

Columbia County, Oregon

Broadband Provider Analysis

Prepared By:

Vantage Point Solutions



Table of Contents

Executive Summary3

1. Zip Code Data5

 1.1 County Summary.....5

 1.2 Birkenfeld, Westport, Clatskanie (97016).....8

 1.3 Columbia City (97018)11

 1.4 Rainier (97048)13

 1.5 St. Helens (97051)15

 1.6 Warren (97053)17

 1.7 Deer Island (97054)19

 1.8 Scappoose (97056).....21

 1.9 Vernonia (97064)23

2. Bundled Package Pricing25

 2.1 CenturyLink - Residential25

 2.2 CenturyLink – Business26

 2.3 Comcast – XFINITY (Residential).....26

 2.4 Comcast – Business27

 2.5 Frontier.....27

 2.6 Charter – Spectrum (Residential)28

 2.7 Charter – Spectrum (Business).....28

3. Analysis.....29



Executive Summary

Columbia County awarded Vantage Point Solutions (VPS) a contract through a competitive bid process to conduct a broadband feasibility study. The purpose of the study is to gather data and information and assess options for what Columbia County can do to improve broadband availability and access in the County. The project is broken down into phases with a final report due to the County in March of 2019.

The first phase of this project consists of assessing the current provider landscape in Columbia County to determine availability and gaps in service areas. The following report details the current landscape with respect to the eight internet providers in Columbia County.

Terminology

To ease in the review of this report, the below terminology utilized herein is defined below.

- **Broadband.** The FCC currently defines broadband as internet speeds that reach a minimum of 25Mbps downstream and 3Mbps upstream (25/3). Speeds that fall below 25/3 are not considered to be high-speed broadband but may provide subscribers access to the internet with limitations.
- **Bundled pricing.** This refers to the packages offered by some carriers that offer discounts if you subscribe to more than one offering include voice, data and/or television services.
- **Fixed wireline.** Wireline technologies rely on a physical cable for transmission of the communication signal. These cables usually transport an electrical signal on a copper cable or an optical signal on a fiber optic cable. Fixed wireline cables can be deployed underground or strung on utility poles and will connect directly to the end user.
- **Fixed wireless.** Fixed wireless technologies transmit the communication signal “over the air” on a radio frequency (RF) carrier to the end user.
- **Satellite.** This is a wireless technology wherein the communication signal is transmitted and received by a satellite dish.

Data

To conduct this analysis, VPS divided the County by its eight zip codes (97016, 97018, 97048, 97051, 97053, 97054, 97056, 97064) and specifically reviewed internet access availability for the following locations within those zip codes:

- Birkenfeld
- Westport
- Clatskanie

- Columbia City
- Rainier
- St. Helens
- Warren
- Deer Island
- Scappoose
- Vernonia

VPS collected data directly from each Provider's site, as well as from multiple publicly available sources including BroadbandNow.com, Business.org, and Reviews.org. The data originated from information self-reported by the carriers to third party sites and is generally based on availability in an area rather than by individual addresses. As such, the data will not have pinpoint accuracy and should be used only as an overview. The data for the charts included for each zip code and area in this report includes:

- Provider
- Type of provider
- Coverage %
- Fastest available speed
- Customer rating (as ranked by BroadbandNow.com on a scale of 1-5 with 5 being the highest score)
- Pricing of stand-alone internet service offerings
- Pricing of available bundled package offerings

Maps

VPS also generated maps that have been included as a visual representation of general overview coverage in Columbia County. All data for the maps came from the Federal Communication Commission's (FCC) Fixed Broadband Deployment map which was generated using the last publicly released carrier data (2016). The maps are not to scale and may not represent exact locations or boundaries and town areas.

In addition, please note the following when reviewing the maps:

- Providers may overlap in an area. The change in color is an indication of overlapping competitors. An example of this would be the color purple. This may indicate red and blue coverage areas overlaid.
- These maps represent only the fixed wireline internet providers, and one fixed wireless provider.

No reputable or reliable mapping data for Cascade Networks is currently publicly available. Also, no satellite providers have been included because satellite is theoretically available across Columbia County unless coverage is unavailable due to geological, structural, weather related, or other various factors. For these reasons, the two satellite providers HughesNet and Viasat, have been left off the maps.

1. Zip Code Data

This section of the Report details the information gathered by first providing an overview summary and then by breaking down the data by zip code. Please note that pricing and offerings will vary based on exact geographic location, timing, special offers, and other factors. In addition, simply because a provider is offering service in the County or zip code, it does not mean that every household will be able to subscribe to each carrier or each level of service offered.

Moreover, often times the fastest available speed that is publically stated does not match up with the published marketing pricing sheets which are made available by the companies. In these cases, VPS listed all pricing options below the fastest available speed, and one above, with the caveat that availability is stated to be "up to" that speed and not all customers can experience these speeds.

1.1 County Summary

Overall, there are 8 providers (wireless, wireline and satellite) that offer services in all or parts of Columbia County. These providers are as follows:

- Cascade Networks (fixed wireless)
- CenturyLink (fixed wireline)
- Charter Spectrum (fixed wireline)
- Frontier Communications (fixed wireline)
- HughesNet (satellite)
- Viasat Internet (satellite)
- Xfinity from Comcast (fixed wireline)
- Whiz to Coho (fixed wireless)

As you will see on the following pages, not all service providers are equal and there is a wide-range of speed offerings from less than 1 Mbps to over 250 Mbps.

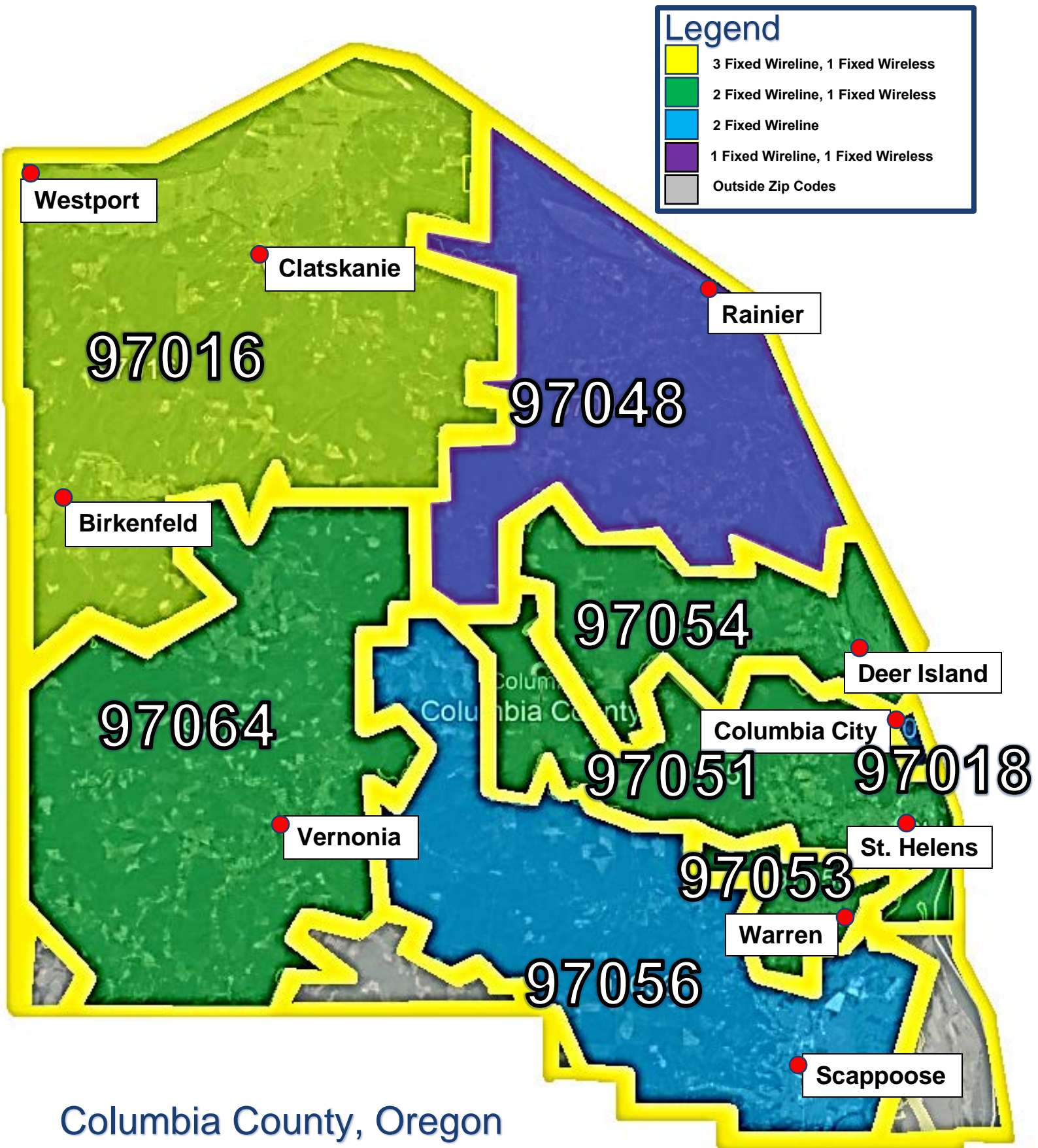
Within this list of providers, there are only two that offer services in all zip codes and they are the two satellite providers - HughesNet and Viasat Internet. In addition, none of the other providers have 100% coverage in any one zip code where they offer services to residents.

With respect to the County-wide providers, the below charts show the services and availability of the offerings of these two carriers. None of the data or maps broken down by zip code will repeat this information. It should be noted that neither satellite provider is currently achieving speeds that meet the federal definition of broadband.

Providers Offering Services in All Zip Codes

Provider	Type	Coverage %	Fastest Available Speed	Customer Rating	Price
Residential & Business					
HughesNet	Satellite	100%	Up to 15 Mbps (10 GB of data)	1.5	\$49.99
			Up to 15 Mbps (20 GB of data)	1.5	\$69.99
Viasat Internet	Satellite	100%	Up to 12 Mbps	2	\$70.00

The map on the next page shows the visual representation of the 8 carriers and their service territory within the County.



Columbia County, Oregon

Broadband Provider Map

1.2 Birkenfeld, Westport, Clatskanie (97016)

This chart provides an overview of the providers in this zip code. As you can see there is only one provider that offers any kind of residential service in more than 50% of the zip code.

Provider	Type	Coverage %	Fastest Available Speed	Customer Rating
Residential				
Cascade Networks	Fixed Wireless	83.3%+	10 Mbps	-
Frontier Communications	DSL	47.9%+	25 Mbps	2
Charter Spectrum	Cable	41.2%+	100 Mbps	3
CenturyLink	DSL	17.9%+	20 Mbps	2
Business				
Cascade Networks	Fixed Wireless	100%	10 Mbps	-
CenturyLink Business	DSL	100%	20 Mbps	2
Frontier Business	DSL and Copper	78.2%+	20 Mbps	2
Charter Spectrum Business	Cable	47.6%+	100 Mbps	3

Pricing Data

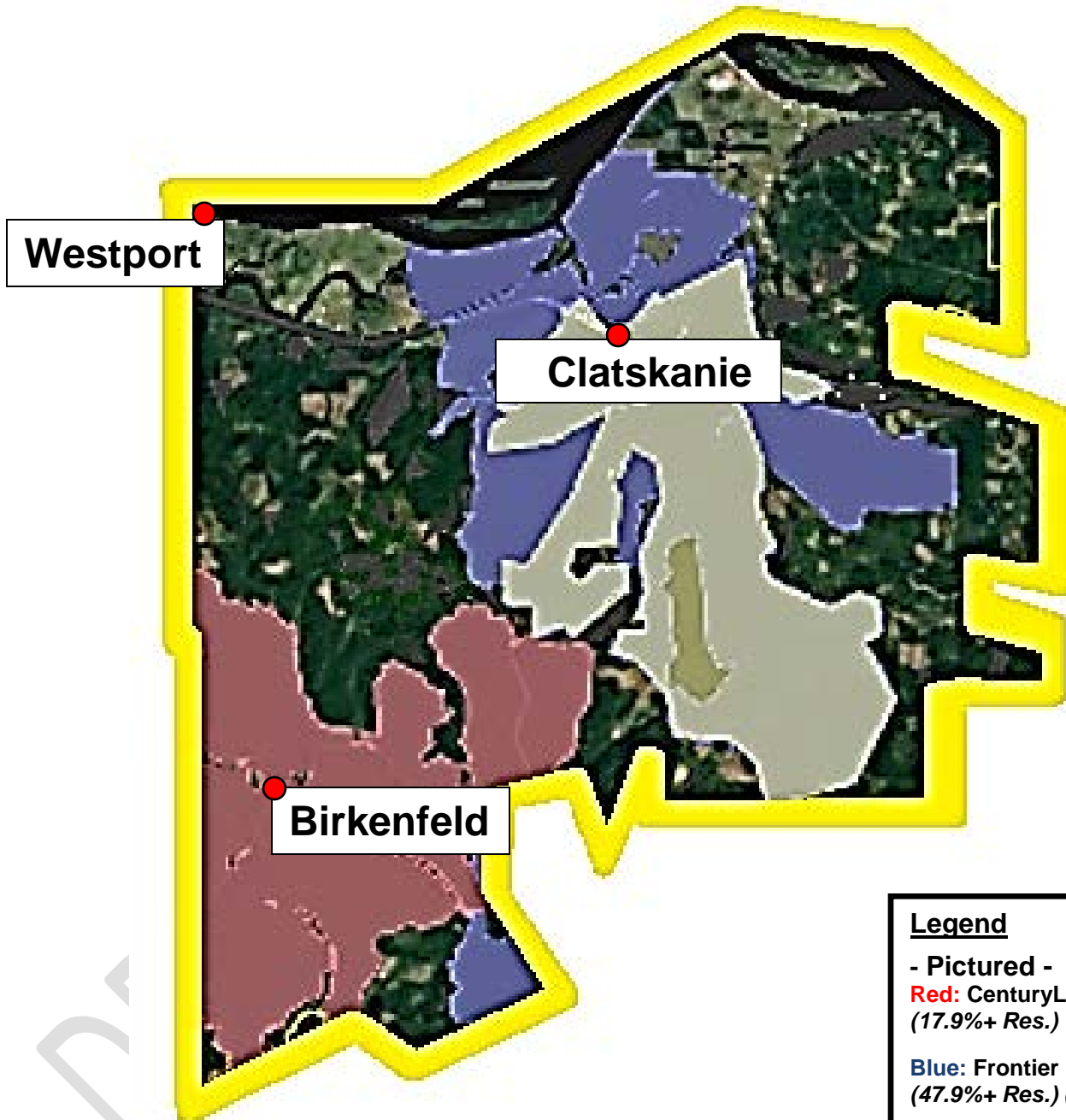
Provider	Speed (Mbps)	Price
Residential		
Cascade Networks	Up to 1.5 Mbps	\$29.00
	Up to 3 Mbps	\$39.00
	Up to 7 Mbps	\$49.00
	Up to 14 Mbps	\$59.00
Frontier Communications	Up to 6 Mbps	\$20.00
	Up to 12 Mbps	\$25.00
	Up to 25 Mbps	\$35.00
Charter Spectrum	Up to 100 Mbps	\$44.99
CenturyLink	Up to 12 Mbps	\$45.00
	Up to 20 Mbps	\$45.00
Business		
Cascade Networks Business	Up to 3 Mbps	\$39.00
	Up to 7 Mbps	\$49.00
	Up to 14 Mbps	\$59.00
CenturyLink Business	Up to 20 Mbps	\$64.99
Frontier Business	Up to 7 Mbps	\$49.99



	Up to 15 Mbps	\$79.99
	Up to 20 Mbps	\$109.99
	Up to 20 Mbps	\$139.99
Charter Spectrum Business	Up to 100 Mbps	\$59.99

The map on the next page shows the visual representation of the providers in this zip code.

97016



Legend

- Pictured -

Red: CenturyLink
(17.9%+ Res.) (100% Bus.)

Blue: Frontier Comm.
(47.9%+ Res.) (78.2%+ Bus.)

Yellow: Charter Comm.
(41.2%+ Res) (47.6%+ Bus.)

- Not Pictured -

Cascade Networks
(83.3%+ Res.) (100% Bus.)

1.3 Columbia City (97018)

This chart provides an overview of the providers in this zip code.

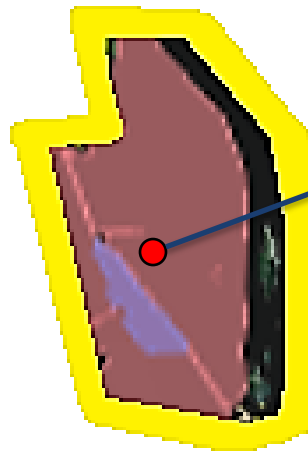
Provider	Type	Coverage %	Fastest Available Speed	Customer Rating
Residential				
Cascade Networks	Fixed Wireless	100%	0.768 Mbps	-
CenturyLink	DSL	99.4%+	100 Mbps	2
XFINITY from Comcast	Cable	96.5%+	250 Mbps	2.5
Business				
Cascade Networks	Fixed Wireless	100%	0.768 Mbps	-
CenturyLink Business	DSL	100%	100 Mbps	2
Comcast Business	Cable	97.4%+	250 Mbps	2.5

Pricing Data

Provider	Speed (Mbps)	Price
Residential		
Cascade Networks	Up to 1.5 Mbps	\$29.00
CenturyLink	Up to 20 Mbps	\$45.00
	Up to 60 Mbps	\$55.00
	Up to 120 Mbps	\$65.00
XFINITY from Comcast	Up to 15 Mbps	\$29.99
	Up to 60 Mbps	\$39.99
	Up to 150 Mbps	\$54.99
	Up to 250 Mbps	\$69.99
Business		
Cascade Networks Business	Up to 3 Mbps	\$39.00
CenturyLink Business	Up to 10 Mbps	\$54.99
	Up to 20 Mbps	\$64.99
	Up to 40 Mbps	\$84.99
	Up to 100 Mbps	\$104.99
Comcast Business	Up to 25 Mbps	\$69.95
	Up to 75 Mbps	\$99.95
	Up to 150 Mbps	\$139.95
	Up to 300 Mbps	\$199.95

The map on the next page shows the visual representation of the providers in this zip code.

97018



Columbia City

Legend

- Pictured -

Red: CenturyLink
(99.4%+ Res.) (100% Bus.)

Blue: Comcast
(96.5%+ Res.) (97.4%+ Bus.)

- Not Pictured -
Cascade Networks
(100% Res.) (100% Bus.)

1.4 Rainier (97048)

This chart provides an overview of the providers in this zip code.

Provider	Type	Coverage %	Fastest Available Speed	Customer Rating
Residential				
Cascade Networks	Fixed Wireless	97.4%+	10 Mbps	-
CenturyLink	DSL	92.3%+	20 Mbps	2
Business				
Cascade Networks	Fixed Wireless	100%	10 Mbps	-
CenturyLink Business	DSL	100%	20 Mbps	2

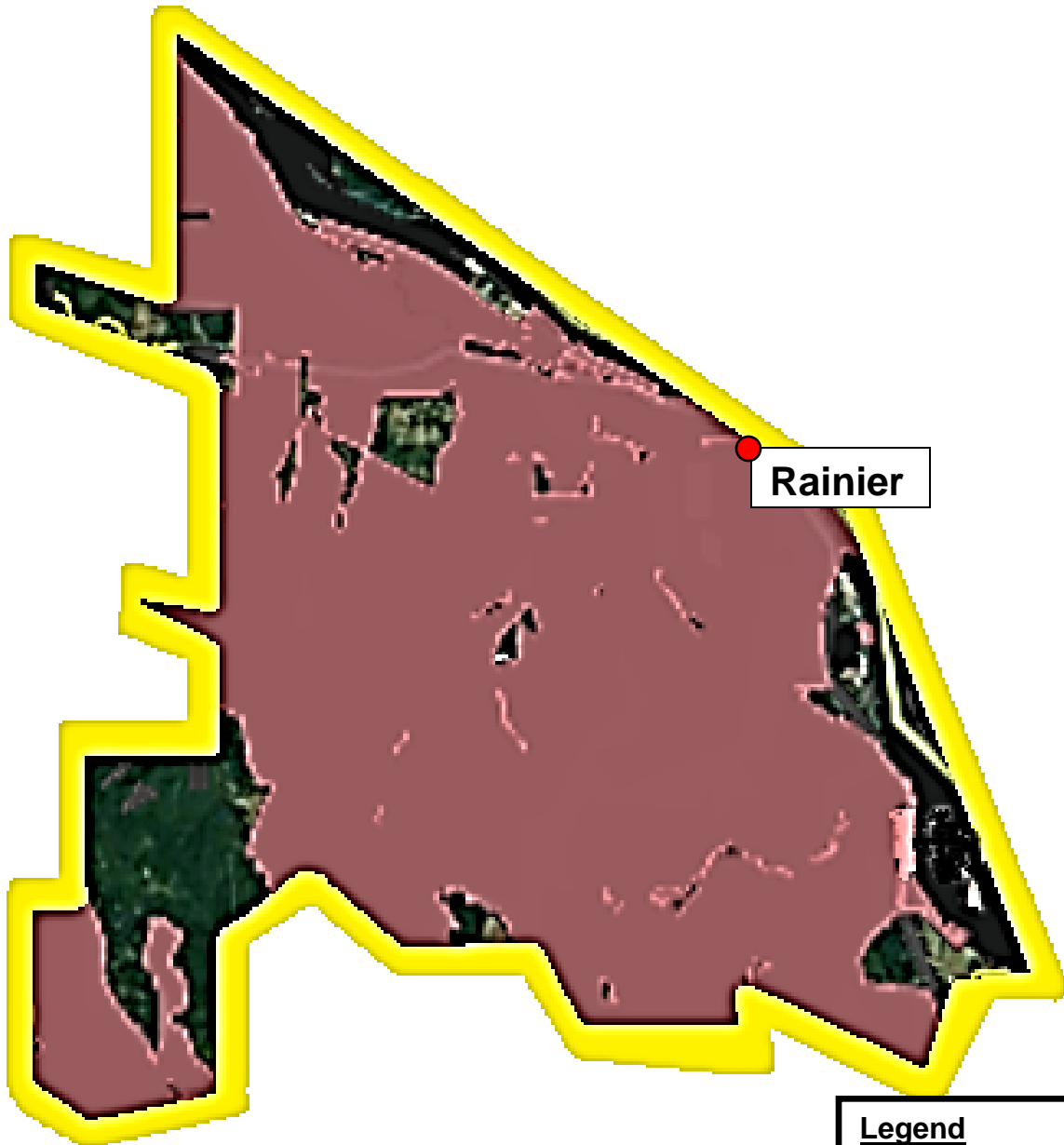
According to Comcast's website, it says that Comcast is offering service to the area. However, VPS could not find any corroborating data from the FCC or BroadbandNow.com. As a result, VPS could not verify the fastest speed available and the percentage of the coverage area and so we did include them in the chart.

Pricing Data

Provider	Speed (Mbps)	Price
Residential		
Cascade Networks	Up to 1.5 Mbps	\$29.00
	Up to 3 Mbps	\$39.00
	Up to 7 Mbps	\$49.00
	Up to 14 Mbps	\$59.00
CenturyLink	Up to 12 Mbps	\$45.00
	Up to 20 Mbps	\$45.00
Business		
Cascade Networks Business	Up to 3 Mbps	\$39.00
	Up to 7 Mbps	\$49.00
	Up to 14 Mbps	\$59.00
CenturyLink Business	Up to 10 Mbps	\$54.99
	Up to 20 Mbps	\$64.99

The map on the next page shows the visual representation of the providers in this zip code.

97048



Legend

- Pictured -

Red: CenturyLink
(92.3%+ Res.) (100% Bus.)

- Not Pictured -

Cascade Networks
(97.4%+ Res.) (100% Bus.)

1.5 St. Helens (97051)

This chart provides an overview of the providers in this zip code.

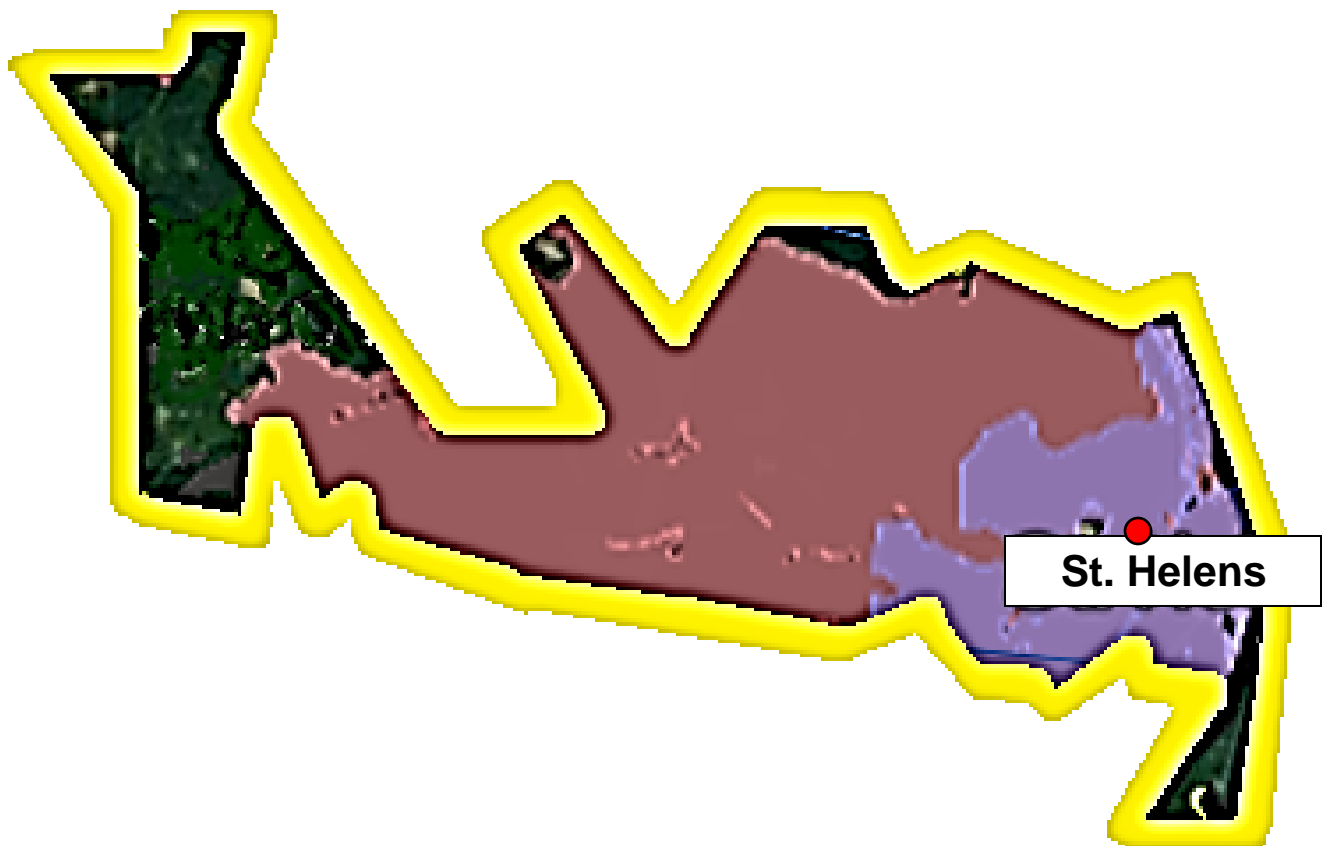
Provider	Type	Coverage %	Fastest Available Speed	Customer Rating
Residential				
Cascade Networks	Fixed Wireless	99.6%+	0.768 Mbps	-
CenturyLink	DSL	98.8%+	20 Mbps	2
XFINITY from Comcast	Cable	91.9%+	250 Mbps	2.5
Business				
CenturyLink Business	DSL	100%	20 Mbps	2
Cascade Networks	Fixed Wireless	96.3%+	0.768 Mbps	-
Comcast Business	Cable	27.8%+	250 Mbps	2.5

Pricing Data

Provider	Speed (Mbps)	Price
Residential		
Cascade Networks	Up to 1.5 Mbps	\$29.00
CenturyLink	Up to 12 Mbps	\$45.00
	Up to 20 Mbps	\$45.00
XFINITY from Comcast	Up to 15 Mbps	\$29.99
	Up to 60 Mbps	\$39.99
	Up to 150 Mbps	\$54.99
	Up to 250 Mbps	\$69.99
Business		
CenturyLink Business	Up to 10 Mbps	\$54.99
	Up to 20 Mbps	\$64.99
Cascade Networks Business	Up to 3 Mbps	\$39.00
Comcast Business	Up to 25 Mbps	\$69.95
	Up to 75 Mbps	\$99.95
	Up to 150 Mbps	\$139.95
	Up to 300 Mbps	\$199.95

The map on the next page shows the visual representation of the providers in this zip code.

97051



Legend

- Pictured -

Red: CenturyLink
(98.8%+ Res.) (100% Bus.)

Blue: Comcast
(91.9%+ Res.) (27.8%+ Bus.)

- Not Pictured -
Cascade Networks
(99.6%+ Res.) (96.3%+ Bus.)

1.6 Warren (97053)

This chart provides an overview of the providers in this zip code.

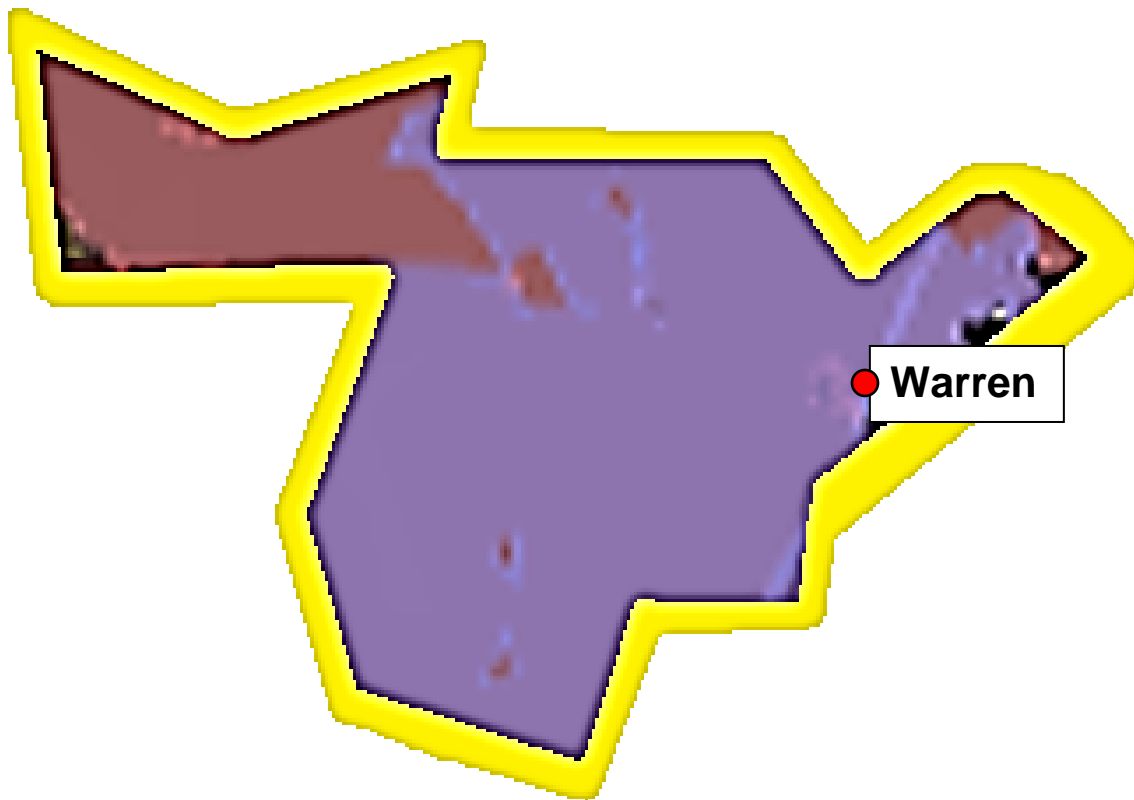
Provider	Type	Coverage %	Fastest Available Speed	Customer Rating
Residential				
CenturyLink	DSL	99.7%+	40 Mbps	2
XFINITY from Comcast	Cable	96.9%+	250 Mbps	2.5
Cascade Networks	Fixed Wireless	10.6%+	0.768 Mbps	-
Business				
CenturyLink Business	DSL	100%	40 Mbps	2
Comcast Business	Cable	86.6%+	250 Mbps	2.5
Cascade Networks	Fixed Wireless	7.3%+	0.768 Mbps	-

Pricing Data

Provider	Speed (Mbps)	Price
Residential		
CenturyLink	Up to 20 Mbps	\$45.00
	Up to 40 Mbps	\$55.00
XFINITY from Comcast	Up to 15 Mbps	\$29.99
	Up to 60 Mbps	\$39.99
	Up to 150 Mbps	\$54.99
	Up to 250 Mbps	\$69.99
Cascade Networks	Up to 1.5 Mbps	\$29.00
Business		
CenturyLink Business	Up to 10 Mbps	\$54.99
	Up to 20 Mbps	\$64.99
	Up to 40 Mbps	\$84.99
Comcast Business	Up to 25 Mbps	\$69.95
	Up to 75 Mbps	\$99.95
	Up to 150 Mbps	\$139.95
	Up to 300 Mbps	\$199.95
Cascade Networks Business	Up to 3 Mbps	\$39.00

The map on the next page shows the visual representation of the providers in this zip code.

97053



Legend

- Pictured -

Red: CenturyLink
(99.7%+ Res.) (100% Bus.)

Blue: Comcast
(96.9%+ Res.) (86.6%+ Bus.)

- Not Pictured -
Cascade Networks
(10.6%+ Res.) (7.3%+ Bus.)

1.7 Deer Island (97054)

This chart provides an overview of the providers in this zip code.

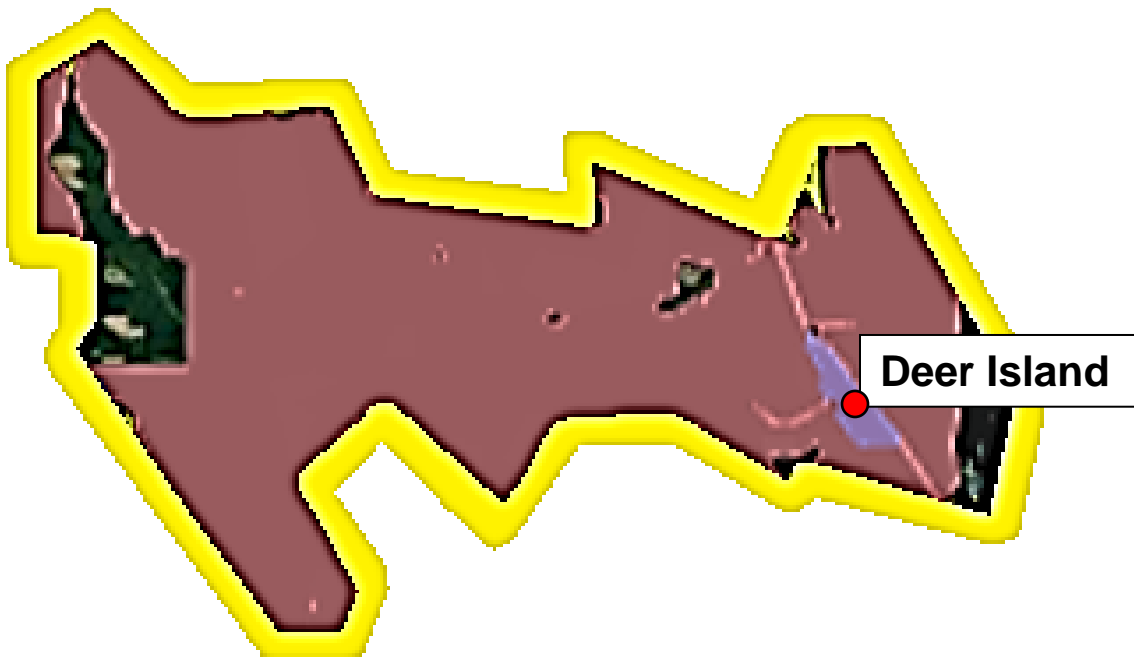
Provider	Type	Coverage %	Fastest Available Speed	Customer Rating
Residential				
CenturyLink	DSL	97.7%+	10 Mbps	2
Cascade Networks	Fixed Wireless	76.3%+	0.768 Mbps	-
XFINITY from Comcast	Cable	18.9%+	250 Mbps	2.5
Business				
CenturyLink Business	DSL	100%	10 Mbps	2
Cascade Networks	Fixed Wireless	69.0%+	0.768 Mbps	-
Comcast Business	Cable	4.5%+	250 Mbps	2.5

Pricing Data

Provider	Speed (Mbps)	Price
Residential		
CenturyLink	Up to 5 Mbps	\$45.00
	Up to 10 Mbps	\$45.00
Cascade Networks	Up to 1.5 Mbps	\$29.00
XFINITY from Comcast	Up to 15 Mbps	\$29.99
	Up to 60 Mbps	\$39.99
	Up to 150 Mbps	\$54.99
	Up to 250 Mbps	\$69.99
Business		
CenturyLink Business	Up to 10 Mbps	\$54.99
Cascade Networks Business	Up to 3 Mbps	\$39.00
Comcast Business	Up to 25 Mbps	\$69.95
	Up to 75 Mbps	\$99.95
	Up to 150 Mbps	\$139.95
	Up to 300 Mbps	\$199.95

The map on the next page shows the visual representation of the providers in this zip code.

97054



Legend

- Pictured -

Red: CenturyLink
(97.7%+ Res.) (100% Bus.)

Blue: Comcast
(18.9%+ Res.) (4.5%+ Bus.)

- Not Pictured -

Cascade Networks
(76.3%+ Res.) (69%+ Bus.)

1.8 Scappoose (97056)

This chart provides an overview of the providers in this zip code.

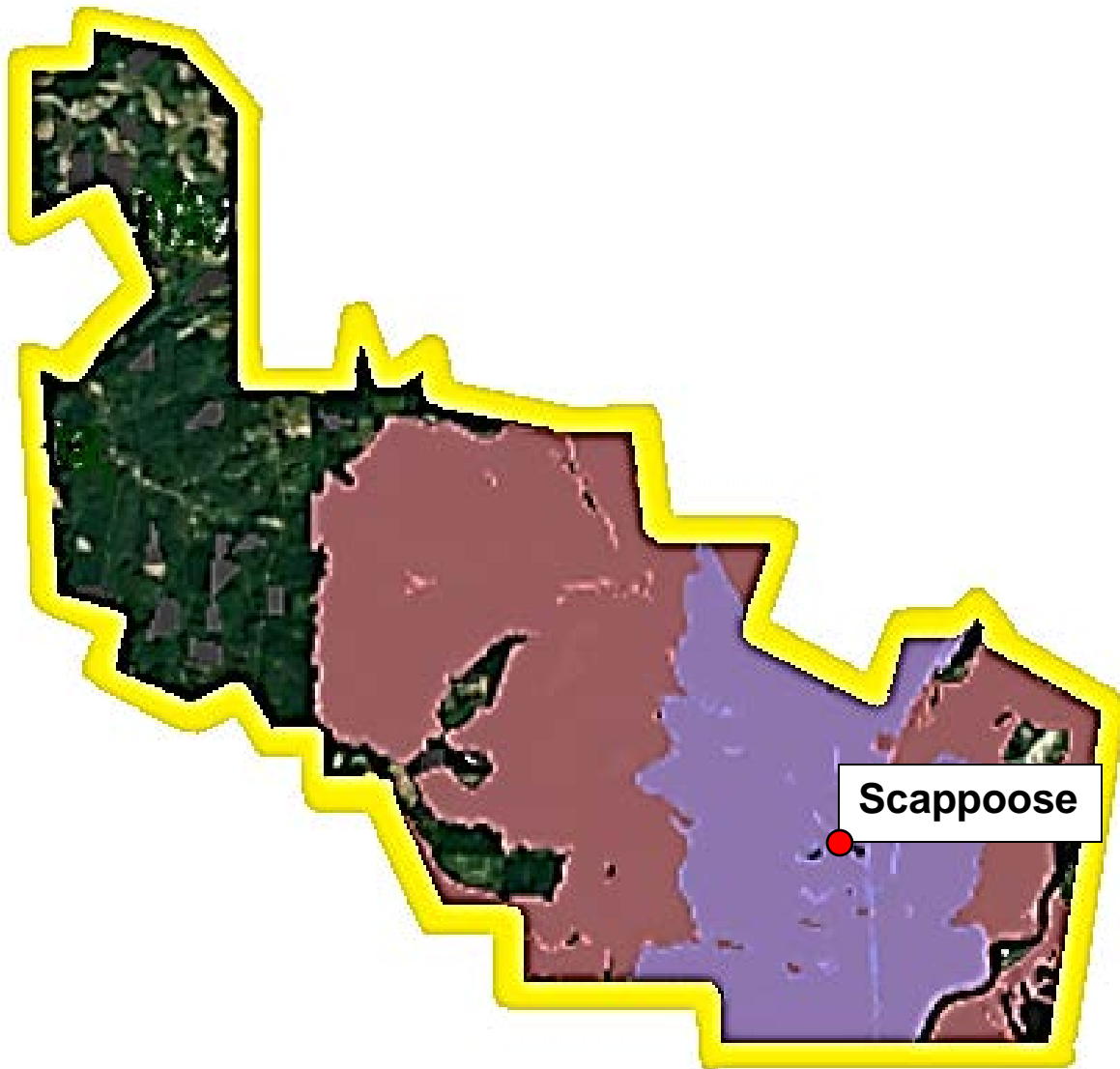
Provider	Type	Coverage %	Fastest Available Speed	Customer Rating
Residential				
CenturyLink	DSL	98.6%+	10 Mbps	2
XFINITY from Comcast	Cable	86.2%+	250 Mbps	2.5
Business				
CenturyLink Business	DSL	100%	10 Mbps	2
Comcast Business	Cable	35.8%+	250 Mbps	2.5

Pricing Data

Provider	Speed (Mbps)	Price
Residential		
CenturyLink	Up to 10 Mbps	\$45.00
XFINITY from Comcast	Up to 15 Mbps	\$29.99
	Up to 60 Mbps	\$39.99
	Up to 150 Mbps	\$54.99
	Up to 250 Mbps	\$69.99
Business		
CenturyLink Business	Up to 10 Mbps	\$54.99
Comcast Business	Up to 25 Mbps	\$69.95
	Up to 75 Mbps	\$99.95
	Up to 150 Mbps	\$139.95
	Up to 300 Mbps	\$199.95

The map on the next page shows the visual representation of the providers in this zip code.

97056



Legend

- Pictured -

Red: CenturyLink
(98.6%+ Res.) (100% Bus.)

Blue: Comcast
(86.2%+ Res.) (35.8%+ Bus.)

1.9 Vernonia (97064)

This chart provides an overview of the providers in this zip code.

97064	Vernonia		Columbia	
Provider	Type	Coverage %	Fastest Available Speed	Customer Rating
Residential				
Whiz to Coho	Fixed Wireless	98.3%+	7 Mbps	3.5
Frontier Communications	DSL	90.8%+	25 Mbps	2
CenturyLink	DSL	2.4%+	1.5 Mbps	2
Business				
Frontier Business	DSL	100%	25 Mbps	2
CenturyLink Business	DSL	13.0%+	1.5 Mbps	2

Pricing Data

Provider	Speed (Mbps)	Price
Residential		
Whiz to Coho	Up to 3 Mbps - 50 GB	\$39.95
	Up to 5 Mbps - 100 GB	\$69.95
	Up to 7 Mbps - 150 GB	\$99.95
	Up to 7 Mbps - 200 GB	\$129.95
Frontier Communications	Up to 6 Mbps	\$20.00
	Up to 12 Mbps	\$25.00
	Up to 25 Mbps	\$35.00
CenturyLink	Up to 10 Mbps	\$45.00
Business		
Frontier Business	Up to 7 Mbps	\$49.99
	Up to 15 Mbps	\$79.99
	Up to 20 Mbps	\$109.99
	Up to 40 Mbps	\$139.99
CenturyLink Business	Up to 10 Mbps	\$54.99

The map on the next page shows the visual representation of the providers in this zip code.

97064



Legend

- Pictured -

Red: CenturyLink
(2.4%+ Res.) (13%+ Bus.)

Blue: Frontier Comm.
(90.8%+ Res.) (100% Bus.)

Yellow: Whiz to Coho
(98.3%+ Res.)

2. Bundled Package Pricing

Bundled packages are discounted pricing options for subscribers that purchase more than one service. In Columbia County there are 4 fixed wireline providers that offer bundled package pricing options. This pricing is generally what is available within each provider's service area within Columbia County. These packages are not broken down by zip code and do not change any of the coverage or speed information detailed in the previous section. The packages are as follows:

2.1 CenturyLink - Residential

Internet			
Service		Price	Description
20 Mbps	Base Rate	\$45.00	--
40 Mbps	Base Rate	\$55.00	--
80 Mbps	Base Rate	\$55.00	--
Phone			
Phone	*Add an Additional	\$20.00	--
Phone	*Add an Additional	\$40.00	Unlimited Nationwide Long Distance
Television - DirectTV			
Television	*Add an Additional	\$35.00	155+ Channels
Television	*Add an Additional	\$40.00	160+ Channels
Television	*Add an Additional	\$45.00	185+ Channels
Television	*Add an Additional	\$50.00	235+ Channels
Television	*Add an Additional	\$55.00	250+ Channels

Total pricing doubles after first year.

2.2 CenturyLink – Business

Internet - Phone		
Broadband Speed	Price	Add-Ons
Up to 20 Mbps	\$74.99	Cloud Storage
Up to 40 Mbps	\$84.99	Hosted Applications
Up to 100 Mbps	\$174.99	Optimal for Frequent Data Backup

2.3 Comcast – XFINITY (Residential)

Internet - TV			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 60 Mbps	10+	\$44.99	-
Up to 60 Mbps	10+	\$44.99	HD & Cloud DVR
Up to 60 Mbps	130+	\$44.99	60+ Spanish-Language Channels
Up to 150 Mbps	10+	\$59.99	-
Up to 150 Mbps	10+	\$74.99	HD & Cloud DVR
Up to 150 Mbps	140+	\$79.99	-
Up to 150 Mbps	200+	\$79.99	60 Spanish-Language Channels
Up to 150 Mbps	140+	\$99.99	Speed Good for 11 Devices
Up to 150 Mbps	220+	\$114.99	+ Starz & Speeds Good for up to 11 Devices
Up to 150 Mbps	260+	\$134.99	+ Movie Channels & X1 DVR & 11 Devices
Up to 250 Mbps	10+	\$74.99	-
Up to 250 Mbps	10+	\$89.99	+ Streaming and Cloud DVR
Up to 250 Mbps	140+	\$109.99	Speed Good for 12+ Devices



Up to 250 Mbps	260+	\$134.99	+ Movie Channels & X1 DVR
Internet - TV - Phone			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 150 Mbps	140+	\$89.99	Best Call Clarity
Up to 250 Mbps	140+	\$119.99	-
Up to 400 Mbps	220+	\$139.99	+ Starz
Up to 400 Mbps	260+	\$159.99	+ Movie Channels & X1 DVR
Internet - TV - Phone - Home Security			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 1000 Mbps	260+	\$189.99	+ Movie Channels & 24/7 Security Monitoring

2.4 Comcast – Business

Internet - Phone			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 25 Mbps	-	\$84.90	Desk Phone to Mobile Connectivity
Up to 75 Mbps	-	\$114.90	Desk Phone to Mobile Connectivity
Up to 150 Mbps	-	\$154.90	Desk Phone to Mobile Connectivity
Internet - TV - Phone			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 25 Mbps	45+	\$104.85	35+ Advanced Calling Features
Up to 75 Mbps	45+	\$134.85	35+ Advanced Calling Features

2.5 Frontier

Internet - Phone			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 6 Mbps	-	\$32.00	Unlimited Nationwide Calling
Up to 12 Mbps	-	\$32.00	Unlimited Nationwide Calling
Internet - TV - Phone			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 6 Mbps	250+	\$101.99	Unlimited Nationwide Calling



Up to 12 Mbps	250+	\$101.99	Unlimited Nationwide Calling
---------------	------	----------	------------------------------

2.6 Charter – Spectrum (Residential)

Internet - TV			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 100 Mbps	125+	\$89.98	Thousands of OnDemand choices
Internet - Phone			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 100 Mbps	-	\$59.98	Unlimited Nationwide Calling
Internet - TV - Phone			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 100 Mbps	125+	\$89.97	Unlimited Nationwide Calling
Up to 100 Mbps	175+	\$109.97	Unlimited Nationwide Calling
Up to 100 Mbps	200+	\$129.97	Unlimited Nationwide Calling

2.7 Charter – Spectrum (Business)

Internet - Phone			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 100 Mbps	-	\$74.98	Free Modem
Up to 300 Mbps	-	\$119.98	Free Email, Domain, Backup, Public WiFi
Internet - TV - Phone			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 100 Mbps	40+	\$99.97	30 Advanced Business Calling Features

**Below is special pricing for Restaurant establishments offered by Charter.*

Internet - TV - Phone			
Broadband Speed	Channel Offering	Price	Add-Ons
Up to 100 Mbps	45+	\$89.97	Free HD Channels
Up to 100 Mbps	80+	\$109.97	Free HD Channels
Up to 100 Mbps	140+	\$169.97	Free HD Channels

3. Analysis

This data is meant to provide an overview of the general competitive landscape in Columbia County. It is critical to keep in mind when reviewing this data that the estimated percentage of zip codes where 25Mbps is available is based on self-reporting by the providers and not an accurate reflection of the address level data. VPS will be conducting a residential and a business survey as a part of the next phase of the broadband feasibility study and will obtain additional information that will aid in refining the coverage summary.

Overall, the coverage across Columbia County is inconsistent. There are two zip codes (97053 and 97018) that appear to have approximately 99% coverage with multiple providers offering residential services with speeds that meet or exceed the federal definition of broadband. However, it should be noted that with respect to the top two zip codes, this is a departure for Century Link which only offers speeds of between 10 – 20Mbps in all the other zip codes. As such, this data could be inaccurate.

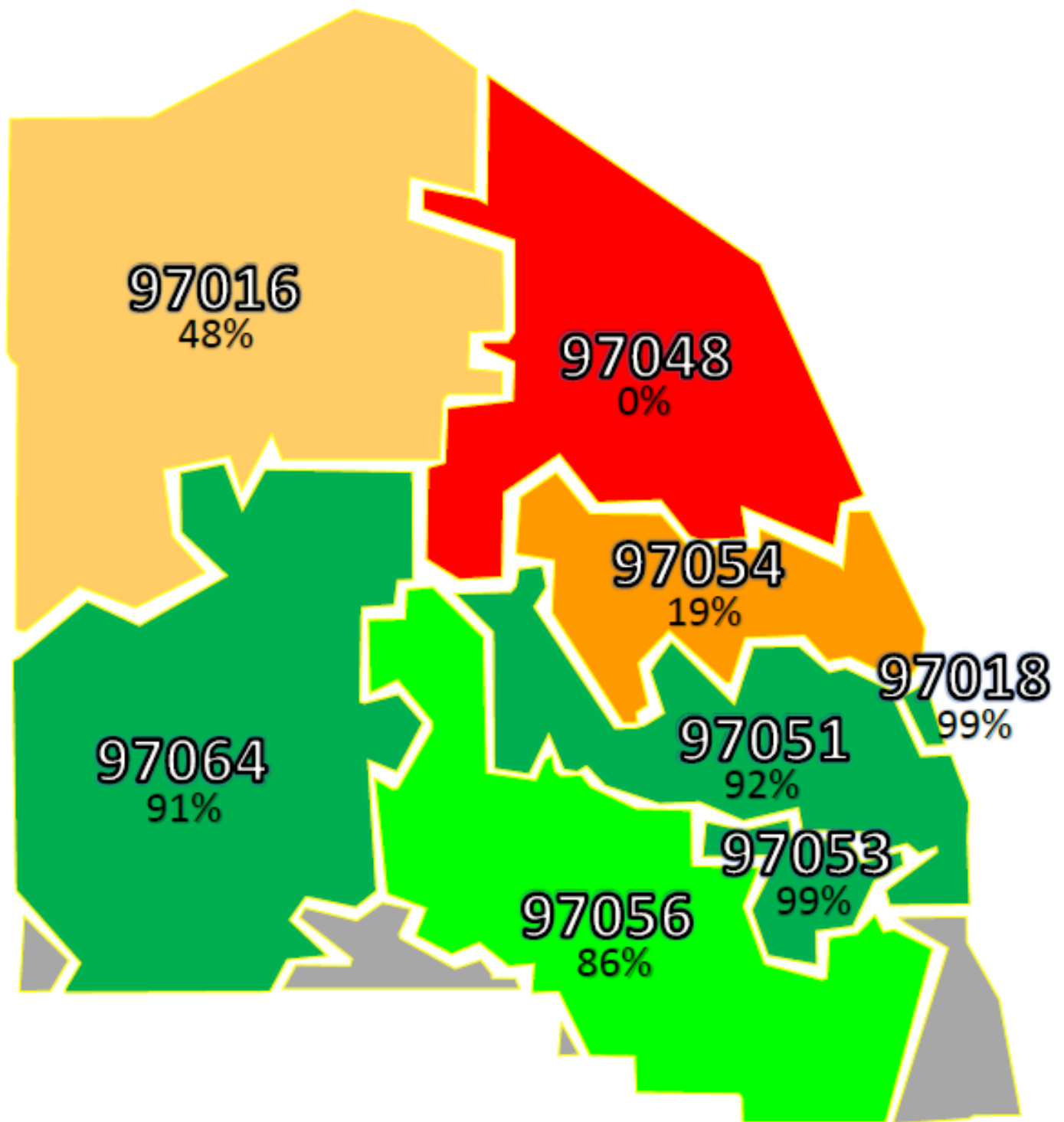
The below chart provides a summary of the zip codes showing those providers that are meeting the 25Mbps standard.

Zip Code	# of Providers (including satellite)	Providers offering 10 Mbps	Providers offering 25 Mbps	Est. % of zip code where 25 Mbps is available
97053	5	4	Comcast, Century Link	97% - 99%
97018	5	4	Comcast, CenturyLink	96% - 99%
97051	5	4	Comcast	92%
97064	5	3	Frontier	91%
97056	4	4	Comcast	86%
97016	6	6	Frontier, Charter	41% - 48%
97054	5	4	Comcast	19%
97048	4	4	0	0

As you can see, the number of providers drops significantly when you apply the 25Mbps standard. Only three of the eight zip codes have two providers offering broadband service with the rest limited to one. With the two satellite providers, it is theoretically possible to subscribe to 10Mbps of service throughout the County.

When placing this data on a map (provided on the next page), it becomes clear that there is a geographic problem with broadband coverage in Columbia County. The southwest and southeast portions of the County are the best-served. The northwest portion has partial coverage and the areas in the northeast have virtually no access to high-speed broadband.

The data to be collected from the surveys as well as the other feasibility tasks will assist in refining the overview information contained in this report.



Broadband Speed Coverage of 25 Mbps or Greater