

San Antonio and Greater Bexar County Community Digital Equity Plan and Roadmap

Fact Base

August 2021

Disclaimer:

The information found in this portal is intended for public use. It reflects work produced and provided by the SA Digital Connects team and community members starting in January 2021 to the present.

Some information will reflect the moment in time when the work was done. Data, funding, maps and assumptions may fluctuate in the everchanging digital ecosystem.

Fact-base

Our fact-base is organized against four core components

Components

Key Takeaway

Size and nature of the need



More than **130K households (20%+)** are estimated to lack adequate **internet access**, however, the true number of **San Antonio/Greater Bexar County households** who need improved broadband infrastructure and digital inclusion is even higher; gaps in access are largely driven by barriers to affordability and adoption

Many efforts to address the digital divide are underway today



Many **local organizations are investing** to address the digital divide with a focus on student needs, but **better data and coordination** are required to effectively deliver a holistic solution

Closing the divide matters for equity & the economy



Closing the divide is critical to **reducing systemic inequities** (e.g., education, health, workforce) and **driving economic growth** in public and private sectors

We are in a unique moment to have an impact



There is **significant funding** at federal, state & local levels to capitalize on and the City of San Antonio/Greater Bexar County are in a position to both have **an impact and serve as a model** for others; adherence to **key principles** (e.g., create a cross-sector coalition, productively engage the community/ISPs) will ensure success

Fact-base 2-page summary

For discussion | High level overview of the fact-base (I/II)

Category	Details	Status
Size and nature of the need	<p>The pandemic laid bare the size and impact of the digital divide in the COSA/Greater Bexar County: The current understanding of the need is that more than 130K households (20%+) lack adequate broadband internet and more than 65K (10%+) lack access to devices, with variation across geography and population segments (income, education, ethnicity)</p> <p>However, this likely undercounts the true number of households who would be positively impacted by our plan</p> <ul style="list-style-type: none"> Households may be purchasing broadband even though it is not sustainably affordable (e.g., 30% of households have income <\$50K in which case a \$50/mo plan would be >1.5% of post-tax income) Current data captures perceived household need; actual usage data may reveal a greater gap in access Over time, the need for speed, digital skills for new digital applications will increase, impacting a broader set of hhds. <p>While affordability and adoption are the major barriers, availability of infrastructure is also a challenge</p> <ul style="list-style-type: none"> Availability: Estimated 50K (40% of disconnected) households lack access to adequate (100 mbps) service Affordability: Estimated 90K (70% of disconnected) households report that they cannot afford their monthly bill Adoption: Estimated nearly all 130K households without access face adoption barriers - including lack of comfort with digital tools, language barriers, fear of devices (e.g., liability, damages), or motivation. 	
Many efforts to address the digital divide are underway today	<p>Many local organizations are investing to address the digital divide: The majority of efforts are focused on addressing the need for students and digital literacy (Library/BiblioTech, Older Adults Technology Services-Senior Planet (OATS))</p> <ul style="list-style-type: none"> For students: Districts and schools have worked to close a percentage of the internet divide and the device divide, leveraging programs including Connected Beyond The Classroom, BiblioTech, Texas A&M San Antonio, Operation Connectivity For public housing: SAHA is retrofitting/installing saturated public WiFi in all public housing, connecting 30K individuals; current focus is on “Big 3” on the Westside covering 9K individuals For Older Adults: OATS developed an effective program and train-the-trainer model for adoption/digital literacy 	
<p>Current data on need, hard & soft assets presents an incomplete view of the state of broadband access, limiting the ability of stakeholders to effectively define solutions and target initiatives</p>		

Legend: Status of the compiled fact-base  Completed  In progress  Not started

For discussion | High level overview of the fact-base (II/II)

Category	Details	Status
Closing the divide matters for equity and the economy	<p>Closing the divide is critical to reducing systemic inequities - in education, health, workforce, among others</p> <ul style="list-style-type: none"> For example, students without internet access earn \$2M less in their lifetime¹ It also enables inclusion for all segments - students, educators, employers, veterans, people living with disabilities, etc. <p>Digital access creates a flywheel of economic growth, improving talent pipelines, strengthening business/government operations, and transforming COSA/Greater Bexar County into a vibrant business hub and community</p> <ul style="list-style-type: none"> Each day a person lacks internet, America loses \$2.16 of potential economic activity, resulting in \$130M of lost economic activity per day² Digital access also plays a growing role in transforming industries such as education/e-government and contributes to broader workforce and business development <p>The need for digital access will only continue to grow, as digital becomes foundational to day-to-day applications and the need for speed and data increases for applications and households</p>	
We are in a unique moment to have an impact	<p>There is significant funding at federal, state & local levels; we must act to capitalize on this funding</p> <ul style="list-style-type: none"> Our analysis found that \$400M+ is available for Bexar County Broadband through Federal recovery funds (e.g., EBB, E-Rate, State/local). In addition, existing broadband funding sources exist to support broadband (e.g., FCC) State broadband legislation (HB5/SB5) and associated funding allocations will soon be available Local funding pools and potential infrastructure bonds can also support efforts <p>COSA/Greater Bexar County has the momentum, funding and engagement to both have an impact and serve as a model for others</p> <ul style="list-style-type: none"> We can ground in our key principles for success, including establishing the right leadership, engaging a cross-sector coalition (with community orgs, ISPs, etc.), and grounding solutions in community needs and best practices We can shape policy and regulation to have an impact and overcome historical legislative headwinds 	

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Fact-base 5-page summary

The size and shape of the need in San Antonio and Greater Bexar County

Category	Details	Status
Size and Nature of The Need	<p>The pandemic laid bare the size and impact of the digital divide in COSA/Greater Bexar County: The current understanding of the need is that more than 130K households (20%+) lack adequate broadband internet and more than 65K (10%+) lack access to devices</p> <ul style="list-style-type: none"> This disproportionately impacts households that are low-income, lower educational attainment or Hispanic - and acutely impacts those who are not English proficient There is significant variation by geography: the South/East side face the greatest rates without access The two biggest groups without access are low-income households and households with children. These two groups account for more than 70% of households caught in the divide 	
Broader Impact	<p>However, this likely undercounts the true number of households who would be positively impacted by our plan</p> <ul style="list-style-type: none"> Households may be purchasing broadband even though it is not sustainably affordable (e.g., 30% of households have income <\$50K in which case a \$50/mo plan would be >1.5% of post-tax income) Current sources capture perceived household need when actual usage and speed data may reveal that even more families lack adequate access Over time, households will demand greater internet speeds and utilization and thus will require access to higher speeds; additional digital skills and adoption programs will be needed to support this broader population 	
Barriers to Adoption	<p>While affordability and adoption are the major barriers, availability of infrastructure is also a challenge</p> <ul style="list-style-type: none"> Availability: Estimated 50K (40% of disconnected) households lack access to reliable, adequate (100 mbps) coverage. This is the typical usage for a family of four - and speed needs are only expected to increase. Some areas are disproportionately impacted: The Southside averages speeds of <5mbps and is served by few providers Affordability: Estimated 90K (70% of disconnected) households report not having access because they cannot afford their monthly bill; yet the actual number in need of cost assistance may be higher - nearly 200K households qualify for the Lifeline subsidy program Adoption: Estimated nearly all 130K households without access face adoption barriers - including lack of comfort with digital tools, language barriers, fear of damaging devices, or motivation. 25% of residents are illiterate; pop segments face distinct challenges (seniors, not English proficient) 	

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Many efforts to address the digital divide are underway today (I/II)

Category	Details	Status
Overview of current efforts	<p>Many local organizations are investing to address the digital divide; the majority of efforts are focused on digital literacy, addressing the need for students</p> <ul style="list-style-type: none"> We inventoried efforts to support local digital inclusion: in total more than 140 organizations, school districts and institutions of higher education are involved <ul style="list-style-type: none"> A range of support is offered: subsidized, devices access, digital literacy / technical support, etc. While some areas have significant access to resources, it is not provided equitably and gaps persist To bolster these efforts, greater info sharing and coordination of funding / resources is needed 	
Detailed targeted efforts (I/II)	<p>For students: Districts and schools have worked to close the internet divide and the device divide</p> <ul style="list-style-type: none"> Districts and schools have taken a variety of approaches (e.g., Operation Connectivity, 1:1 devices) Connected Beyond The Classroom (CBTC)/Bibliotech: Pilots from City and City Education Partners (CBTC) and the County (Bibliotech) aim to address connectivity among students in most underserved areas, serving 20K and 100 students, respectively <ul style="list-style-type: none"> Pilots are an effective tool to connect individual students (e.g., no data caps, low monthly costs), but have some limitations to long term scale (e.g., limited capacity mgmt., low speeds) Texas A&M SA: Supporting the pilots by conducting ongoing evaluation, establishing a help desk, and building a digital scholars' program to staff the help desk and teach students digital/job skills Operation Connectivity: Funded the purchase of devices, hotspots; entering the next phase to offer discounted ISP rates, run pilots on emerging tech across Texas Digital will continue to be the backbone of education going forward: schools have indicated that they will maintain digital for curriculum, individual learning pathways, as well as ongoing hybrid models Going forward, districts will need funding, support on ISP engagement, digital literacy, among others 	

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Many efforts to address the digital divide are underway today (II/II)

Category	Details	Status
Detailed targeted efforts (II/II)	<p>For public housing: SAHA is retrofitting/installing saturated public WiFi in all public housing, connecting 30K individuals; current focus is on “Big 3” on the Westside covering 9k individuals</p> <ul style="list-style-type: none"> Experienced speeds range from 50-100 Mbps, with high levels of usage (150+ simultaneous connections) SAHA partners with BiblioTech, ConnectHome, etc. to provide digital support resources and establishing a local digital inclusion coordination 	
	<p>For older adults: OATS developed an effective train-the-trainer model for adoption/digital literacy</p> <ul style="list-style-type: none"> OATS offers digital literacy training for seniors, identifying the use cases and challenges most pertinent to them; feedback has been overwhelmingly positive with a 90% NPS and strong retention They are expanding their reach by recruiting “network weavers” i.e., orgs that have extensive contact with the seniors (e.g., Catholic charities, Meals on Wheels, etc.) and training them to support seniors 	
Data	<p>Current data presents an incomplete picture of the state of broadband access, limiting the ability of stakeholders to effectively define solutions and target initiatives</p> <ul style="list-style-type: none"> Household Needs: A mix of quantitative (ACS, SASpeakUp) and qualitative assessments (interviews, focus groups) isolate the size and shape of the need; upcoming Texas A&M SA research offers a path to assess and track the state of the need on an ongoing basis Hard assets: A map of existing hard assets (fiber, utilities, land) is critical to assessing the feasibility of solutions. While partial maps exist today (e.g., to inform the CBTC pilots), no integrated source exists Soft assets: There is limited visibility in what services are being provided and where. As a results it is difficult to know where efforts are redundant, where gaps exist, and where to allocate funds 	

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Closing the digital divide matters for equity and the economy

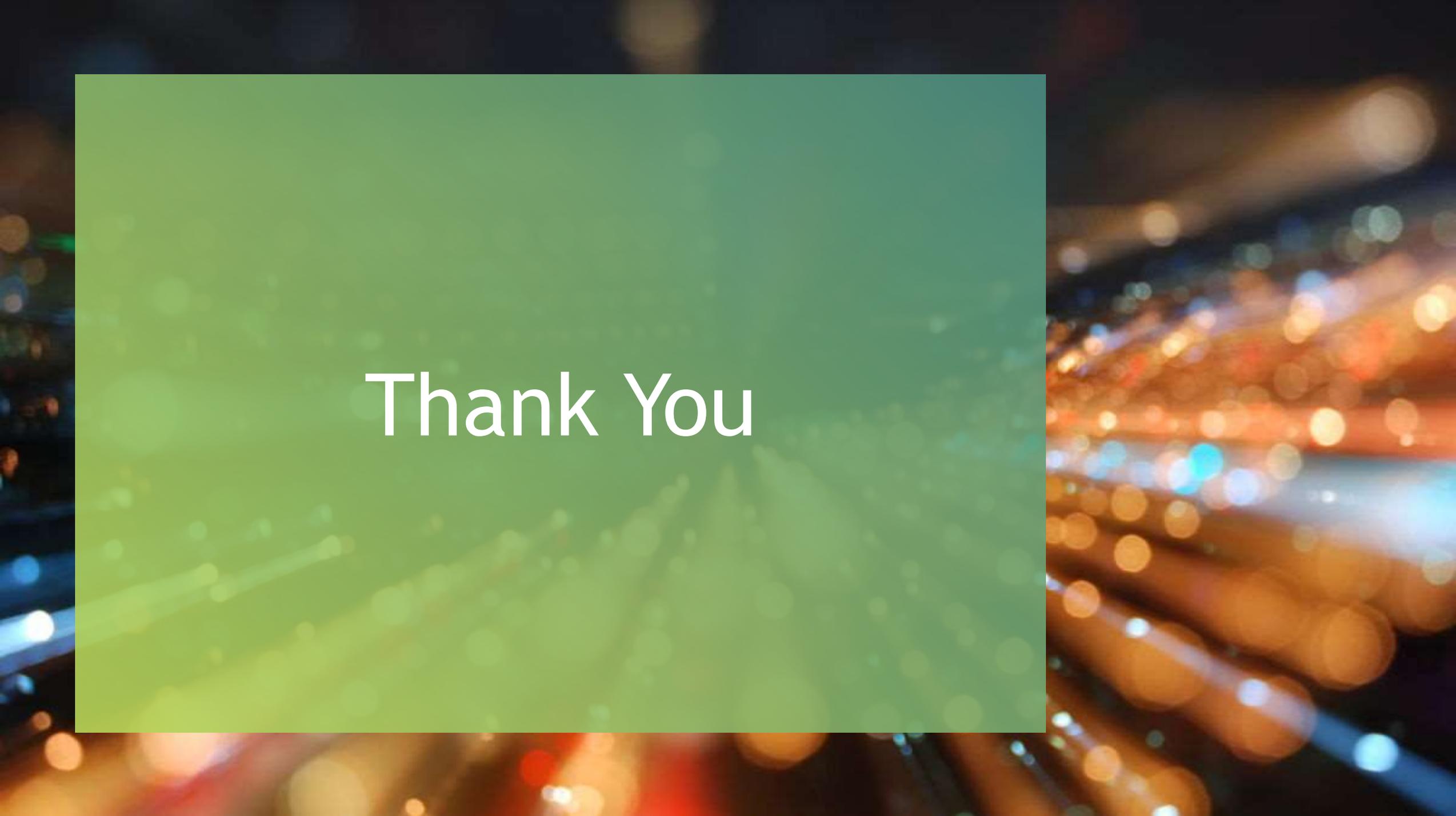
Category	Details	Status
Equity	<p>Closing the digital divide is critical to reducing systemic inequities, including -</p> <ul style="list-style-type: none"> • Students without access have 0.4% lower GPA, 7% lower college attend rates, and make \$2M less in lifetime earnings • Workers: 76% of Black and 62% of Hispanic workers will be ill-prepared of 9 out of 10 jobs by 2045; • Health: Telehealth reduces hospital admission by 20%, length hospitals stays by 59% • And critical for enabling societal inclusion for all population segments - students, educators, employers, employees, veterans, people with disability, among others 	
Economic impact	<p>Digital access creates a flywheel of economic growth by improving talent pipelines, strengthening business/government ops, and transforming COSA/Greater Bexar County into a vibrant business hub and community</p> <ul style="list-style-type: none"> • Driving econ growth, as each additional 10% of internet penetration Increases per capita GDP by 1.2%; each day a person lacks internet, America loses \$2.16 of potential economic activity, resulting in \$130M of lost economic activity per day • Expanding e-government, integrating new gov't services to drive efficiency, reach and savings • Transforming workforce dev, equipping households with 21st century job skills • Transforming business ops., unlocking new use cases (e.g., telehealth, precision ag) 	
Future need	<p>The need for digital access will only continue to grow</p> <ul style="list-style-type: none"> • Most individuals need 25/12 mbps and a typical household of four needs at least 100 mbps; this demand for speed and data is only likely to grow • Businesses will require greater speeds for day-to-day applications (e.g., remote continuous monitoring) 	

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We are in a unique moment to have an impact

Category	Details	Status
Funding	<p data-bbox="372 305 1811 339">There is significant funding at federal, state & local levels; we must act to capitalize on this funding</p> <ul data-bbox="397 344 2186 568" style="list-style-type: none"> <li data-bbox="397 344 2186 415">• Our analysis found that \$400M+ is available for Bexar Country Broadband through Federal recovery funds (e.g., \$7B+ for E-Rate, \$3B+ for EBB, potential \$100B for infra.) and existing broadband funding sources (e.g., FCC) <li data-bbox="397 419 1905 454">• Other federal funds can be leveraged (e.g., USDA, FCC grants) for infra., digital literacy, among others <li data-bbox="397 458 1421 492">• The state is likely to allocate funding to broadband (e.g., HB5 / SB5) <li data-bbox="397 496 1434 531">• The city can invest in grants and is considering an infrastructure bond <li data-bbox="397 535 1217 568">• Private donors are willing to invest (e.g., HEB, Toyota) 	
Policy	<p data-bbox="372 591 1811 625">We can shape policy and regulation to have an impact and overcome historical legislative headwinds</p> <ul data-bbox="397 629 2186 701" style="list-style-type: none"> <li data-bbox="397 629 2186 701">• The city can support deployment of fiber as a municipal provider, a wholesaler, a lease-to-own or grant model; other municipalities (Mont Belvieu) offer model for challenging municipal restrictions 	
The San Antonio story	<p data-bbox="372 723 1844 758">San Antonio and Greater Bexar County has the momentum, funding and engagement to have an impact</p> <ul data-bbox="397 762 2186 872" style="list-style-type: none"> <li data-bbox="397 762 2186 833">• Existing tract record of action (SASpeakUp, CBTC, COSAnet) on digital inclusion and network of community organizations engaged deeply with the community <li data-bbox="397 838 2046 872">• With the right leadership and operating model, we are poised to have an impact and serve as a model for others 	
Key principles	<p data-bbox="372 895 1607 929">Adherence to key operating model and solution principles will ensure program success</p> <ul data-bbox="397 933 2186 1042" style="list-style-type: none"> <li data-bbox="397 933 1862 968">• The right leadership across a cross-sector coalition will unlock collaboration with communities/ISPs <li data-bbox="397 972 2186 1042">• By grounding solutions in community needs and taking best practices from benchmark municipalities, we are poised not only to have an impact but also to serve as a model for others 	

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Thank You