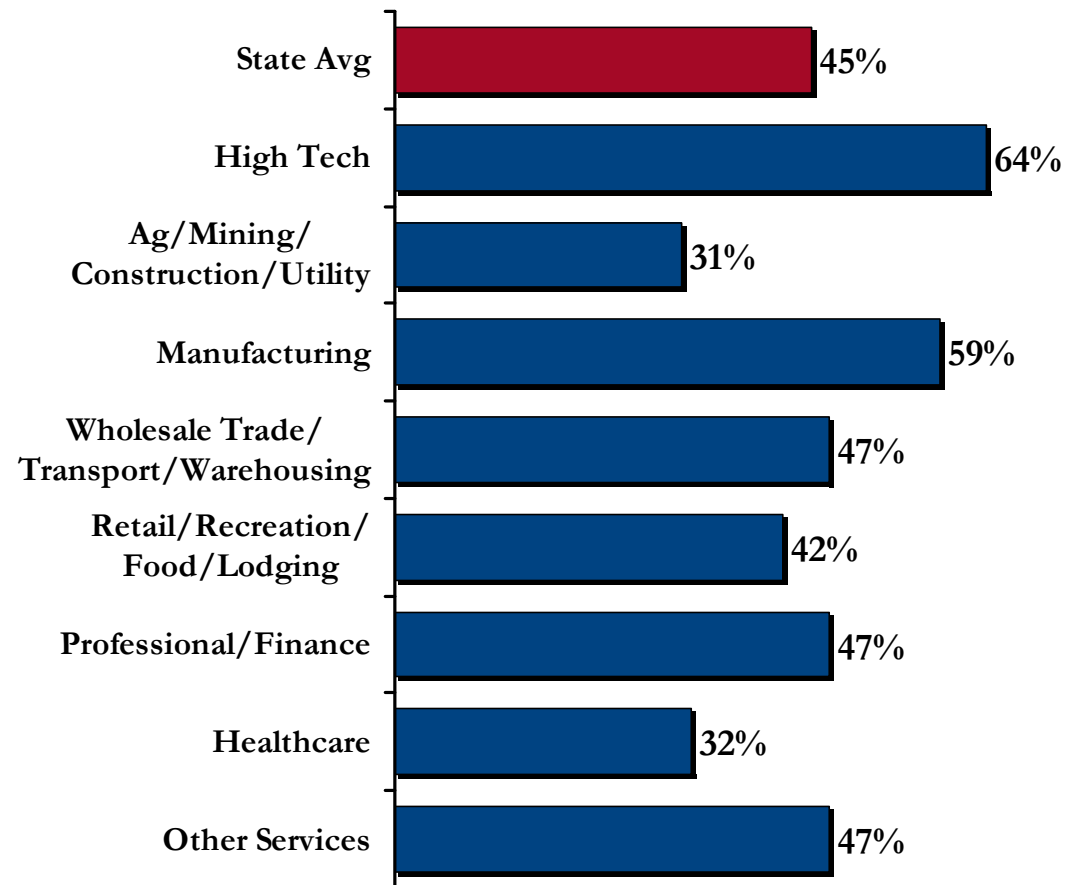
Large businesses (those with 100 or more employees) saw the largest increase in the percent of businesses that have a website.



Q: Does your company have a website?  
(n=807 Ohio businesses in 2008 and  
n=802 Ohio businesses in 2009)  
2009 © Connect Ohio®

## Presence of a Website by Industry Sector

Percent of all Ohio businesses that have a website

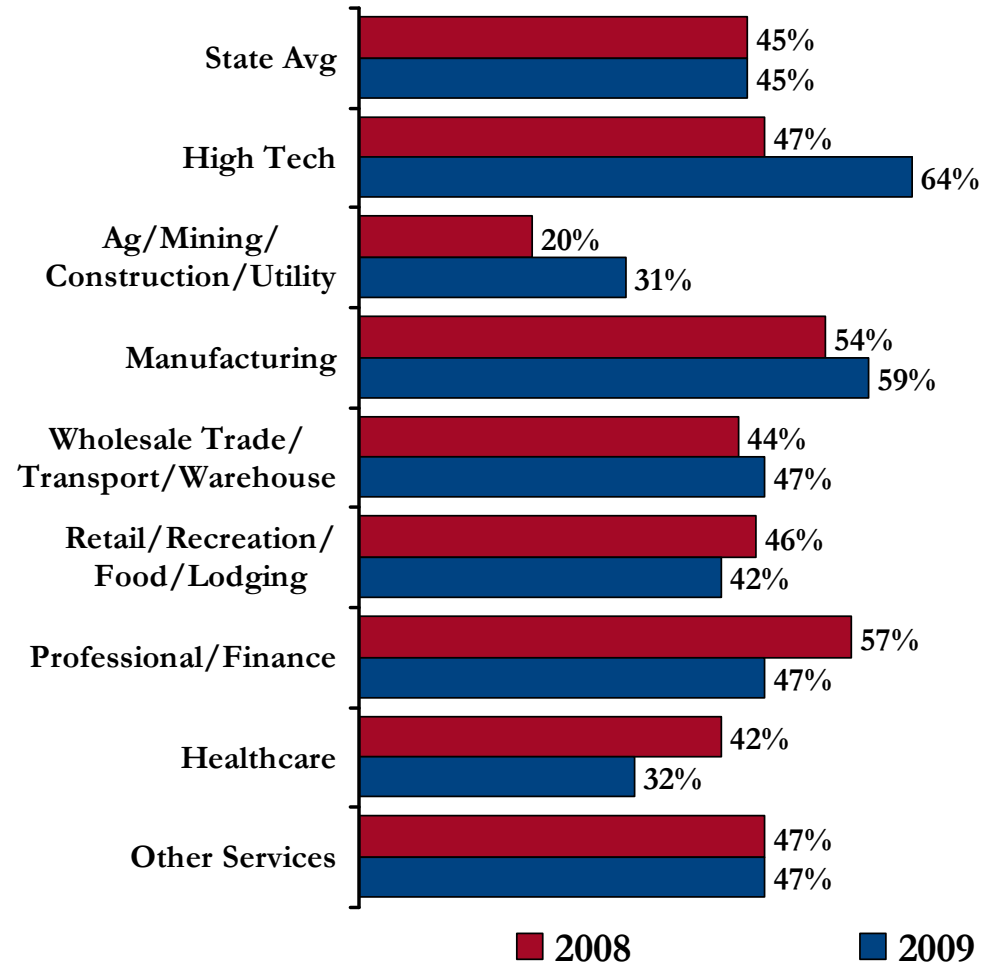


Businesses in the High Tech sector and the Manufacturing sector are more likely than businesses in other sectors to have a website.

The Ag/Mining/Construction/Utility sector has the lowest percentage of businesses with a website.

# Website Presence by Industry Sector

Percent of all Ohio businesses with a website



**Businesses in the High Tech sector and the Agriculture/ Mining/Construction/Utility sectors saw the largest increases in the percent of businesses that have a website.**

**At the same time, the percent of businesses in the Retail/ Recreation/Food/Lodging, the Professional/Finance, and the Healthcare sectors with websites decreased.**

Q: Does your company have a website?  
 (n=802 Ohio businesses)  
 2009 © Connect Ohio®

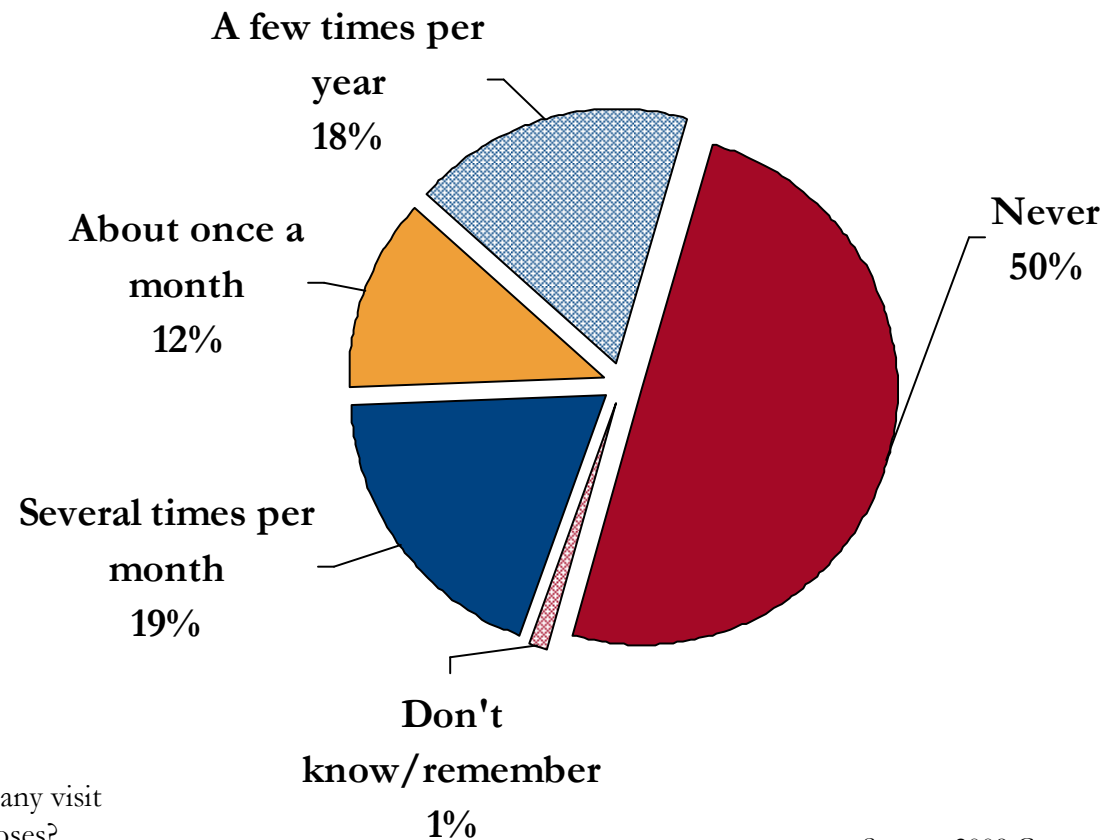
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# E-Government Services

# Business Use of State Government Websites

How often Ohio businesses say their employees visit Ohio state government websites

Nearly one-half (49%) of all Ohio businesses report that their employees visit Ohio state government websites on a regular basis.

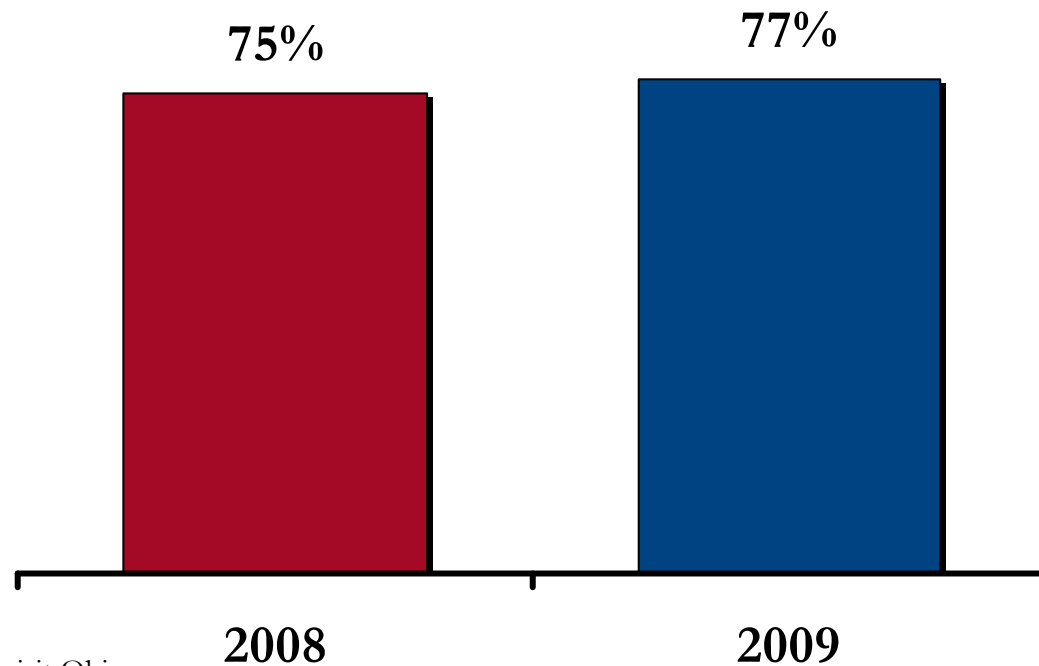


Q: How often, if ever, do employees of your company visit Ohio state government websites for business purposes?  
 (n=802 Ohio businesses)  
 2009 © Connect Ohio®

## E-Government Access Among Internet-Connected Ohio Businesses

Internet-connected Ohio businesses that visit Ohio state government websites

During the past year, the percent of Internet-connected businesses that access Ohio state government websites increased from 75% to 77%.



Q: How often, if ever, do employees of your company visit Ohio state government websites for business purposes?

(n=588 Internet-connected Ohio businesses in 2008 and n=578 Internet-connected Ohio businesses in 2009)

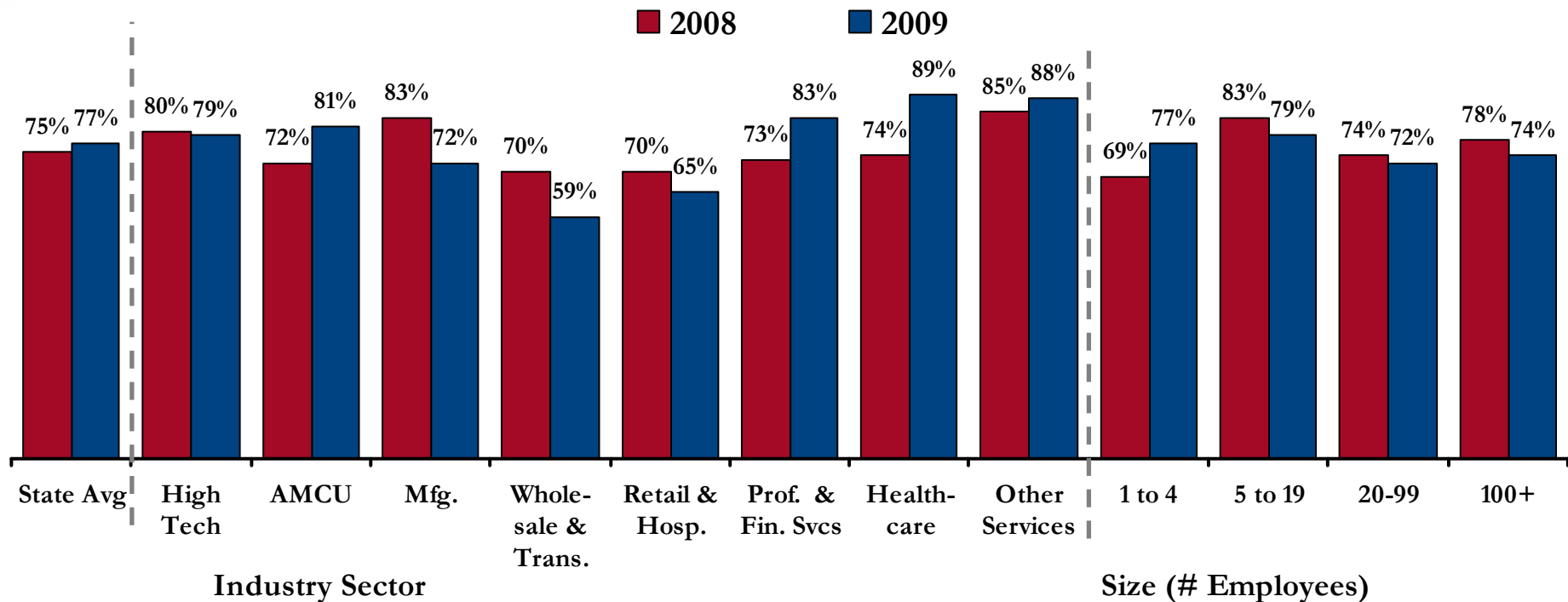
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97  
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Source: 2008 and 2009 Connect Ohio®  
Business Technology Assessments  
[www.connectohio.org](http://www.connectohio.org)

# Trends in Government Website Use by Business Size and Sector

Percent of businesses that visit Ohio state government websites  
at least a few times per year

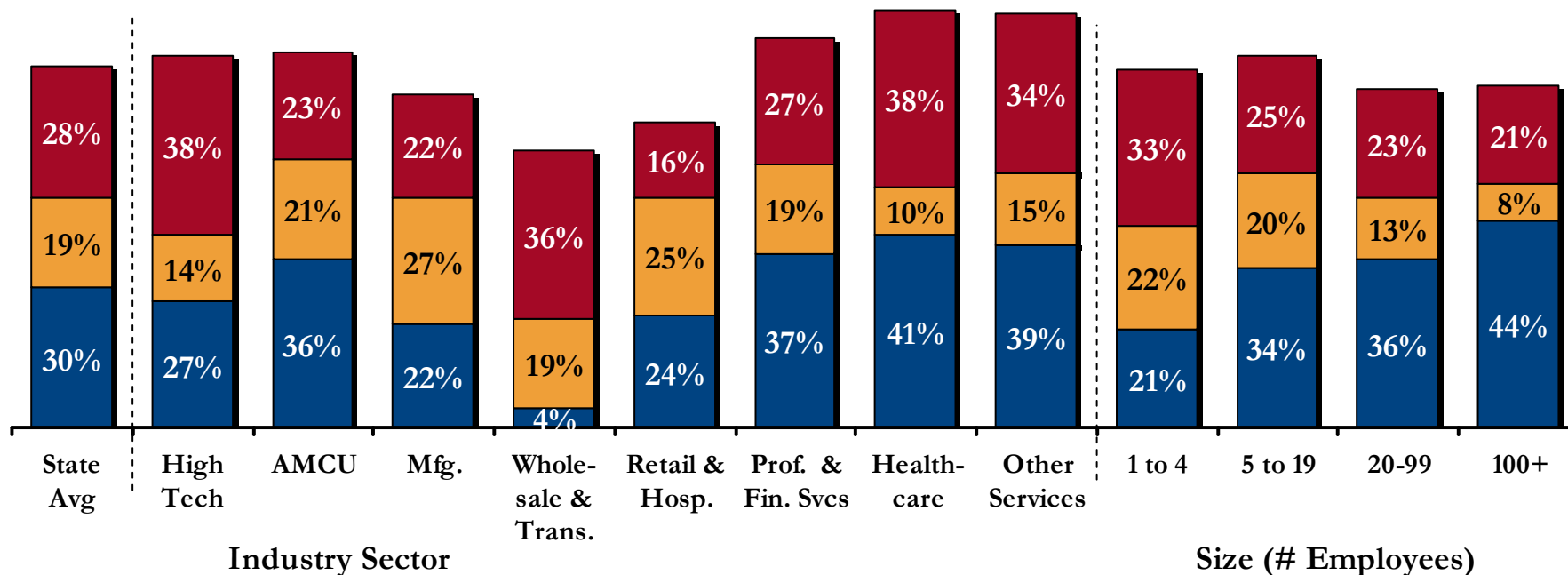


Q: How often, if ever, do employees of your company visit Ohio state government websites for business purposes?  
(n=578 Internet-connected Ohio businesses in 2009 and n=588 Internet-connected Ohio businesses in 2008)  
2009 © Connect Ohio®

# Use of State Government Websites by Business Size and Sector

Percent of businesses that visit Ohio state government websites

■ Several times per month    
 ■ About once a month    
 ■ A few times per year

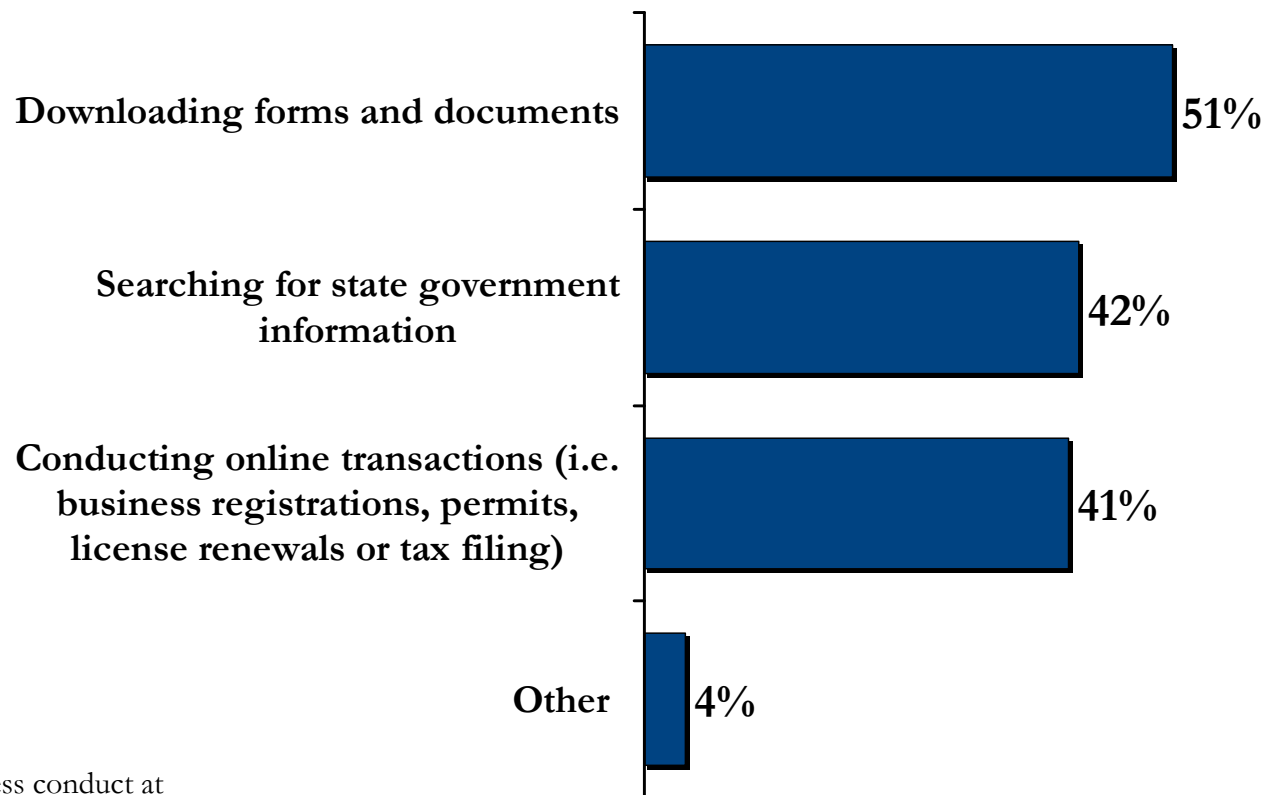


Q: How often, if ever, do employees of your company visit Ohio state government websites for business purposes?  
 (n=578 Internet-connected Ohio businesses)  
 2009 © Connect Ohio®

## Activities at Ohio Government Websites

Percent of all businesses that use Ohio state government websites for the following applications

The most widely used application on state websites is downloading state forms or other documents.

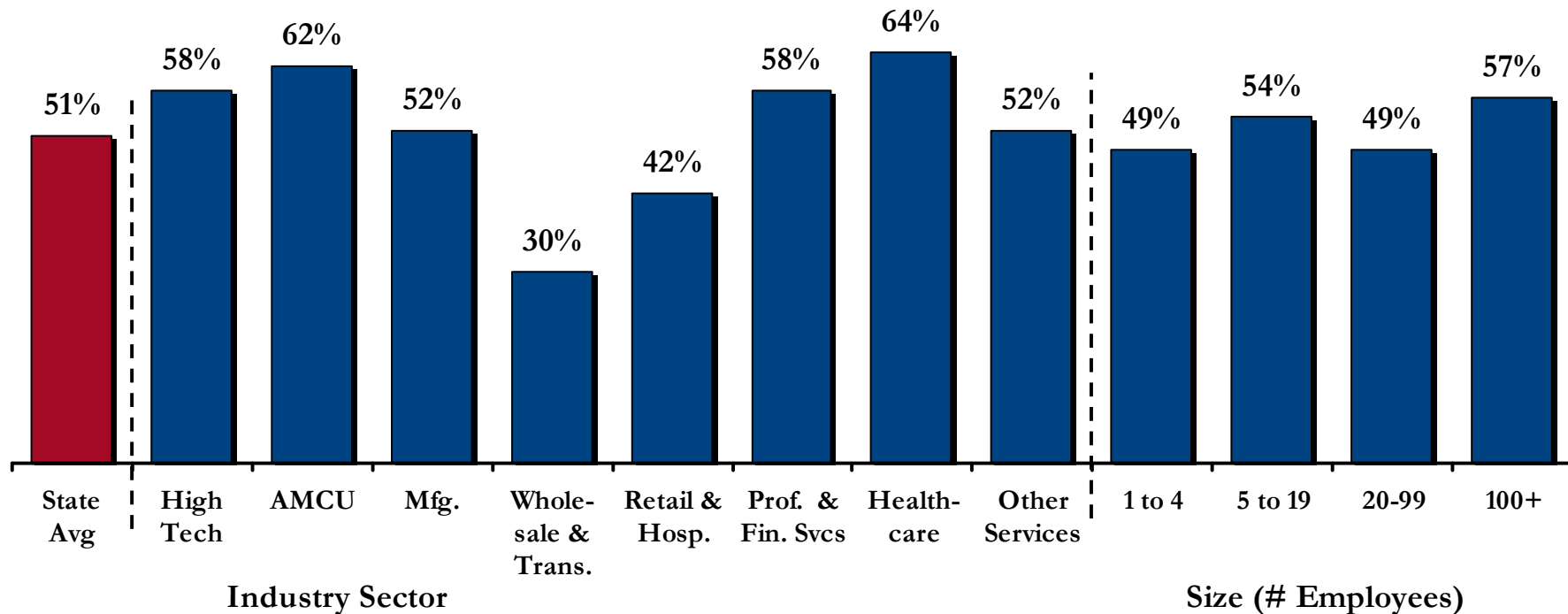


Q: What types of activities does your business conduct at Ohio's state government websites?  
(n=578 Internet-connected Ohio businesses)  
2009 © Connect Ohio®

# Activities at Ohio Government Websites

## by Business Size and Sector

Percent of businesses that visit state government websites to  
**Download state forms and documents**

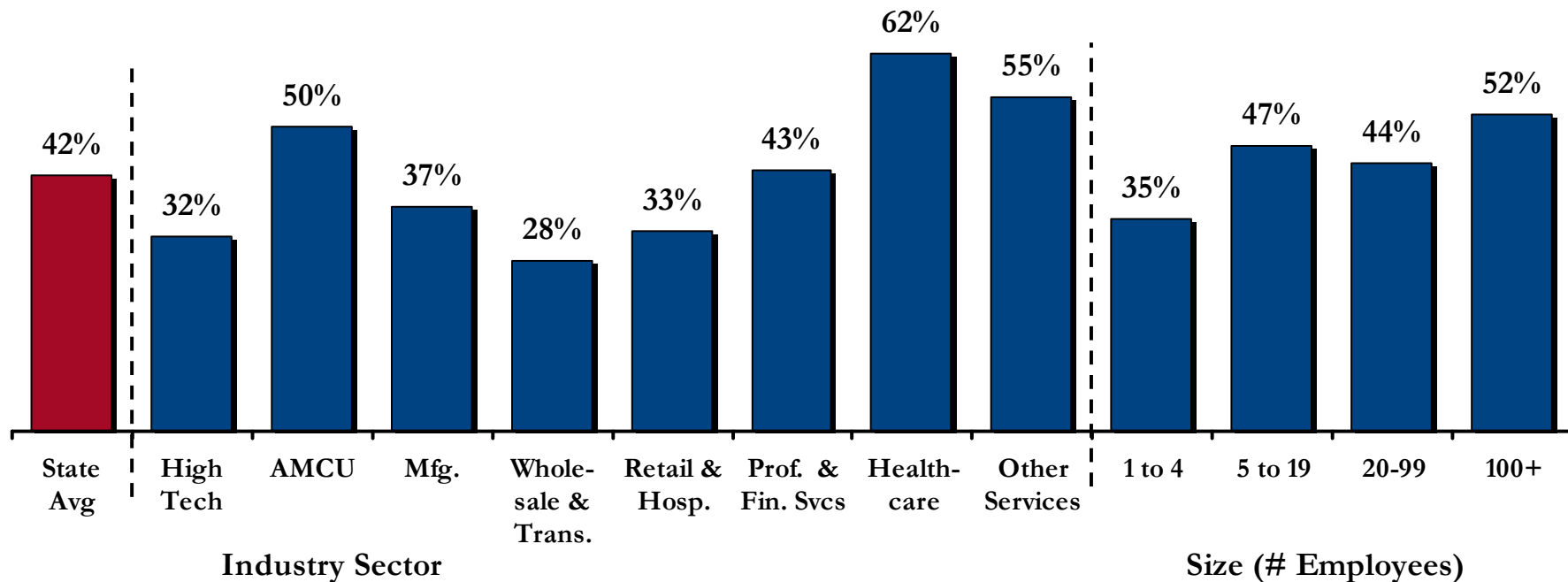


Q: What types of activities does your business conduct at Ohio's state government websites?  
 (n=578 Internet-connected Ohio businesses)  
 2009 © Connect Ohio®

# Activities at Ohio Government Websites

## by Business Size and Sector

Percent of businesses that visit state government websites to Search for state government information

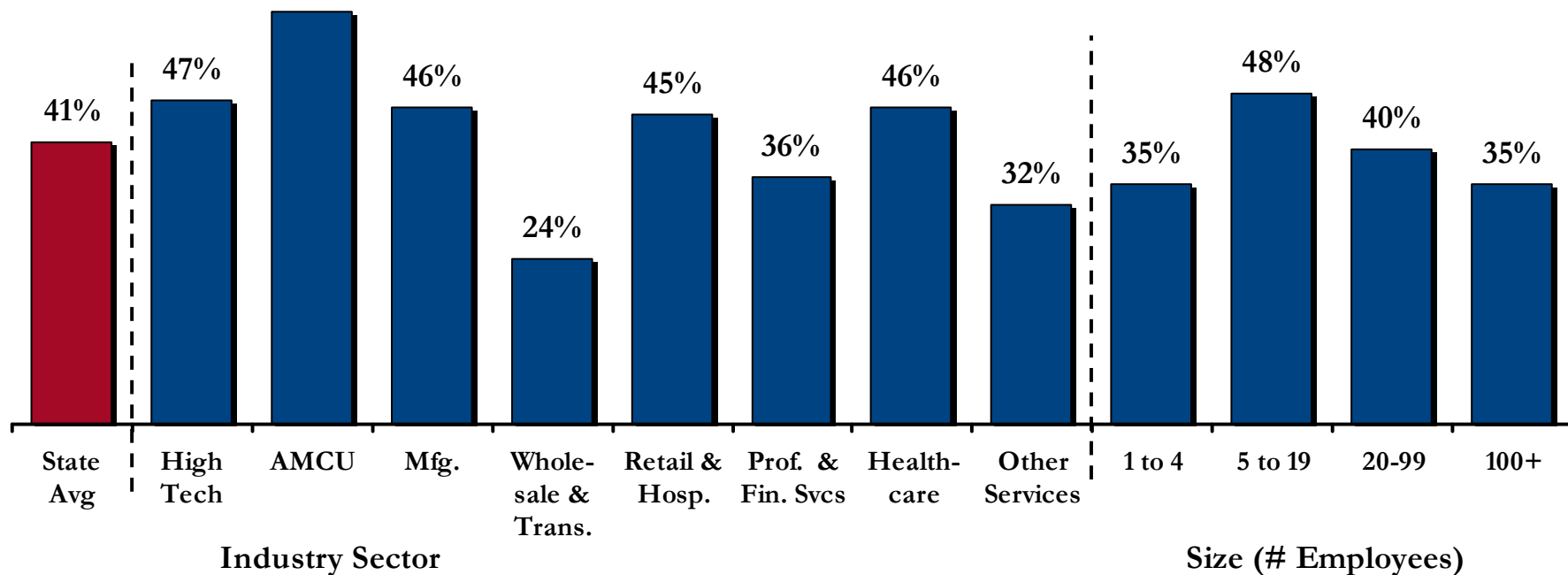


Q: What types of activities does your business conduct at Ohio's state government websites?  
 (n=578 Internet-connected Ohio businesses)  
 2009 © Connect Ohio®

# Activities at Ohio Government Websites

## by Business Size and Sector

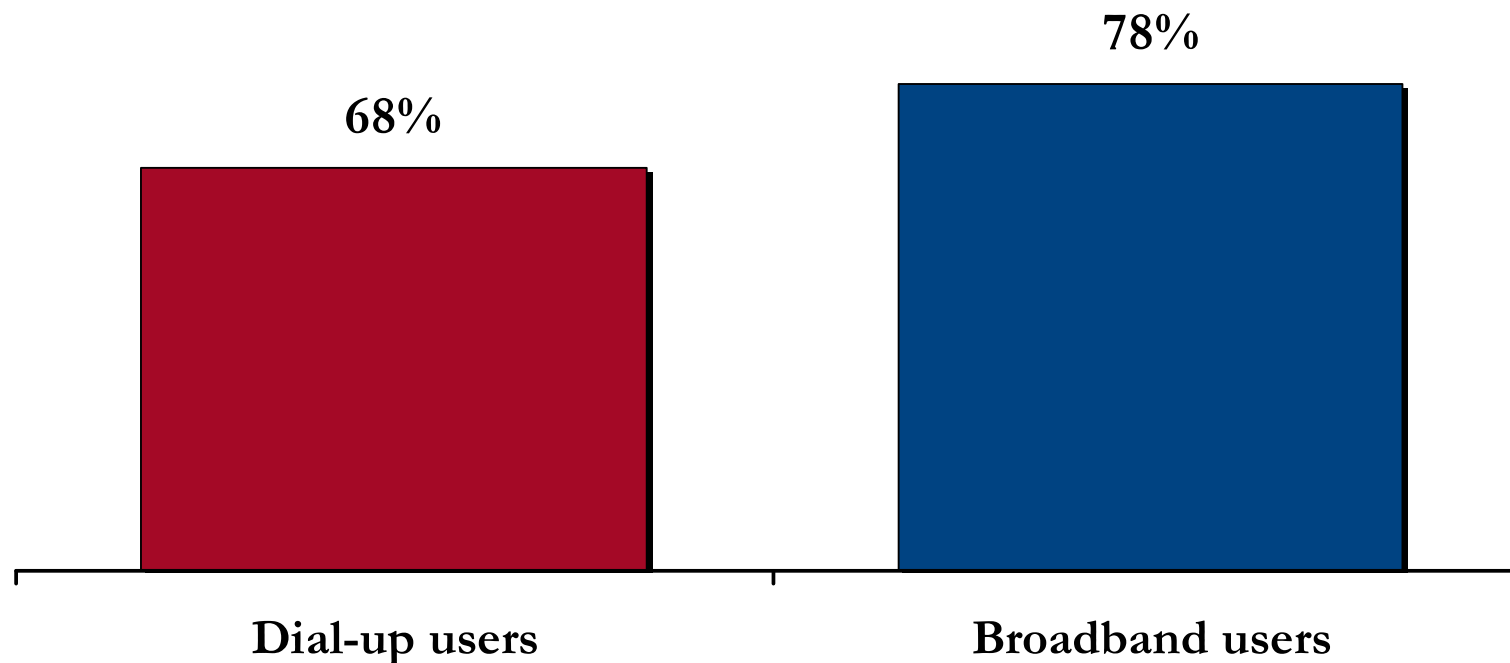
Percent of businesses that visit state government websites to  
**Conduct online transactions with the state**



Q: What types of activities does your business conduct at Ohio's state government websites?  
 (n=578 Internet-connected Ohio businesses)  
 2009 © Connect Ohio®

## Use of State Government Websites Among Dial-Up and Broadband Users

Percent of Internet-connected Ohio businesses that visit state government websites at least a few times per year



Q: How often, if ever, do employees of your company visit Ohio state government websites for business purposes?  
(n=578 Ohio businesses that use the Internet)  
2009 © Connect Ohio®

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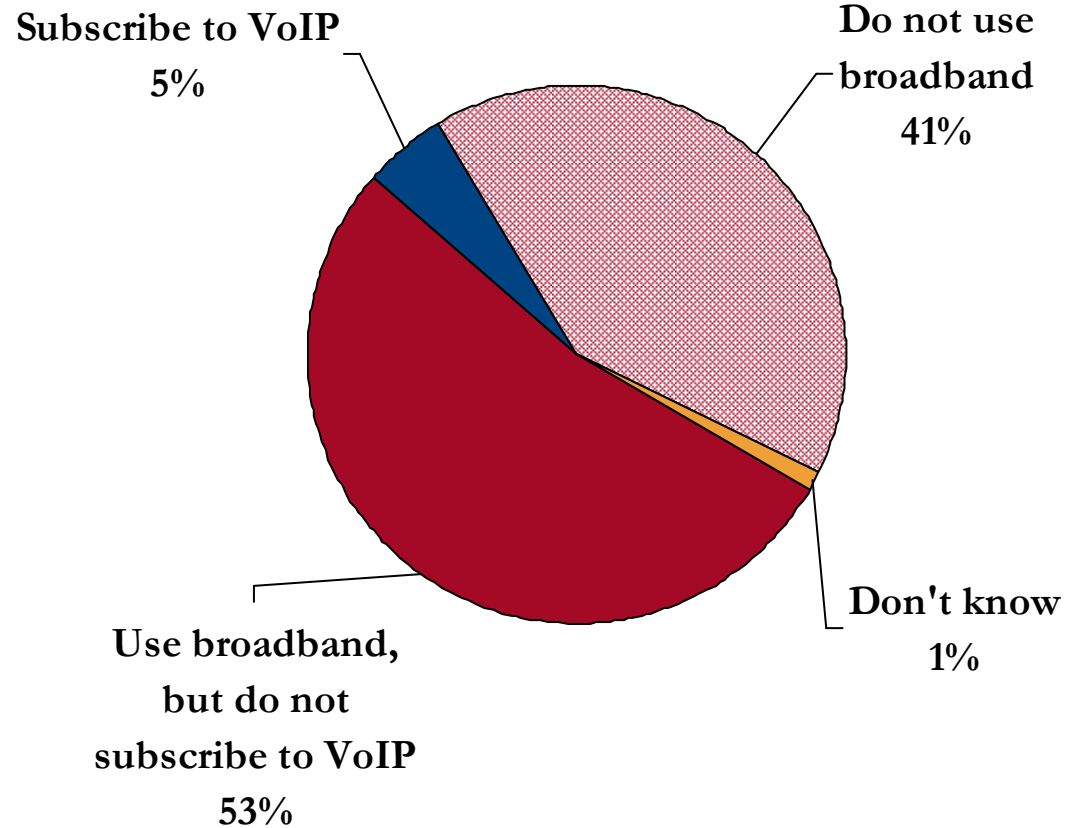
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Source: 2009 Connect Ohio®  
Business Technology Assessment  
[www.connectohio.org](http://www.connectohio.org)

# Voice Over Internet Protocol (VoIP) Subscribers

## Businesses That Use Voice over Internet Protocol (VoIP)

Percent of all Ohio businesses



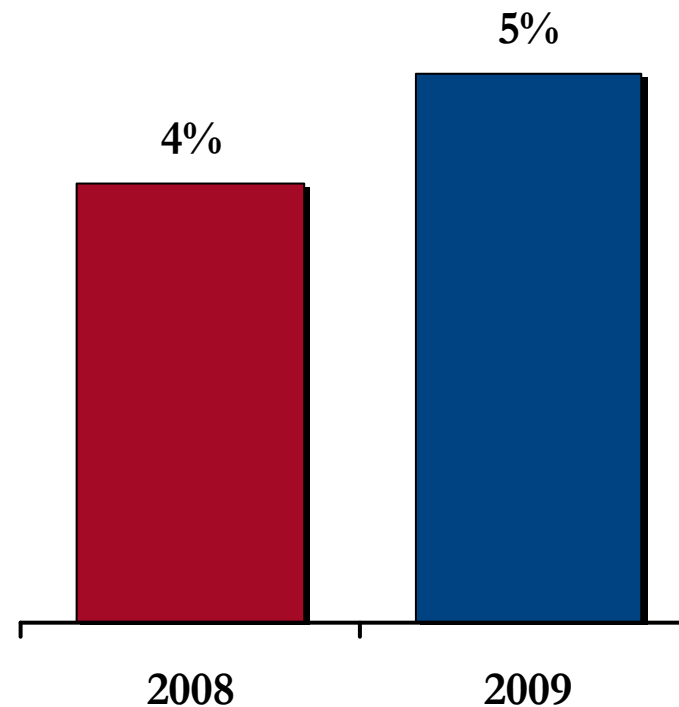
Only a small percentage (5%) of all Ohio businesses subscribe to Voice over Internet Protocol (VoIP). This represents 8% of all broadband-connected businesses in Ohio (a prerequisite for VoIP service).

Q: Do you subscribe to Voice over Internet Protocol, commonly known as VoIP?  
(n=802 Ohio businesses)  
2009 © Connect Ohio®

# Trends in Voice over Internet Protocol (VoIP) Subscriptions

Percent of all Ohio businesses that subscribe to VoIP

Since 2008, there has been a slight increase in the share of businesses that subscribe to Voice over Internet Protocol (VoIP) for their phone service.

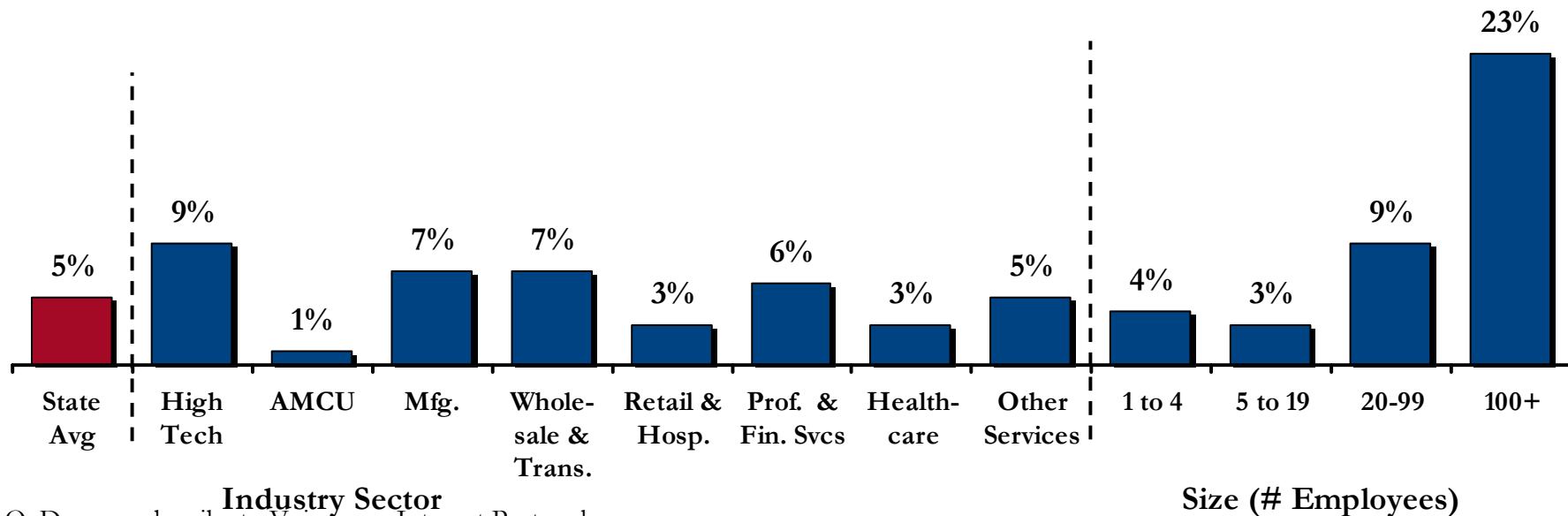


(Q: Do you subscribe to Voice over Internet Protocol, commonly known as VoIP?  
n=807 Ohio businesses in 2008 and  
n=802 Ohio businesses in 2009)  
2009 © Connect Ohio®

## Businesses That Subscribe to VoIP by Size and Industry Sector

Businesses in the High Tech, Manufacturing, Wholesale Trade/Transportation, and Professional/Financial industry sectors are more likely than average to subscribe to VoIP.

Large businesses (those with twenty or more employees) are four times more likely than smaller businesses to subscribe to VoIP.

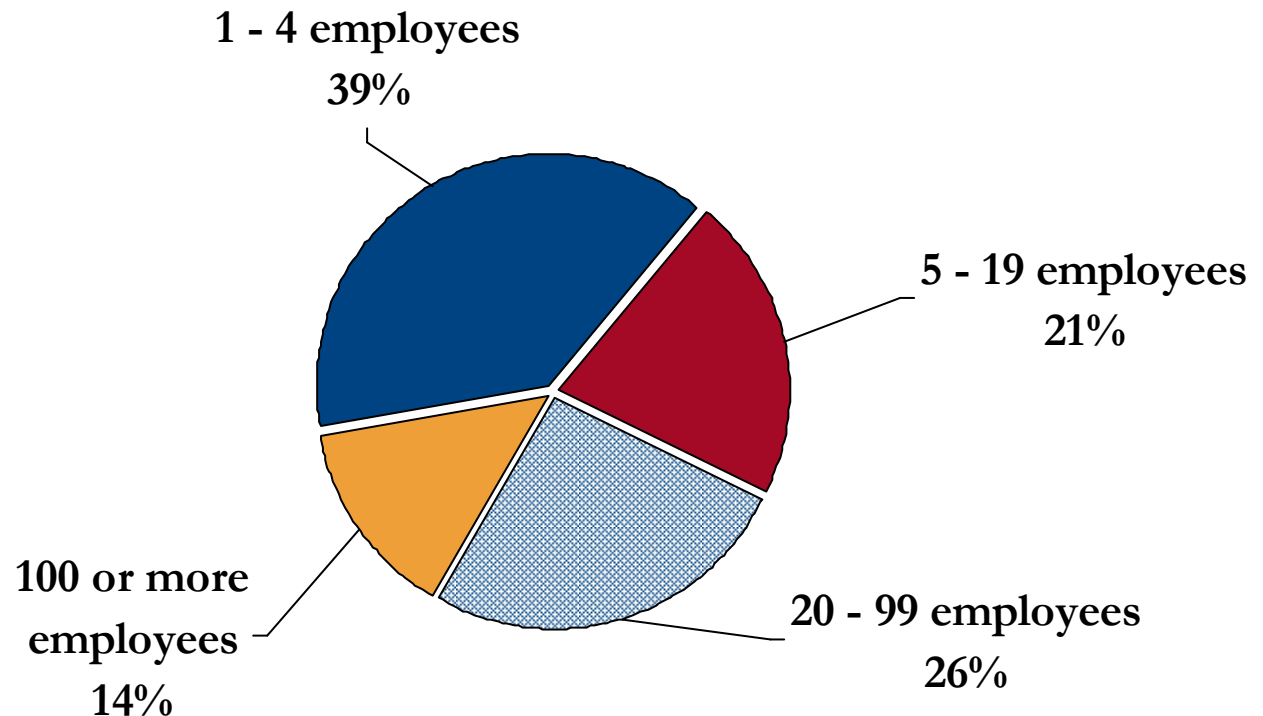


Q: Do you subscribe to Voice over Internet Protocol, commonly known as VoIP?  
(n=802 Ohio businesses)  
2009 © Connect Ohio®

## VoIP Subscribers by Business Size

Percent of Ohio Businesses that subscribe to VoIP

More than one-half (60%) of Ohio businesses that subscribe to VoIP have fewer than twenty employees.



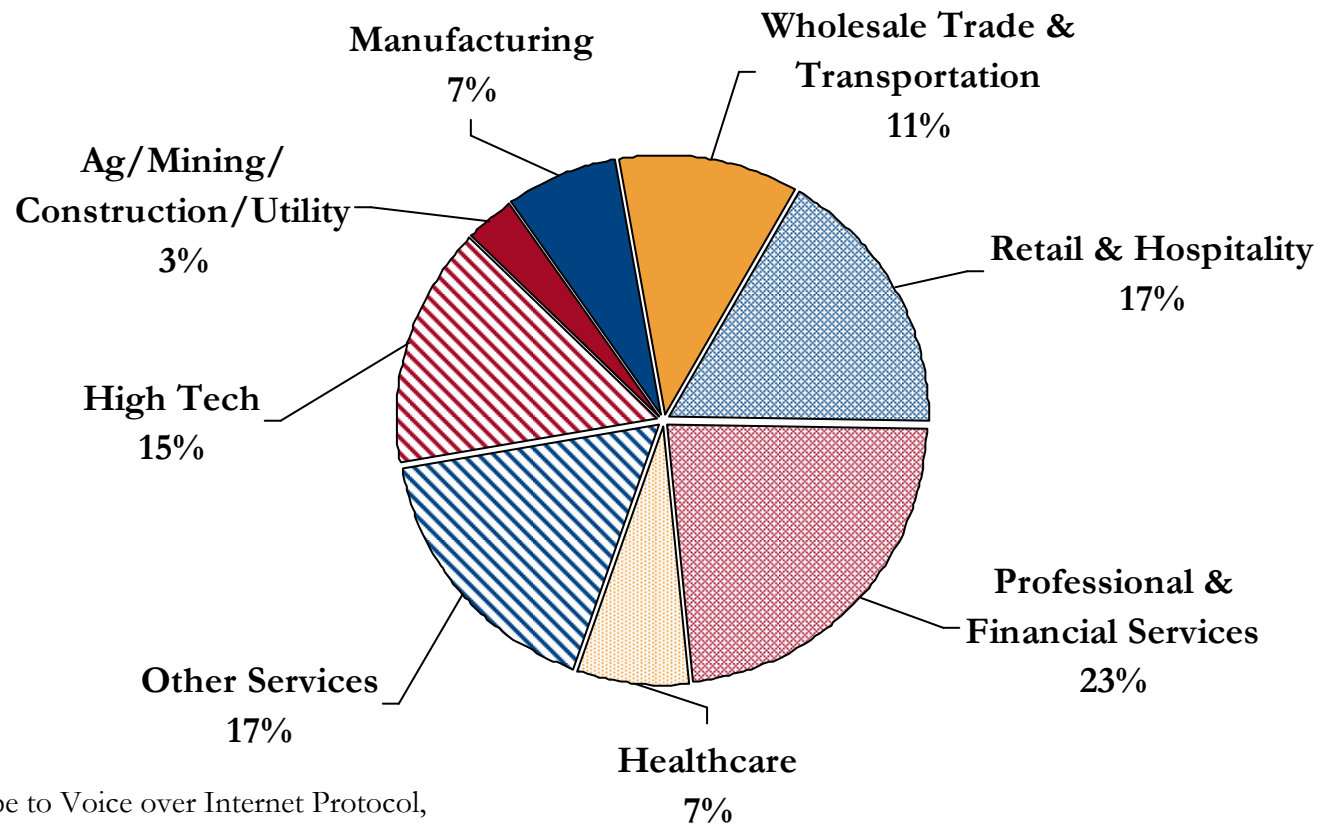
Q: Do you subscribe to Voice over Internet Protocol, commonly known as VoIP?

(n=64 Ohio businesses who subscribe to VoIP)

2009 © Connect Ohio®

# VoIP Subscribers by Industry Sector

Percent of Ohio Businesses that subscribe to VoIP



Q: Do you subscribe to Voice over Internet Protocol, commonly known as VoIP?

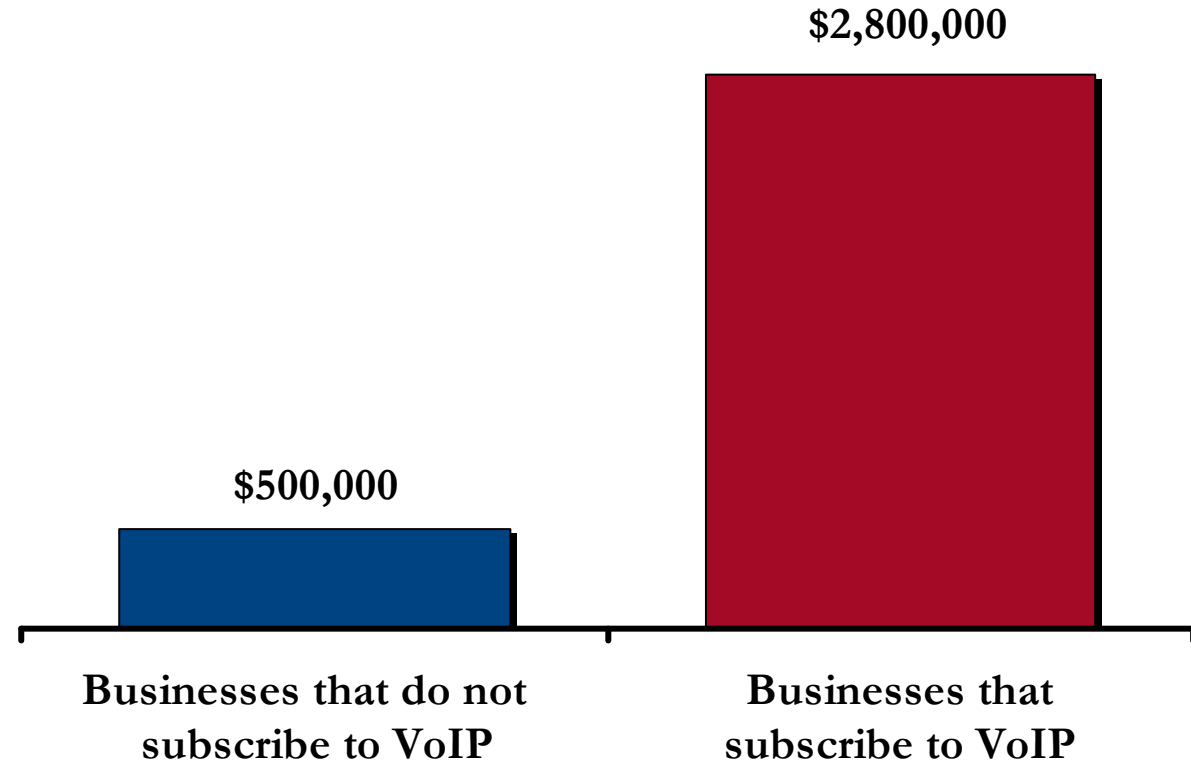
(n=64 Ohio businesses who subscribe to VoIP)

2009 © Connect Ohio®

# Annual Business Revenues Among VoIP Subscribers

Median annual revenues

The average annual revenue among businesses that subscribe to VoIP is more than five times greater than among businesses that do not subscribe.



Q: What is your firm's approximate average annual revenue?  
(n=802 Ohio businesses)  
2009 © Connect Ohio®

# Research Methodology

## Methodology Overview

- The Connected Ohio Business Survey interviewed 802 businesses by telephone between April 10 and April 23, 2009. Data were collected by Thoroughbred Research Group of Louisville, Kentucky. [www.torinc.net](http://www.torinc.net).
- The error interval is  $\pm 4.7\%$  at the 95% confidence level. This sample error accounts for sample weighting, using the effective sample size.
- On average, once agreeing to participate in the survey, interviews lasted 10 minutes.
- Sample quotas were established by company size (5 brackets) and industry sector (8 sectors). Within these 40 cells, Dun & Bradstreet provided a random sample of businesses selected for the survey. This approach gathers enough interviews within size and industry sub-sectors to analyze the data with confidence.
- By weighting the survey data, the total sample is made to be representative of all employer business establishments, according to the U.S. Census Bureau County Business Patterns. Weighting and research consultation were provided by Lucidity Research LLC. [www.lucidityresearch.com](http://www.lucidityresearch.com).

## Methodology: Definitions

- **The federal government classifies and tabulates the number, size and type of businesses in two ways:**
  - Business establishments with paid employees
  - Non-employer business establishments
- **The U.S. Census Bureau defines a business establishment as “a single physical location at which business is conducted or services or industrial operations are performed.”**
- **Businesses with paid employees are reported in the *County Business Patterns* (CBP) data from the U.S. Census Bureau based on payroll tax information. This is the most comprehensive and consistent year-to-year measurement of private employer businesses. For this reason, many state agencies rely on these data for economic development and planning purposes.**
- **In 2006, there were 269,914 private business establishments in Ohio, employing approximately 4.8 million residents. This is the sample frame for the survey.**

## Methodology: Definition of High Tech Firms

For several years, many states and economic development organizations had been quantifying and tracking their progress in “high-technology” employment and job creation using federal government data sources and a list of industry sectors identified in 1999 as employing a disproportionate share of people in science, engineering, technician and “research and development” occupations.

In an article published in the July 2005 *Monthly Labor Review*, the study that defined the initial set of High Tech industry sectors was updated to reflect the more recent statistics, including the change in federal statistics from the old Standard Industrial Classification (SIC) to the North American Industry Classification System (NAICS). The study measures the presence of “technology oriented workers” (including engineers, engineering technicians, scientists, science technicians, as well as managers in engineering, computing/information systems and science) in each NAICS sector.

For this study, Connect Ohio defined the High Tech sector by four-digit NAICS codes, in accordance with the July 2005 article.

# Methodology: Classification of High Tech Firms

**For the purposes of this survey, the High Tech sector includes businesses in the following industries by NAICS code in accordance with the June 2005 *Monthly Labor Review*:**

Forestry  
Oil & Gas Extraction  
Electric Power Generation, Transmission or Distribution  
Petroleum and Coal Products Manufacturing  
Basic Chemical Manufacturing  
Resin, Synthetic Rubber, and Synthetic Fiber and Filaments Manufacturing  
Pesticides, Fertilizers and Other Agricultural Chemicals Manufacturing  
Pharmaceuticals and Medicine Manufacturing  
Paint, Coatings and Adhesives Manufacturing  
Other Chemical Products Manufacturing  
Agricultural, Construction and Mining Machinery Manufacturing  
Industrial Machinery Manufacturing  
Commercial and Service Machinery Manufacturing  
Engines, Turbines and Power Transmission Equipment Manufacturing  
Other General Purpose Machinery Manufacturing  
Computers and Peripheral Equipment Manufacturing  
Communications Equipment Manufacturing  
Audio and Video Equipment Manufacturing  
Semiconductors and Other Electrical Equipment Manufacturing  
Navigational, Measurement and Control Instruments Manufacturing  
Manufacturing and Reproduction of Magnetic or Optical Media  
Electrical Equipment Manufacturing  
Motor Vehicle Manufacturing  
Motor Vehicle Bodies and Trailers Manufacturing

Motor Vehicle Parts Manufacturing  
Aerospace Products and Parts Manufacturing  
Other Transportation Equipment Manufacturing  
Medical Equipment and Supplies Manufacturing  
Professional and Commercial Equipment Wholesale  
Pipeline Transportation (all sub sectors)  
Software Publishers  
Internet Publications and Broadcasting  
Wired Telecommunications Carriers  
Wireless Telecommunications Carriers  
Telecommunications Resellers  
Satellite Telecommunications  
Other Telecommunications  
Internet Service Providers and Portals  
Data Processing, Hosting and Related Services  
Monetary Authorities (Central Bank)  
Securities and Commodities Exchanges  
Architecture, Engineering and Related Services  
Computer Systems Design and Related Services  
Management Scientific and Technical Consulting Services  
Scientific Research and Development Services  
Management of Companies and Enterprises  
Facilities Support Services  
Electronic and Precision Equipment Repair and Maintenance

## Methodology: Weighting

The 2009 survey data were sampled and weighted by quotas defined by size and industry sector using the most recent *County Business Patterns* data as targets.

Respondent estimates of the number of employees at the business location called were used in place of employee size data from Dun & Bradstreet. Industry sector quotas were defined based on NAICS groups shown in the tables below, according to Dun & Bradstreet data and confirmed during the interview itself.

Sampled and actual distribution of businesses are summarized below.

Sector	Survey Sample Distribution, by Size					Distribution per 2006 County Business Patterns				
	1 - 4	5 - 19	20 - 49	50-99	100+	1 - 4	5 - 19	20 - 49	50-99	100+
High Tech	2.9%	3.1%	3.0%	1.9%	1.2%	4.2%	2.1%	0.8%	0.4%	0.5%
Ag/Mining/Construction/Utility	3.0%	4.1%	4.1%	0.9%	0.5%	6.1%	2.9%	0.6%	0.2%	0.1%
Manufacturing	3.4%	3.0%	3.2%	2.0%	1.1%	1.4%	1.7%	0.8%	0.4%	0.4%
W'sale Trade/Transport/W'housing	3.0%	3.2%	3.5%	1.4%	1.1%	3.9%	2.7%	0.9%	0.3%	0.2%
Retail/Recreation/Food/Lodging	3.4%	3.2%	3.1%	1.9%	1.1%	9.6%	10.1%	3.6%	1.2%	0.6%
Professional/Finance	3.5%	3.2%	3.0%	0.9%	1.1%	10.2%	5.5%	0.9%	0.3%	0.2%
Healthcare	2.9%	3.0%	3.2%	1.7%	1.5%	4.0%	4.2%	1.0%	0.4%	0.5%
Other Services	3.5%	3.6%	3.4%	1.9%	1.2%	9.5%	5.7%	1.1%	0.4%	0.4%



## Contact Information

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