

Broadband Leadership Council

Representing Hot Springs
and Garland County

Key Participants

- **Community Organizations**
 - Chamber of Commerce
 - Metro Partnership
 - Hot Springs Fifty for the Future
 - West Central Arkansas Planning and Development District
- **Local Government (Both of which passed a resolution in support our efforts)**
 - City of Hot Springs
 - Garland County
- **Education**
 - ASMSA
 - HSSD
 - HSU
 - NPC
- **Commercial Interests**
 - Oaklawn Jockey Club
 - First72 Cyber
 - Hill & Cox
 - B&F Engineering
 - Keith Smith Company
 - Arvest Bank
 - BancorpSouth
 - Diamond Bank
 - First Security Bank

Principal Concerns

Deploying broadband infrastructure, services, and applications as well as supporting the universal adoption and meaningful use of broadband, are challenging—but required—building blocks of a twenty first century community. Broadband is not just a technology, it's a platform for economic opportunities. For businesses, broadband has become a driving force behind competitiveness, innovation, and efficiency. For a community, affordable, available access to broadband means the difference between thriving and becoming obsolete...

Thus, as broadband becomes a prerequisite for community and economic development, communities without competitively priced high-speed broadband access or a population with the skills to utilize broadband-enabled technologies are becoming increasingly isolated from the modern economy.

Broadband is defined using the current FCC standard of 25Mbps

Demographic Concerns

COUNTY US Census 2010	Garland (8) 96,024	Pulaski (1) 382,748	Benton (2) 221,339	Washington (3) 203,065
County Seat	Hot Springs	Little Rock	Rogers	Fayetteville
Higher Ed	NPC	UALR	NWACC	UA
Retirement Population	28,579	67,016	26,986	20,641
Percent 60+	29%	18%	12%	10%
GenX - Millennials	21,299	108,146	63,591	57,894
Percent 25-44	22%	28%	29%	29%
Bachelor's	20,340 21%	116,941 31%	62,933 29%	56,109 29%
Bachelor + Associate	29,021 30%	148,162 40%	79,159 36%	68,504 35%
Median Income	\$39,162	\$46,013	\$54,515	\$41,248
Manufacturing Jobs	2,354	14,095	9,418	12,310
Percent	3%	20%	14%	17%

Demographic Trends

Trends – 1980 to 2015

- Age 60+ - 29K
- Up 25% to 30%
- Rank - 1st
- Age 25-44 - 22K
- Down 30% to 22%
- Rank - 10th



Economic Concerns

- **Classic Chicken and Egg problem.**
 - Without competitively priced high-speed reliable commercial broadband available, we are unable attract 21st century employers.
 - Without 21st century employers, carriers will not invest in infrastructure to provide this service at a competitive price.
 - Without 21st century employers or infrastructure we can't attract millennial workers which further limits the attractiveness for employers seeking to locate in the area.

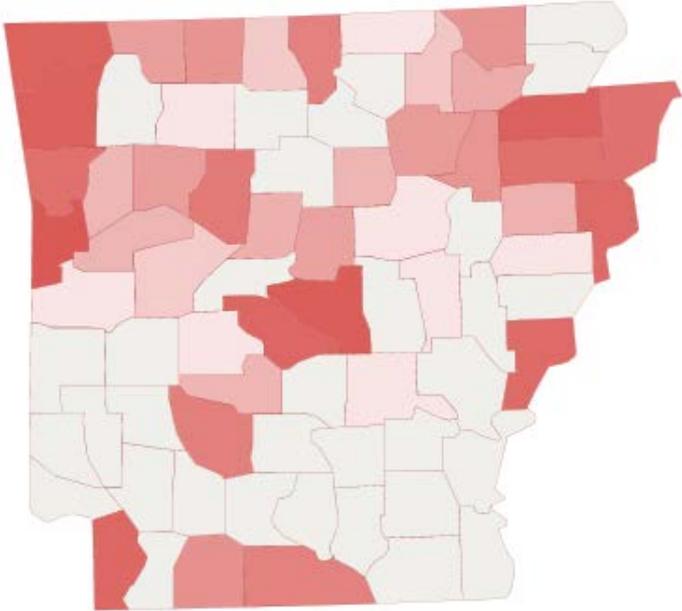
Key Findings

(Over the last 15 months)

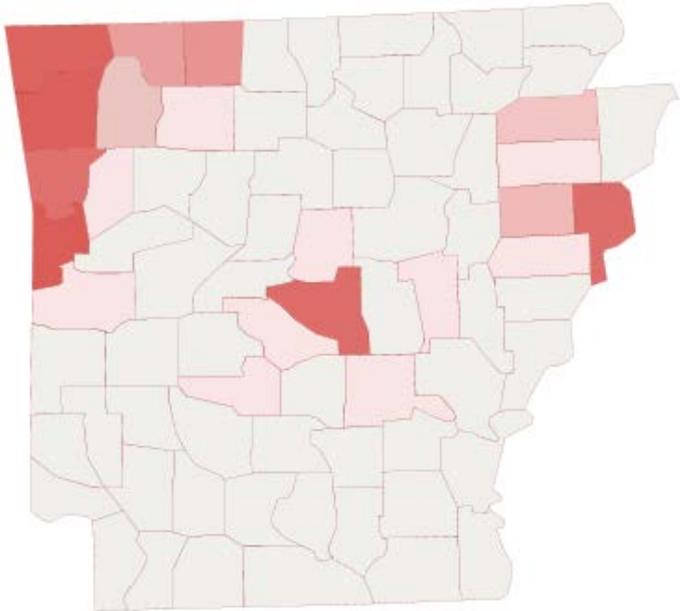
- Out of 100 state congressional districts we are 78th in broadband availability.
 - Residents with at least 25 Mbps connection
 - Pulaski County 93.9%
 - Saline County 88.1%
 - Clark County 74.3%
 - Hot Springs Co. 42.9%
 - Garland County 09.0%
 - Arkansas as a whole ranks 48th in the nation (leading only Vermont and Montana)
- When polling our membership we found that the prices paid for identical service varied wildly among private companies, even from the same carriers.
- We also found that public and non-profit entities were often charged more than private companies for the same service.
- We found that commercial grade service was offered in competing communities throughout the state at higher speeds and lower prices. We also found that competing markets outside the state had an even greater advantage.
- We found that reliability was a broad complaint among both residential and commercial users in both the city and the county.
- We found that coverage was also a persistent complaint with anecdotal incidents of service dead-spots and large upfront construction costs quoted.

Density Map for Broadband

25Mbps



100Mbps



Barriers to Progress

- Limited Competition among residential and commercial providers
- Waiting for court challenges to a few key FCC policies to play out nationally
 - Laws against municipalities entering the market as providers were invalidated by FCC, but challenged in court
 - Arkansas has an existing law that would be prohibited by the above referenced FCC rule—but still being enforced.

Potential Solutions

- A dig-once policy that could lay conduit and provide leasable space to carriers trying to enter the market in the future.
 - The state could lay conduit when digging up highway 70 and other pending road projects
- Broadband availability needs to be considered in the planning of all relevant state and local agencies.
- A funded incentive program to attract 21st century business to this region.
- Find carriers willing to offer 1G speeds at competitive pricing (same rates as Little Rock, NW Arkansas) in the following development areas
 - Mid-America Industrial Park
 - Airport Industrial Zone
 - Downtown Hot Springs

Our Long Term Goal

We want to be able to brand Hot Springs and Garland County as:

“A 1 Gig Community,
Open for Business”