Policies for Boosting Broadband Demand
ITIF
November 5, 2009
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Connected Nation
What works?

• Program development based on a holistic understanding of barriers to computer and Internet use, across demographics, at both the macro and micro levels

• Research-based programs that target specific populations for specific reasons with specific tactics

• Local ownership and leadership
Among Tennessee residents with no Internet connection at home:

- I don’t own a computer: 44%
- I don’t need the Internet, or don’t know why I don't subscribe: 37%
- Internet service is too expensive: 19%
- I access the Internet somewhere else: 10%
- Broadband isn't available in your area: 7%
- Concerns about fraud or identity theft: 3%
- Other: 3%

Q: Why don’t you subscribe to the Internet at home? (n=256 TN residents with no Internet service in their household)

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

Source: July 2009 Connected Tennessee Residential Technology Assessment

Nearly one-half of Tennessee residents who don’t have home Internet service say it is because they don’t own a computer. More than one-third say it is because they don’t need Internet service or don’t understand the benefits.
Barriers to Broadband Adoption

Among Tennessee residents with no home broadband service*

I don't need the broadband, or don't know why I don't subscribe 37%
I don't have a computer 28%
Broadband is too expensive 20%
Broadband is not available in my area 17%
I can get broadband access somewhere else 8%
Concerns about fraud or identity theft 2%
Available broadband service is not fast enough 1%

Q: Why don't you subscribe to broadband at home? (n=550 TN residents that do not have home broadband service)
*Percentages do not add up to 100% because individuals could give multiple responses.

Source: July 2009 Connected Tennessee® Residential Technology Assessment
www.connectedtennessee.org
Among Tennessee residents who do not own a home computer*

- I don't need a computer, or don't know why I need one: 60%
- Too expensive: 24%
- I use a computer someplace else: 12%
- Other: 10%

Q: Why don’t you have a computer at home? (n=294 TN residents with no home computer)
*Percentages do not add up to 100% because individuals could give multiple responses.

Three out of five Tennessee residents who don’t own a computer believe they don’t need one.

Source: July 2009 Connected Tennessee Residential Technology Assessment
www.connectedtennessee.org
Top Barriers to Broadband Adoption

Percent of Tennessee residents without home broadband service

- Don't need broadband
- No computer
- Broadband is too expensive
- Broadband is not available in my area

Q: Why don’t you subscribe to broadband at home? (n=550 TN Internet subscribers who do not subscribe to broadband)

Source: July 2009 Connected Tennessee® Residential Technology Assessment
www.connectedtennessee.org

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Tennessee Residents With a Computer at Home

Trends in computer ownership since the inception of Connected Tennessee®

Q: Does your household have a computer? (n=9,513 TN residents in 2007 and n=1,200 TN residents in 2009)

Source: July 2007 and July 2009 Connected Tennessee® Residential Technology Assessments

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Tennessee Residents With Home Broadband Service

Trends in broadband adoption since the inception of Connected Tennessee®

Q: Which of the following describe the type of Internet service you have at home?
(n=9,513 TN residents in 2007 and n=1,200 TN residents in 2009)

Source: July 2007 and July 2009 Connected Tennessee® Residential Technology Assessments
Tennessee Residents Who Access the Internet
(At Home or Someplace Else)

Trends in Internet adoption since the inception of Connected Tennessee®

Q: At what locations do you use the Internet?
(n=9,513 TN residents in 2007 and n=1,200 TN residents in 2009)

Source: July 2007 and July 2009 Connected Tennessee® Residential Technology Assessments
www.connectedtennessee.org

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Kentucky counties participating in No Child Left Offline include Johnson, Clay, Wolfe, McCreary, Owsley, Carter, Lawrence and Morgan Counties. Low-income families are households where children are present and the annual household income is less than $25,000. n=924 low-income households with children in 2007 and 944 low-income households with children in 2005.

Source: 2005 and 2007 ConnectKentucky Residential Technology Assessments

www.connectednation.org
Internet Adoption Among Low-Income Households with Children*

Kentucky counties participating in No Child Left Offline include Johnson, Clay, Wolfe, McCreary, Owsley, Carter, Lawrence and Morgan Counties. Low-income families are households where children are present and the annual household income is less than $25,000.


Source: 2005 and 2007 ConnectKentucky Residential Technology Assessments

2005

Non-NCLO counties: 46%
NCLO counties: 49%

2007

Non-NCLO counties: 33%
NCLO counties: 57%
Broadband Adoption Among Low-Income Households with Children*

Kentucky counties participating in No Child Left Offline include Johnson, Clay, Wolfe, McCreary, Owsley, Carter, Lawrence and Morgan Counties. Low-income families are households where children are present and the annual household income is less than $25,000. n=924 low-income households with children in 2007 and 944 low-income households with children in 2005.

Source: 2005 and 2007 ConnectKentucky Residential Technology Assessments
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