

APPENDIX B.i.

Business Cross Tabulations and Histograms

Upper Peninsula LinkMichigan Aggregate Data

Upper Peninsula Aggregate

Business Survey Summary

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Upper Peninsula Aggregate

Foreword

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

This document contains the survey results of the use of and need for connectivity services in The Upper Peninsula.

The results of the surveys indicate a gap in connectivity services. The initial gap, however, is not just an availability issue, but a value proposition. In other words, the demand for connectivity services is price sensitive. The majority of businesses have a high-speed Internet option available; however, 41% still choose a low-speed dial-up service. The survey results support the need to increase the awareness of the benefits of advanced connectivity services.

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

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

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

Upper Peninsula Aggregate

Business Survey Summary

Section 1:

Business Survey Results Summary

Upper Peninsula Aggregate

Business Survey

Survey Results Summary

Internet and Computer Use

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

- 55% of Upper Peninsula businesses indicate that there are other offices or locations within their county with which they exchange data. Of these, 65% indicated they exchange data with three or more locations; 16% exchange data with just one other location.
- 79% of businesses frequently exchange data with offices or locations outside of their county. Of these, 80% exchange data with three or more locations outside of their county; 11% exchange data with one other location in Michigan. The city or region of these locations follow:
 - 37% Area 1 (Gogebic, Ontonagon, Houghton, Keweenaw)
 - 49% Area 2 (Baraga, Iron, Marquette)
 - 40% Area 3 (Dickinson, Menominee, Delta)
 - 29% Area 4 (Alger, Schoolcraft, Luce)
 - 28% Area 5 (Chippewa, Mackinac)
 - 17% Area 6 (Emmet, Cheboygan, Presque Isle)
 - 19% Area 7 (Antrim, Grand Traverse, Leelanau, Benzie)
 - 15% Area 8 (Otsego, Montmorency, Alpena)
 - 13% Area 9 (Kalaska, Crawford, Oscoda, Alcona)
 - 51% Area 10 (Lower Peninsula of Michigan)
 - 37% Area 11 (Detroit/Grand Rapids/Kalamazoo Areas)
 - 40% Area 12 (Green Bay, Milwaukee, Madison)
 - 35% Area 13 (Northern Wisconsin)
- Of Upper Peninsula businesses that exchange data with other regions within the U.S., the percentage of businesses that exchange data with the following regions follows:
 - 40% Central
 - 69% Midwest
 - 37% Northeast
 - 24% Northwest
 - 28% South
 - 34% Southeast
 - 36% Southwest

Internet and Computer Use (continued)

- Of Upper Peninsula businesses that exchange data with international locations, the percentage of Upper Peninsula businesses that exchange data with the following regions follows:
 - 3% Africa
 - 5% Asia
 - 6% Australia
 - 23% Canada
 - 4% Central America
 - 12% Europe
 - 6% Mexico
 - 2% Middle East
 - 3% South America

- Upper Peninsula businesses recorded the following levels of likelihood with various uses of Internet access in the next two years:
 - Access to information: 92% likely or already use
 - Create/maintain a website: 76% likely or already use
 - Develop new products exclusively on Internet: 20% likely or already use
 - Engage in business-to-business commerce: 87% likely or already use
 - Engage in e-commerce with customers: 53% likely or already use
 - Inventory management: 36% likely or already use
 - Market new products exclusively on Internet: 49% likely or already use
 - Provide technical support to customers: 49% likely or already use
 - Recruit employees: 43% likely or already use
 - Develop ability for employees to work at home: 35% likely or already use

- 34% of businesses have 5 or more computers at the location. 66% have four or fewer computers.

- 64% of computers at Upper Peninsula businesses are connected with a Local Area Network (LAN).

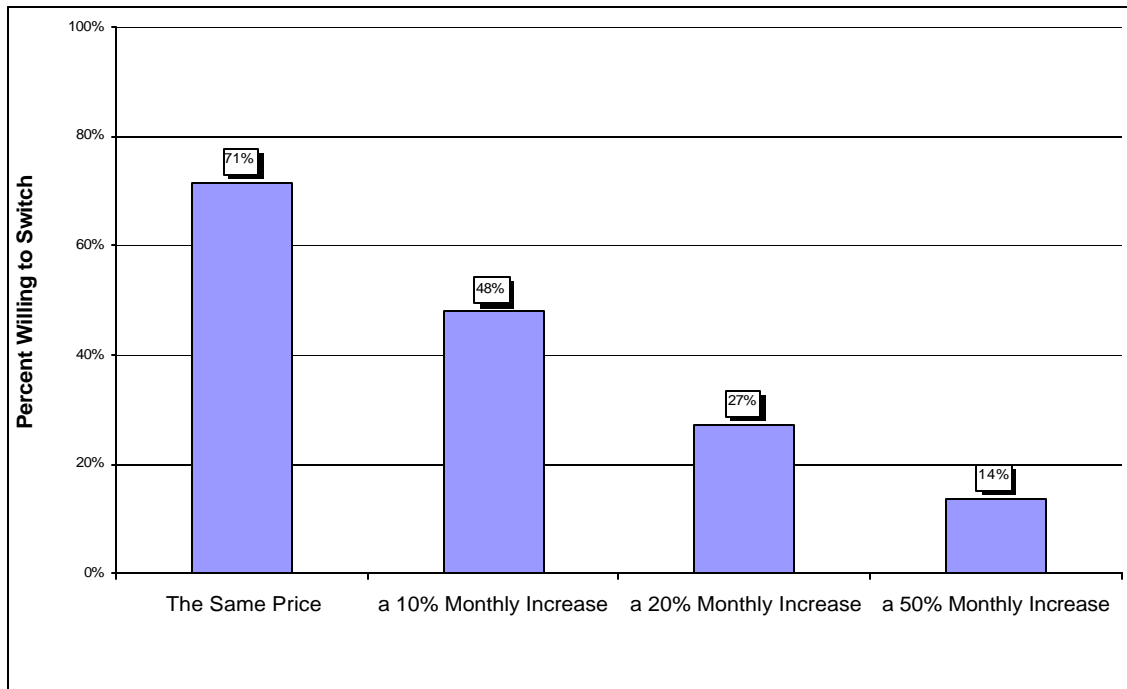
- 92% of respondents reported having an active Internet connection at the place of business. Of the businesses with an Internet connection, 85% said that the majority of their computers had Internet access. Businesses reported the following connection types:
 - 32% Cable Modem
 - 30% Phone Line - Dedicated Dial-Up
 - 18% Phone Line - Share with Voice Line
 - 7% DSL (Digital Subscriber Line)
 - 4% Full T1
 - 2% Fractional T1
 - 2% Satellite
 - 2% Wireless
 - 1% Frame Relay

Internet and Computer Use (continued)

- 34% of those that do not have an Internet connection said they plan to obtain a connection in the next year. An additional 21% said they may get a connection in the next year.
- 61% of Upper Peninsula business Internet subscribers pay less than \$50 per month for service, 16% pay more than \$100 per month.
- 62% of Upper Peninsula businesses have one Internet access line; 9% have five or more lines.
- Upper Peninsula businesses recorded the following levels of satisfaction with various aspects of Internet access:
 - Speed of connection: 48% satisfied
 - Price of services: 60% satisfied
 - Reliability: 60% satisfied
 - Choice of providers: 35% satisfied
- 53% of businesses indicated they have a company web site. Of these, 45% are hosted in their county.
- Of businesses without a web site, 40% indicate they don't plan to have a web site in the next two years.
- 69% of businesses indicate they have an e-mail server. Of these, 48% of the e-mail servers are located in the county.

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

Figure 1: Propensity to Switch Internet Providers for Better Service



Internet and Computer Use (continued)

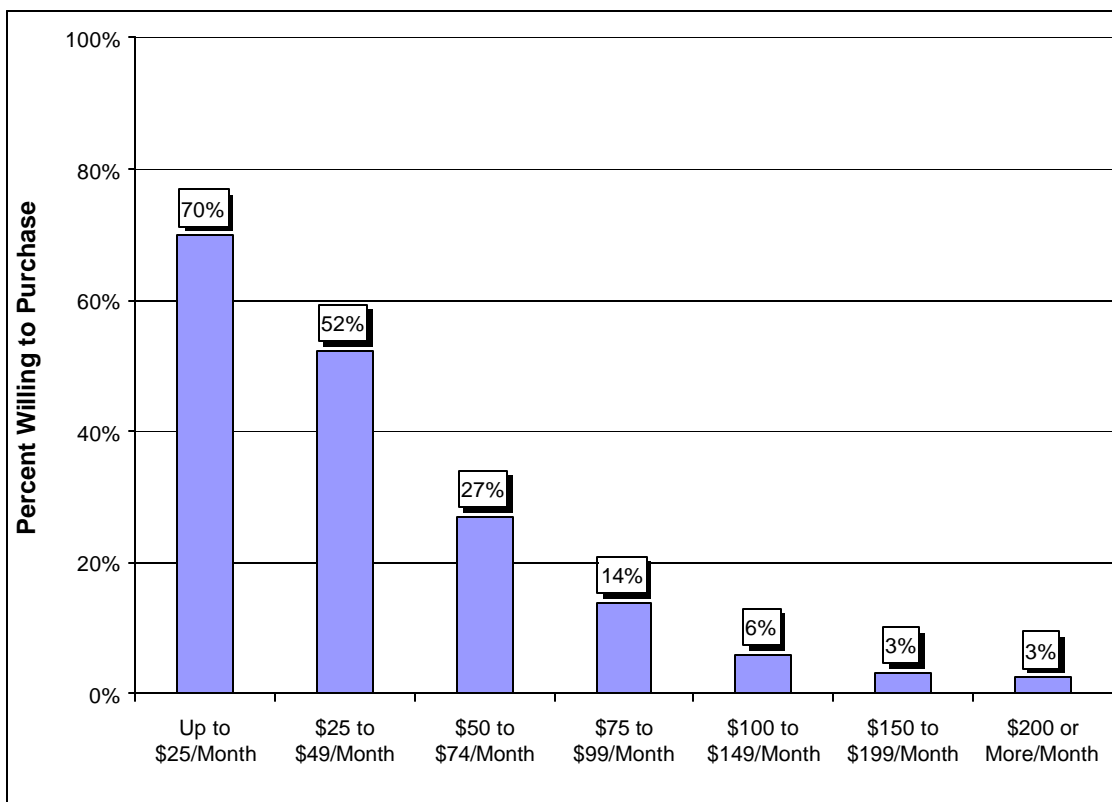
Figure 1 shows there is a strong negative reaction to small price increases for Upper Peninsula businesses. Strong marketing and awareness campaigns are often required in capturing customers for high-end products and services.

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

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

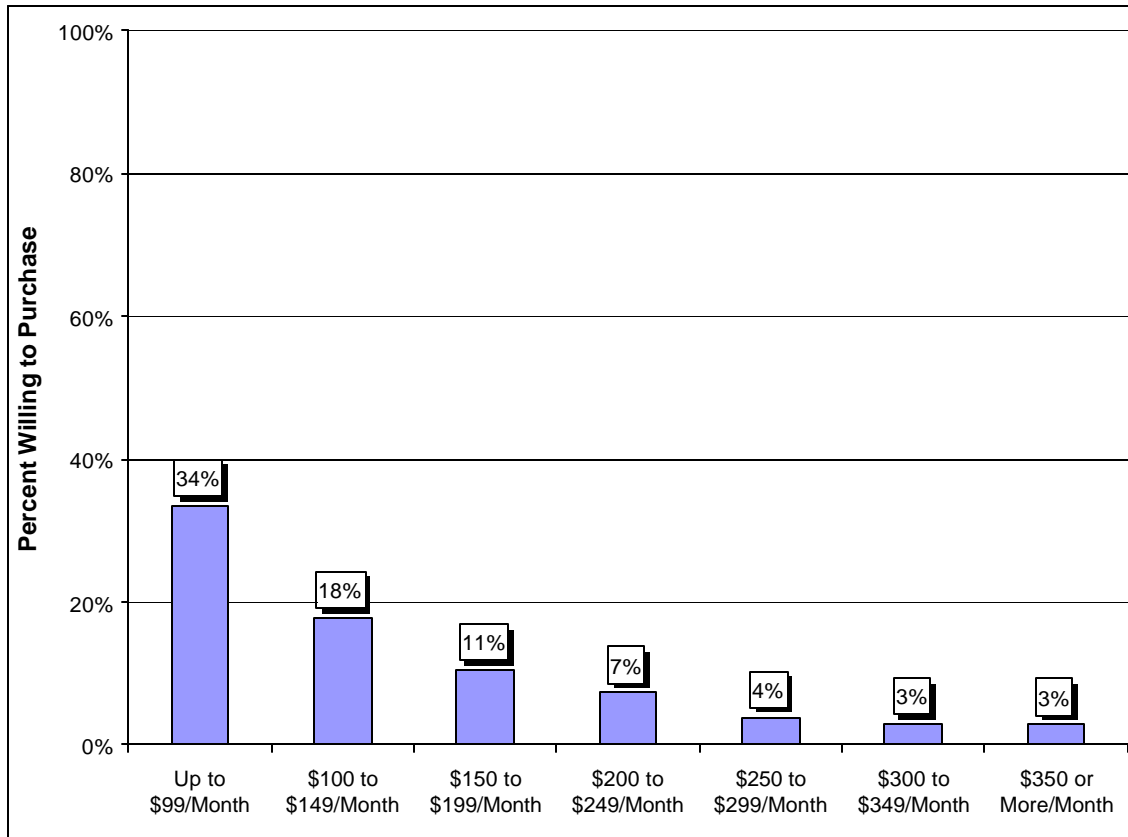
- **Upstream:** Data transfer from your location to the Internet.
- **Downstream:** Data transfer from the Internet to your location.
- **1,544 Kbps:** 1,544,000 bits per second (Example: would take approximately 1.5 minutes to transfer an average drawing (CAD) file; 15,000 K bytes)
- **256 Kbps:** 256,000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

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



Internet and Computer Use (continued)

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



- Upper Peninsula businesses were asked to estimate their future Internet access speed requirements. Their responses follow:
 - One year from now: 49% same as now; 29% five times or faster; 18% didn't know
 - Two years from now: 30% same as now; 42% five times or faster; 25% didn't know
 - Three years and beyond: 25% same as now; 41% five times or faster; 32% didn't know
- 45% Upper Peninsula business said that they would not allow telecommuting even if high-speed connections were available to employees from home; 28% said they would allow or already allow telecommuting.

Internet and Computer Use (continued)

- Upper Peninsula businesses also expressed interest in the following services:
 - Combined billing for Internet, telephone and utility services: 52% interested or somewhat interested; 1% already use
 - Distance learning: 33% interested or somewhat interested; 4% already use
 - Interactive education: 37% interested or somewhat interested; 3% already use
 - Premises Management/Security: 27% interested or somewhat interested; 2% already use
 - Video conferencing with customers/suppliers: 28% interested or somewhat interested; 3% already use
 - Video conferencing with other offices within company: 27% interested or somewhat interested; 3% already use

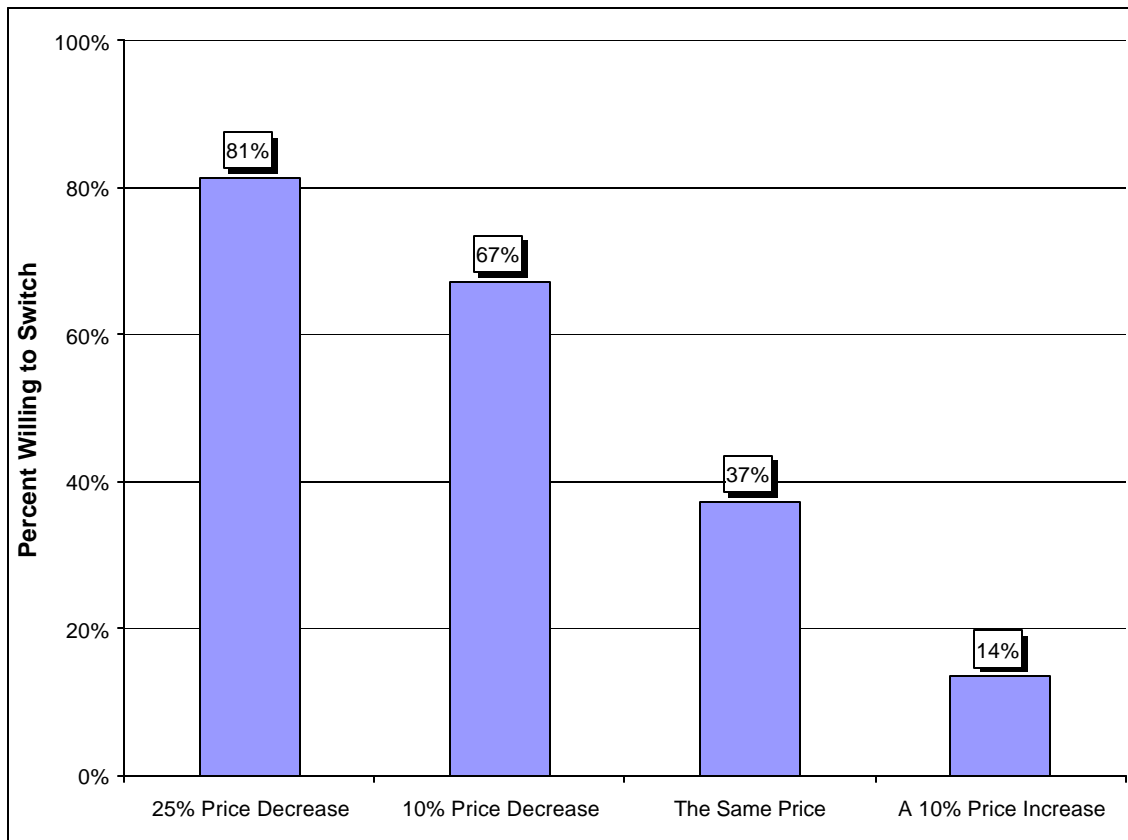
Telephone Service

- 61% of Upper Peninsula businesses reported having 2-4 separate telephone lines at their location. 10% reported one line; 29% have 5 or more lines.
- 80% of Upper Peninsula businesses have not considered VoIP (Voice over Internet Protocol). 7% considered VoIP, but did not decide to use it. None already use VoIP.
- 55% of businesses use the DSO (standard business line) type of telephone line. 6% use T1/T3 lines. The remainder (39%) didn't know.
- Upper Peninsula businesses reported the following monthly telephone bill amounts:
 - 29% pay \$99 or less
 - 41% pay more than \$200

Upper Peninsula businesses were asked how willing they would be to switch local telephone providers for a provider with similar product offering at various price levels. Figure 4 shows the results of this analysis.

Telephone Service (continued)

Figure 4: Propensity to Switch Telephone Providers



Fiber Optic Connection

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

- 39% of respondents indicated they are interested in a fiber optic link within their community. 41% of respondents were not sure of their interest.
- 32% of Upper Peninsula businesses responded that they would be interested in a fiber optic connection with other communities outside of their community. An additional 33% said they may be interested.

Fiber Optic Connection (continued)

- 36% of businesses responded that they would be interested in a fiber optic connection with offices or locations outside of their county. An additional 31% indicated that they may be interested. The city or region of these locations follow:
 - 38% Area 1 (Gogebic, Ontonagon, Houghton, Keweenaw)
 - 50% Area 2 (Baraga, Iron, Marquette)
 - 39% Area 3 (Dickinson, Menominee, Delta)
 - 31% Area 4 (Alger, Schoolcraft, Luce)
 - 32% Area 5 (Chippewa, Mackinac)
 - 20% Area 6 (Emmet, Cheboygan, Presque Isle)
 - 21% Area 7 (Antrim, Grand Traverse, Leelanau, Benzie)
 - 16 Area 8 (Otsego, Montmorency, Alpena)
 - 16% Area 9 (Kalaska, Crawford, Oscoda, Alcona)
 - 45% Area 10 (Lower Peninsula of Michigan)
 - 32% Area 11 (Detroit/Grand Rapids/Kalamazoo Areas)
 - 38% Area 12 (Green Bay, Milwaukee, Madison)
 - 34% Area 13 (Northern Wisconsin)

- Of businesses that indicated interest in establishing a fiber optic connection with other regions within the U.S., the level of interest in each region follows:
 - 30% Central
 - 60% Midwest
 - 28% Northeast
 - 20% Northwest
 - 22% South
 - 27% Southeast
 - 26% Southwest

- Of businesses that indicated interest in establishing a fiber optic connection with international regions, the level of interest in each region follows:
 - 4% Africa
 - 5% Asia
 - 5% Australia
 - 19% Canada
 - 4% Central America
 - 11% Europe
 - 6% Mexico
 - 4% Middle East
 - 4% South America

Customer Value Management (CVM)

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

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

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

Table 1: Comparison of Utility Performance Measures

<u>Utility</u>	SCORE SUMMARY (7 highest, 1 lowest)					
	<u>% Less Than 3</u>	<u>Average Overall Performance</u>	<u>% Greater Than 5</u>	<u>% Less Than 3</u>	<u>Average Overall Satisfaction</u>	<u>% Greater Than 5</u>
Electric	3%	4.8	32%	4%	4.7	31%
Local Telephone	10%	4.2	17%	13%	4.0	17%
Cable Television	13%	4.0	15%	17%	3.8	14%
Internet	8%	4.4	24%	10%	4.3	26%
Cellular Telephone	22%	3.6	10%	23%	3.5	11%

As seen, the electric scored relatively high compared to the other utilities and cellular telephone providers scored relatively low compared to other utilities.

Survey Response Data

To assess business use and needs, all businesses in the UP were mailed a survey booklet, of which 965 were completed. The tolerance interval for 965 responses at the 95 percent confidence level is ± 3.1 percent. That is, one can estimate that 19 times out of 20, the true characteristic of the entire population is within ± 3.1 percent of what the survey data indicate. (Figures are based off of total number of UP businesses of 14,660.)

Upper Peninsula Aggregate

Business Survey Summary

Section 2:

Business Survey Responses

Upper Peninsula Aggregate

Business Survey

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Section 2: Business Survey Responses

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Q6a	Indicate the regions of Michigan with which you exchange data:	5
Q6b	Indicate the regions in the United States with which you exchange data:	6
Q6c	Indicate the international regions with which you exchange data:	7
Q7	Likelihood that your business will use the Internet in the following ways in the next two years	8
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Q7b	Access information (suppliers, competitors, other)	
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Q7d	Engage in retail electronic commerce (to consumers)	
Q7e	Develop new products via the Internet (i.e. CAD/CAM, E-engineering)	
Q7f	Market new products via the Internet	
Q7g	Inventory management	
Q7h	Recruit employees	
Q7i	Provide technical support and service to customers	
Q7j	Develop ability for employees to work from their homes	
Q8	How many personal computers/workstations do you have at this location?.....	9
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Q22b	\$25 to \$49 per month	
Q22c	\$50 to \$74 per month	
Q22d	\$75 to \$99 per month	
Q22e	\$100 to \$149 per month	
Q22f	\$150 to \$199 per month	
Q22g	\$200 or more per month	
Q23	Willingness to purchase Internet service that offers AT LEAST 1,544 Kpbs downstream AND upstream data rates for:	26
Q23a	Up to \$99 per month	
Q23b	\$100 to \$149 per month	
Q23c	\$150 to \$199 per month	
Q23d	\$200 to \$249 per month	
Q23e	\$250 to \$299 per month	
Q23f	\$300 to \$349 per month	
Q23g	\$350 or more per month	
Q24	What is your likely capacity (speed) need for Internet access in the future:	
Q24a	One year from now	27
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Q24c	Three years from now and later	29
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Business Survey

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Section 2: Business Survey Responses

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Q29c	\$100 to \$199	
Q29d	\$200 to \$299	
Q29e	\$300 to \$499	
Q29f	More than \$500	
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Q30b	A 10% price decrease?	
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Q31	Are you interested in a fiber interconnection within your community?.....	36
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Q35a	Indicate the regions of Michigan with which you are interested in a fiber optic interconnection:.....	39
Q35b	Indicate the regions in the United States with which you are interested in a fiber optic interconnection:.....	40
Q35c	Indicate the international regions with which you are interested in a fiber optic interconnection:	41
Q48	Interest in purchasing/receiving the following services:	42
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Q48d	Premises management/security?	
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Q49	Business Type: (CHECK ONLY ONE)	43
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UPLink

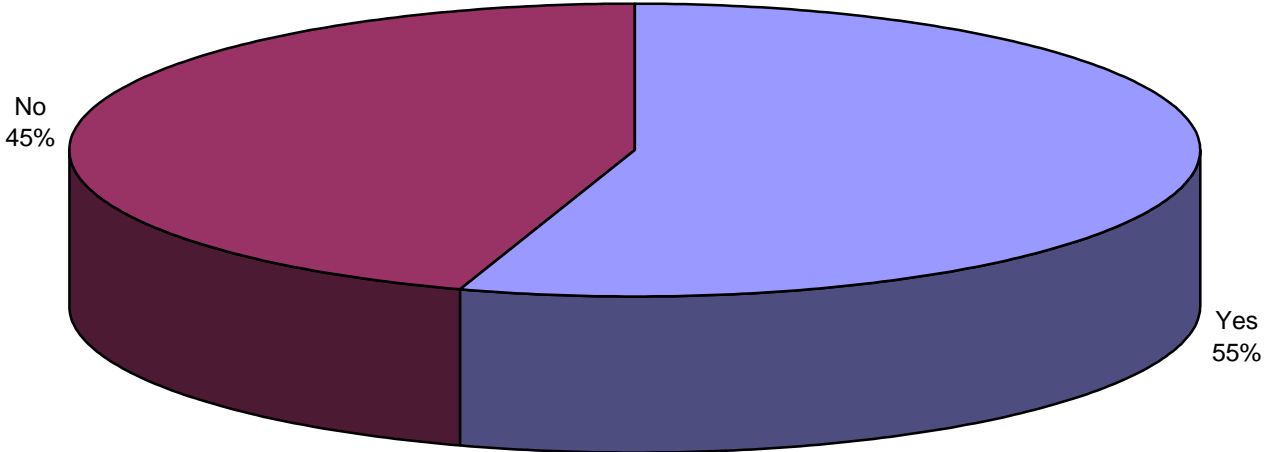
Business Survey

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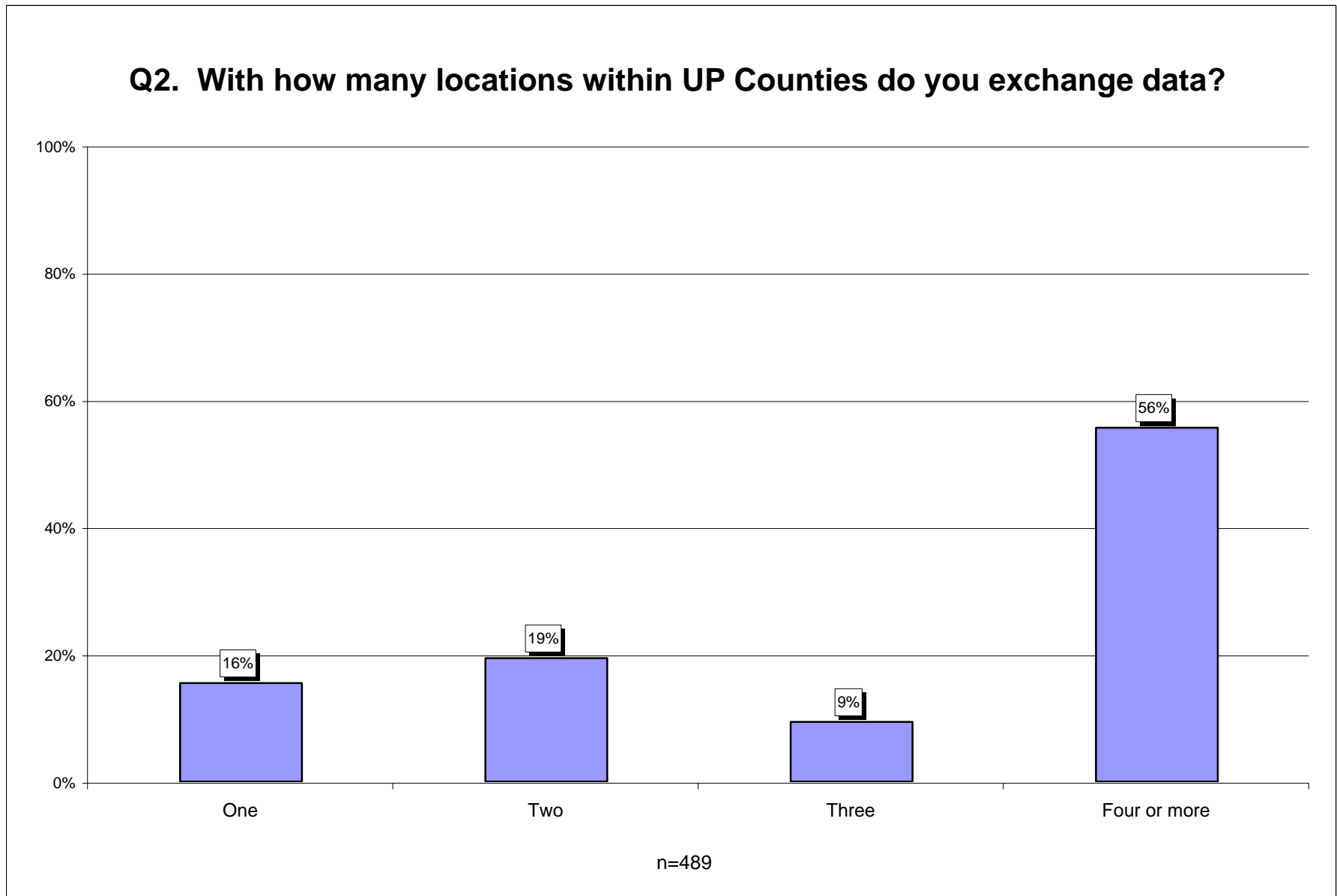
Section 2: Business Survey Responses

Q51	How many employees work at this location?	46
Q52	Is this location the organization's headquarters or division headquarters?.....	47
Q53	Where are telecommunication decisions made in this organization?	48
Q54	Which market structure will best supply your Internet and other communication services?	49
Q55	What do you think the MAIN role of the government should be to help ensure broadband Internet access is available and affordable?	50

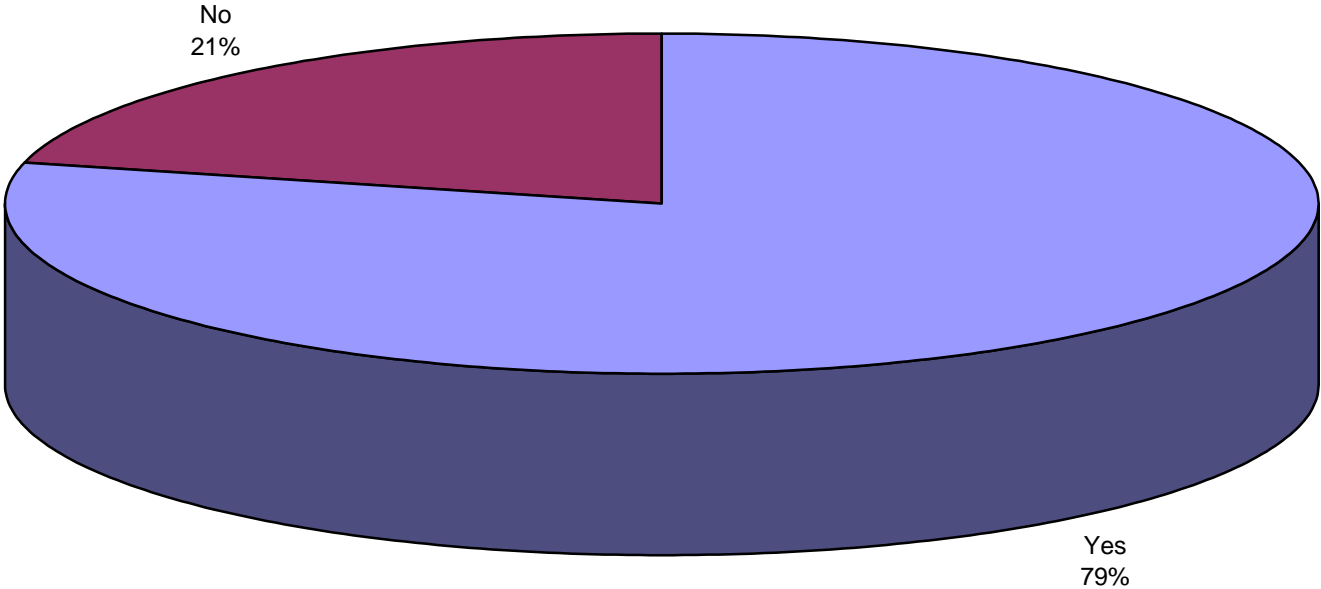
Q1. Are there locations within UP Counties with which you exchange data?



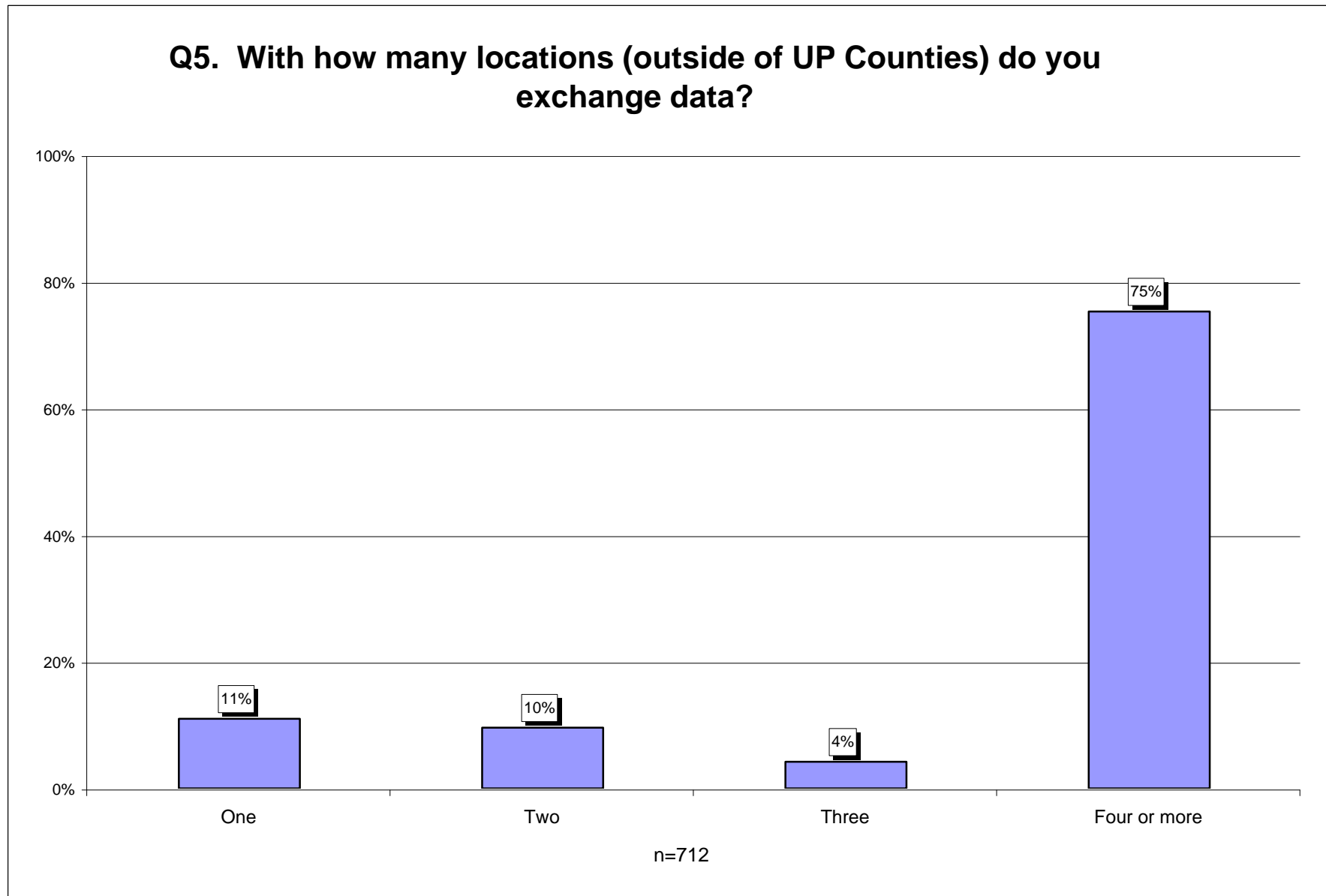
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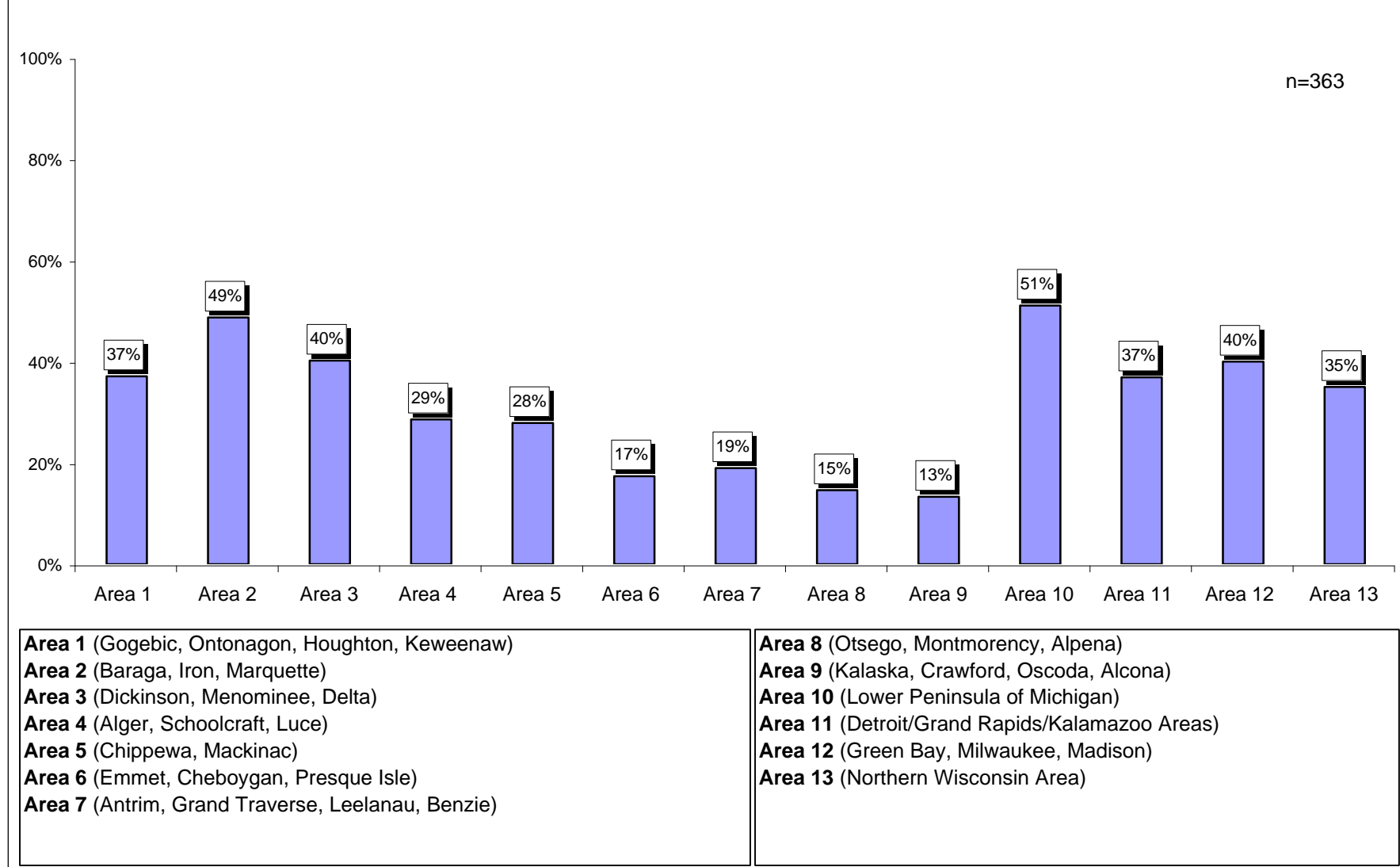
Q4. Are there locations (outside of UP Counties) with which you exchange data?

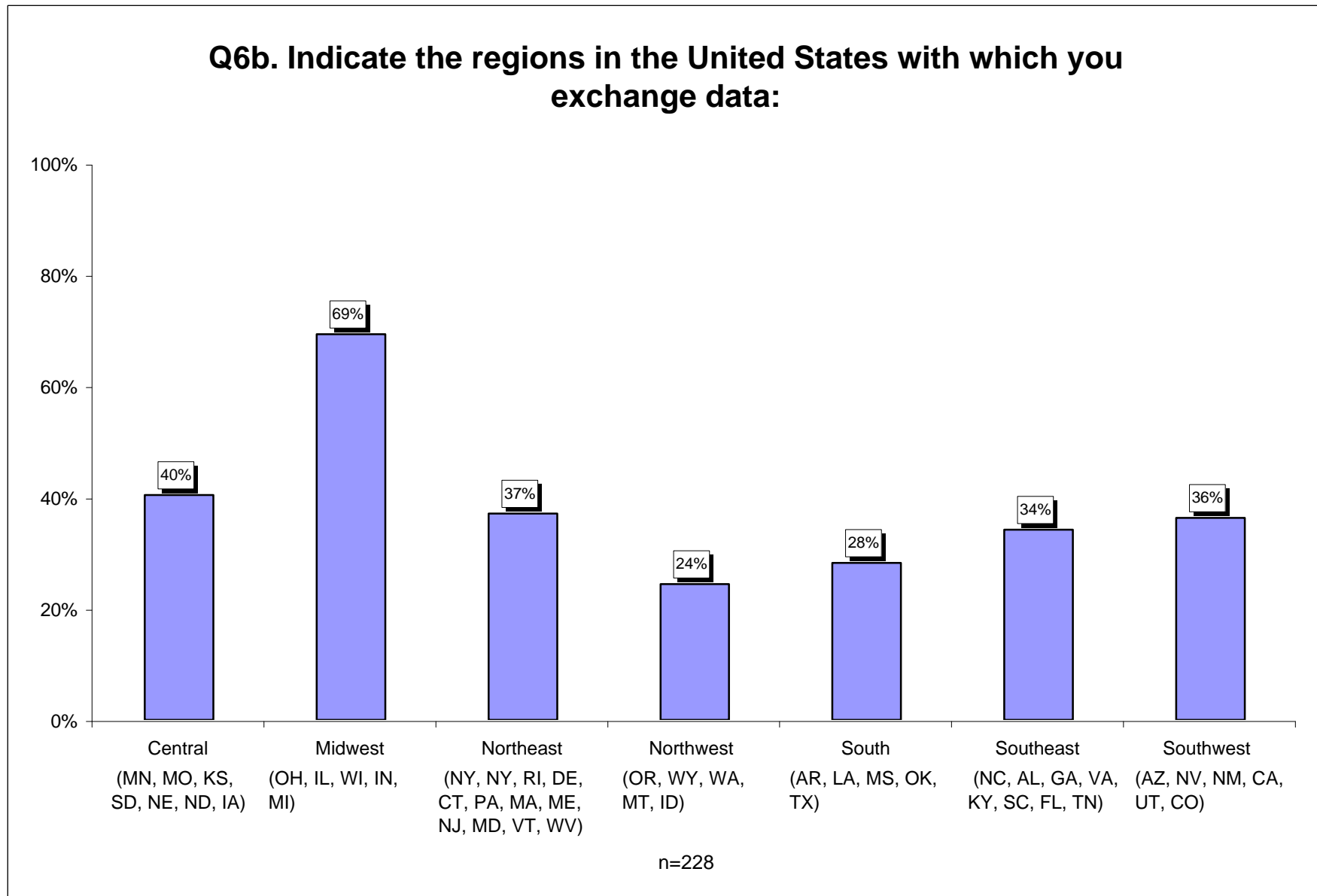


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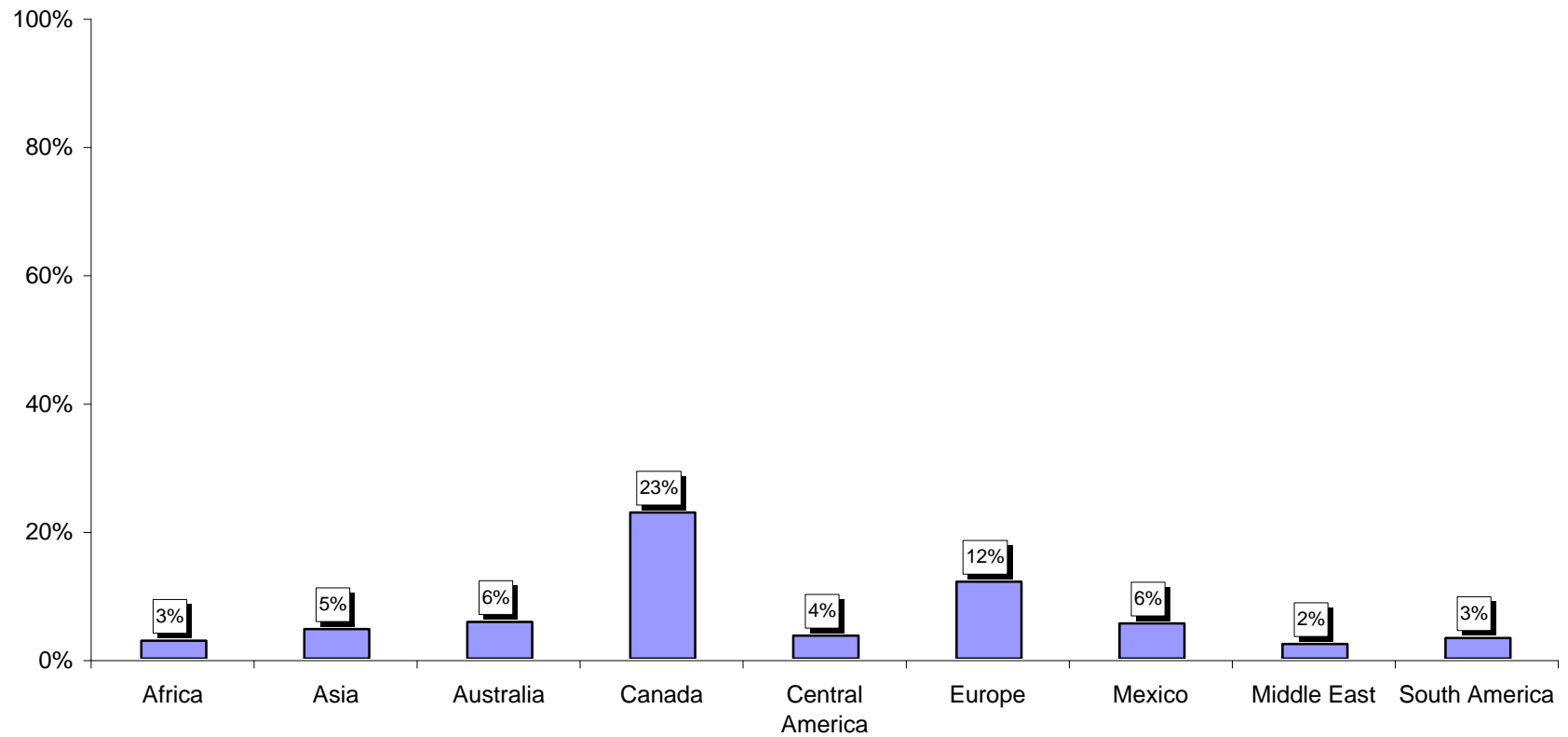


Q6a. Indicate the regions of Michigan with which you exchange data:

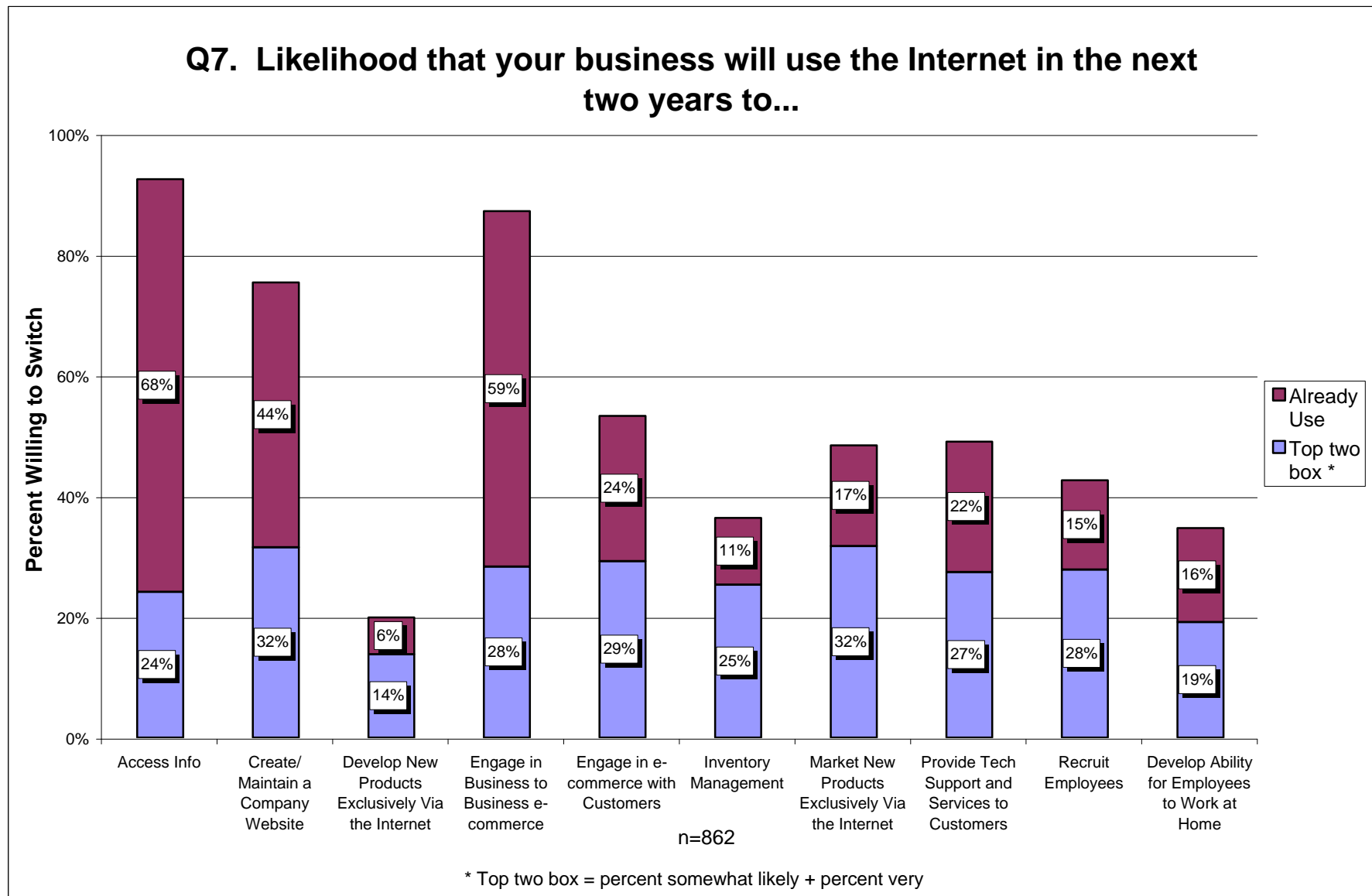


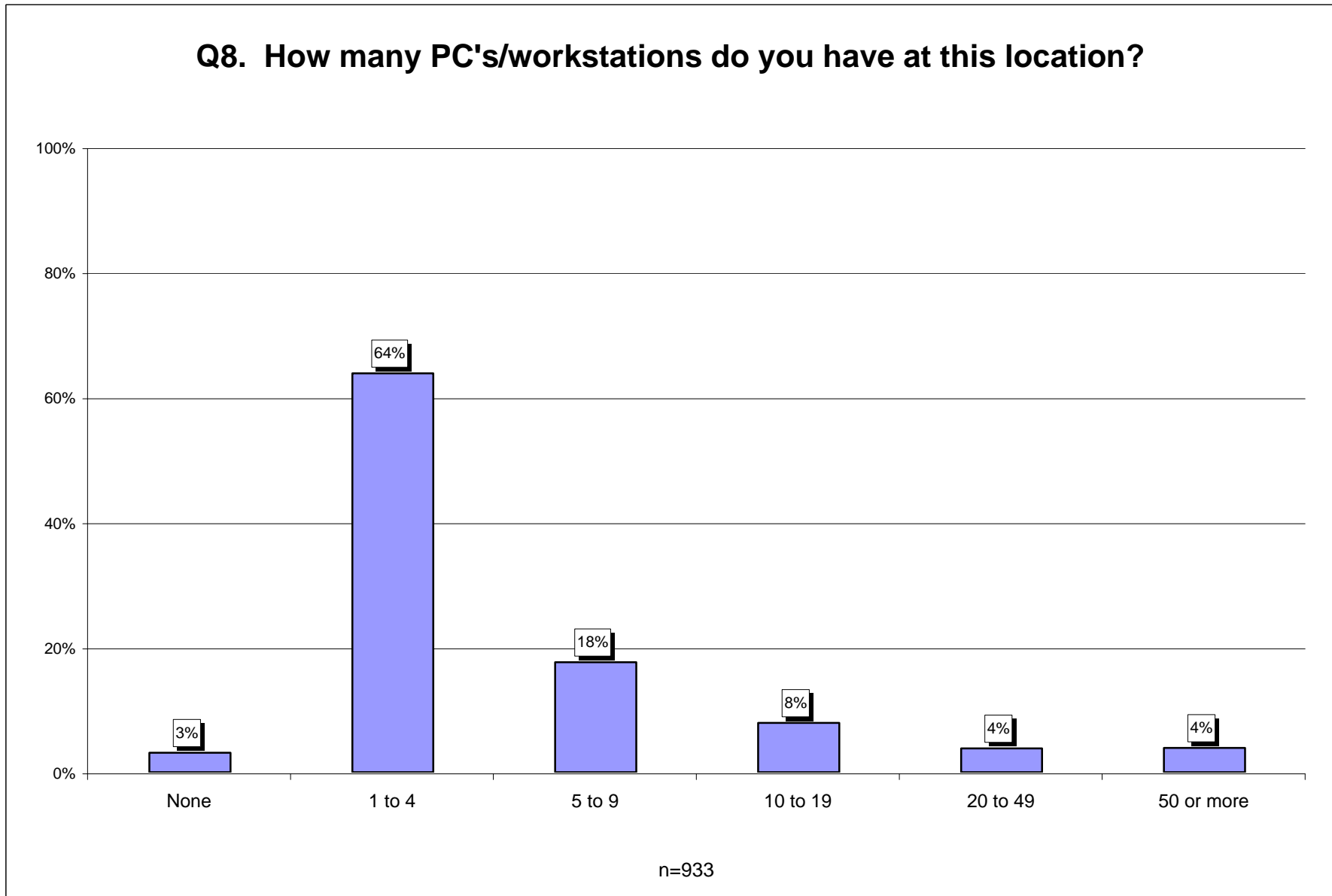


Q6c. Indicate the international regions with which you exchange data:

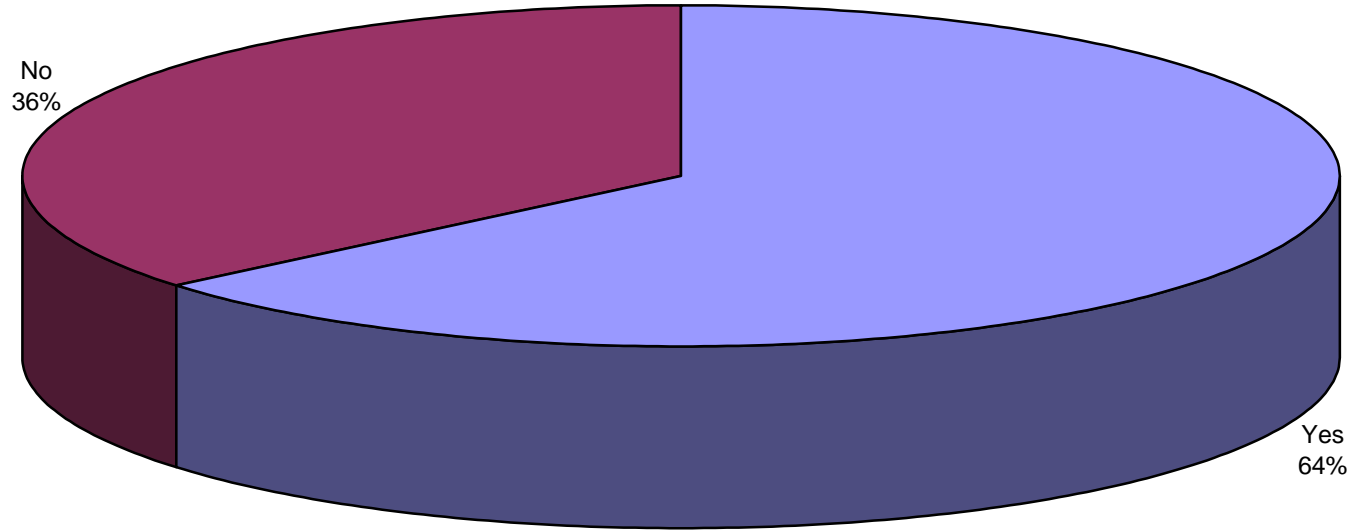


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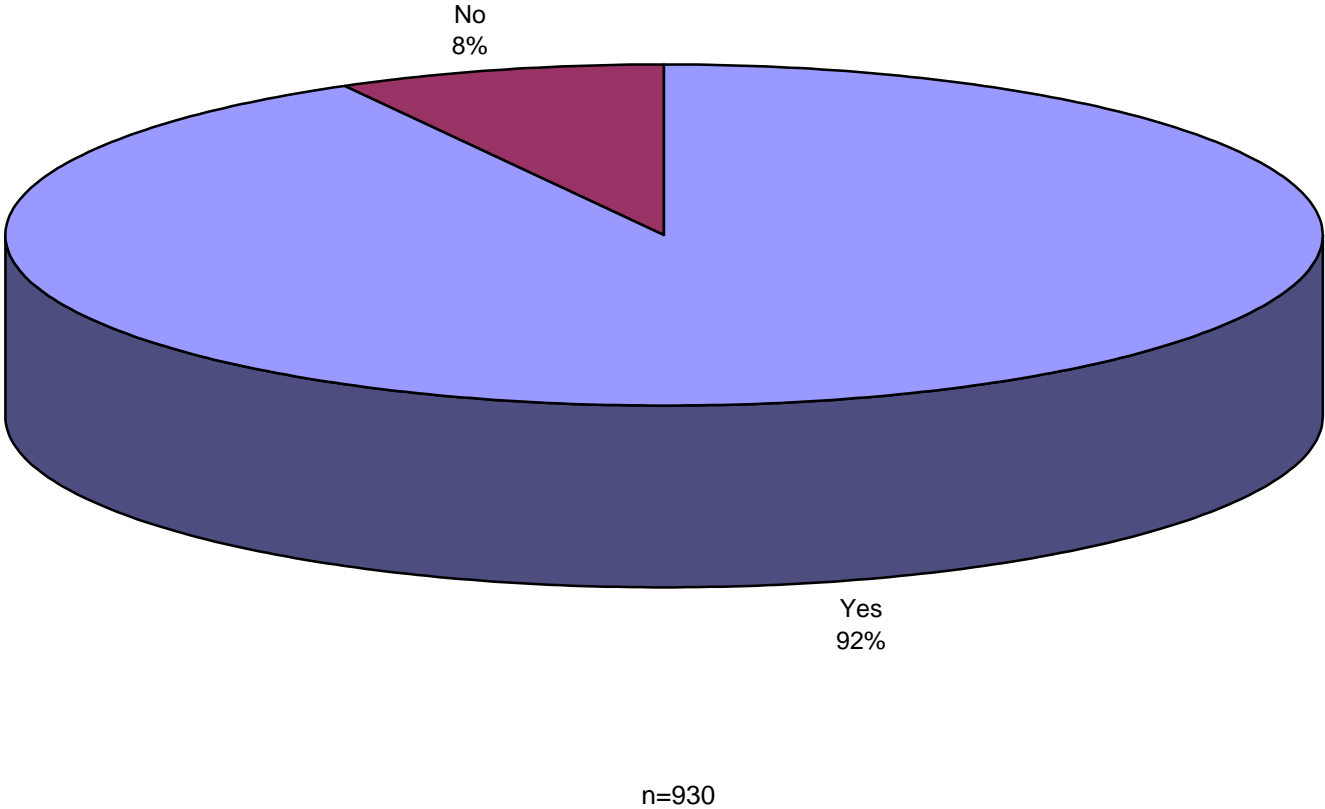


Q9. Are your computers connected with a Local Area Network (LAN)?

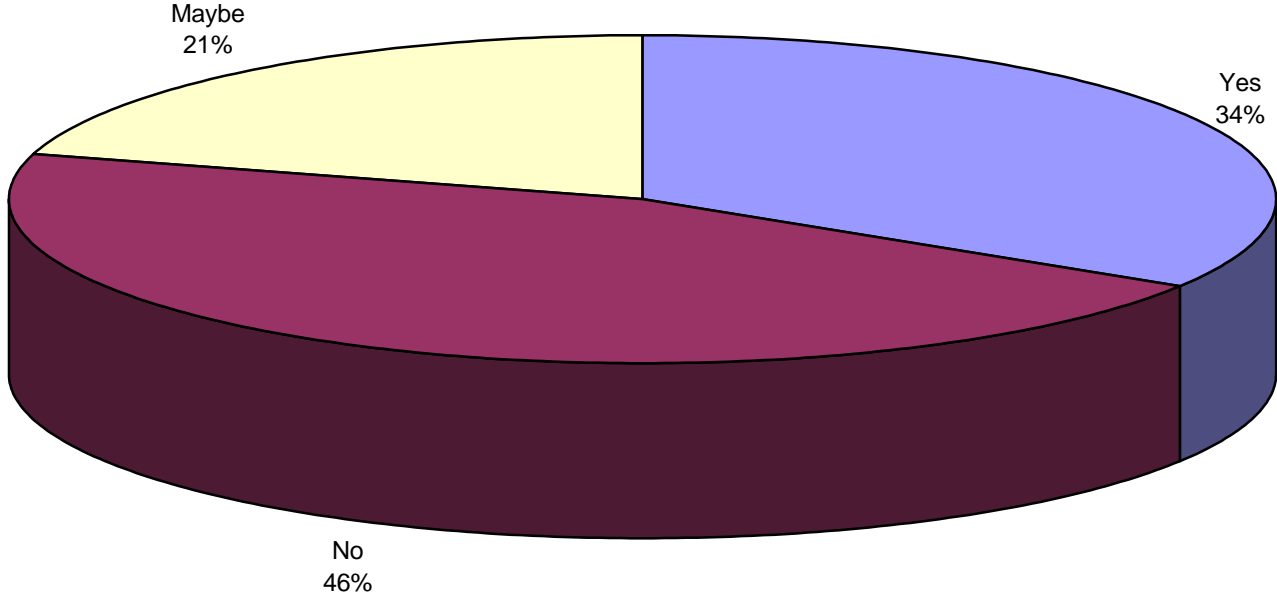


n=905

Q10a. Do you have Internet access from this location?

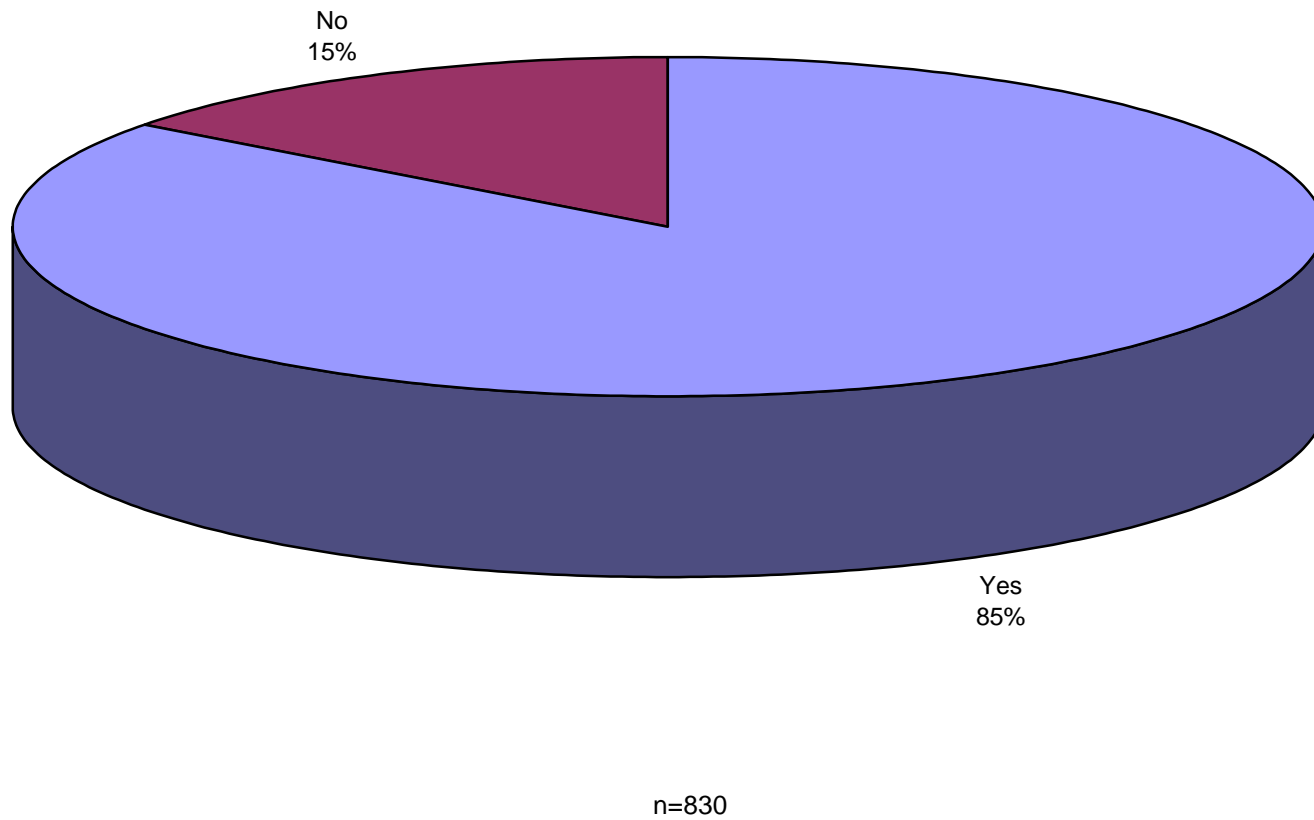


Q10b. Do you plan to obtain Internet access in the next year?

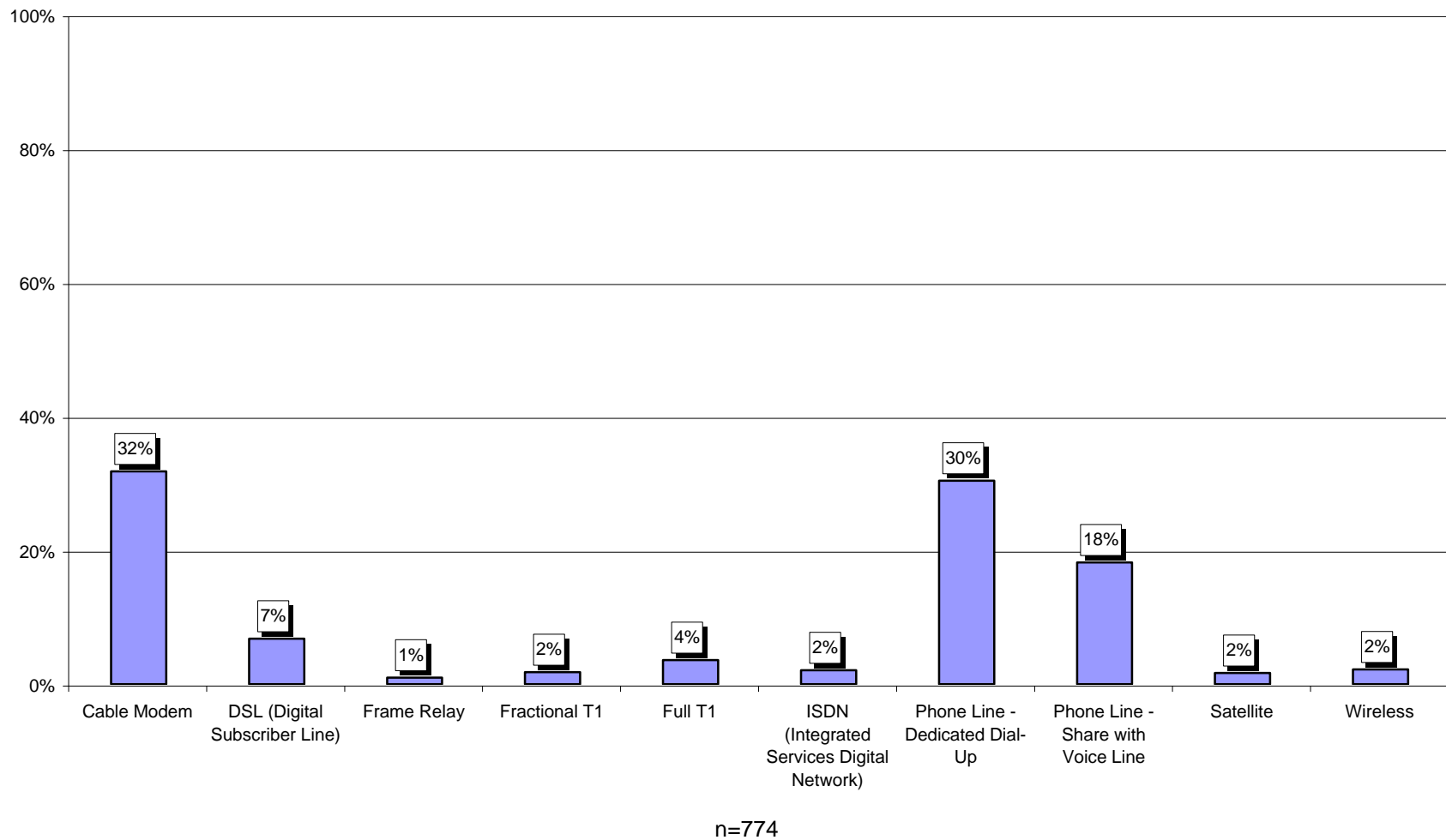


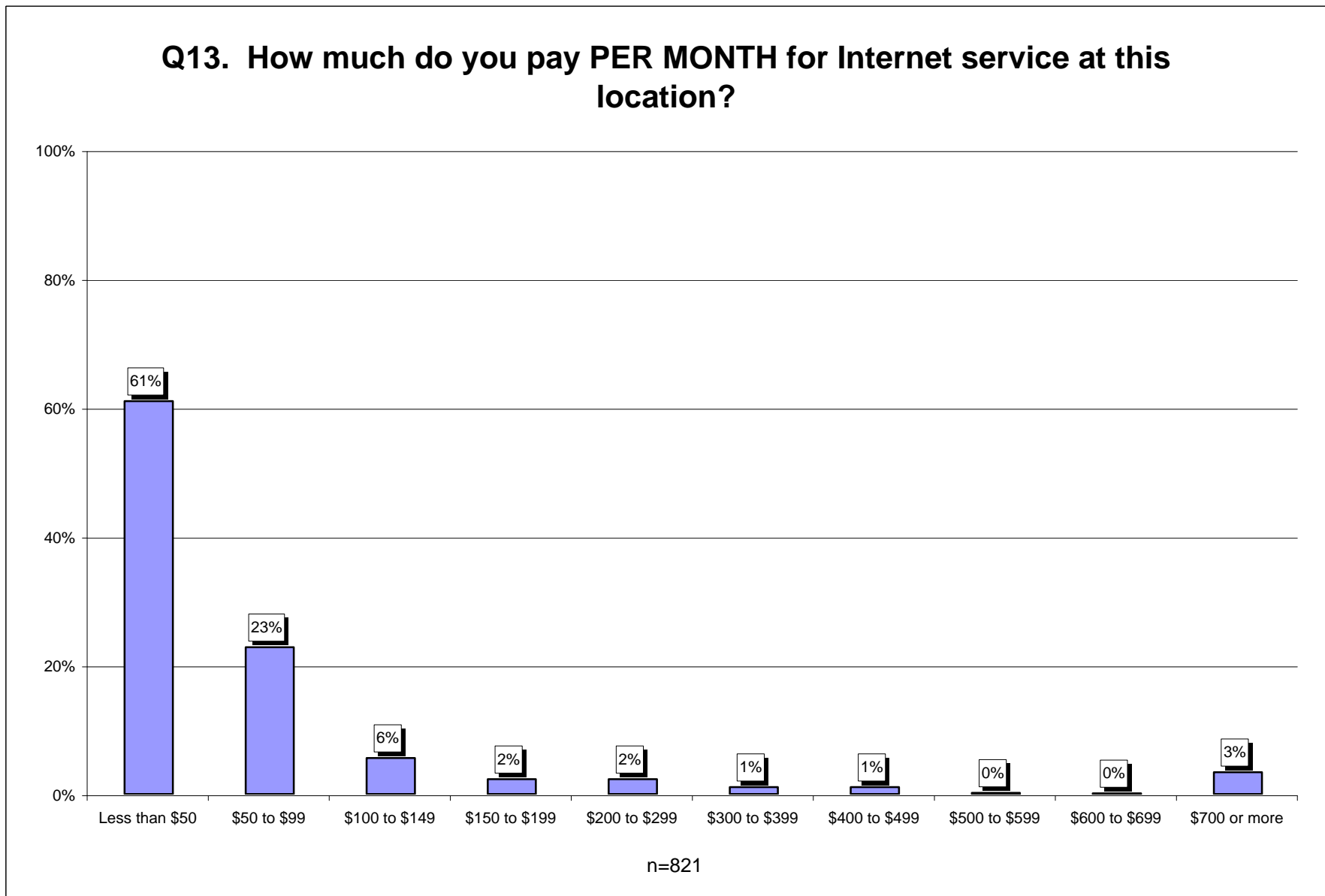
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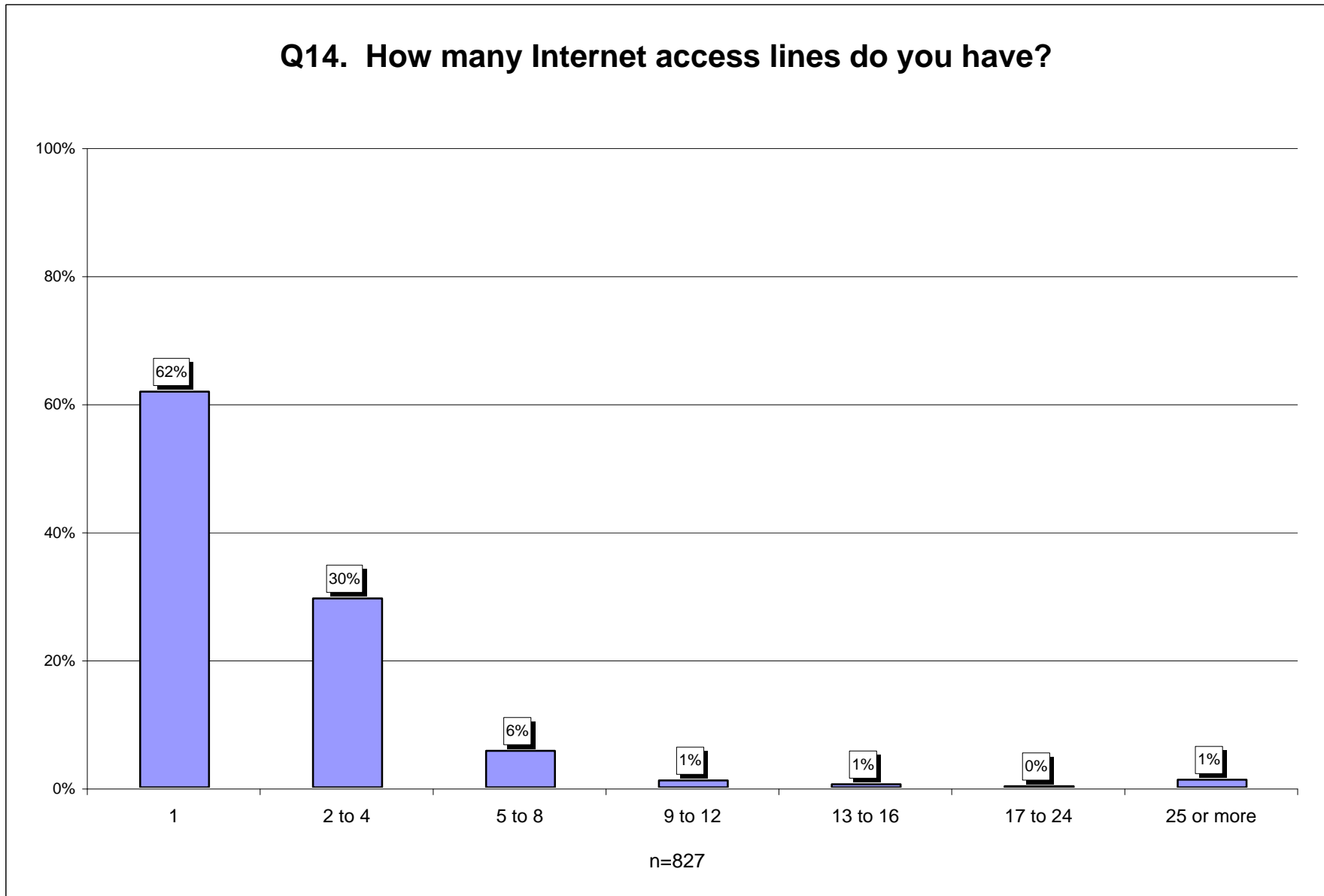
Q11. Do the majority of your computers have Internet access?



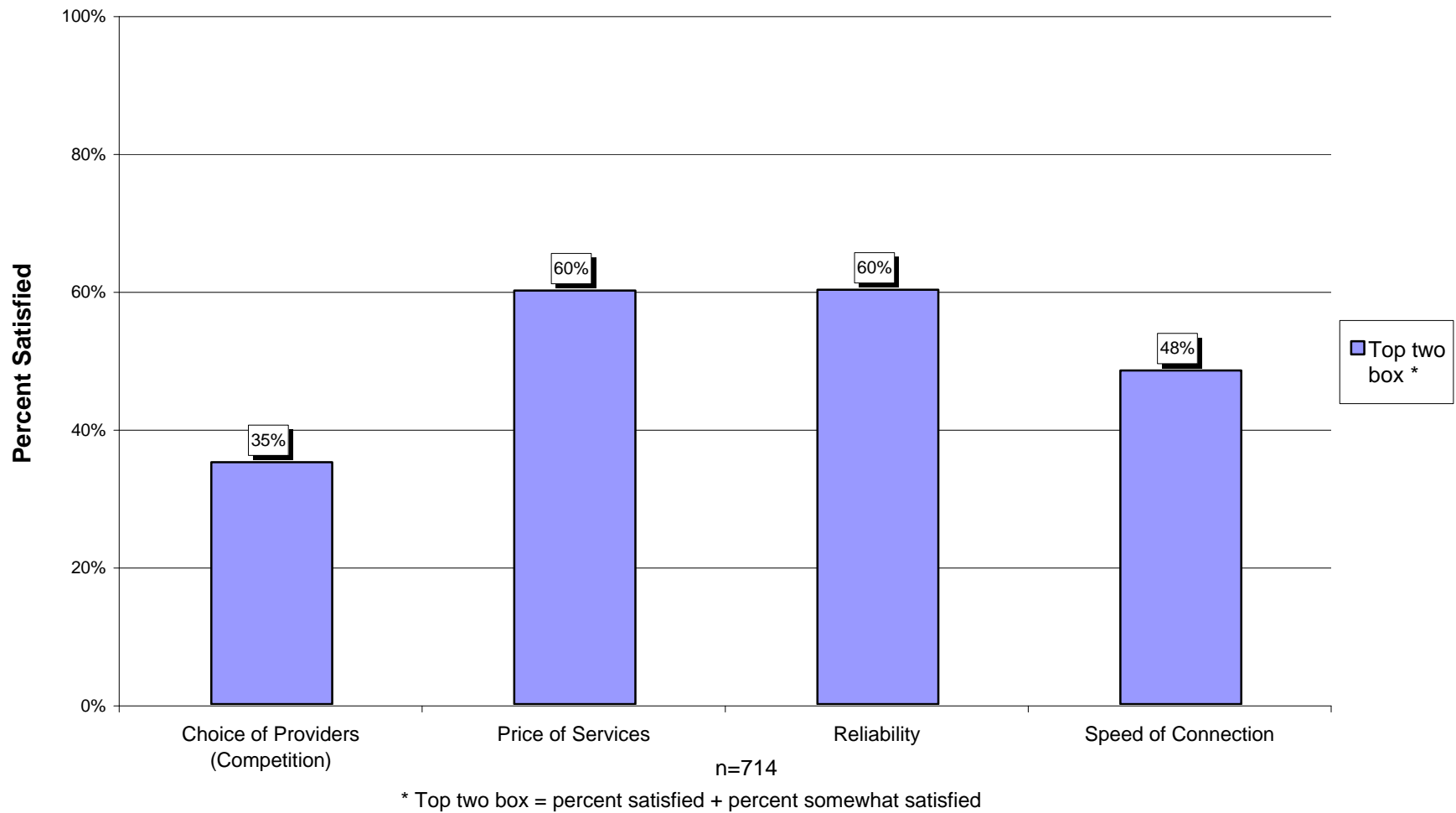
Q12. How does your firm connect to the Internet



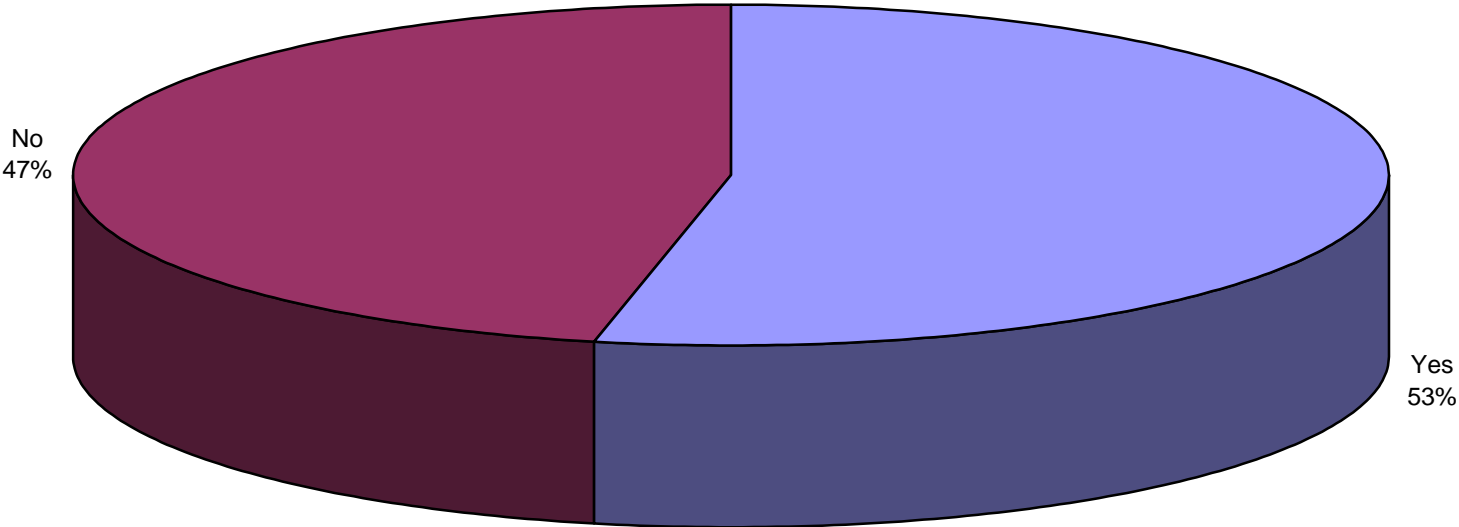




Q15. How satisfied are you with the following characteristics of your current Internet service?

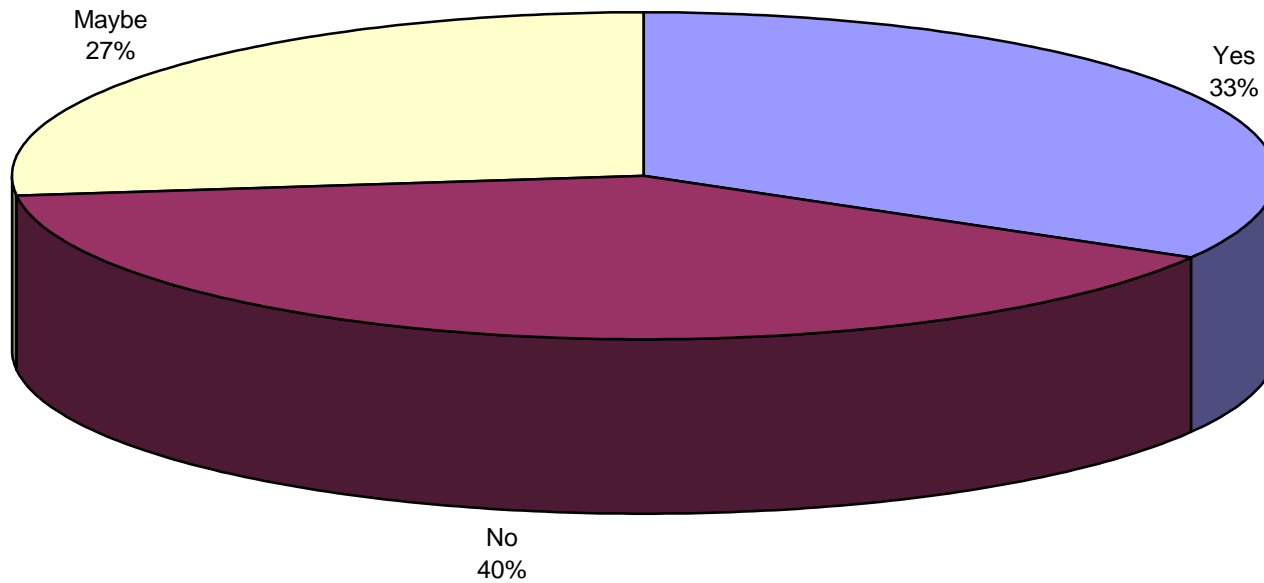


Q16. Do you have a company Web site?



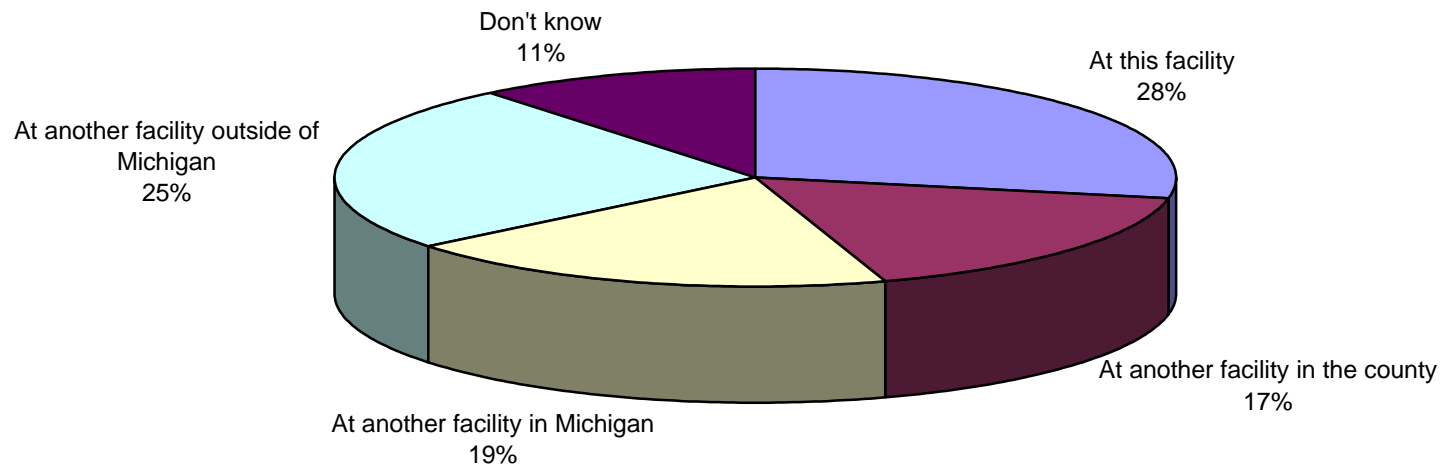
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Q17. If you don't currently have a company Web site, do you plan to have a company Web site in the future?



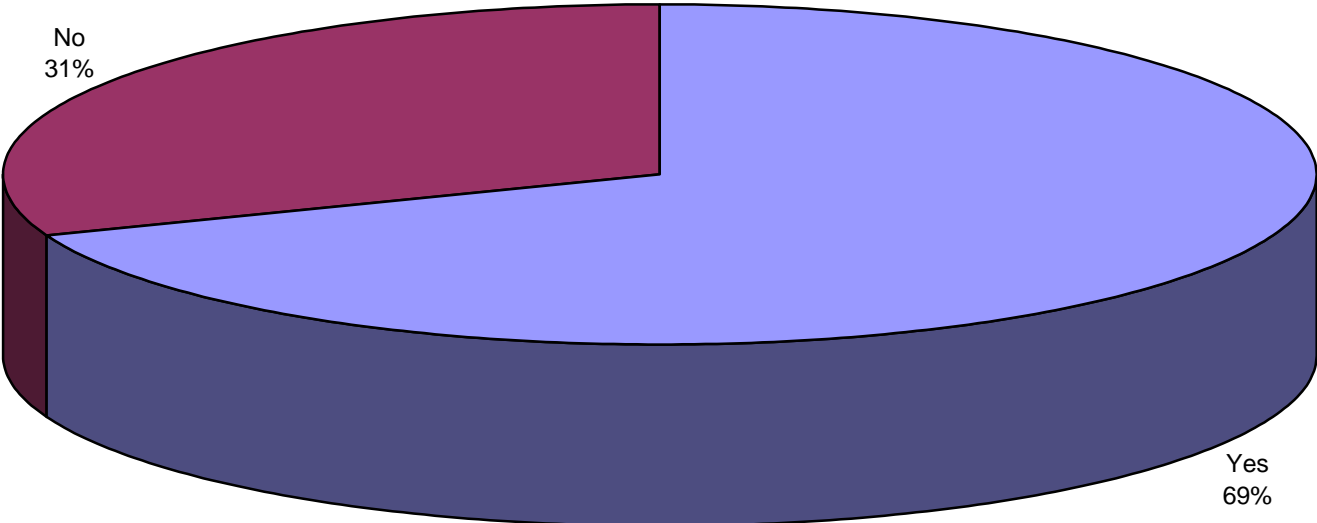
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Q18. Indicate where your Web site is hosted or is planned to be hosted:



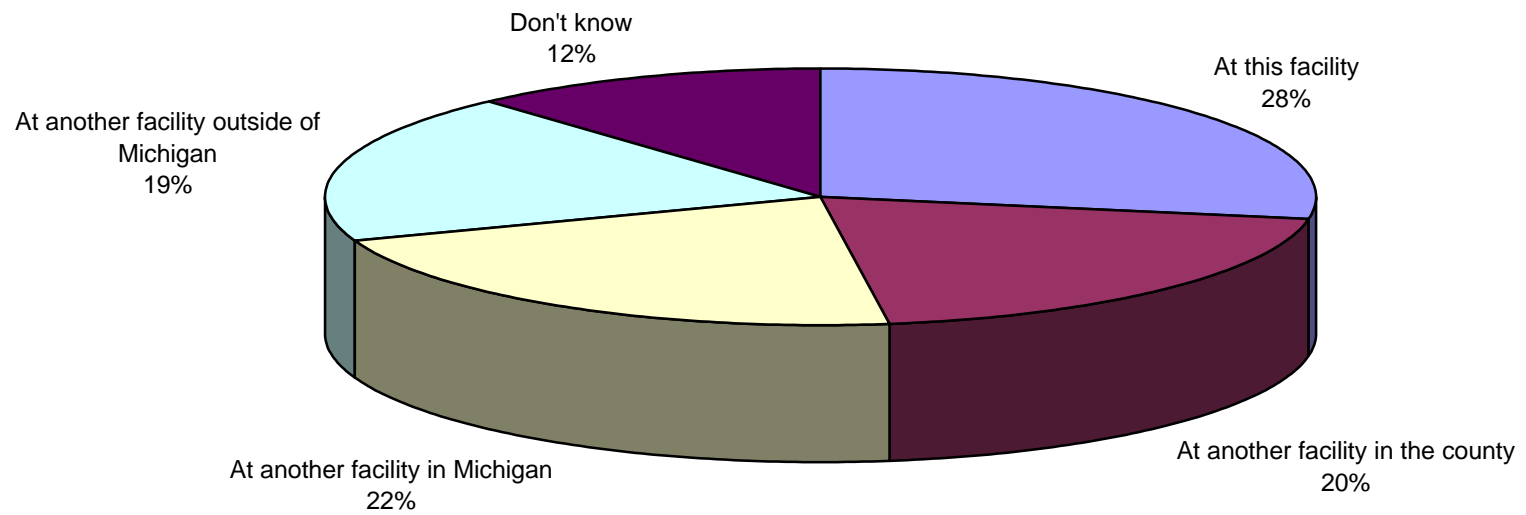
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Q19. Do you have an e-mail server?



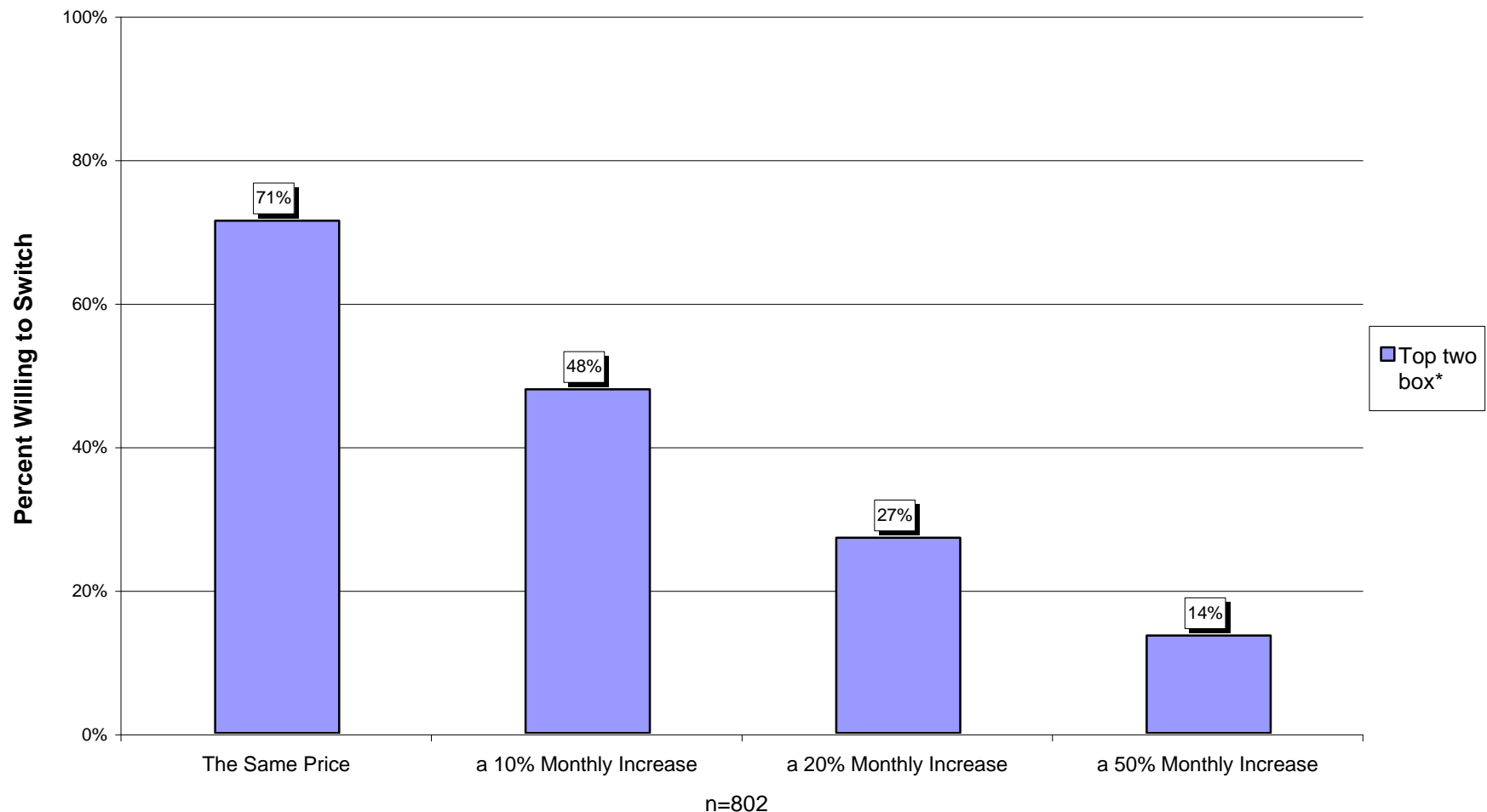
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Q20. Indicate where your e-mail server is located:



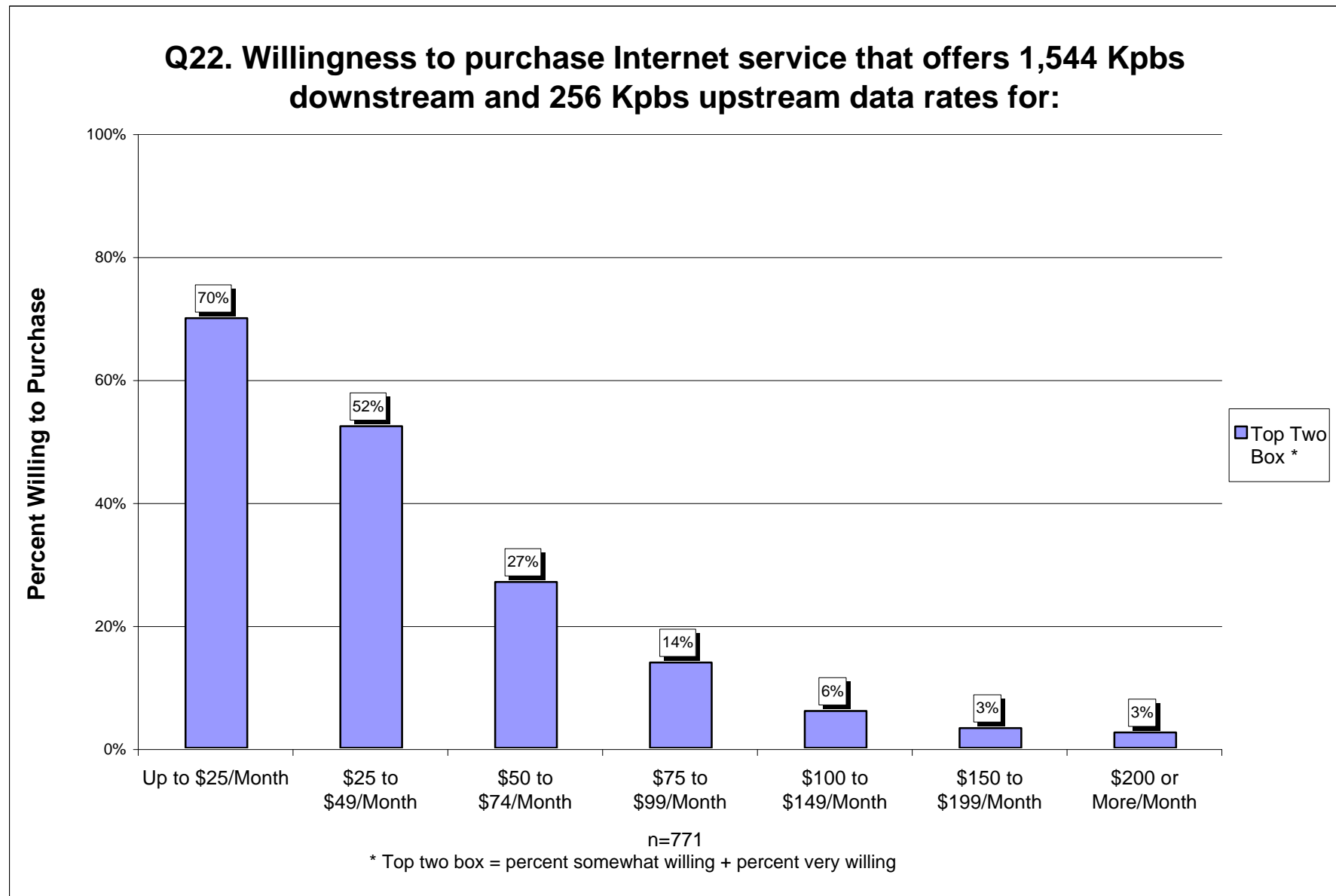
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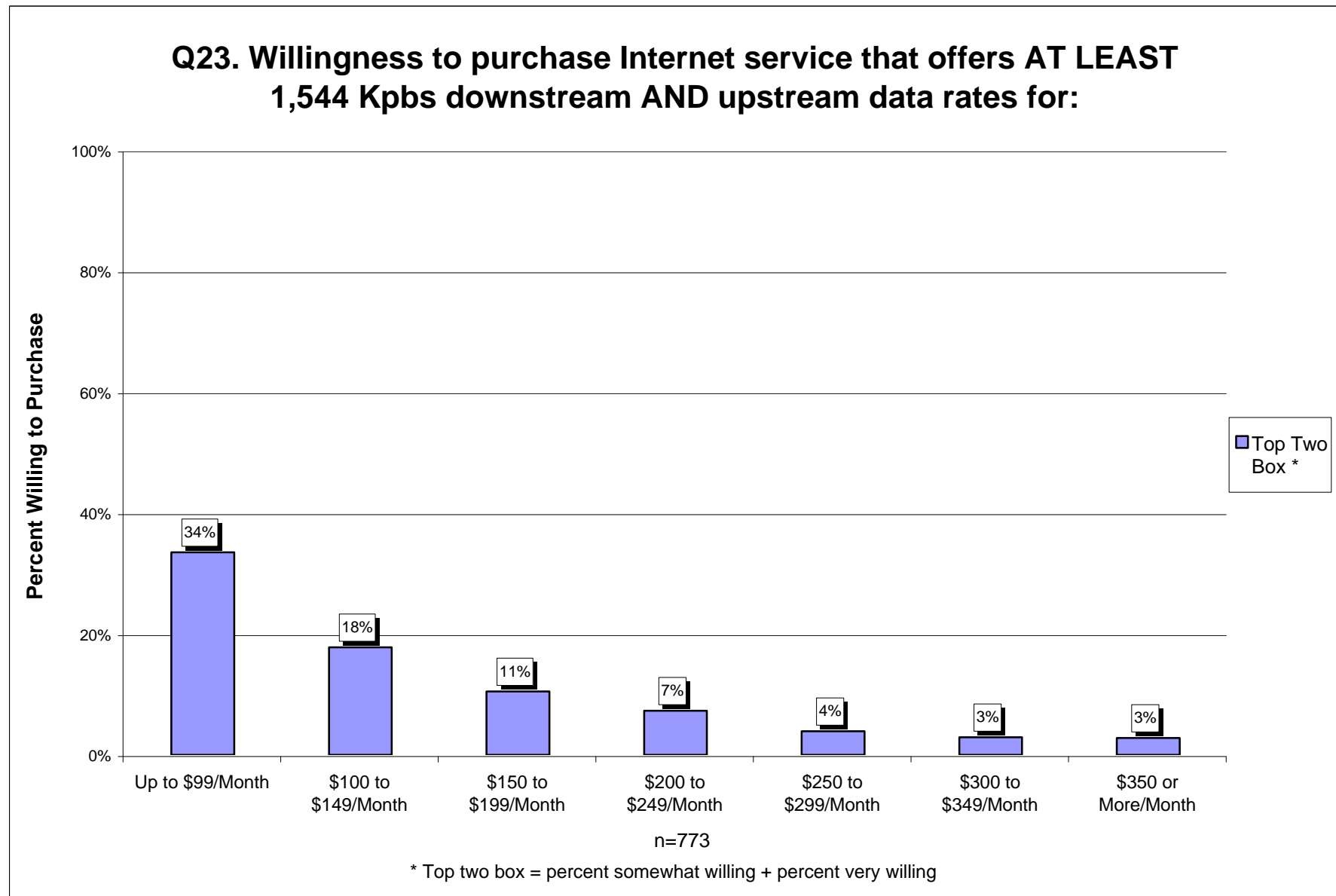
Q21. How willing would you be to switch to a service that offers an increased connection speed while being on-line all of the time for:

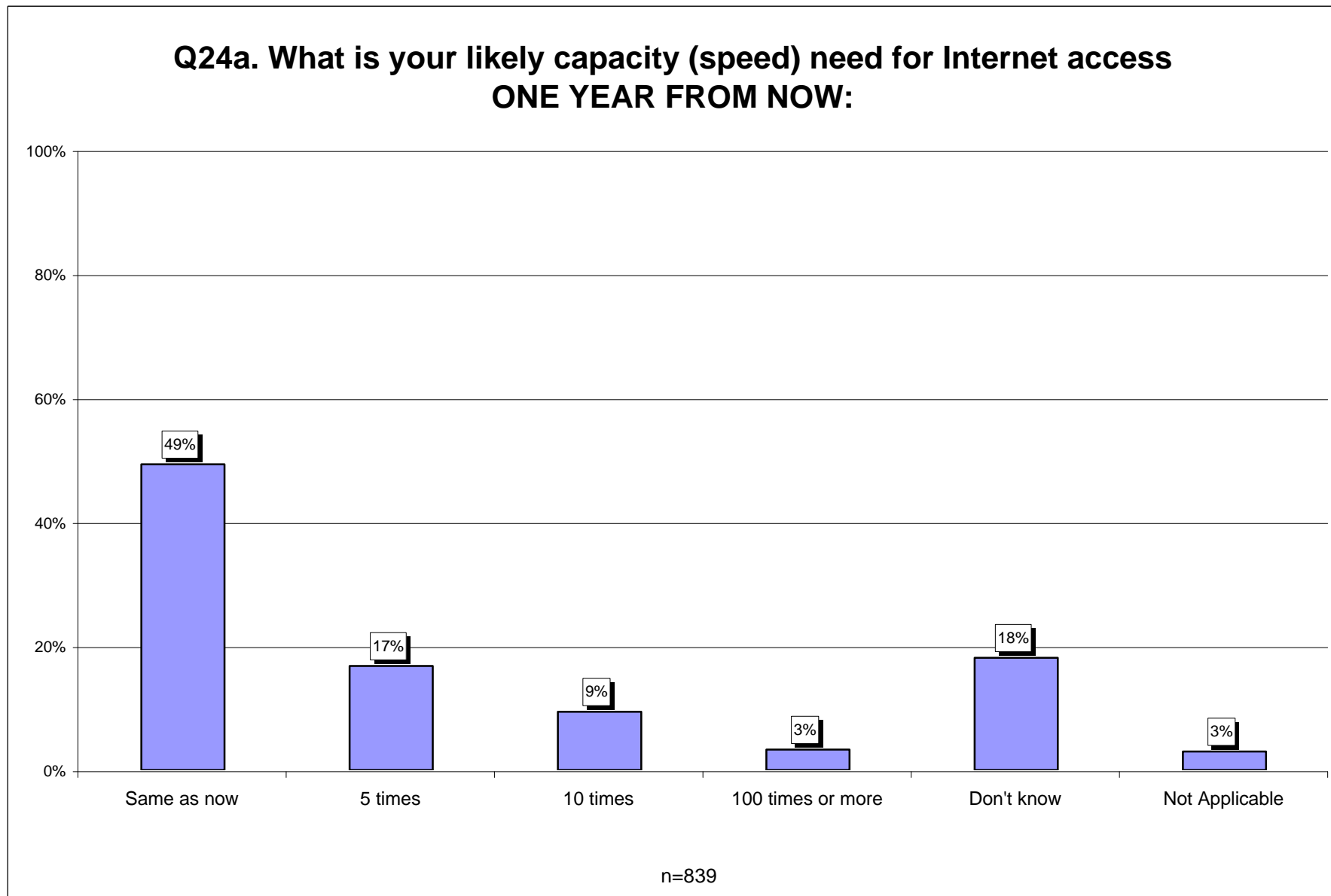


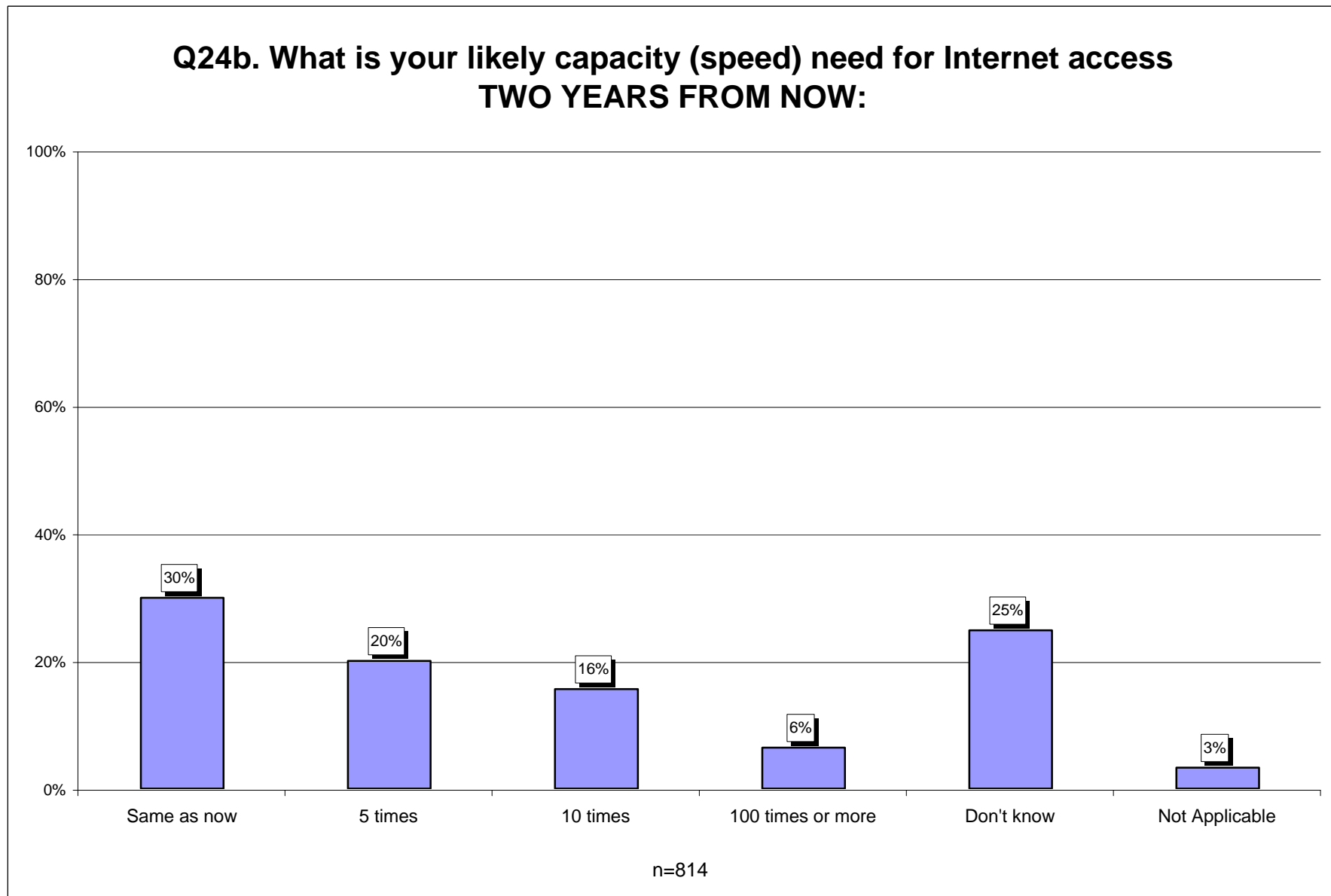
* Top two box = percent somewhat willing + percent very willing

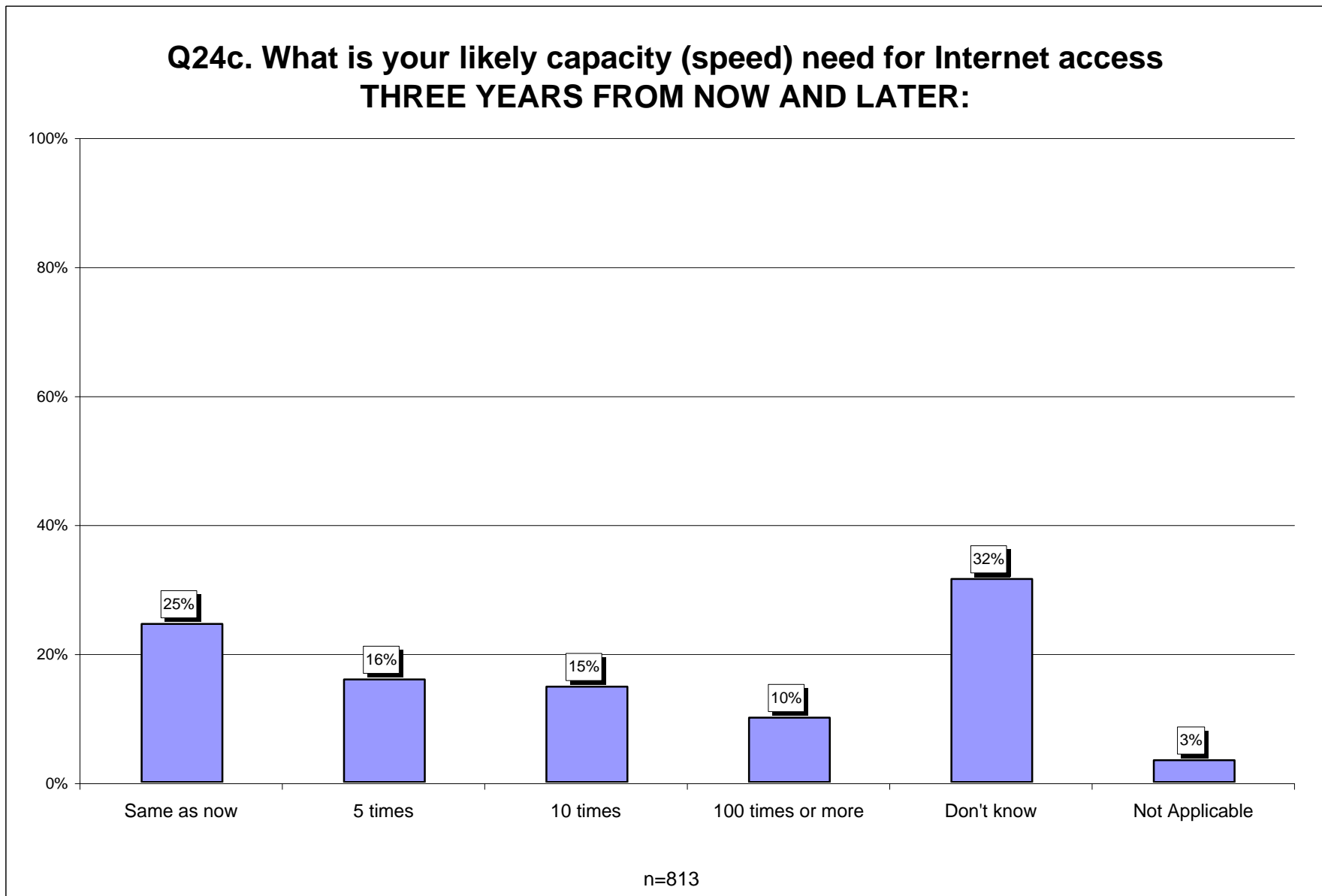
Q22-23 Definitions	
Upstream	Data transfer from your location to the Internet
Downstream	Data transfer from the Internet to your location
1,544 Kpbs	1,544,000 bits per second (Example: would take approximately 1.5 minutes to transfer an average drawing (CAD) file of 15,000 Kbytes)
256 Kpbs	256,000 bits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



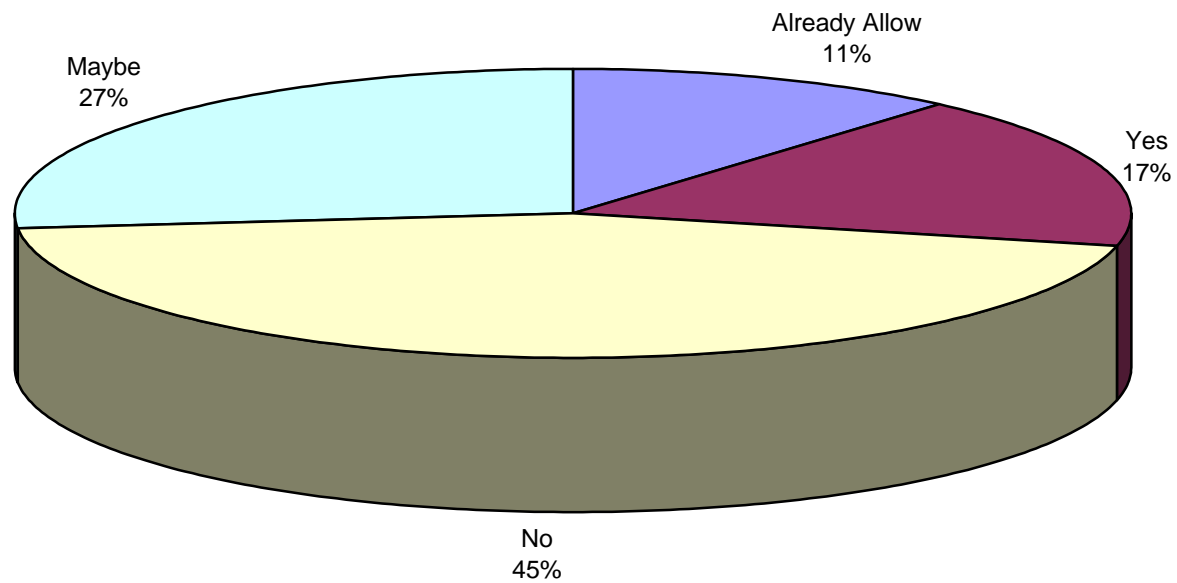




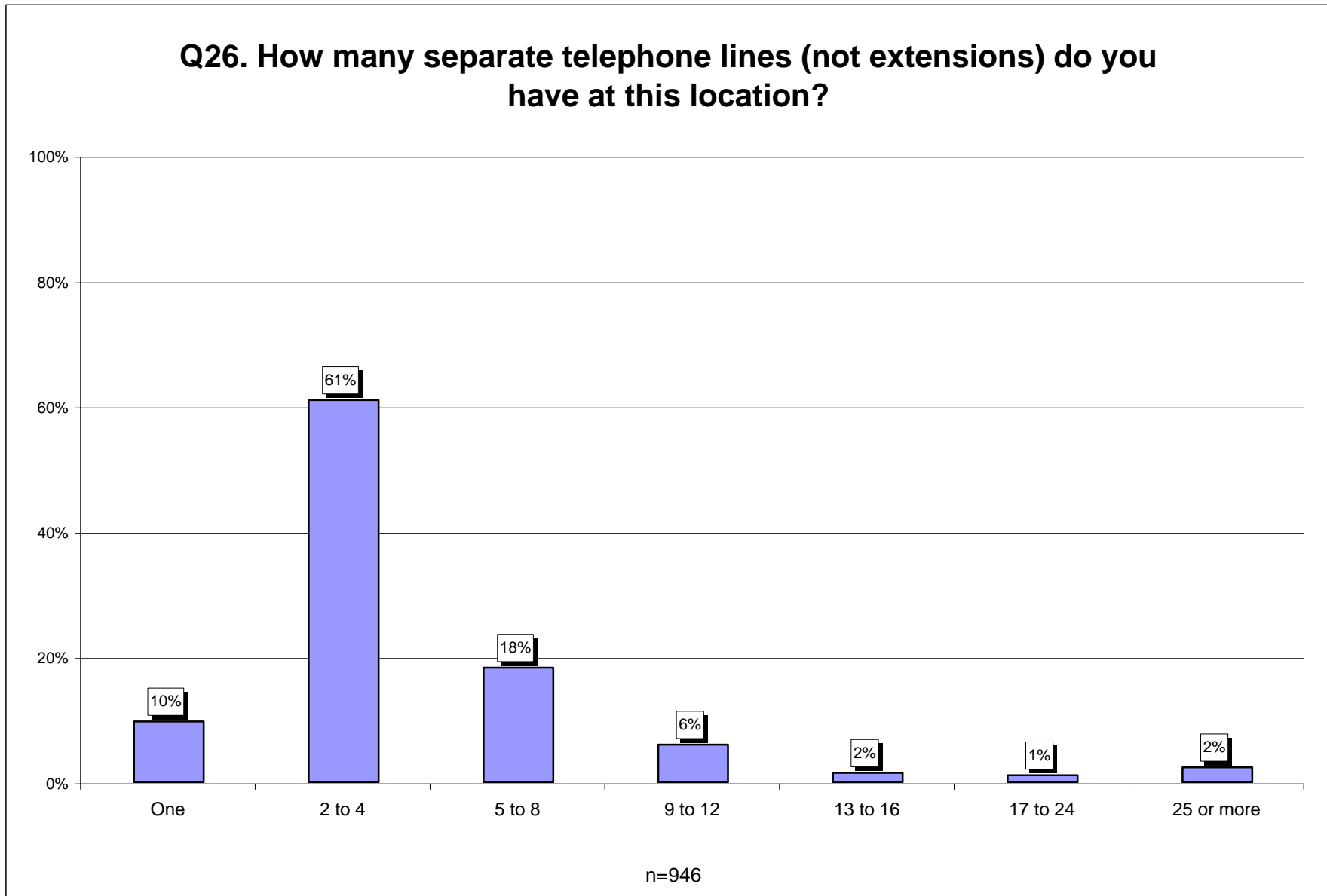




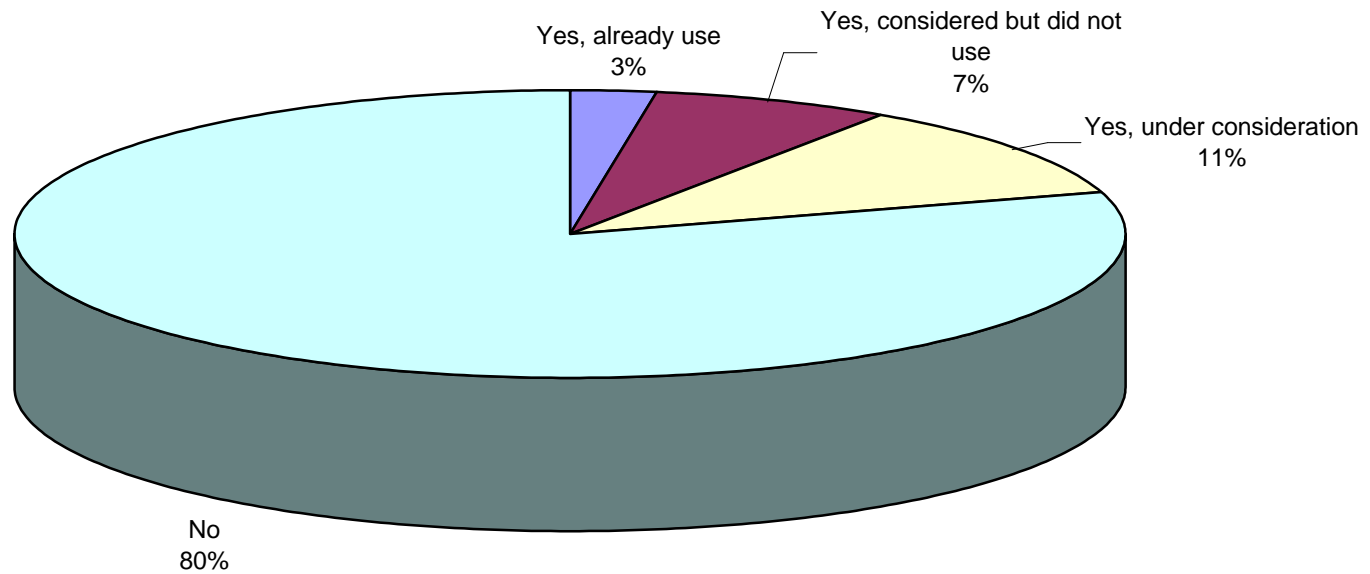
Q25. If high-speed connections were available to employees from home, would your organization allow telecommuting?



n=847

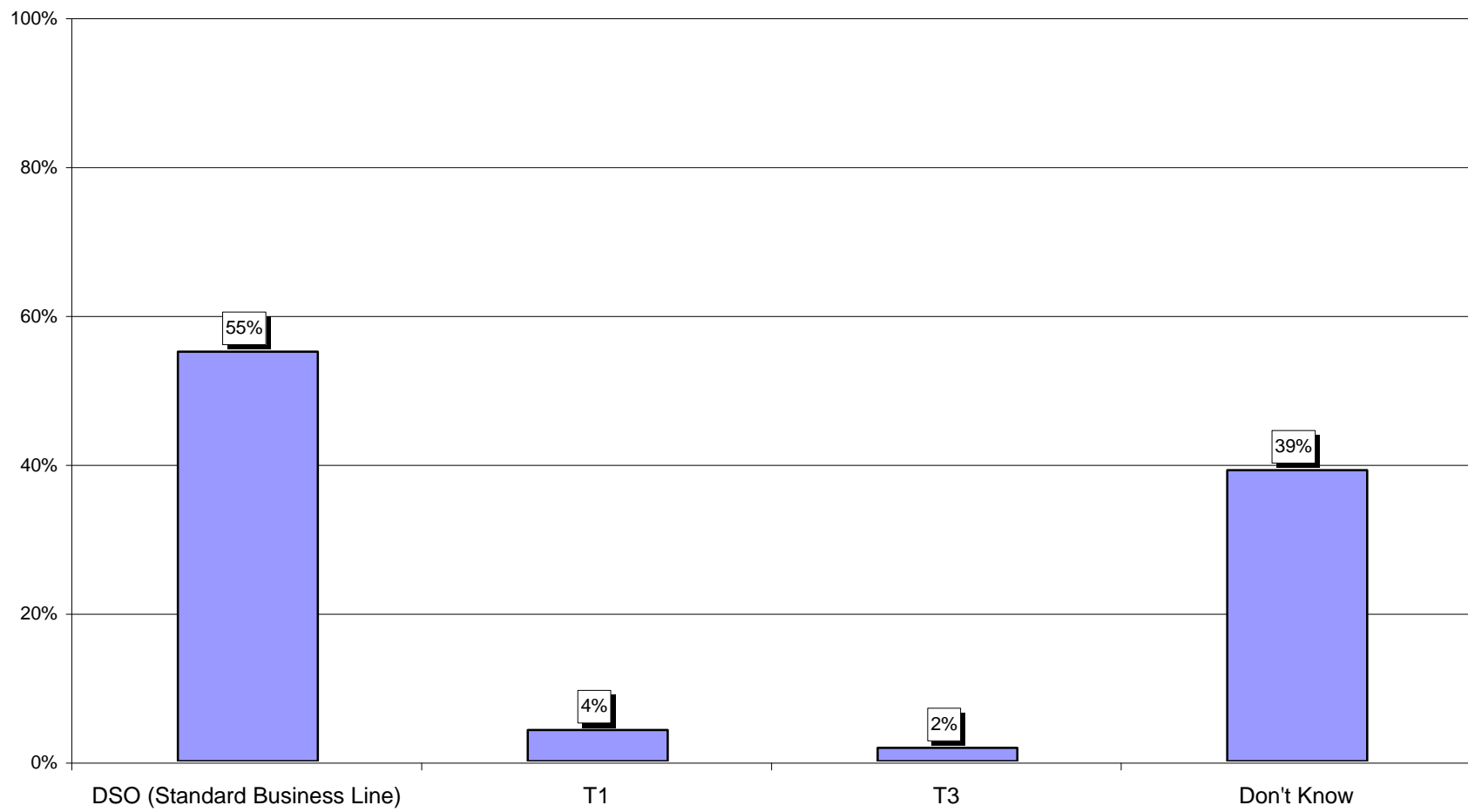


Q27. Have you considered using a VoIP (Voice over Internet Protocol) telephone service?

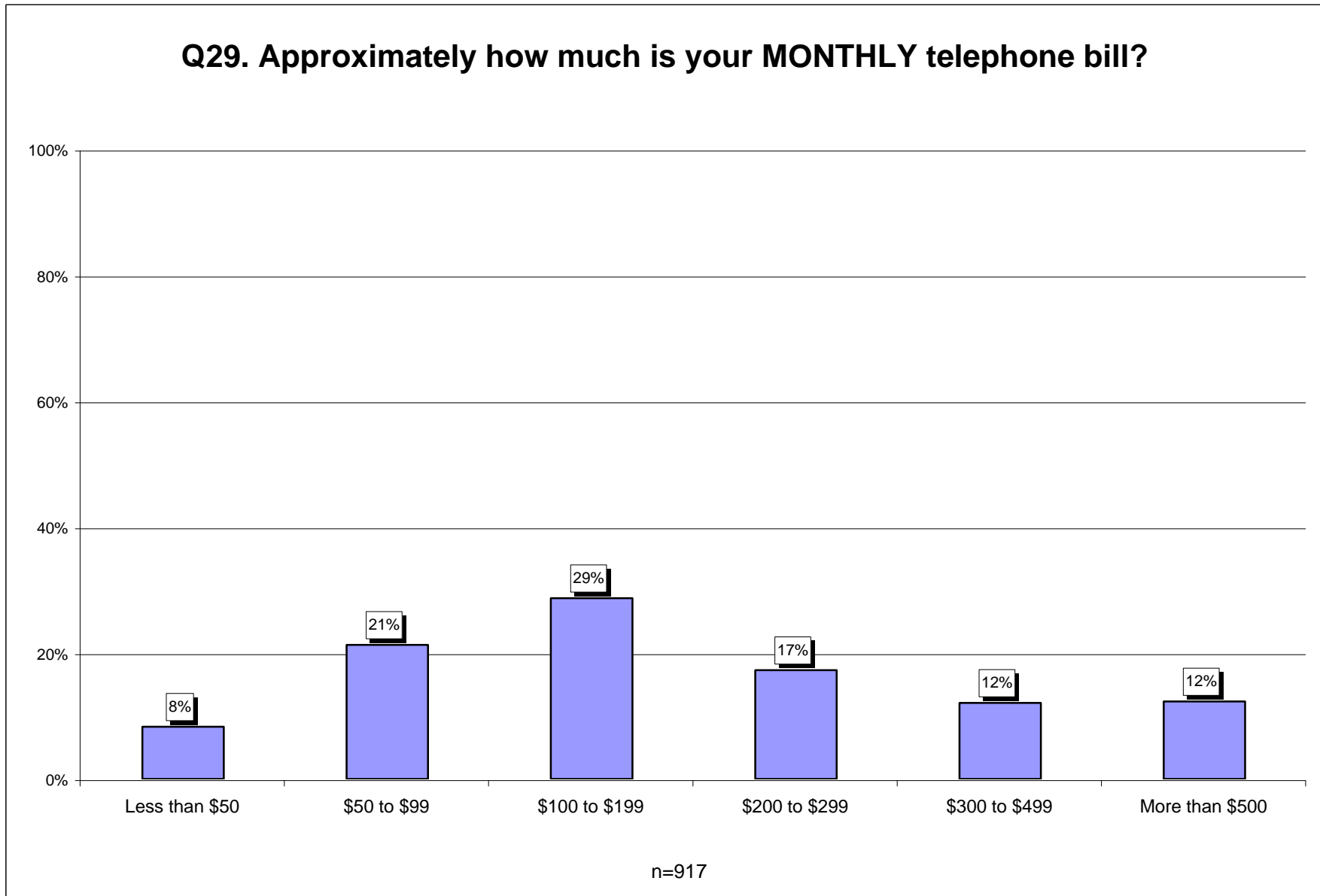


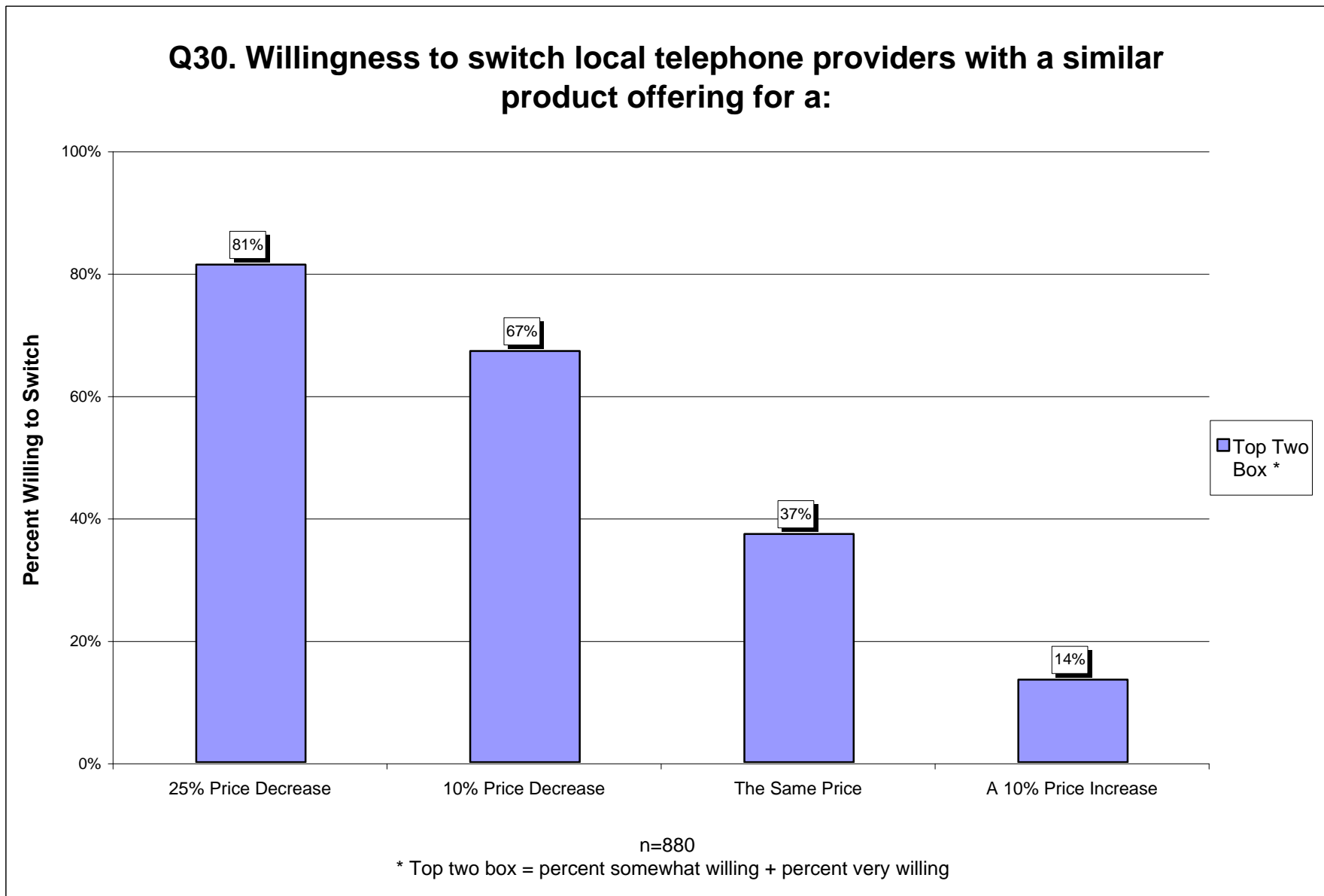
n=921

Q28. Indicate the main type of telephone line/trunk used at this location:

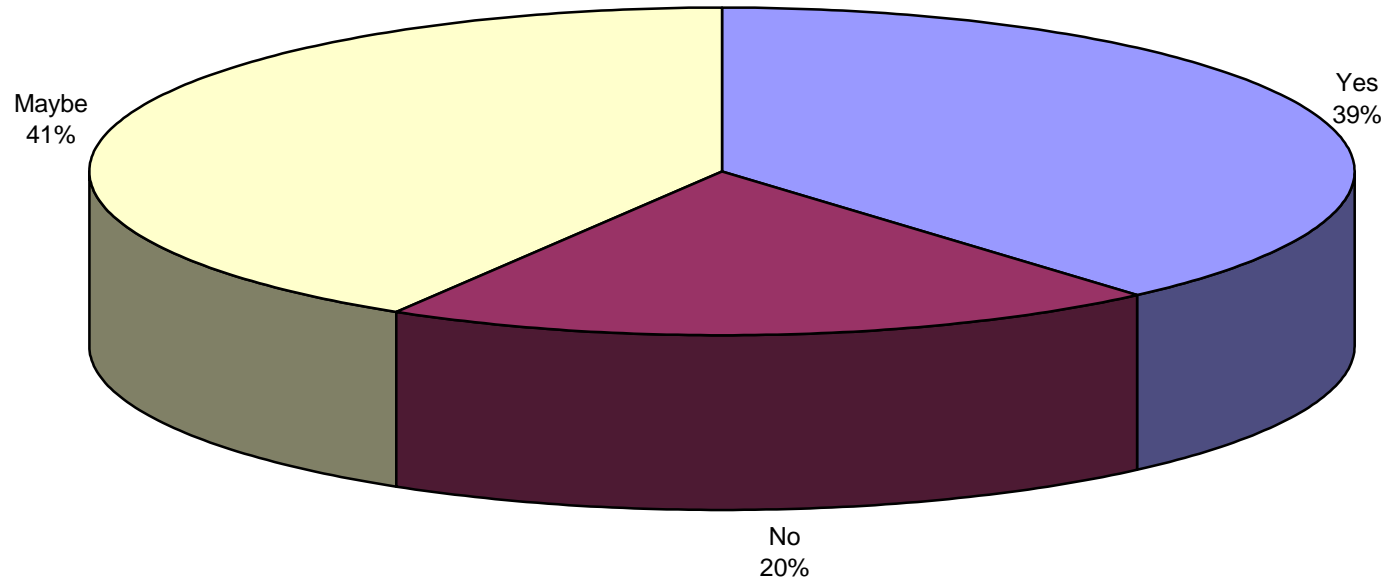


n=913



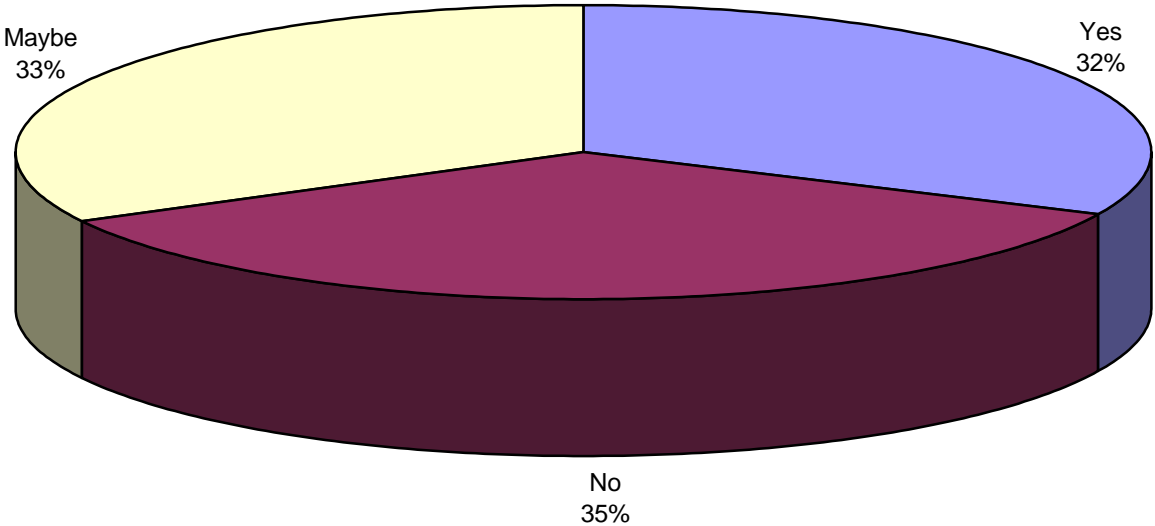


Q31. Are you interested in a fiber optic interconnection within your community?



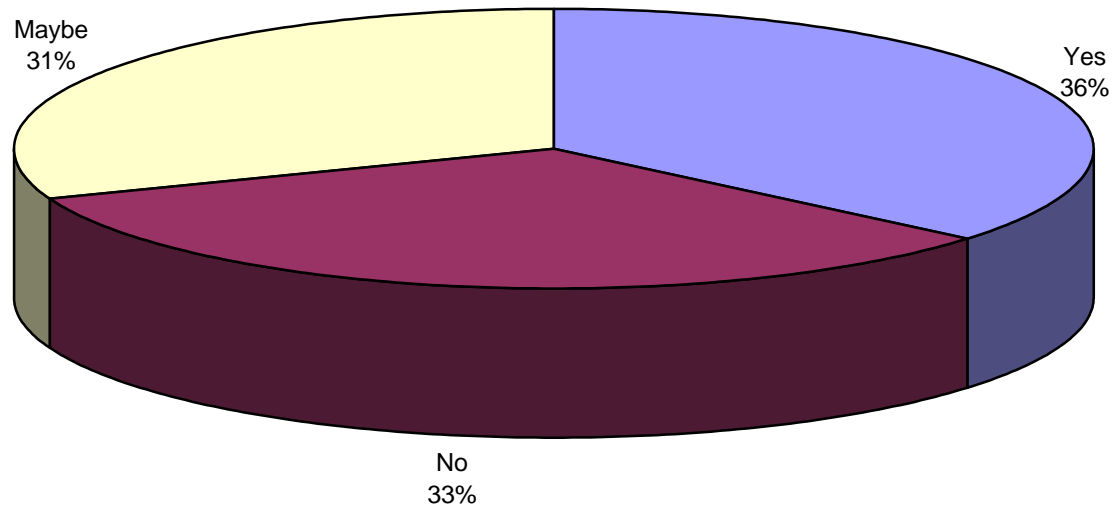
n=922

Q32. Are you interested in a fiber optic interconnection with other communities in your county?

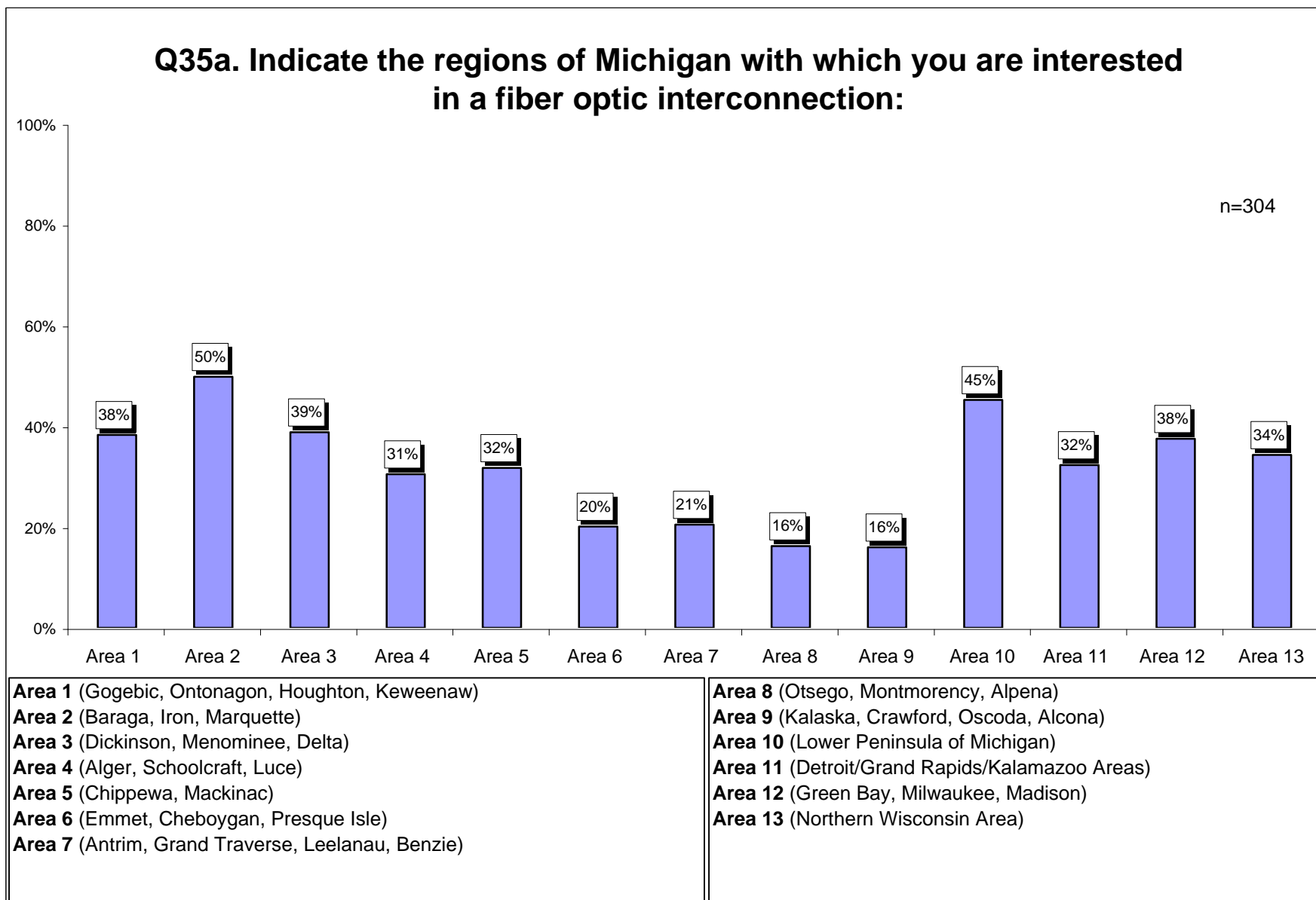


n=923

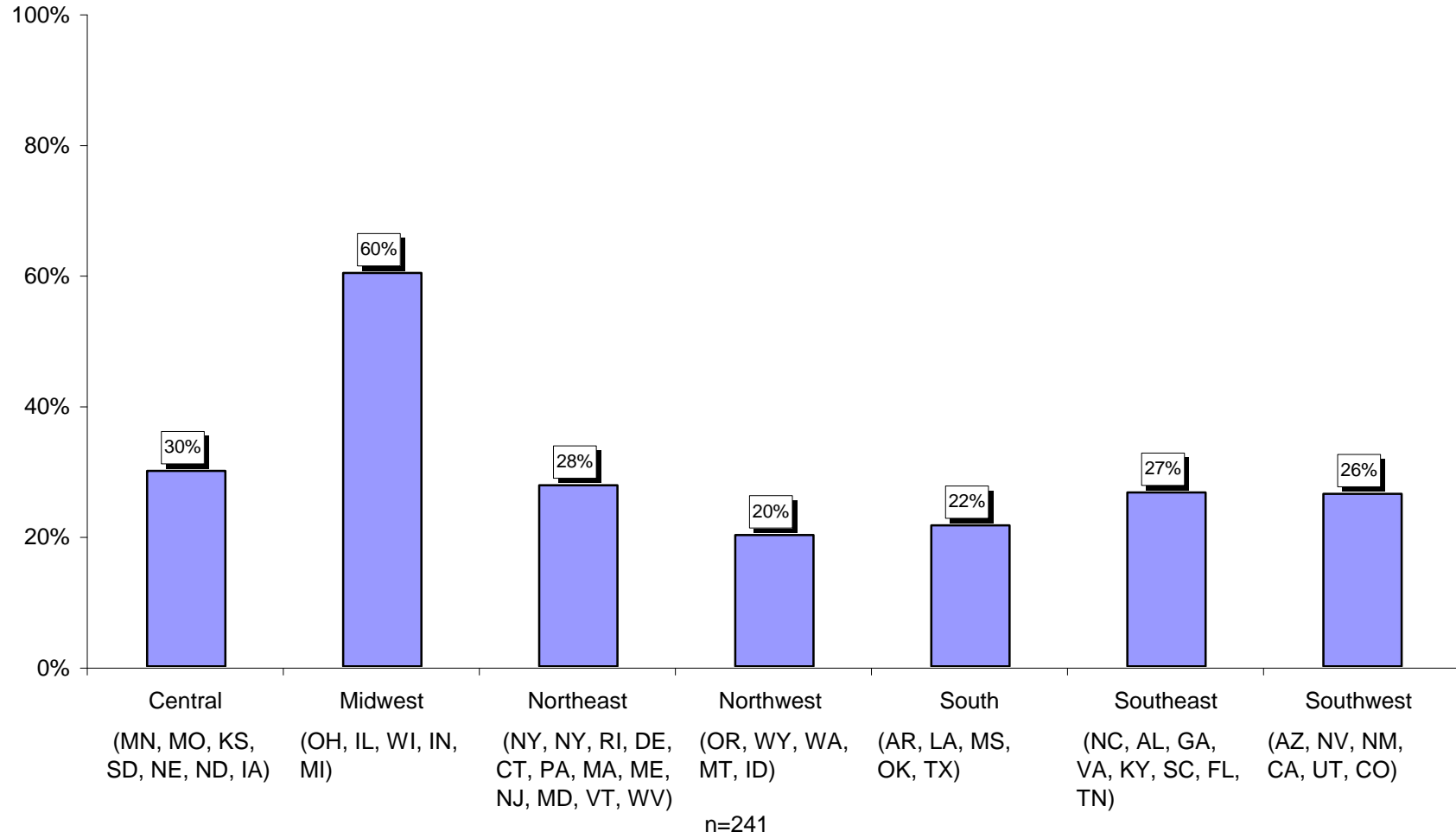
Q34. Are you interested in a fiber optic interconnection with other communities outside of UP Counties?



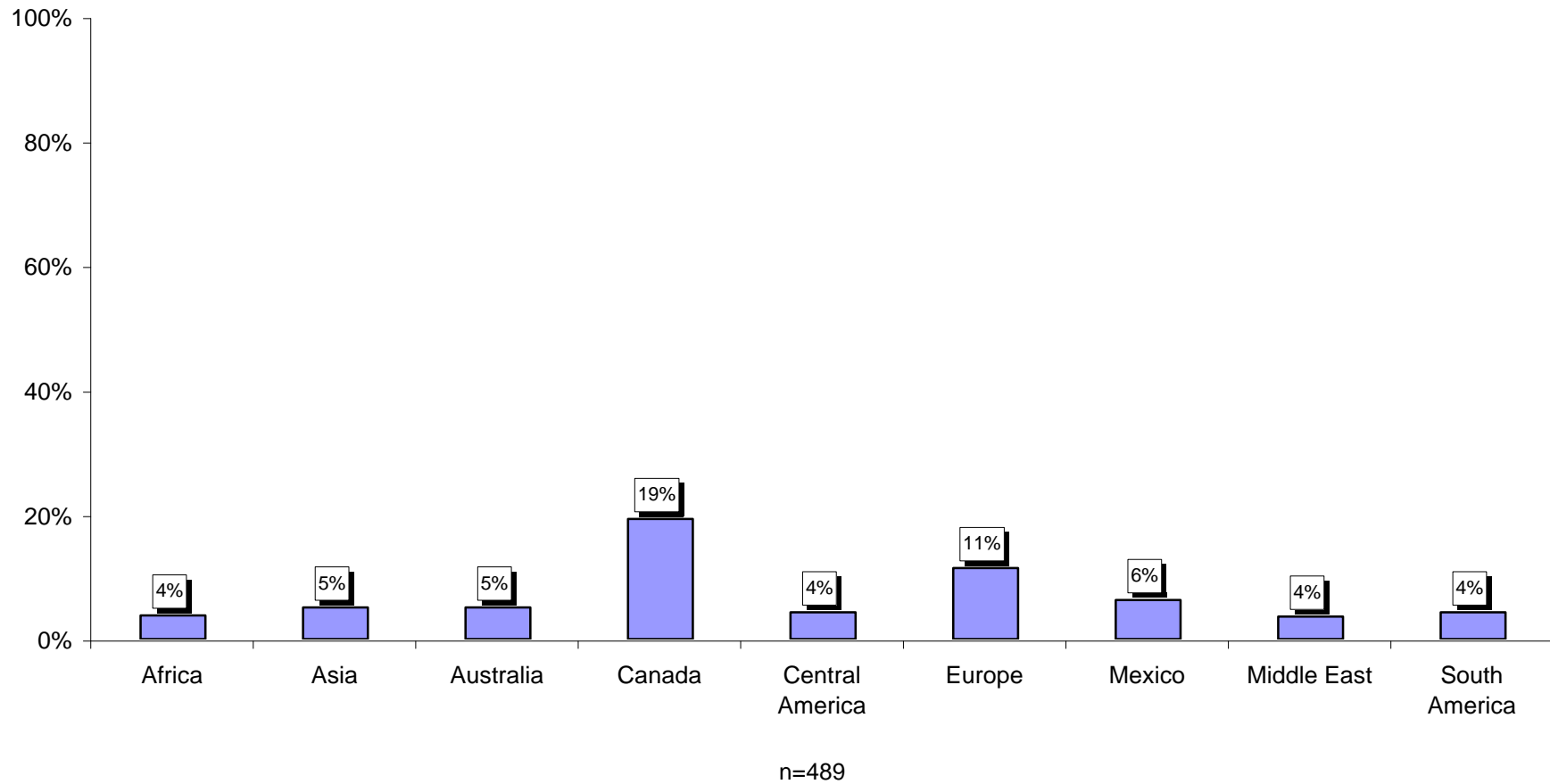
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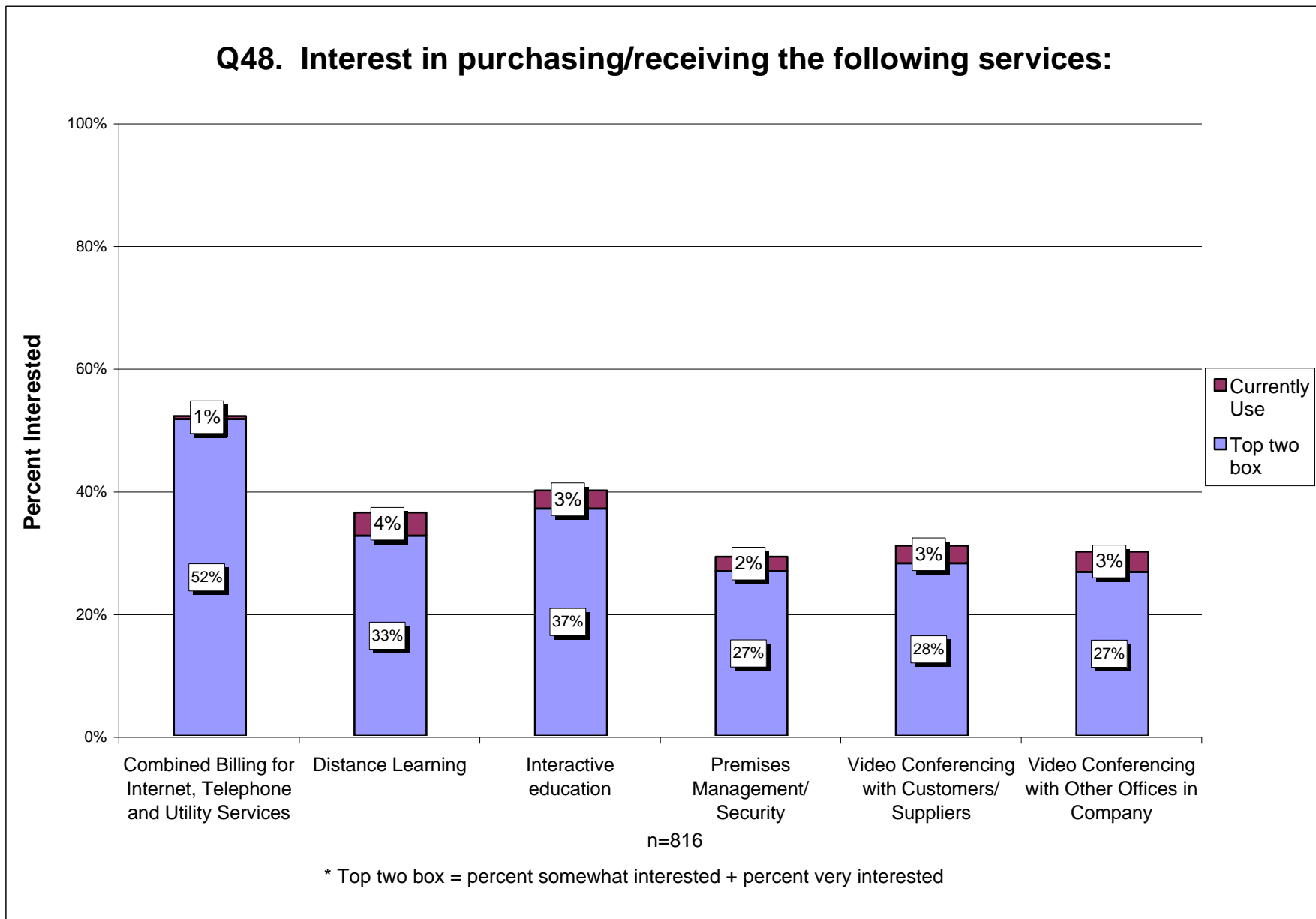


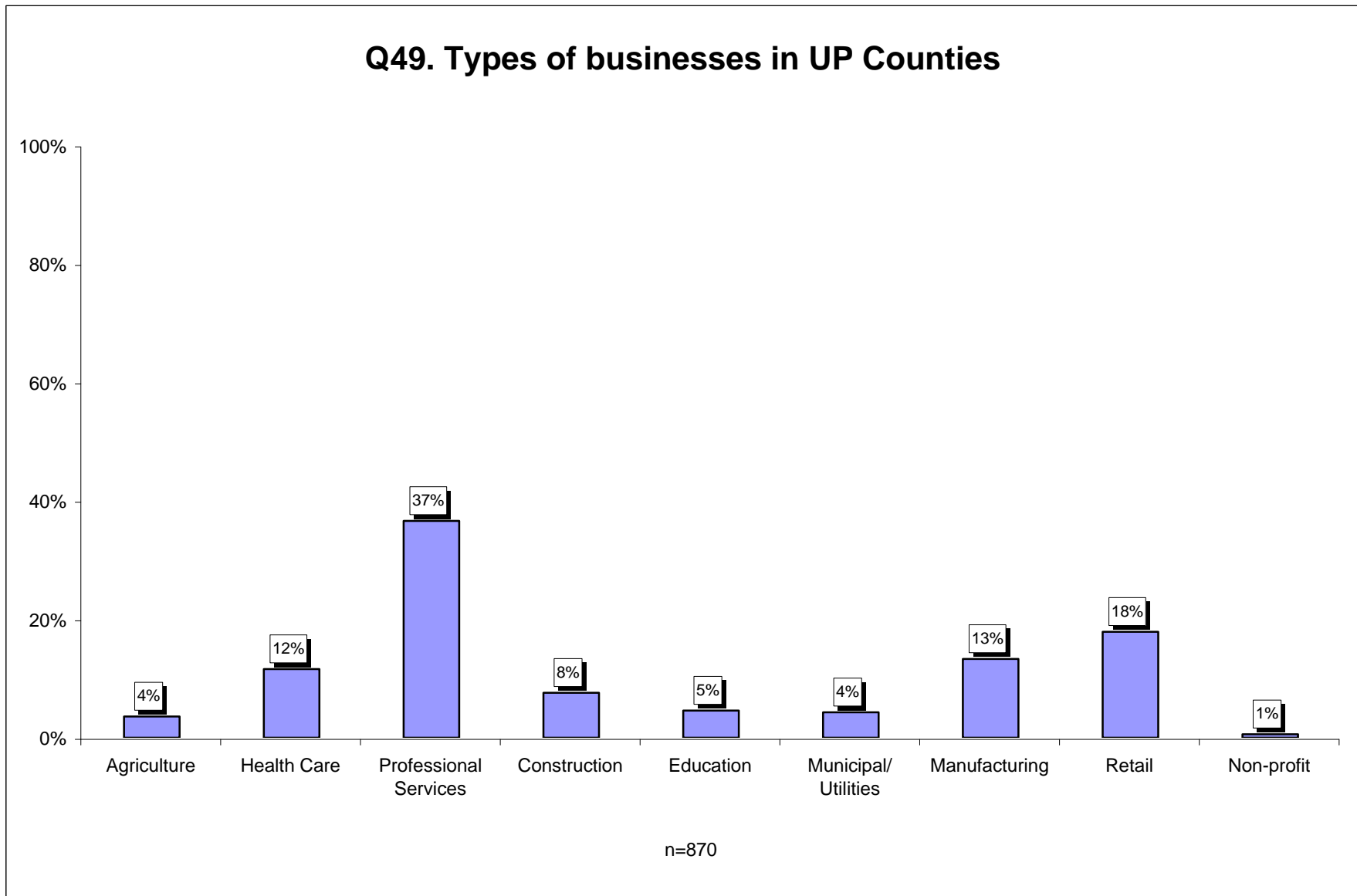
Q35b. Indicate the regions in the United States with which you are interested in a fiber optic interconnection:



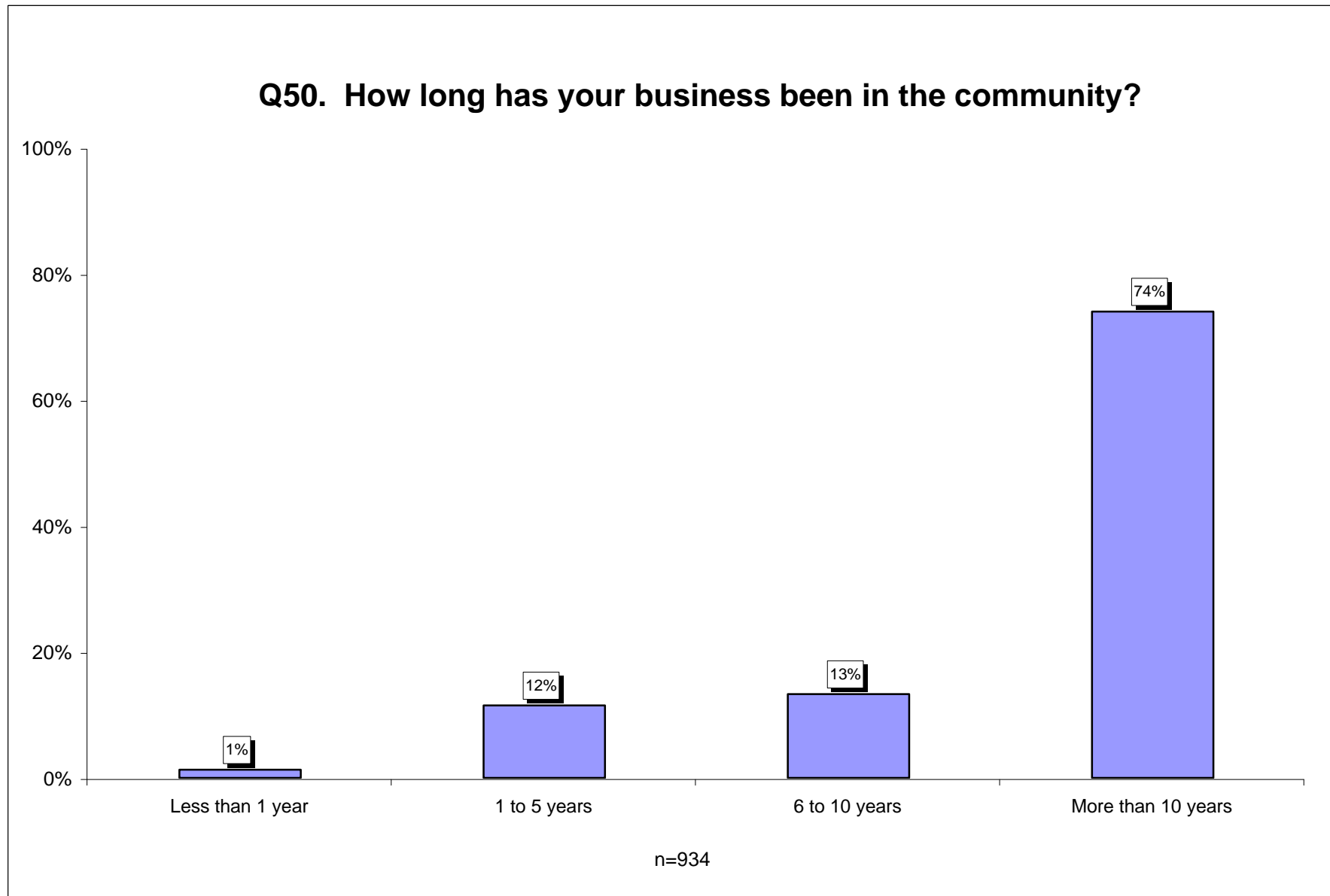
Q35c. Indicate the International Regions with which you are interested in a fiber optic interconnection:

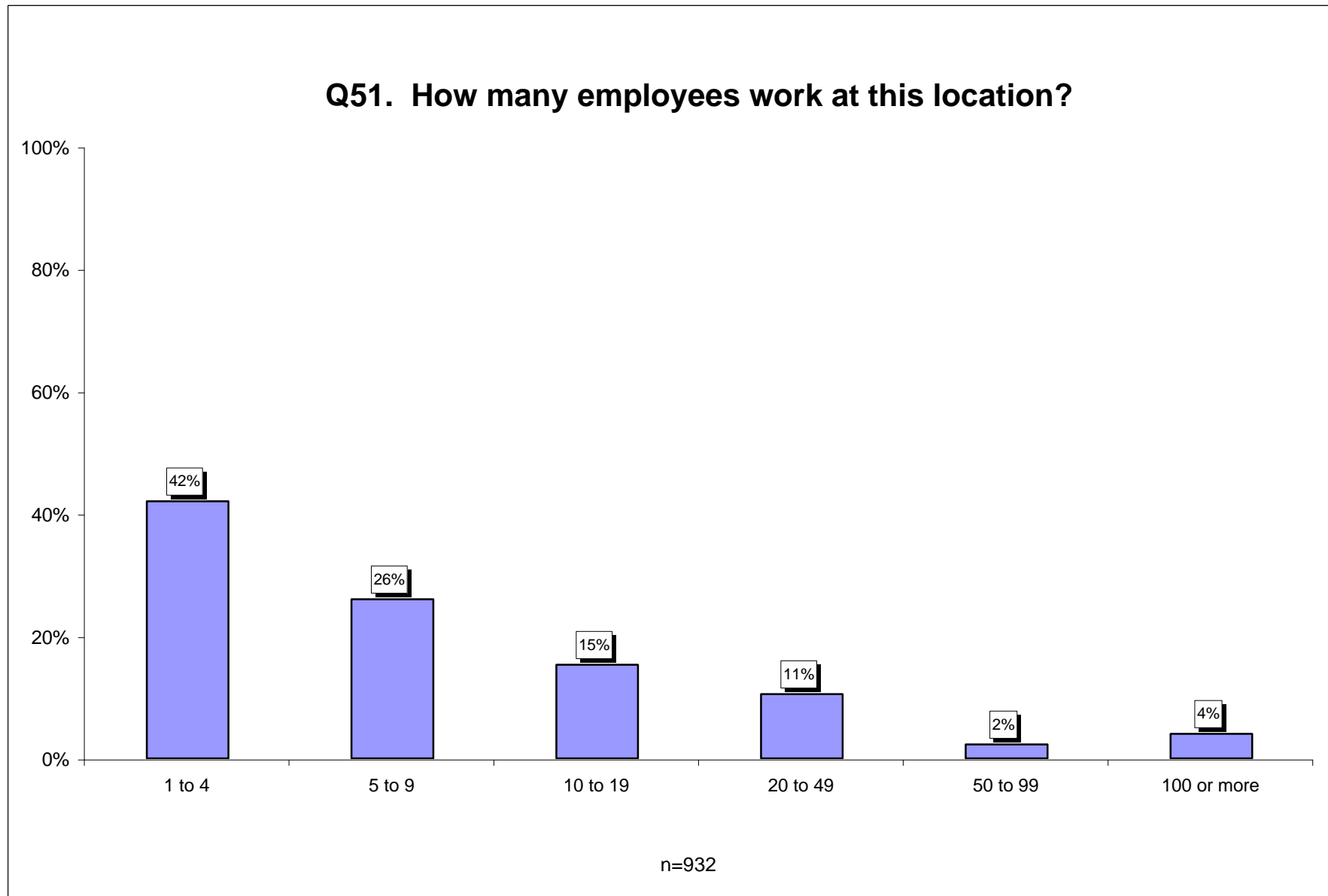




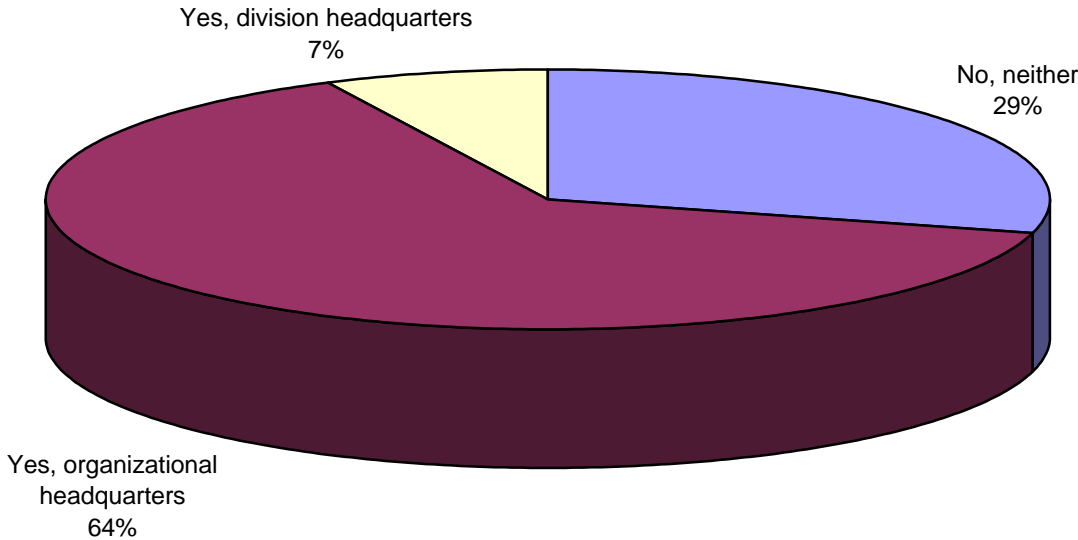


Business Type Breakdown	
Agriculture	Agriculture, forestry, fishing, hunting or mining
Health Care	Health care and social services
Professional Services	Arts, entertainment, recreation, accommodations and food service Finance, insurance, real estate, rental or leasing Information Professional, scientific,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



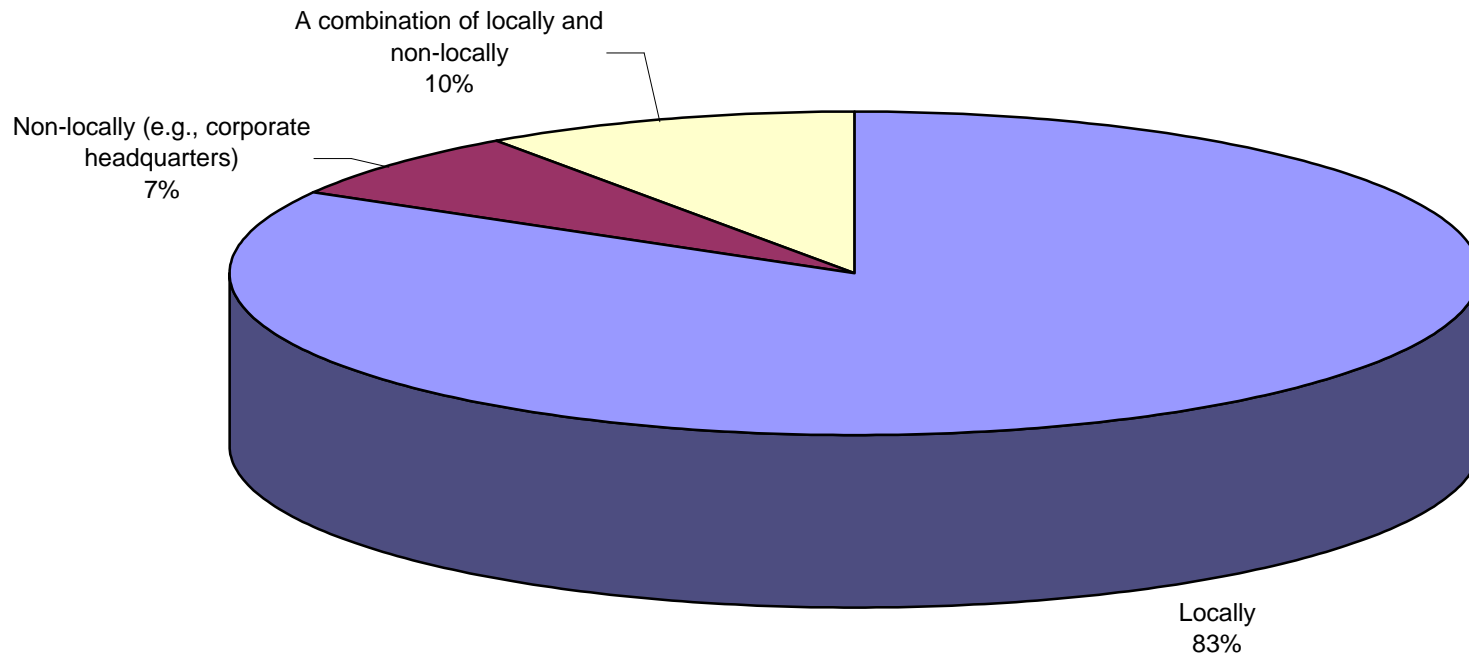


Q52. Is this the organization's headquarters or division headquarters?



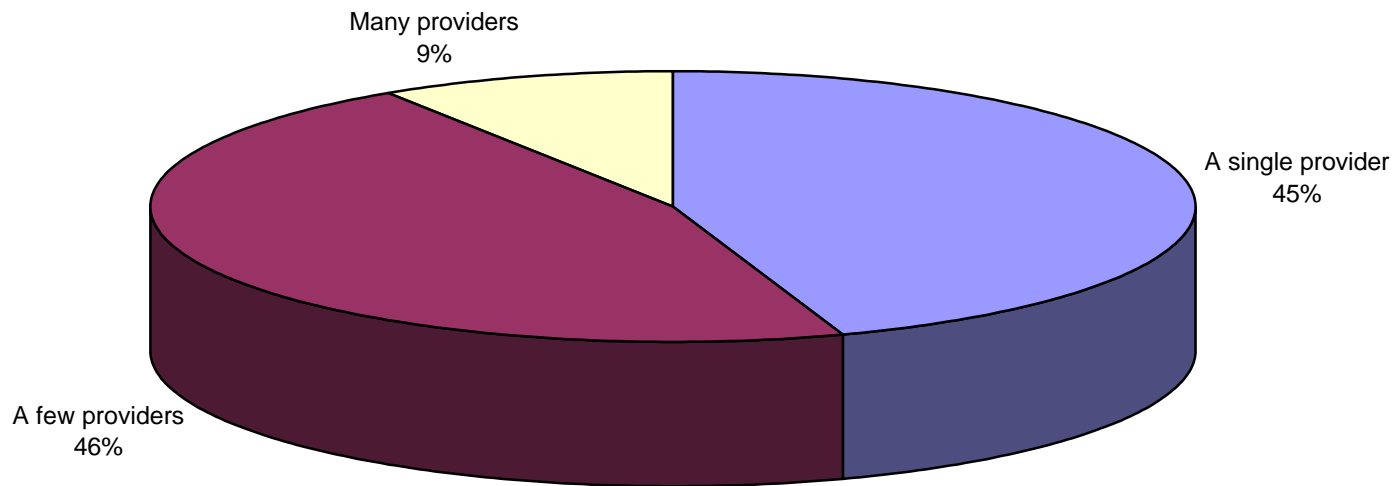
n=890

Q53. Where are telecommunication decisions made in this organization?

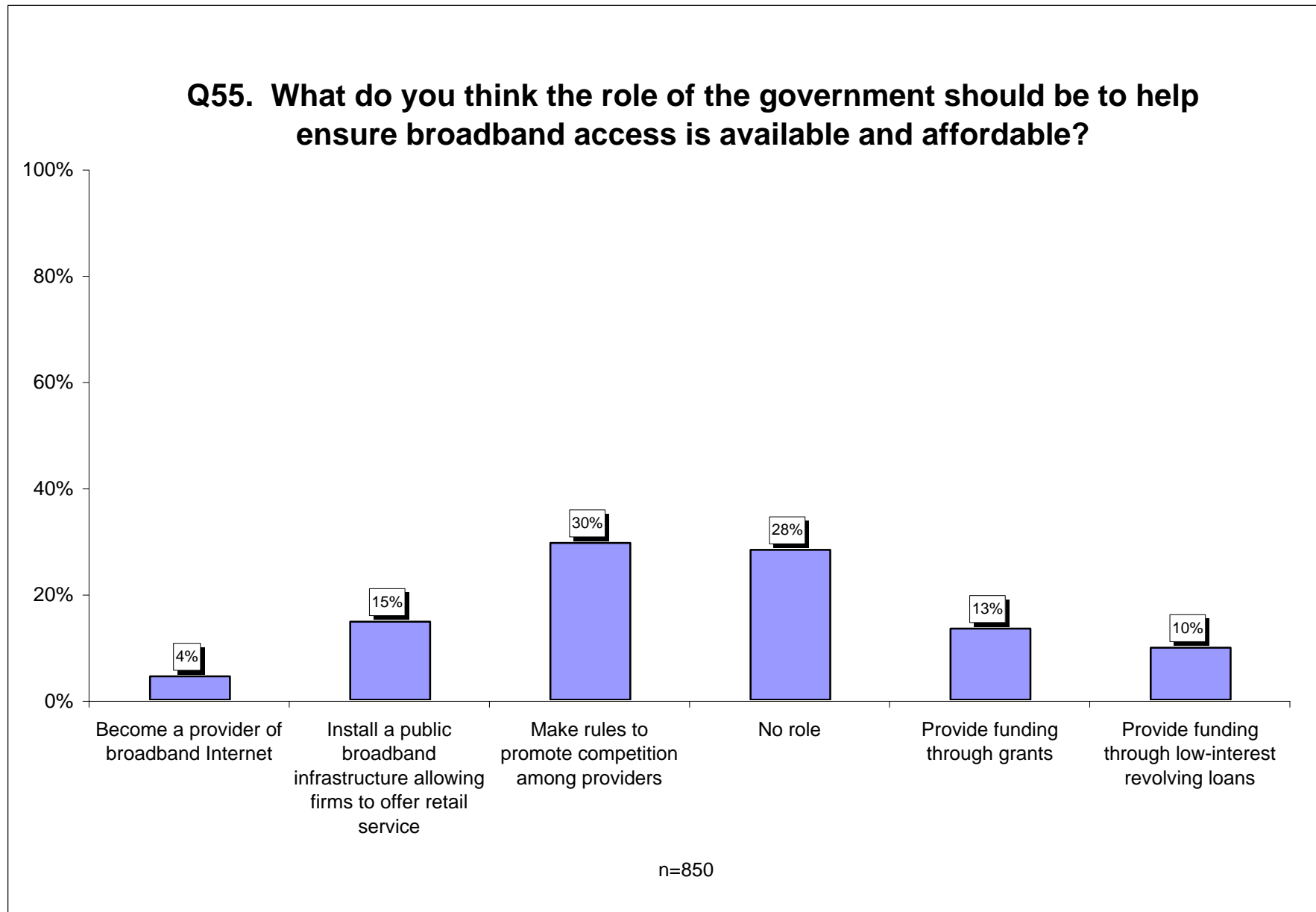


n=912

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



n=889



Upper Peninsula Aggregate

Business Survey Summary

Section 3:

Business Survey Cross Tabulations

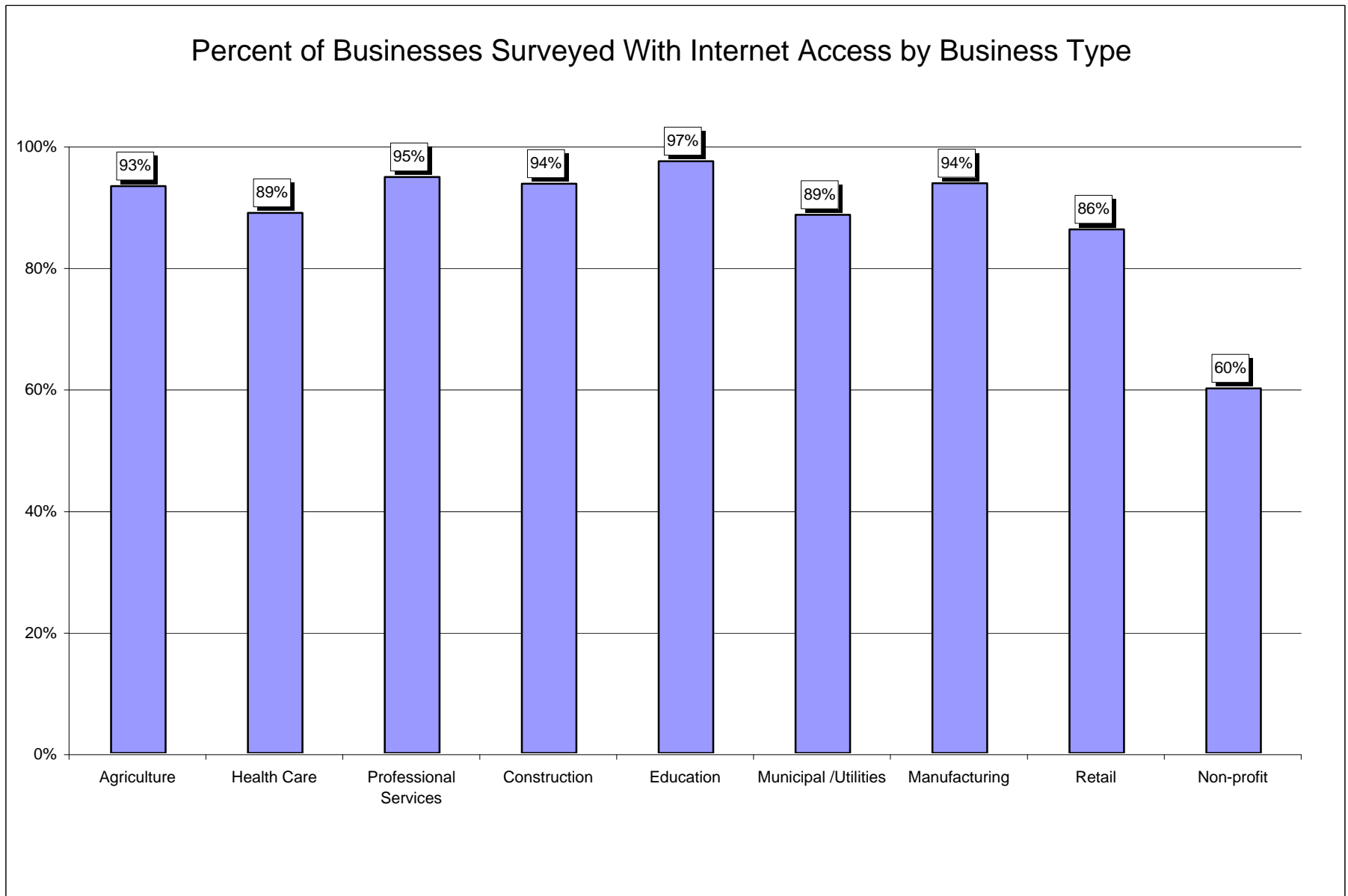
Upper Peninsula Aggregate

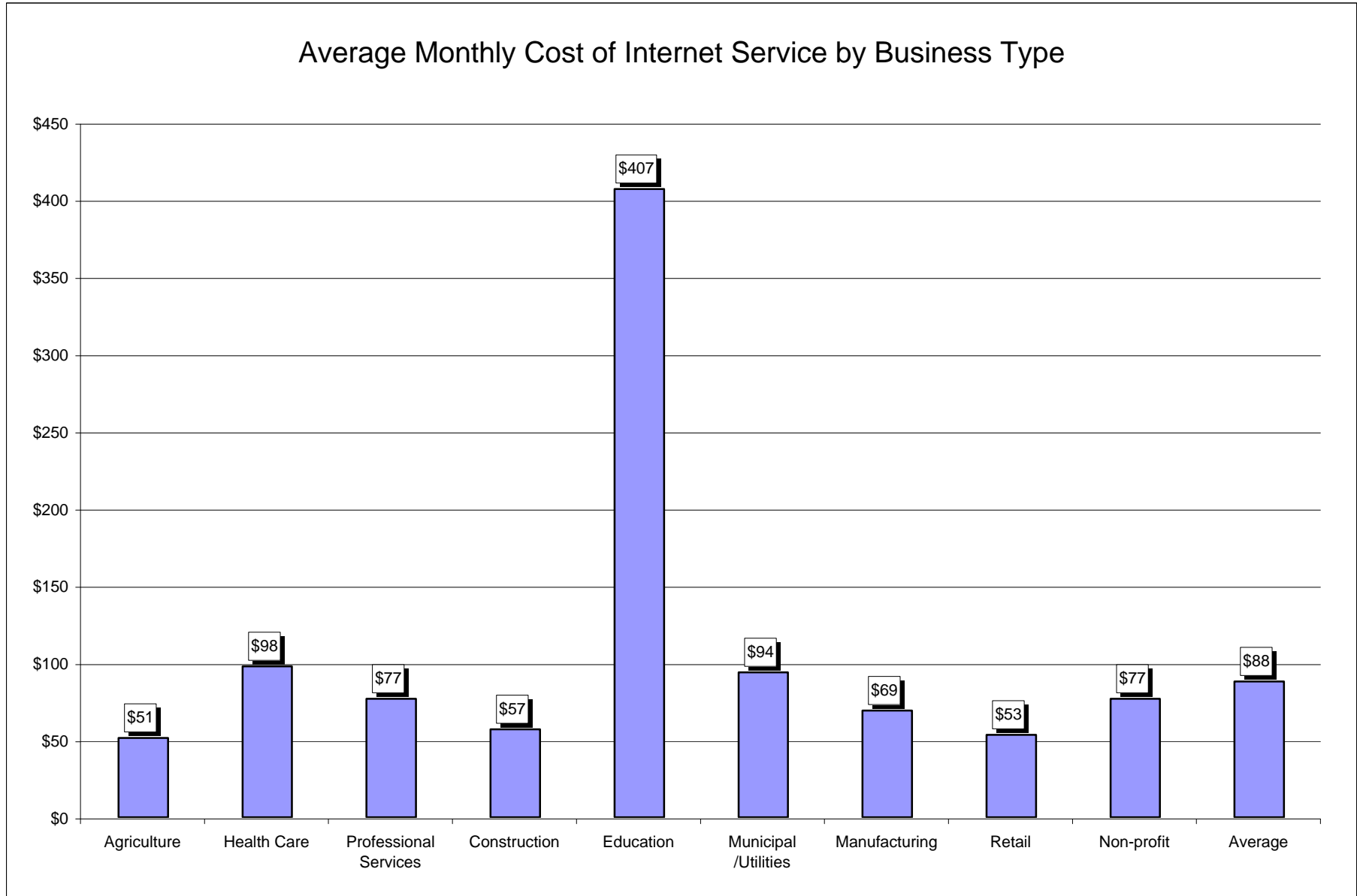
Business Survey

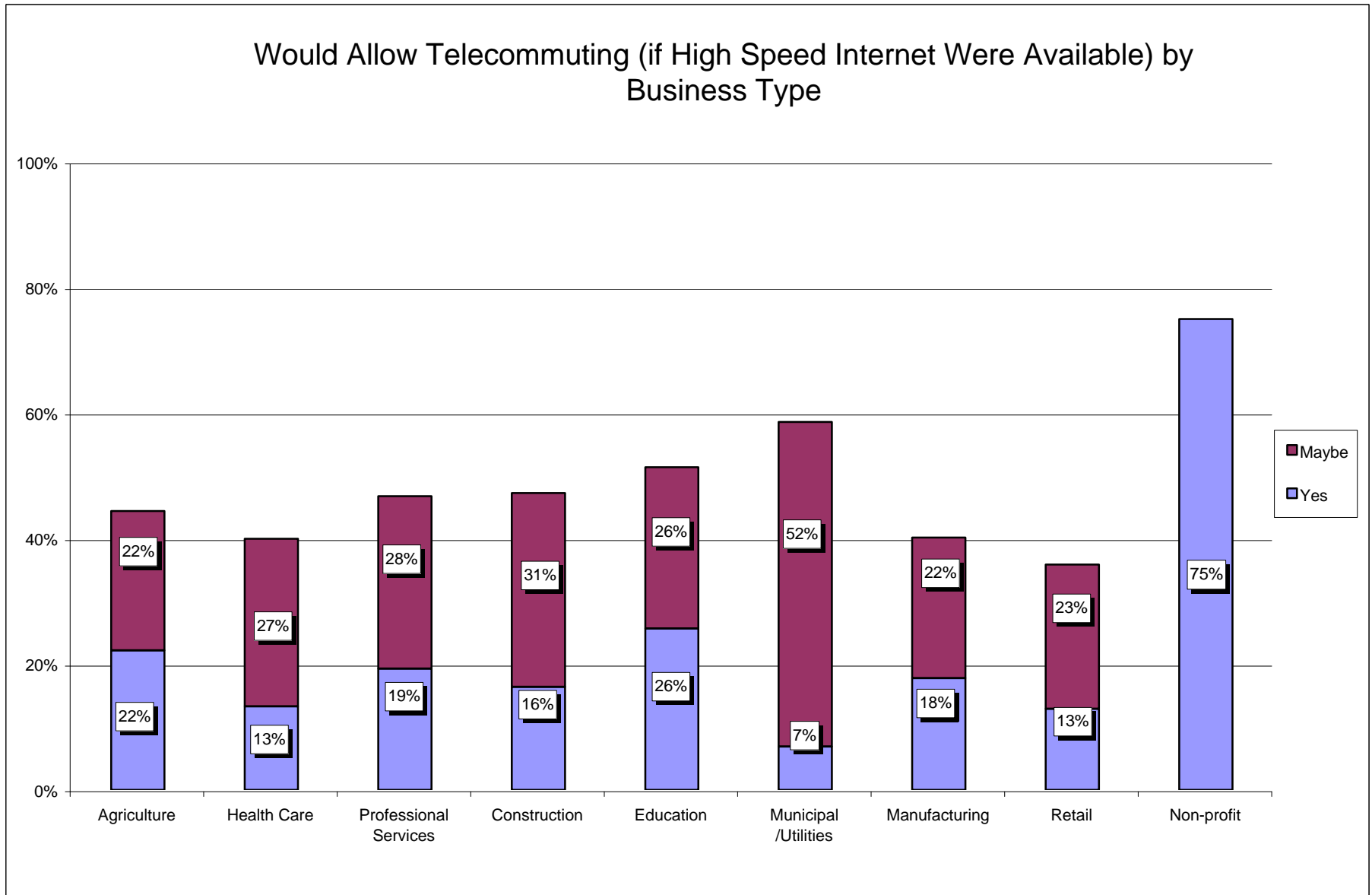
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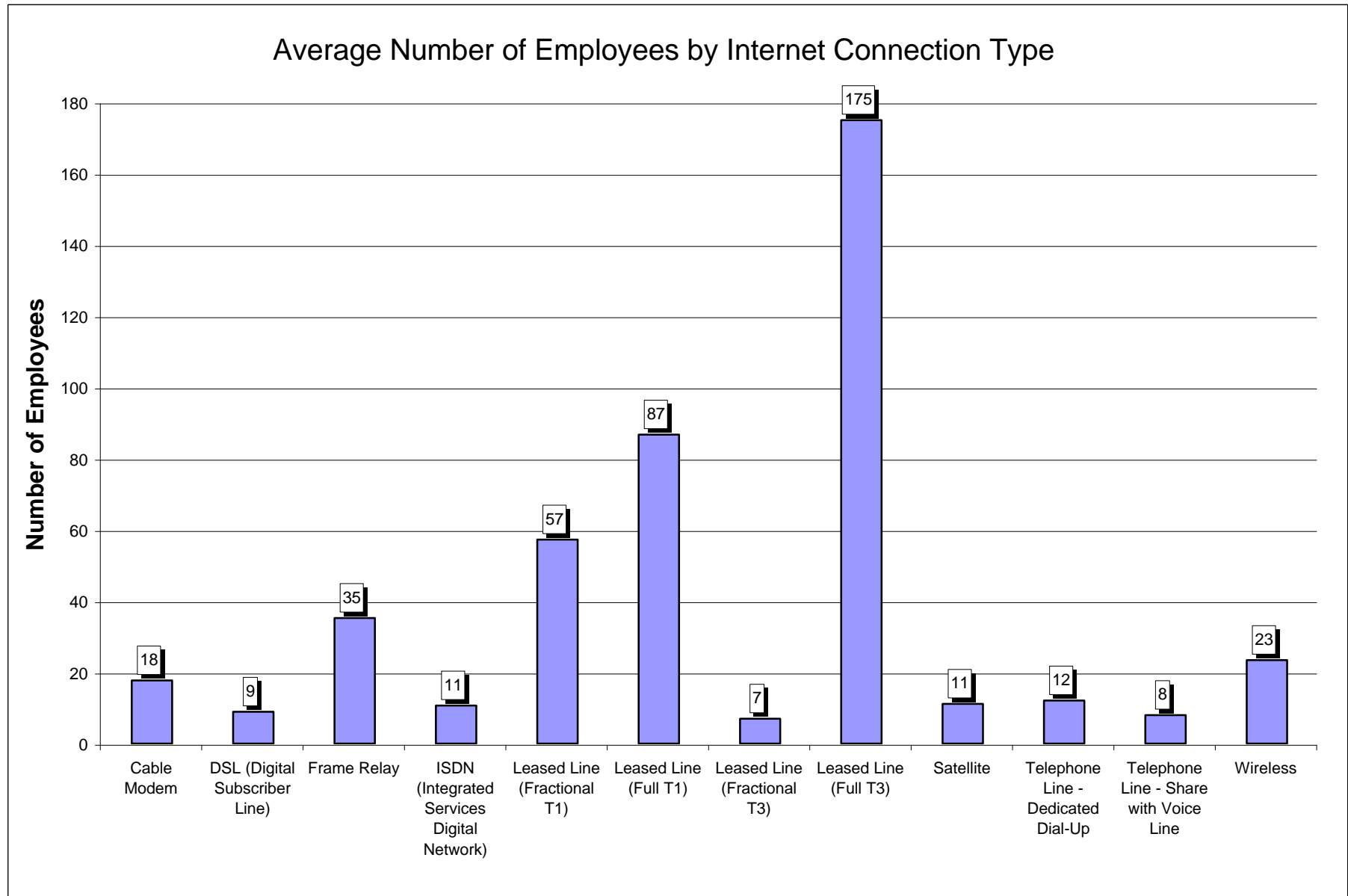
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Website Host Location By Business Type										
	Agriculture	Health Care	Professional Services	Construction	Education	Municipal /Utilities	Manufacturing	Retail	Non-profit	Average
At this facility	25%	40%	26%	24%	53%	29%	13%	24%	67%	27%
At another facility in the county	0%	17%	19%	28%	9%	18%	20%	14%	0%	18%
At another facility in Michigan	25%	13%	20%	14%	25%	29%	25%	16%	33%	20%
At another facility outside of	33%	23%	24%	17%	13%	12%	34%	26%	0%	24%
Don't know	17%	6%	12%	17%	0%	12%	8%	20%	0%	11%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

