



Connect South Carolina

Statewide Broadband Adoption & Usage

Findings from the 2010 Residential Technology Assessment

November 8, 2010



Presentation Outline

Today's Agenda

- Recap of Connect South Carolina Efforts to Date
- Update of the Interactive Mapping Tool - South Carolina BroadbandStat
- Presentation of the 2010 Residential Technology Assessment
- Overview of Future Activities and Important Dates
- Q & A



Progress to Date

Connect South Carolina has:

- Built South Carolina's first interactive statewide broadband inventory (beta):
 - Statewide Total Households: 1,533,854
 - Statewide Broadband Covered Households: 1,452,541
 - Statewide Unserved Households: 81,313
 - Percentage Served: 94.70%
- Verified data for eighteen (18) qualified South Carolina providers (37.5%)
- Integrated data into South Carolina BroadbandStat interactive online mapping tool
 - Now with Community Anchor Institution data layer
- Updated static and interactive maps available at: www.connectsc.org
- Studied the Adoption Gap in South Carolina:
 - Produced Residential Technology Assessment: Complete results available at: www.connectsc.org
 - Conducted Business Technology Assessment (coming soon)



South Carolina BroadbandStat

Interactive Mapping Tool

www.connectsc.org



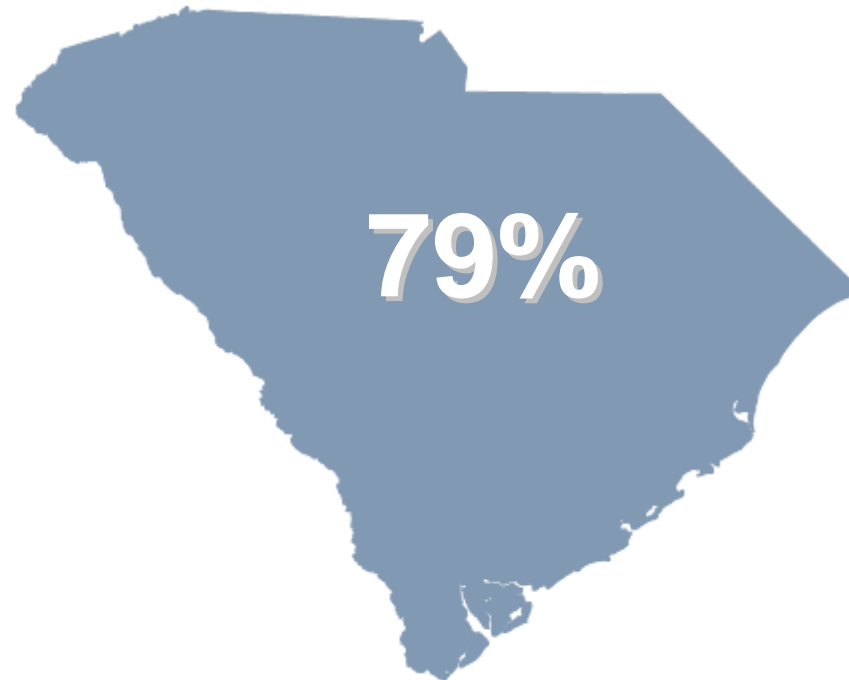
Connect South Carolina 2010 Residential Technology Assessment

Computer Ownership



South Carolina Residents With a Computer in Their Household

Percent of all South Carolina residents who own a computer



**Statewide, 79% of all residents own a home computer.
This translates into approximately 701,000 adults without a home computer.**

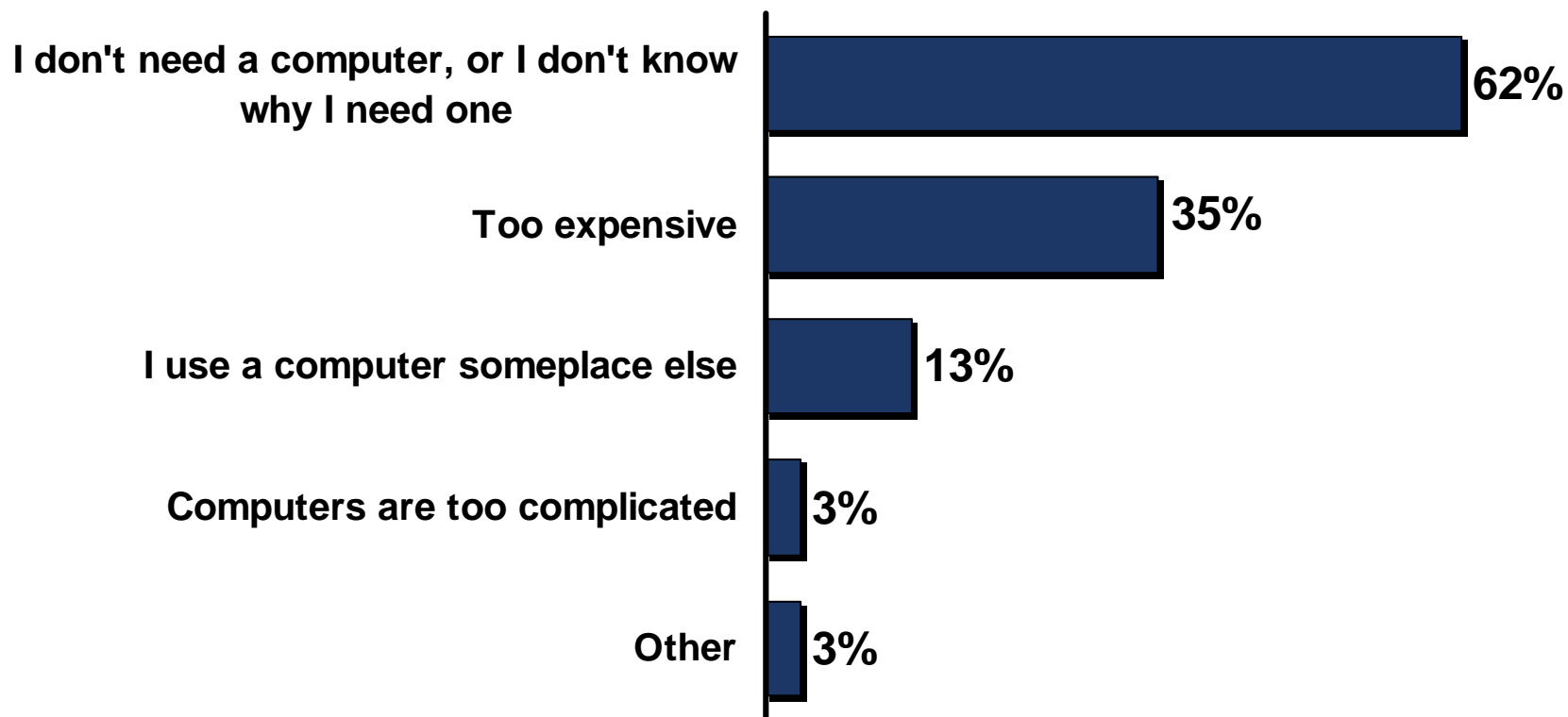
Q: Does your household have a computer?
(n=1,200 SC residents)

Source: 2010 Connect South Carolina®
Residential Technology Assessment
www.connectsc.org



Barriers to Computer Ownership

Among South Carolina residents with no computer at home*



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

Q: Why don't you have a computer at home?
(n=267 SC residents with no home computer)

Source: 2010 Connect South Carolina®
Residential Technology Assessment
www.connectsc.org



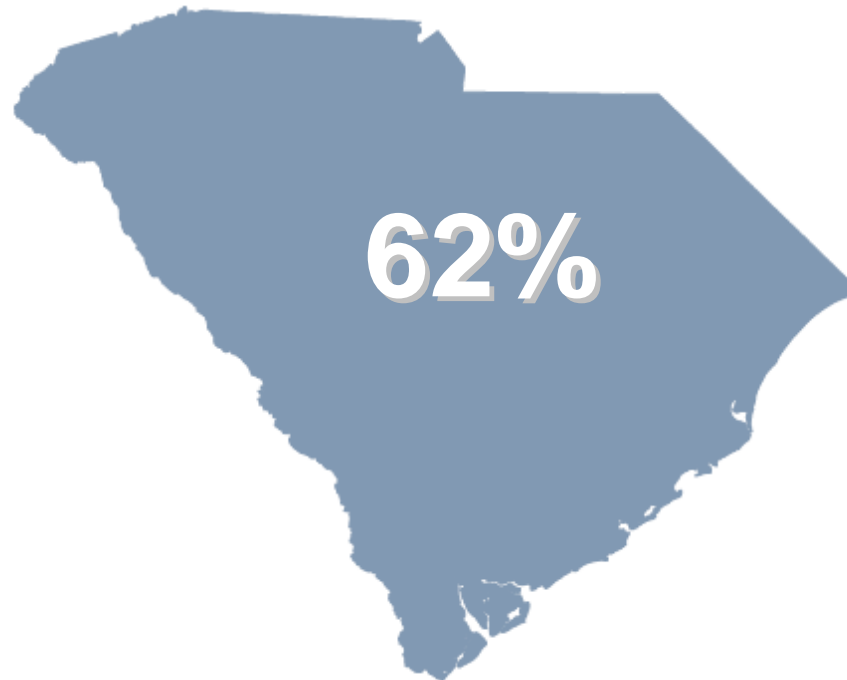
Broadband Adoption and Usage

www.connectsc.org



Broadband Adoption in South Carolina

Percent of all South Carolina residents who subscribe to home broadband service



Statewide, 62% of all South Carolina residents subscribe to home broadband service. This translates into approximately 2.1 million adults with broadband service at home.

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

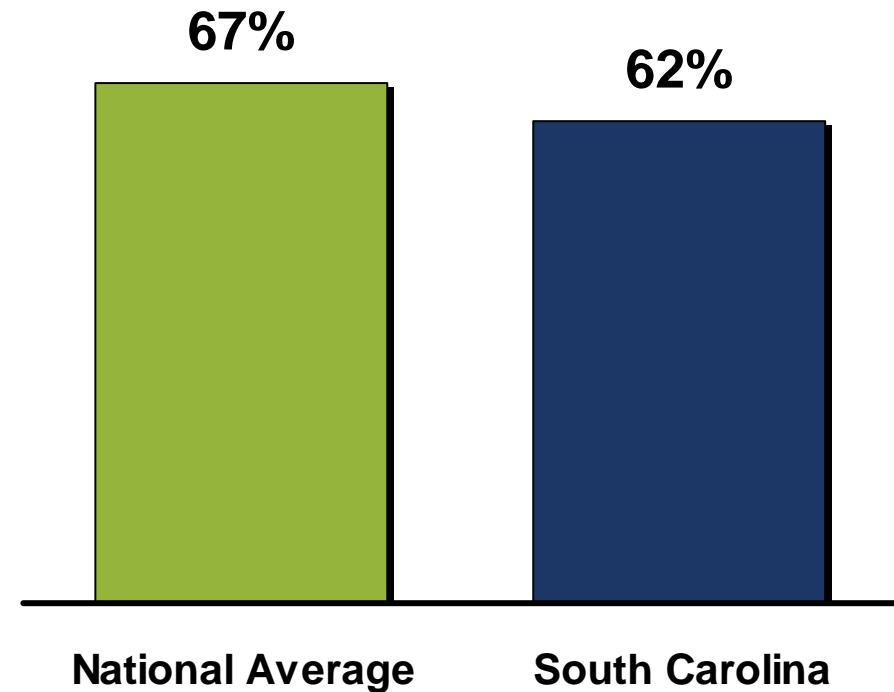


Broadband Adoption

Percent of all residents with broadband service at home

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

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



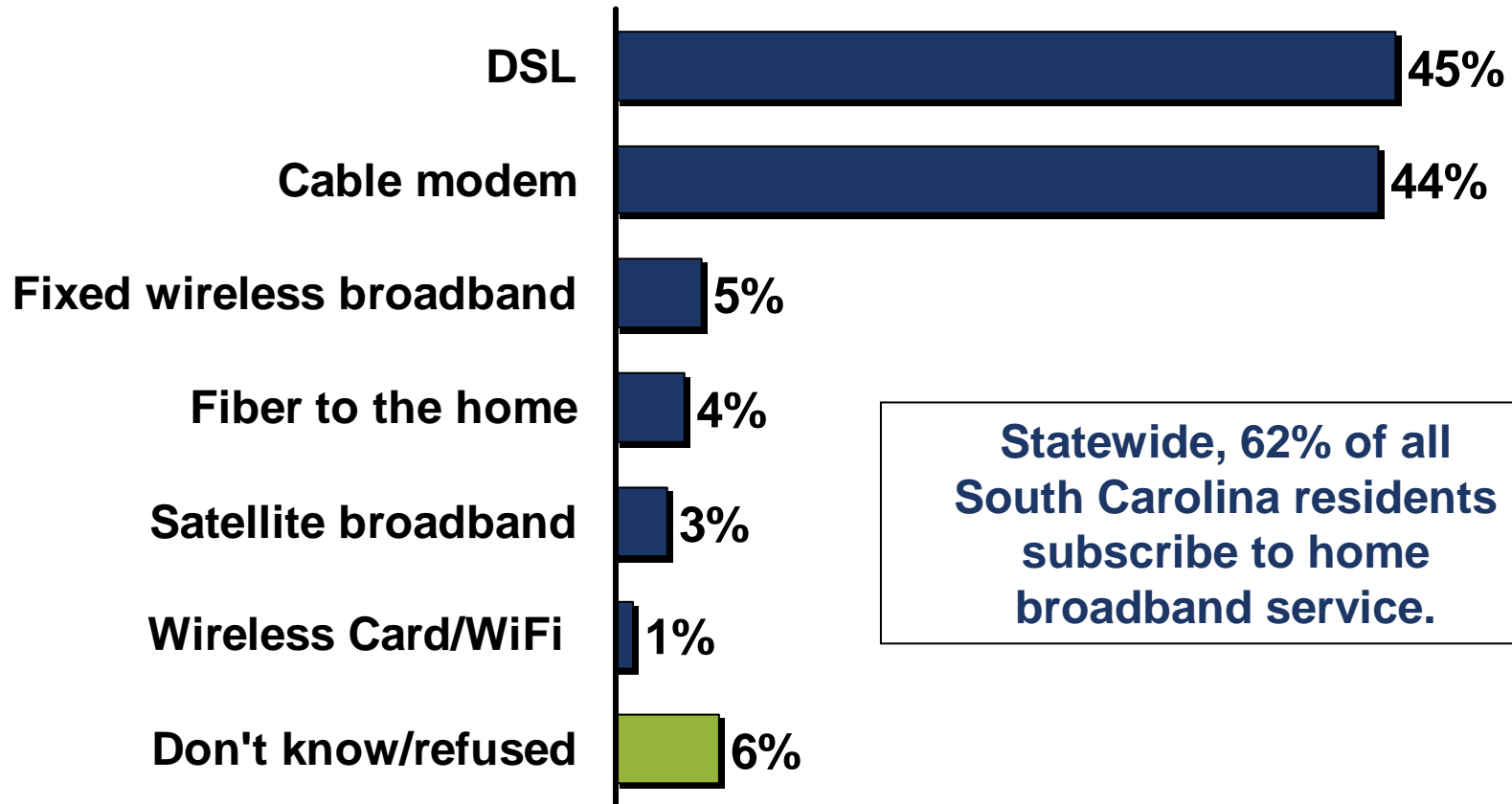
*Source: Federal Communications Commission, *Broadband Adoption and Use in America, 2010*.
Source: 2010 Connect South Carolina® Residential Technology Assessment
www.connectsc.org

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



Types of Broadband Service That South Carolina Residents Use

Percent of all South Carolina broadband subscribers*



Statewide, 62% of all South Carolina residents subscribe to home broadband service.

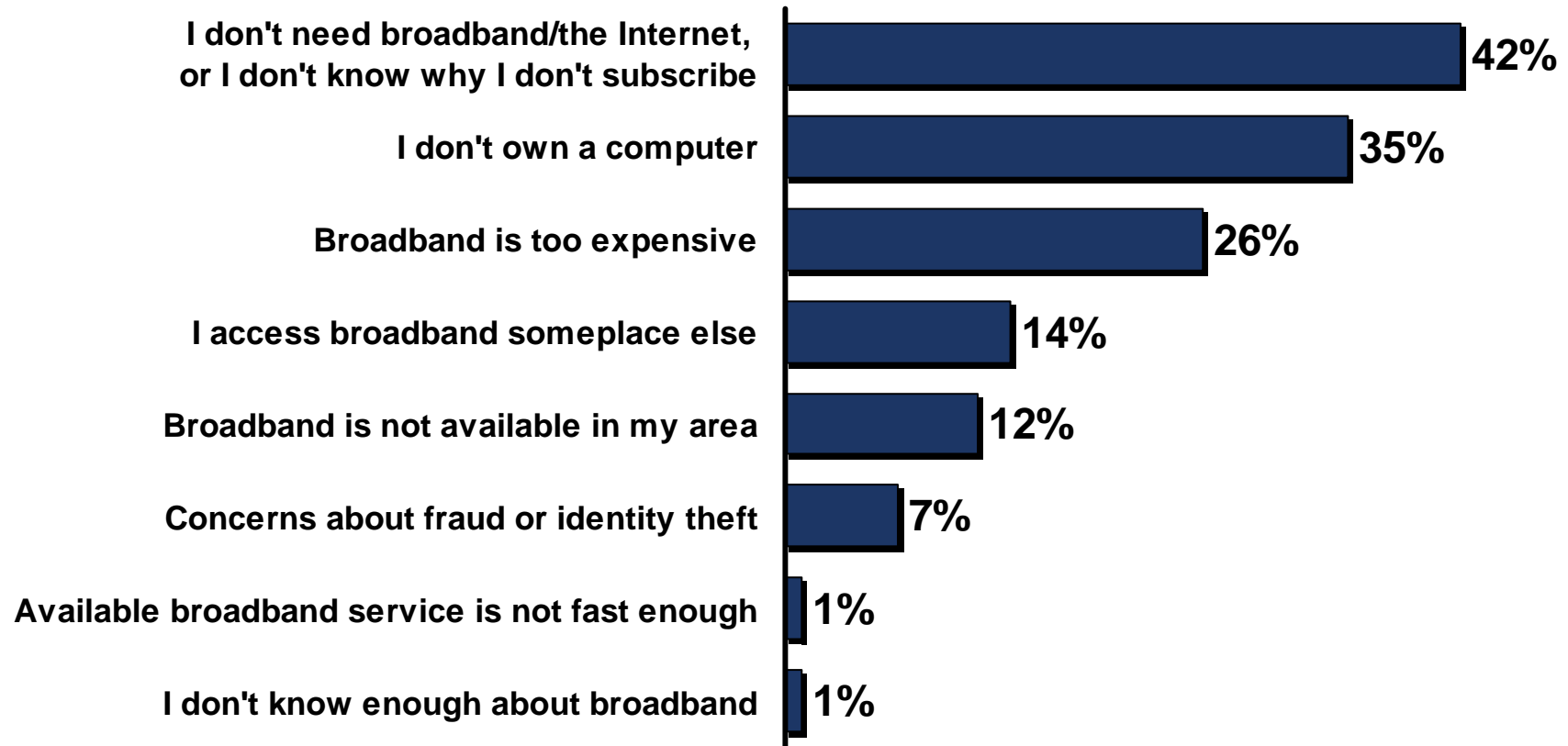
*Percentages do not add up to 100% because individuals could give multiple responses.
Q: Which of the following describes the broadband service you have at home?
(n=720 SC residents with home broadband service)

Source: 2010 Connect South Carolina® Residential Technology Assessment
www.connectsc.org



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)

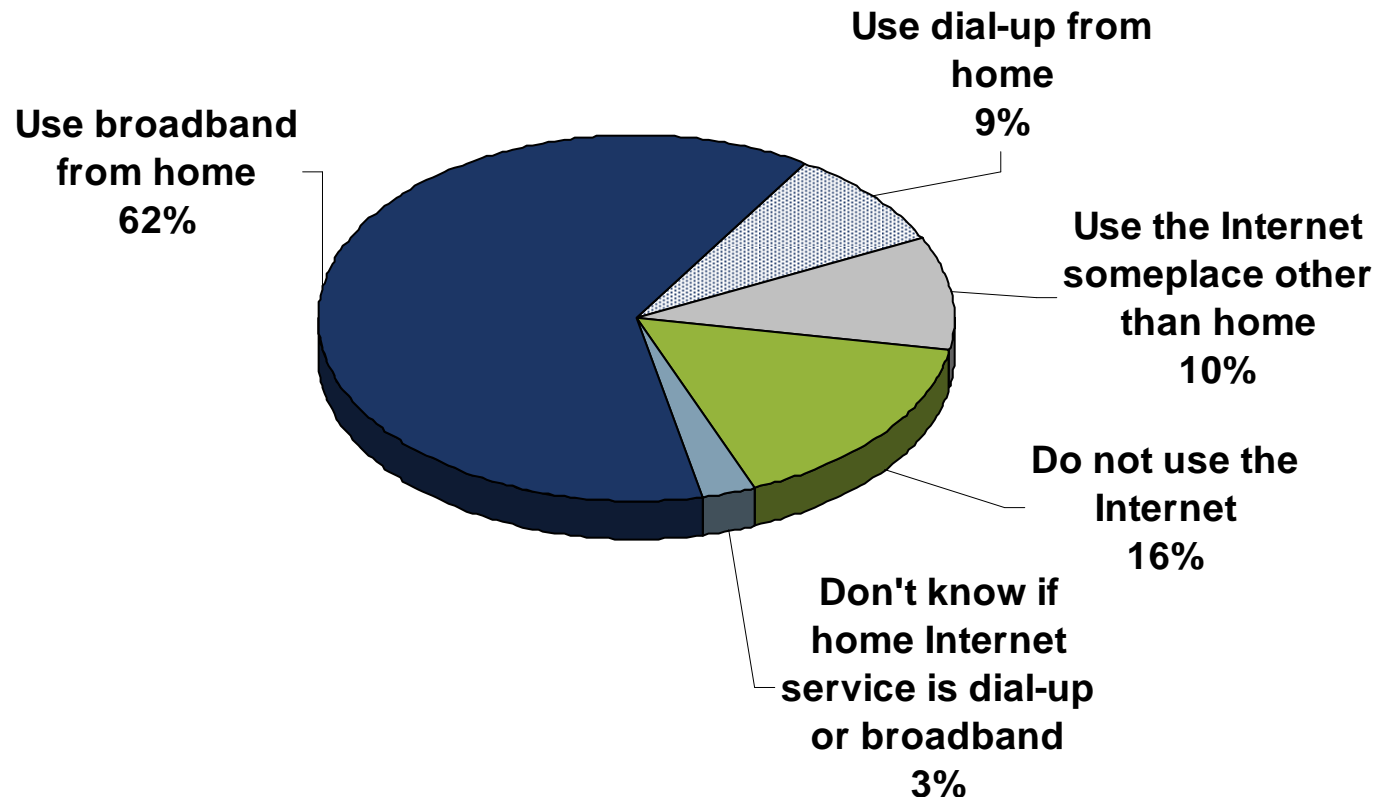
Source: 2010 Connect South Carolina®

Residential Technology Assessment

www.connectsc.org

South Carolina Technology Adoption Summary

Percent of all South Carolina residents



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

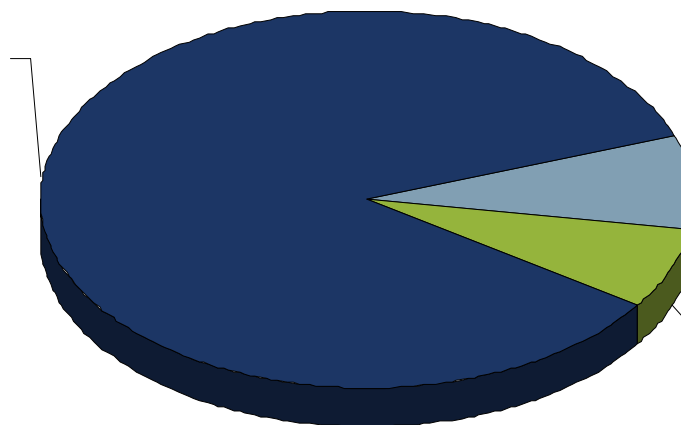
Perceptions of Broadband Availability in South Carolina

Awareness of broadband availability among South Carolina residents

Statewide, 7% of South Carolina residents report that broadband is not available where they live, and 8% do not know whether broadband service is available.

According to Connect South Carolina's provider-validated Broadband Service Inventory, 5.3% of households do not have broadband access.

Have broadband service, or say broadband is available where they live
85%



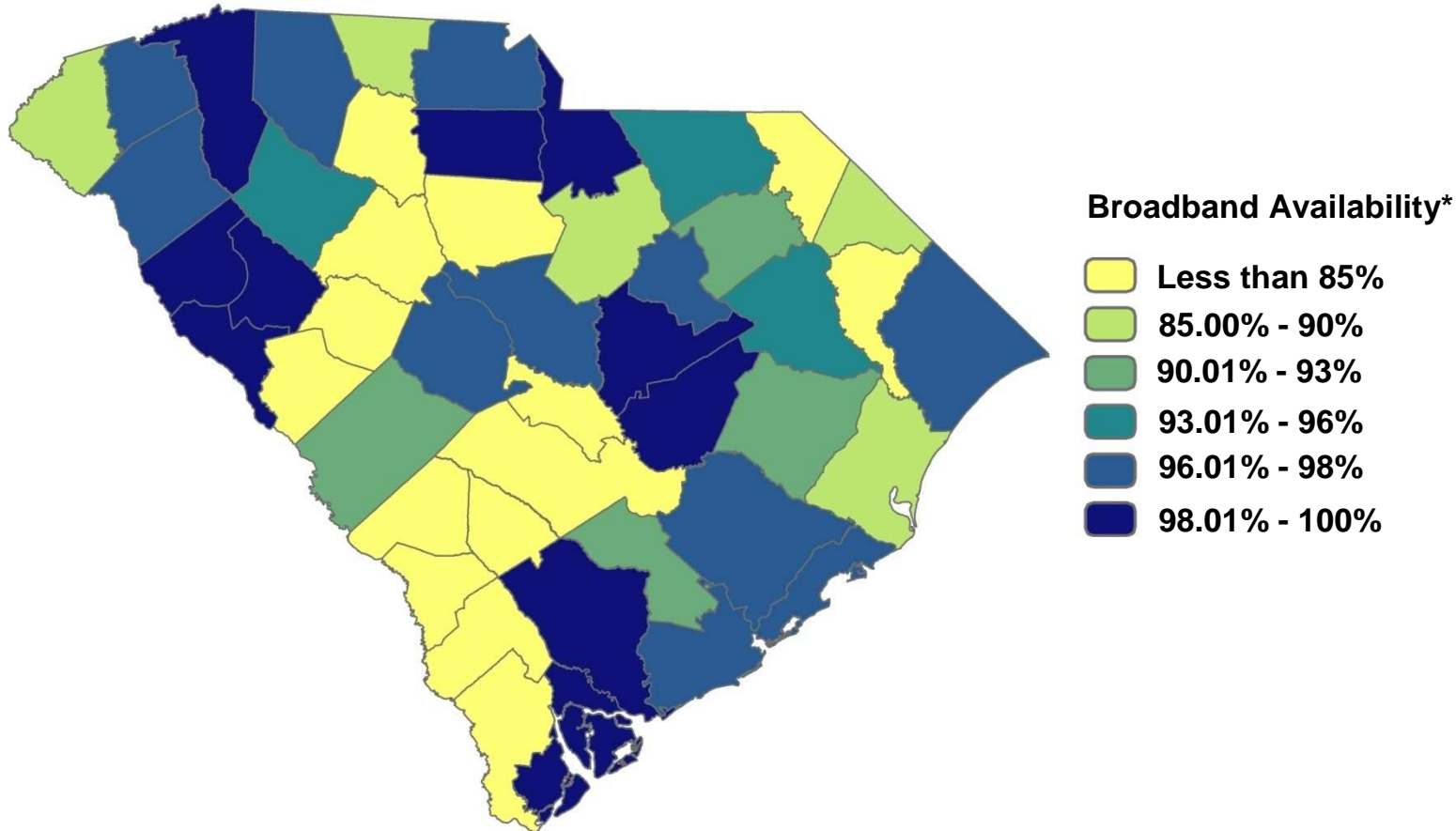
Don't know if broadband is available where they live
8%

Say broadband is not available where they live
7%

Q: To the best of your knowledge, is broadband or high-speed Internet service available in the area where you live?
(n=1,200 SC residents)

Source: 2010 Connect South Carolina®
Residential Technology Assessment
www.connectsc.org

Broadband Availability



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

Source: 2010 Q3 Connect South Carolina statewide broadband inventory map

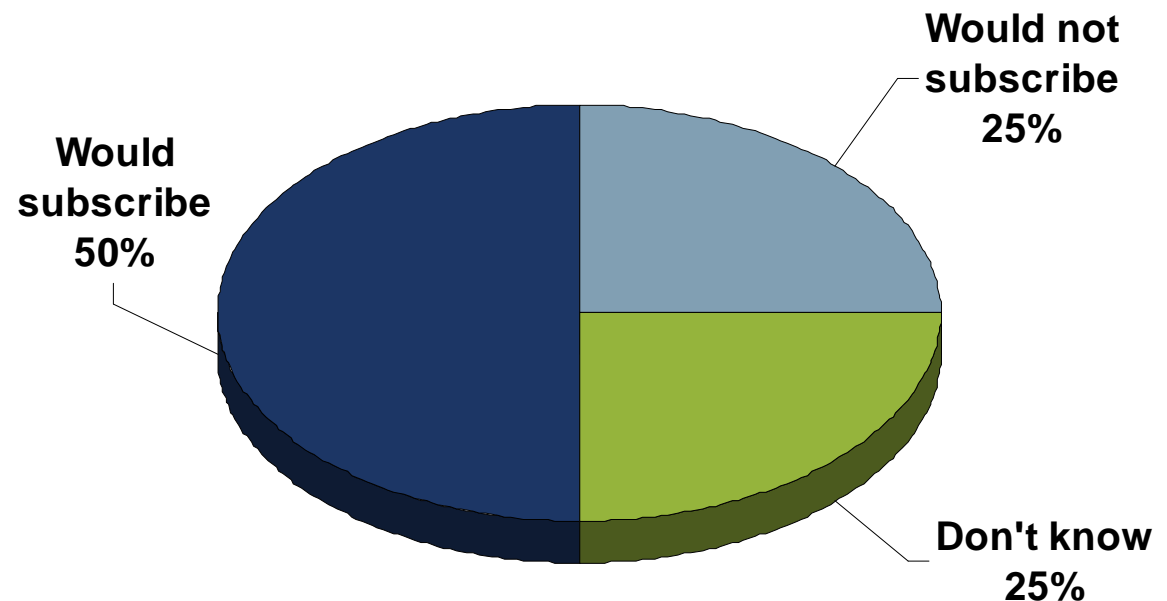
www.connectsc.org

Lack of Availability as a Barrier to Broadband Adoption

Among South Carolina dial-up subscribers who say broadband service is not available where they live

One-half of South Carolina dial-up users who say broadband service is unavailable say they would subscribe if it were available.

One-fourth of South Carolina dial-up users who say broadband service is unavailable would *not* subscribe to broadband even if it were available where they live.



Q: Would you sign up for broadband service if it were available in your area?

(n=86 SC Internet subscribers who do not have broadband, and report that broadband service is not available where they live)

Source: 2010 Connect South Carolina®
Residential Technology Assessment
www.connectsc.org



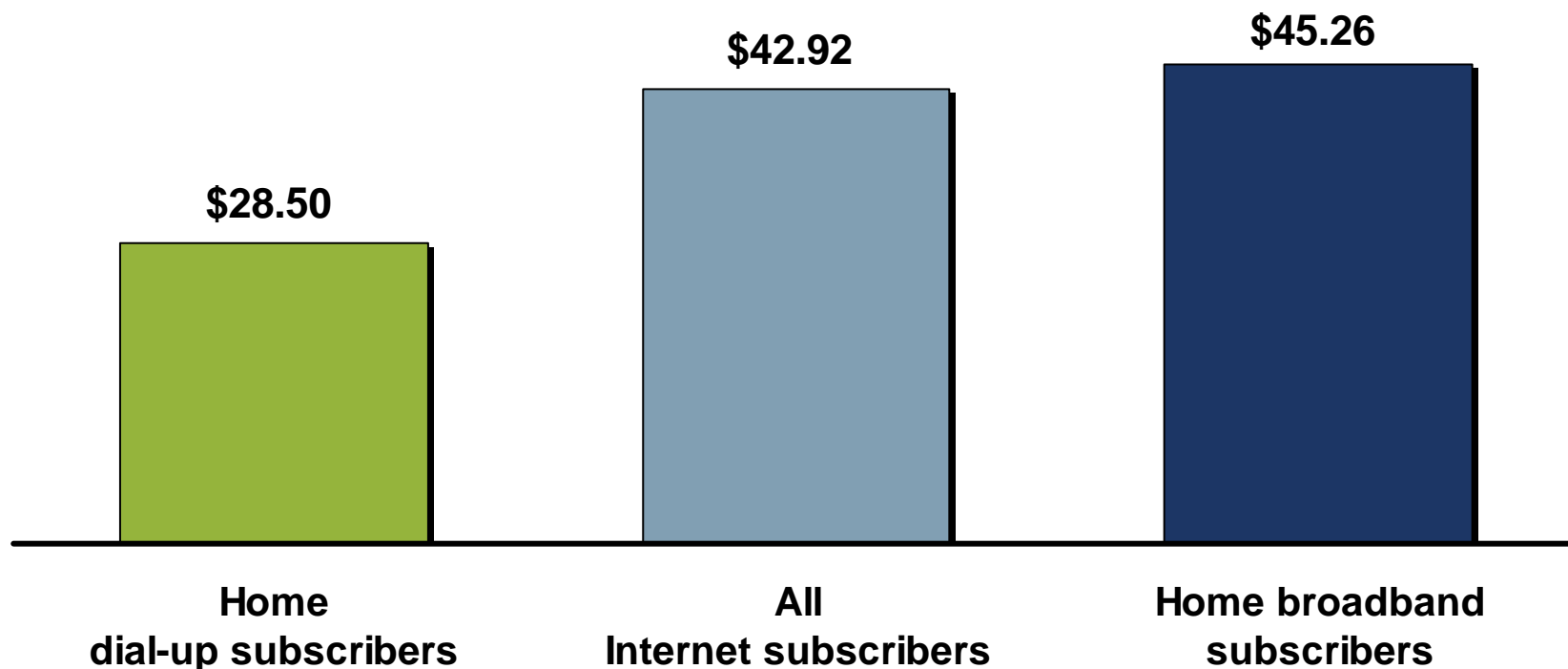
Prices Paid by South Carolina Residents for Internet Service

www.connectsc.org



Average Monthly Price South Carolina Residents Pay for Internet Service (Either Dial-Up or Broadband)

Average monthly price paid for home Internet service



Q: What do you pay each month for your Internet service?
(n=866 SC residents with Internet service at home)

Source: 2010 Connect South Carolina®
Residential Technology Assessment
www.connectsc.org



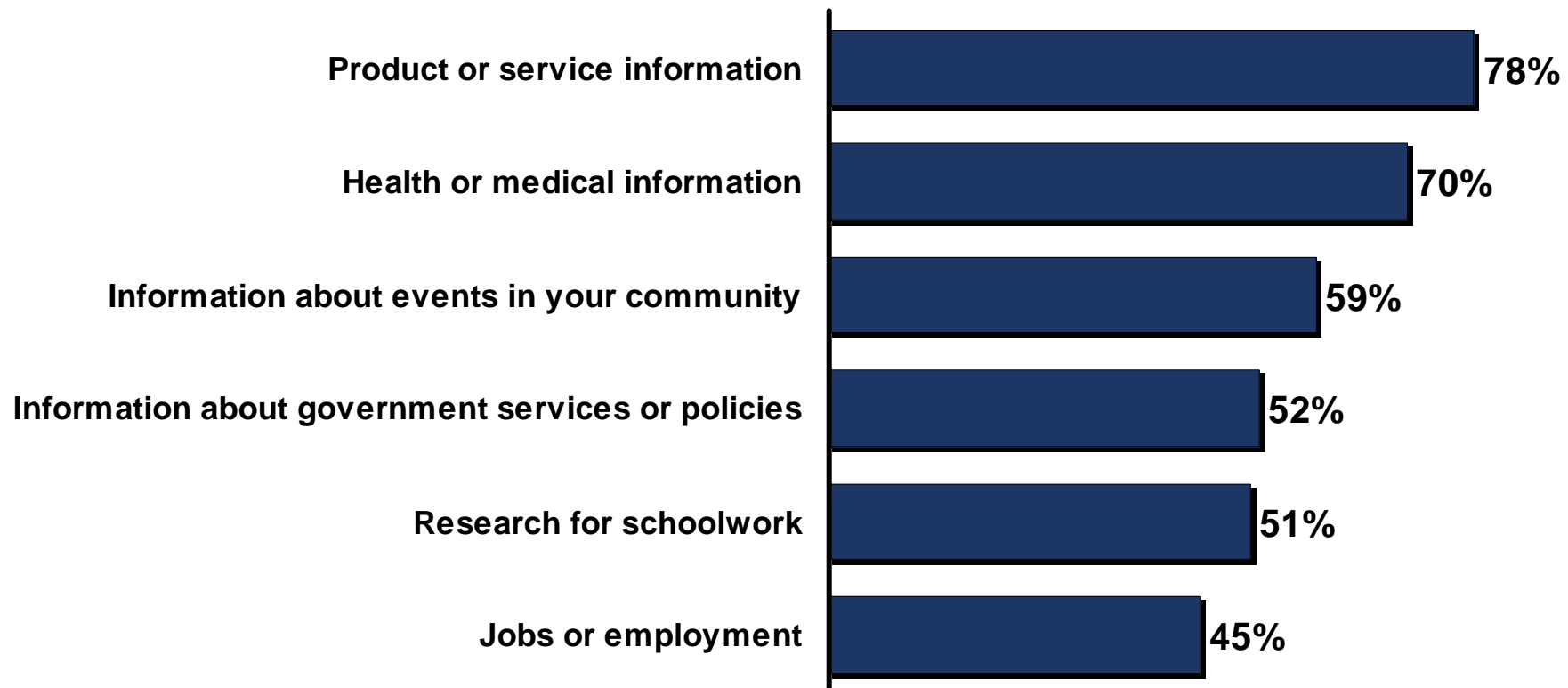
Online Activities Among South Carolina Internet Users

www.connectsc.org



Searching for Information Online

Percent of South Carolina Internet users who search for the following types of information online

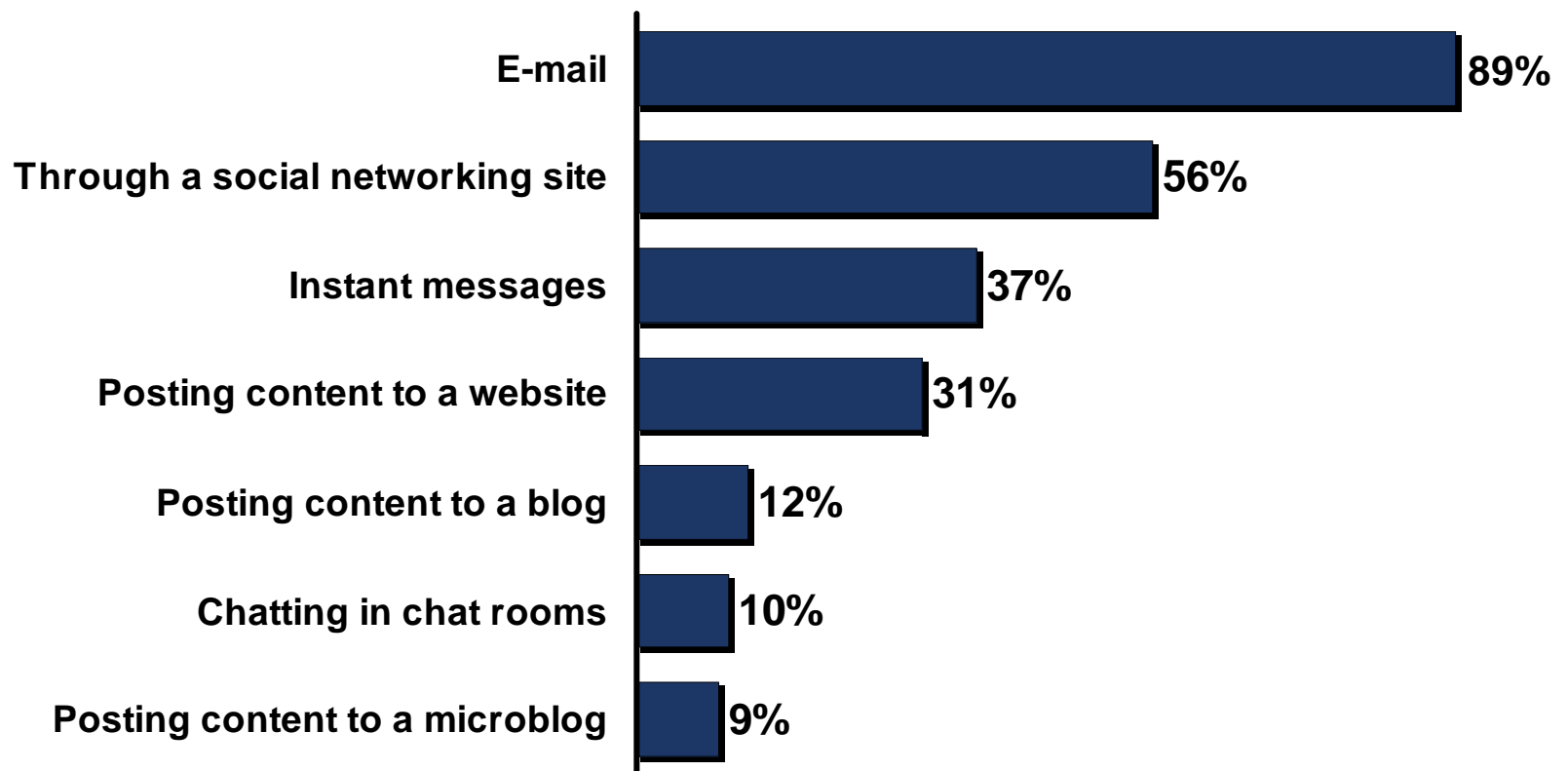


Q: Which of the following types of information do you use the Internet to look for online?
(n=988 SC Internet users)

Source: 2010 Connect South Carolina® Residential Technology Assessment
www.connectsc.org

Communicating Online

Percent of South Carolina Internet users who communicate in the following ways



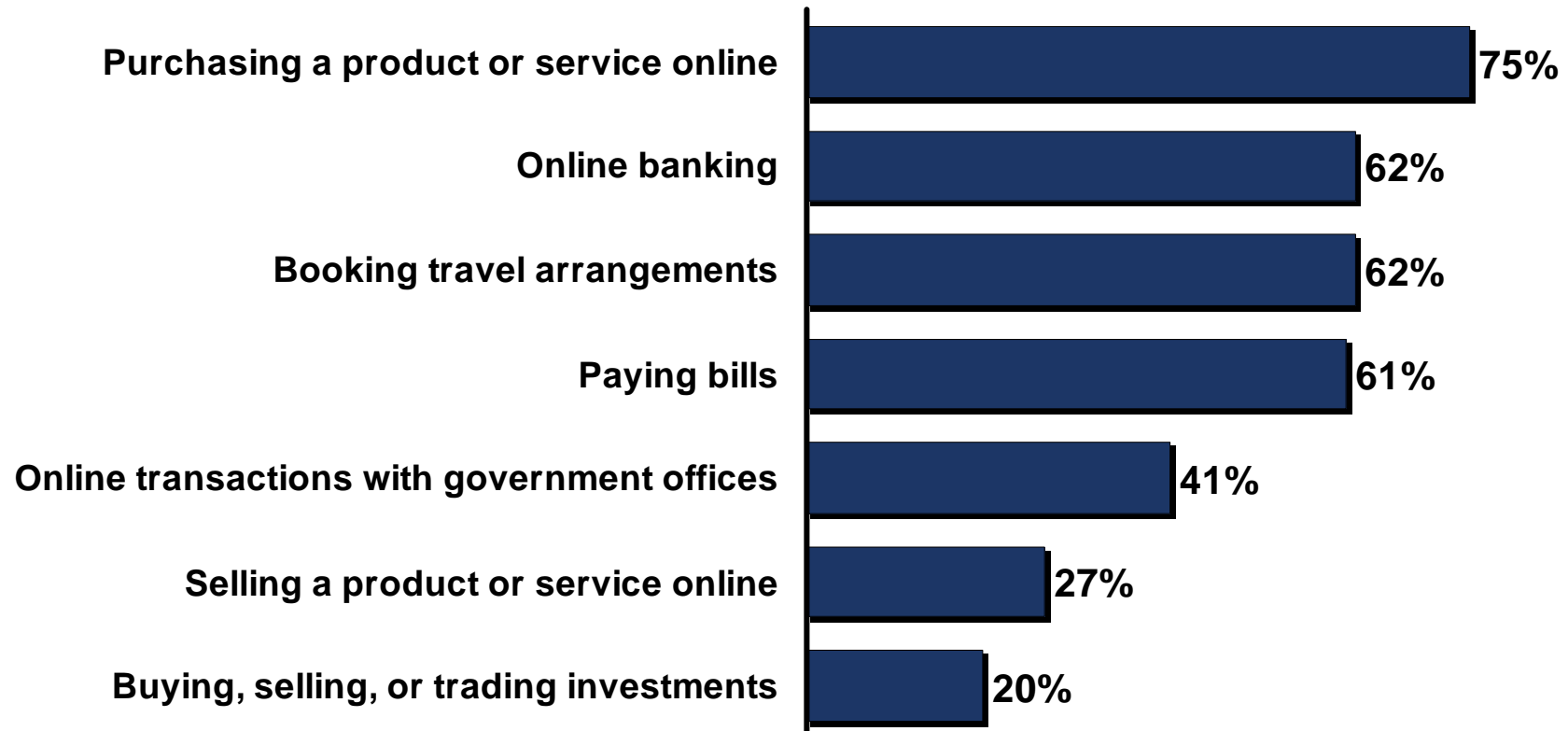
Q: Which of the following ways of communicating with others do you use?
(n=988 SC Internet users)

Source: 2010 Connect South Carolina®
Residential Technology Assessment
www.connectsc.org



Online Transactions

Percent of South Carolina Internet users who conduct the following transactions online



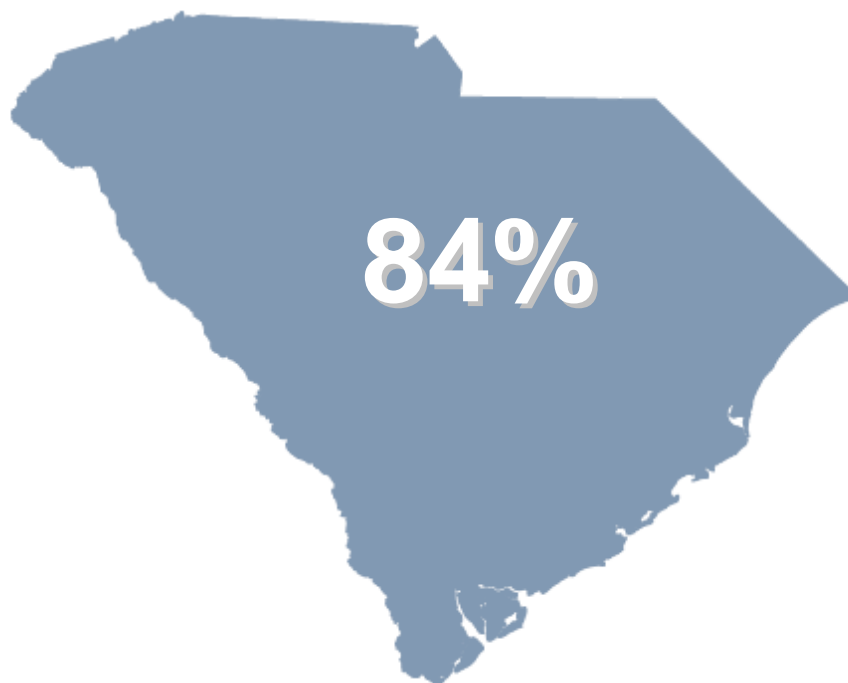
Q: Which of the following types of transactions have you completed online?
(n=988 SC Internet users)

Source: 2010 Connect South Carolina®
Residential Technology Assessment
www.connectsc.org

Mobile Technology Use

Cell Phone Ownership

Percent of South Carolina residents who own (or use) a cell phone



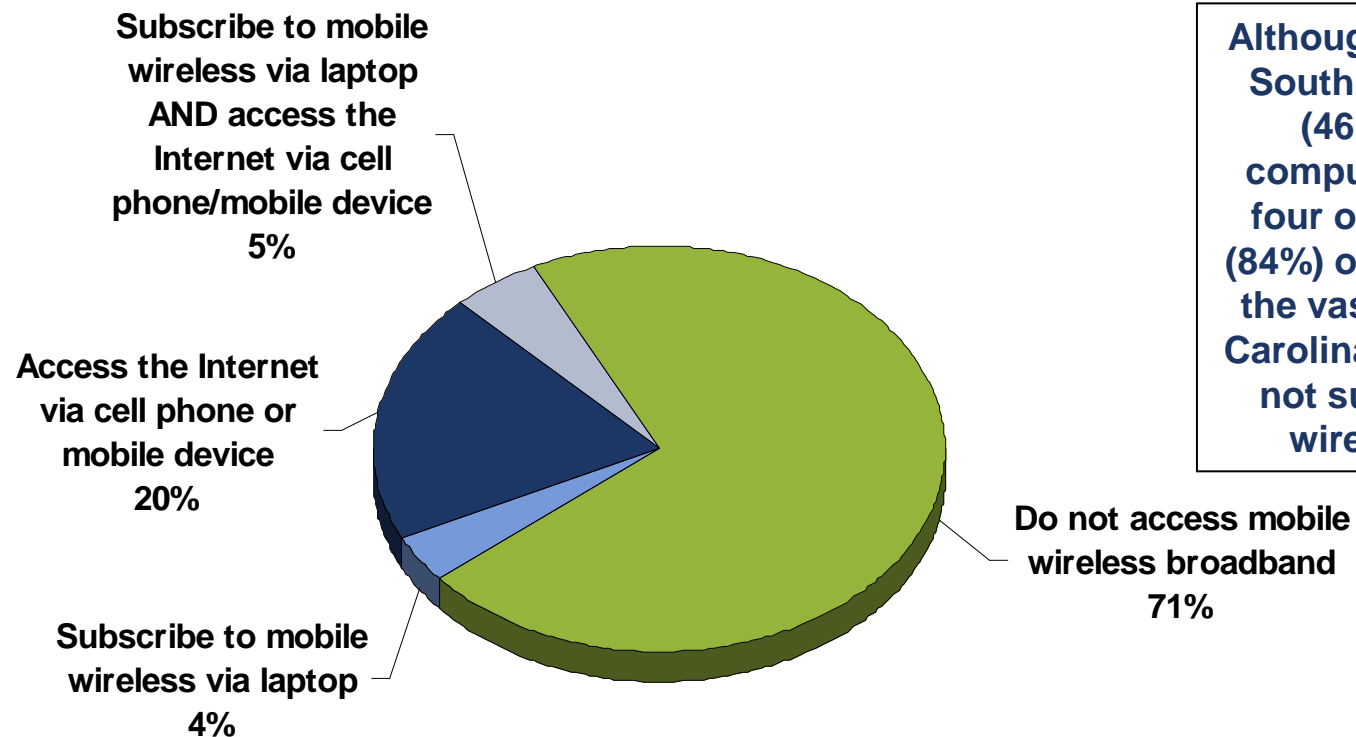
**Statewide, 84% of all South Carolina adults own or use a cell phone.
This translates into more than 2.8 million adults who own or use a cell phone.**

Q: Do you have a cell phone?
(n=1,200 SC residents)

Source: 2010 Connect South Carolina®
Residential Technology Assessment
www.connectsc.org

Mobile Wireless Broadband Adoption

Percent of all South Carolina residents



Although nearly one-half of South Carolina residents (46%) own a laptop computer, and more than four out of five residents (84%) own a cellular phone, the vast majority of South Carolina residents (71%) do not subscribe to mobile wireless broadband.

Q: On your laptop computer, do you subscribe to mobile wireless service that allows you to access the Internet through a cellular network? and

Q: Do you access the Internet through a cellular phone or other mobile device?
(n=1,200 SC residents)

Source: 2010 Connect South Carolina®
Residential Technology Assessment
www.connectsc.org



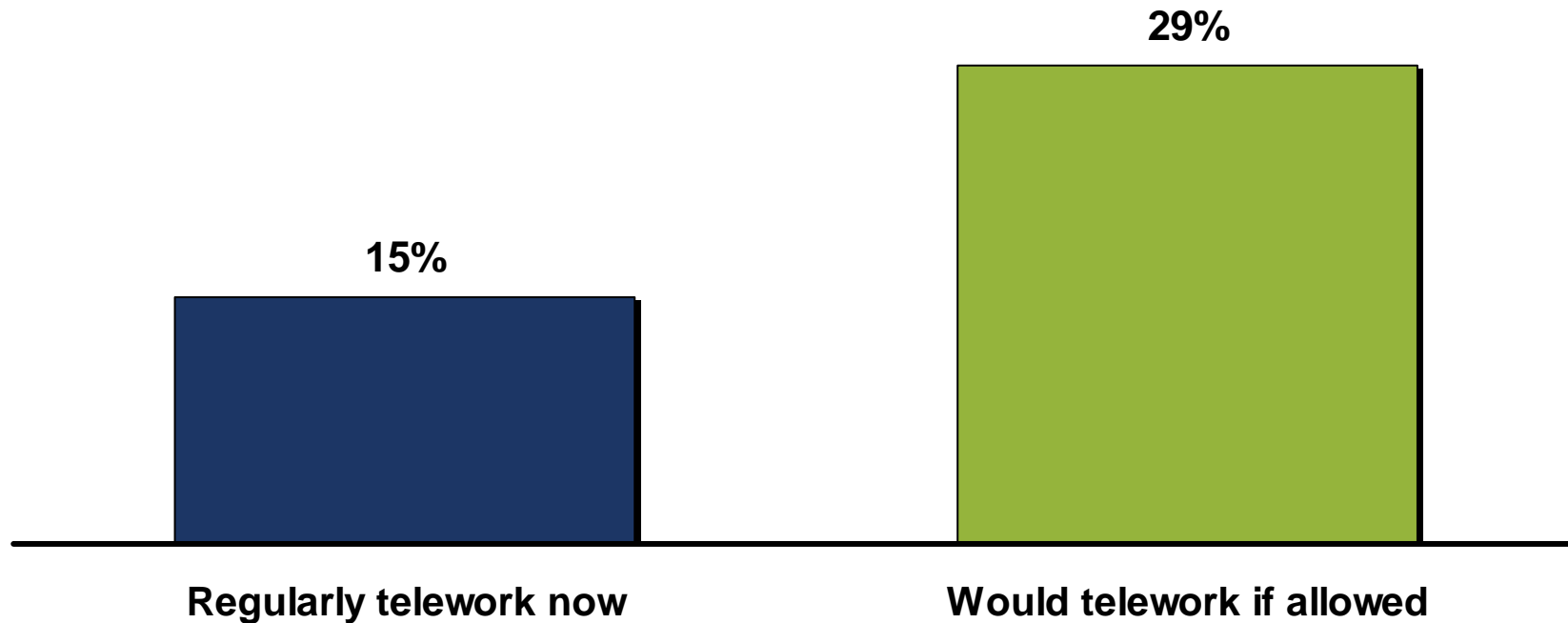
Teleworking and Working From Home Through an Internet Connection

www.connectsc.org



South Carolina Residents and Telework

Among South Carolina residents employed full-time or part-time



Q: Which of the following describes the way you work from home? And
Q: Would you be interested in teleworking if your employer allowed it?
(n=657 SC residents employed full-time or part-time)

Source: 2010 Connect South Carolina®
Residential Technology Assessment
www.connectsc.org

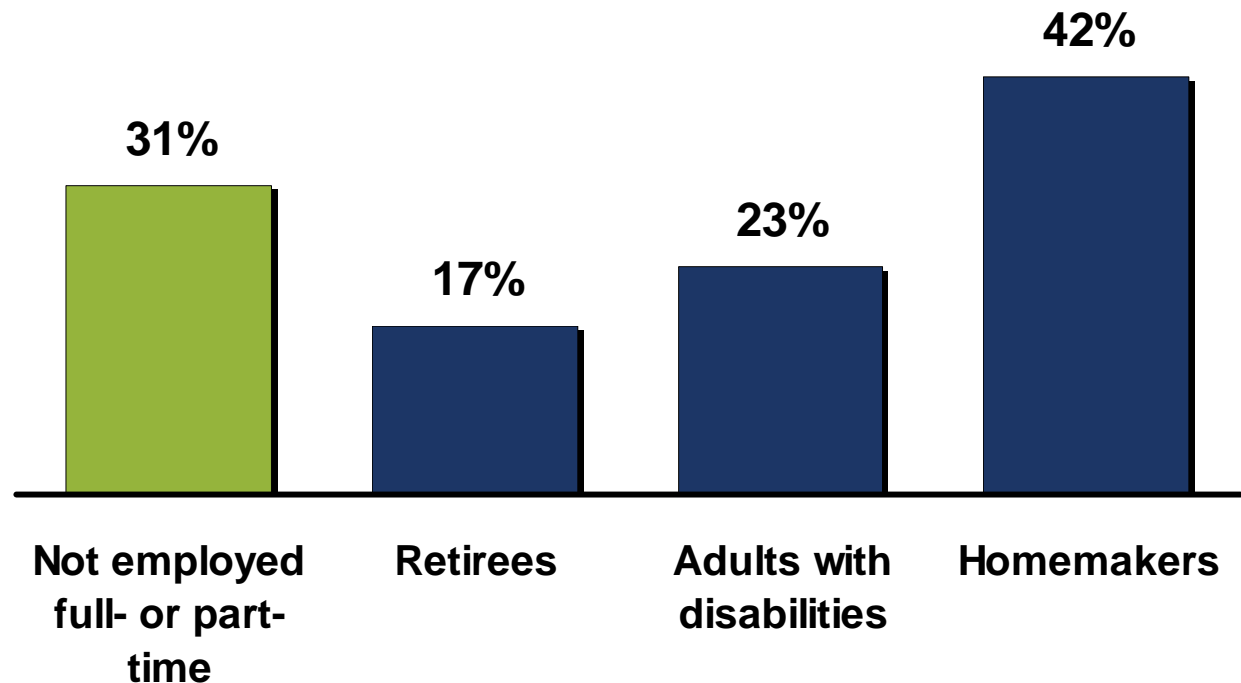


The Potential Impact of Telework on the Labor Force

South Carolina residents who are not currently employed and are “very likely” or “somewhat likely” to work outside the home if allowed to telework

Teleworking could provide a boost to the state’s workforce, as nearly one-third of the South Carolina residents who are not currently employed say they would likely telework if empowered to do so.

This includes one-sixth (17%) of retirees, nearly one-quarter (23%) of adults with disabilities, and more than two out of five (42%) homemakers who say they would telework if empowered to do so.



Q: If you were able to work from home through a broadband connection - commonly known as teleworking - how likely is it that you would work outside the home?
(n=508 SC residents not employed full-time or part-time)

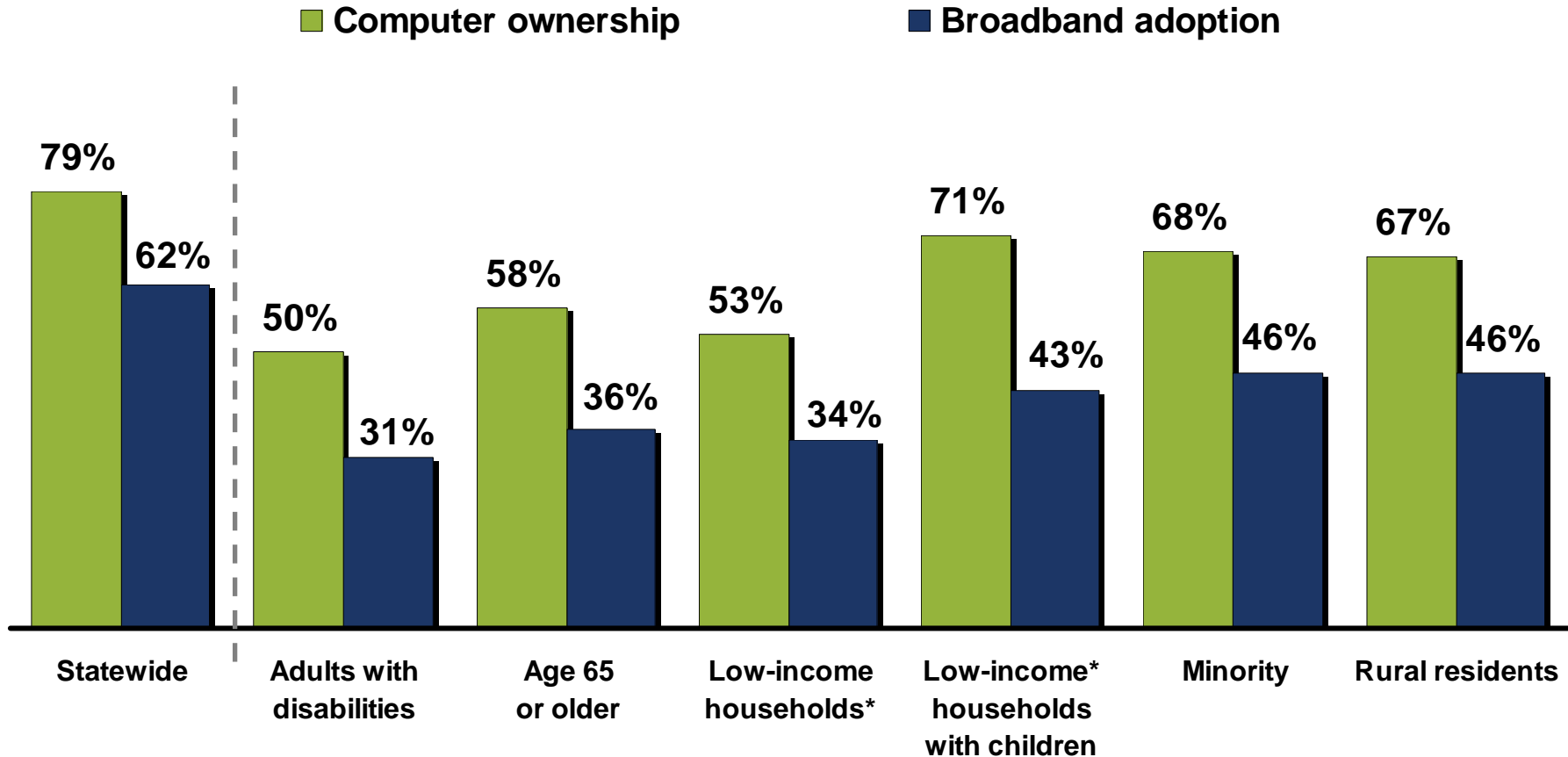
Source: 2010 Connect South Carolina® Residential Technology Assessment
www.connectsc.org



Residential Technology Assessment by Demographic

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

www.connectsc.org



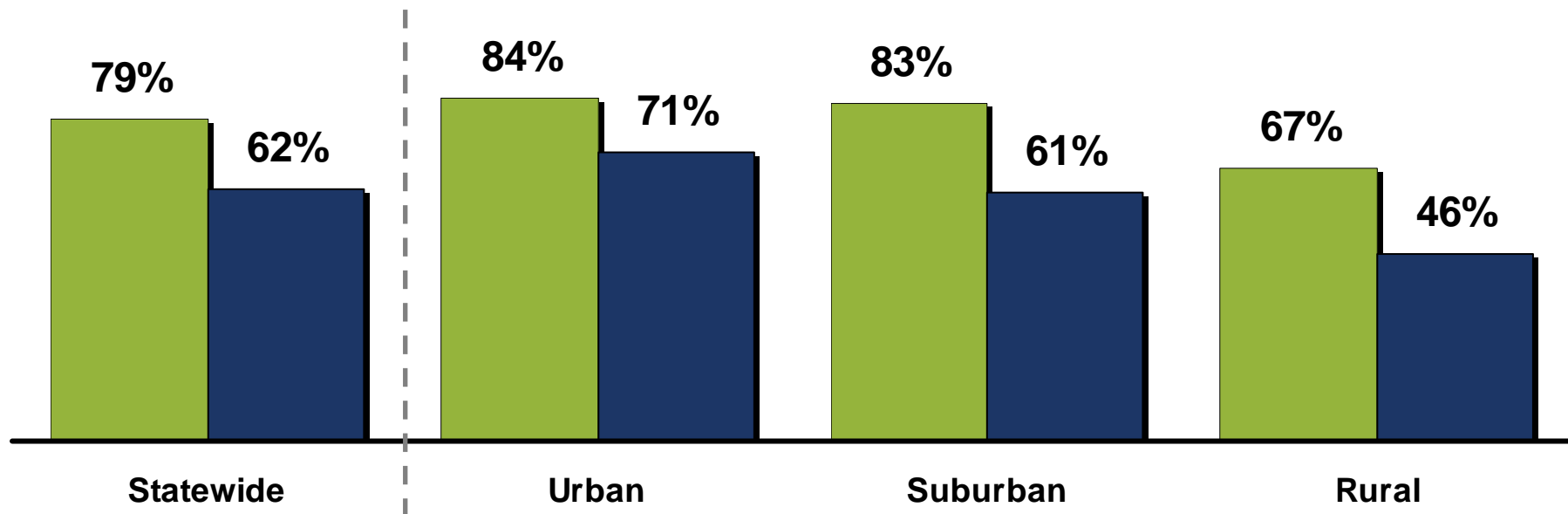
Residential Technology Assessment by Urban-Rural Classification

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)

Source: 2010 Connect South Carolina®
Residential Technology Assessment
www.connectsc.org

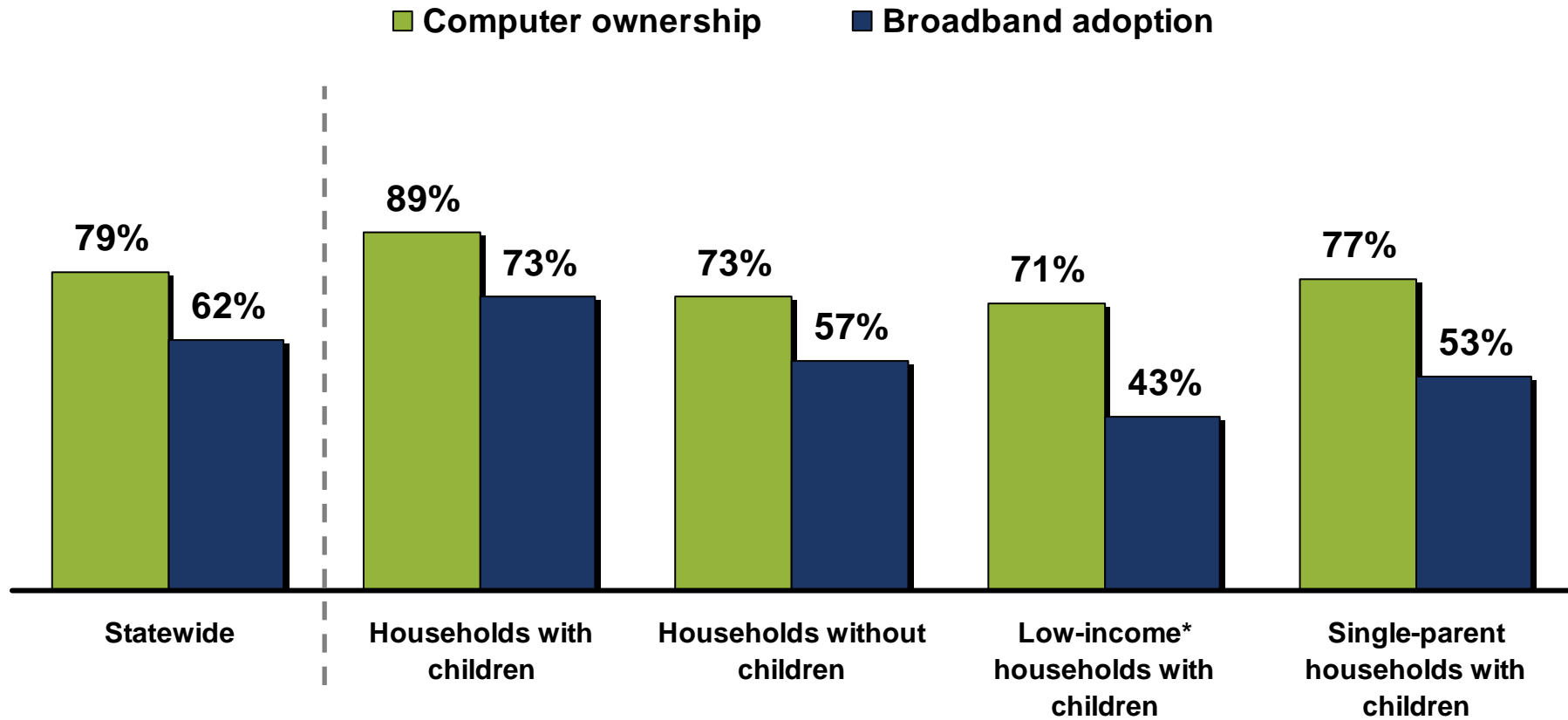


Residential Technology Assessment of Households With Children

www.connectsc.org



Technology Adoption Among Households with Children



*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

www.connectsc.org

Summary of Key Findings



Key Findings: 2010

2010 Key Technology Benchmarks:

- Households with broadband service: 62%
- Households with a computer: 79%
- Residents who access the Internet from home or some other place: 84%
- Residents who subscribe to mobile broadband via laptop or cell phone/mobile device: 29%

Other Key Findings:

- Across South Carolina, 62% of all residents subscribe to home broadband service; by comparison, national surveys show that 67% of American households subscribe to home broadband service.
- Statewide, 79% of all residents own a home computer. This translates into approximately 701,000 adults without a home computer, with 62% of those without a computer saying they do not believe they need one.
- Statewide, 7% of South Carolina residents report that broadband is not available where they live, 85% say with certainty that broadband is available, and 8% do not know whether broadband service is available. By comparison, Connect South Carolina's provider-validated Broadband Service Inventory found that 5.3% of households do not have terrestrial fixed broadband service access.
- In rural South Carolina, 11% of residents report that broadband service is not available where they live, 76% say with certainty that broadband is available, and 13% do not know whether broadband service is available where they live. By comparison, Connect South Carolina's provider-validated Broadband Service Inventory reports that 7.2% of rural households do not have terrestrial fixed broadband access.



2010 Key Findings (Continued)

- More than four out of ten South Carolina residents (42%) who do not have home broadband service say it is because they do not need Internet service or don't understand the benefits. Over one-third (35%) say it is because they do not own a computer.
- Broadband adoption among rural residents is significantly lower than their urban or suburban counterparts. In addition, rural Internet users are less likely than average to use several common applications.
- Among rural non-subscribers, the belief that they do not need broadband or the Internet is the top barrier, cited by 45% of rural non-adopters.
- Low-income households with children are significantly less likely than the state average to subscribe to home broadband service, and they are also less likely to have a home computer.
- Statewide, 45% of broadband subscribers report that they have DSL service at home, while 44% report that they subscribe via cable modem. Fixed wireless broadband subscribers account for 5% of broadband adopters, while 4% subscribe to fiber broadband, 3% access via satellite broadband, and 1% subscribe using wireless broadband service.
- Four out of five South Carolina Internet subscribers (80%) also subscribe to other "bundled" services from their Internet service provider. The most popular service to be bundled with home Internet service is home phone service, followed by television and cell phone service.
- On average, South Carolina broadband subscribers pay \$45.26 per month for their home broadband. Among those who do not subscribe to home broadband service, 26% cite cost as a barrier to adoption.



2010 Key Findings (Continued)

- The top applications used by South Carolina Internet users include sending or receiving e-mail, researching and purchasing products or services online, using a search engine, and communicating with friends and family online.
- Seven out of ten South Carolina Internet users (70%) search for health or medical information online, while 37% communicate with their health insurance company and 31% interact with doctors or healthcare professionals online.
- E-government services are utilized by many South Carolina Internet users; 52% report that they search online for information about government services or policies. In addition, 41% conduct online transactions with government offices (such as e-filing taxes or filling out forms), 36% interact with South Carolina state government offices, 26% interact with local government offices, and 24% interact with elected officials or candidates online.
- Many South Carolina Internet users go online for educational purposes. Statewide, 51% conduct research for schoolwork online, 38% interact with teachers online, and 21% take classes online.
- South Carolina residents also use the Internet for work purposes. Among South Carolina Internet users, 51% interact with their co-workers online, 45% go online to search for jobs or employment, and 29% report that they go online to work from home at least occasionally.
- In South Carolina, 15% of employed adults report that they telework. Teleworking could also provide an additional boost to the state's workforce, as one out of six retirees (17%), nearly one-quarter of adults with disabilities (23%), and more than two out of five homemakers (42%) say they would likely telework if empowered to do so.



2010 Residential Technology Assessment

- Broadband Adoption and Usage
- Computer Ownership and Internet Adoption
- Prices Paid by South Carolina Residents for Internet Service
- Online Activities Among South Carolina Internet Users
- Mobile Technology Use
- Teleworking and Working From Home Through an Internet Connection
- Technology Adoption Barriers



2010 Residential Technology Assessment (Continued)

Residential Technology Assessments:

Assessment by Age

Assessment by Annual Household Income

Assessment by Race/Ethnicity

Assessment by Urban-Rural Classification

Assessment by Education

Assessment of Households With Children

Assessment by Employment Status

Research Methodology



Next Steps

Connect South Carolina will:

- Produce a South Carolina Broadband Market Analysis & Recommendations for Broadband Expansion
- Conduct County-Level 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 at 6 month intervals
 - February 18, 2011 – Data Deadline
 - March 1, 2011 – Approval Deadline



Thank You!!



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