CONNECTING THE COMMONWEALTH

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Massachusetts Broadband Adoption And Digital Inclusion Research Study

Preliminary Findings – March 2014

MassBroadband 123
is an ARRA Funded Project

RECOVERY.GOV

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Digital Landscape

Computer and high speed internet access and use is essential to success in a digital world.

➢ 80% of employers require online job applications

➢ 73% of teachers assign homework that requires internet research

➢ Electronic health care records are mandated

➢ Online communication is routine and mobile communication is growing exponentially with 46% of U.S. adults using smartphones

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The Digital and Opportunity Divide

Computer and Internet use strongly correlates to:

➢ Age

➢ Educational Attainment

➢ Household Income

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MA Adoption Barriers

➢ 53% **relevancy & usability:** Don't need it, lack skills to use, or don't understand the benefit

➢ 23% **cost**: Can't afford home internet service

➢ 13% **no computer:** No or inadequate computer at home

Digital Nation: 2011 Current Population Survey

Persons using the Internet in and outside the home

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Digital Inclusion = Equal Access to Knowledge and Tools

Educational Success and Lifelong Learning

Workforce Readiness/Employment

Business Development

Health Care Information and Delivery

Access to Governmental Services

Social and Civic Engagement

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Massachusetts Non-Adopters 2011

Do Not Use the Internet:

➤ 26% of MA residents = 1.6 million people
(MA national ranking is #12)

➤ 26% of urban MA residents = 1.5 million
(U.S. ranking is #18)

➤ 30% of principal city MA residents (Boston & Cambridge) = 458,000
(MA national ranking is #25)

➤ 17% of rural MA residents = 73,000
(MA national ranking is #1)

Digital Nation: 2011 Current Population survey
Persons using the Internet in and outside the home

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Massachusetts Non-Adopters

➢ 22% of MA adults (18+) do not have a high school diploma = 558,712 /Non-adopters at 41% = **229,000**

➢ 54% of MA adults have a high school diploma or GED = 1.4 million /Non-adopters at 22% = **302,000**

2013 PEW Research Center Who's Not Online and Why Report and

2012 American Community Survey 1-Year Estimates

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Massachusetts Non-Adopters

➢ 40% of MA households earn a household income < $50,000 = 998,868 households at 36% non-adopters = **360,000** households

➢ MA Hispanic adults = 416,775 / at 24% non-adopters = **100,026**

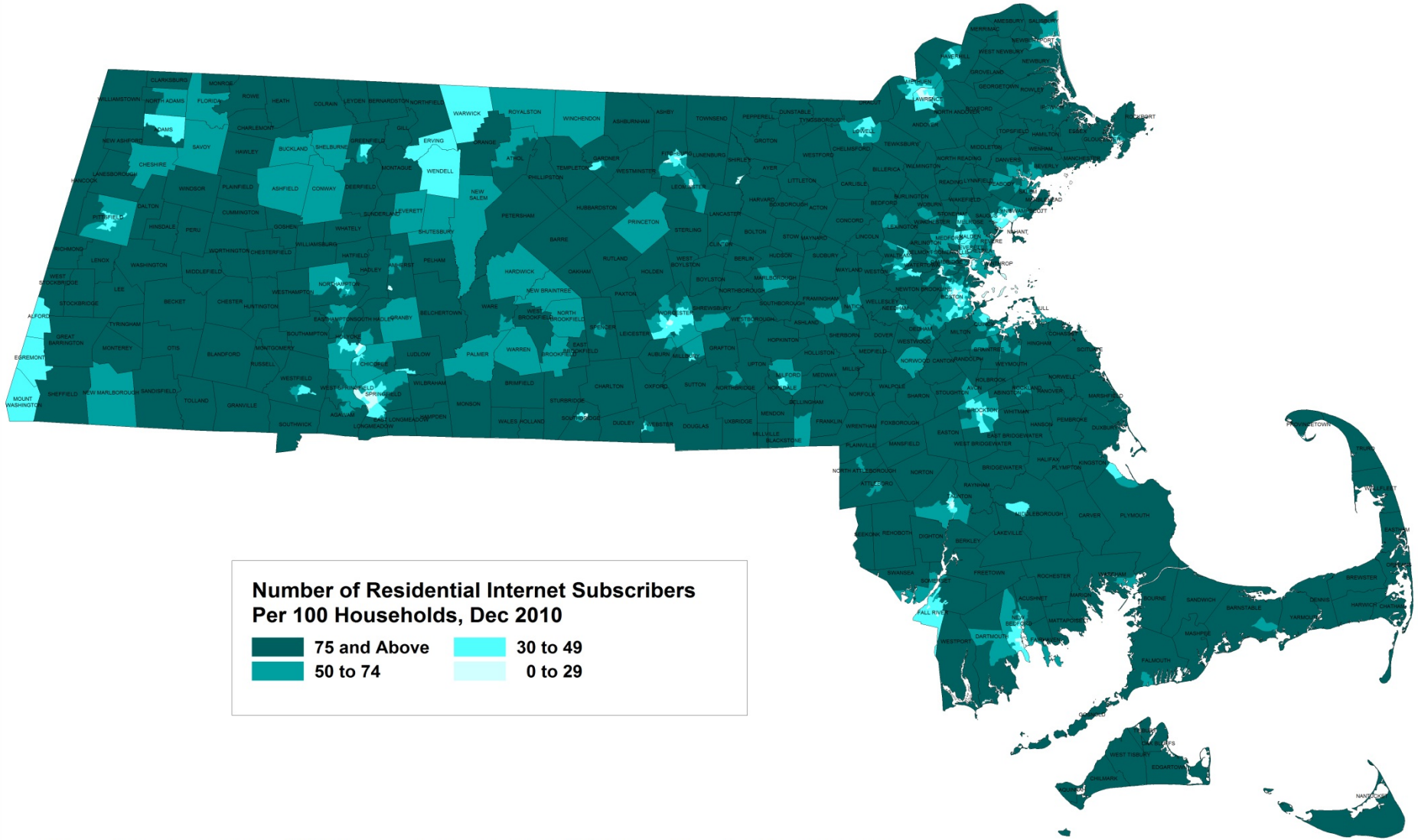**MBI** | MASSACHUSETTS BROADBAND INSTITUTE

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Massachusetts Non-Adopters

➢ MA seniors age 65+ = 961,000/ at 44% non-adopters = **423,000**

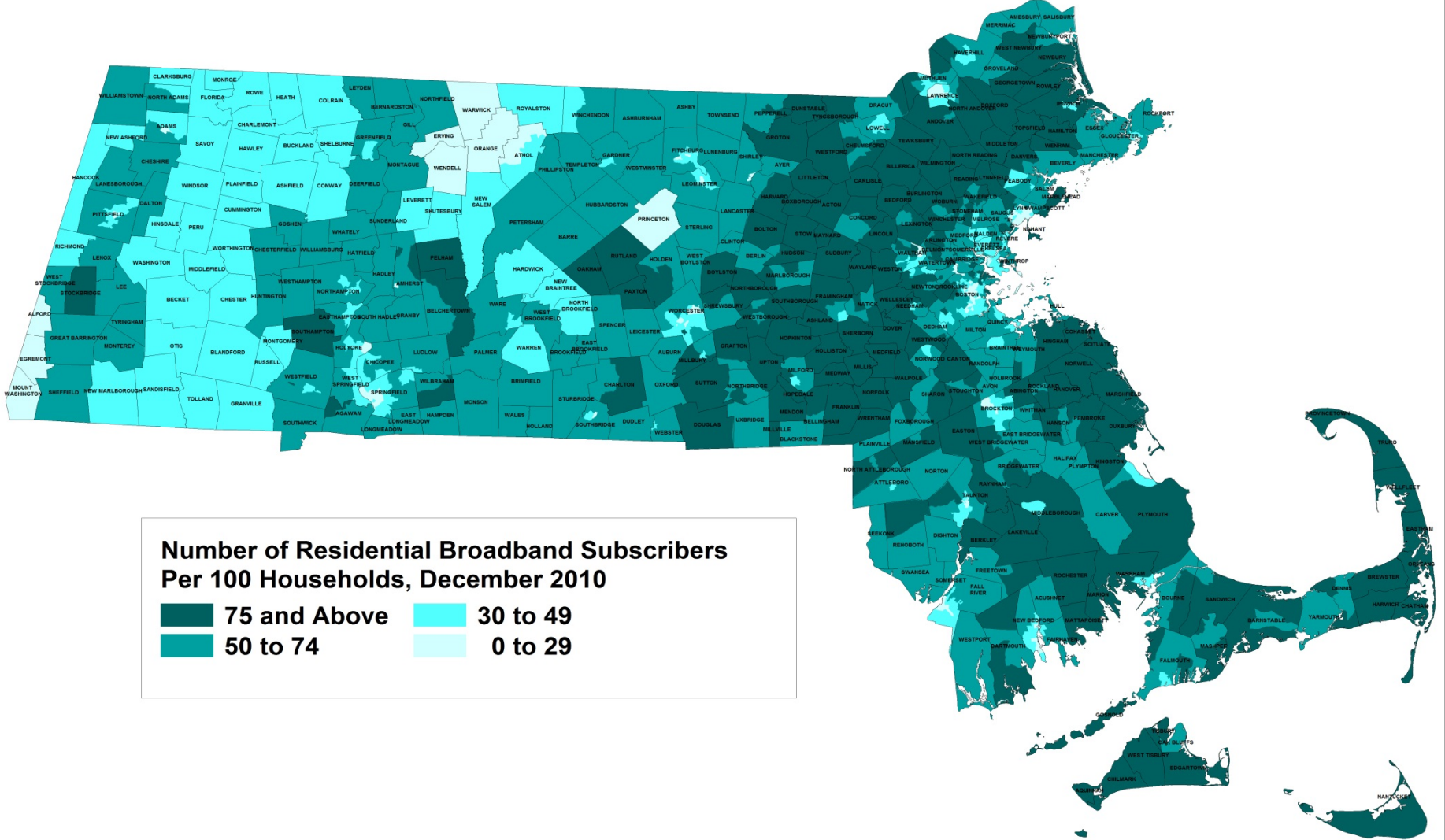➢ MA adults (18+age) with a disability = 687,912 / at 52% non-adopters = **358,000**

2013 PEW Research Center Who's Not Online and Why Report and

2012 American Community Survey 1-Year Estimates

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Residential Internet Adoption
By Census Tract, as of December 2010

Number of Residential Internet Subscribers Per 100 Households, Dec 2010

- 75 and Above
- 50 to 74
- 30 to 49
- 0 to 29

Internet service is at least 200 kbps upload and at least 200 kbps download transfer rates.

Residential Broadband Adoption
By Census Tract, as of December 2010

Number of Residential Broadband Subscribers Per 100 Households, December 2010

- 75 and Above
- 50 to 74
- 30 to 49
- 0 to 29

Broadband service is 3Mbps and above download and 768 kbps and above upload transfer rate.

Target Adoption Populations

Households with low internet and home broadband adoption rates:

- ➢ Low income households
- ➢ Educational attainment high school or less
- ➢ Hispanics and English as a second language learners
- ➢ African American households
- ➢ People with disabilities
- ➢ Seniors
- ➢ Small businesses
- ➢ Rural areas without internet access
- ➢ Urban areas with internet access but low adoption rates
- ➢ Municipal government

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Digital Inclusion Program Goals

➢ Access to and knowledge of using digital technology is an essential to promote economic development, advance educational attainment, build strong communities and citizenship, and improve delivery of government services

➢ Establish a digital adoption goal for MA

➢ Establish a comprehensive and holistic approach to broadband adoption and digital inclusion programs

➢ Establish partnerships and champions

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Digital Inclusion Program Elements

➢ Broadband availability:

    ➢ Broadband infrastructure – MBI fiber network

    ➢ Public access points – public computer centers, WiFi hotspots

➢ Affordability:

    ➢ Discounted computers and internet service for low income households and small businesses

        ➢ http://www.everyoneon.org/

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Digital Inclusion Program Elements

➤ Digital Education/Digital Literacy:
  - ➤ In School & School to Home – students and parents
  - ➤ Community based education at community centers – libraries, ABE, public housing, senior centers
  - ➤ Multiple languages with delivery by trusted community partners
  - ➤ Small business technology assessments and technology, e-marketing, e-commerce assistance

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Digital Inclusion Program Elements

➢ Universal design and assistive technology assistance

➢ Community Awareness - relevancy, benefits, and digital adoption program information

➢ Online resource and referral – Centralized website clearinghouse

  ➢digital learning classes and computer centers

  ➢online digital education resources

  ➢low cost computers and internet service

Digital Inclusion Program Elements

➤ E-health and e-government technology assessments and assistance

➤ State and regional policies
  ➤ Leadership, advocacy, leverage resources
  ➤ Establish a Digital Inclusion Advisory Board to evaluate and advocate digital inclusion programs
  ➤ Integrate digital adoption and inclusion into state and regional policies and programs
    ➤ Economic Development
    ➤ Housing
    ➤ Education
    ➤ Health
    ➤ Public Safety

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Next Steps

➢ Outreach to potential partners and organizations that serve target populations

➢ Detailed adoption data analysis

➢ Identify potential funding options and estimate program costs

➢ Final report and recommendations

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Discussion Questions

- ABE technology infrastructure and program needs?

- What needs/barriers do ABE students have regarding access to internet, access to computers, and knowledge of using these tools? % of students with home access?

- Percent of ABE programs with a computer lab/center?

- Level of interest in establishing new or upgraded computer centers and/or offering digital education trainings to clients?

- What type of digital education or technology training is currently offered in ABE programs, and what type of programs or services would be helpful to fill any gaps?

- Partnership opportunities between MBI & ABE programs?

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