



**NEW YORK
LAW SCHOOL**

EQUITY-DRIVEN BROADBAND PLANNING IN SERVED COMMUNITIES
OVERCOMING BARRIERS TO BROADBAND ADOPTION

Broadband Communities Summit
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THE ACLP AT NEW YORK LAW SCHOOL

Mission: provide local, state, and federal policymakers with usable, data-driven analyses regarding the array of legal, regulatory, and public policy issues impacting broadband connectivity.

Focus: both sides of the connectivity equation matter.

- *Supply-side issues:* availability, rural challenges, infrastructure policy, spectrum, etc.
- *Demand-side issues:* barriers to more robust broadband adoption & use

Process: the program's research is grounded in:

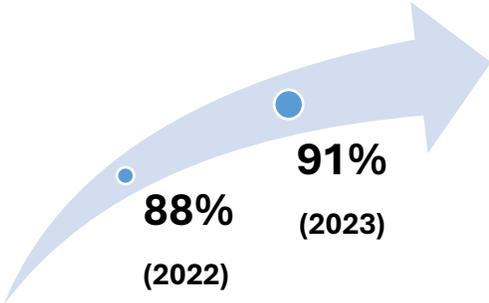
1. Gathering and presenting actual *data* re broadband connectivity and trends;
2. *Evaluating* approaches/models/projects focused on enhancing broadband connectivity; and
3. Developing practical *recommendations* based on the data.

Resource Hub: www.broadbandexpanded.com

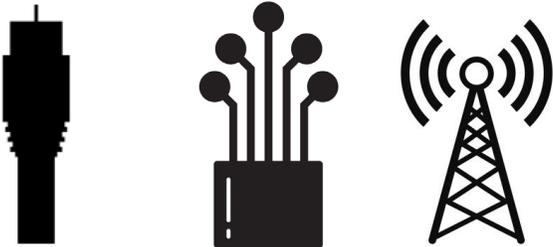
BROADBAND CONNECTIVITY IN CONTEXT

SUPPLY SIDE

Availability gaps continue to narrow



Locations served at 100/20 Mbps



Cable continues to increase speeds; fiber is available to well over half of all U.S. households; FWA from multiple providers is proliferating.

DEMAND SIDE

There have been steady gains across the board



“Broadband” adoption rate was ~76% in 2022, up from 70.8% in 2019. However, adoption gaps reflecting familiar socioeconomic characteristics remain.



ACP was impactful, but was significantly undersubscribed (~44%)

\$2.7B in digital equity grant funding will soon be awarded by states and NTIA to support broadband adoption efforts.

INTERPRETING THE DATA



Takeaway #1

Broadband expanding due to continued private investment (\$102B+ in 2022) and targeted allocation of grant funding.



Takeaway #2

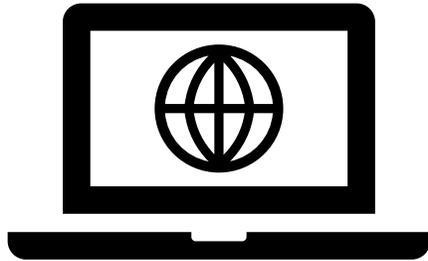
Congratulations!
If only a de minimis number of locations in an area qualify for BEAD funding, your community is served!



Takeaway #3

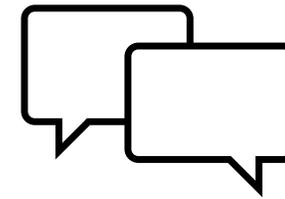
With available infrastructure \$\$\$ focused on closing availability gaps, using additional public \$\$\$ to overbuild is wasteful.

INTERPRETING THE DATA



Takeaway #4

Gains in broadband adoption are much more tenuous than gains in broadband availability, underscoring the need for deeper understanding of demand-side dynamics.



Takeaway #5

Equity conversations have long been framed around supply-side issues. This framing needs to change to address more complex demand-side issues.

WHERE DO SERVED COMMUNITIES GO FROM HERE?



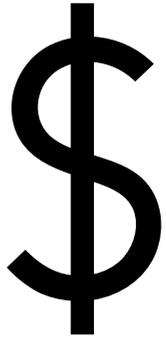
Step 1: Consider the BEAD process a “free” feasibility/market study. The location-specific highly-refined data are telling you that you’re served.

Step 2: Be on guard against those peddling the next availability divide (e.g., a cable/fiber divide; a price divide; a speed divide; a competition divide; etc.).

Step 3: If you wish to address supply-side issues, do so in a manner that doesn’t tilt the playing field (e.g., don’t use public funds to subsidize a new entrant; extend concessions to all ISPs; etc.).

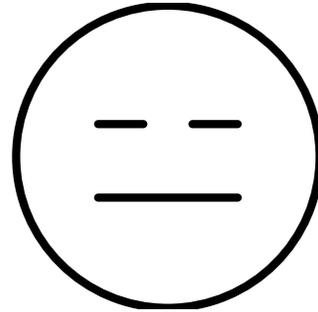
Step 4: To the extent you wish to continue forward with broadband planning, focus your resources on the demand-side. Roll up your sleeves and really dig into these complex issues.

UNDERSTANDING THE DEMAND-SIDE



Affordability

A major impediment for many, but there is a limit to price sensitivity. Even when free, many still choose not to adopt. Only 47% of ACP enrollees were non-wireline subscribers pre-subsidy.



Major Remaining Barrier

Among remaining holdouts, NTIA data continues to identify lack of interest/no need as the primary reason for remaining offline.



Additional Barriers

Within certain groups, additional barriers amplify this perceived lack of need (e.g., security concerns among older adults; accessibility issues for PWD).

OVERCOMING BARRIERS TO BROADBAND ADOPTION

- We know what works to address many barriers to broadband adoption:
 - **Wide availability** of skills training in under-adopting communities (i.e., meeting non-adopters where they live, work, meet).
 - **Trust** (in the institution offering training, in the trainers, etc.).
 - **Tailored curricula** that builds a variety of skills (from basic training to more advanced topics).
- When done properly via proven organizations, training initiatives can bring more people online and keep them there, sometimes even without subsidies. And a more digitally literate and engaged population can drive supply.
- Unfortunately, demand-side activities are resource intensive and do not lend themselves to quick “wins,” making them less attractive to policymakers than supply-side interventions.

LOOKING AHEAD

- **Addressing demand-side issues is more important than ever.** With availability divides closing, now is the time to shift focus to narrowing adoption gaps and equipping all internet users with critical skills.
- **Available resources.** DE grants will be expended quickly. Start planning now for post-DE grant sustainability and scaling proven approaches.
- **Subsidies.** As we advocate for ACP's resurrection, two stop-gaps will play important roles: (1) using available public funding (e.g., leftover BEAD \$\$) to offer some respite and (2) commitments by ISPs to extend ACP programs.
- **Local officials are on the frontlines** and must serve as first responders. At this point, continuing to pursue supply-side “solutions” to demand-side challenges is unacceptable.

QUESTIONS?

Please do not hesitate to contact the ACLP should you have any questions regarding broadband connectivity:

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