

Internet Access and Affordability Needs for Covered Populations

1. Low-income households (household income no more than 150% of federal poverty threshold)

Access. People in lower-income households have less access to high-speed internet at home compared to the general population. The 2023 Digital Equity Survey found **only 78% of low-income individuals reported having a home internet subscription** compared to 86% of the general population, and 28% primarily accessed it through a mobile data plan. Low-income individuals were more likely than other covered populations to go elsewhere to access internet services (e.g., McDonalds, coffee shops) or rely on a prepaid mobile data plan (9%). Four percent reported not using the internet at all.

| | Home Internet Subscription | Pick up Free Wi-Fi | Mobile Data Plan | Prepaid mobile data plan | Borrow hotspot | Go Elsewhere for internet | Don't use the internet |
|-------------------|----------------------------|--------------------|------------------|--------------------------|----------------|---------------------------|------------------------|
| Overall | 86% | 28% | 5% | 5% | 2% | 6% | 3% |
| Low Income | 78% | 7% | 7% | 9% | 3% | 9% | 4% |

Affordability. Low-income populations were less likely than the general public to consider the cost of their home (20%) or mobile (29%) internet service to be affordable in their research on digital equity, Tinubu Ali and Herrera (2020) found that 21% of families earning less than \$40,000 per year had no home internet. Even with additional funding and support, lower-income households will continue to need support due to the instability that comes with having a low income (Davis et al., 2023).

How affordable is your monthly internet bill? (Home Internet)

| | Affordable | Somewhat affordable | Not affordable | Don't have this service | |
|---------------|-------------------|---------------------|----------------|-------------------------|----|
| Home | Overall | 27% | 50% | 17% | 6% |
| | Low Income | 20% | 47% | 24% | 9% |
| Mobile | Overall | 34% | 47% | 12% | 6% |
| | Low Income | 29% | 45% | 17% | 9% |

Preventing Access. When examining what is preventing individuals from accessing the internet in their homes, low-income households were more likely than the general population to indicate that **internet service is too expensive (46%)**, they don't know how to use the internet (13%), don't want internet service (10%), or lack a digital device to access the internet (13%). They were less likely than the general population to indicate that service was not available (29%) or was available but didn't work well enough to meet their needs (18%).

What is preventing you from accessing the internet in the home?

| | Internet is too expensive | Internet is not available | Internet is available but does not work well enough for my needs | Don't know how to use the internet | Don't want internet at my house | Don't have a digital device to connect to the internet |
|-------------------|---------------------------|---------------------------|--|------------------------------------|---------------------------------|--|
| Overall | 27% | 27% | 17% | 7% | 7% | 7% |
| Low-Income | 46% | 29% | 18% | 13% | 10% | 13% |

2. Aging individuals

Access. Aging individuals were more likely than the general population to utilize home internet services as the primary way to get online (88%). They were also less likely to utilize other ways to get online such as a mobile data plan (25%), a prepaid plan (3%), go somewhere else (4%), or borrow a hotspot (1%). Only 3% of individuals 60 and older indicated that they do not use the internet at all.

How do you and other members of your household primarily connect to the internet in your home? (Select all that apply)

| | Home Internet Subscription | Mobile Data Plan | Prepaid mobile data plan | Go Elsewhere for internet | Pick up Free Wi-Fi | Borrow a hotspot | Don't use the internet |
|--------------------------|----------------------------|------------------|--------------------------|---------------------------|--------------------|------------------|------------------------|
| Overall | 86% | 28% | 5% | 5% | 2% | 6% | 3% |
| Aging Individuals | 88% | 25% | 5% | 4% | 1% | 4% | 3% |

Affordability. Affordability for adults 60 years and over aligns very closely with overall survey results with most finding home (80%) and mobile (83%) internet service either somewhat or very affordable. While most find the service affordable, aging individuals are more likely to be more concerned with the cost of the experience rather than the benefits of using the internet (Ma et al., 2020) and future efforts should consider this when working with aging individuals.

How affordable is your monthly internet bill? (Home Internet)

| | | Affordable | Somewhat affordable | Not affordable | Don't have this service |
|---------------|--------------------------|------------|---------------------|----------------|-------------------------|
| Home | Overall | 27% | 50% | 17% | 6% |
| | Aging Individuals | 29% | 51% | 16% | 4% |
| Mobile | Overall | 34% | 47% | 12% | 6% |
| | Aging Individuals | 37% | 46% | 10% | 7% |

Preventing Access. After cost (36%), the largest reason aging individuals don't access the internet is due to availability (30%). For others, the internet is available but doesn't meet their needs (18%). More aging individuals indicated that they didn't know how to use the

internet (14%) or didn't want the internet at their house (12%) when compared to the general population (9%).

What is preventing you from accessing the internet in the home?

| | Internet is too expensive | Internet is not available | Internet is available but does not work well enough for my needs | Don't know how to use the internet | Don't want internet at my house | Don't have a digital device to connect to the internet |
|--------------------------|---------------------------|---------------------------|--|------------------------------------|---------------------------------|--|
| Overall | 36% | 35% | 23% | 9% | 9% | 9% |
| Aging Individuals | 36% | 30% | 18% | 14% | 12% | 10% |

3. Incarcerated individuals

Access. Many inmates do not have regular access to computers or tablets, even for training or educational purposes, and individuals in re-entry are the most likely covered population to go somewhere other than their residence to pick up internet service (10%). They are also more likely to pick up free Wi-Fi outside (9%), borrow a hotspot (7%), or forgo using the internet altogether (5%). Only 65% indicated they had a home internet subscription and 48% had a mobile internet subscription or prepaid service.

Internet access is a primary concern for incarcerated individuals because, as a formerly incarcerated individual at the Durham County listening session shared, “as technology advances, we get lost.” In addition to helping them stay current with technological advances, access to technology such as tablets and cell phones can help incarcerated individuals remain connected with friends and family, increase their feelings of autonomy while incarcerated, and ease reintegration, thus reducing recidivism rates (Thaler et al., 2022). While some inmates are selected for competitive classes or are able to pay for internet access, which is often slow and highly restricted, a great number are denied access. Given the limited time they are allotted to use technology, and that the digital devices they have access to are often outdated, most of what they learn feels irrelevant by the time they are released.

One theme that emerged during the listening sessions is that access to devices and the internet while incarcerated would help with re-entry. A formerly incarcerated individual from Stanly County shared,

“Having access to the internet while still in prison probably would be my biggest thing that would have made me more successful coming out.”

How do you and other members of your household primarily connect to the internet in your home? (Select all that apply)?

| | Home Internet Subscription | Mobile Data Plan | Prepaid mobile data plan | Go Elsewhere for internet | Pick up Free Wi-Fi | Borrow a hotspot | Don't use the internet |
|------------------------------|----------------------------|------------------|--------------------------|---------------------------|--------------------|------------------|------------------------|
| Overall | 86% | 28% | 5% | 5% | 2% | 6% | 3% |
| Incarcerated/re-entry | 65% | 31% | 9% | 17% | 7% | 10% | 5% |

Affordability. When asked about internet affordability, incarcerated/reentry individuals were more likely to consider both home (22%) and mobile (24%) internet services unaffordable. They were also more likely to indicate that they did not subscribe to these services (18% home internet; 10% mobile internet).

When inmates are allowed access to the internet for personal use, the cost of connecting is quite high. A participant in a listening session composed of formerly incarcerated people gave the example of inmates earning approximately \$8 to \$16 dollars per month in prison but having to pay \$15 dollars for 25 hours of internet access. Affordability continues to be a concern after release as returning citizens often navigate re-entry with very limited funds. Listening session participants shared that while the state provides a small re-entry fund via debit card or check, users are charged a \$3-6 fee to access funds the on the debit card. Not having a valid ID upon release also means that they cannot open a bank account to cash the check. While there are programs, like the Affordable Connectivity Program, that provide more affordable internet, there is confusion about how to access them. Additionally, some programs provide returning citizens with pre-paid cell phones. Still, the process of getting those devices varies from organization to organization, and “certain counties are dead zones” where it is nearly impossible for returning citizens to access any re-entry resources.

“We [the prison] will set you up with the bus ticket and a \$45 check if you've done more than two years. So, if you don't think that, that doesn't want to make people go back to old habits and old lifestyles, it does. So, if we could, through these programs and laptops and internet set people up with jobs and apartments.”

How affordable is your monthly internet bill? - Home Internet

| | | Affordable | Somewhat affordable | Not affordable | Don't have this service |
|---------------|------------------------------|------------|---------------------|----------------|-------------------------|
| Home | Overall | 27% | 50% | 17% | 6% |
| | Incarcerated/ Reentry | 22% | 38% | 22% | 18% |
| Mobile | Overall | 34% | 47% | 12% | 6% |
| | Incarcerated/ Reentry | 32% | 34% | 24% | 10% |

Preventing Access. Inmates or newly released individuals without access to the internet in their homes are more likely to cite cost (47%) as the main factor followed by availability (38%). For many, one-quarter of those in prison or in re-entry, internet service is available

but doesn't work well enough to meet their needs (25%). For others, they don't know how to use the internet (13%) or don't want to use the internet (6%).

What is preventing you from accessing the internet in the home?

| | Internet is too expensive | Internet is not available | Internet is available but does not work well enough for my needs | Don't know how to use the internet | Don't want internet at my house | Don't have a digital device to connect to the internet |
|------------------------------|---------------------------|---------------------------|--|------------------------------------|---------------------------------|--|
| Overall | 36% | 35% | 23% | 9% | 9% | 9% |
| Incarcerated/re-entry | 47% | 38% | 25% | 13% | 6% | 0% |

4. Veterans

Access. Veterans disproportionately live in rural areas with limited internet access. While nearly all veterans who responded to the digital equity survey indicated that they accessed the internet through a home subscription (88%) and/or a mobile data plan (23%), others had to go elsewhere (5%), utilize a prepaid data plan (4%), pickup free Wi-Fi (4%), or borrow a hotspot (2%). Only 3% reported not using the internet at all.

How do you and other members of your household primarily connect to the internet in your home? (Select all that apply)

| | Home Internet Subscription | Mobile Data Plan | Prepaid mobile data plan | Go Elsewhere for internet | Pick up Free Wi-Fi | Borrow a hotspot | Don't use the internet |
|-----------------|----------------------------|------------------|--------------------------|---------------------------|--------------------|------------------|------------------------|
| Overall | 86% | 28% | 5% | 5% | 2% | 6% | 3% |
| Veterans | 88% | 23% | 4% | 4% | 2% | 5% | 3% |

Affordability. Some veterans have limited income due to disabilities or transitioning to civilian life. The cost of broadband services, which includes monthly subscription fees and equipment, can be a significant barrier. A resident in a listening session stated, "It's difficult to have internet at home because even being a veteran, there is no discount for us in these country areas, and I really want internet at home." While noted as a barrier in listening sessions, survey results indicate veterans felt both their home (30%) and mobile (38%) internet service was affordable, which is higher than that of the general population.

How affordable is your monthly internet bill? - Home Internet

| | | Affordable | Somewhat affordable | Not affordable | Don't have this service |
|---------------|-----------------|------------|---------------------|----------------|-------------------------|
| Home | Overall | 27% | 50% | 17% | 6% |
| | Veterans | 30% | 51% | 15% | 4% |
| Mobile | Overall | 34% | 47% | 12% | 6% |
| | Veterans | 38% | 44% | 10% | 8% |

Preventing Access. Thirty-eight percent of veteran respondents to the Digital Equity Survey who didn't have internet at home said they didn't connect at home because it was unavailable. Twenty-nine percent indicated internet service was too expensive and 15% percent said it was available but did not meet their needs. Residents from Tyrrell County shared,

“We need a representative or someone to keep in close contact with our veteran's office to make sure we are informed about any changes and help with better internet in our area.”

Many veterans live in rural or remote areas of North Carolina, where infrastructure is limited or nonexistent. Lack of access to high-speed internet can hinder their ability to access vital services, like healthcare.

What is preventing you from accessing internet in the home?

| | Internet is too expensive | Internet is not available | Internet is available but does not work well enough for my needs | Don't know how to use the internet | Don't want internet at my house | Don't have a digital device to connect to the internet |
|-----------------|---------------------------|---------------------------|--|------------------------------------|---------------------------------|--|
| Overall | 36% | 35% | 23% | 9% | 9% | 9% |
| Veterans | 29% | 38% | 15% | 9% | 9% | 8% |

5. Individuals with disabilities

Access. People living with disabilities that responded to the Digital Equity Survey were most likely to lack access to high-speed internet through a home subscription (85%) or a mobile data plan (28%) which is similar to the rates of the overall population. According to the American Immigration Council (2022), “In 2019, 37.1% of people with a disability in North Carolina did not have broadband internet at home. This is slightly higher than the national share of 35.9% of people living with disabilities who did not have broadband internet at home” (p. 7). Accessibility of websites was raised as a challenge for individuals with disabilities. A resident from a listening session stated, “people with disabilities will need websites and apps but will not receive the features they need if they're hard of hearing or need help with visuals.” Some websites, online platforms, and applications may not be designed with the proper accessibility in mind, which can make it challenging for this population to fully participate in activities like remote work or educational opportunities.

How do you and other members of your household primarily connect to the internet in your home? (Select all that apply)

| | Home Internet Subscription | Mobile Data Plan | Prepaid mobile data plan | Go Elsewhere for internet | Pick up Free Wi-Fi | Borrow a hotspot | Don't use the internet |
|----------------|----------------------------|------------------|--------------------------|---------------------------|--------------------|------------------|------------------------|
| Overall | 86% | 28% | 5% | 5% | 2% | 6% | 3% |

| | | | | | | | |
|--------------------------------------|-----|-----|----|----|----|----|----|
| Individuals with Disabilities | 85% | 28% | 6% | 6% | 2% | 7% | 3% |
|--------------------------------------|-----|-----|----|----|----|----|----|

Affordability. The cost of internet services, including monthly subscription fees and adaptive technology devices, can be prohibitive for individuals with disabilities. A resident from a listening session in Columbus County voiced,

“Paying for internet is having to give up a few other expenses every month, but it is still missing a few parts that could help me get connected.”

Most individuals with disabilities consider their internet generally affordable (22%) or somewhat affordable (51%); however, a significant portion find it unaffordable (21%). Mobile service was considered more affordable (31%) with 15% finding it unaffordable.

How affordable is your monthly internet bill? (Home Internet)

| | | Affordable | Somewhat Affordable | Not Affordable | Don't have this service |
|---------------|--------------------------------------|------------|---------------------|----------------|-------------------------|
| Home | Overall | 27% | 50% | 17% | 6% |
| | Individuals with Disabilities | 22% | 51% | 21% | 6% |
| Mobile | Overall | 34% | 47% | 12% | 6% |
| | Individuals with Disabilities | 31% | 47% | 15% | 7% |

Preventing Access. Internet service providers should ensure that their services are accessible to individuals with disabilities at an affordable rate. For individuals with disabilities that do not have internet service through their home, 47% said the internet was too expensive, not available (25%), or didn't work well enough to meet their needs (20%). Individuals with disabilities were also more likely than the average North Carolinian to indicate that they do not know how to use the internet (13%), don't want the internet at their home (10%), or don't have a digital device to connect to the internet (10%).

What is preventing you from accessing internet in the home?

| | Internet is too expensive | Internet is not available | Internet is available but does not work well enough for my needs | Don't know how to use the Internet | Don't want Internet at my house | Don't have a digital device to connect to the internet |
|--------------------------------------|---------------------------|---------------------------|--|------------------------------------|---------------------------------|--|
| Overall | 36% | 35% | 23% | 9% | 9% | 9% |
| Individuals with Disabilities | 45% | 25% | 20% | 13% | 10% | 10% |

6. Individuals with a language barrier, including individuals who are English learners

Access. The 2023 Digital Equity Survey found that 14% of individuals who speak a language other than English did not subscribe to a home internet subscription which is the same rate of subscription among the general population that took the survey. They were more likely than the average North Carolinian to rely on a mobile data plan (33%), prepaid plan (7%), pickup free Wi-Fi (6%), or borrow a hotspot (3%). Only 1% indicated that they do not use the internet.

How do you and other members of your household primarily connect to the internet in your home? (Select all that apply)

| | Home Internet Subscription | Mobile Data Plan | Prepaid mobile data plan | Go Elsewhere for internet | Pick up Free Wi-Fi | Borrow a hotspot | Don't use the internet |
|--|----------------------------|------------------|--------------------------|---------------------------|--------------------|------------------|------------------------|
| Overall | 86% | 28% | 5% | 5% | 2% | 6% | 3% |
| Language Barriers/ English Learners | 86% | 33% | 6% | 7% | 3% | 8% | 1% |

Affordability. When asked about their monthly internet bill, a just over one-quarter (26%) of English learners found their home internet affordable and 34% found their mobile internet plan affordable which mirrors the results from the general population. While most found their service either affordable or somewhat affordable, 17% noted their monthly home internet charges were too high and 15% indicated their mobile internet service was unaffordable.

How affordable is your monthly internet bill? - Home Internet

| | | Affordable | Somewhat Affordable | Not Affordable | Don't have this service |
|---------------|--|------------|---------------------|----------------|-------------------------|
| Home | Overall | 27% | 50% | 17% | 6% |
| | Language Barriers/ English Learners | 27% | 53% | 16% | 4% |
| Mobile | Overall | 34% | 47% | 12% | 6% |
| | Language Barriers/ English Learners | 34% | 47% | 15% | 4% |

Preventing Access. For English learners and immigrant families without access to home internet, affordability remains a significant concern. A notable 41% of survey respondents facing language barriers and lacking access to home internet pointed to the prohibitively high expense as the primary reason. This financial hurdle not only constrains them to engage in digital experiences but also hinders their access to a range of valuable online services. In focus group sessions, one participant voiced the pervasive sentiment, stating,

"We live in a world where we depend on the internet, and telecom companies take advantage of this. I have to pay \$75 a month for high-speed internet."

Language barriers compound the challenges of accessing the internet and essential technological services for this particular population. Despite the presence of resources and opportunities aimed at mitigating costs, many residents encounter difficulties in navigating the intricate systems and application processes. As one resident described,

"I applied...I am not sure it's complicated because you have to make an account and do many things to get it, and now I can't get it [ACP program]."

This underscores the need for solutions that not only address affordability but also simplify access processes for non-native English speakers to bridge the digital divide.

English-learner residents cited geographical location as another factor impacting access to the internet, and 35% cited no availability as the reason they could not get online. Since many of these residents live in remote or rural areas, their communities are less likely to have broadband infrastructure that supports access to the internet in cases where there is supporting infrastructure, they experience poor connectivity. One resident noted that "in our case, we live in an area that's very far away from the city, from the urban centers. Therefore, it's very hard to have access to the internet. We don't have access, at all." Other barriers include poor internet connectivity (22%) and the lack of a device to access the internet (12%). Six percent indicated that they did not know how to use the internet, and 4% indicated that they did not want the service.

What is preventing you from accessing internet in the home?

| | Internet is too expensive | Internet is not available | Internet is available but does not work well enough for my needs | Don't know how to use the internet | Don't want internet at my house | Don't have a digital device to connect to the internet |
|--|---------------------------|---------------------------|--|------------------------------------|---------------------------------|--|
| Overall | 36% | 35% | 23% | 9% | 9% | 9% |
| Language Barriers/ English Learners | 41% | 35% | 22% | 6% | 4% | 13% |

7. Individuals with Low Literacy

Access. The 2023 Digital Equity Survey found that 32% of individuals who have low levels of literacy did not subscribe to a home internet subscription. They were more likely than the average North Carolinian to rely on a monthly (22%) or prepaid (9%) mobile data plan, go elsewhere for internet (8%), pick up free Wi-Fi (10%), or borrow a hotspot (4%) when compared to the general population. **Of significance, individuals with low levels of literacy were more than five times (16%) as likely to indicate that they don't use the internet compared to the general population (3%).**

How do you and other members of your household primarily connect to the internet in your home? (Select all that apply)

| | Home Internet Subscription | Mobile Data Plan | Prepaid mobile data plan | Go Elsewhere for internet | Pick up Free Wi-Fifi | Borrow a hotspot | Don't use the internet |
|---------------------|----------------------------|------------------|--------------------------|---------------------------|----------------------|------------------|------------------------|
| Overall | 86% | 28% | 5% | 5% | 2% | 6% | 3% |
| Low Literacy | 68% | 22% | 10% | 9% | 4% | 8% | 16% |

Affordability. When asked about their monthly internet bill, less than one-quarter of individuals with low levels of literacy (24%) found their home internet affordable; only 30% found their mobile internet plan affordable. For many, their monthly home internet (25%) and mobile internet (15%) charges were too high, and they were more than twice as likely to indicate that they did not have one or more of these services (13-15%) when compared to the general population.

How affordable is your monthly internet bill? - Home Internet

| | | Affordable | Somewhat Affordable | Not Affordable | Don't have this service |
|---------------|---------------------|------------|---------------------|----------------|-------------------------|
| Home | Overall | 27% | 50% | 17% | 6% |
| | Low Literacy | 22% | 40% | 25% | 13% |
| Mobile | Overall | 34% | 47% | 12% | 6% |
| | Low Literacy | 30% | 40% | 15% | 15% |

Preventing Access. While affordability remains a significant concern among individuals with low levels of literacy (32% of individuals without home internet found the service was too expensive), however; the **second leading factor inhibiting individuals access to high speed internet is either not knowing how to use it (32%) or that they do not want it in their house (22%)** which is significantly higher than other covered populations or the general population (9%).

Low literacy exacerbates the difficulties associated with reaching the internet and necessary technological services for this specific demographic. Despite the availability of resources and initiatives designed to reduce expenses, numerous North Carolinians face challenges in navigating complex systems and application procedures due to their low literacy levels. This necessitates solutions that not only tackle affordability concerns but also streamline access processes for individuals with low literacy, aiming to narrow the digital divide.

What is preventing you from accessing internet in the home?

| | Internet is too expensive | Internet is not available | Internet is available but does not work well enough for my needs | Don't know how to use the internet | Don't want internet at my house | Don't have a digital device to connect to the internet |
|----------------|---------------------------|---------------------------|--|------------------------------------|---------------------------------|--|
| Overall | 36% | 35% | 23% | 9% | 9% | 9% |

| | | | | | | |
|---------------------|-----|-----|----|-----|-----|-----|
| Low Literacy | 32% | 21% | 6% | 32% | 22% | 16% |
|---------------------|-----|-----|----|-----|-----|-----|

8. Individuals who are members of a racial or ethnic minority group

Access. Racial and ethnic minority groups (including non-white or Hispanic) in North Carolina have lower rates of home internet subscriptions (83%) compared to the overall state population (86%). One listening session participant shared his struggles,

“If I have to use my internet downtown in my area, which is a predominantly black and brown community, I missed all kinds of work, so I was very frustrated.”

These individuals were more likely to access either monthly (31%) or prepaid (7%) mobile data plans, pick up free Wi-Fi (7%), or borrow a hotspot (3%). Four percent indicated that they do not use the internet at all.

How do you and other members of your household primarily connect to the internet in your home? (Select all that apply)

| | Home Internet Subscription | Mobile Data Plan | Prepaid mobile data plan | Go Elsewhere for internet | Pick up Free Wi-Fi | Borrow a hotspot | Don't use the internet |
|---------------------------------|----------------------------|------------------|--------------------------|---------------------------|--------------------|------------------|------------------------|
| Overall | 86% | 28% | 5% | 5% | 2% | 6% | 3% |
| Racial/ethnic minorities | 83% | 31% | 7% | 7% | 3% | 6% | 4% |

Affordability. Racial and ethnic minorities were less likely than the average North Carolinian to find their monthly home (24%) or mobile (31%) internet bill affordable and 3%-4% more likely to consider their service unaffordable. Listening session participants who identified as members of a racial or ethnic minority group shared stories of frustration with rapidly increasing monthly bills, poor customer service, discrepancies in pricing, and lack of choice when it comes to internet providers.

How affordable is your monthly internet bill? - Home Internet

| | | Affordable | Somewhat affordable | Not affordable | Don't have this service |
|---------------|---------------------------------|------------|---------------------|----------------|-------------------------|
| Home | Overall | 27% | 50% | 17% | 6% |
| | Racial/ethnic minorities | 24% | 47% | 21% | 7% |
| Mobile | Overall | 34% | 47% | 12% | 6% |
| | Racial/ethnic minorities | 31% | 47% | 15% | 6% |

Preventing Access. Racial and ethnic minorities without internet service in the home were more likely to cite cost (38%) and availability (30%) as the main inhibiting factors. They were also more likely than the general population to indicate they don't know how to use the internet (14%) or don't have a digital device to connect to the internet (13%).

What is preventing you from accessing internet in the home?

| | Internet is too expensive | Internet is not available | Internet is available but does not work well enough for my needs | Don't know how to use the internet | Don't want internet at my house | Don't have a digital device to connect to the internet |
|---------------------------------|---------------------------|---------------------------|--|------------------------------------|---------------------------------|--|
| Overall | 36% | 35% | 23% | 9% | 9% | 9% |
| Racial/ethnic minorities | 38% | 30% | 16% | 14% | 9% | 13% |

9. Rural Residents

Access. Based on our current assessment, North Carolina has 374,412 unserved broadband serviceable locations (totaling 409,445 units of both homes and businesses) and 127,956 underserved broadband serviceable locations (totaling 145,778 units of both homes and businesses). A common challenge residents face is the lack of reliable internet access where one participant said, "Reliable internet is a huge need in my rural area." The vast majority of these unserved and underserved locations are in rural areas, especially in more rural areas of the state where there is less competition among service providers. In listening sessions, we heard over and over again the need for broadband internet. Participants also mentioned the need for competition and better-quality internet. A resident in the listening sessions stated,

"We are very rural and only get 2 bars on our phones. We plug our phones into our laptops to access the internet. We had [internet service provider], which was very poor quality and expensive."

The absence of stable internet connection impacts their ability to work, access educational materials, and communicate with their community. Despite the importance of learning and having digital skills, it is a challenge for those in rural areas to utilize these skills without reliable internet connections (Lai & Widmar, 2021; Reynolds et al., 2022).

Results from the 2023 Digital Equity Survey show 85% of rural survey takers accessed the internet through a home subscription. The other most common way for rural residents to get online is through a mobile data plan (28%) or to go somewhere else to access the internet (7%). Only 3% indicated that they did not use the internet at all.

How do you and other members of your household primarily connect to the internet in your home? (Select all that apply)

| | Home Internet Subscription | Mobile Data Plan | Prepaid mobile data plan | Go Elsewhere for internet | Pick up Free Wi-Fi | Borrow a hotspot | Don't use the internet |
|------------------------|----------------------------|------------------|--------------------------|---------------------------|--------------------|------------------|------------------------|
| Overall | 86% | 28% | 5% | 5% | 2% | 6% | 3% |
| Rural Residents | 85% | 28% | 5% | 5% | 2% | 7% | 3% |

Affordability. Throughout the listening sessions, we heard the need for more affordable internet. Rural residents were slightly less likely to find their monthly home (25%) and mobile (33%) internet bills affordable when compared to the average North Carolina resident and were slightly more likely to find this service unaffordable (18% home, 13% mobile internet).

How affordable is your monthly internet bill? - Home Internet

| | | Affordable | Somewhat affordable | Not affordable | Don't have this service |
|---------------|------------------------|------------|---------------------|----------------|-------------------------|
| Home | Overall | 27% | 50% | 17% | 6% |
| | Rural Residents | 25% | 50% | 18% | 6% |
| Mobile | Overall | 34% | 47% | 12% | 6% |
| | Rural Residents | 33% | 49% | 13% | 6% |

Preventing Access. Stories from rural residents about paying more for the internet due to lack of competition and/or geography were common. Rural residents cited availability (39%) and cost (33%) as the main barriers to accessing the internet at home. For many residents, the internet simply isn't available at their residence. When service is available, the cost of service is often so exorbitant that individuals and families can't afford it. This is not only because rural residents have overall lower incomes than urban residents, but because they are often charged more and have fewer providers from which to choose.

With little to no competition for broadband providers, residents are forced to accept and pay monopoly prices and internet speeds without competition from competitors to improve pricing or quality. More provider options can bridge this gap; as one resident stated,

“As a single mother, I have to take my kids to school so they can do their homework over there. Because we don't have access to the internet here, it's very hard for us to have the internet to use a computer.” Public Wi-Fi is a potential solution to help neighborhoods and larger crowds in downtown areas.

Within rural communities with some internet access, the infrastructure and connectivity are widely based on how close a major business or house is to town. Those in rural communities without internet at home said that either internet service was not available (39%) or that it didn't work well enough to meet their needs (25%).

“If you live in this county, you have to drive up to 40 minutes so you can get internet access at a library or at a church.”

Based on internal analysis of FCC ACP data, rural residents often have the lowest percentages of eligible households enrolled in the ACP. A Cumberland County resident emphasized,

“If it were a time where me and my family needed to choose which bills to pay and leave one out, I would leave out electricity and pay for the internet bill because it is not a nice to have. It is a have-to-have [service].”

What is preventing you from accessing internet in the home?

| | Internet is too expensive | Internet is not available | Internet is available but does not work well enough for my needs | Don't know how to use the internet | Don't want internet at my house | Don't have a digital device to connect to the internet |
|------------------------|---------------------------|---------------------------|--|------------------------------------|---------------------------------|--|
| Overall | 36% | 35% | 23% | 9% | 9% | 9% |
| Rural Residents | 33% | 39% | 23% | 10% | 9% | 8% |

10. LGBTQA+ members

Access. The 2023 Digital Equity Survey found that only 8% of individuals who are members of the LGBTQA+ community did not subscribe to a home internet subscription. They were more likely than the average North Carolinian to rely on a monthly (31%) or prepaid (19%) mobile plans, go elsewhere for internet (10%), or pick up free Wi-Fi (6%). However, they were less likely to borrow a hotspot (1%) and only 1% of the LGBTQA+ members indicated that they do not use the internet.

How do you and other members of your household primarily connect to the internet in your home? (Select all that apply)

| | Home Internet Subscription | Mobile Data Plan | Prepaid mobile data plan | Go Elsewhere for internet | Pick up Free Wi-Fi | Borrow a hotspot | Don't use the internet |
|------------------------|----------------------------|------------------|--------------------------|---------------------------|--------------------|------------------|------------------------|
| Overall | 86% | 28% | 5% | 5% | 2% | 6% | 3% |
| LGBTQA+ members | 92% | 31% | 6% | 10% | 1% | 10% | 1% |

Affordability. LGBTQA+ members were less likely than the average North Carolinian to find their monthly internet bill affordable (25%) and they were more likely to consider their service unaffordable (20%). However, 38% of the LGBTQA+ members that took the Digital Equity Survey found their mobile internet service to be affordable and only 10% found it unaffordable. Ninety-five percent of individuals indicated that they subscribed to at least one of these services.

How affordable is your monthly internet bill? - Home Internet

| | | Affordable | Somewhat affordable | Not affordable | Don't have this service |
|--------|------------------|------------|---------------------|----------------|-------------------------|
| Home | Overall | 27% | 50% | 17% | 6% |
| | LGBTQ A+ members | 25% | 54% | 20% | 1% |
| Mobile | Overall | 34% | 47% | 12% | 6% |
| | LGBTQ A+ members | 38% | 47% | 10% | 5% |

Preventing Access. Members of the LGBTQA+ community without internet service indicated that, for most people, internet service was available and worked well enough to meet their needs. They were most likely to cite the availability (37%) and cost (37%) of the internet to be the greatest factors inhibiting their access to the internet at their home. None of the respondents without home internet said that they didn't know how to use the internet or have at least one device that could connect to the internet.

What is preventing you from accessing the internet in the home?

| | Internet is too expensive | Internet is not available | Internet is available but does not work well enough for my needs | Don't know how to use the internet | Don't want internet at my house | Don't have a digital device to connect to the internet |
|-----------------|---------------------------|---------------------------|--|------------------------------------|---------------------------------|--|
| Overall | 36% | 35% | 23% | 9% | 9% | 9% |
| LGBTQA+ members | 37% | 37% | 16% | 0% | 11% | 0% |