Growth in Emergency Broadband Benefit Enrollment since June has been in Large Cities and Places with Low Broadband Adoption

Submitted on November 18, 2021

BENTON INSTITUTE for BROADBAND & SOCIETY (https://benton.org)

Thursday, November 18, 2021

Digital Beat

Growth in Emergency Broadband Benefit Enrollment since June has been in Large Cities and Places with Low Broadband Adoption

Since the Emergency Broadband Benefit launched in May 2021, enrollment has grown steadily. By the end of June, 3.1 million households had enrolled, a figure that rose to 7.4 million by the beginning of November. Analysis of the geography of this growth shows that it was not evenly distributed. South Florida, Detroit, Chicago, and New York City have all seen very strong growth in enrollment since June. In the Los Angeles area, more than 100,000 additional households have signed up since then.

Horrigan

At the same time, the general pattern of enrollment indicates that places most in need of the Emergency Broadband Benefit (that is, those with low home broadband adoption rates) have the highest rates of households signing up for the benefit.

The Universal Service Administrative Company (USAC) posts enrollment data by 3-digit zip code, which are often sizable geographic areas. Early analysis (https://www.benton.org/blog/emergency-broadband-benefit-has-thus-far-enrolled-just-1-12-eligible-households-places-low) of zip 3 data showed a number of places—such as Puerto Rico, New Orleans, and Detroit—had high rates of enrollment. Others—such as parts of Los Angeles, New York, and Atlanta—had high absolute numbers of people signing up for the benefit.

The Emergency Broadband Benefit is reaching people in the places that have the most people in need

Comparing enrollment figures in June to those in November for the same zip 3 areas shows where growth has outpaced the average and where it has not. For this analysis, the focus will be on the top 55 zip 3 area codes in terms of

Emergency Broadband Benefit enrollment. In these 55 zip 3 areas, some 2.5 million households have signed up according to USAC's November data, or 34% of all Emergency Broadband Benefit sign-ups. Between June and November, enrollment grew from 967,710 for these 55 places to 2,496,395 – an increase of 158%. The table below shows change in enrollment for the top 15 3-digit zip codes.

Table 1: Change in Emergency Broadband Benefit Program enrollment from June to November

	June	November	Growth
Miami	11,228	46,832	**317%**
Hialeah/Homestead FL	8,877	33,501	**277%**
Detroit and parts of Wayne County	18,808	68,828	**266%**
New York (Bronx)	20,683	75,402	**265%**
Cook County, IL (includes Chicago)	21,142	76,385	**261%**
Tampa	11,899	42,279	**255%**
New York (Brooklyn)	23,476	76,540	**226%**
Memphis	9,609	30,480	**217%**
Buffalo	10,119	31,671	**213%**
Orlando FL	12,385	38,548	**211%**
New York (Manhattan)	17,801	54,393	**206%**
Lake County, FL	6,938	20,735	**199%**
Hidalgo, Starr, Cameron Counties Texas	21,291	63,352	**198%**
Los Angeles (Bell Gardens, Compton, Downey, Gardena)	12,126	35,356	**192%**
Houston and part of Harris County	21,965	63,638	**190%**

Miami and places adjacent to it have experienced the strongest enrollment growth. The data for some large cities have also shown significant increases since June. Three boroughs in New York City (Bronx, Brooklyn, and Manhattan) have growth rates in excess of 200%, Cook County in Illinois (which includes Chicago), parts of Los Angeles, and Houston all have exhibited strong growth.

Another emphasis in the June analysis was the penetration of Emergency Broadband Benefit enrollment, that is, the share of all households who have signed up in various zip 3 areas. The June analysis showed that in places such as Puerto Rico and New Orleans close to 10% of *all* households had signed up, with 6%-7% ranges for Detroit, Milwaukee, Philadelphia, and Baltimore. The table below shows results for the top 15 zip 3 areas (excluding Puerto Rico) in the November data. For this analysis, the top 55 zip 3 area codes in enrollment had an estimated 10.3% of households had enrolled in the program.

Table 2: Places with greatest share of households enrolled in the Emergency Broadband Benefit Program

	Enroll JUNE	Enroll NOV	Growth	% reached

Detroit and parts of Wayne County	18,808	68,828	266%	27.2%
Hidalgo, Starr, Cameron Counties, TX	21,291	63,352	198%	17.7%
New York (Bronx)	20,683	75,402	265%	17.4%
New Orleans	13,280	23,909	80%	17.4%
Philadelphia	29,655	75,870	156%	16.2%
Milwaukee County	21,287	46,002	116%	15.9%
Cleveland	28,190	70,784	151%	15.8%
Buffalo	10,119	31,671	213%	15.4%
Tampa	11,899	42,279	255%	14.3%
Los Angeles (most of city)	36,358	100,475	176%	13.8%
Kern County CA	7,637	20,501	168%	13.3%
Columbus, OH and Franklin County	16,489	39,341	139%	13.3%
Imperial and parts of Riverside and San Bernadino Counties CA	11,519	30,265	163%	13.1%
Lafayette Parish LA	16,051	29,233	82%	13.1%
Baltimore	25,032	47,666	90%	12.4%

Table 2 shows that South Texas counties, New York (the Bronx), and the Detroit area have high growth rights in sign-ups since June and a high share of overall households who have enrolled. Philadelphia, Cleveland, and Los Angeles have growth rates around or above average since June and also exceed the norm in terms of share of homes signing up for the subsidy. Finally, New Orleans, Milwaukee, Baltimore, and Lafayette Parish all have a share of homes that have signed up for the Emergency Broadband Benefit that exceeds the figure for the group of 55 zip 3's. But that is partly because they were fast out of the EBB starting gate. Their growth rates from June to November were below the 158% figure for the top 55 zip 3 area codes.

Finally, Table 3 combines results for several metro areas whose zip 3 results were part of the top 55 zip 3's for Emergency Broadband Benefit enrollment. These results do not necessarily encompass either the metro area of the place listed or the city proper. Los Angeles is a good example. The figures below are for three zip 3 areas for Los Angeles, which include most of the city, part of Los Angeles County east of the city, and a part (approximately 30%) of San Bernadino County. The numbers for New York City are only for the Bronx, Brooklyn, and Manhattan.

Table 3: Change in Emergency Broadband Benefit enrollment in large metros

	Enroll JUNE	Enroll NOV	Growth	% reached
New York City	61,960	206,335	233%	11.1%
Los Angeles	64,484	177,206	175%	10.1%
Detroit	40,315	119,836	197%	9.6%
Atlanta	56,112	118,081	110%	5.8%
Phoenix	49,399	101,621	106%	6.5%
Miami	20,105	80,333	300%	7.3%
San Diego	22,939	54,505	138%	5.2%

As the table shows, New York and the Los Angeles over 250,000 more households enrolled in the program from June to November. Miami and Detroit had large increases as well.

Puerto Rico is a bit of a special case in this analysis. The three zip 3 areas in Puerto Rico have more than 300,000 enrollees, or about one-quarter of all households on the island. Residents of Puerto Rico have a high take rate for the Lifeline program, with over 50% of eligible households taking advantage of Lifeline compared to a 16% rate for households in the 50 states. It seems likely that many Puerto Ricans are using the Emergency Broadband Benefit to upgrade their existing Lifeline service. It is also possible that, with the well-established presence of Lifeline carriers in Puerto Rico, marketing efforts for the Emergency Broadband Benefit have paid off.

One pattern emerges across the urban and metro places in the set of 55 zip 3s: there is a correlation between broadband adoption in those areas and the percent of households that have signed up for the Emergency Broadband Benefit Program. Places with low broadband adoption rates—such as Detroit, Cleveland, or Milwaukee—have the highest share of homes that have signed up for the benefit. [1] Put differently, the Emergency Broadband Benefit is reaching people in the places that have the most people in need.

Outreach to eligible populations may matter too. Concerted efforts to boost Emergency Broadband Benefit enrollment may be having an impact. In September, the California Emerging Technology Fund called for (https://www.benton.org/headlines/california-emerging-technology-fund-calls-more-outreach-broadband-subsidies) more Emergency Broadband Benefit outreach and has worked to spread the word. In New York, the city government and other stakeholders have touted a plan (https://gothamist.com/news/monthly-federal-discount-internet-service-available-all-nyc-public-school-families) to address the city's digital divide using the Emergency Broadband Benefit Program.

As the FCC transitions the Emergency Broadband Benefit to the Affordable Connectivity Plan, this data and other research offer some guidance.

- Uptake of the Emergency Broadband Benefit has been strong. In less than 6 months, more than 7 million households have enrolled. By comparison, the high-water mark in participation in the Lifeline program in recent years was 12 million in 2016 (https://www.gao.gov/assets/gao-17-538.pdf) (even though it is about half that today).

- The pandemic has shown not just the necessity of having service, but also how many people struggle with affordability. In Philadelphia (https://www.phila.gov/media/20211019110414/Connecting-Philadelphia-2021-Household-Internet-Assessment-Survey.pdf), for instance, one-third (31%) of low-income households lost service during the pandemic because of difficulty in paying their broadband bills.

- Persistence in outreach is likely to be important. Recent survey research in Philadelphia (https://www.phila.gov/media/20211019110414/Connecting-Philadelphia-2021-Household-Internet-Assessment-Survey.pdf) showed that 13% of respondents had heard of the Emergency Broadband Benefit and 31% had heard of discount offers such as Comcast Internet Essentials. The Philadelphia survey, conducted in July, reflects results shortly after the Emergency Broadband Benefit's launch; Internet Essentials has been around since 2012. Both figures suggest a need to increase the awareness of these programs.

- Improving the process by which eligibility for a discount plan is verified would help. The Philadelphia survey found that, among low-income respondents who had not signed up for a discount plan, significant numbers had difficulty determining whether they qualified. The FCC, under the infrastructure bill, has the ability to conduct outreach. If the Build Back Better bill passes, the FCC will have funding to do this outreach. Improved processes for verifying eligibility could make a difference.

These findings indicate that demand is strong for programs such as the Affordable Connectivity Program created by the Infrastructure Investment and Jobs Act (https://www.benton.org/blog/how-infrastructure-investment-and-jobs-act-will-make-broadband-more-affordable), affordability struggles are real, and that outreached and improved eligibility processes can make a difference to participation. Focusing on these administrative details is the challenge for the FCC to meet as it plans the rollout of the Affordable Connectivity Program.

Results for top 55 Zip 3 areas

	Enroll JUNE	Enroll NOV	Growth	% reached
Miami	11,228	46,832	317%	7.8%
Hialeah/Homestead FL	8,877	33,501	277%	6.8%
Detroit/Wayne County	18,808	68,828	266%	27.1%
New York - Bronx	20,683	75,402	265%	17.4%
Cook County	21,142	76,385	261%	8.6%
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New York - Brooklyn	23,476	76,540	226%	9.4%
Memphis	9,609	30,480	217%	12.0%
Buffalo	10,119	31,671	213%	15.4%
Orlando FL	12,385	38,548	211%	10.4%
New York - Manhattan	17,801	54,393	206%	8.9%
FL Lake County	6,938	20,735	199%	7.3%
Hidalgo, Starr, Cameron	21,291	63,352	198%	17.7%
Los Angeles II	12,126	35,356	192%	8.2%
Harris County/Houston	21,965	63,638	190%	6.3%
Boston/Cambridge	7,156	20,700	189%	4.2%
CA San Bernadino County	13,474	38,028	182%	11.3%
Dallas County	14,791	41,321	179%	9.1%
Los Angeles	36,358	100,475	176%	13.8%
Fayetteville NC	13,741	37,700	174%	12.2%
Kern County CA	7,637	20,501	168%	13.3%
Puerto Rico	112,666	301,457	168%	25.3%
Riverside & Imperial Counties	11,519	30,265	163%	13.1%
Riverside County	13,474	35,241	162%	10.5%
LA County & some San Bernadino	16,000	41,375	159%	6.9%
Philadelphia	29,655	75,870	156%	16.2%
San Antonio/Bexar County	21,415	54,065	152%	10.0%
Atlanta - Fulton, DeKalb	12,319	31,036	152%	9.3%
Cleveland	28,190	70,784	151%	15.8%
St Louis	13,413	33,625	151%	9.8%
CA San Diego	13,559	33,640	148%	7.7%
Detroit metro	12,389	30,306	145%	5.3%

Merced, Stanislaus, Tuolumne Counties	14,179	33,876	139%	8.0%
Columbus/Franklin County	16,489	39,341	139%	13.3%
Macomb County & Oakland	9,118	20,702	127%	4.8%
Indianapolis & Marion County	17,713	40,064	126%	11.2%
San Diego County	9,380	20,865	122%	3.4%
Cincinnati (Hamilton County)	15,520	34,499	122%	11.2%
Milwaukee County	21,287	46,002	116%	15.9%
Phoenix	22,587	48,512	115%	9.8%
Greenville County SC	13,191	28,299	115%	7.8%
Maricopa County (not Phoenix)	15,153	32,150	112%	7.0%
Atlanta - Henry, Clayton, Fayette	14,307	29,883	109%	8.4%
Louisville (Jefferson County)	14,572	30,356	108%	9.6%
Tucson & Pima County	16,635	33,721	103%	10.6%
Atlanta - Cobb, DeKalb, Gwinnet	17,753	35,857	102%	4.0%
Las Vegas	29,275	58,153	99%	10.4%
Kalamazoo County	10,680	21,119	98%	7.8%
Baltimore	25,032	47,666	90%	12.4%
Oklahoma City	11,417	21,179	86%	8.5%
Lafayette Parish LA	16,051	29,233	82%	13.1%
Atlanta - Cobb, Cherokee, Carroll, Douglas	11,733	21,305	82%	4.7%
New Orleans	13,280	23,909	80%	17.4%
Maricopa County (not Phoenix)	11,659	20,959	80%	3.4%
Tulsa	14,596	24,416	67%	9.6%

Notes:

[1] Across 30 urban and metro areas in the zip 3 data where it is reasonable to match those places to city or metro level broadband adoption rates from the 2019 American Community Survey, the correlation is -0.4 between broadband adoption and percent of households that have enrolled in the Emergency Broadband Benefit Program.

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