

Policies for Boosting Broadband Demand
ITIF
November 5, 2009

Laura Taylor
Connected Nation

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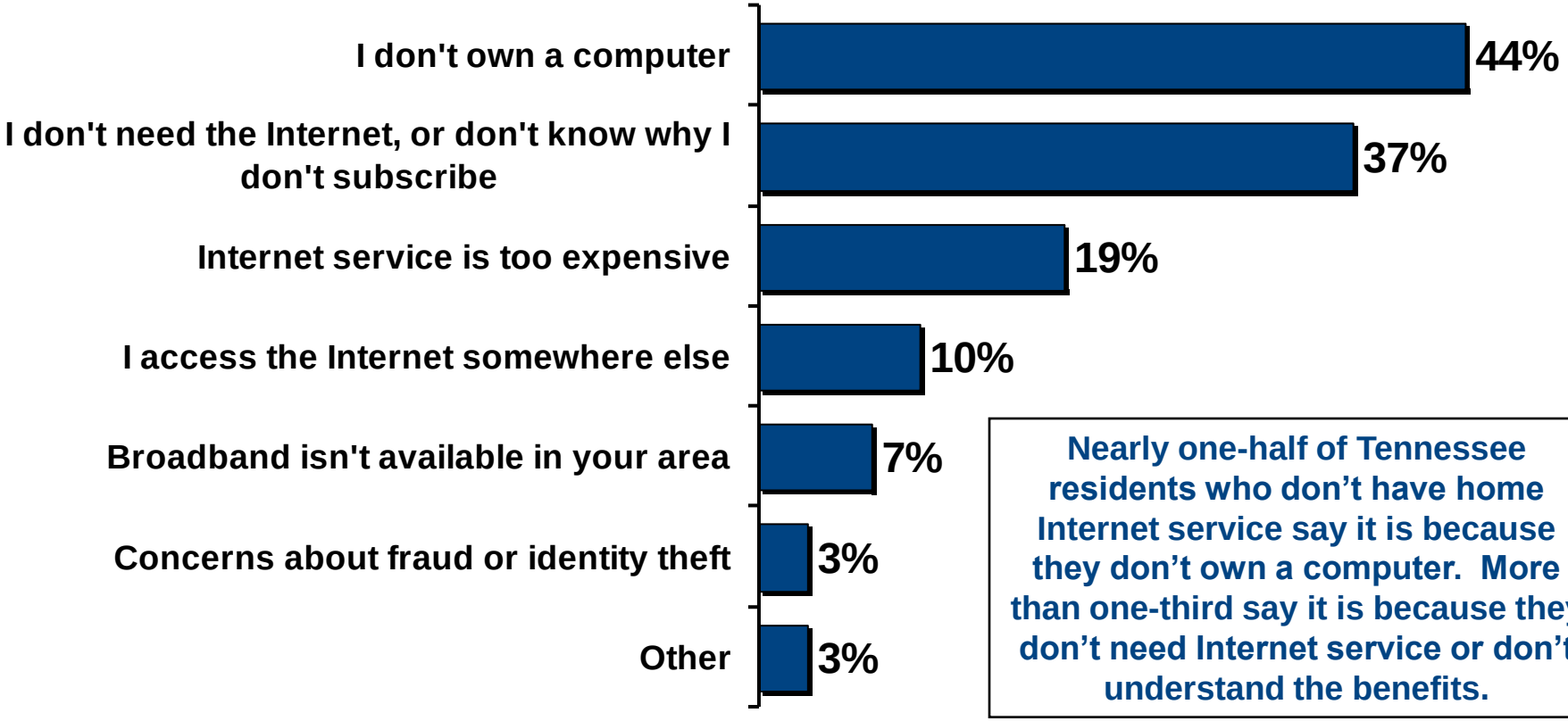
What works?

- 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

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Barriers to Internet Adoption

Among Tennessee residents with no Internet connection at home*



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.

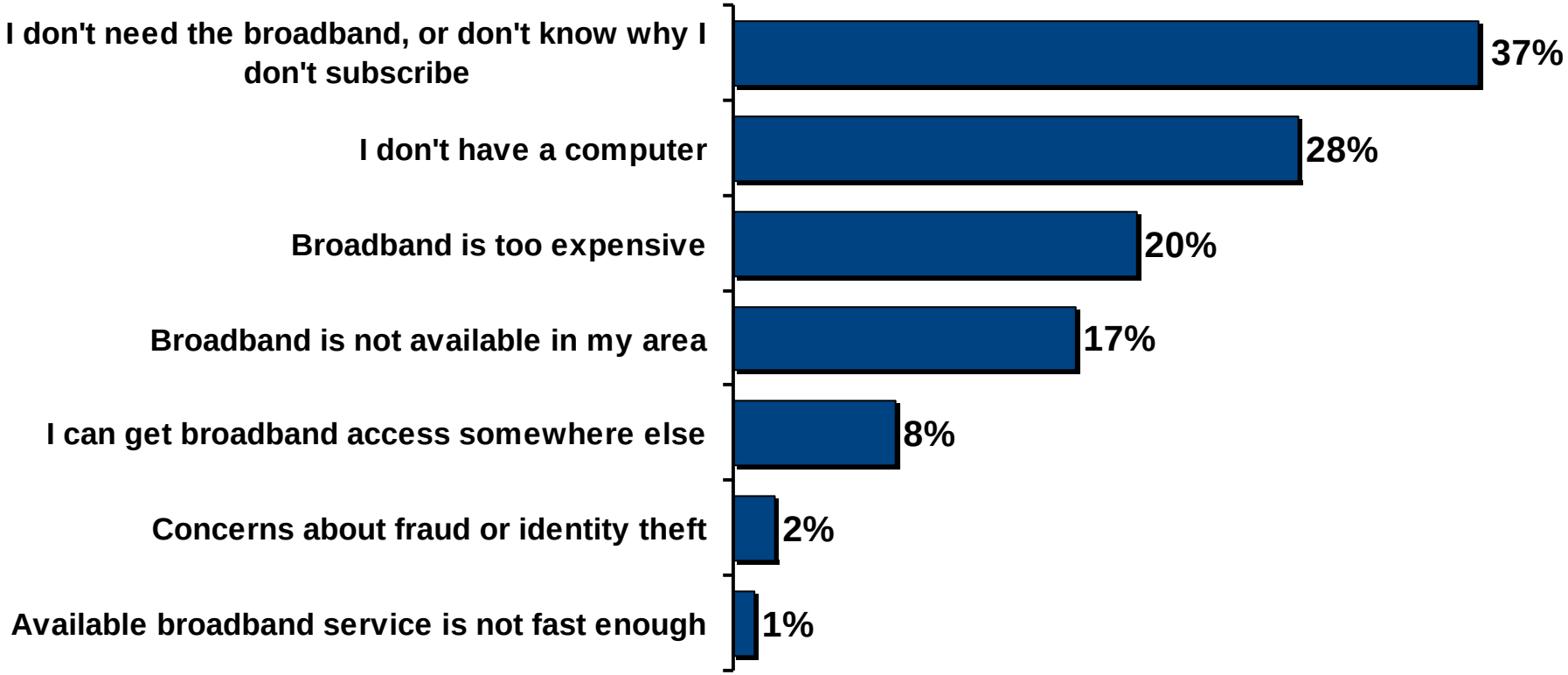
Q: Why don't you subscribe to the Internet at home?
(n=256 TN residents with no Internet service in their household)
**Percentages do not add up to 100% because individuals could give multiple responses.*

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

Barriers to Broadband Adoption

Among Tennessee residents with no home broadband service*



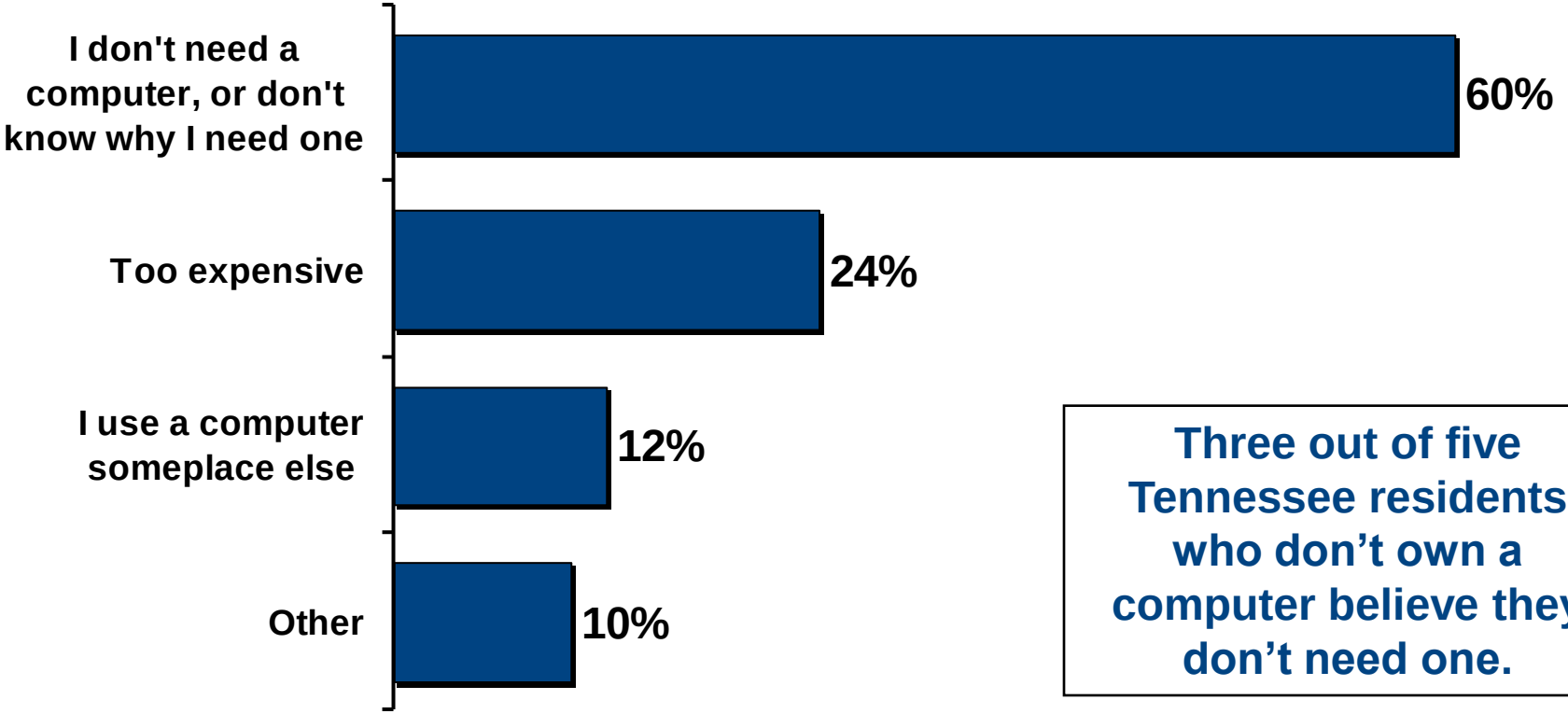
Q: Why don't you subscribe to broadband at home?
(n=550 TN residents that do not have home broadband service)
**Percentages do not add up to 100% because individuals could give multiple responses.*

Source: July 2009 Connected Tennessee® Residential Technology Assessment
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Barriers to Computer Ownership

Among Tennessee residents who do not own a home computer*



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

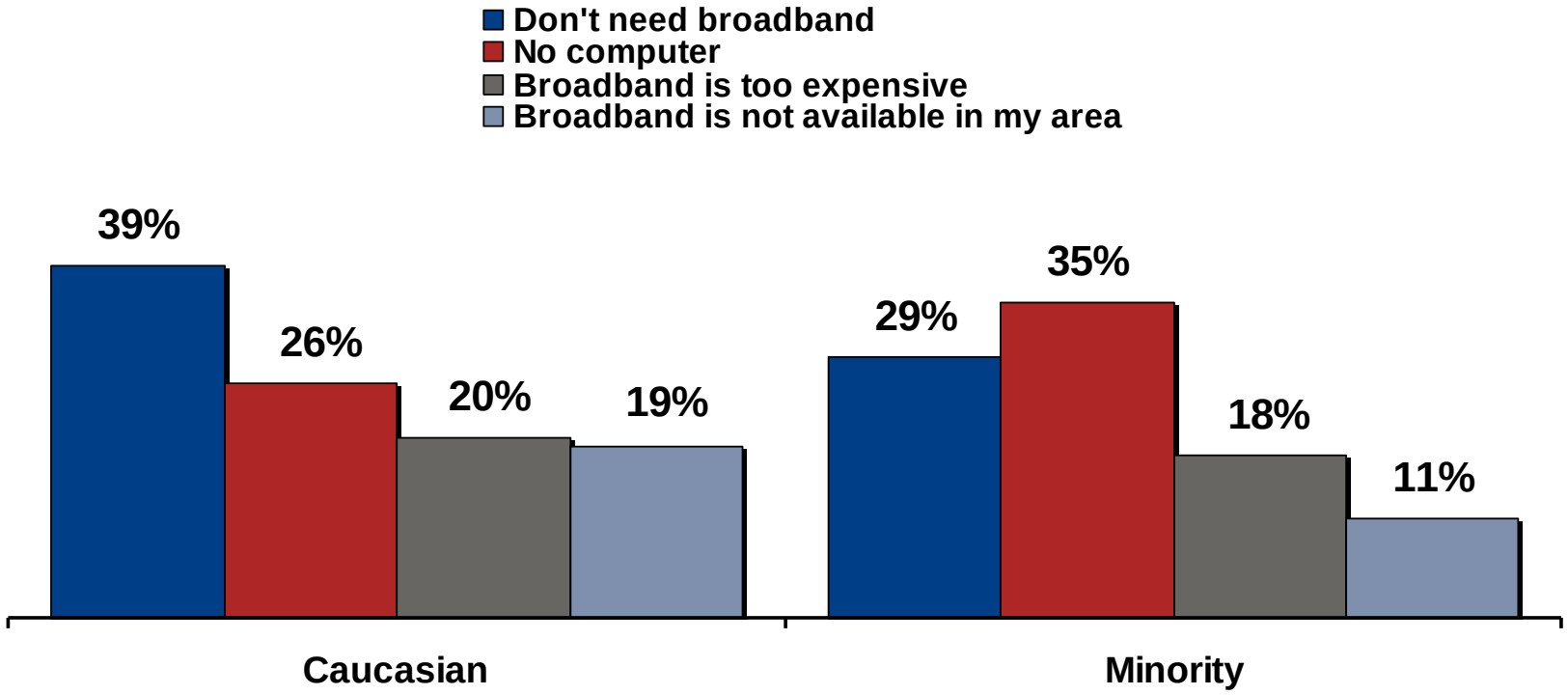
Q: Why don't you have a computer at home?
(n=294 TN residents with no home computer)
**Percentages do not add up to 100% because individuals could give multiple responses.*

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Source: July 2009 Connected Tennessee® Residential Technology Assessment
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Top Barriers to Broadband Adoption

Percent of Tennessee residents without home broadband service



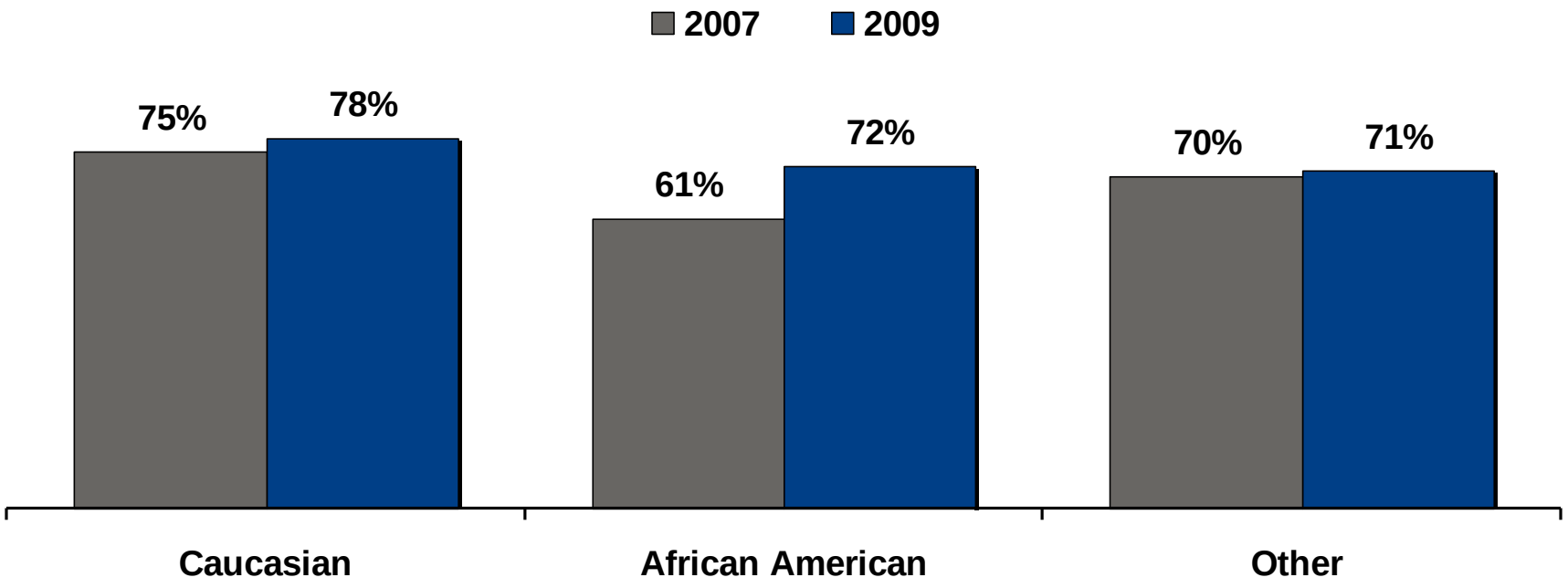
Q: Why don't you subscribe to broadband at home?
(n=550 TN Internet subscribers who do not subscribe to broadband)

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Tennessee Residents With a Computer at Home

Trends in computer ownership since the inception of Connected Tennessee®



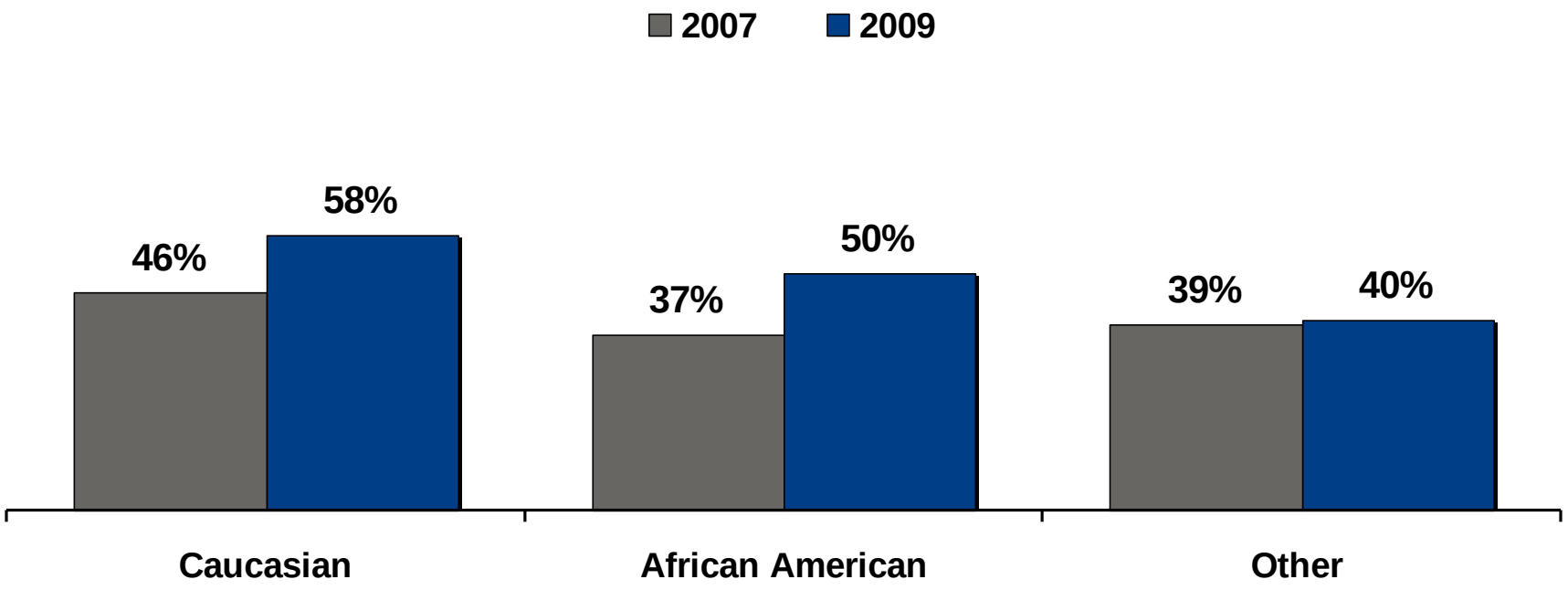
Q: Does your household have a computer?
(n=9,513 TN residents in 2007 and n=1,200 TN residents in 2009)

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)

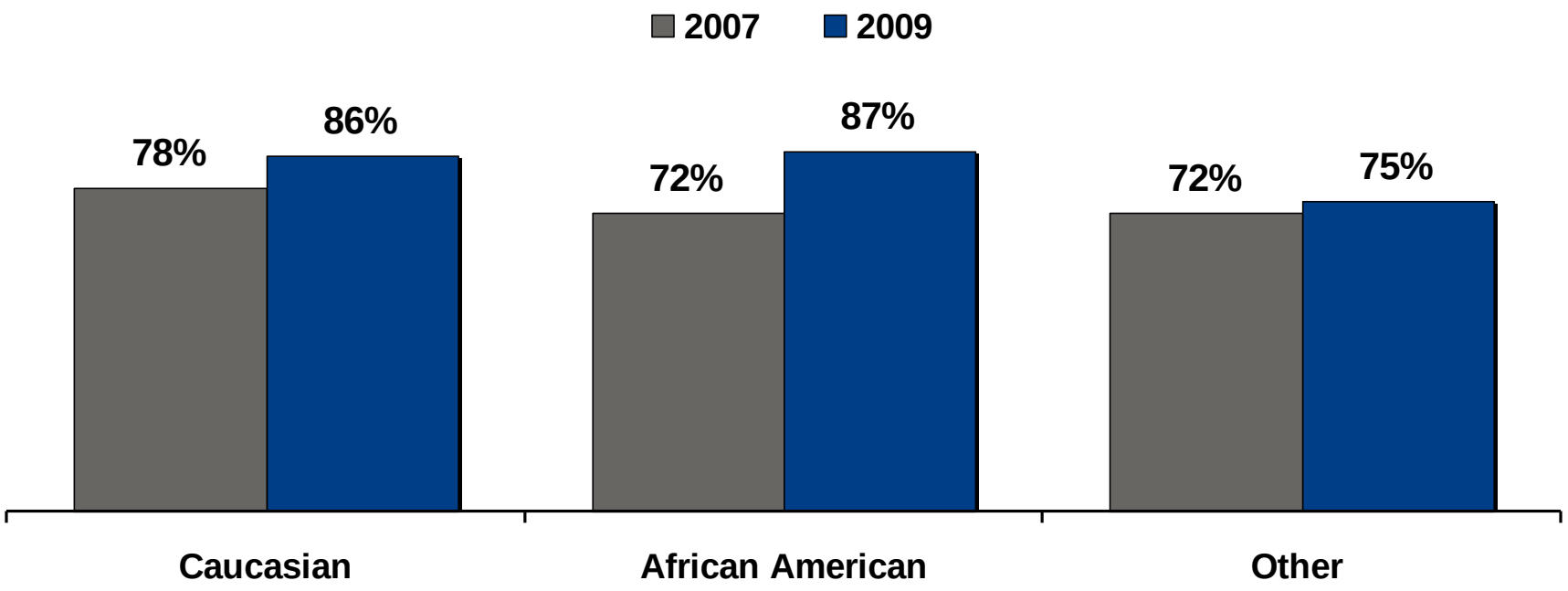
Source: July 2007 and July 2009 Connected Tennessee® Residential Technology Assessments

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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)

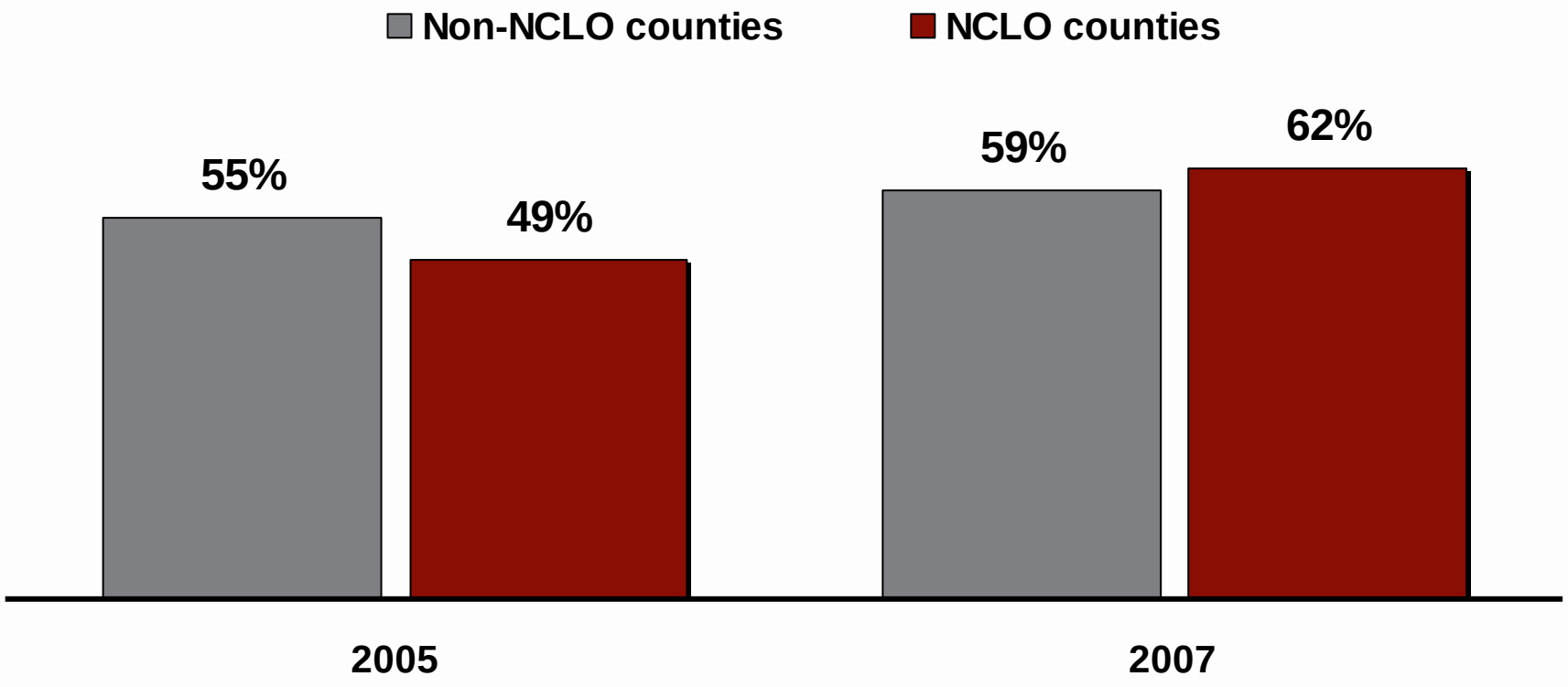
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Computer Ownership Among Low-Income Households with Children*





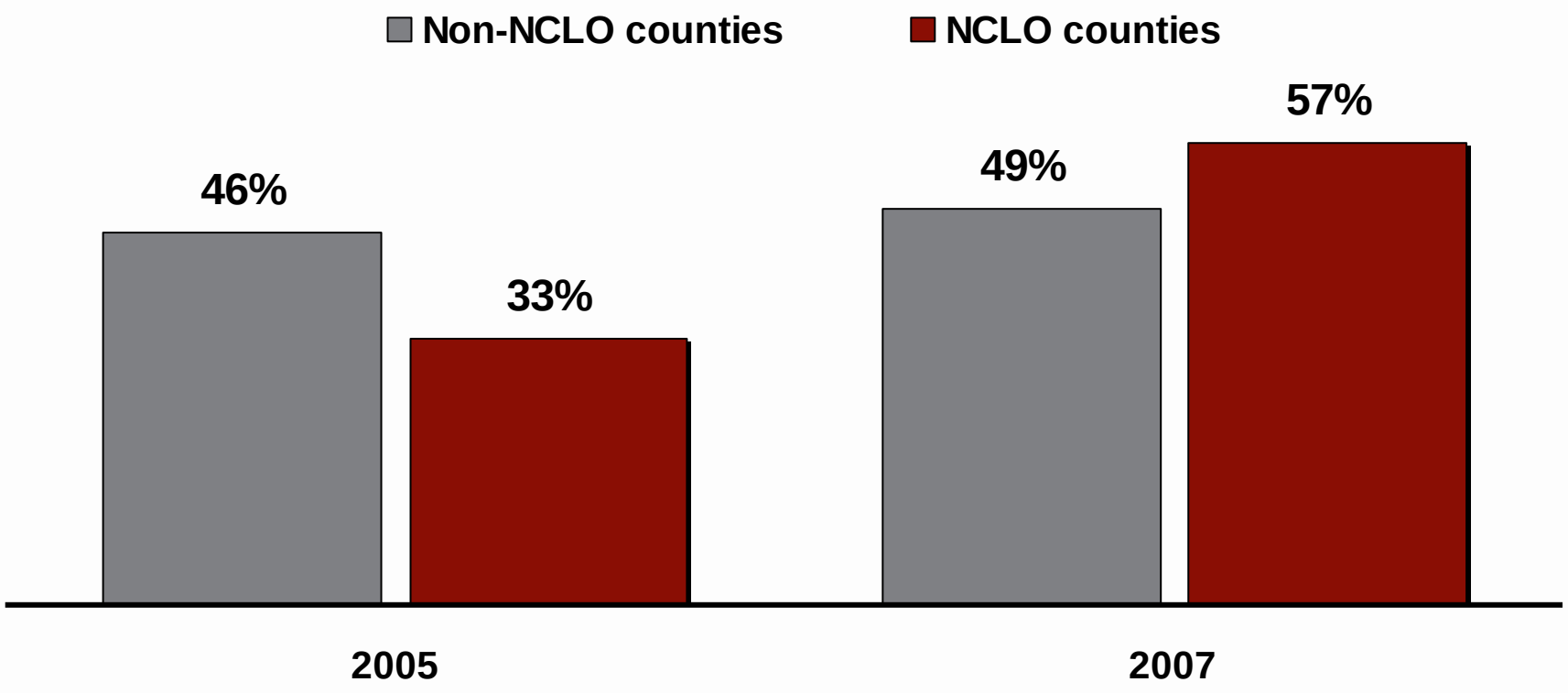
Kentucky counties participating in No Child Left Offline include Johnson, Clay, Wolfe, McCreary, Owsley, Carter, Lawrence and Morgan Counties. Low-income families are households where children are present and the annual household income is less than $25,000.
n=924 low-income households with children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

Source: 2005 and 2007 ConnectKentucky Residential Technology Assessments

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Internet Adoption Among Low-Income Households with Children*





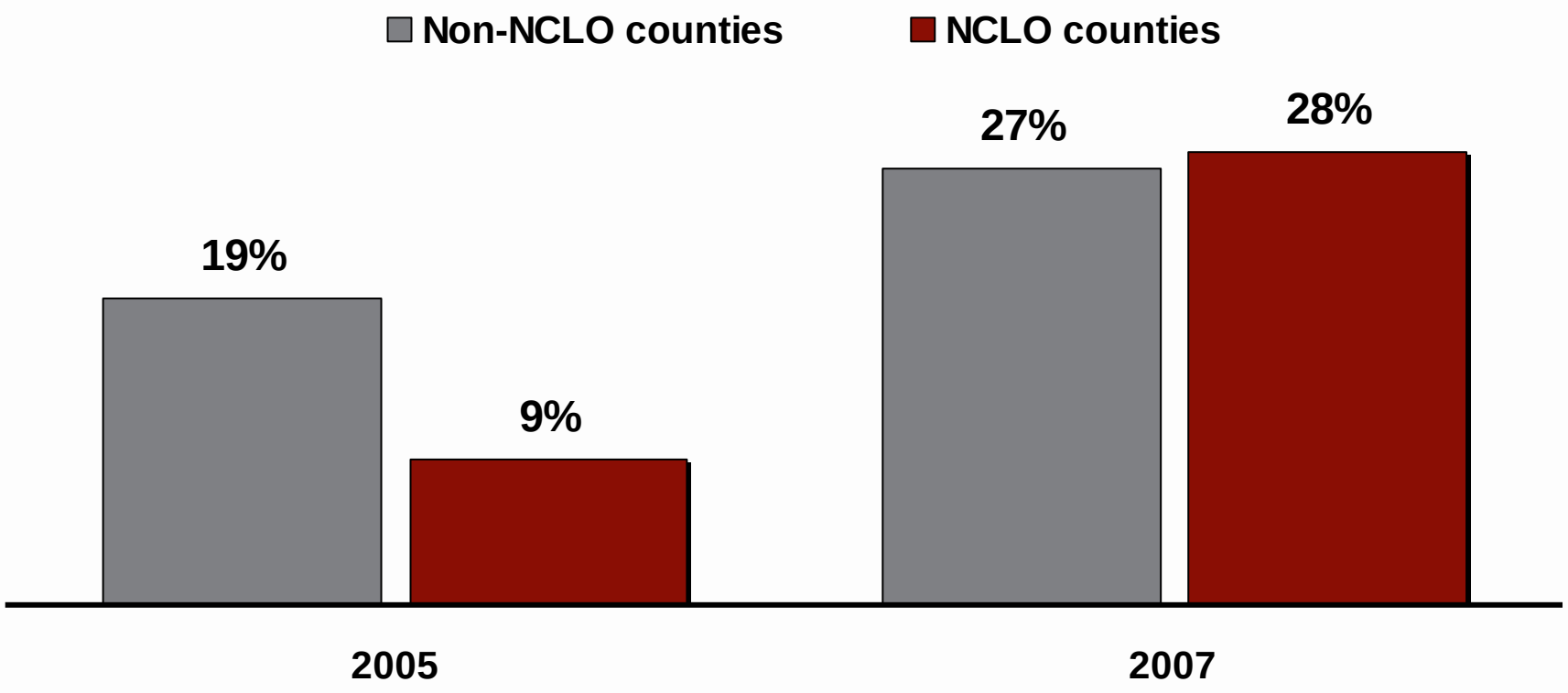
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Broadband Adoption Among Low-Income Households with Children*





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