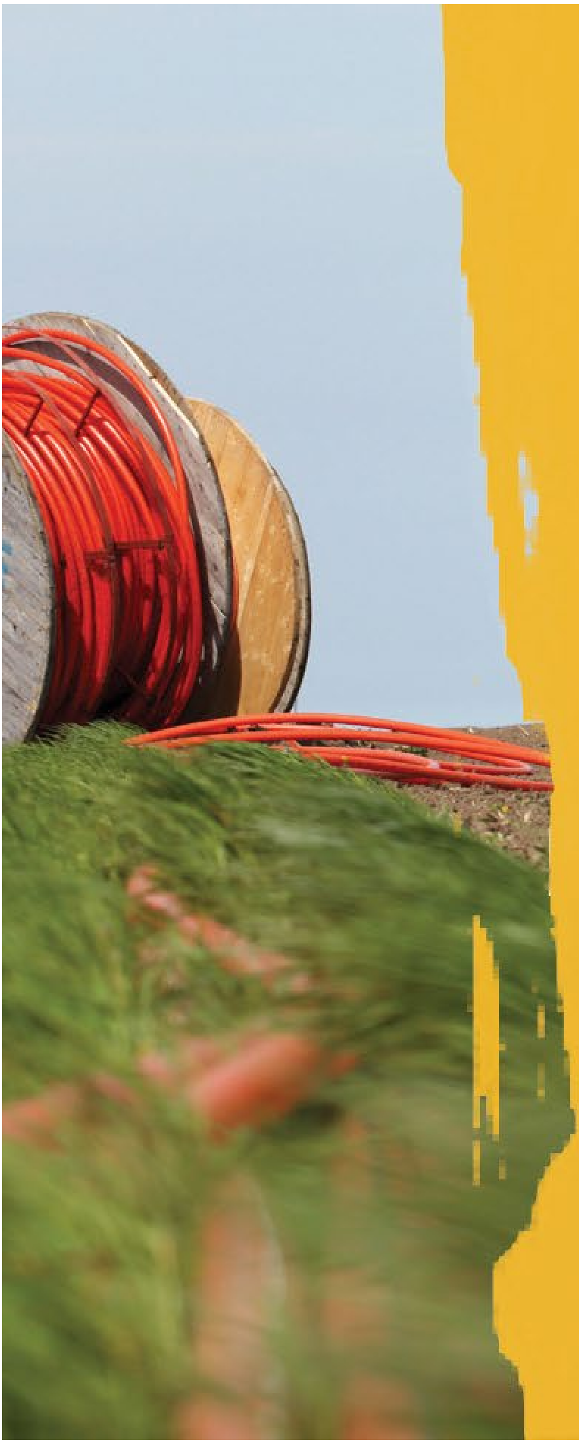

2023 Missouri Internet Survey Report

CONNECTING ALL MISSOURIANS
Office of Broadband Development

Extension
University of Missouri

Exceed

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Acknowledgments

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This report was authored by Alan Spell, Assistant Extension Professor with the University of Missouri Extension Exceed Program. The author would like to thank the following organizations and individuals for their guidance, critical outreach support and contributions to the survey analysis and reporting:

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Executive Summary

As part of a planning grant, the **2023 Missouri Internet Survey** will assist the state in utilizing forthcoming broadband funding to more effectively bring the benefit of broadband service to all Missourians. To achieve the goal of universal broadband access and digital equity in Missouri, state and local planners need input from citizens and organizations statewide. Coupled with other information-gathering activities facilitated by the grant, this survey provides valuable insights and benchmark information as historic investments in broadband expansion and digital inclusion efforts begin in earnest.

Over 7,500 completed surveys from a random sampling of Missouri households were received during the spring of 2023. The survey sought input from all Missourians and gathered responses from smaller populations whose voices can be underrepresented in surveys and have been disproportionately impacted by digital inequity.

Key survey findings across three major themes include:

INTERNET SERVICE ACCESS AND ADOPTION

- **Most respondents (88%) used a personal computer** at home. That is important, as these devices are critical to gaining the full benefits of internet adoption.
- **Low-income** and **employment-challenged** households had the lowest levels of personal computer use (78% and 75%, respectively) and the highest levels of smartphone-only use (12% and 9%, respectively) compared to the survey average (6%).
- A high percentage (87%) of respondents paid for home internet service. **Low-income** and **smartphone-only** households were least likely to pay for service (78% and 52%, respectively). Smartphone-only respondents also tend to be lower income. Respondents in low broadband access areas, or **rural low-access** households, were less likely to pay for home internet as service was not available (82%).
- **Only 4% of respondents chose not to purchase available internet services**, an important finding that services are in very high demand.
- The primary reason for not purchasing available services was cost (67%), followed by the internet being too slow or unreliable (32% and 30%, respectively). Slow or unreliable internet was more of an issue for **rural low-access** households, as over half indicated these were contributing factors in not purchasing services.
- Six out of ten respondents had broadband internet speed service (59%). Broadband service – either cable, fiber optic or digital subscriber line (DSL) – was least available to respondents in **rural nonmetro** and **low-access** areas (47% and 33%, respectively).
- **Rural nonmetro** and **low-access** households were most likely to have **satellite subscriptions** (22% and 34%, respectively) compared to other respondents.
- Four out of ten respondents spent $75 or more per month on internet services (44%), but fewer **low-income** households paid this much (36%). **Rural low-access** households had the largest share of respondents paying $75 or more a month (59%), due to the need to purchase more costly satellite subscriptions for internet access.

- Most respondents indicated one or more challenges – such as unreliable service – with their home internet (73%). Fiber optic subscribers noted the fewest challenges (41%) while nine out of ten satellite subscribers reported at least one challenge.

INTERNET ACTIVITIES

- **Three out of four** respondents used the internet for at least one work activity (76%). Nearly half of all respondents worked remotely at least one day a week (48%).
- **Non-White** households indicated higher levels of remote work (55%) than **White** households (49%) and were more likely to do online training or job searching activities.
- Most respondents used home internet for email (99%), online shopping (96%) and banking or paying bills (93%).
- Seven out of ten households with internet used it to access government or health services (72%), and just over half used it for education needs (54%).
- **Smartphone-only** respondents were much less likely to use their home internet for work activities or to access government, health or education resources than other respondents.

INTERNET ASSISTANCE AND CONCERNS

- Over half of respondents indicated an interest in at least one area of internet training or assistance (56%). Seven out of ten **low-income**, **Non-White** and **employment-challenged** households were interested in at least one area of training or assistance.
- Help **finding information and resources I can trust** (33%) and **assistance with setting up or using new devices** (28%) were the top two topics of interest.
- Nearly six out of ten respondents would use **online resources** for internet or device assistance (58%). As the top choice, it underscores the need for households to have high-quality internet service and devices they can use to access resources.
- One in four respondents were likely to go to **local government** institutions (i.e., libraries and schools) for assistance. Local government resources were significantly more important to **Non-White** and **employment-challenged** households.
- Eight out of ten respondents indicated the **security of their personal information** as their top concern. Over half of respondents were concerned about **misleading information** (56%).

The **2023 Missouri Internet Survey** clearly shows that demand for internet services is high, with only 4% of respondents not purchasing available services. While rural low-access households typically pay the most for services, they also have the greatest challenges in terms of internet speed and reliability.

Lower-income respondents, including **low-income, smartphone-only** and **employment-challenged** households, have decreased levels of internet access. Those that have service typically use it less for online activities and are more interested in internet-related training and assistance.

Introduction

Missouri is poised to make historic investments in broadband infrastructure, making the present moment critical for understanding internet service and digital equity challenges. Access to reliable and affordable broadband service is a universal need and, when coupled with a digitally skilled citizenry, benefits the individual and community alike. Previous research on the benefits of broadband expansion shows that access to broadband is critical, but economic gains are dependent on people, of all backgrounds, adopting and using the technology to better their personal and work lives.[1]

The **2023 Missouri Internet Survey** provides insight into the infrastructure and digital needs of Missourians and will serve as a benchmark for measuring progress as broadband investments are implemented to benefit every corner of the state.

This report summarizes survey results across three major themes: internet service access and adoption, internet activities and internet assistance and concerns. In addition to the report, an appendix provides details regarding the survey questions, one-page summaries for eight **focus populations** (selected specifically as groups disproportionally impacted by digital inequity) and tables noting responses from focus populations and other sub-population groups.

Survey Methodology

The online survey of 23 questions was developed to collect anonymous input from Missouri adults during the spring of 2023. A review of other internet service and digital capital household surveys informed the development of these questions to ensure important data was collected while the survey remained smartphone-friendly to improve outreach to households without home internet service.[2] A Spanish-language version was also made available. The recruitment material – including a postcard and flyers – and survey were approved by the University of Missouri's Institutional Review Board. Appendix A provides the survey questions.

An important aspect of this survey was the need to gather enough representative samples from eight focus populations, designated by the Digital Equity Act, to ensure their feedback could be included in this report. Many of these groups – such as formerly incarcerated individuals – are relatively small populations making it difficult to achieve a high number of random responses. To achieve a sufficient level of responses for these focus populations, several concurrent activities were taken by the University of Missouri and other organizations supporting this effort:

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[1] A large body of economic literature, including key causal research on rural economic growth due to broadband and other resources noted in two Missouri studies, describes the impacts of broadband expansion that is driven by increased internet access, adoption, and use.

[2] A well-designed digital capital survey, created by the Purdue Center for Regional Development and the Southern Rural Development Center, was shared by Dr. Roberto Gallardo and served as an important resource in question development (see Understanding the Digital Equity Landscape for information on their survey findings).

- 80,000 postcards with QR codes were mailed by the University of Missouri to random Missouri households, with oversampling used to increase mailings to zip codes where a higher proportion of focus population households resided.
- Social media outreach from the University of Missouri Extension Program, Missouri Department of Economic Development, Missouri Governor's Office, the Missouri Chamber of Commerce, and other organizations helped tremendously in raising public and media awareness.
- The University of Missouri Extension, regional planning commissions, and several state agencies, notably the Department of Social Services and Corrections, used newsletters and e-mails to raise awareness and to pass along a flyer that could be posted at organizations or stores to increase survey visibility.

This multi-pronged approach was critical to reaching Missourians across the state and resulted in over 8,700 individuals starting the survey with 7,504 completing it (86% completion rate). The large response level provided enough information to report figures for the eight focus populations along with many other sub-populations (see Appendix B for response tables for each question).

Like many random surveys, the population of respondents rarely mirrors the overall population in terms of age, income, race and education levels. Respondents to this survey were generally more high-income, older, white, educated, and rural than the overall population (see Exhibit 1).

While the survey response levels for different sub-populations were sufficient for reporting, and focus population outcomes were necessary, weighting was used to

Exhibit 1. Missouri Internet Survey Respondent and Census Distributions

Survey and Census Distributions		
Groups	**Survey**	**Census**
Household Income		
Less than $35,000	18%	28%
$35,000 to under $74,999	31%	31%
$75,000 to under $99,999	19%	13%
$100,000 or more	32%	27%
*Respondents (N)**	*6,022*	
Age		
18-34	11%	22%
35-64	59%	38%
65 and over	30%	17%
*Respondents (N)**	*7,231*	
Race or Ethnicity		
White, alone	91%	80%
Non-White	9%	20%
Black or African American, alone	4%	11%
Hispanic, Latino, or Spanish origin	2%	4%
*Respondents (N)**	*6,930*	
Educational Attainment		
High school degree or less	12%	40%
Some college or AA degree	31%	30%
Bachelor's degree or above	57%	31%
*Respondents (N)**	*7,288*	
Area		
Metropolitan Counties	59%	87%
Nonmetropolitan Counties	41%	13%
*Respondents (N)**	*7,377*	
Higher Access: > Half of Served Locations with 25/3+ Mbps	86%	95%
Low Access: < Half of Served Locations with 25/3+ Mbps	14%	5%
*Respondents (N)**	*7,504*	

**Respondents who did not give an answer are not shown* adjust the overall respondent percentages to better reflect a survey average representing Missouri's population distribution. Household income weights were used to adjust the survey average which increased the influence of lower-income respondents because their responses typically differed significantly from other populations. Lower-income respondents were also more representative of Missouri's citizens in terms of race and educational attainment.

The survey results in the next section are presented under three major themes:

Internet Service Access and Adoption

The internet services section asked questions regarding the devices and internet services respondents used at home. It included questions on internet access and adoption, the cost and types of home internet services, willingness to pay for devices and services and home internet challenges.

Internet Activities

The internet activities section asked questions about the use of home internet for **work** or **other activities** for those with and without internet services. Comparing the activities of respondents with internet access to the desired uses of respondents without access shows where expectations differ from reality.

Internet Assistance and Concerns

The internet assistance and concerns section asked questions about internet, device or resource training or assistance interest. Another question asks where respondents would likely go for internet or device assistance. A final question asks about concerns respondents have with internet usage.

A noted earlier, the appendix provides additional details regarding the survey questions, one-page summaries for eight **focus populations** (selected specifically as groups disproportionally impacted by digital inequity) and tables noting responses from these focus populations and other sub-population groups.

Missouri Internet Survey Results

Internet Service Access and Adoption

Internet Device Usage

The first question asked about devices used in the home to understand how respondents access the internet (see Exhibit 2).

Nearly all respondents had a smartphone (96%) and most had either a laptop or desktop computer (88%). Having a personal computer is important for households to take better advantage of the benefits of home internet service[3]. Activities such as reading, file transferring, spreadsheet and word processing, and form completion are more easily accomplished on a personal computer.

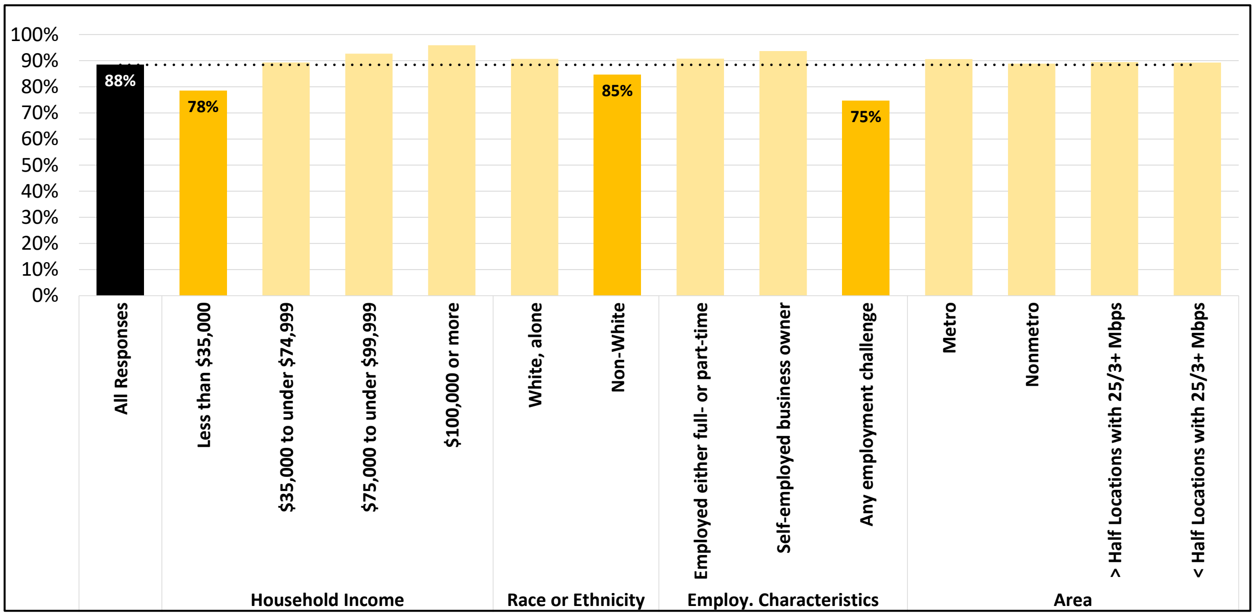
Exhibit 2. Which of the following devices are used in your home?

Device	Percent
Smartphone	96%
Personal Computer (laptop/desktop)	88%
Other (smart TV, gaming console)	70%
Tablet	64%
None	0.3%

N = 8105. Response weighted by household income.

While most respondents had a personal computer, lower-income households were less likely to own such devices (see Exhibit 3). Low-income households – defined here as households with less than $35,000 in income – and those with employment challenges had lower personal computer ownership levels (78% and 75%, respectively). Non-White households were also less likely than the survey average to have a personal computer (85%).

Exhibit 3. Have a Personal Computer (Laptop/Desktop) at Home, by Selected Groups



[3] Studies from the Pew Research Center and a Purdue/Southern Rural Development Center Survey provide additional insights on the challenges smartphone-only individuals face by accessing the internet solely through these devices.

Smartphone-only households were defined by respondents with only a smartphone or those with a smartphone and other devices (smart TV, gaming console, etc.). Other devices included as entertainment-only equipment would not provide the beneficial capabilities of a personal computer.

When weighted by household income, only a small portion of respondents were smartphone-only households (6%). Exhibit 4 shows selected demographic characteristics of smartphone-only respondents compared to those who had a personal computer or tablet. Four in ten smartphone-only respondents had a household income below $35,000 (42%), compared to all Missouri households classified as low-income (28%).

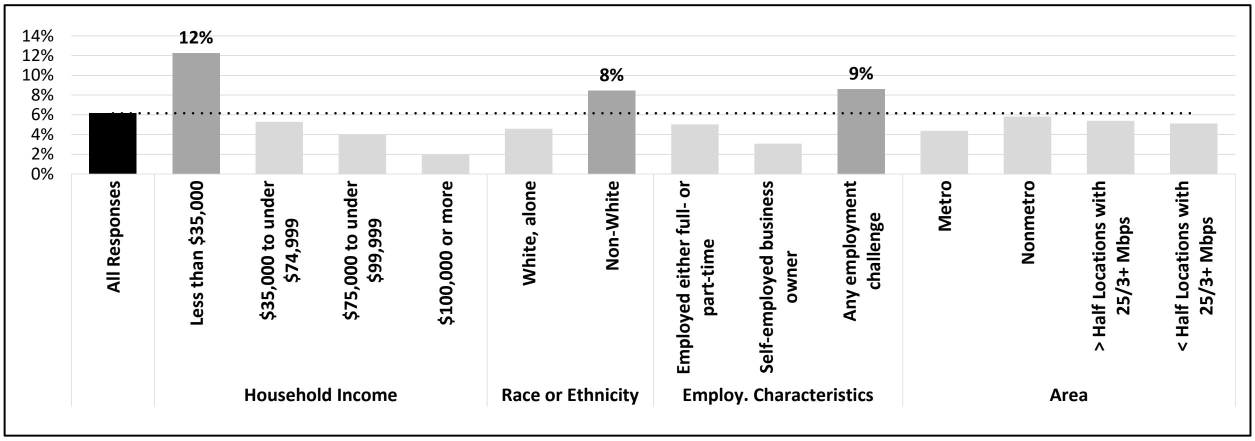
Exhibit 5 shows that households that were either low-income (12%), had an employment challenge (9%), or were Non-White (8%) had a greater percentage of smartphone-only respondents compared to the survey average (6%).

Exhibit 4. Demographic Profiles of Smartphone-Only & Personal Computer/Tablet Respondents

Groups	Smartphone Only	Personal Computers/ Tablets
Respondents	434	7,623
Household Income		
Less than $35,000	42%	17%
$35,000 to under $74,999	31%	31%
$75,000 to under $99,999	15%	20%
$100,000 or more	12%	33%
Age		
18-34	14%	11%
35-64	63%	59%
65 and over	23%	30%
Race or Ethnicity		
White, alone	85%	92%
Non-White	15%	8%
Black or African American, alone	8%	4%
Hispanic, Latino, or Spanish origin	3%	2%
Educational Attainment		
High school degree or less	25%	11%
Some college or AA degree	45%	31%
Bachelor's degree or above	30%	58%
Area		
Metropolitan Counties	52%	59%
Nonmetropolitan Counties	48%	41%
Higher Access: > Half of Served Locations with 25/3+ Mbps	87%	87%
Low Access: < Half of Served Locations with 25/3+ Mbps	13%	13%

Note: Respondents who did not give answers to the questions are not shown

Exhibit 5. Smartphone-Only Respondents, by Selected Groups



Internet Access and Adoption

Exhibit 6 shows that over eight out of ten respondents paid for a home internet service (87%). Of those who did not pay (13%), nearly one-tenth of respondents either did not have internet service available for purchase or did not know if it was available (9%).

Only 4% of respondents chose not to purchase available services, an important finding that internet services are in very high demand.

Exhibit 6. Did you pay for a home internet subscription at any time over the past 12?

Answer	Percent
Yes	87%
No	13%
Internet service not available	7%
Chose not to purchase	4%
Do not know if available	2%

N = 8089. Response weighted by household income.

The three least likely groups to buy internet services were households that were low-income (78%), lived in rural low-access areas – defined here as zip codes where less than half of served locations have at least 25/3 Mbps service – (82%), or were smartphone-only users (52%). It is interesting that just over half of smartphone-only respondents did purchase internet services at some time in the past 12 months, perhaps to use with entertainment-only devices.

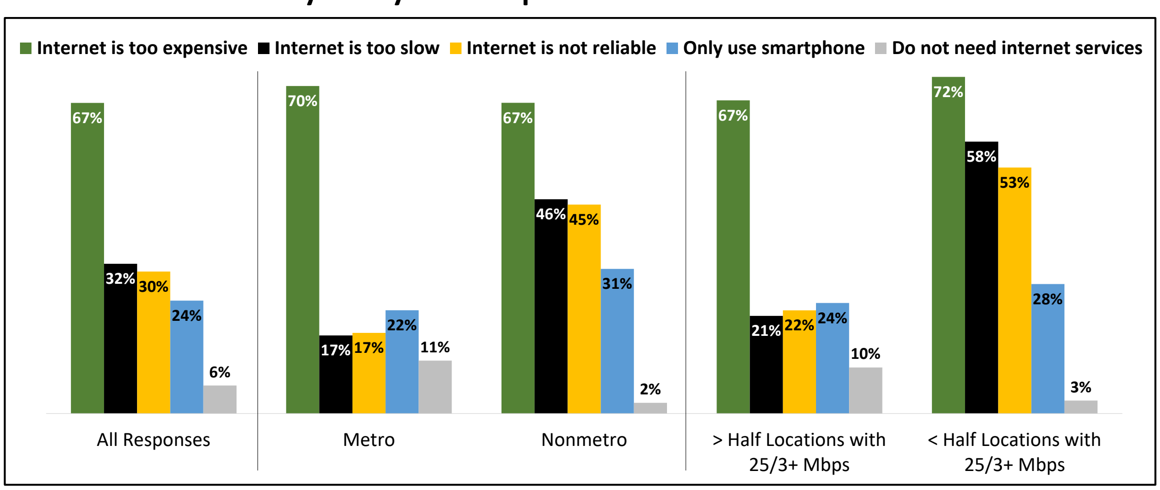
Exhibit 7. Groups Least Likely to Have an Internet Subscription

Answer	Households Less than $35,000	< Half Locations with 25/3+ Mbps	Smartphone Only
Yes	78%	82%	52%
No	22%	18%	48%
Internet service not available	9%	13%	23%
Chose not to purchase	10%	3%	18%
Do not know if available	3%	2%	6%

Of those who did not purchase internet services in Exhibit 7, some smartphone-only and low-income households chose not to purchase services likely due to their financial situation (18% and 10%, respectively). Lack of availability explains why some smartphone-only and rural low-access households could not purchase services (23% and 13%, respectively).

If internet was available, the primary reason for not purchasing services was due to cost (67%), as shown in Exhibit 8. Over half of rural low-access areas respondents also indicated slow or unreliable internet as a reason not to purchase services.

Exhibit 8. Why did you not purchase home internet services?



Types of Home Internet Service and Cost

Exhibit 9 shows that most respondents with home internet services had a cable (25%) or fiber optic (18%) subscription. However, the most prevalent service varied by location. Rural nonmetro and low-access households were most likely to have a satellite subscription followed by a digital subscriber line (DSL) subscription (22% and 34%, respectively).

Exhibit 9. What type of home internet service did you subscribe to?

Area	Cable	Fiber optic	DSL	Satellite	Cell plan or hotspot	Other Types	Do not know
All Responses	**25%**	**18%**	**16%**	**14%**	**9%**	**8%**	**10%**
Metro	32%	22%	14%	9%	7%	5%	11%
Nonmetro	14%	13%	20%	22%	12%	12%	7%
> Half Locations with 25/3+ Mbps	28%	21%	15%	11%	9%	7%	10%
< Half Locations with 25/3+ Mbps	5%	4%	24%	34%	14%	13%	6%

Broadband internet speeds, at least 25 Mbps download and 3 Mbps upload, are traditionally available in either cable, fiber optic or DSL services – see MU Extension Broadband Technologies Guide for additional details. Based on this definition, most respondents had a broadband subscription (59%). More than two-thirds of metro respondents (68%) had broadband service compared to less than half of rural nonmetro respondents (47%). Only one in three rural low-access households had broadband service (33%).

The survey asked respondents to provide their monthly cost of internet service and to indicate if that cost included bundled services, such as television channels. Most respondents paid between $50 and $75 a month for internet-only services (39%), which excludes bundled service responses (see Exhibit 10).

The monthly internet-only cost varied by different groups based on willingness to pay for higher-speed service levels or the type and availability of services in an area. For example, four out of ten respondents spent $75 or more per month on internet services (44%), but fewer low-income households paid this much (36%). On the next page, Exhibit 11 illuminates these differences.

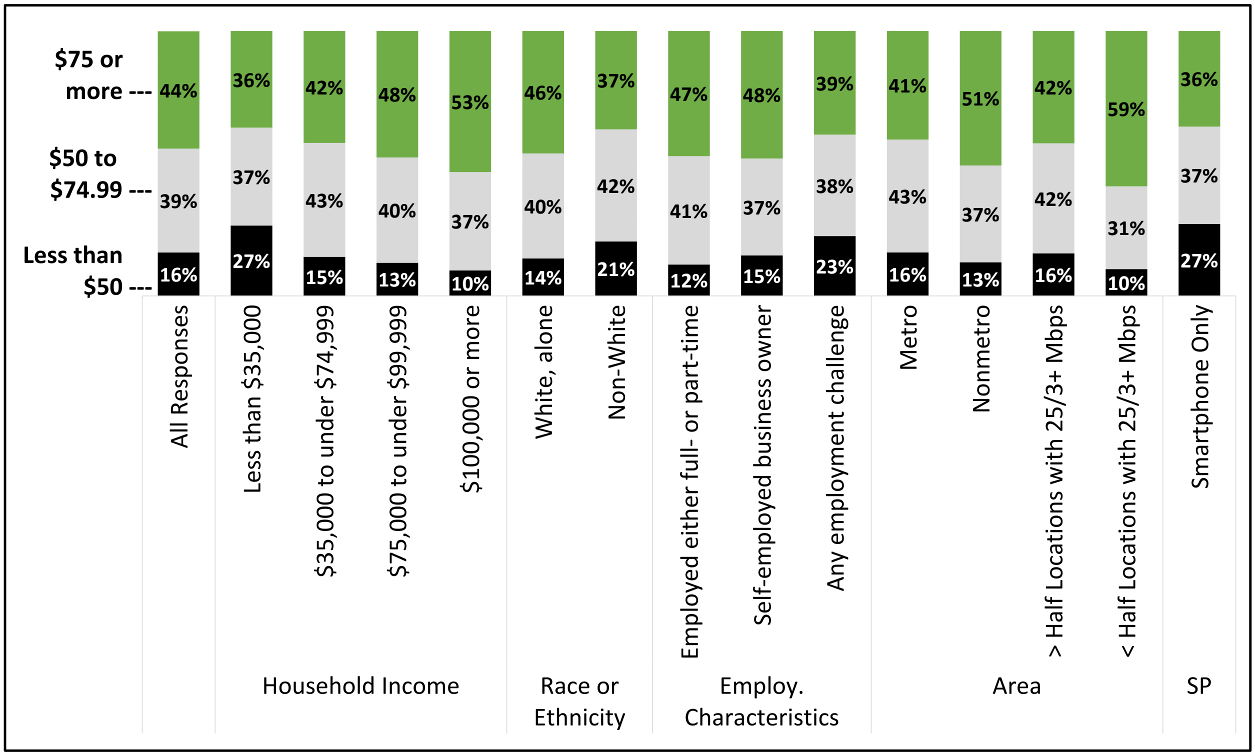
Exhibit 10. What is your monthly internet cost?

Monthly Cost	Percent
Less than $25	3%
$25 - $49.99	14%
$50 - $74.99	39%
$75 - $99.99	25%
$100 or more	19%

N = 4473 respondents with internet-only cost. Response weighted by household income.

Conversely, more than half of households with $100,000 or more in income paid at least $75 a month for internet services (53%). Rural low-access households had the largest share of respondents paying $75 or more a month (59%).

Exhibit 11. Monthly Internet Cost, by Selected Groups



Because respondents provided prices ranges, typical monthly costs were calculated for different types of internet services; this allowed for an easier method to compare relative prices paid. Typical costs were calculated by taking the median value of each range and multiplying it by the number of respondents in that price range to create an average. Using this method, the typical service cost was $71 a month (Exhibit 12). Satellite subscribers paid the highest cost ($87), while DSL users paid the least ($64).

Rural low-access households paid the highest cost ($79) of any population group, which is impacted by the larger share of respondents that purchased satellite services (34%) compared to the survey average (14%). Rural nonmetro households paid more than metro residents ($75 and $70, respectively). Households with $100,000 or more in income paid $76 a month, the second highest of any population group, likely due to their choice of higher-speed internet services.

Conversely, Non-White and low-income households typically paid less ($67 and $65, respectively), likely reflecting their choice for lower internet service speed options.

Exhibit 12. Typical Cost by Service Type

Type of Service	Monthly Cost
All Responses	$71
Satellite	$87
Cable	$73
Fixed wireless antenna	$72
Cellular data plan or hotspot	$68
Fiber optic	$67
DSL	$64

N = 4060 respondents answering for type of service and internet-only cost, not bundled packages. Only types with at least 250 responses are shown.

Internet Service Challenges

Households that paid for home internet services were asked if there were challenges to using that service. Most respondents indicated one or more challenges (73%), with fiber optic subscribers noting the fewest challenges (41%) as shown in Exhibit 13. In contrast, nine out of ten satellite subscribers reported at least one challenge (92%).

Just under half of all respondents indicated that the internet was too expensive (46%). This was the most reported challenge and mirrored the primary reason households chose not to purchase available internet service (see Exhibit 8 on a prior page). However, it is true that less than half of households noted cost as an issue with the exceptions of cable (50%) and satellite subscribers (64%).

Slow or unreliable internet was a challenge for some respondents (42% and 40%, respectively). These challenges varied by service type. Less than one in four fiber optic or cable respondents noted slow internet as a challenge, compared to at least six in ten respondents with other services. Similarly, internet reliability was more challenging for non-fiber optic or cable subscribers.

Exhibit 13. Any challenges to using the home internet?

Challenges	All Responses	Fiber optic	Cable	DSL	Satellite	Cellular plan	Fixed wireless antenna
Reported a challenge	**73%**	**41%**	**65%**	**86%**	**92%**	**85%**	**84%**
Internet is too expensive	46%	30%	50%	39%	64%	45%	38%
Internet is too slow	42%	12%	23%	65%	72%	64%	60%
Internet is not reliable	40%	13%	27%	55%	62%	59%	58%
No challenges	27%	59%	35%	14%	8%	15%	16%

N = 6912 respondents. Challenges do not total 100% as respondents could choose more than one issue.

Willingness to Pay for Internet Services and Devices

As noted earlier, the expense of internet services is a primary challenge or barrier to household adoption. One question asked what respondents, currently without home internet, would be willing to pay for monthly services (see Exhibit 14).

One in twenty respondents indicated they were not willing to pay for any internet service regardless of price (4.7%), but most respondents were willing to pay between $25 and $75 for service (55%).

Exhibit 14. What would you be willing to pay for monthly internet that meets your needs?

Cost	All Responses	Metro	Nonmetro	> Half Locations with 25/3+ Mbps	< Half Locations with 25/3+ Mbps
Less than $10	**7.0%**	11.2%	3.9%	9.7%	2.0%
$10 - $25	**14.8%**	18.7%	12.5%	15.2%	18.2%
$25 - $49.99	**27.0%**	25.6%	33.1%	29.4%	26.3%
$50 - $74.99	**27.6%**	21.6%	29.6%	22.4%	35.4%
$75 - $99.99	**12.1%**	7.3%	12.9%	9.9%	12.1%
$100 or more	**6.7%**	5.1%	5.7%	5.2%	5.1%
Not willing to pay	**4.7%**	10.6%	2.2%	8.2%	1.0%

N = 963 respondents.

Typical monthly costs were calculated to more easily compare the relative willingness to pay for services. This cost was calculated by taking the median value of each price range, including respondents not willing to pay any amount ($0), and multiplying it by the number of respondents in that range to create an average. While this analysis creates a more conservative estimate, it aids in the understanding of relative differences in willingness to pay for internet service.

Respondents without internet services were typically willing to pay $48 a month for service. Low-income and smartphone-only households were willing to pay $28 and $32, respectively. Conversely, households with $100,000 or more in income were willing to pay $63 for internet services that met their needs. Metro area households were less willing to pay ($38) compared to nonmetro respondents ($50), perhaps due to higher service cost expectations in rural areas.

One question asked respondents what they were willing to pay to buy or replace a laptop, desktop or tablet to better understand potential ownership barriers given the advantages that devices have for accessing the broader benefits of home internet service.

Exhibit 15 shows that just over one in four respondents are willing to pay between $250 to $499 for a laptop, desktop or tablet (27%). Only a small portion of respondents were not willing to pay for these devices (6%).

Exhibit 15. What would you be willing to pay to buy or replace a laptop, desktop, or tablet?

Amount	Percent
Not willing to pay for these devices	6.2%
Less than $100	7.2%
$100 - $249	19.9%
$250 - $499	27.1%
$500 - $749	16.8%
$750 - $999	10.2%
$1,000 or more	12.6%

N = 8066. Response weighted by household income.

As with other cost questions, a typical amount was calculated to better compare relative differences in the willingness to pay for a device. Respondents were typically willing to pay $460 to buy or replace one of these devices (see Exhibit 16).

Unsurprisingly, groups with a greater willingness to pay (more than $500) are households with higher income levels, educational attainment or employment. Conversely, smartphone-only and low-income households were not willing to pay more than $247 and $300, respectively. A nearly $400 range separates the lowest to highest willingness-to-pay population groups.

Exhibit 16. Typical Amount Willing to Pay to Buy or Replace a Laptop, Desktop, or Tablet, by Selected Groups

Group	Amount
All Responses	**$460**
Top 5 Groups by Highest Willingness to Pay	
Household Income (HH) of $100K or More	$625
Bachelor's degree or above	$551
Self-employed business owner	$548
HH Income of $75K-$99K	$513
Employed either full- or part-time	$506
Top 5 Groups by Lowest Willingness to Pay	
Any Employment Challenge	$347
High school degree or GED	$337
HH with person that has been homeless	$314
Less than $35K HH Income	$300
Smartphone Only	$247

Note: Only groups with at least 200 responses.

Internet Activities

Work Activities of Households with Home Internet

The survey asked respondents with home internet service about their internet use for work activities, especially given the importance of remote work capabilities during and after the pandemic.

Three out of four respondents used the internet for at least one work activity (76%). Around half of all respondents teleconferenced or worked remotely at least one day a week (see Exhibit 17). One out of three survey respondents used the internet to search and apply for a job.

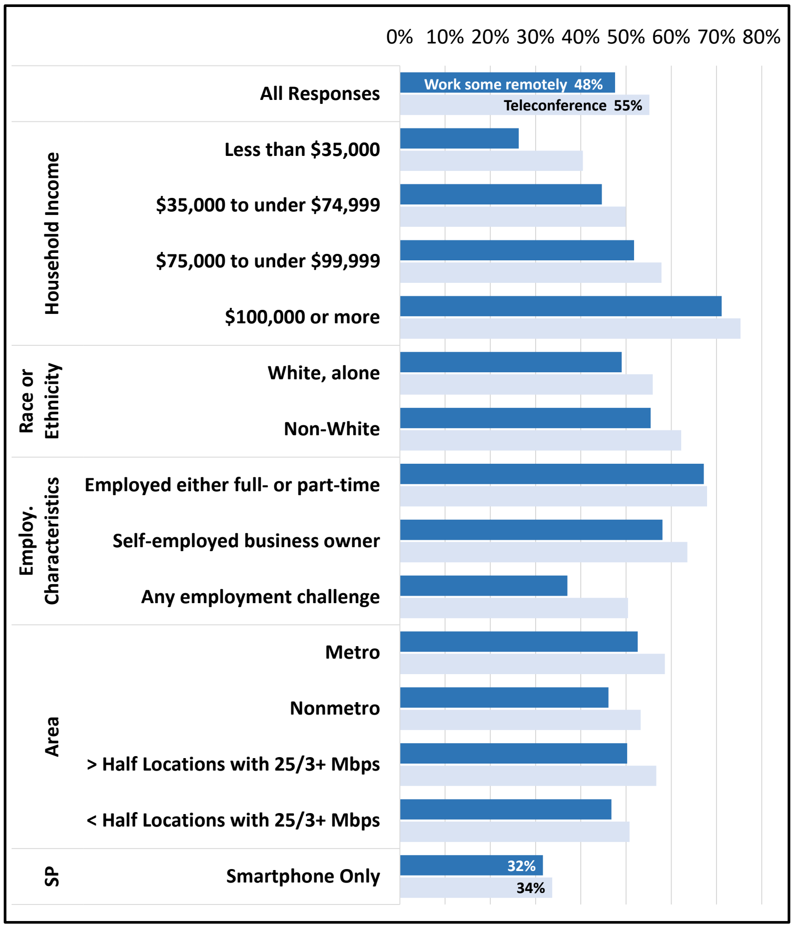
Exhibit 17. Have you or others in your household used the internet at home for the following work activities in the past 12 months?

Work Activity	Percent
Teleconference (i.e. Zoom)	55%
Work remotely at least one day a week	48%
Online training courses	44%
Search and apply for a job	32%
Running my business	22%
Did none of these work activities	24%

N = 6610. Response weighted by household income.

The share of remote work and teleconferencing respondents increased with household income (see Exhibit 18). For example, most households with income above $100,000 worked remotely at times (71%) compared to only one-fourth of low-income households (26%). Teleconferencing generally increased along with remote work activities.

Exhibit 18. Used Internet for Remote Work or Teleconferencing at Home, by Selected Groups



Smartphone-only respondents, who are typically low-income, were the least likely to remote work or teleconference.

Non-White households indicated higher levels of remote work (55%) than White households (49%). On average, rural nonmetro and low-access households were five percentage points less likely to do remote work or teleconference from home.

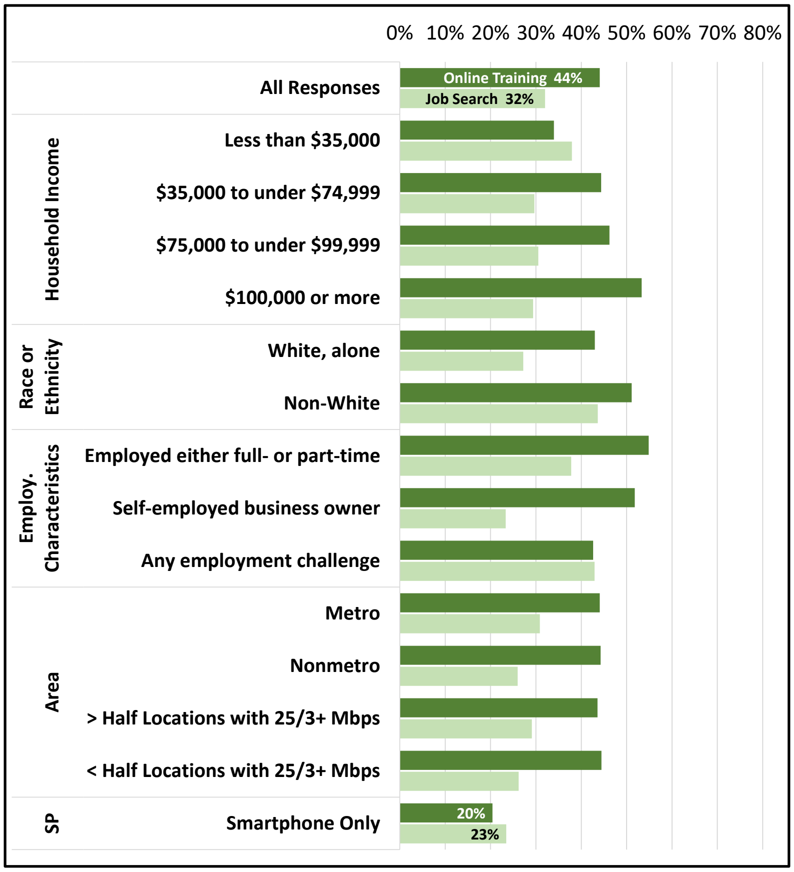
The prevalence of taking online training courses and searching for jobs also differed across population groups. Not unexpectedly, online training activities increased with household income, while job searching declined (see Exhibit 19).

With less than one-fourth of respondents doing online training or job searching, smartphone-only households were again the least likely of all population groups to do these work activities.

There was no difference in the prevalence of online training (44%) for rural and nonrural households, but rural nonmetro and low-access households were slightly less likely to search for jobs online.

Non-White households were more likely to do online training (51%) and job searching (44%) than White households (43% and 27%, respectively).

Exhibit 19. Used Internet for Online Training or Job Searching at Home, by Selected Groups



Just over one in five respondents indicated that they used the home internet for running a business, which could include selling online or gig work (22%). Understandably, self-employed business owners were highly likely to run business operations from home (72%), as shown in Exhibit 20.

A higher percentage of households with limited English abilities (33%) or a formerly incarcerated person (30%) were more likely to run a business from home than the survey average. While these percentages had a higher margin of error, between seven to nine points due to fewer responses, it is likely that these populations rely on self-employment more so than others given the challenges they face finding traditional employment.[4]

Exhibit 20. Run a Business using a Home Internet, by Selected Groups

Group	Percent
All Responses	**22%**
Highest Percentage to Run a Business at Home	
Self-employed business owner	72%
HH with a person with limited English*	33%
HH with a formerly incarcerated person*	30%
Lowest Percentage to Run a Business at Home	
65 and over	15%
Black or African American, alone	14%
Smartphone Only	11%

HH is Households. * denotes groups with higher margins of error (7-9%).

[4] Analysis of formerly incarcerated and immigrant entrepreneurship, along with a larger body of research, support this assumption.

Work Activity Expectations of Households without Home Internet

Households without home internet were asked about work activity expectations once they had this service (see Exhibit 21). Comparing the activities of respondents with internet access to the desired uses of respondents without access shows where expectations can differ from reality.

Most respondents without service anticipated the ability to teleconference, work remotely and search for jobs at comparable percentages to households with internet service. Using the internet for online training was an expectation of over half of respondents without service (51%), yet fewer than half of respondents with service did this work activity (44%).

Exhibit 21. Work Activity of Households with Internet (Actual) Compared to Expected Activities of Households without Internet

Work Activity	Actual Work Use	Expected Work Use
Teleconference (i.e. Zoom)	55%	50%
Work remotely at least one day a week	48%	52%
Online training courses	44%	51%
Search and apply for a job	32%	32%
Running my business	22%	38%
None of these work activities	24%	21%

Households without internet service were much more hopeful that they could run a business from home (38%), compared to households with service (22%). While expectations to run a business – whether selling things online for extra income or being self-employed – are overly optimistic, it shows an interest that can inform training and benefit local economies as residents bring in extra income from operating businesses from home.

Other Activities of Households with Home Internet

Respondents with home internet were asked about other online activities they use their service for. Nearly all used it for email (99%) and eight of out ten used it for either social networking (83%) or streaming entertainment (79%). See Exhibit 22.

Most respondents used home internet for online shopping (96%) and banking or paying bills (93%). The use of the internet for communication, entertainment or financial activities generally increased with higher household income and educational attainment.

Seven out of ten households with internet used it to access government or health services (72%). Government service use was greatest for households with $100,000 or more in income (81%), as shown in Exhibit 23 on the next page.

Conversely, only half of smartphone-only respondents accessed government services (49%). Two-thirds of rural nonmetro households accessed government or health

Exhibit 22. Have you or others in your household used the internet at home for the following activities in the past 12 months?

Online Activity	Percent
Communications & Entertainment	
Email	99%
Social networking	83%
Streaming entertainment	79%
Online Shopping & Banking	
Online shopping	96%
Banking or paying bills	93%
Other Services	
Government services	72%
Health services	72%
Educational needs	54%
Did none of these activities	0.1%

N = 6839. Response weighted by household income.

services (64% and 67%, respectively), but this was substantially lower than metro households (78% and 76%, respectively).

Just over half of respondents used their home internet for education needs (54%), and usage again increased with household income. Non-White households were 11 percentage points more likely than White households to access educational resources. Rural and nonrural respondents compared similarly with the survey average.

Online Activity Expectations of Households without Home Internet

As with work activities, households without home internet were asked about online activity expectations once they had service (see Exhibit 24).

For social networking, online shopping and banking, actual usage averaged 10 percentage points higher than expected use – a hopeful sign that households are more likely to do these online activities once they have internet access than they may have imagined.

Conversely, respondents without home internet were more optimistic they would access the service for educational needs compared to actual usage by households with internet service (63% and 54%, respectively).

Exhibit 23. Use of Government, Health and Educational Resources, by Selected Groups

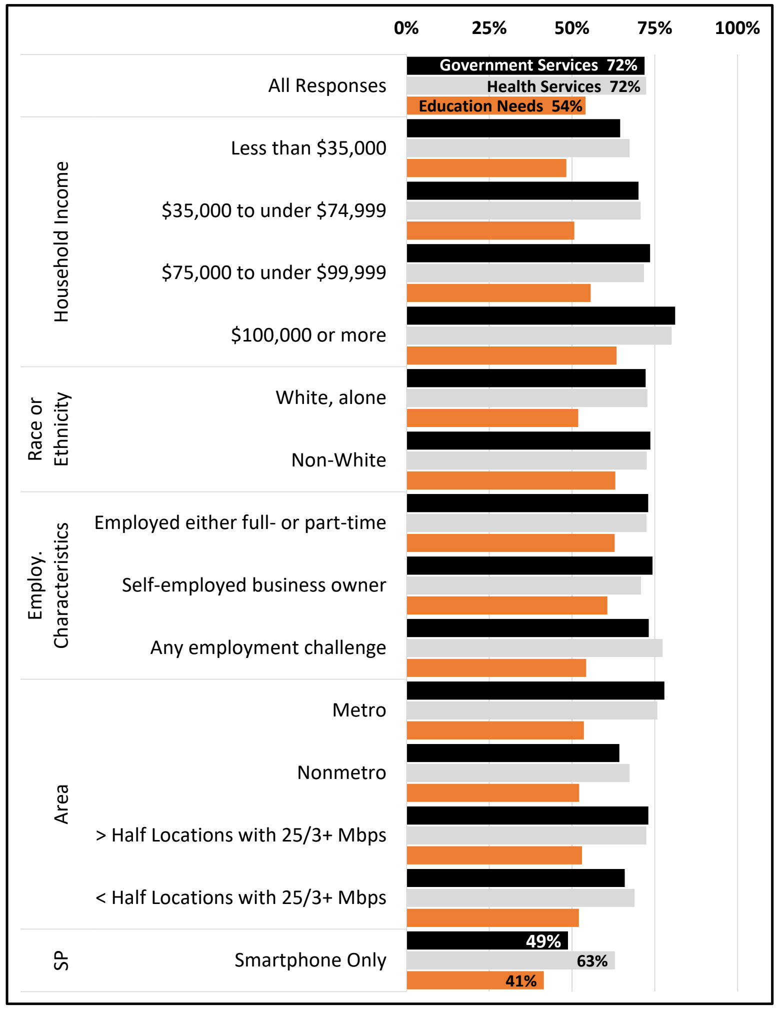


Exhibit 24. Online Activity of Households with Internet (Actual) Compared to Expected Activities of Households without Internet

Online Activity	Actual Use	Expected Use
Communications & Entertainment		
Email	99%	93%
Social networking	83%	71%
Streaming entertainment	79%	81%
Online Shopping & Banking		
Online shopping	96%	86%
Banking or paying bills	93%	83%
Other Services		
Government services	72%	73%
Health services	72%	73%
Educational needs	54%	63%
Did none of these activities	0.1%	0.9%

Internet Assistance and Concerns

Training or Assistance Interest

The survey asked households if they were interested in training or assistance with internet-related activities. Over half of respondents indicated an interest in at least one area (56%). Exhibit 25 shows that finding trusted information and resources was the top interest followed by setting up or using new devices (33% and 28%, respectively).

Responses varied significantly by population groups (see Exhibit 26). Seven out of ten low-income, Non-White and employment-challenged households were interested in at least one area of training or assistance. These groups ranged from 4 to 15 percent points more interested in a topic than the survey average.

Three out of ten Non-White, self-employed business and employment-challenged respondents were interested in training or assistance in using devices/internet to start or manage a business. Appendix B has additional population group details.

Exhibit 25. Which of the following areas would training or assistance interest you or others in your household?

Training or Assistance Topic	Percent
Finding information and resources I trust	33%
Setting up or using new devices	28%
Accessing health care resources online	25%
Accessing education resources online	23%
Using devices/internet to connect with family and friends	21%
Gaining job skills online	21%
Managing and paying bills online	20%
Using the internet to buy things or services	19%
Using devices/internet to start or manage a business	19%
Not interested in any of these topics	44%

N = 7566. Response weighted by household income.

Exhibit 26. Areas of Training or Assistance Interest, by Selected Groups

Below Avg. Average Above Avg.

By Group	Find info. and resources I trust	Set up or use new devices	Access health care resources	Access education resources	Connect with family or friends	Gain job skills	Manage and pay bills	Buy things or services	Start or manage a business	Not interested in these topics
All Responses	**33%**	**28%**	**25%**	**23%**	**21%**	**21%**	**20%**	**19%**	**19%**	**44%**
By Household Income										
Less than $35,000	46%	37%	37%	33%	32%	30%	30%	28%	23%	29%
$35,000 to under $74,999	33%	30%	24%	23%	22%	21%	20%	20%	19%	42%
$75,000 to under $99,999	26%	25%	20%	18%	17%	18%	17%	17%	16%	48%
$100,000 or more	22%	20%	14%	15%	12%	14%	11%	10%	15%	59%
By Race or Ethnicity										
White, alone	30%	27%	21%	19%	19%	17%	17%	17%	15%	48%
Non-White	42%	35%	33%	35%	29%	36%	28%	28%	29%	30%
Employment Characteristics										
Employed either full- or part-time	25%	20%	19%	19%	16%	21%	16%	14%	17%	53%
Self-employed business owner	31%	28%	22%	24%	19%	21%	19%	18%	31%	43%
Any employment challenge	45%	36%	38%	36%	32%	33%	31%	29%	29%	29%
Area										
Metro	31%	28%	21%	21%	17%	20%	16%	15%	16%	45%
Nonmetro	30%	27%	24%	20%	23%	16%	21%	21%	18%	48%
> Half Locations with 25/3+ Mbps	31%	28%	22%	21%	19%	19%	17%	16%	16%	46%
< Half Locations with 25/3+ Mbps	32%	29%	26%	22%	26%	18%	24%	24%	19%	45%
Devices										
Smartphone Only	39%	37%	30%	28%	32%	26%	26%	28%	18%	34%

Where Respondents Go for Internet or Device Assistance

A survey question asked where the respondent would go, apart from family or friends, for internet or device assistance. Exhibit 27 shows that nearly six out of ten respondents would use online resources first (58%). As the top choice, it underscores the need for households to have high-quality internet service and devices they can use to access resources.

Internet service providers (ISP) were the second choice of respondents (41%), followed by work or coworkers and local government (28% and 27%, respectively).

Responses also varied by population group, although less than for training or assistance interest (see Exhibit 28). Work or coworkers were less important as an assistance resource for low-income or employment-challenged households, likely due to less stable employment. However, local government – which includes libraries and schools – was significantly more important to these groups as an assistance resource.

Exhibit 27. Apart from family or friends, where would you or others in your household be likely to go for internet or device assistance?

Resource	Percent
Online resources (i.e. YouTube)	58%
My internet service provider	41%
My work or coworkers	28%
Local government (i.e. libraries, schools)	27%
Local technology business or retailer	19%
Community organization (i.e. church)	8%
Do not need assistance	16%

N = 7583. Response weighted by household income.

Exhibit 28. Likely to Go for Internet or Device Assistance, by Selected Groups

Below Avg. Average Above Avg.

By Group	Online resources	My internet service provider	My work or coworkers	Local government	Local tech. business or retailer	Community organization	Do not need assistance
All Responses	**58%**	**41%**	**28%**	**27%**	**19%**	**8%**	**16%**
By Household Income							
Less than $35,000	56%	42%	17%	35%	18%	12%	13%
$35,000 to under $74,999	58%	41%	30%	30%	18%	8%	16%
$75,000 to under $99,999	58%	41%	32%	22%	19%	7%	17%
$100,000 or more	60%	39%	35%	17%	19%	5%	20%
By Race or Ethnicity							
White, alone	57%	41%	29%	23%	19%	7%	17%
Non-White	56%	43%	27%	43%	19%	14%	13%
Employment Characteristics							
Employed either full- or part-time	57%	39%	41%	23%	18%	6%	18%
Self-employed business owner	58%	41%	24%	18%	25%	6%	18%
Any employment challenge	56%	44%	22%	39%	21%	13%	13%
Area							
Metro	58%	41%	27%	30%	19%	7%	16%
Nonmetro	55%	41%	30%	19%	19%	8%	18%
> Half Locations with 25/3+ Mbps	57%	41%	28%	26%	19%	7%	17%
< Half Locations with 25/3+ Mbps	57%	41%	29%	22%	20%	8%	18%
Devices							
Smartphone Only	38%	28%	27%	40%	12%	12%	18%

For Non-White respondents, the local government tied with their ISP as a second choice for resource assistance (43%). Smartphone-only respondents were the only group not to have online resources as their top choice for assistance, further underscoring the need for personal computers to better access the internet.

Concerns with Internet Usage

A survey question asked what concerns respondents had about internet use. Eight out of ten respondents indicated the security of their personal information as their top concern (see Exhibit 29). Two-thirds of respondents were concerned with getting computer viruses or websites tracking them.

Low-income, Non-White and employment-challenged households were generally more concerned about internet usage than other population groups. Employment-challenged respondents were 7 to 10 percentage points more concerned than the survey average with misleading information and surveillance. Appendix 30 has additional population group details.

Exhibit 29. Which concerns do you have about internet use?

Concerns	Percent
Security of personal information	80%
Getting viruses on my computer	65%
Websites tracking me/us	64%
Misleading information	56%
Surveillance	44%
Negative influences (i.e. cyberbullying)	30%
No concerns	10%

N = 7614. Response weighted by household income.

Exhibit 30. Concerns about Internet Use, by Selected Groups

Below Avg. Average Above Avg.

By Resource	Security of personal info.	Getting computer viruses	Websites tracking me/us	Misleading information	Surveillance	Negative influences	No concerns
All Responses	**80%**	**65%**	**64%**	**56%**	**44%**	**30%**	**10%**
By Household Income							
Less than $35,000	81%	69%	66%	60%	49%	30%	9%
$35,000 to under $74,999	82%	69%	67%	56%	44%	29%	9%
$75,000 to under $99,999	79%	64%	64%	54%	41%	30%	9%
$100,000 or more	77%	58%	60%	52%	39%	29%	12%
By Race or Ethnicity							
White, alone	80%	65%	64%	54%	42%	28%	10%
Non-White	83%	71%	68%	60%	53%	35%	8%
Employment Characteristics							
Employed either full- or part-time	77%	60%	62%	51%	42%	30%	12%
Self-employed business owner	78%	69%	64%	54%	44%	29%	11%
Any employment challenge	82%	71%	66%	63%	54%	33%	8%
Area							
Metro	83%	67%	66%	57%	46%	31%	8%
Nonmetro	78%	66%	64%	51%	42%	26%	12%
> Half Locations with 25/3+ Mbps	82%	66%	66%	55%	45%	30%	9%
< Half Locations with 25/3+ Mbps	77%	66%	64%	51%	43%	24%	12%
Devices							
Smartphone Only	77%	60%	58%	50%	44%	30%	13%

Appendix A: Survey Questions

The survey questions below were preceded by an introductory page with additional information such as the principal researcher and University of Missouri Institutional Review Board contact information.

The survey had a maximum of 23 questions. Some questions were presented dependent on responses to previous questions.

Block 1: Internet Service

Q1. Which of the following devices are used in your home? Check all that apply.

- ☐ Smartphone
- ☐ Tablet
- ☐ Personal Computer (laptop/desktop)
- ☐ Other (Smart TV, Gaming console)
- ☐ None

Q2. What would you be willing to pay to buy or replace a laptop, desktop, or tablet?

- ○ Less than $100
- ○ $100 - $249.99
- ○ $250 - $499.99
- ○ $500 - $749.99
- ○ $750 - $999.99
- ○ $1,000 or more
- ○ Not willing to pay for these devices

Q3. Did you pay for a home internet subscription at any time over the past 12 months?

- ☐ Yes
- ☐ No - internet service not available where I live
- ☐ No - chose not to purchase internet services
- ☐ No - do not know if internet services are available

Q4. Why did you <u>not purchase home internet services</u>? Check all that apply.

- ☐ Internet is too slow for browsing, video/gaming, or file transfer use
- ☐ Internet is too expensive
- ☐ Internet is not reliable
- ☐ Only use smartphone
- ☐ No challenges OR Do not need internet services

Q5. What <u>type of home internet service</u> did you subscribe to? Select one.

- ○ Fiber optic
- ○ Cable
- ○ DSL
- ○ Satellite
- ○ Fixed wireless antenna
- ○ Cellular data plan or hotspot
- ○ Dial-up phone line
- ○ Do not know

Q6. For your home internet cost, do you pay for <u>internet only or bundled services</u> (like TV channels or phone services)?

- ○ Internet only
- ○ Bundle (Internet + other services)

Q7. What is your <u>monthly internet cost</u>? OR **What would you be <u>willing to pay</u> for monthly internet that meets your needs?**

- ○ Less than $10
- ○ $10 - $25
- ○ $25 - $49.99
- ○ $50 - $74.99
- ○ $75 - $99.99
- ○ $100 or more
- ○ Not willing to pay for internet service

Block 2: Internet Activities

Q8. Have you or others in your household <u>used the internet at home</u> for the following <u>work activities</u> in the past 12 months? Check all that apply

- ☐ Work remotely at least one day a week
- ☐ Teleconference (i.e. Zoom)
- ☐ Running my business (i.e. selling online, gig work)
- ☐ Online training course(s)
- ☐ Search or apply for a job
- ☐ Did none of these work activities OR Would not use for these work activities

Q9. Have you or others in your household used the internet at home for the following activities in the past 12 months? Check all that apply.

- ☐ Email
- ☐ Online shopping
- ☐ Social networking (i.e. Instagram)
- ☐ Streaming entertainment (i.e. video, games)
- ☐ Banking or paying bills
- ☐ Educational needs (i.e. homework, classes)
- ☐ Government services (i.e. library, renew license)
- ☐ Health services (i.e. telehealth, patient portal)
- ☐ Did none of these activities OR Would not use internet

Block 3: Internet Assistance

Q10. In which of the following areas would <u>training or assistance</u> interest you or others in your household? Check all that apply.

- ☐ Setting up or using new devices
- ☐ Finding information and resources I trust
- ☐ Using devices/internet to connect with family and friends
- ☐ Using the internet to buy things or services
- ☐ Managing and paying bills online
- ☐ Accessing health care resources online
- ☐ Accessing education resources online
- ☐ Gaining job skills online
- ☐ Using devices/internet to start or manage a business
- ☐ Not interested in any of these topics

Q11. Apart from family or friends, where would you or others in your household be <u>likely to go for internet or device assistance</u>? Check all that apply.

- ☐ Local government (i.e. libraries, schools)
- ☐ Community organization (i.e. church)
- ☐ My internet service provider
- ☐ Local technology business or retailer
- ☐ My work or coworkers
- ☐ Online resources (i.e. YouTube)
- ☐ Do not need assistance

Q12. Which concerns do you have about <u>internet use</u>? Check all that apply.

- ☐ Security of personal information (i.e. identity theft, getting hacked)
- ☐ Negative influences (i.e. cyberbullying)
- ☐ Getting viruses on my computer
- ☐ Websites tracking me/us
- ☐ Misleading information
- ☐ Surveillance
- ☐ No concerns

Block 4: Background

Q13. What zip code do you live in?

- ◯ Zip code:

Q14. What is your gender?

- ◯ Male
- ◯ Female
- ◯ Prefer to self-describe ___________
- ◯ Prefer not to answer

Q15. How old are you?

- ◯ 18-24
- ◯ 25-34
- ◯ 35-44
- ◯ 45-54
- ◯ 55-64
- ◯ 65 and over
- ◯ Prefer not to answer

Q16. Are you of Hispanic, Latino, or Spanish origin?

- ◯ Yes
- ◯ No
- ◯ Prefer not to answer

Q17. How would you describe yourself? Check all that apply.

- ☐ White
- ☐ Black or African American
- ☐ American Indian or Alaska Native
- ☐ Asian-American or Asian
- ☐ Native Hawaiian or Other Pacific Islander
- ☐ Other
- ☐ Prefer not to answer

Q18. What is the highest level of education you have completed?

- ○ Less than high school degree
- ○ High school degree or equivalent (GED)
- ○ Some college but no degree
- ○ Associate's/Technical degree or Apprenticeship
- ○ Bachelor's degree or above
- ○ Prefer not to answer

Q19. Did you face any of these employment challenges last year? Check all that apply.

- ☐ Have a disability
- ☐ Have limited English speaking or reading ability
- ☐ Have been incarcerated either last year or in prior years
- ☐ Have been homeless at times
- ☐ No - none of these challenges
- ☐ Prefer not to answer

Q20. Last year, which category best described your employment status?

- Worked as a full-time paid employee
- Worked as a part-time paid employee
- Worked as self-employed business owner
- Did not work but was looking for job
- No paid work for other reason (in school, care for others, disabled, etc.)
- Retired
- Prefer not to answer

Q21. Last year, what was your total household income (total of all individuals in your household)?

- Less than $35,000
- $35,000 to under $74,999
- $75,000 to under $99,999
- $100,000 or more
- Prefer not to answer

Q22. Are any of the following groups in your household? Check all that apply.

- A child under 18 years in age
- A current or former U.S. armed forces service member
- A person with a disability
- A person with limited English speaking or reading ability
- A person that has been incarcerated at times
- A person that has been homeless at times
- ⊗No one in household meets these criteria
- ⊗Prefer not to answer

Q23. Additional comments on internet availability or assistance needs?

Appendix B: Survey Result Tables

The anonymous survey asked Missouri respondents up to 12 questions regarding their home internet services, devices used to access services, internet activities, interest in assistance and concerns with internet usage. Eleven additional questions were asked about the respondent's background.

The tables presented on the following pages show the share of respondents' answers to the 12 internet-related questions grouped by:

- **Internet Service Access and Adoption**
- **Internet Activities**
- **Internet Assistance and Concerns**

The tables present the survey results by an unweighted average of all responses, a household income weighted average and 29 population sub-groups. The household income weighted average is shown to better reflect the overall state population, as respondents generally had a higher income and education level than the typical Missourian. Adjusting the overall average to represent the share of Missouri households in four income brackets increased the representation of lower-income, lower-educational attainment and Non-White respondents.

Population sub-groups' figures are shown if a question received at least 50 responses. This threshold is used so that some data on smaller sub-groups, such as households with limited English ability, can be shown to assist with broadband planning efforts.

Sub-group respondent levels and margin of error (ME) estimates are provided in Exhibit B1. Smaller-response groups are noted with an ME greater than 5.0% indicating that only answers substantially different from the average are meaningful given the higher error levels.

Exhibit B1. Respondent Numbers and Margin of Error (ME) Estimates

Groups	Survey Respond-ents	ME*
Completed Surveys	7,504	1.0%
Household Income		
Less than $35,000	1,087	2.5%
$35,000 to under $74,999	1,874	1.9%
$75,000 to under $99,999	1,164	2.4%
$100,000 or more	1,897	1.9%
Age		
18-34	825	2.9%
35-64	4,259	1.3%
65 and over	2,147	1.8%
Race or Ethnicity		
White, alone	6,325	1.0%
Non-White	605	3.4%
Black or African American, alone	283	4.9%
Hispanic, Latino, or Spanish origin**	127	7.3%
Educational Attainment		
High school degree or GED	808	2.9%
Some college but no degree	1,353	2.2%
Associate's/Tech. degree	935	2.7%
Bachelor's degree or above	4,119	1.3%
Employment Characteristics		
Employed either full- or part-time	4,157	1.3%
Self-employed business owner	618	3.3%
Faced any employment challenge	905	2.7%
Selected Household (HH) Characteristics		
HH with child under 18 years in age	2,068	1.8%
HH with current or former U.S. armed forces member	1,102	2.5%
HH with a person that has a disability	1,528	2.1%
HH with person that has limited English ability**	97	8.4%
HH with person that has been incarcerated at times**	133	7.1%
HH with person that has been homeless at times**	227	5.4%
Area		
Metro	4,322	1.3%
Nonmetro	3,055	1.5%
Higher Access: > Half Locations with 25/3+ Mbps	6,442	1.0%
Low Access: < Half Locations with 25/3+ Mbps	1,062	2.5%
Smartphone Only		
Smartphone Only	434	4.0%

*Margin of error (ME) at 90% confidence level. ** Smaller-response groups have a ME > 5.0% so only substantially different responses are meaningful.

Internet Service Access and Adoption – Questions 1 and 2 Tables

Questions about devices at home and willingness to pay for a laptop, desktop or tablet.

	Q1. Which of the following devices are used in your home?		Q2. What would you be willing to pay to buy or replace a laptop, desktop, or tablet?						
	Have a personal computer at home	Smart-phone Only	Less than $100	$100 - $249	$250 - $499	$500 - $749	$750 - $999	$1,000 or more	Not willing to pay for these devices
Unweighted Responses	89.4%	5.4%	5.8%	18.5%	27.5%	17.5%	11.1%	12.8%	6.7%
Weighted Responses by Household Income	**88.4%**	**6.2%**	**7.2%**	**19.9%**	**27.1%**	**16.8%**	**10.2%**	**12.6%**	**6.2%**
Household Income									
Less than $35,000	78%	12%	17%	28%	23%	9%	5%	6%	12%
$35,000 to under $74,999	89%	5%	5%	23%	31%	18%	9%	9%	5%
$75,000 to under $99,999	93%	4%	2%	17%	31%	20%	12%	13%	3%
$100,000 or more	96%	2%	1%	9%	26%	21%	16%	24%	3%
Age									
18-34	89%	6%	5%	18%	25%	16%	13%	19%	4%
35-64	90%	5%	6%	18%	28%	18%	11%	13%	6%
65 and over	90%	4%	4%	19%	28%	19%	11%	11%	7%
Race or Ethnicity									
White, alone	91%	5%	5%	18%	28%	18%	12%	13%	5%
Non-White	85%	8%	11%	24%	22%	15%	6%	12%	10%
Black or African American, alone	81%	10%	12%	28%	24%	12%	5%	10%	10%
Hispanic, Latino, or Spanish origin*	84%	9%	7%	29%	17%	16%	10%	13%	7%
Educational Attainment									
High school degree or GED	82%	10%	10%	27%	29%	11%	6%	5%	11%
Some college but no degree	86%	7%	8%	23%	27%	17%	8%	9%	8%
Associate's/Tech. degree	88%	7%	8%	22%	28%	17%	10%	8%	8%
Bachelor's degree or above	94%	3%	3%	14%	28%	20%	14%	17%	3%
Employment Characteristics									
Employed either full- or part-time	91%	5%	5%	17%	29%	18%	12%	15%	5%
Self-employed business owner	94%	3%	4%	13%	27%	20%	12%	19%	5%
Any employment challenge	75%	9%	15%	24%	23%	11%	7%	8%	11%
Selected Household Characteristics									
A child under 18 years in age	91%	4%	6%	20%	30%	16%	10%	14%	5%
A current or former U.S. armed forces member	93%	4%	4%	19%	27%	19%	12%	13%	6%
A person with a disability	87%	6%	10%	23%	26%	15%	9%	10%	8%
A person with limited English ability*	86%	9%	12%	19%	16%	21%	6%	11%	14%
A person that has been incarcerated at times*	88%	8%	17%	34%	17%	12%	7%	4%	9%
A person that has been homeless at times*	80%	10%	20%	29%	22%	6%	4%	10%	9%
Area									
Metro	91%	4%	5%	18%	26%	18%	13%	14%	6%
Nonmetro	89%	6%	6%	19%	30%	18%	10%	11%	6%
> Half of Served Locations with 25/3+ Mbps	89%	5%	6%	18%	27%	17%	12%	13%	7%
< Half of Served Locations with 25/3+ Mbps	89%	5%	5%	21%	31%	19%	8%	10%	6%
Smartphone Only									
Smartphone Only Respondents			21%	26%	19%	9%	3%	4%	18%

*Smaller-response population group has a margin of error above 5.0% so only substantially different survey responses from the average are meaningful.

Internet Service Access and Adoption – Questions 3 and 5 Tables

Questions about paying for internet services, availability and type of service subscribed to.

	Q3. Did you pay for a home internet subscription at any time over the past 12 months?					Q5. What type of home internet service did you subscribe to?							
	Answer		Why Did You Not Purchase Internet Services?										
	Yes	No	Internet service not available	Chose not to purchase	Do not know if available	Cable	Fiber optic	DSL	Satellite	Cellular data or hotspot	Fixed wireless antenna	Dial-up phone line	Do not know
Unweighted Responses	87.9%	12.1%	7.0%	3.7%	1.4%	25.0%	18.4%	15.8%	14.0%	9.3%	6.5%	1.2%	9.8%
Weighted Responses by Household Income	**86.5%**	**13.4%**	**7.5%**	**4.4%**	**1.6%**	**24.9%**	**18.1%**	**16.1%**	**14.1%**	**9.2%**	**6.4%**	**1.1%**	**10.0%**
Household Income													
Less than $35,000	78%	22%	9%	10%	3%	26%	13%	17%	14%	9%	5%	2%	14%
$35,000 to under $74,999	88%	12%	7%	4%	1%	24%	20%	16%	14%	10%	5%	1%	11%
$75,000 to under $99,999	89%	11%	9%	1%	1%	26%	18%	15%	15%	9%	8%	1%	7%
$100,000 or more	93%	7%	5%	1%	0%	25%	22%	15%	14%	9%	8%	1%	6%
Age													
18-34	86%	14%	8%	4%	2%	24%	23%	11%	12%	10%	5%	1%	15%
35-64	87%	13%	8%	4%	1%	23%	18%	17%	15%	10%	7%	1%	8%
65 and over	91%	9%	5%	3%	1%	28%	17%	15%	15%	8%	6%	2%	10%
Race or Ethnicity													
White, alone	88%	12%	7%	3%	1%	23%	19%	16%	15%	10%	7%	1%	9%
Non-White	89%	11%	4%	5%	1%	39%	18%	10%	7%	6%	5%	1%	14%
Black or African American, alone	93%	7%	0%	6%	1%	45%	19%	7%	5%	3%	4%	0%	16%
Hispanic, Latino, or Spanish origin*	87%	13%	6%	6%	2%	28%	23%	12%	8%	8%	6%	1%	14%
Educational Attainment													
High school degree or GED	82%	18%	9%	6%	3%	17%	12%	19%	19%	11%	7%	2%	13%
Some college but no degree	85%	15%	9%	5%	1%	24%	15%	17%	17%	10%	8%	1%	9%
Associate's/Tech. degree	85%	15%	9%	4%	1%	20%	16%	18%	17%	13%	7%	1%	7%
Bachelor's degree or above	91%	9%	6%	2%	1%	28%	21%	15%	12%	8%	6%	1%	9%
Employment Characteristics													
Employed either full- or part-time	88%	12%	8%	3%	1%	24%	20%	16%	13%	10%	7%	1%	8%
Self-employed business owner	89%	11%	8%	2%	1%	16%	18%	16%	20%	13%	9%	1%	7%
Any employment challenge	84%	16%	7%	7%	2%	25%	14%	19%	14%	8%	5%	1%	13%
Selected Household Characteristics													
A child under 18 years in age	87%	13%	9%	3%	1%	23%	17%	17%	16%	11%	7%	1%	8%
A current or former U.S. armed forces member	89%	11%	8%	2%	1%	23%	16%	19%	18%	9%	6%	1%	8%
A person with a disability	87%	13%	7%	4%	2%	26%	14%	17%	16%	9%	6%	1%	12%
A person with limited English ability*	83%	17%	9%	5%	2%	30%	21%	18%	10%	6%	3%	3%	10%
A person that has been incarcerated at times*	80%	20%	9%	8%	4%	25%	15%	13%	13%	13%	8%	3%	9%
A person that has been homeless at times*	79%	21%	7%	10%	4%	26%	14%	17%	13%	12%	6%	1%	12%
Area													
Metro	90%	10%	5%	4%	1%	32%	22%	14%	9%	7%	4%	1%	11%
Nonmetro	85%	15%	10%	3%	2%	14%	13%	20%	22%	12%	10%	2%	7%
> Half of Served Locations with 25/3+ Mbps	89%	11%	6%	4%	1%	28%	21%	15%	11%	9%	6%	1%	10%
< Half of Served Locations with 25/3+ Mbps	82%	18%	13%	3%	2%	5%	4%	24%	34%	14%	12%	2%	6%
Smartphone Only													
Smartphone Only Respondents	52%	48%	23%	18%	6%	22%	15%	9%	13%	14%	10%	2%	15%

*Smaller-response population group has a margin of error above 5.0% so only substantially different survey responses from the average are meaningful.

Internet Service Access and Adoption – Question 4 Table

Questions about home internet challenges of respondents with service and those who chose not to purchase available internet services from question 3.

	Q4. Any challenges to using the home internet? *Respondents with internet services*					Why did you not purchase home internet services? *Respondents that chose not to purchase internet*				
	Internet is not reliable	Internet is too expensive	Internet is too slow	No challenges	Reported any challenge	Internet is not reliable	Internet is too expensive	Internet is too slow	Only use smart-phone	Do not need internet services
Unweighted Responses	39.5%	43.8%	42.3%	28.6%	71.4%	26.0%	67.8%	25.6%	24.2%	9.0%
Weighted Responses by Household Income	**39.8%**	**46.3%**	**42.3%**	**27.2%**	**72.7%**	**30.5%**	**66.6%**	**32.1%**	**24.2%**	**6.0%**
Household Income										
Less than $35,000	37%	54%	43%	22%	78%	19%	77%	20%	23%	5%
$35,000 to under $74,999	40%	49%	42%	27%	73%	25%	71%	28%	34%	7%
$75,000 to under $99,999	40%	42%	42%	30%	70%	ND	ND	ND	ND	ND
$100,000 or more	41%	37%	42%	32%	68%	ND	ND	ND	ND	ND
Age										
18-34	43%	42%	41%	29%	71%	ND	ND	ND	ND	ND
35-64	44%	47%	46%	25%	75%	30%	72%	29%	22%	4%
65 and over	31%	39%	37%	33%	67%	20%	61%	16%	31%	13%
Race or Ethnicity										
White, alone	41%	43%	43%	28%	72%	30%	70%	28%	25%	6%
Non-White	30%	50%	34%	30%	70%	ND	ND	ND	ND	ND
Black or African American, alone	20%	51%	28%	36%	64%	ND	ND	ND	ND	ND
Hispanic, Latino, or Spanish origin*	34%	46%	41%	28%	72%	ND	ND	ND	ND	ND
Educational Attainment										
High school degree or GED	44%	47%	50%	20%	80%	19%	63%	25%	27%	4%
Some college but no degree	43%	47%	48%	24%	76%	29%	75%	29%	30%	6%
Associate's/Tech. degree	45%	50%	49%	24%	76%	ND	ND	ND	ND	ND
Bachelor's degree or above	37%	42%	38%	32%	68%	26%	69%	22%	25%	9%
Employment Characteristics										
Employed either full- or part-time	43%	45%	44%	27%	73%	28%	68%	31%	26%	7%
Self-employed business owner	47%	45%	50%	24%	76%	ND	ND	ND	ND	ND
Any employment challenge	43%	53%	44%	22%	78%	11%	75%	21%	28%	4%
Selected Household Characteristics										
A child under 18 years in age	48%	46%	50%	23%	77%	38%	69%	43%	25%	3%
A current or former U.S. armed forces member	44%	45%	50%	24%	76%	ND	ND	ND	ND	ND
A person with a disability	44%	51%	48%	21%	79%	18%	79%	24%	27%	4%
A person with limited English ability*	38%	44%	39%	30%	70%	ND	ND	ND	ND	ND
A person that has been incarcerated at times*	39%	58%	37%	29%	71%	ND	ND	ND	ND	ND
A person that has been homeless at times*	51%	59%	45%	20%	80%	ND	ND	ND	ND	ND
Area										
Metro	32%	43%	33%	35%	65%	17%	70%	17%	22%	11%
Nonmetro	52%	46%	57%	18%	82%	45%	67%	46%	31%	2%
> Half of Served Locations with 25/3+ Mbps	36%	43%	38%	32%	68%	22%	67%	21%	24%	10%
< Half of Served Locations with 25/3+ Mbps	63%	51%	71%	8%	92%	53%	72%	58%	28%	3%
Smartphone Only										
Smartphone Only Respondents	32%	37%	40%	33%	67%	23%	68%	18%	37%	5%

ND is not disclosed due to less than 50 responses to this question in the sub-group.
*Smaller-response population group has a margin of error above 5.0% so only substantially different survey responses from the average are meaningful.

Internet Service Access and Adoption – Questions 6 and 7 Tables

Questions about monthly internet cost without bundled entertainment services, from question 6, to isolate internet-only expenditures and willingness to pay (for respondents without internet service).

	Q7. What is your monthly internet cost? *Respondents with internet-only services in Q6*					What would you be willing to pay for monthly internet that meets your needs? *Respondents who did not have internet services*							
	Less than $25	$25 - $49.99	$50 - $74.99	$75 - $99.99	$100 or more	Less than $10	$10 - $25	$25 - $49.99	$50 - $74.99	$75 - $99.99	$100 or more	Not willing to pay
Unweighted Responses	2.0%	13.3%	40.1%	25.5%	19.2%	8.1%	15.8%	28.8%	25.0%	10.4%	5.2%	6.7%
Weighted Responses by Household Income	**2.7%**	**13.7%**	**39.2%**	**25.3%**	**19.0%**	**7.0%**	**14.8%**	**27.0%**	**27.6%**	**12.1%**	**6.7%**	**4.7%**
Household Income												
Less than $35,000	7%	19%	37%	22%	15%	17%	26%	26%	15%	3%	1%	13%
$35,000 to under $74,999	1%	14%	43%	25%	17%	5%	18%	34%	25%	11%	5%	2%
$75,000 to under $99,999	0%	12%	40%	29%	18%	0%	7%	31%	38%	17%	7%	0%
$100,000 or more	1%	9%	37%	27%	26%	2%	5%	18%	38%	21%	14%	2%
Age												
18-34	2%	12%	42%	27%	17%	5%	7%	23%	36%	14%	8%	7%
35-64	2%	11%	39%	26%	21%	7%	17%	28%	25%	11%	6%	5%
65 and over	1%	18%	41%	23%	16%	10%	18%	37%	21%	5%	4%	6%
Race or Ethnicity												
White, alone	1%	13%	40%	26%	20%	6%	16%	30%	26%	11%	6%	4%
Non-White	7%	14%	42%	23%	14%	19%	21%	22%	13%	0%	3%	22%
Black or African American, alone	12%	16%	44%	23%	5%	ND	ND	ND	ND	ND	ND	ND
Hispanic, Latino, or Spanish origin*	4%	8%	38%	25%	26%	ND	ND	ND	ND	ND	ND	ND
Educational Attainment												
High school degree or GED	3%	14%	37%	26%	20%	13%	17%	35%	20%	5%	4%	6%
Some college but no degree	3%	14%	40%	24%	19%	5%	16%	31%	28%	10%	4%	7%
Associate's/Tech. degree	2%	12%	36%	26%	24%	8%	16%	30%	25%	10%	6%	4%
Bachelor's degree or above	1%	13%	41%	26%	18%	6%	16%	27%	28%	13%	7%	4%
Employment Characteristics												
Employed either full- or part-time	1%	11%	41%	27%	20%	5%	15%	29%	29%	13%	6%	3%
Self-employed business owner	1%	15%	37%	25%	23%	3%	14%	28%	29%	6%	19%	1%
Any employment challenge	6%	16%	38%	22%	17%	17%	26%	26%	13%	4%	0%	15%
Selected Household Characteristics												
A child under 18 years in age	1%	9%	38%	26%	25%	4%	15%	28%	26%	15%	8%	4%
A current or former U.S. armed forces member	1%	13%	35%	27%	24%	6%	14%	33%	24%	10%	11%	2%
A person with a disability	4%	15%	36%	25%	20%	10%	23%	30%	18%	7%	4%	9%
A person with limited English ability*	2%	13%	44%	15%	25%	ND	ND	ND	ND	ND	ND	ND
A person that has been incarcerated at times*	3%	13%	46%	21%	18%	ND	ND	ND	ND	ND	ND	ND
A person that has been homeless at times*	5%	17%	35%	24%	19%	ND	ND	ND	ND	ND	ND	ND
Area												
Metro	3%	14%	43%	26%	15%	11%	19%	26%	22%	7%	5%	11%
Nonmetro	1%	12%	37%	26%	25%	4%	13%	33%	30%	13%	6%	2%
> Half of Served Locations with 25/3+ Mbps	2%	14%	42%	26%	17%	10%	15%	29%	22%	10%	5%	8%
< Half of Served Locations with 25/3+ Mbps	0%	10%	31%	25%	34%	2%	18%	26%	35%	12%	5%	1%
Smartphone Only												
Smartphone Only Respondents	7%	20%	37%	22%	14%	14%	21%	28%	20%	5%	1%	10%

ND is not disclosed due to less than 50 responses to this question in the sub-group.
*Smaller-response population group has a margin of error above 5.0% so only substantially different survey responses from the average are meaningful.

Internet Activities – Question 8 Table

Questions about using the home internet for work activities for those with and without internet services. Comparing activities of respondents with internet access to the desired uses of respondents without access shows where expectations differ from reality.

	Q8. Have you or others in your household used the internet at home for the following work activities in the past 12 months? *Respondents with internet services*						If you could have the internet at home, which work activities would you or others in your household like to use it for? *Respondents without internet services*					
	Work remotely at least one day a week	Tele-conference	Search and apply for a job	Online training course(s)	Running my business	Did none of these work activities	Work remotely at least one day a week	Tele-conference	Search and apply for a job	Online training courses	Running my business	Would not use for these work activities
Unweighted Responses	49.8%	55.9%	28.7%	43.7%	22.0%	24.1%	48.4%	45.9%	30.8%	48.4%	34.9%	23.5%
Weighted Responses by Household Income	**47.6%**	**55.2%**	**32.0%**	**44.1%**	**22.4%**	**23.6%**	**51.7%**	**49.6%**	**31.9%**	**50.9%**	**37.6%**	**20.6%**
Household Income												
Less than $35,000	26%	40%	38%	34%	19%	34%	37%	31%	38%	46%	31%	30%
$35,000 to under $74,999	45%	50%	30%	44%	23%	26%	46%	47%	30%	51%	33%	23%
$75,000 to under $99,999	52%	58%	31%	46%	22%	20%	57%	57%	26%	54%	43%	13%
$100,000 or more	71%	75%	29%	53%	26%	11%	70%	68%	31%	54%	47%	12%
Age												
18-34	64%	67%	50%	53%	26%	8%	56%	50%	35%	52%	41%	14%
35-64	61%	65%	36%	52%	25%	14%	57%	53%	36%	56%	39%	16%
65 and over	25%	38%	8%	27%	15%	47%	24%	31%	15%	32%	24%	46%
Race or Ethnicity												
White, alone	49%	56%	27%	43%	22%	25%	50%	47%	30%	49%	35%	23%
Non-White	55%	62%	44%	51%	20%	15%	43%	48%	38%	52%	33%	24%
Black or African American, alone	52%	60%	45%	46%	14%	17%	ND	ND	ND	ND	ND	ND
Hispanic, Latino, or Spanish origin*	57%	64%	49%	55%	29%	10%	ND	ND	ND	ND	ND	ND
Educational Attainment												
High school degree or GED	29%	30%	24%	27%	18%	40%	36%	29%	24%	39%	22%	36%
Some college but no degree	41%	44%	27%	37%	21%	32%	44%	40%	25%	43%	32%	28%
Associate's/Tech. degree	42%	48%	32%	44%	24%	27%	43%	38%	30%	49%	37%	28%
Bachelor's degree or above	58%	67%	30%	50%	23%	17%	61%	64%	36%	58%	43%	13%
Employment Characteristics												
Employed either full- or part-time	67%	68%	38%	55%	21%	11%	60%	55%	34%	55%	35%	16%
Self-employed business owner	58%	64%	23%	52%	72%	5%	55%	59%	23%	61%	80%	7%
Any employment challenge	37%	50%	43%	43%	22%	27%	47%	41%	43%	50%	36%	25%
Selected Household Characteristics												
A child under 18 years in age	66%	70%	42%	57%	28%	8%	63%	59%	36%	60%	45%	12%
A current or former U.S. armed forces member	44%	55%	28%	46%	21%	27%	49%	47%	25%	54%	37%	24%
A person with a disability	43%	55%	37%	46%	23%	26%	49%	50%	41%	51%	39%	24%
A person with limited English ability*	50%	65%	42%	53%	33%	17%	ND	ND	ND	ND	ND	ND
A person that has been incarcerated at times*	38%	58%	56%	46%	30%	15%	ND	ND	ND	ND	ND	ND
A person that has been homeless at times*	49%	62%	62%	58%	24%	16%	ND	ND	ND	ND	ND	ND
Area												
Metro	53%	59%	31%	44%	19%	23%	47%	46%	33%	46%	31%	26%
Nonmetro	46%	53%	26%	44%	26%	24%	51%	47%	28%	52%	40%	20%
> Half of Served Locations with 25/3+ Mbps	50%	57%	29%	44%	21%	24%	47%	46%	32%	47%	33%	24%
< Half of Served Locations with 25/3+ Mbps	47%	51%	26%	44%	26%	25%	53%	47%	27%	53%	43%	20%
Smartphone Only												
Smartphone Only Respondents	32%	34%	23%	20%	11%	39%	40%	36%	32%	40%	26%	28%

ND is not disclosed due to less than 50 responses to this question in the sub-group.
*Smaller-response population group has a margin of error above 5.0% so only substantially different survey responses from the average are meaningful.

Internet Activities – Question 9 Table

Questions about using the home internet for communication, financial and service activities for those with and without internet services. Comparing activities of respondents with internet access to the desired uses of respondents without access can show where expectations differ from reality.

	Q9. Have you or others in your household used the internet at home for the following activities in the past 12 months? *Respondents with internet services*									If you could have the internet at home, which activities would you or others in your household like to use it for? *Respondents without internet services*								
	Email	Online shopping	Social net-working	Stream entertain-ment	Banking or paying bills	Educ. needs	Gov. services	Health services	Did none of these activities	Email	Online shopping	Social net-working	Stream entertain-ment	Banking or paying bills	Educ. needs	Gov. services	Health services	Would not use internet
Unweighted Responses	98.8%	96.1%	81.4%	77.8%	92.0%	52.9%	72.1%	72.0%	0.2%	91.3%	83.2%	66.5%	76.5%	80.0%	60.1%	70.8%	70.3%	2.0%
Weighted Responses by Household Income	**98.9%**	**96.2%**	**82.6%**	**78.8%**	**92.6%**	**54.1%**	**71.9%**	**72.4%**	**0.1%**	**93.0%**	**85.7%**	**70.9%**	**81.4%**	**83.2%**	**63.5%**	**73.4%**	**73.2%**	**0.9%**
Household Income																		
Less than $35,000	98%	93%	76%	72%	89%	48%	65%	67%	0%	87%	73%	60%	75%	70%	51%	69%	68%	1%
$35,000 to under $74,999	99%	97%	82%	76%	92%	51%	70%	71%	0%	94%	89%	70%	83%	84%	63%	73%	75%	0%
$75,000 to under $99,999	99%	99%	85%	81%	95%	56%	74%	72%	0%	98%	95%	80%	89%	96%	70%	78%	75%	0%
$100,000 or more	99%	99%	89%	87%	97%	63%	81%	80%	0%	96%	90%	79%	84%	90%	74%	77%	76%	2%
Age																		
18-34	99%	98%	95%	96%	95%	68%	75%	74%	0%	96%	87%	84%	90%	89%	78%	70%	72%	0%
35-64	99%	97%	88%	85%	94%	63%	73%	73%	0%	92%	86%	70%	84%	85%	69%	73%	73%	1%
65 and over	99%	96%	67%	60%	89%	30%	70%	73%	0%	90%	82%	53%	59%	67%	31%	73%	70%	2%
Race or Ethnicity																		
White, alone	99%	97%	83%	78%	93%	52%	72%	73%	0%	93%	86%	70%	80%	82%	60%	73%	73%	1%
Non-White	98%	91%	76%	75%	88%	63%	74%	73%	0%	84%	80%	50%	63%	64%	63%	70%	61%	5%
Black or African American, alone	98%	88%	69%	68%	86%	56%	68%	71%	0%	ND	ND	ND	ND	ND	ND	ND	ND	ND
Hispanic, Latino, or Spanish origin*	100%	95%	83%	78%	89%	69%	73%	66%	0%	ND	ND	ND	ND	ND	ND	ND	ND	ND
Educational Attainment																		
High school degree or GED	98%	94%	78%	70%	85%	37%	53%	58%	0%	88%	78%	57%	76%	66%	46%	64%	59%	3%
Some college but no degree	99%	96%	80%	73%	91%	45%	64%	69%	0%	90%	84%	69%	77%	81%	53%	73%	72%	2%
Associate's/Tech. degree	99%	96%	86%	79%	93%	54%	71%	73%	0%	90%	84%	65%	83%	79%	68%	63%	73%	1%
Bachelor's degree or above	100%	98%	83%	81%	94%	59%	80%	77%	0%	96%	89%	74%	80%	89%	69%	79%	77%	1%
Employment Characteristics																		
Employed either full- or part-time	99%	97%	89%	86%	94%	63%	73%	72%	0%	93%	87%	71%	83%	87%	71%	72%	73%	1%
Self-employed business owner	99%	97%	85%	78%	93%	61%	74%	71%	0%	97%	88%	71%	83%	91%	67%	78%	70%	0%
Any employment challenge	99%	95%	81%	78%	92%	54%	73%	77%	0%	89%	75%	64%	76%	70%	51%	70%	74%	3%
Selected Household Characteristics																		
A child under 18 years in age	99%	97%	93%	93%	95%	85%	74%	75%	0%	93%	88%	74%	90%	90%	91%	76%	77%	1%
A current or former U.S. armed forces member	99%	97%	80%	74%	92%	50%	74%	74%	0%	93%	89%	69%	81%	85%	59%	75%	73%	2%
A person with a disability	99%	96%	82%	79%	92%	55%	76%	80%	0%	92%	84%	69%	81%	80%	57%	74%	81%	2%
A person with limited English ability*	99%	94%	81%	80%	87%	76%	72%	63%	1%	ND	ND	ND	ND	ND	ND	ND	ND	ND
A person that has been incarcerated at times*	99%	96%	87%	82%	93%	62%	76%	75%	0%	ND	ND	ND	ND	ND	ND	ND	ND	ND
A person that has been homeless at times*	100%	96%	87%	88%	96%	66%	78%	84%	0%	ND	ND	ND	ND	ND	ND	ND	ND	ND
Area																		
Metro	99%	96%	79%	78%	93%	54%	78%	76%	0%	89%	80%	63%	72%	76%	59%	70%	67%	3%
Nonmetro	99%	97%	86%	78%	92%	52%	64%	67%	0%	94%	88%	72%	83%	85%	62%	73%	75%	0%
> Half of Served Locations with 25/3+ Mbps	99%	96%	80%	78%	92%	53%	73%	72%	0%	91%	81%	65%	74%	79%	60%	69%	69%	2%
< Half of Served Locations with 25/3+ Mbps	99%	98%	88%	78%	94%	52%	66%	69%	0%	93%	93%	72%	84%	85%	62%	76%	76%	1%
Smartphone Only																		
Smartphone Only Respondents	92%	83%	74%	71%	80%	41%	49%	63%	0%	84%	72%	55%	69%	68%	49%	59%	62%	1%

ND is not disclosed due to less than 50 responses to this question in the sub-group.
*Smaller-response population group has a margin of error above 5.0% so only substantially different survey responses from the average are meaningful.

Internet Assistance and Concerns – Question 10 Table

Question about interest in internet, device or resource training or assistance.

	Q10. In which of the following areas would training or assistance interest you or your household?									
	Setting up or using new devices	Finding info. and resources I trust	Using devices or internet to connect with family & friends	Using the internet to buy things or services	Managing and paying bills online	Accessing health care resources online	Accessing educ. resources online	Gaining job skills online	Using devices or internet to start or manage a business	Not interested in any of these topics
Unweighted Responses	28.0%	31.0%	19.7%	17.5%	18.3%	22.2%	20.8%	18.5%	16.6%	46.0%
Weighted Responses by Household Income	**28.5%**	**32.8%**	**21.4%**	**19.1%**	**20.3%**	**24.7%**	**22.9%**	**21.0%**	**18.5%**	**43.7%**
Household Income										
Less than $35,000	37%	46%	32%	28%	30%	37%	33%	30%	23%	29%
$35,000 to under $74,999	30%	33%	22%	20%	20%	24%	23%	21%	19%	42%
$75,000 to under $99,999	25%	26%	17%	17%	17%	20%	18%	18%	16%	48%
$100,000 or more	20%	22%	12%	10%	11%	14%	15%	14%	15%	59%
Age										
18-34	12%	21%	15%	14%	16%	19%	23%	27%	20%	56%
35-64	22%	26%	17%	15%	17%	20%	20%	22%	19%	51%
65 and over	46%	43%	26%	23%	22%	28%	21%	9%	10%	33%
Race or Ethnicity										
White, alone	27%	30%	19%	17%	17%	21%	19%	17%	15%	48%
Non-White	35%	42%	29%	28%	28%	33%	35%	36%	29%	30%
Black or African American, alone	42%	52%	35%	34%	34%	40%	40%	44%	33%	18%
Hispanic, Latino, or Spanish origin*	34%	37%	24%	22%	26%	30%	41%	39%	28%	32%
Educational Attainment										
High school degree or GED	30%	36%	30%	28%	25%	28%	20%	19%	15%	40%
Some college but no degree	32%	36%	25%	22%	23%	26%	23%	21%	19%	41%
Associate's/Tech. degree	29%	32%	22%	21%	22%	25%	25%	23%	20%	44%
Bachelor's degree or above	26%	28%	15%	12%	14%	19%	19%	16%	16%	50%
Employment Characteristics										
Employed either full- or part-time	20%	25%	16%	14%	16%	19%	19%	21%	17%	53%
Self-employed business owner	28%	31%	19%	18%	19%	22%	24%	21%	31%	43%
Any employment challenge	36%	45%	32%	29%	31%	38%	36%	33%	29%	29%
Selected Household Characteristics										
A child under 18 years in age	16%	22%	15%	14%	15%	18%	23%	23%	20%	55%
A current or former U.S. armed forces member	32%	38%	24%	21%	23%	26%	22%	17%	17%	41%
A person with a disability	34%	39%	25%	22%	24%	31%	29%	25%	23%	36%
A person with limited English ability*	34%	38%	27%	25%	28%	34%	47%	39%	37%	33%
A person that has been incarcerated at times*	26%	41%	27%	20%	23%	36%	41%	41%	32%	33%
A person that has been homeless at times*	36%	45%	32%	23%	31%	39%	40%	45%	37%	28%
Area										
Metro	28%	31%	17%	15%	16%	21%	21%	20%	16%	45%
Nonmetro	27%	30%	23%	21%	21%	24%	20%	16%	18%	48%
> Half of Served Locations with 25/3+ Mbps	28%	31%	19%	16%	17%	22%	21%	19%	16%	46%
< Half of Served Locations with 25/3+ Mbps	29%	32%	26%	24%	24%	26%	22%	18%	19%	45%
Smartphone Only										
Smartphone Only Respondents	37%	39%	32%	28%	26%	30%	28%	26%	18%	34%

*Smaller-response population group has a margin of error above 5.0% so only substantially different survey responses from the average are meaningful.

Internet Assistance and Concerns – Question 11 Table

Question about where respondents or others in household would likely go to for internet or device assistance outside of family and friends.

	Q11. Apart from family or friends, where would you or others in your household be likely to go for internet or device assistance?						
	Local gov. (i.e. libraries, schools)	Community org. (i.e. church)	My internet service provider	Local technology business or retailer	My work or coworkers	Online resources (i.e. YouTube)	Do not need assistance
Unweighted Responses	25.3%	7.5%	41.0%	19.1%	28.2%	56.7%	17.1%
Weighted Responses by Household Income	**27.0%**	**8.1%**	**40.9%**	**18.6%**	**27.7%**	**57.6%**	**16.1%**
Household Income							
Less than $35,000	35%	12%	42%	18%	17%	56%	13%
$35,000 to under $74,999	30%	8%	41%	18%	30%	58%	16%
$75,000 to under $99,999	22%	7%	41%	19%	32%	58%	17%
$100,000 or more	17%	5%	39%	19%	35%	60%	20%
Age							
18-34	22%	5%	35%	14%	30%	58%	22%
35-64	24%	7%	39%	18%	35%	57%	18%
65 and over	29%	9%	49%	23%	15%	57%	13%
Race or Ethnicity							
White, alone	23%	7%	41%	19%	29%	57%	17%
Non-White	43%	14%	43%	19%	27%	56%	13%
Black or African American, alone	54%	16%	49%	18%	27%	55%	9%
Hispanic, Latino, or Spanish origin*	29%	16%	39%	17%	34%	59%	15%
Educational Attainment							
High school degree or GED	22%	9%	41%	13%	23%	45%	20%
Some college but no degree	25%	8%	42%	18%	24%	53%	18%
Associate's/Tech. degree	23%	8%	40%	18%	29%	57%	18%
Bachelor's degree or above	26%	7%	41%	21%	31%	61%	15%
Employment Characteristics							
Employed either full- or part-time	23%	6%	39%	18%	41%	57%	18%
Self-employed business owner	18%	6%	41%	25%	24%	58%	18%
Any employment challenge	39%	13%	44%	21%	22%	56%	13%
Selected Household Characteristics							
A child under 18 years in age	24%	8%	36%	18%	35%	57%	20%
A current or former U.S. armed forces member	27%	9%	46%	21%	24%	58%	17%
A person with a disability	33%	11%	44%	19%	25%	58%	14%
A person with limited English ability*	35%	13%	41%	11%	29%	54%	16%
A person that has been incarcerated at times*	35%	14%	42%	17%	28%	56%	17%
A person that has been homeless at times*	41%	18%	43%	21%	32%	65%	11%
Area							
Metro	30%	7%	41%	19%	27%	58%	16%
Nonmetro	19%	8%	41%	19%	30%	55%	18%
> Half of Served Locations with 25/3+ Mbps	26%	7%	41%	19%	28%	57%	17%
< Half of Served Locations with 25/3+ Mbps	22%	8%	41%	20%	29%	57%	18%
Smartphone Only							
Smartphone Only Respondents	40%	12%	28%	12%	27%	38%	18%

*Smaller-response population group has a margin of error above 5.0% s so only substantially different survey responses from the average are meaningful.

Internet Assistance and Concerns – Question 12 Table

Question about concerns with internet usage.

	Q12. Which concerns do you have about internet use?						
	Security of personal infor-mation	Negative influences (i.e. cyber-bullying)	Getting viruses on my computer	Websites tracking me/us	Misleading infor-mation	Surveillance	No concerns
Unweighted Responses	80.9%	28.7%	66.2%	65.3%	54.6%	44.3%	9.7%
Weighted Responses by Household Income	**79.7%**	**29.6%**	**65.3%**	**64.0%**	**55.6%**	**43.8%**	**10.1%**
Household Income							
Less than $35,000	81%	30%	69%	66%	60%	49%	9%
$35,000 to under $74,999	82%	29%	69%	67%	56%	44%	9%
$75,000 to under $99,999	79%	30%	64%	64%	54%	41%	9%
$100,000 or more	77%	29%	58%	60%	52%	39%	12%
Age							
18-34	65%	31%	42%	54%	49%	40%	18%
35-64	78%	31%	64%	63%	52%	43%	11%
65 and over	91%	22%	79%	72%	62%	46%	3%
Race or Ethnicity							
White, alone	80%	28%	65%	64%	54%	42%	10%
Non-White	83%	35%	71%	68%	60%	53%	8%
Black or African American, alone	86%	32%	76%	69%	60%	51%	7%
Hispanic, Latino, or Spanish origin*	83%	43%	72%	65%	64%	54%	6%
Educational Attainment							
High school degree or GED	81%	27%	68%	63%	50%	43%	12%
Some college but no degree	80%	26%	68%	65%	56%	46%	9%
Associate's/Tech. degree	79%	27%	67%	65%	54%	46%	11%
Bachelor's degree or above	82%	30%	66%	66%	56%	43%	9%
Employment Characteristics							
Employed either full- or part-time	77%	30%	60%	62%	51%	42%	12%
Self-employed business owner	78%	29%	69%	64%	54%	44%	11%
Any employment challenge	82%	33%	71%	66%	63%	54%	8%
Selected Household Characteristics							
A child under 18 years in age	72%	44%	54%	56%	49%	40%	15%
A current or former U.S. armed forces member	84%	29%	71%	67%	59%	47%	8%
A person with a disability	84%	34%	72%	69%	61%	51%	7%
A person with limited English ability*	84%	46%	76%	71%	66%	51%	7%
A person that has been incarcerated at times*	78%	37%	71%	65%	65%	50%	9%
A person that has been homeless at times*	80%	41%	67%	62%	68%	54%	8%
Area							
Metro	83%	31%	67%	66%	57%	46%	8%
Nonmetro	78%	26%	66%	64%	51%	42%	12%
> Half of Served Locations with 25/3+ Mbps	82%	30%	66%	66%	55%	45%	9%
< Half of Served Locations with 25/3+ Mbps	77%	24%	66%	64%	51%	43%	12%
Smartphone Only							
Smartphone Only Respondents	77%	30%	60%	58%	50%	44%	13%

*Smaller-response population group has a margin of error above 5.0% so only substantially different survey responses from the average are meaningful.

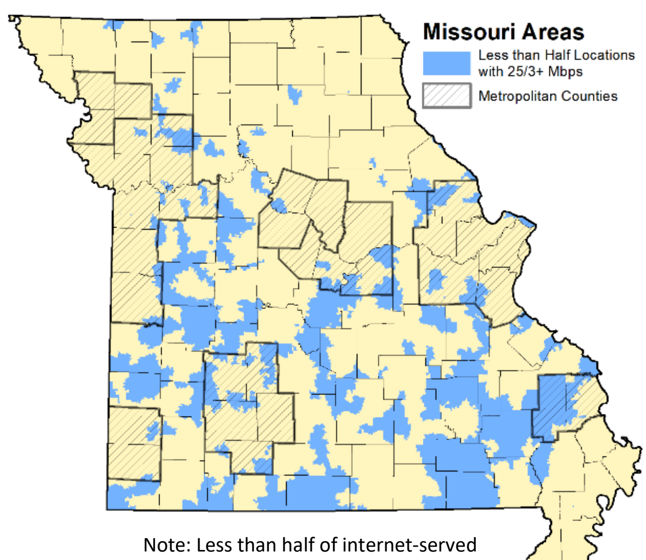
Appendix C: Focus Population Summaries

This survey sought the input of all Missouri adults to help guide the state's internet expansion and digital inclusion efforts. In addition, survey outreach was implemented to gather feedback from populations identified in the federal Digital Equity Act as groups that have been disproportionally impacted by digital inequity. Referred to as "**Focus Populations**" in this report, many of these groups are smaller so several steps were taken to increase the response levels for these populations (see survey methodology in the Introduction section for more details).

A summary for each of the eight focus populations is provided on the following pages. The focus populations are listed below, along with how they were identified for this report using respondent background information:

- **Low-Income Households**: defined by respondents with a household income of less than $35,000.
- **Veterans:** defined by respondent households with a current or former U.S. armed forces service member.
- **Aging Populations:** defined by a respondent aged 65 or older.
- **People with Disabilities:** defined by respondent households with a disabled person.
- **Incarcerated Individuals:** defined by respondent households with a person that has been incarcerated at times.
- **People with Language Barriers:** defined by respondent households with a person that had limited English speaking or reading ability.
- **Racial and Ethnic Minorities:** defined by a respondent that identified as Non-White or as having Hispanic, Latino, or Spanish origin. Non-White includes a respondent who is not White, alone but either Black or African American, American Indian or Alaska Native, Asian-American or Asian, Native Hawaiian or Other Pacific Islander, other, or multiracial.
- **Rural Inhabitants:** defined by respondent households located outside of Missouri's metropolitan areas and therefore residing in nonmetropolitan counties. In addition, respondent households located in low-access zip codes were also considered rural in addition to poorly served; these low-access zip codes are defined as having less than half of internet-served locations with at least 25/3 Mbps service based on 2022 FCC data. Exhibit C1 highlights these areas in Missouri.

Exhibit C1: Missouri Metro/Nonmetro Areas and Low-Access Zip Codes



Note: Less than half of internet-served locations in a zip code have at least 25/3 Mbps service according to 2022 FCC data.

Low-Income Household Respondent Summary

Respondents with a household income of less than $35,000 were defined as Low-Income Households in this report. According to the U.S. Census Bureau, there are over 687,000 Missouri households (28% of all households) with income less than $35,000.

Internet Service Access and Adoption

- **Low-Income Households** were less likely to use a personal computer at home (78%) compared to the survey average (88%). Conversely, they had a higher tendency to rely solely on smartphones (12%) as opposed to all respondents (6%).
- Among the respondents in this population, 78% reported paying for home internet service, this was 9 percentage points lower than the survey average (87%).
- Compared to the survey average (4%), more respondents in the population chose not to purchase available internet service (10%).
- Low-Income Households without internet services were typically willing to pay $28 a month, compared to a $48 survey average. Respondents in this population were typically willing to pay $300 to buy/replace a computer, compared to a $460 average.

Internet Activities

- **Low-Income Households** were much less likely to *work from home at least 1day a week* (26%) or to use it for *online training* (34%), compared to the survey average (48% and 44%, respectively).
- Conversely, respondents in this focus population were more likely to *search/apply for jobs online* (38%) than the survey average (32%).
- Two out of three respondents used the internet to access *government* or *health services*, and slightly less than half used it for *educational needs* (48%). The use of these three services was between five to seven percentage points lower than the averages for all respondents.

Internet Assistance & Concerns

- On average, **Low-Income Households** were 10 percentage points more likely to have an interest in training or assistance than other survey respondents.
- Nearly half of respondents had an interest in *finding information and resources I trust* (46%) compared to the survey average (33%).
- *Online resources* were where most respondents in this population group would go for internet/device help (56%).
- Respondents were more likely to go to *local government – incl. libraries and schools* for assistance (35%) than other respondents (27%).
- *Personal information security* (81%), *computer viruses* (69%), and *website tracking* (66%) were the top three concerns for this population. Respondents were four to five percentage points more concerned than the average respondent with *misleading information* or *surveillance*.

Notes: U.S. Census Bureau, 2021 five-year summary used for population estimates. The typical cost is calculated by taking the middle value of each price range and multiplying it by the number of respondents to create an average.

Veteran Respondent Summary

Veteran respondents were households with a current or former U.S. armed forces service member. According to the U.S. Census Bureau, over 377,000 veterans live in Missouri and account for 8% of the state's population. Veteran survey respondents were generally higher income and older, with 43% aged 65 or older compared to the overall Missouri population (17%).

Internet Service Access and Adoption

- **Veteran Households** were more likely to use a personal computer at home (93%) compared to the survey average (88%) and less likely to rely solely on smartphones (4%) than the survey average (6%).
- Among the respondents in this population, 89% reported paying for home internet service, slightly more than the survey average (87%). Only 2% chose not to purchase available internet services compared to the 4% average for all respondents.
- Veteran Households without internet services were typically willing to pay $50 a month, compared to a $48 survey average. Respondents in this population were typically willing to pay $494 to buy/replace a computer, compared to a $460 average.

Internet Activities

- **Veteran Households** were less likely to *work from home at least 1day a week* (44%) or *search/apply for jobs online* (28%), compared to the survey average (48% and 32%, respectively). This is due to a greater share of retirees in this older respondent population.
- Conversely, respondents in this focus population were slightly more likely to use it for *online training* (46%) than the survey average (44%).
- Three out of four respondents used the internet to access *government* or *health services* (74%), slightly above the survey averages, and half used it for *educational needs* (50%).

Internet Assistance & Concerns

- Excluding work-related help, **Veteran Households** were an average of 2 percentage points more likely to have an interest in training or assistance than other survey respondents.
- *Finding information and resources I trust* was of interest to 38% of veteran respondents compared to the survey average (33%). One in three respondents had an interest in *setting up or using new devices* (32%), compared to other respondents (28%).
- *Online resources* were where most respondents in this population group would go for internet/device help (58%), followed by *my internet service provider* (46%).
- *Personal information security* (84%), *computer viruses* (71%), and *website tracking* (67%) were the top three concerns for this population. Apart from *negative influences*, respondents were approximately four percentage points more concerned than the average respondent with internet usage.

Notes: U.S. Census Bureau, 2021 five-year summary used for population estimates. The typical cost is calculated by taking the middle value of each price range and multiplying it by the number of respondents to create an average.

Aging Population Respondent Summary

Aging populations are defined by a respondent aged 65 or older in this report. According to the U.S. Census Bureau, there are over 1,033,000 Missouri residents (16.8% of the population) that are aged 65 or older, a slightly higher proportion than the U.S. average (16%).

Internet Service Access and Adoption

- **Aging Populations** were slightly more likely to use a personal computer at home (90%) compared to the survey average (88%) and less likely to rely solely on smartphones (4%) than the survey average (6%).
- Among the respondents in this population, 91% reported paying for home internet service compared to the survey average (87%). Only 3% chose not to purchase available internet services compared to the 4% average for all respondents.
- Aging Populations without internet services were typically willing to pay $39 a month, compared to a $48 survey average. Respondents in this population were typically willing to pay $471 to buy/replace a computer, compared to a $460 average.

Internet Activities

- **Aging Populations** were much less likely to *work from home at least 1day a week* (25%) or to use it for *online training* (27%), compared to the survey average (48% and 44%, respectively). This is due to a greater share of retirees in this respondent population.
- Two out of three respondents used the internet for social networking (67%), but this was significantly lower than the survey average (83%). Only 30% used the internet for educational needs, compared to 54% for all respondents.
- Most respondents in this population used the internet to access *government* or *health services* (70% and 73%, respectively).

Internet Assistance & Concerns

- Nearly half of the **Aging Population** respondents were interested in training or assistance with *setting up or using new devices* (46%), the highest of any focus population and well above the survey average (28%).
- Four out of ten respondents had an interest in *finding information and resources I trust* (43%), ten percentage points more than the survey average (33%).
- *Online resources* were where most respondents in this population group would go for internet/device help (57%), followed by *my internet service provider* (49%).
- Respondents were slightly more likely to go to *local government – incl. libraries and schools* for assistance (29%) compared to the survey average (27%).
- *Personal information security* (91%), *computer viruses* (79%), and *website tracking* (72%) were the top three concerns for this population. Apart from *negative influences*, respondents were approximately eight percentage points more concerned than the average respondent with internet usage.

Notes: U.S. Census Bureau, 2021 five-year summary used for population estimates. The typical cost is calculated by taking the middle value of each price range and multiplying it by the number of respondents to create an average.

Disabled Household Respondent Summary

This focus population is defined by respondent households with a disabled person. According to the U.S. Census Bureau, there are nearly 867,000 disabled Missourians (14.4% of the population). Disabled Household respondents were typically lower income; compared to all Missouri households classified as low income (28%), more than one-third (37%) of Disabled Households had an income below $35,000.

Internet Service Access and Adoption

- Most **Disabled Households** used a personal computer at home (87%), slightly less than the survey average (88%).
- Like the survey average, a majority reported paying for home internet service (87%) and only a small portion chose not to purchase available internet services (4%).
- Disabled Households without internet services were typically willing to pay $36 a month, compared to a $48 survey average. Respondents in this population were typically willing to pay $414 to buy/replace a computer, compared to a $460 average.

Internet Activities

- **Disabled Households** were less likely to *work from home at least 1day a week* (43%) compared to the survey average (48%).
- Conversely, respondents in this population were more likely to use it for *online training* (46%) and to *search/apply for jobs online* (37%), compared to the survey average (44% and 32%, respectively).
- Four out of five respondents used the internet to access *health services* (80%), well above the survey average (72%). This population was also more likely to access *government services* (76%) than the average respondent (72%).
- More than half of Disabled Households used the internet for *educational needs* (55%), comparable to the survey average (54%).

Internet Assistance & Concerns

- On average, **Disabled Households** were 5 percentage points more likely to have an interest in training or assistance than other survey respondents.
- Nearly four out of ten respondents had an interest in *finding information and resources I trust* (39%), significantly higher than the survey average (33%). Nearly one out of three were interested in *accessing health care resources* (31%), six percentage points higher than the survey average (25%).
- *Online resources* were where most respondents in this population group would go for internet/device help (58%), followed by *my internet service provider* (44%).
- Respondents were more likely to go to *local government – incl. libraries and schools* for assistance (33%) compared to the survey average (27%).
- *Personal information security* (84%), *computer viruses* (72%), and *website tracking* (69%) were the top three concerns for this population. On average, respondents in this population were six percentage points more concerned than the average respondent with internet usage.

Notes: U.S. Census Bureau, 2021 five-year summary used for population estimates. The typical cost is calculated by taking the middle value of each price range and multiplying it by the number of respondents to create an average.

Formerly Incarcerated Respondent Summary

This focus population is defined by respondent households with a person that had been incarcerated in prior years. It is difficult to estimate population size, as it includes people who are no longer supervised by corrections officers, but it is conservatively more than 60,000 individuals. Formerly Incarcerated Household respondents were typically lower income; compared to all Missouri households classified as low income (28%), nearly half (48%) of Formerly Incarcerated Households had an income below $35,000.

Internet Service Access and Adoption

- Most **Formerly Incarcerated Households** use a personal computer at home (88%), the same as the survey average (88%).
- Among respondents in this population, fewer reported paying for home internet service (80%) than the survey average (87%).
- Given the lower income levels of this population, it is likely that willingness to pay for internet services and a computer are comparable to **Low-Income Households**. Respondents without internet services were typically willing to pay $28 a month, compared to a $48 survey average. Low-Income Households were typically willing to pay $300 to buy/replace a computer, compared to a $460 average.

Internet Activities

- **Formerly Incarcerated Households** were less likely to *work from home at least 1day a week* (38%) compared to the survey average (48%).
- Conversely, respondents in this focus population were more likely to *search/apply for jobs online* (56%) than the survey average (32%). Three out of ten respondents used home internet to *run my business* (30%), more than average survey respondents (22%).
- Three out of four respondents used the internet to access *government* or *health services*. Formerly Incarcerated Households were more likely to use it for *educational needs* (62%) compared to the survey average (54%).

Internet Assistance & Concerns

- **Formerly Incarcerated Households** were 20 percentage points more interested in *gaining job skills online* (41%) than average survey respondents (21%).
- These respondents had more interest in *accessing education resources* (41%) and *using devices/internet to start or manage a business* (32%) compared to the survey average (23% and 19%, respectively).
- Respondents were more likely to go to *local government – incl. libraries and schools* for assistance (35%) than other respondents (27%).
- *Personal information security* (78%) was the top concern for this population. Respondents were more concerned with *misleading information* (65%) than the average respondent (56%).

Notes: The Missouri formerly incarcerated population estimate is informed by 2022 Missouri Department of Corrections report on supervised offenders. The margin of error for this population is +/- 7.1 due to smaller response numbers, so only large percentage differences from the survey average are meaningful. The typical cost is calculated by taking the middle value of each price range and multiplying it by the number of respondents to create an average.

Language Barrier Respondent Summary

Language Barrier households were defined as households with a person that had limited English ability. According to the U.S. Census Bureau, there are over 122,000 people, aged 5 or older, in Missouri that do not speak English "very well." Spanish-speaking individuals represent 43% of that population. Language Barrier Household respondents were slightly more likely to be lower income; 30% of these households had an income below $35,000 compared to all Missouri households classified as low income (28%).

Internet Service Access and Adoption

- Most **Language Barrier Households** use a personal computer at home (86%), slightly less than the survey average (88%).
- Comparable to the survey average, a majority reported paying for home internet service (86%) and only a small portion chose not to purchase available internet services (5%).
- Language Barrier Households were typically willing to pay $397 to buy/replace a computer, compared to a $460 average.

Internet Activities

- **Language Barrier Households** were nine to ten percentage points more likely to *teleconference* (65%), do *online training* (53%), *search/apply for jobs online (42%)*, and *run my business* (33%) than average survey respondents.
- Half of the respondents in this focus population *work from home at least 1day a week* (50%), slightly more than the survey average (48%).
- Seven out of ten Language Barrier Households used the internet to access *government services* (72%). Fewer respondents used it to access health services (62%), especially compared to the survey average (72%).
- Language Barrier Households were twenty-two percentage points more likely to use it for *educational needs* (76%), compared to the survey average (54%).

Internet Assistance & Concerns

- **Language Barrier Households** were eighteen percentage points or more interested in *accessing education resources* (47%), *gaining job skills online* (39%), and *using devices/internet to start or manage a business* (37%) than the average survey respondent (23%, 21%, and 19%, respectively).
- One out of three respondents in this focus population were interested in *accessing health care resources* (34%) compared to the survey average (25%).
- Respondents were more likely to go to *local government – incl. libraries and schools* for assistance (35%) than other respondents (27%).
- *Personal information security* (84%) was the top concern for this population. Respondents were more concerned with *negative influences* (46%) than the average respondent (30%).

Notes: U.S. Census Bureau, 2021 five-year summary used for population estimates. The margin of error for this population is +/-8.4 due to smaller response numbers, so only large percentage differences from the survey average are meaningful. The typical cost is calculated by taking the middle value of each price range and multiplying it by the number of respondents to create an average.

Non-White Respondent Summary

This focus population of racial and ethnic minorities is defined by respondents that identified as Non-White or of Hispanic, Latino, or Spanish origin. According to the U.S. Census Bureau, there are over 1.2 million Non-White Missourians (20% of the population) and nearly 272,000 persons of Hispanic or related origin. Non-White Household respondents were more likely to be lower income; 32% of these households had an income below $35,000 compared to all Missouri households classified as low income (28%). Due to the smaller number of Hispanic or related respondents, Non-White respondent information is summarized below.

Internet Service Access and Adoption

- **Non-White Households** were a little less likely to use a personal computer at home (85%) compared to the survey average (88%). Conversely, they had a higher tendency to rely solely on smartphones (8%) as opposed to all respondents (6%).
- Among the respondents in this population, 89% reported paying for home internet service, slightly more than the survey average (87%). Comparable to the survey average, only a small portion chose not to purchase available internet services (5%).
- Non-White Households were typically willing to pay $397 to buy/replace a computer, compared to a $460 average.

Internet Activities

- More than half of the **Non-White Households** used the internet to *work from home at least 1day a week* (55%) and for *online training* (51%), compared to the survey average (48% and 44%, respectively).
- Respondents in this focus population were also more likely to *search/apply for jobs online* (44%) than the survey average (32%).
- Nearly three out of four respondents used the internet to access *government* or *health services* (74% and 73%, respectively). Respondents were nine percentage points more likely to use it for *educational needs* (63%) compared to the survey average (54%).

Internet Assistance & Concerns

- On average, **Non-White Households** were 9 percentage points more likely to have an interest in training or assistance than other survey respondents.
- Non-White Households had significantly more interest in *gaining job skills online* (36%) than other respondents (21%).
- Respondents in this focus population were much more likely to go to *local government – incl. libraries and schools* for assistance (46%) than the survey average (27%).
- *Personal information security* (83%), *computer viruses* (71%), and *website tracking* (68%) were the top three concerns for this population. Respondents were nine percentage points more concerned with *surveillance* (53%) than the average respondent (44%).

Notes: U.S. Census Bureau, 2021 five-year summary used for population estimates. The typical cost is calculated by taking the middle value of each price range and multiplying it by the number of respondents to create an average.

Rural Nonmetro Respondent Summary

This focus population is defined by households located in Missouri's nonmetropolitan (nonmetro) counties. In addition, Low-Access Households located in zip codes with low broadband availability were also considered rural along with poorly served; these zip codes had less than half of internet-served locations with 25/3 Mbps or greater service. Nonmetro survey respondents were generally older, with 27% aged 65 or older compared to the overall population (17%).

Internet Service Access and Adoption

- Most **Rural Nonmetro Households** used a personal computer at home (89%), slightly more than the survey average (88%).
- Among Nonmetro Household respondents, 85% reported paying for home internet service compared to the survey average (87%). In Low-Access Households, only 82% paid for service.
- Comparable to the survey average, only a small portion chose not to purchase available internet services (3%).
- Rural Nonmetro Households without internet services were typically willing to pay $50 a month, compared to a $48 survey average. Respondents in this population were typically willing to pay $454 to buy/replace a computer, compared to a $460 average.

Internet Activities

- **Rural Nonmetro Households** were slightly less likely to *work from home at least 1day a week* (46%) compared to the survey average (48%).
- Conversely, respondents in this population were more likely to use the internet for *running my business* (26%) compared to the survey average (22%).
- Most respondents used the internet to access *health* and *government services* (67% and 64%, respectively), but at levels five to eight percent points lower than the survey averages (72%).
- More than half of Rural Nonmetro Households used the internet for *educational needs* (52%), slightly lower than the survey average (54%).

Internet Assistance & Concerns

- **Rural Nonmetro Household** responses were generally comparable with the survey average, with *finding information and resources I trust* the top interest (30%), a few percentage points below the average respondent (33%). *Gaining job skills online* was of least interest (16%) compared to a survey average (21%), likely due in part to the older age profile of this population group.
- *Online resources* were where most respondents in this population group would go for internet/device help (55%), followed by *my internet service provider* (41%).
- Respondents were eight percentage points less likely to go to *local government – incl. libraries and schools* for assistance (19%) compared to the survey average (27%).
- *Personal information security* (78%), *computer viruses* (66%), and *website tracking* (64%) were the top three concerns for this focus population.

Notes: U.S. Census Bureau, 2021 five-year summary used for population estimates. The typical cost is calculated by taking the middle value of each price range and multiplying it by the number of respondents to create an average.