



Hispanic Broadband Access:
Making the Most of the Mobile, Connected Future

The Hispanic Institute
Mobile Future

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Hispanic Broadband Access: Making the Most of the Mobile, Connected Future is a joint research project of The Hispanic Institute and Mobile Future.

The Hispanic Institute is a 501 (c)(3) designated nonprofit organization. The Hispanic Institute's mission is sharply focused: THI provides an effective education forum for an informed and empowered Hispanic America. The Hispanic Institute has managed a number of projects including, studies of Hispanic economic contributions, media monitoring, consumer fraud and citizenship education.

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Mobile Future is a broad-based coalition of businesses, non-profit organizations and individuals interested in and dedicated to advocating for an environment in which innovations in wireless technology and services are enabled and encouraged. Our mission is to educate the public and key decision makers in business and government on the broad range of wireless innovations that are transforming our society and the nation's economy.

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In the U.S. this year, we have seen a significant initiative by the U.S. government to have federal agencies each make at least two key services available to Americans via their wireless devices. The effort is a clear recognition that for key government services to be readily accessible to the public, they needed to be offered in a mobile-friendly way. No population has more to gain from such a move than the Hispanic population thanks to their high use of mobile phones to access the Internet. This progress builds on the United States' national broadband policy, announced in March 2010. Its goals are ambitious, not the least of which is that “at least 100 million U.S. homes should have affordable access to actual download speeds of at least 100 megabits per second and actual upload speeds of at least 50 megabits per second” (Federal Communications Commission, 2010). The importance of connecting millions of people to the country's economic and social future cannot be overemphasized. It holds the promise of a connected society, which is essential to maintaining a competitive posture in the world and to realizing America's promise of a fair chance to prosper in a digital-dominated world. Broadband access is closely aligned with economic opportunities and a wide array of social benefits.

This paper, which updates an earlier publication on the same subject (The Hispanic Institute; Mobile Future, 2009), explores the broadband behavior, challenges and opportunities of the nation's 50.5 million Hispanics, more than 16% of the total U.S. population (U.S. Census Bureau, 2011). It seeks to provide insights into how a better understanding of this community and its connectivity—increasingly defined by a strong preference for mobile broadband access—can help shape a successful national broadband strategy that spurs substantial new opportunities.

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The importance of broadband Internet access for all Americans is no longer a subject for debate. It is critical to accessing virtually every aspect of modern life, and any person or group of people without a quality high-speed Internet connection is at a distinct disadvantage. However, like so many other critical tools, broadband service is not yet universal, though important progress is being made. Among other goals, the National Broadband Plan calls for 100 million homes to have Internet access with download speeds of 100 megabits per second and upload speeds of 50 million megabits per second. Importantly, it also calls for the United States to “lead the world in mobile innovation with the fastest and most extensive wireless networks of any nation” (Federal Communications Commission, 2010). Last year, President Obama issued an order directing federal agencies to make available an additional 500 MHz of Federal spectrum for commercial use. According to the President’s memorandum “[e]xpanded wireless broadband access will trigger the creation of innovative new businesses, provide cost-effective connections in rural areas, increase productivity, improve public safety, and allow for the development of mobile telemedicine, telework, distance learning, and other new applications that will transform Americans’ lives” (President Obama, 2010).

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The key word is “mobile,” when it comes to Hispanic Americans, who continue to lag behind other groups in broadband access at home. Mobile broadband access provides a vast array of options and new uses for technology that could enhance Hispanics’ ability not just to connect, but also to utilize

their connections in ways that allow them to function more fully in society. In particular, Hispanics have latched on to social media, a pervasive influence in the way that information is distributed in commerce, government and personal activities. For example, there were 16.7 million unique visits by Hispanics to Facebook in 2011, an increase of 8% over the previous year. Twitter use was up 32% year over year, and Hispanics were 17% more likely than the average consumer to build or update personal blogs (Perez, 2012).

Wireless broadband technology is helping many Hispanics confront challenges, such as limited education and lower incomes that have presented significant obstacles in the past. In this respect, Hispanics' experience with wireless broadband technology is similar to the ways in which earlier technological advances, such as the telephone, the automobile and rural electrification, helped to improve the opportunities available to all Americans in the early 20th century. Broadband connectivity — and wireless Internet in particular — affords Hispanics greater access to educational, health, government and business opportunities.

This paper will explore some of the reasons why mobile broadband is so vital to the interests of Hispanics, as they play an increasingly visible, crucial role in all aspects of American life, even as they continue to strive to overcome educational, financial and cultural hurdles. For them, mobile broadband is the key to enhanced healthcare services, educational opportunities and access to government resources, along with a host of other services that offer Hispanics new routes to full participation in the American Dream.

Demographics

More than 50 million Hispanics live in the United States, according to the 2010 U.S. Census, representing a diverse population of distinct cultures and demographics, and they are expected to become an even larger community in the future. The U.S. Census Bureau has projected that there will be 132 million Hispanics in the U.S. by 2050, accounting for more than 30% of the total U.S. population. Hispanics are part of a highly visible demographic trend, notably underscored in the May 2012 report by the U.S. Census that for the first time, minority births in the United States had surpassed the number of White births (Muskal, 2012).

Among Hispanics, Mexicans are the largest group by far, with a population of 31.8 million, nearly two-thirds of the entire U.S. Hispanic population; followed by Puerto Ricans at 4.6 million; Central Americans at 4 million; South Americans at 2.8 million; Cubans at 1.8 million; Dominicans (Dominican Republic) at 1.4 million; and Spaniards at 635,253 (U.S. Census Bureau, 2011).

The 2010 Census also notes that though 75% of Hispanics are concentrated in eight states with Hispanic populations of at least 1 million (California, Texas, Florida, New York, Illinois, Arizona, New Jersey and Colorado), Hispanics live in all 50 states. Regionally, the West leads with 28.6%, followed by the South (15.9%), the Northeast (12.6%) and the Midwest (7%). As a percentage of their respective state populations, Hispanics are most concentrated in New Mexico (46.3%), followed by California and Texas (each with 37.6%), Arizona (29.6%), Nevada (26.5%), Florida (22.5%) and Colorado (20.7%) (U.S. Census Bureau, 2011).

As a group, Hispanics are younger than the overall United States population. The median age for Hispanics is 27, compared to 37 for the overall U.S. population and 42 for non-Hispanic Whites (Pew Hispanic Center, 2012). Still, Hispanics lag in educational attainment. Sixty two percent of Hispanics have earned a high school diploma, and a mere 14% have earned at least a bachelor's degree, compared with 30% for the country at large. The low high school and college graduation rates for Hispanics are reflected in earning power. The median family income for Hispanics is just \$39,730, compared to \$60,088 for all Americans (U.S. Census Bureau).

Hispanics' Mobile Broadband Use Trends

Three characteristics — youth, money and education — tend to be shared traits of new technology early adopters. Yet, the lack of two of those, money and education, have failed to stem young Hispanics' ardor for the latest mobile broadband devices and services. Nearly 70% have laptops, 51.5% have smartphones, and 18.8% have tablets (eMarketer Daily, 2012). Ninety percent of Hispanics, ages 18-29, have cell phones (Livingston, 2011).

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Overall, however, Hispanics are still behind other ethnic groups in most uses of digital technology. But, the gap is closing rapidly, especially with respect to use of mobile devices, as noted in a report by the Pew Hispanic Center. Seventy six percent of Hispanics reported using cell phones in 2010, compared with 79% of African Americans and 85% of Whites. The Pew Hispanic Center also finds that Hispanics are closing the gap in the way they use cell phones. Seventy seven percent of Hispanic mobile phone owners use them to access non-voice applications, compared with 75% of Whites, and 79% of African Americans. Hispanics lead Whites in using mobile phones to access the Internet, 40%-34%, though they are significantly behind African Americans, at 51%. Hispanic mobile phone owners, 45%, lead both Whites, 24%, and African Americans, 44%, in sending and receiving instant messages (Livingston, 2011). Reporting on a new Nielsen study, the online publication Tech Crunch says that in 2011 Hispanics were 68% more likely than non-Hispanic Whites to view video online and 20% more likely to do it on a mobile device (Perez, 2012).

A new study of Hispanics' Internet usage in Nevada, where Hispanics are more than a quarter of the population, is especially illustrative of how Hispanics operate online. In most categories, the study shows that Hispanics are active online, often lagging just slightly behind the non-Hispanic levels of usage. However, in one crucial area — searching for jobs online — Hispanics lead non-Hispanics by a significant margin — 57% vs. 43%. Another important area of use, which can be seen in the following table, is in taking online classes or doing research for school work — 49% vs. 44% (Technology Adoption Among Hispanics in Nevada, 2012).

Internet Usage Comparison

Which of the following activities do you conduct using the Internet?

Nevada Average

Hispanic Adults

Non- Hispanic Adults

Communicating through e-mail or other ways of sending messages	89%	81%	92%
Researching or purchasing goods or services	77%	69%	80%
Exploring or participating in hobbies or personal interests	74%	71%	75%
Online banking or paying bills	72%	71%	73%
Reading online newspapers or other news sources	66%	64%	67%
Searching for medical information or communicating with healthcare professionals like doctors or insurance offices	50%	48%	51%
Searching or applying for jobs	45%	57%	43%
Taking online classes or conducting research for schoolwork	44%	49%	44%
Interacting with government offices or elected officials	31%	22%	33%

Hispanic Immigrants' Impact on Mobile Use

Immigration is a significant factor in Hispanics' embrace of mobile broadband. In many developing countries, there are relatively few traditional telephone landlines due to infrastructure limitations. As a result, cell phone use often eclipses landline usage in those countries. Thus, many Hispanic immigrants arrive in the United States with a propensity for mobile use. Therefore, transition to smartphones and other similar devices seems an easy step, which may partly explain why immigrants are more likely to have mobile phones even if they have relatively lower incomes than the average U.S. resident.

In Mexico, Central America, South America and the Caribbean, mobile subscriptions are expected to reach 1,170 subscriptions per 1,000 people by 2020. In this region, Mexico, with 135.4 million subscribers, is second only to Portuguese-speaking Brazil. Colombia is third with 61.1 million. In 2009, Latin American landline penetration was just 18.6% of the total population, compared with 88.2% mobile penetration (Euromonitor International, 2010). Given that roughly 40% of Hispanics are foreign-born (Pew Hispanic Center, 2012), it is unsurprising that Hispanics have migrated to wireless broadband devices and services.

Although mobile broadband is a critical tool for improving the lives of Hispanics across the board, four areas stand out:

- 1) Education*
- 2) Healthcare*
- 3) Civic Engagement and Access to Government Services*
- 4) Business and Finance.*

Education

In addition to offering students new educational resources and tools, wireless access can help Hispanic parents keep in close contact with their children's teachers to check on assignments, behavior and classroom progress. Through the increasing use of email and text messaging, parents and teachers can communicate whenever it is most convenient, and parents can maintain regular contact with teachers without repeatedly taking off time from work to attend parent-teacher meetings. Today, school websites routinely allow teachers to post assignments, downloadable documents and other online resources to help students expand their studies beyond the school day. Smartphones and other wireless devices make those resources increasingly accessible to students and parents, including those without broadband connections in the home.

Recognition of the importance of broadband access is evident in a new report by the State Educational Technology Directors Association (State Educational Technology Directors Association, 2012). The report makes a series of recommendations for enhancement of the education experience for students and teachers through improved broadband service, including advocacy for the use of mobile devices for remote access (State Educational Technology Directors Association, 2012). In school districts across the country, teachers are employing a growing array of mobile education tools and developing lesson plans that range from having students develop short mobile texting translations of classic literature to demonstrating reading comprehension to playing video games that teach age-appropriate math and vocabulary lessons in a fun and interactive way. All of these pioneering efforts engage connected students via their cell phones, a tool the students view as an integral part of their daily lives. These innovative approaches also allow educators, parents and students to break down the walls between school- and after-school environments. Mobile education innovations are also helping to ensure that new academic efforts reach children from disadvantaged families, many of whom cannot afford the cost of a personal computer in the home.

One of the more interesting innovations is Project K-Nect in North Carolina, which has developed a program to improve middle school math scores by providing students with smartphones to allow them to access educational tools in and out of the classroom. The smartphones allow the students to use Internet resources, such as www.algebra.com, for supplemental content that ties into subjects the teachers are covering in the classroom. Additionally, the students can collaborate with other students after school hours and make regular contact with tutors who can help them with problems, strategies and specific skills (Project K-nect).

The mobile mindset of the younger Hispanic population thus offers a prime opportunity to take advantage of these fast-emerging innovations to improve educational attainment for Hispanics. Mobile education tools offer crucial math, language and other learning opportunities that Hispanics can take advantage of and personalize on their wireless devices.

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Healthcare

As the health care system faces greater demand for services, health care providers increasingly seek to achieve greater efficiencies by using telemedicine and other technological advances to help patients make use of their wireless devices to access a variety of health care services, information and follow-up care. Exceptional savings in costs and improvements in care can be achieved through the use of broadband technology. Hospitals could save as much as \$371 billion, and other benefits could be achieved through use of videoconferencing and digitized health records (Federal Communications Commission, 2010).

Mobile technology makes it possible for patients, such as Hispanics who are more likely to suffer from diabetes, obesity and cardiovascular disease than some other groups, to receive more personalized and immediate care. Using mobile devices, patients can receive text reminders to check blood sugar levels, take medications and exercise daily. Mobile monitoring devices can log patient data and send it directly to health care providers.

Today, insurance companies already send letters to policyholders about their use of medications. By tracking prescription refills on diabetic medications, for example, insurers can determine when patients have stopped taking their medications, placing them at greater risk of diabetes-related complications. By using text messaging, the time for delivering such notices to patients and speed life-enhancing interventions can be shortened. Access to mobile broadband gives Hispanics an efficient path to health care services of all types.

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Civic Engagement, Access to Government Services

Hispanics have come to represent an increasingly important voting bloc, courted by politicians at local, state and federal levels. Thus, smart political operations have moved to build effective use of social media, and other forms of communication that use broadband, into their campaigns and their ongoing communications with constituents. For example, after the November 2008 election, the Obama transition team set up www.change.org, a web site that allowed anyone to participate in a variety of online discussions on key issues the incoming administration was trying to address. Taking part in these discussions, accessing videos and other elements of the web site required broadband access. In 2012, both President Obama and Republican challenger Mitt Romney have targeted young voters online, including 6.3 million Hispanics under 30, with mobile-optimized websites (Goodrich, 2012). 40% of Hispanics use mobile devices to access the Internet, and are 20% more likely than non-Hispanic Whites to view video wirelessly, so it is central to campaigns across the nation to engage this growing voting block via mobile content.

As important as the voting process is to ongoing engagement with elected officials and all public institutions, the Internet has also become the way in which we learn about policy decisions, learn about school closings on snow days, reserve books and other materials at the public library, express our opinions in letters-to-the-editor and conduct many other functions in the public space. Without broadband, and mobile broadband, especially, in the case of Hispanics, this all becomes more difficult.

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Business and Finance

Much in the way that public engagement today requires broadband access, so too does interaction in the world of business and finance — for business owners and consumers. Hispanics have proven themselves to be entrepreneurial, and they have started businesses at a significant rate. According to data from the Ewing Marion Kauffman Foundation's Index of Entrepreneurial Activity, 565,000 new businesses were created per month in 2010. On that scale, Latino business creation increased from 0.46% in 2009 to 0.56% in 2010, the group's highest rate for new business starts in 15 years. In comparison, African Americans dropped from 0.27% to 0.24% and non-Hispanic Whites dropped from 0.33% to 0.31% in the same period. Additionally, immigrants were more than twice as likely to start new businesses as were native born citizens (Fairlie, 2011).

Despite this track record of entrepreneurship and other indicators of their engagement with the economy, Hispanics are also among the most “unbanked” populations, meaning that they do not have a relationship with a bank, or “underbanked,” referring to those with limited relationship experience with established banking institutions. The Federal Deposit Insurance Corporation found that 43.3% of Hispanic households were either unbanked or underbanked, compared to 54% of African Americans, 18.2% of Whites and 10.7% of Asians (FDIC Unbanked/Underbanked Survey Study Group, 2009). These two seemingly conflicting characteristics — active entrepreneurship and lack of engagement with banking — point to an important way in which mobile technology can benefit the Hispanic population. In a survey of online activity conducted in February 2008 by eMarketer, 72% of respondents reported having engaged in some form of online banking (Phillips, 2008). This suggests that although Hispanics might not have ongoing formal relationships with banking institutions, they are comfortable transacting business online. The eMarketer survey noted above showed that 69% of respondents shopped online and 59% took advantage of coupons, rewards and incentives.

As small business owners, many Hispanics start their businesses from their homes. Mobile access to supplier and customer web sites often are essential to businesses that may be run out of a garage or even a car. Additionally, mobile banking may be more appealing to the roughly 40% of U.S. Hispanics who are foreign-born and often come to the United States from developing countries where mobile banking is more commonplace in everyday life. To fully take part in the American business mainstream, Hispanics must have access to mobile business and banking opportunities. Business and financial services firms need to continually innovate to serve this key, growing market.

Policy Matters

The move to greater use of wireless devices is an indisputable trend—and one that needs to be supported by timely government action to ensure adequate spectrum is available to continue the rapid expansion of wireless services in response to consumer demand. In 2011, 31.6% of U.S. households had wireless telephone service only, compared to 17.5% five years earlier, according to a study by the Centers for Disease Control and Prevention (Blumberg, Luke, Ganes, Davern, Boudreaux, & Soderberg, 2011). The same study showed that a mere 11.2% had landlines only. The CDC also notes that among the 31.6% of households with wireless only, 40.8% are Hispanic, followed by 32.5% of African American households and 27.6% of Whites (Blumberg & Luke, 2011).

Higher adoption and use of more sophisticated wireless devices, including smartphones and tablets, are increasing demand for the spectrum needed to expand wireless capacity. While this usage is good news for the Hispanic population, it is a cause for concern that today, just 10% of U.S. spectrum is used to support wireless networks.

With this fast-rising usage and no new spectrum in the pipeline, the FCC anticipates that mobile spectrum demand could outstrip supply as early as next year. Without timely government leadership, consumers will face unreliable service and potentially higher connectivity costs. These negative outcomes would disproportionately harm the Hispanic population due to their heavy reliance on wireless connectivity.

Conversely, if government acts in the interests of consumers to make adequate spectrum available for wireless use, new economic opportunities await. It is estimated that the addition of 500MHz of spectrum capacity for mobile use will create 500,000 American jobs across the U.S. economy and contribute nearly \$400 billion to the nation's GDP. (The Analysis Group, 2011)

U.S. policies also must end regressive taxes for broadband users. Current tax policies at the federal, state and local levels are decades-old and were imposed at a time when access to communications technology was considered more of a luxury than a necessity. Consumer-friendly tax policies are needed to ensure that Hispanics, along with other minority and lower-income populations, can continue to afford wireless broadband services.

In conjunction with streamlined tax policies that would make broadband services affordable for Hispanics, Lifeline/Link-Up programs, which offer discounts to qualified, low-income wireless customers, should be continued. Federal Communications Commission policies in support of a wireless broadband, direct-to-consumer subsidy will provide immediate help for lower-income Hispanics to be able to afford subscriptions to wireless broadband services. These policies are essential to help Hispanics make a complete transition to mobile participation in the new American innovation economy.

The importance of affordable fees for wireless broadband access cannot be overemphasized. As noted in a recent study by former Clinton Administration economist Robert Shapiro and American Enterprise Institute economist Kevin Hassett, affordability is key to stimulating broadband adoption especially among lower-income consumers (Shapiro & Hassett, 2010). The significance of cost is particularly well illustrated by the statistics in the Nevada study cited earlier. In that study, 24% of adult Hispanics — nearly a quarter — said the monthly cost of broadband service was a barrier, compared to 17% of Nevada adults overall. At the same time, however, 55% also said they used a mobile device to access the Internet, compared with 46% of the state's adults overall (Technology Adoption Among Hispanics in Nevada, 2012) — yet another reminder of the value of *mobile* broadband to the Hispanic community.

The Obama Administration has recognized the need for increased investment in infrastructure and committed some economic stimulus funds to promote more widespread deployment and utilization of high-speed Internet. But clear policies that encourage continued investment and additional spectrum allocated for mobile use are needed. Because broadband access is closely aligned with economic opportunities and a wide array of social benefits, such as healthcare, education and government services, continued emphasis on the issue is essential for Hispanics today.

The changing demographic picture of the United States is no longer a speculative matter. It is happening, and happening quickly, with Hispanics and other so-called minorities rapidly becoming a collective majority. However, those groups continue to lag behind non-Hispanic Whites in educational attainment, income and wealth accumulation. If these groups will soon become the majority, it is in the country's interest to ensure that they arrive at that status unencumbered by those characteristics. Accomplishing that goal will require hard work from within those communities, but it will also require that government officials and business leaders examine policies that create unnecessary hurdles. One of the most important elements of this effort is mobile broadband, which is demonstrably an essential tool for Hispanics' advancement. Whether it is education, healthcare, civic engagement and access to government services or business and finance, mobile broadband access provides a pathway to information of all kinds. If that widely quoted piece of conventional wisdom — “information is power” — is true (and we believe it is), universal extension of mobile broadband must be a priority.

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