

Technology Access & Adoption Report



Why the research was conducted:

In November 2018, the King County Council passed a Proviso for addressing **the need for increasing broadband internet access to unserved and underserved areas** of the County.

With this, the King County Information Technology Department (KCIT) was tasked with conducting a Technology Access and Adoption Study across King County.

With the help of community partners, including King County Housing Authority (KCHA), King County **gathered data and insights not only on access and affordability of the internet, but on attitudes, literacy, usage, and prevalence of skills needed to achieve full digital engagement.**

Who was surveyed:

The King County survey was conducted between June 24th and August 30th, 2019 with a total of 3,868 surveys collected.

Residents were invited to participate through random selection of the general population, as well as through partnerships with community agencies that support vulnerable populations (e.g. those living in poverty, people of color, those who do not speak English as a first language, immigrants, refugees, etc.).

A total of **462 surveys** were collected from residents who receive assistance from KCHA (e.g. voucher holders) or currently live in a KCHA owned or supported building.



Types of KCHA Programs:

45% Public Housing
37% Project Based Assistance
18% Tenant Based Assistance



King County Council Districts

40% 1, 2, & 8 (Seattle & West KC)
37% 5 & 7 (South KC)
23% 3, 6, & 9 (East KC)

KCHA Key Findings

- Many KCHA beneficiaries struggle to be digitally engaged due to physical barriers, including not having any access or devices of their own, despite being able to qualify for local and national assistance programs.
- Additionally, a lack of digital skills prevent beneficiaries from full digital engagement, forcing this population to rely on others to access technology and the internet.
- Even those with access struggle with inadequate speeds (e.g. below the threshold established as adequate broadband access) despite the fact that they are paying, on average, \$108 per month for internet in their home.



Household Size

Average 2.2 People, with 43% 1-person households.



Children in HH

Only 34% with at least one child under 18 years old.



Household Income

Average \$18,500, with half (53%) below \$12,000.



Age

Average 59 years old, with 37% 65 years old or older.



Ethnicity

Half (49%) are non-white with Asian, African American, and Hispanic the most common.



Primary Language

Half (49%) primarily speak a language other than English.



Gender

Almost two-thirds (62%) are female.



Education

Most are HS grads or have some college (63%).



Medical Condition/Disability

Almost half (43%) of households interviewed have at least one member with an impairment that impacts digital access.

Internet / Device Access

One out of five have no way to access the internet in their home (19%).



	KCHA	Gen Pop
No Internet Access at Home	19%*	4%
Have Home Internet Access	81%**	96%
Fixed Broadband Subscription (net)	67%**	89%
Cellular data plan only	6%	4%
Any Free Internet Access (net)	4%	4%

Though KCHA residents spend less than the county at large, they are still spending a significant amount - \$108 per month – on access to the internet.

■ <\$50/mo ■ \$50-\$99 ■ \$100-\$149 ■ \$150+



* Sig higher/ ** Sig lower than the general population



Average \$108/mo.**

Significantly lower than the general population at \$182/mo. internet spend.



At a rate that is almost double that of King County in total, nearly half of KCHA residents either rely on internet connections that are not consistently adequate for their needs or do not have internet access at their home.



More than **2 in 5** find their internet connections and speeds to be inadequate

■ Completely/Mostly Adequate ■ Sometimes/Rarely/Not Adequate/No Internet



General population: Sometimes/Rarely/Not Adequate/No Internet – 23%



1.8** Average number of types of devices owned in the household (County average – 3.5)

KCHA residents have significantly fewer types of devices. These households are likely to own no internet capable devices at all or be limited to one type of device such as a smartphone (that may be shared among multiple family members).

■ 0 devices ■ 1 device ■ 2 devices ■ 3 devices ■ 4+ devices



* Sig higher/ ** Sig lower than the general population

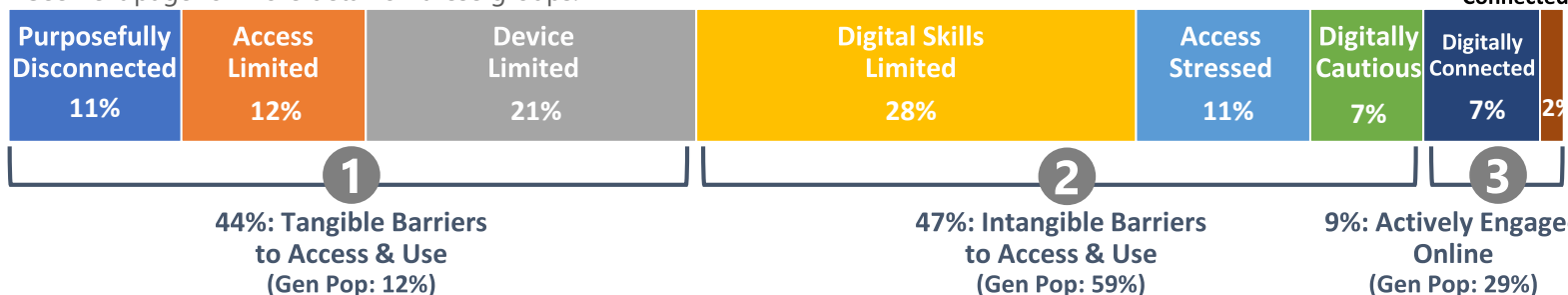
Digital Connectedness of Residents*

9 in 10 face barriers to access and use, including *tangible and intangible* barriers.

Many KCHA residents struggle with barriers to being fully digitally connected.

These barriers are a mix of tangible (e.g. lack of internet access, limited devices, etc.) or systemic (lack of skills or buying power and fear/perception based).

*See next page for more detail on these groups.



Internet Concerns & Desired Internet Service Improvements



- 54%**** • Security of personal information
- 52%**** • Protection from viruses/malware
- 47%**** • How data is being used
- 35%** • Protecting themselves from others
- 30%** • Protecting their children from others



* Sig higher/ ** Sig lower than the general population

KCHA residents want a **lower cost** for internet service. And they also desire **better service** from the ISPs.



1

37%
Better
service

2

29%**
Lower
price



Devices and Connectedness

KCHA residents are significantly less likely to have a range of devices in the household.

Devices in Household	KCHA	Gen Pop
Have a device in household (any)	89%**	99%
Have a smartphone/mobile device	65**	91%
Have a laptop	47**	81%
Have a tablet	33**	68%
Have a desktop computer	31**	54%
Gaming console	18**	35%
Voice-activated device	7**	28%

They are most likely to rely on smartphones to access the internet and are significantly less likely to use laptops.

Primary Device to Access Internet	KCHA	Gen Pop
Smartphone	46%	46%
Laptop	17%**	28%
Desktop PC	16%	16%

* Sig higher/ ** Sig lower than the general population

Reliance on Others

2-in-5 (40%) KCHA residents rely on others to access or navigate the internet to some degree. This rate is significantly greater than the general population.

- Rely great deal on others
- Rely somewhat on others
- Do not or rarely rely on others



* Sig higher/ ** Sig lower than the general population

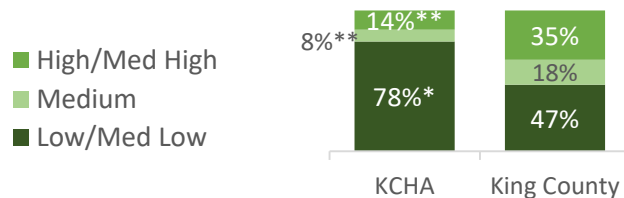
Low Cost Internet Programs

Despite being able to qualify and benefit from low-income internet programs, many KCHA residents are unaware of these programs. Comcast Internet Essentials is the most used; however, 3 in 5 residents do not use this service (presumably all would qualify).

Know of or use low-cost internet service	Use	Aware	Not Aware
Comcast Internet Essentials: \$9.95 month internet	38%	63%	37%
Lifeline Phone Discount: Provides smartphone service discounts	10%	35%	65%
Century Link Internet Basics: \$10 to \$15 per month	4%	29%	71%
Simply Internet by Wave: \$9.95 month internet	2%	23%	77%
Mobile Citizen / InterConnection: \$120 per year internet	2%	22%	78%

Online Activity Levels

KCHA residents have a significantly lower level of online activity level (when compared to the county population at large).



* Sig higher/ ** Sig lower than the general population

Digital Connectedness Descriptions

Purposefully Disconnected	Access Limited	Device Limited	Literacy/Skills Limited	Access Stressed	Digitally Wary	Digitally Connected	Hyper Connected
Lack internet at home because they don't want/need it, or distrust it, or don't believe it is important.	Believe internet is important but do not have access or limited access where they live.	Have access to internet in home, but use borrowed devices or only own one or less types of devices in the home.	Lack technology skills to access and use the internet independently and confidently.	Have access and tech. skills, but frustrated by the cost and speed of their connection, as well as service from providers.	Tech. savvy and adept, but worry about privacy and data security and distrust internet companies.	Have access and skills. Have many types of devices and appropriate connections to reliably use the internet.	Have the fastest connections, unlimited data plans, and use a variety of devices in their daily lives.