

GOLD COUNTRY CONNECT

AGGREGATED BROADBAND DEMAND FOR
SIERRA, NEVADA, PLACER, EL DORADO and
EASTERN ALPINE COUNTIES

Brent Smith
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SURVEY RESULTS

- 984 / 191,218 households; 490 / 12,783 businesses
- 56% female
- 85.2% white
- 80.8% had at least some college
- Most (57.3%) had annual income of at least \$65,000
- 98.7% had landline telephones
- 84% had cell phones
- 87% had personal computers
- 62.2% had satellite TV
- 73% stated Internet access important or very important
- **82.1% had some kind of Internet access**

RESIDENTIAL DEMAND AND PRICE POINTS

- 17.9% without service
- 31.3% Dial-up
- 11.1% Satellite
- **60.2% potential residential market demand**
- 39.8% ISDN, DSL, Cable, fixed wireless
- 70.6% now paying < \$40 / month
- Nearly half state willingness to pay at least \$40 / month

BUSINESS DEMAND AND PRICE POINTS

- Demographics similar to homeowners except
 - More personal computers (94.9% vs.87%)
 - Fewer cell phones (59.2% vs. 84%)
 - Less satellite or cable TV (44.9% vs. 62.2%)
 - Stated Internet access more important (82.3% vs. 73%)
 - Had more Internet access (92.2% vs. 82.1%)
- 7.8% without access
- 13.9% dial-up
- 10.6% satellite
- 1.9% cell phone
- **34.1% potential business market demand**
- 65.9% cable, DSL, fixed wireless, T-1, DS-3, other

OVERALL IMPLICATIONS

- Large potential demand even in rural areas
- Most willing to pay a rate that fits well with most fixed wireless providers



INTERACTIVE WEB TOOLS





Gold Country Broadband Viewer

Gold Country Aggregated Demand

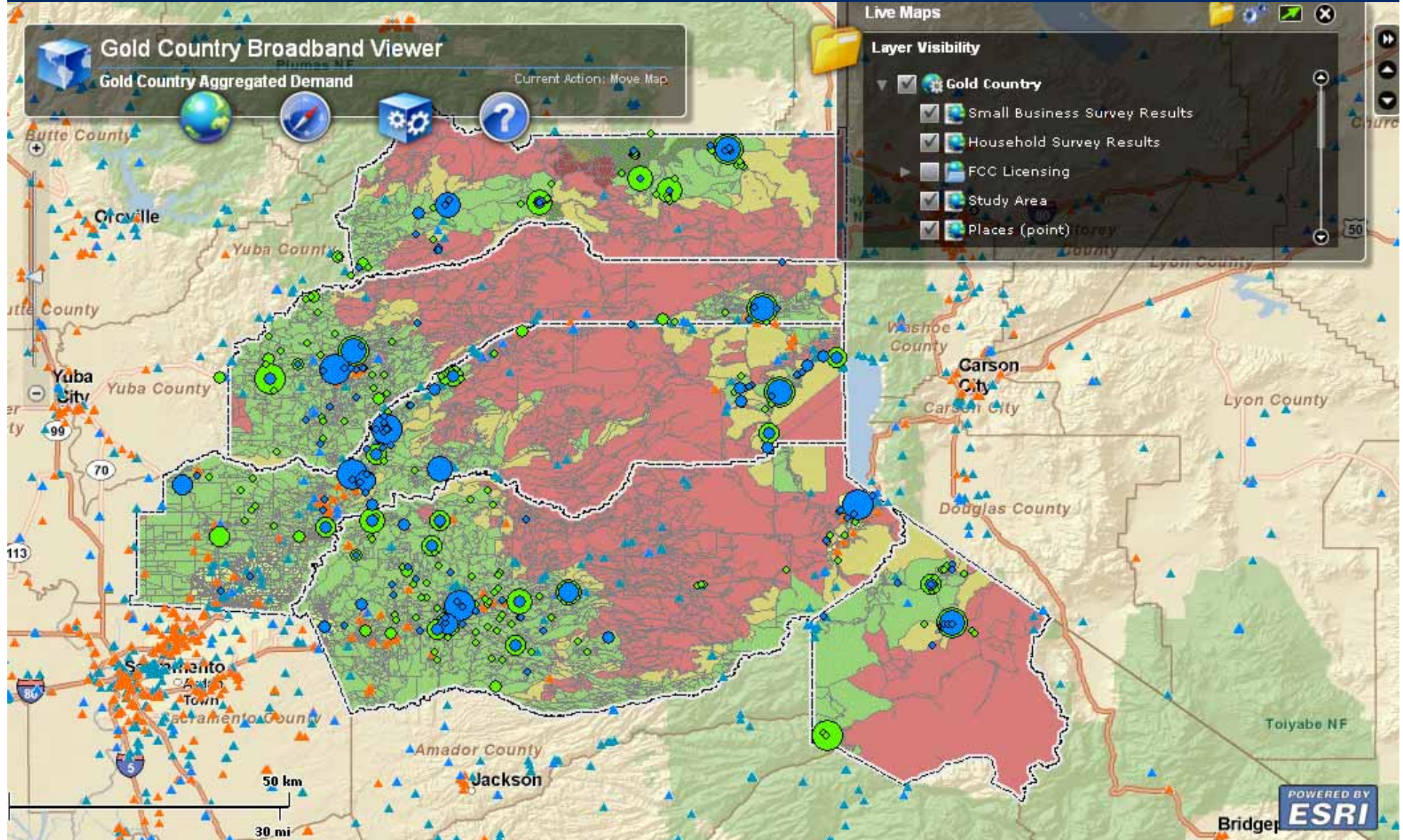
Current Action: Move Map



Live Maps

Layer Visibility

- Gold Country
 - Small Business Survey Results
 - Household Survey Results
 - FCC Licensing
 - Study Area
 - Places (point)



Bridgepoint

LESSONS LEARNED

- Top-down approach worked
- Using Redwood Coast survey worked
- Using a university research facility worked
- Start with development of a providers list
- Broadband providers know other providers
- Invite Broadband providers to community meetings
- Facilitate meetings between providers and planners



CONCLUSIONS & RECOMMENDATIONS

- Even small financial incentives can accelerate service expansion
- Assisting one ISP can accelerate expansion of competitor ISPs
- Daunting terrain will continue to delay service expansion unless different resources are made available
- Local government needs to be more actively engaged
- Educational outreach is needed throughout the region
- Maintain/expand the use of the Chico State mapping tool



ARRA & CASF EXPERIENCE

- 19 members Gold Country Consortium
- 3 CASF applications
- 1 ARRA application



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