Executive Summary

As part of its efforts to perform a comprehensive evaluation of broadband gaps—in access, affordability, and skills—affecting low-income and other populations, the City of Bloomington conducted a mail survey of residents in the spring of 2020. In addition to gathering data about usage of services by City residents and their willingness to switch, the survey asked questions designed to provide insights into questions about residents’ ability to use broadband effectively.

To this larger end, the survey sought insights into a range of topics including price sensitivity, self-assessments of internet skills, levels of acquisition of subsidized services, and whether respondents or children under their care were able to avoid security risks and harmful content online. This report documents the survey process, presents results, and provides key findings intended to help the City of Bloomington assess the computer and broadband needs of its residents.

Key survey findings include:

- **Residents are highly connected**
  Ninety-three percent of Bloomington households have some form of internet connection. Eighty-eight percent of residents have home internet service and 84 percent have a cellular/mobile telephone with internet. Most (96%) respondents access the internet from any location, including outside the home. However, 12 percent of respondents from very low-income households (less than $25,000 per year) say they never access the internet, even from outside the home.

- **Low-income households are much more likely to lack internet access**
  While Bloomington residents in generally well connected, the picture is different for lower-income residents. Seventeen percent of low-income households (less than $25,000 per year) report not having internet access at home. This is more than double the eight percent of the respondents in the $25,000-$49,900 category and far higher than low single-digit percentages reported by people in higher income categories.

- **Many low-income households depend on a smartphone for internet access**
  Fifteen percent of those earning under $25,000 annually report only using a smartphone for home internet access—triple the percentage of all respondents. This may limit their ability to fully utilize online services at home.

- **Subsidized internet services are not having a significant impact**
  Uptake of subsidized services appears very low. Only 14 percent of low-income Comcast subscribers reported participating in Comcast’s Internet Essentials subsidized programs. This suggests a potential opportunity for City intervention to identify eligible users and connect them with subsidy programs.
• **Caregivers report significant concerns with respect to risks to minor children associated with the internet**
  Sizable percentages of respondents with minor children disagreed or strongly disagreed their children can avoid false or misleading information online (48%), online bullying (38%), online financial scams or predators (46%), and graphic violence or pornography (46%).

• **Many caregivers report lacking the ability to protect minor children from online harms**
  Nearly two-thirds of respondents (63%) agreed or strongly agreed they have the time and skills to protect their children from these risks, but this leaves a significant number of respondents who did not agree or strongly agree with those self-assessments. Percentages were similar across income categories.

• **Lower income residents in particular report lacking desired computing skills or sufficient ability to recognize online threats**
  Lower-income residents reported lower levels of skills in managing their computing devices or contending with a wide range of online threats. For example, more than 25 percent of respondents with household income of less than $50,000 per year disagreed or strongly disagreed that they know how to recognize and avoid a phishing scam. The rate for people from households making more than $100,000 per year was only five percent. As such it is likely that lower-income residents are significantly more vulnerable to being victimized by online scams.

• **Lower-income residents express somewhat more desire for help gaining online skills and confidence**
  Lower-income residents expressed somewhat more interest than their higher-income peers in becoming more confident in using computers and the internet and in attending free or inexpensive classes. Respondents from the lowest-income group (less than $25,000 household income) tended toward agreement with the statement that they would like to become more confident (with an average response of 3.5 on a scale of 1 to 5), but respondents in the highest income group tended toward disagreement with this statement (2.6 on a scale of 1 to 5).

• **A “homework gap” is a significant problem for those with only lower speed internet**
  More than one-fourth (27%) of internet users with a lower-speed connection (cellular/mobile, satellite, dial-up) strongly agreed that their minor children cannot complete their homework because they do not have access to the internet or to computers. We note that this figure may under-represent difficulties students may be having within their homes, because some of the students with lower-speed connections may be able to complete their homework by “borrowing” internet access at public or private hotspots or other locations.
• **The skills gap is pronounced among low income and older residents**
  Respondents ages 55 and older and those earning less than $25,000 per year were less likely than younger respondents to agree that they are skilled in various uses of the internet.

• **Internet at home is increasingly a critical requirement for middle and higher income work**
  One-half of respondents said their job requires them to have internet access at home, including 36 percent of internet users who use cell phones, satellite, or dial-up services for their home service.

• **Lack of need for internet in lower paid/skilled jobs can increase digital inequality**
  Low-income households are less likely than higher income households to report needing the internet for their job, telecommuting, or education. If those respondents see less relevance for internet access and computing skills and have less confidence and practice with using such skills, this may become a barrier for being prepared for and having access to higher paying jobs.

• **There is broad support for the city having an active role in ensuring affordable broadband**
  Overall, respondents expressed support for the City ensuring access to competitively priced broadband services, with 64 percent of respondents strongly agreeing. One-fourth of respondents disagreed or strongly disagreed that the market currently offers affordable high-speed internet service.