

EXECUTIVE SUMMARY

Since 2007, Connected Tennessee has been the “voice of broadband” in the Volunteer State. Offering a neutral perspective on broadband access, adoption, and use, Connected Tennessee has worked closely with communities, providers, government officials, and anchor institutions to accelerate technology in the state.

In 2009, Connected Tennessee, in collaboration with the Tennessee Department of Economic and Community Development (ECD), received a \$2.24 million American Recovery and Reinvestment Act grant from the U.S. Department of Commerce's National Telecommunications and Information Administration's (NTIA) Broadband Technology Opportunities Program (BTOP). BTOP grants supported the deployment of broadband infrastructure, enhanced and expanded public computer centers, and encouraged sustainable adoption of broadband service.

Connected Tennessee served as the state’s designated entity for broadband mapping, research, technical assistance, and local technology planning. The following report summarizes advances made in broadband access, adoption, and use over the past five years, as well as outstanding challenges and opportunities for continued growth to ensure that all Tennessee communities, residents, institutions, and businesses are connected to twenty-first century technology and equipped with the skills and support to utilize it to its fullest.

According to Connected Tennessee’s broadband maps, the state continued strong growth in broadband infrastructure and deployment, as well as increased competition among the higher broadband speed tiers over the last five years. Despite progress, significant connectivity gaps persist in the state – particularly in the state’s rural areas.

While expanding broadband access to these areas is important, without corresponding broadband adoption among Tennessee’s consumers and businesses, further investment and build-out could be deterred. To provide information on the people, businesses, and communities that are taking advantage – and more importantly, not yet taking advantage – of the expansive opportunities provided through broadband, Connected Tennessee conducts annual, statewide residential and business broadband surveys.

In Connected Tennessee’s 2014 Residential Technology Assessment, these surveys revealed that 70% of Tennesseans have adopted broadband at home, and 81% of businesses in the state utilize broadband. Yet, with 1.4 million adults and 25,000 businesses statewide still without broadband, there remains much to do.

Within individual communities, Connected Tennessee facilitates broadband and technology outreach, education, and dissemination through its Connected Community Engagement Program (“Connected”). The Connected program coalesces and trains regional leaders and forms community broadband planning teams to assess the local technology landscape. Each community is then provided a step-by-step action plan to meet their local technology needs. Since 2009, three Tennessee communities have successfully completed local technology assessments and received Technology Action Plans through this program, and six communities are working to finalize assessments. Connected teams are working to address a wide variety of technology-related issues across community sectors. From addressing rural infrastructure gaps, improving the online presence and use of technology among businesses, or

expanding telehealth opportunities at rural institutions, to expanding e-government services, hosting local technology summits, or developing, implementing, and supporting one-to-one device programs and connectivity for schools, the Connected program offers a direct intervention for accelerating the access, adoption, and use of technology across Tennessee.