



# South Carolina's Broadband Landscape

presented by

**Connect South Carolina**

to the

**South Carolina Public Service Commission**

**December 2, 2010**

**Corey Johns**  
**Stakeholder Relations Manager**  
**Connect South Carolina**

**Raquel Noriega**  
**Director of Public Policy**  
**Connected Nation**



# Agenda Outline

- Overview of Connect South Carolina's Accomplishments to Date
- Demo of the Online Interactive Map - South Carolina BroadbandStat
- South Carolina's Statewide Broadband Inventory - 2010
- Broadband & Technology Adoption Across South Carolina - 2010
- Connect South Carolina's Next Steps & Important Future Dates
- Q & A



# Progress to Date

## Connect South Carolina has:

- Built South Carolina's first interactive statewide broadband inventory (beta)
- Integrated multiple data layers into the BroadbandStat interactive mapping tool:
  - High-speed internet availability layer by platform type
  - Unserved household density layer
  - Community Anchor Institution layer
- Updated static and interactive maps available at: [www.connectsc.org](http://www.connectsc.org)
- Verified data for nineteen (19) eligible South Carolina providers (39.6%)
- Generated over 76 million positive media impressions for the initiative
- Studied the Adoption Gap in South Carolina:
  - Produced Residential Technology Assessment: Complete results available at: [www.connectsc.org](http://www.connectsc.org)
  - Conducted Business Technology Assessment (coming soon)



# South Carolina BroadbandStat

## Online Interactive Map

[www.connectsc.org](http://www.connectsc.org)

# South Carolina's Statewide Broadband Inventory - 2010



## Broadband Inventory in South Carolina By Speed Tier - Fixed Platforms

Download Speed Tier	Unserved Households ('000s)	Served Households ('000s)	Percent Households Served
At Least 768 Kbps	81	1,452	94.70%
At Least 1.5 Mbps	82	1,451	94.66%
At Least 3 Mbps	95	1,438	93.80%
At Least 6 Mbps	169	1,364	88.96%
At Least 10 Mbps	299	1,235	80.54%
At Least 25 Mbps	1,324	210	13.70%
At Least 50 Mbps	1,324	209	13.66%
At Least 100 Mbps	1,534	-	0%
At Least 1 Gbps	1,534	-	0%

Source: Connect South Carolina, October 2010.



## Broadband Inventory by Platform (At Least 768 Kbps Download Speeds)

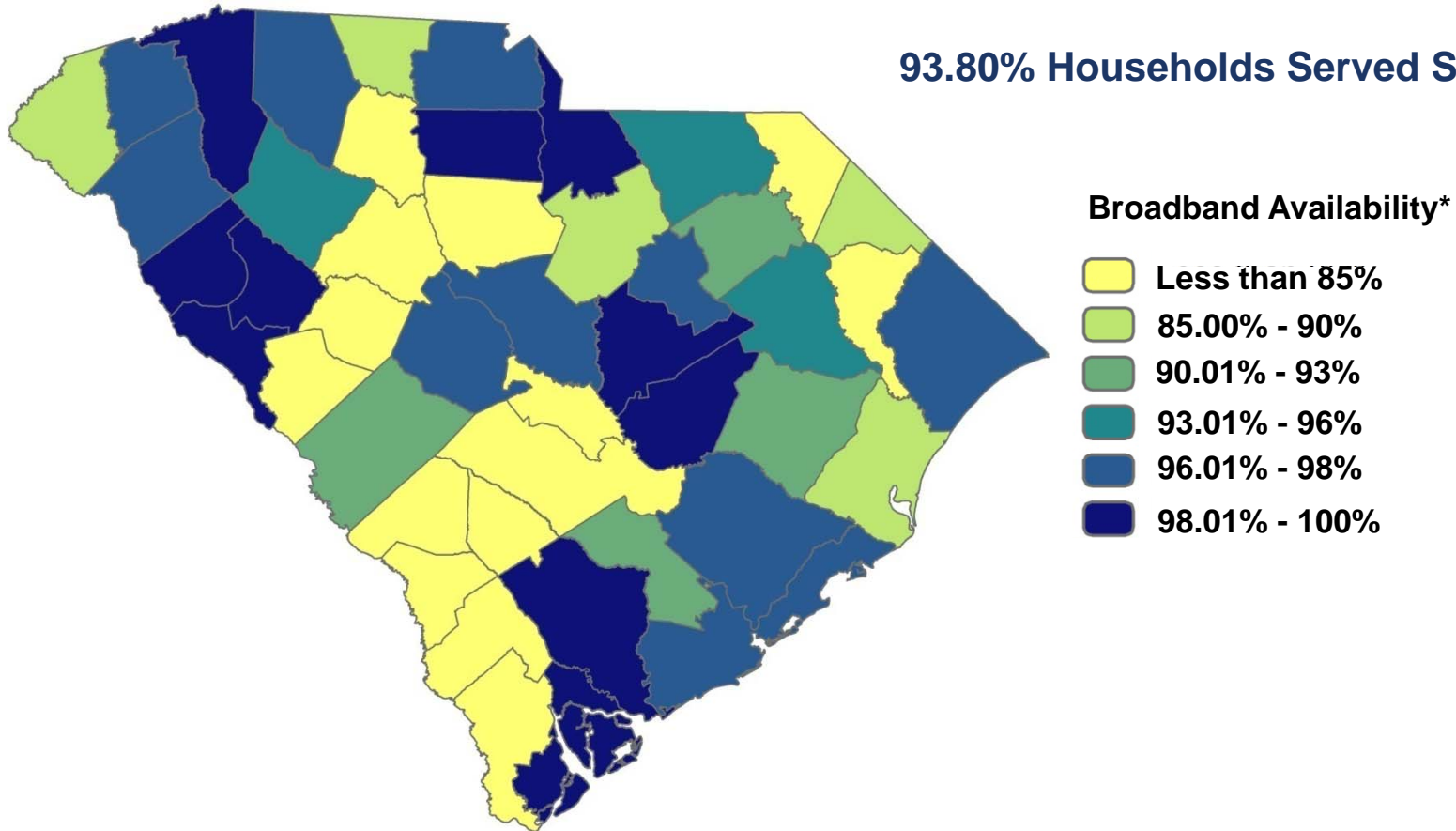
Platform	Served Households ('000s)	Percent Households Served	Number of Providers
Cable	1,213	79.08%	21
DSL	1,355	88.34%	27
Fiber	21	1.37%	12
Fixed Wireless	97	6.34%	6
Mobile	1,516	98.81%	9
All Platform Except Mobile	1,453	94.70%	66

Source: Connect South Carolina, October 2010.

## Broadband Availability

### 3 Mbps Download Speeds

**93.80% Households Served Statewide**



\*Percentage of households served by terrestrial, non-mobile service with speeds of at least 3 Mbps download and 200 Kbps upload

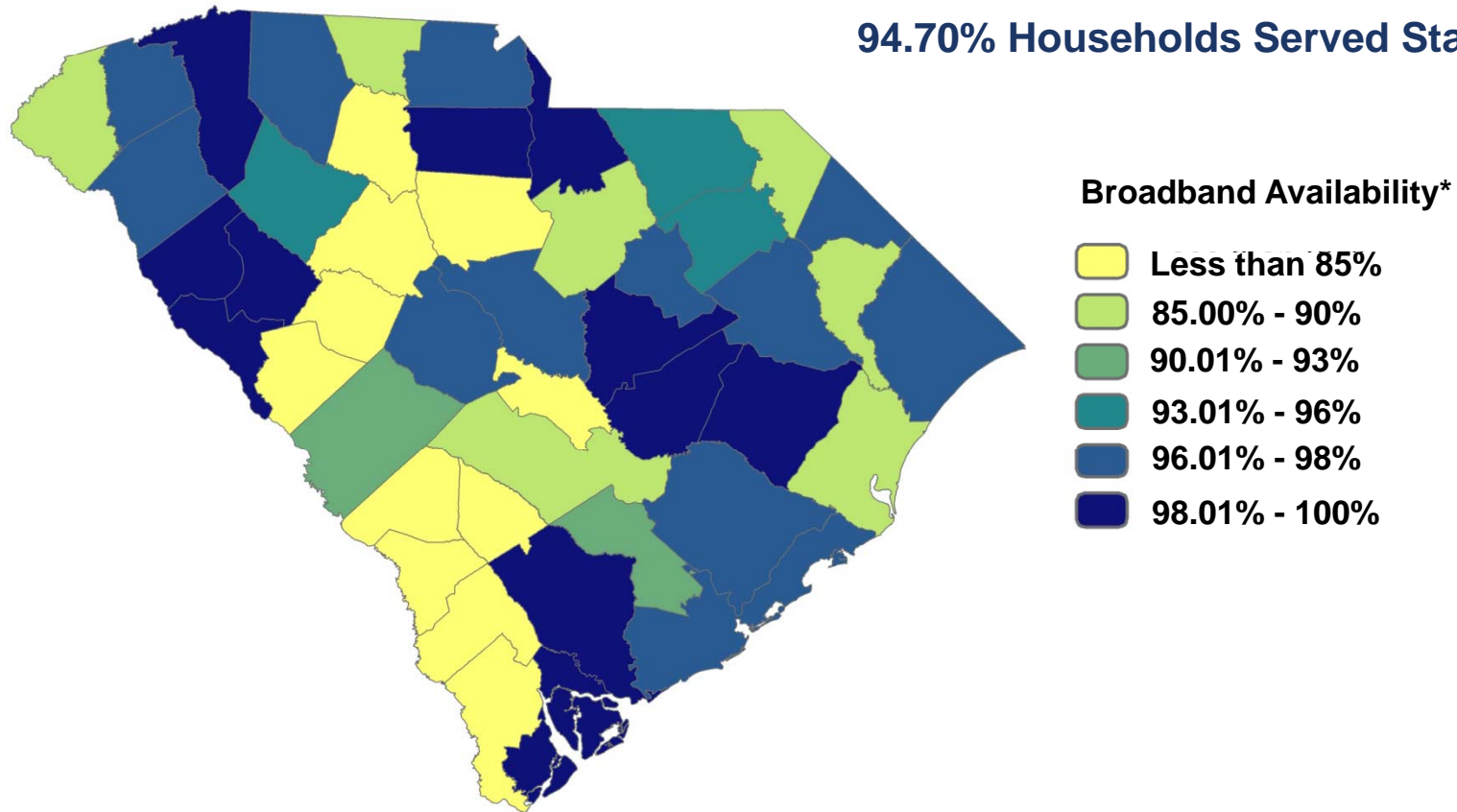
Source: Connect South Carolina, Oct. 2010.



## Broadband Availability

768 Kbps Download Speeds

94.70% Households Served Statewide



\*Percentage of households served by terrestrial, non-mobile service with speeds of at least 768 Kbps download and 200 Kbps upload

Source: Connect South Carolina, Oct. 2010.

<b>Broadband Inventory - Rural and All Household</b>			
<b>At Least 768 Kbps Download/200 Kbps Upload</b>	<b>Total Households ('000s)</b>	<b>Unserved Households ('000s)</b>	<b>Percent Households Served</b>
Rural Households	1,079	77	92.83%
All Households	1,534	81	94.70%

Source: Connect South Carolina, October 2010.

**95.2% of all unserved households across South Carolina are in rural areas**



## Rural/Urban Divide Across South Carolina

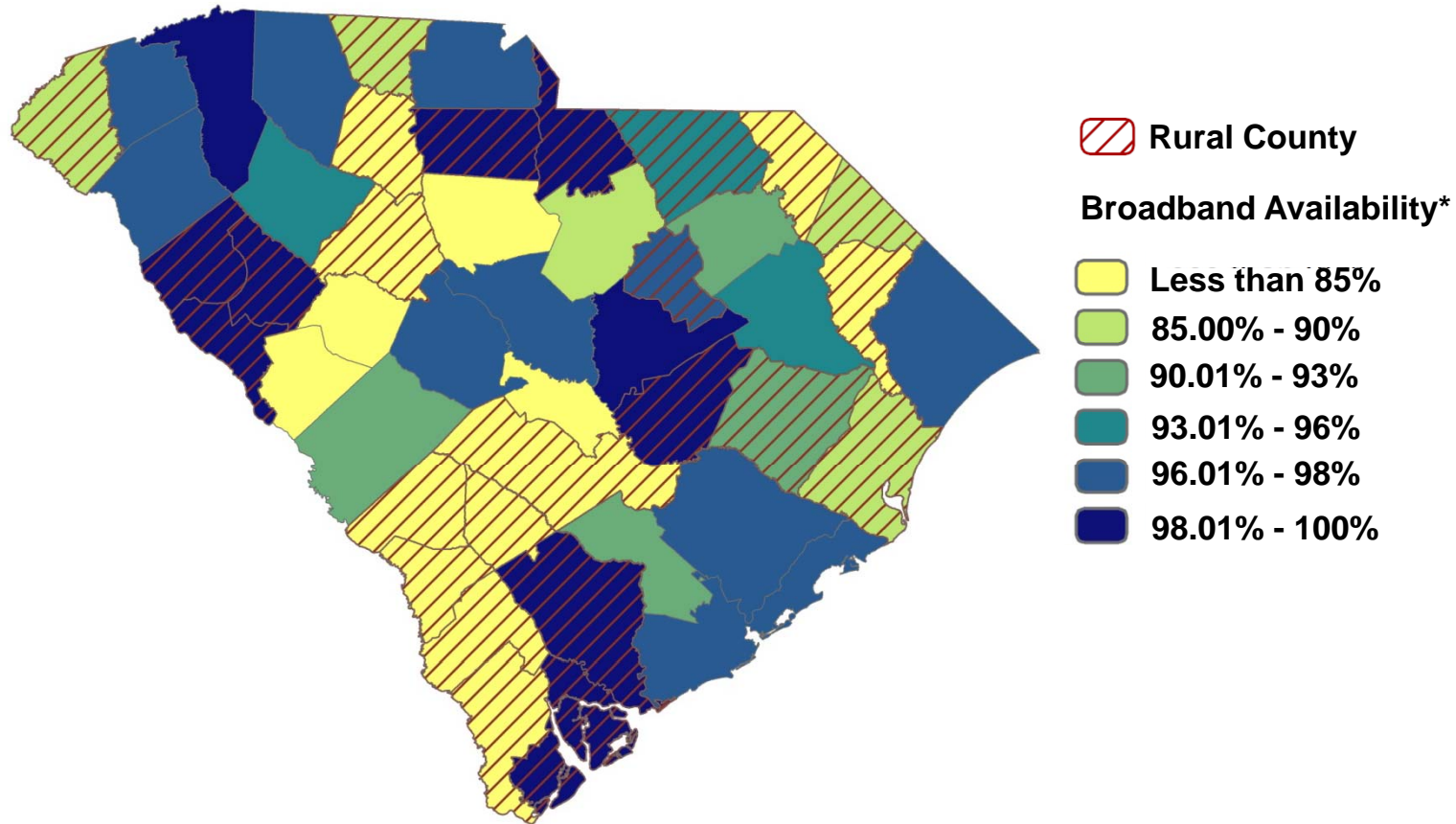
Download Speeds	Household Density Across Census Blocks with Households
Below 768 Kbps - "Unserved"	10.5
Between 768-3000 Kbps - "Underserved"	18.5
At Least 3 Mbps - "Served"	89.13

Statewide average household density is 50.94 households per square mile

Source: Connect South Carolina, October 2010.

# Rural/Rural Divide Broadband Availability

(3 Mbps Download Speeds)



\*Percentage of households served by terrestrial, non-mobile service with speeds of at least 3 Mbps download and 200 Kbps upload

Source: Connect South Carolina, Oct. 2010.



# Broadband Across Community Anchor Institutions

- Location and broadband connectivity data across 2500 South Carolina Community Anchor Institutions including:
  - K-12 schools
  - Libraries
  - Healthcare
  - Public Safety
  - Higher Education
  - Government
  - Non-Government

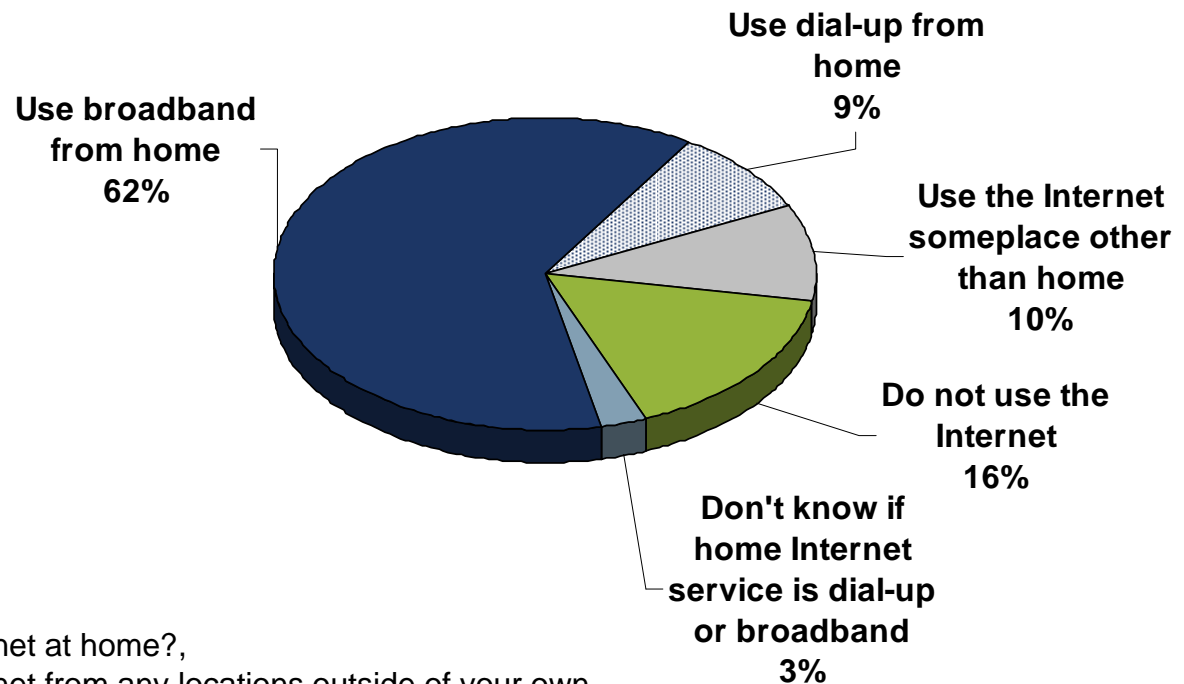
# Broadband & Technology Adoption Across South Carolina - 2010

# South Carolina Technology

Percent of all South Carolina residents

**Statewide, 62% of South Carolina residents (approximately 2.1 million adults) subscribe to home broadband service.**

**National surveys indicate that 67% of adults subscribe to home broadband service.**



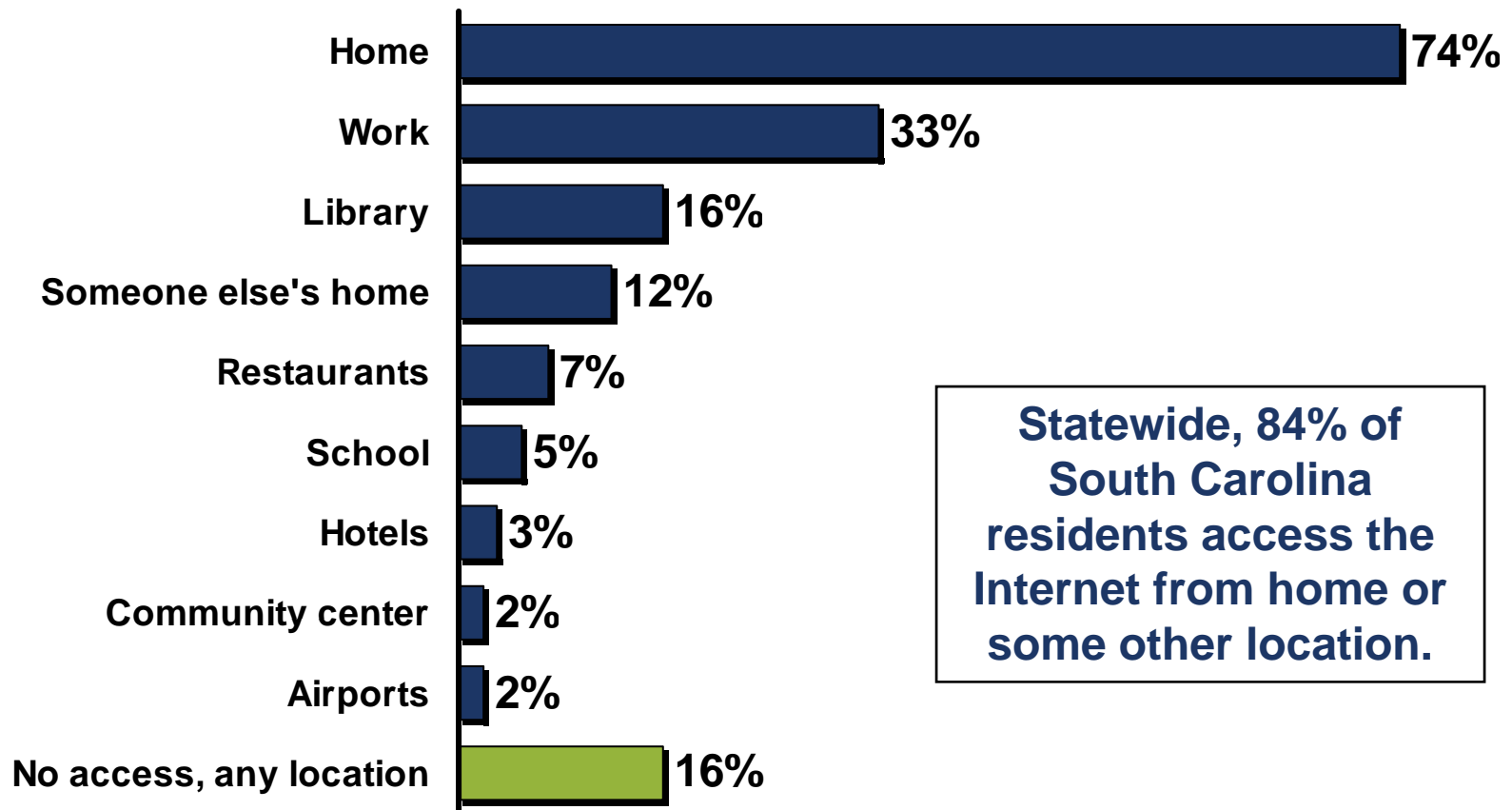
- Q: Do you have access to the Internet at home?,
  - Q: Do you have access to the Internet from any locations outside of your own home?, and
  - Q: Which of the following describes the type of Internet service you have at home?
- (n=1,200 SC residents)

Source: 2010 Connect South Carolina® Residential Technology Assessment  
[www.connectsc.org](http://www.connectsc.org)



# Where South Carolina Residents Access the Internet

Locations where South Carolina residents access the Internet\*



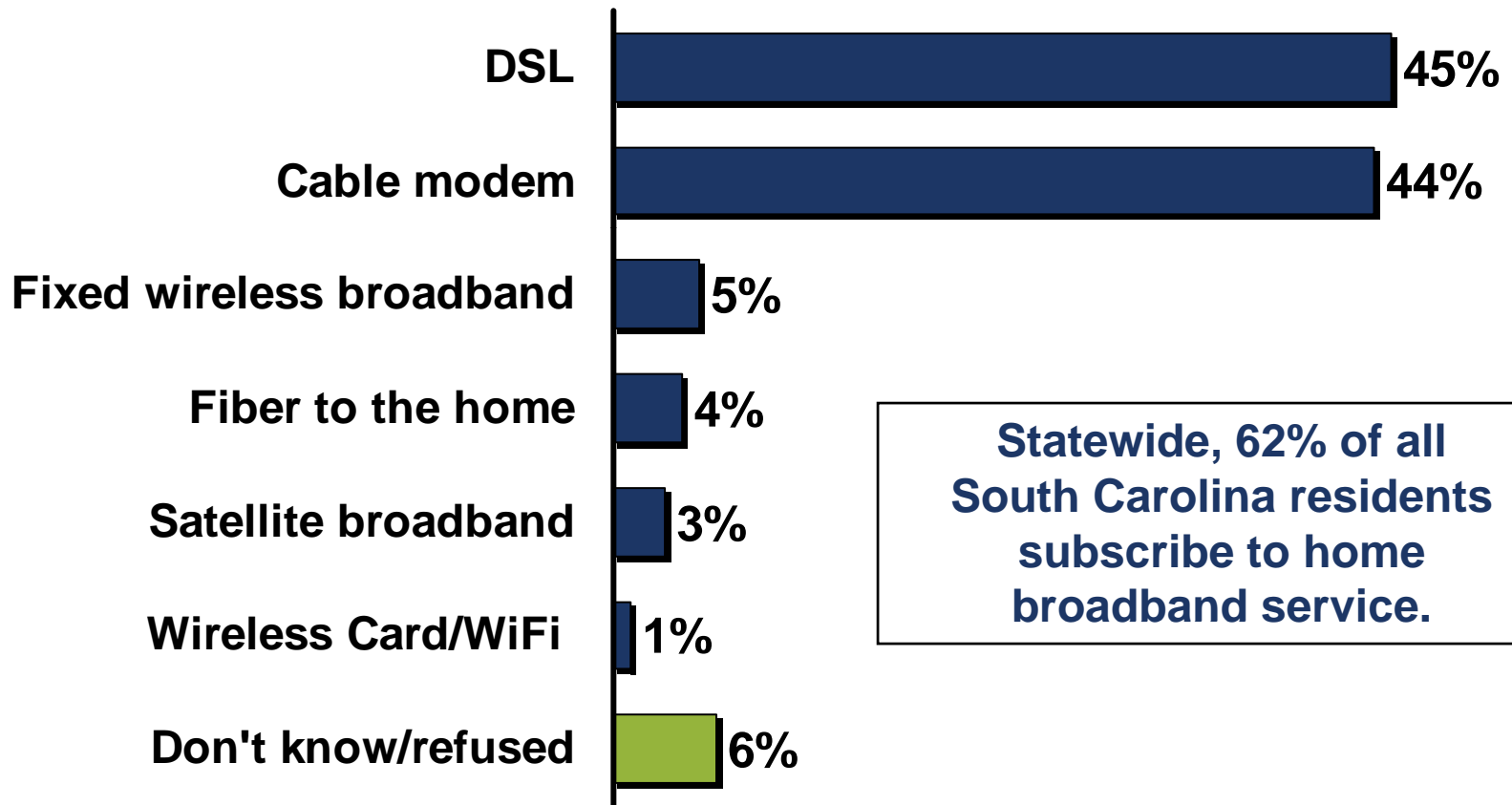
\*Percentages do not add up to 100% because individuals could give multiple responses.  
 Q: At what locations do you have access to the Internet?  
 (n=1,200 SC residents)

Source: 2010 Connect South Carolina®  
 Residential Technology Assessment  
[www.connectsc.org](http://www.connectsc.org)



# Types of Broadband Service That South Carolina Residents Use

Percent of all South Carolina broadband subscribers\*

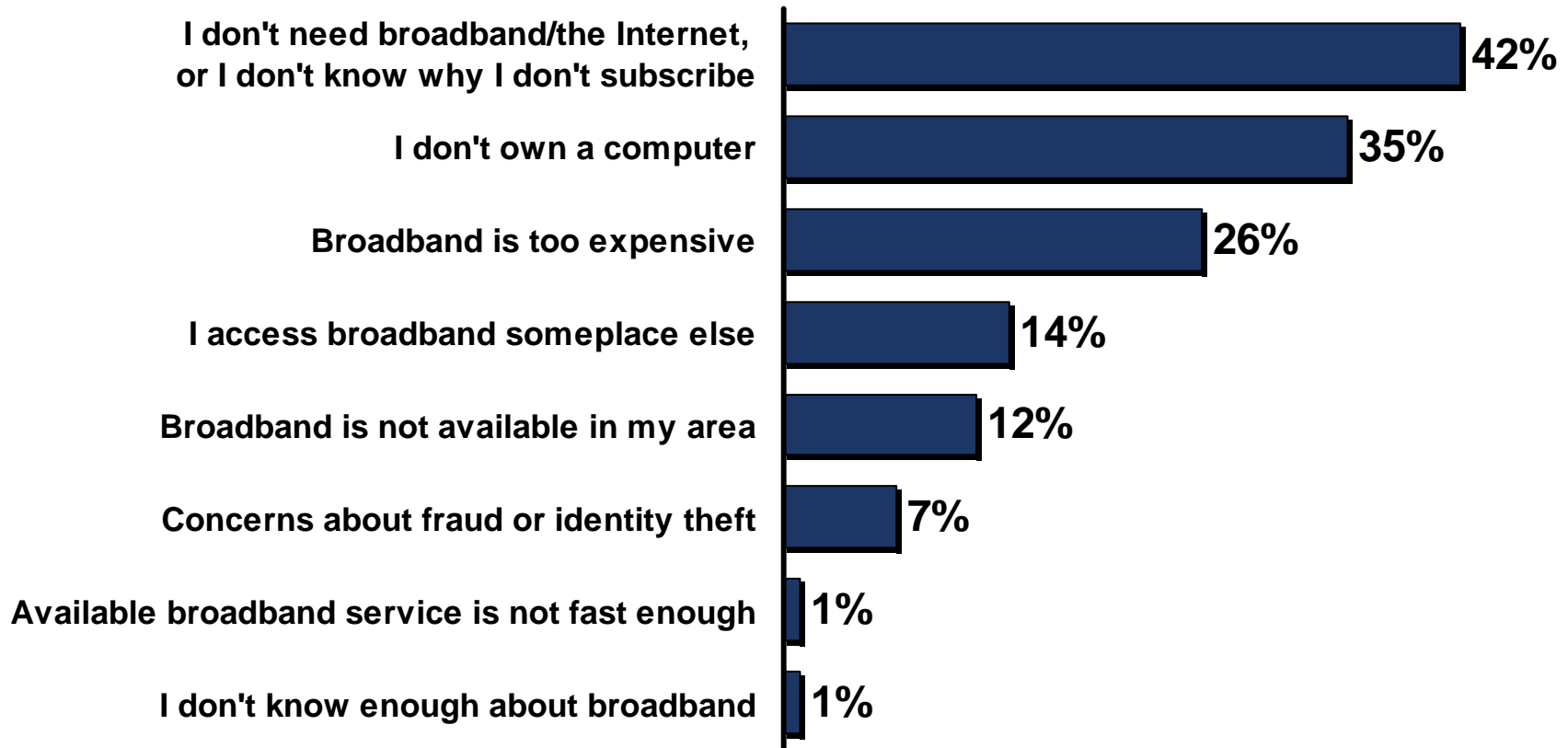


\*Percentages do not add up to 100% because individuals could give multiple responses.  
 Q: Which of the following describes the broadband service you have at home?  
 (n=720 SC residents with home broadband service)

Source: 2010 Connect South Carolina®  
 Residential Technology Assessment  
[www.connectsc.org](http://www.connectsc.org)

# Barriers to Broadband Adoption

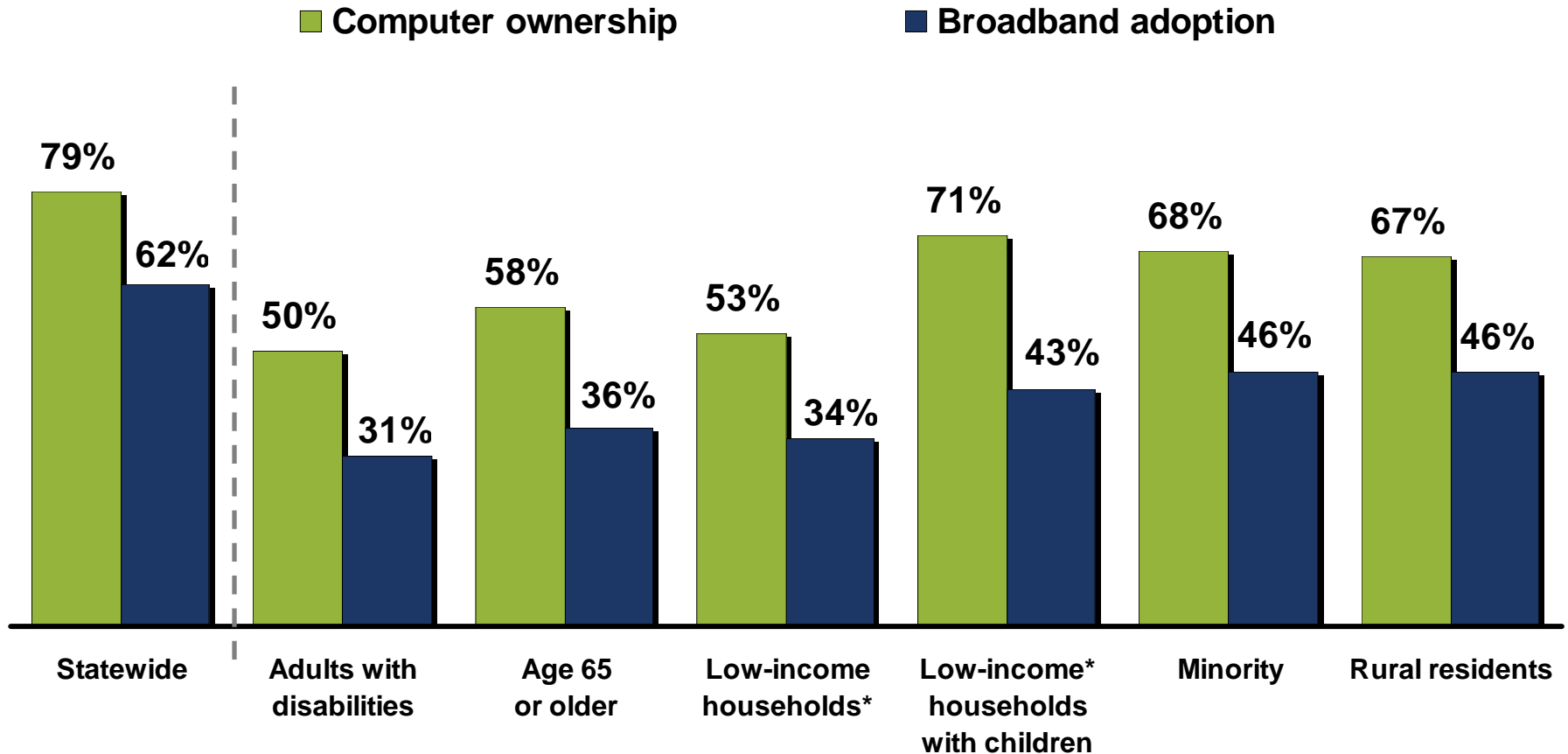
## Percent of South Carolina residents with no home broadband service



\*Percentages do not add up to 100% because individuals could give multiple responses.  
 Q: Why don't you subscribe to broadband Internet service?  
 (n=480 SC residents who do not have home broadband service)

Source: 2010 Connect South Carolina®  
 Residential Technology Assessment  
[www.connectsc.org](http://www.connectsc.org)

# Technology Adoption by Demographic



\*Low-income=annual household income less than \$25,000

Q: Does your household have a computer? and

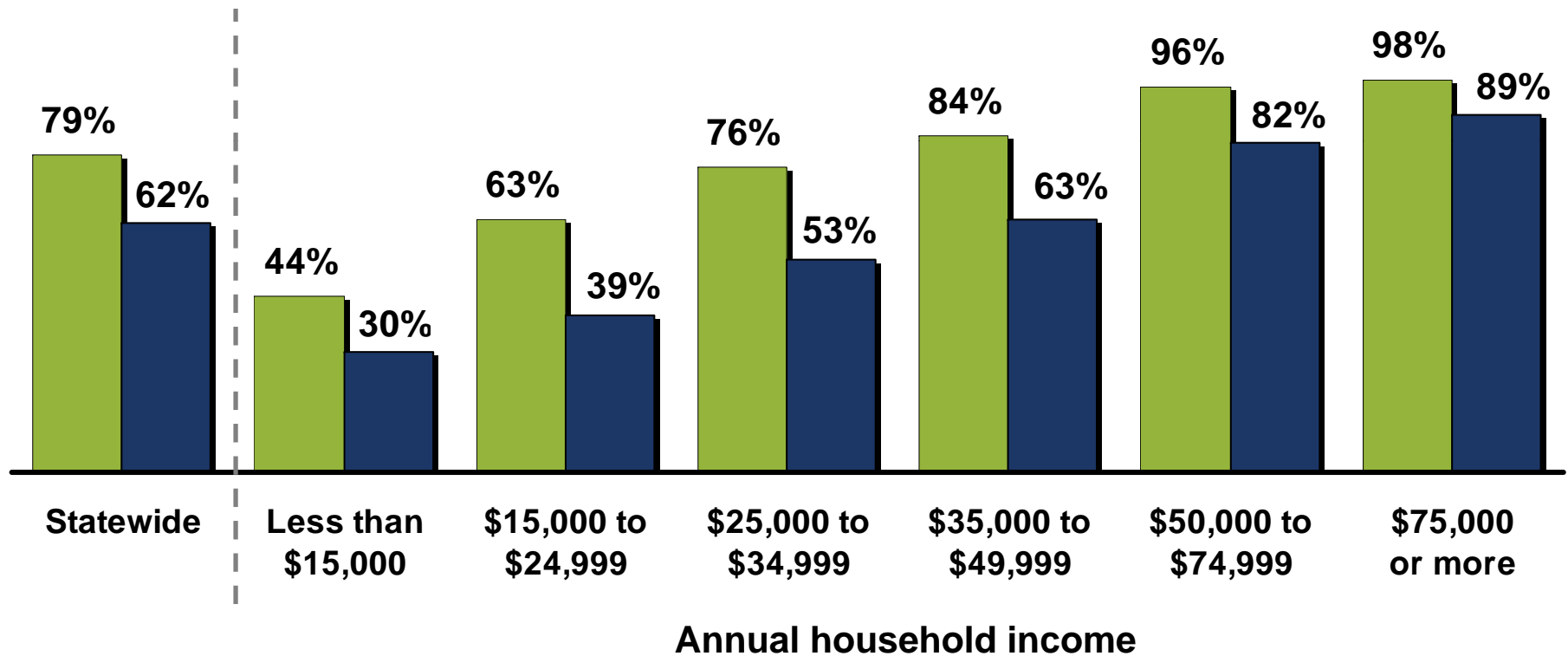
Q: Which of the following describes the type of Internet service you have at home?

(n=1,200 SC residents)

Source: 2010 Connect South Carolina®  
Residential Technology Assessment  
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# Technology Adoption by Income

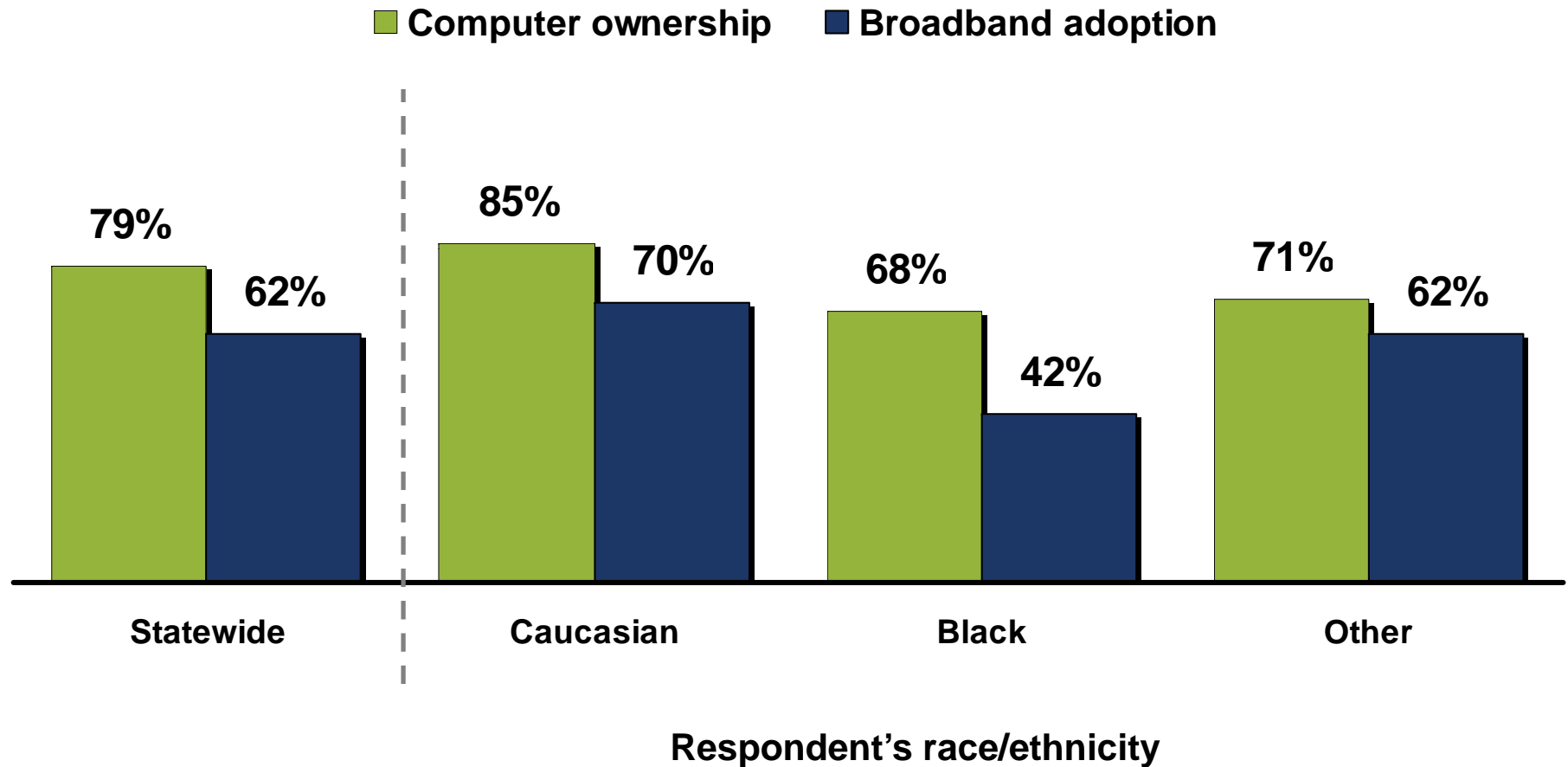
■ Computer ownership    ■ Broadband adoption



Q: Does your household have a computer? and  
 Q: Which of the following describes the type of Internet service you have at home?  
 (n=1,200 SC residents)

Source: 2010 Connect South Carolina®  
 Residential Technology Assessment  
[www.connectsc.org](http://www.connectsc.org)

# Technology Adoption by Race

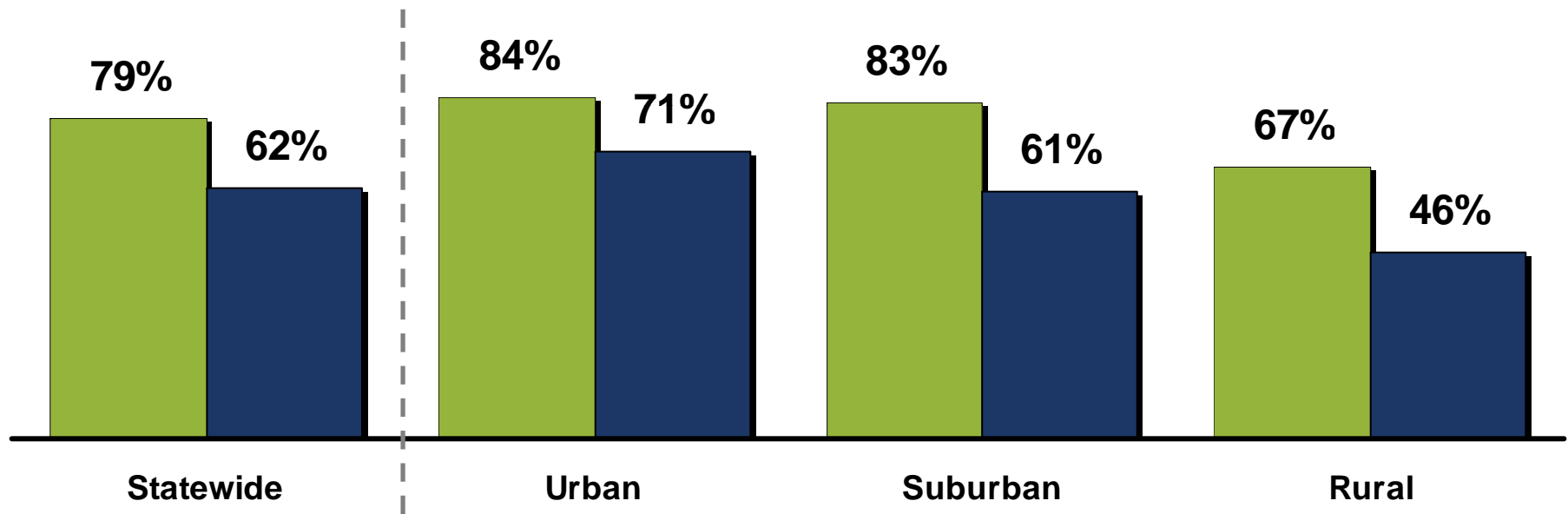


Q: Does your household have a computer? and  
 Q: Which of the following describes the type of Internet service you have at home?  
 (n=1,200 SC residents)

Source: 2010 Connect South Carolina®  
 Residential Technology Assessment  
[www.connectsc.org](http://www.connectsc.org)

# Technology Adoption by Urban-Rural Classification

■ Computer ownership   ■ Broadband adoption

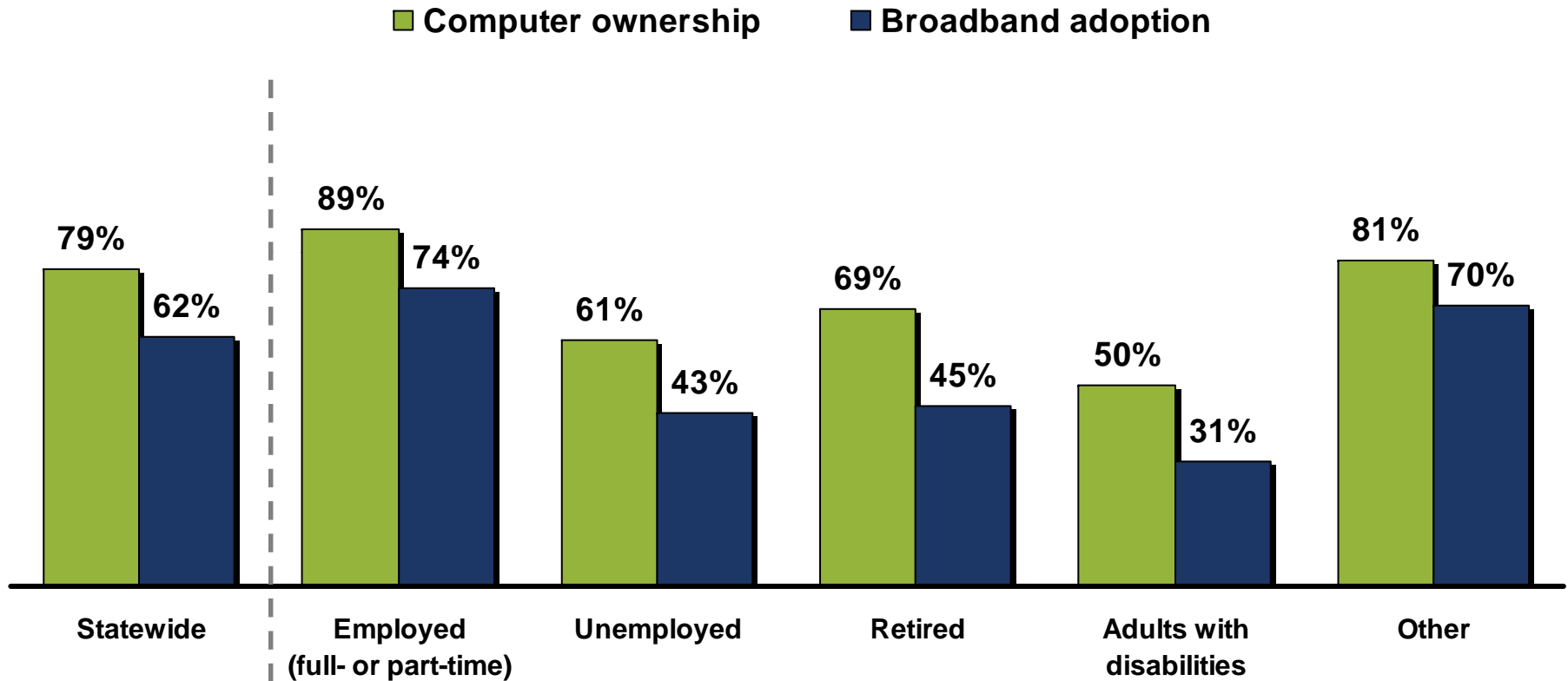


**Respondent's county of residence**

Q: Does your household have a computer? and  
 Q: Which of the following describes the type of Internet service you have at home?  
 (n=1,200 SC residents)

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# Technology Adoption by Employment Status



Q: Does your household have a computer? and  
 Q: Which of the following describes the type of Internet service you have at home?  
 (n=1,200 SC residents)

Source: 2010 Connect South Carolina®  
 Residential Technology Assessment  
[www.connectsc.org](http://www.connectsc.org)



# Connect South Carolina 2010 Residential Technology Assessment

Full Results Available:

[www.connectsc.org](http://www.connectsc.org)





# The Road Ahead

## Connect South Carolina will:

- Release the South Carolina Business Technology Assessment
- Produce a South Carolina Broadband Market Analysis & Recommendations for Broadband Expansion
- Conduct Local Research into Broadband and Technology Adoption and Usage
- Launch Regional Technology Planning Teams to Promote Broadband Development, Adoption and Usage
- Continue to Update Broadband Provider Data Through 2014 (6 month intervals):
  - Spring 2011 Data Submission Deadline: February 18, 2011
  - Spring 2011 Provider Approval Deadline: March 1, 2011



# Thank You!!

**Raquel Noriega**  
**Director of Public Policy**  
**Connected Nation**  
[rnoriega@connectednation.org](mailto:rnoriega@connectednation.org)

**Corey Johns**  
**Stakeholder Relations Manager**  
**Connect South Carolina**  
[cjohns@connectednation.org](mailto:cjohns@connectednation.org)