

# Digital Equity in Arlington County

Survey Findings

# Overview

# What We Learned

1. Of the group we surveyed, most users (77%) connect to the internet by phone, tablet, or laptop.
2. Almost half of Arlington County residents pay \$100 or more for internet.
3. 37% of households experience some connectivity problems, especially larger households.
4. Connectivity problems have been exacerbated during the pandemic.
5. Entertainment, jobs, and schooling lead the wish list for more bandwidth.
6. Financial priorities focused on improved choice and quality.
7. There is disparity in how first-generation residents use internet.
8. Residents identified five areas where they'd like to see improvement.



## **The COVID Effect: The pandemic highlighted the digital divide**

- COVID-19 is driving demand for better broadband in ways that could not have been anticipated before March. This is especially evident in parts of the County with many apartment buildings and more minority residents.
- Half of Arlington County households with school-age children reported there is sometimes insufficient broadband to support their devices.
- Demand for better service is especially common for residents in older apartment buildings often found in ZIP codes 22203, 22204, and 22206. Problems with connectivity are also more common in households with three or more members.



# Methodology

# Quantitative Methodology

- Robert Green with Pierrepont Consulting conducted the survey:
  - Survey dates: June 18–21, 2020
  - 200 telephone interviews of Arlington County residents (n=200)
  - Oversamples of interviews in ZIP codes 22203, 22204, and 22206
  - Overall margin of error: +/- 6.9% at the 95% confidence level
  - Interviews conducted in English and Spanish
  
- Arlington County residents shared opinions on these issues:
  - The current state of their broadband service
  - Changes in usage since the COVID-19 declaration in March 2020
  - Connectivity concerns related to distance learning, especially for households with school-age children
  - Desired changes in service
  - Trade-offs in terms of service versus cost priorities



# Qualitative Methodology

- Moderators included Amy Kauffman for English-speaking groups and Carlos Alcazar for Spanish-speaking groups.
- Between June 8 and June 12, 2020, we interviewed 28 County residents.
  - 8 online focus groups
  - 3 one-on-one interviews
- Panelists embodied the following characteristics:
  - Minority community households
  - Lower- or fixed-income households\* (typically older adults)
  - Individuals with disabilities
- 28 individuals represented a mix of white, Black, Hispanic, Middle Eastern, and Asian ethnicities.

\* “Lower-income” was defined as those who qualify for County services.



# Key Findings

# 1. Devices: 77% of residents use a cellphone, laptop, or tablet to connect

Which devices that connect to the internet do you use most often?

74% of households have four or more devices

\$150 or more monthly internet bill households:

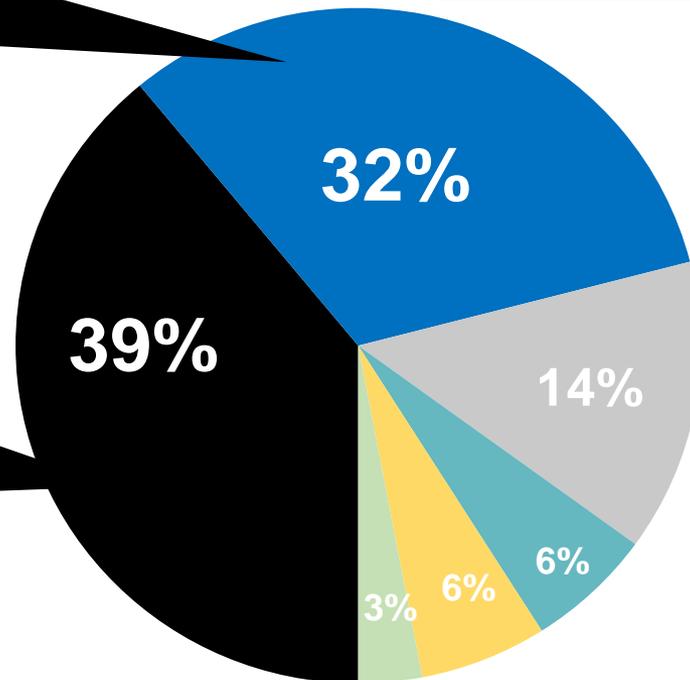
42% use laptop most

31% use cellphone most

\$50 or less monthly internet bill households:

57% use cellphone most

19% use laptop most

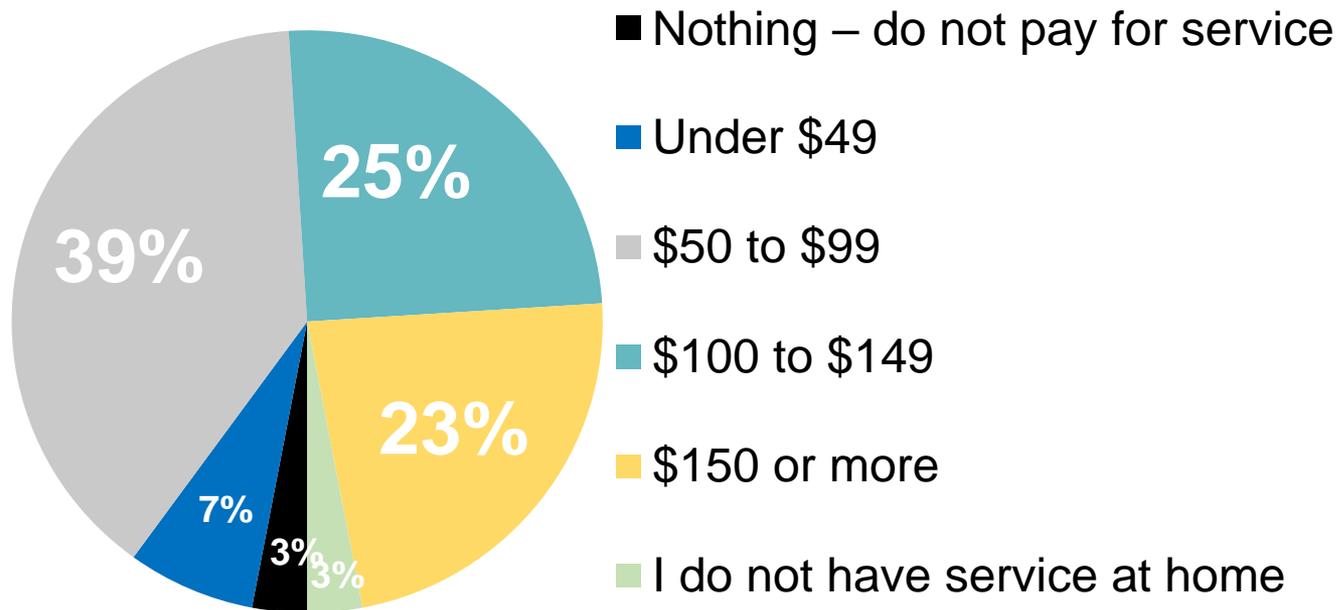


- Cell phone
- Laptop
- Desktop computer
- Tablet
- Television
- Don't know



## 2. Cost and Choices: Almost half (48%) of County households pay \$100 or more monthly for internet, another 39% pay \$50-\$99 monthly

What are you currently paying for your Wi-Fi?

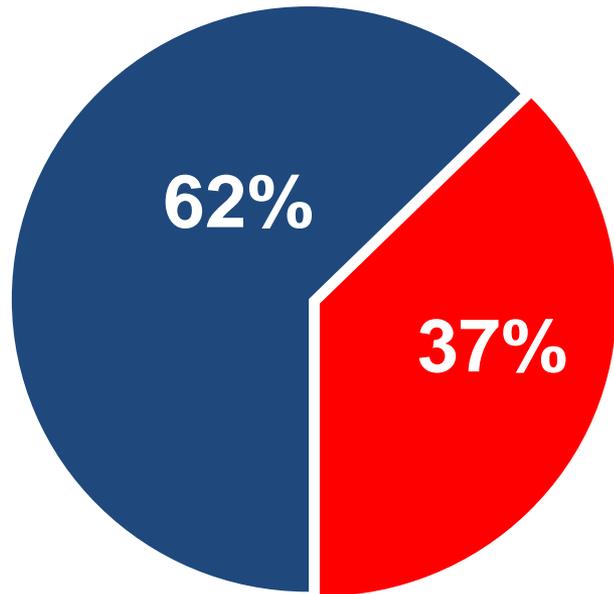


65% of County residents say their internet service is provided by Verizon, another 32% say Comcast. In ZIP codes 22203, 22204, and 22206, 43% say Comcast/Xfinity.



### 3. Households, many with children or older adults, reported unreliable connectivity

Is there enough Wi-Fi to support multiple devices in your home or do you have trouble sometimes with maintaining a connection with the internet?



■ Always enough Wi-Fi to support multiple devices

■ Sometimes trouble with enough Wi-Fi to support multiple devices

Houses with school-age children experience connectivity issues 50% of the time. This pre-existing problem was made much worse by COVID-19.

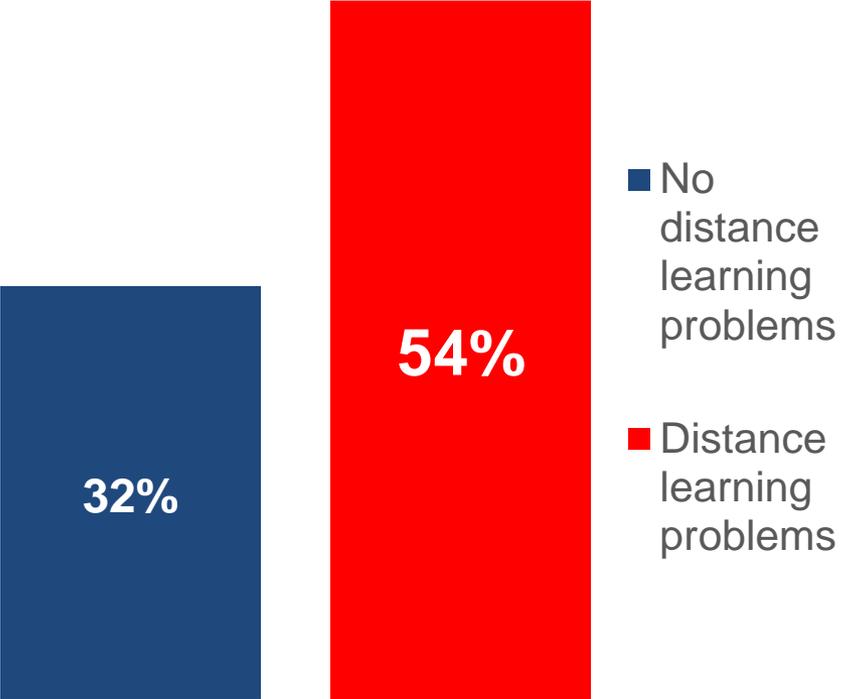
Focus group participants (all with lower or fixed incomes) commonly reported:

- Connectivity issues in older apartment buildings
- Inability for school-age children to fully participate in class due to spotty or worse connectivity



# 4. The COVID effect exacerbated connectivity problems, especially while distance learning

Have you had to share devices so that you or your kids had a way to learn at school online?



Selected "yes" for sharing devices with children

### THE COVID Effect:

Distance learning and free tablets accentuated pre-existing problems related to bandwidth and connectivity for many residents.

Adults are working from home, and their K-12 children are simultaneously attempting similar heavy-duty broadband demands for school.

This confluence of events spurred focus group panelists to raise issues of cost, choice, and demand for low-cost options (e.g., Comcast Internet Essentials).

**Digital inequity is now tangible.**

In focus group settings, we heard people ask for:

- Greater choice
- Lower cost
- Affordable (if not free) internet as part of affordable housing



## 5. Bandwidth Wish List

If you could increase the amount of bandwidth at no additional cost, what would you do more of on the internet?

Entertainment (39%)



Jobs (26%)



Schoolwork (17%)



News (15%)



Seminars/classes (15%)



Email (13%)



Social networking (10%)



Pandemic research (8%)



## 6. Financial Priorities

- Focus groups and polling confirm that reliable broadband has become a necessity for work, entertainment, education, and civic activities post-COVID.
- Many modest-income County households are scraping by at best as they've seen their hours cut or job disappear due to COVID. Many of them are paying \$100 or more per month for internet service.
- Not surprisingly, panelists tell us they want more internet service provider competition, more low-cost plan choices like Internet Essentials, affordable broadband paired with affordable housing, and free internet services such as hot spots.
- In the poll, we asked participants to rank their household bill pay priorities. Rent/mortgage is ranked highest (63%), then electricity. Water and groceries tie for third (18%). Thirteen percent rank cable/internet as a top three priority.



## Pricing and consistent quality are the most important issues

- Residents with spotty Internet (63%), those with children (60%), and those who pay \$49 or less monthly for internet service (60%) are especially likely to say broadband quality matters more than cost. Another 1 in 4 (24%) say price matters more. Households with three or more members (32%) and device-sharing residents (34%) are more likely to say price.
- The last question we asked our lower- and fixed-income panelists was “Since the start of COVID-19 stay-at-home orders, what has become the most important to you regarding your home internet service?” Those without children at home tend to prefer lower cost; those with school-age children prefer better broadband, meaning less buffering with more devices logged on. (Better access means a more stable connection.) Here’s how the focus group votes tallied:

▪ Better pricing	12
▪ Better quality broadband	9
▪ Better access	3
▪ More training	1
▪ Did not answer	3



## 7. First-Generation Internet Equity Issues: For some residents, cellphone use is a de facto substitute for home internet

- In focus groups, we saw how digital equity issues may play out among many first-generation residents.
- Though not statistically reliable, these focus group discussions did shed light on differences among first-generation residents. Some placed more emphasis high-speed and reliable home service for broadband-enabled opportunity. Other first-generation residents are more cellphone-oriented.
- Many first-generation and other County residents would benefit from digital opportunity education involving distance learning, telehealth and to create new avenues for personal progress and development. What 5G (once available) makes possible would also be of interest.



## 8. Residents identified five areas in which to address digital inequity

- Encourage competition from multiple providers to give residents choices.
- Publicize Internet Essentials more widely in low-income and minority communities.
- Offer free or greatly reduced-cost Wi-Fi for the most basic plans to provide choices beyond Internet Essentials.
- Improve broadband quality and dependable connectivity in older buildings.
- Expand outreach efforts to communities that speak languages other than English to address and improve issues of digital relevance, education, and training.

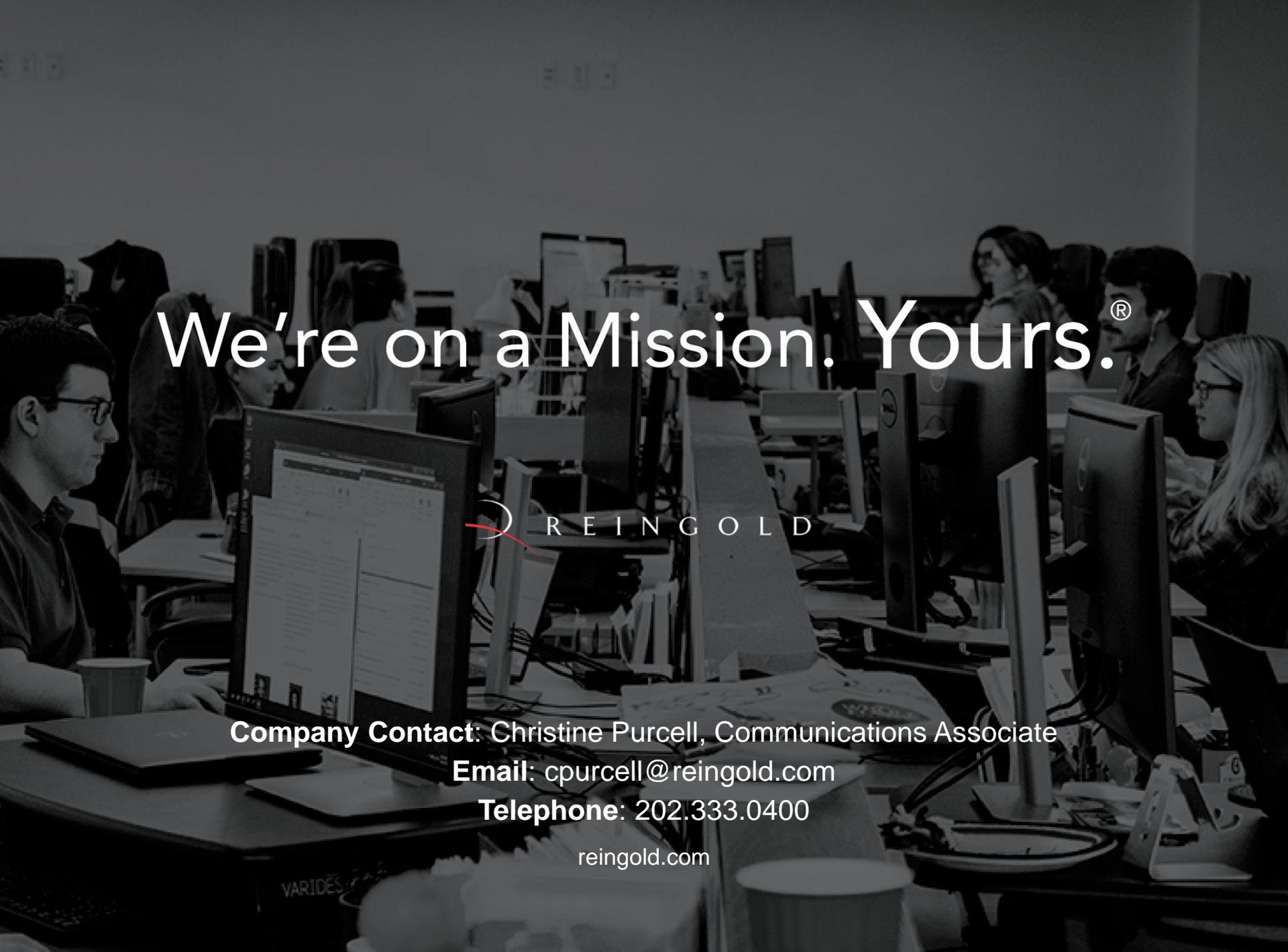


# Considerations for the County

# Potential Considerations

- Allow more service providers, especially for apartment residents.
- Create affordable housing that includes affordable broadband.
- Launch and expand outreach and education efforts to first-generation communities speaking languages other than English as well as older residents.
- Improve capabilities in older buildings, complexes, and senior centers.
- Consider becoming a “smart,” or “smarter,” city by increasing the free outdoor Wi-Fi access points.





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**Company Contact:** Christine Purcell, Communications Associate

**Email:** [cpurcell@reingold.com](mailto:cpurcell@reingold.com)

**Telephone:** 202.333.0400

[reingold.com](http://reingold.com)

# Appendix

## ***Connectivity: Definitions, Impacts, and COVID***

## Research Objective

***The objective of this research is to assess the current state of digital connectivity and identify any barriers preventing Arlington County residents from access to and usage of digital tools and resources.***

# Lack of connectivity, often involving cost and limited choice, drives digital inequity the most

- Arlington County seeks digital equity for all its residents and to address the causes of digital inequity within the County.
- **Equity** refers to the assurance that all individuals have the digital technology access, capacity, and understanding to use the internet effectively.
- **Digital equity** is more than being connected to the internet — it also involves affordable broadband service and having access to functional devices.
- **Digital inequity** is driven by a lack of connectivity, involving cost and limited choices.



# Connectivity: What It Is and Why It Matters

- Connectivity involves sufficient online capacity for digital platforms, systems, and applications to work together quickly and seamlessly.
- Connectivity matters in Arlington County:
  - It is the most urban and densely populated county in Virginia.
  - It will soon become the second headquarters of Amazon.
  - The County could build on its successes by being a digital leader and model for the metropolitan area, the state, and perhaps even the nation.
- Increasingly, Arlington County residents need connectivity for online activities such as:
  - Commerce
  - Work
  - Job searches
  - Education/distance learning
  - Telehealth
  - Faith
  - Entertainment
  - News
  - Social interaction
  - Civic engagement



# COVID-19 confirms that reliable connectivity is essential, like electricity and safe drinking water

- The importance of reliable connectivity in Arlington County has been underscored by the COVID-19 pandemic.
- Federal, state, and local governments have encouraged and at times mandated businesses, government offices, and schools to close and have restricted access to high-risk places such as senior centers.
- Social distancing measures may be in place for the months or years to come.
- The ongoing coronavirus crisis has made it obvious that digital equity in Arlington County is as essential as dependable electricity or safe drinking water.

