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UTAH BROADBAND NONADOPTERS

FINAL REPORT | AUGUST 2014

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UTAH BROADBAND NONADOPTERS

THE STATE OF UTAH
BROADBAND PROJECT
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Final Report
August 2014

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EXECUTIVE SUMMARY

As researchers at Utah State University and Southern Utah University, we were asked to conduct a survey of broadband nonadopters in the State of Utah to better understand what the typical nonadopter of high-speed Internet looks like. In order to make meaningful comparisons across the state and to provide more local information to Utah's seven Association of Governments (AOG) areas engaged in planning and scoping for broadband Internet, we interviewed 500 respondents from January 10-19, 2014.

Our initial assumption was that the average nonadopter would be older, have less education, a lower household income and deviate from the average or typical Utahn in significant ways. In what follows we provide a proto-typical nonadopter, which confirms some of these assumptions and not others. As with our 2011 survey[1], we find that broadband adoption rates are high among Utahns. We also find that those who do not adopt may be doing so for reasons that you might not expect.

Funding for this study was provided by the Utah Broadband Project, which is a joint effort between the Governor's Office of Economic Development, the Public Service Commission and the Department of Technology Services' Automated Geographic Reference Center, which is funded through the National Telecommunications and Information Administration (NTIA).

Survey Methodology

Our core goal in conducting this survey was to explore who broadband nonadopters are, their reasons for nonadoption and what, if anything, could impact their decision to adopt. From these core goals we designed a questionnaire to be administered to a random sample of Utahns to better explain these questions. As with our 2011 study, the survey is to provide greater insight to policymakers, broadband providers and the interested public policy community about the reasons for nonadoption and their implications for how adoption might be increased.

Increasing broadband uptake from a public policy perspective will vary greatly depending on which impediment is primarily active. If the primary impediment is lack of service availability, one policy option is to provide incentives for the expansion of the technological infrastructure necessary to increase uptake to a market, which

is primed for purchase if the service is available. If the impediment is cost, however, the preferences of individuals may not align with the desire to increase broadband uptake and thus only by underpricing broadband service will significant expansion be possible. Further if a simple lack of interest is active, little may be possible from a public policy perspective to increase the rates of adoption beyond education and marketing programs.

To test these various possibilities, we surveyed 500 Utah residents who reported that they did not currently have broadband in their homes about their actual Internet use, the availability of high-speed Internet in their community, their willingness to pay for broadband service, their perceptions of the Internet service market and what might increase their likelihood to purchase in that market. Through this survey we sought to create a prototypical nonadopter for the State of Utah, and for each of the AOGs engaged in broadband planning.

To achieve these goals, we conducted a public opinion survey by telephone of 500 Utahns resulting in over 27,000 total calls made. Among this sample, 40 percent were contacted using mobile phone numbers and 60 percent were contacted by traditional landline. The telephone survey was conducted from January 10-19, 2014 with an incident rate for nonadoption of 23 percent and an overall response rate of eight percent. Completion of the full survey took on average 14 minutes. Because we were largely interested in understanding the distribution of nonadopters as well as their location, this survey unlike the earlier iteration, was not designed to oversample rural areas. Further, because we were not primarily interested in ensuring that each region of the state was represented and had data sufficient to evaluate the preferences of survey respondents, our sampling methodology returned fewer respondents for some regions than would be necessary to have margins of error below 10 percent.[2] Because of this, results from all 500 respondents are of substantially more value than the comparison between of the regions we surveyed.[3]

Regional Definitions

Given the regional planning nature, and the fact that different areas of the state are also likely to face substantially different barriers to broadband Internet uptake, we identified seven regions across the state based on the Utah's AOG regions. These multi-county AOGs have been tasked with broadband planning across the State of Utah, and so have an interest in understanding the key reasons for nonadoption

across the state. Our logic in using this approach is premised on the idea that these AOGS are formed precisely because the counties which choose to band together share common geography, demographics, economics, culture, policy concerns and problems, and have been tasked to address these issues together.

REGIONS OF UTAH

Bear River Association of Governments Region

The Bear River Association of Governments (BRAG) region is located across the northernmost portion of the state and includes Cache, Box Elder and Rich Counties and has an estimated population of 164,895.[4] The majority of the population in this region resides in the population centers of Cache and Box Elder Counties with large surrounding rural areas.

Wasatch Front Regional Council

The Wasatch Front region, which includes Weber, Morgan, Davis, Tooele and Salt Lake Counties is the most highly populated area of the state, with an estimated population of 1,635,054.[5] The bulk of the population of this region is concentrated along the Western foothills of the Wasatch Mountain Range and along the I-15

corridor from Ogden to southern Salt Lake County. This region shares a largely urban and suburban character and a dominant position in the population of the state. Areas of Morgan and Tooele counties demonstrate a decidedly more suburban and somewhat rural character but are increasingly tied to the economic, social and cultural realities of nearby urbanized areas.

Mountainland Association of Governments Region

The Mountainland Association of Governments (MAG) region includes Summit, Wasatch and Utah Counties and has a population of approximately 576,418.[6] The MAG region, which includes the resort towns of Heber and Park City, along with the Wasatch front communities from American Fork to Provo, is an interesting contrast in political, cultural and economic demographics. This region is dominated by the urban and suburban communities located in Utah County, with the bulk of the region's population residing along the Southern I-15 corridor that transects Utah County from north to south.

Uintah Basin Association of Governments Region

The Uintah Basin Association of Governments (UBAOG) region, which includes Duchesne, Daggett and Uintah Counties includes the smallest population of the regions included in this report, with an estimated population of 52,254. The Uintah Basin, which is nestled among the Uintah Mountains is often known as the 'Basin.' The region has been home to substantial oil and gas development in recent years, the effects of which can be readily identified in the local communities especially in the somewhat varying nature of the population. The Uintah Basin also has a substantial Native American population and is home to large portions of the Uintah and Ouray Indian Reservation.

Six County Association of Governments Region

The Six County Association of Governments region includes Juab, Millard, Piute, Sanpete, Sevier and Wayne Counties, which includes most of central Utah, with a combined estimated population of 75,707.[7] Communities in the Six County region have a rural character with substantial resource extraction, farming, ranching and other agricultural production activities being the primary economic activities of the

region. Small rural communities typify the region with population centers such as Richfield, Ephraim and Manti serving as regional centers for access to services.

Five County Association of Governments Region

The Five County Association of Governments region is located in the southwest corner of the state and includes Beaver, Iron, Garfield, Washington and Kane Counties with a combined estimated population of 203,204.[8] This region is dominated by public lands issues, with the bulk of the population located in and around the Iron and Washington County areas. St. George and Cedar City are the largest municipalities in the region and have traditionally been the region's dominate areas. However, increased growth in the more rural areas has substantially increased the visibility and influence of those areas.

Southeastern Utah Association of Local Governments Region

The Southeastern Utah Association of Local Governments (SEUALG) region includes Carbon, Emery, Grand and San Juan Counties, with a combined estimated population of 56,350.[9] This region covers the southeastern area of Utah. The region in general, and the Four Corners area in particular, has limited transportation options and a significantly isolated population. The SEUALG region is dominated by large-scale public land ownership, and relies primarily on extractive and agricultural industries for the bulk of the region's economic activities. The region is also home to a substantial Native American Population that has a significant influence on the region's culture, history and orientation.

Sample Selection

Because we were interested in selecting a random sample, this by its very nature limited participation from the bulk of regions. The major population centers of the Wasatch Front, Utah County and to a lesser extent Cache and Washington Counties, dominate the sample as they do the larger population.

Despite this reality, our approach returned respondents from every county except Rich Country. This provides a full picture of the circumstances facing consumers across the state. However, because the sample is stratified in this way, the aggregate

numbers should not be interpreted as fully representative of the state as a whole, but rather are the weighted average of the regional responses.

To identify our relatively complex sample, we contracted with Survey Sampling International (SSI), an established survey and market research company, to conduct the actual sampling and telephone survey. Using their in-house survey lists, they generated a survey sample for state of Utah and conducted direct dial of both landline and cell phone numbers to meet the identified quota for each region.

For each of the completed surveys, 12.5 surveys were refused or incomplete yielding a response rate of eight percent. From January 10-19, 2014, SSI's surveyors conducted live phone interviews across the state. For information about the response rate and procedures please contact this study's authors.

Survey Instrument

The survey consisted of 38 multi-dimension questions, which were focused on the respondent's perceptions of the availability, affordability and desirability of broadband Internet service, as well as their demographic characteristics. All questions were directed specifically at the respondent's perception of the answer, rather than reaching some objective measure that was demonstrably correct. In developing the questionnaire, we wanted to ensure that the key hypotheses of the literature could be addressed, and that there was not some exogenous factor related to demography, geography, or other individual characteristic that was dominate in the decision to use Internet in home. Thus our questions focused on four areas.

The first area of questions probed the respondents' demographic profile and included items such as race, employment status, income, education and age, etc. The second set of questions sought to explore the respondents' reason for nonadoption. The third area of questions asked respondents about their use and expertise with the Internet in general. The fourth set questions asked respondents to identify price and preferences about Internet service as well as what, if anything, might encourage their adoption. These questions included the importance of Internet service to they or their family, willingness to pay and desire for faster Internet service.[10]

The following report begins with a section on understanding nonadoption. This section outlines the theory for our analysis including the four main reasons we find

for nonadoption: (1) price, (2) availability, (3) knowledge and expertise and (4) demand and preference. The next section gives the survey responses for the State of Utah, so that they can be compared to the regional information that follows. The following sections provide analysis for each of the seven AOG regions, including both demographic information and key reasons for nonadoption. Each region includes one pagers summarizing results for nonadoption, a more detailed analysis section and finally the survey results for that region.

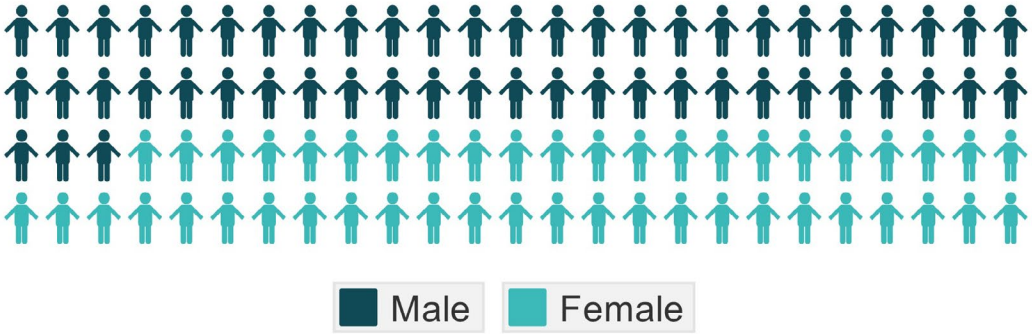
NOTES

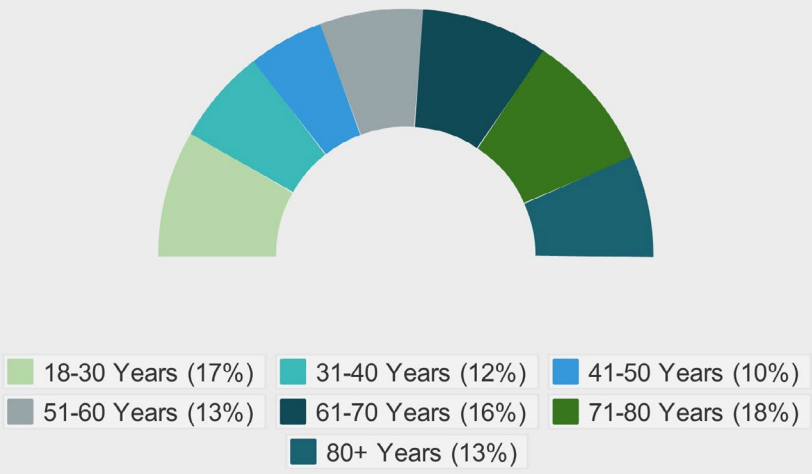
UTAH BROADBAND NON ADOPTERS

DEMOGRAPHICS

GENDER

Male 262 52%
Female 238 48%

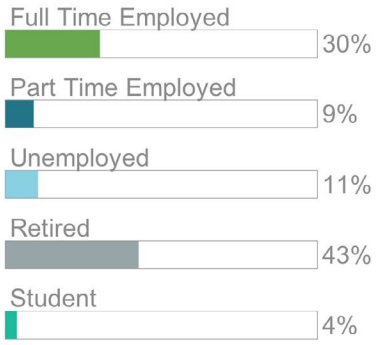




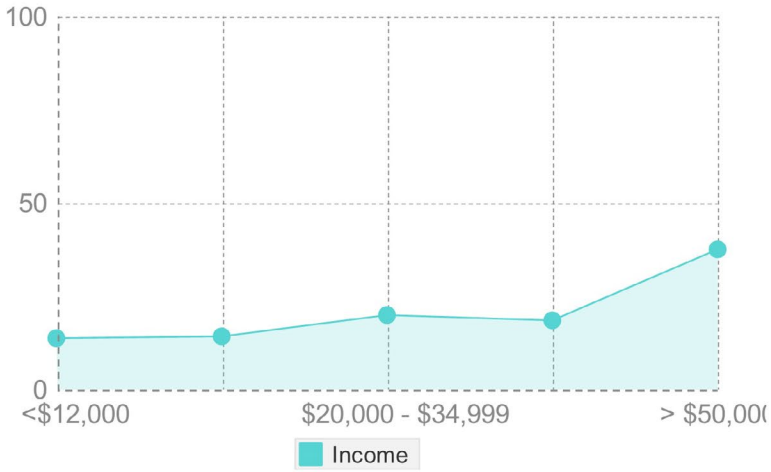
AGE

18-30 Years	82.5
31-40 Years	62
41-50 Years	49.25
51-60 Years	67.45
61-70 Years	82.45
71-80 Years	89.9
80+ Years	66.4

EMPLOYMENT STATUS

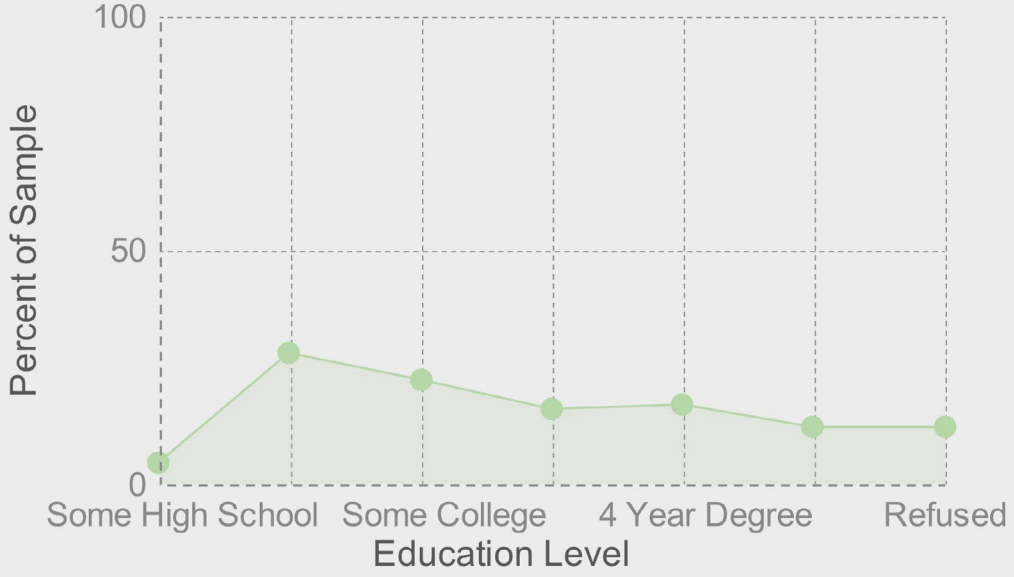


INCOME



EDUCATION

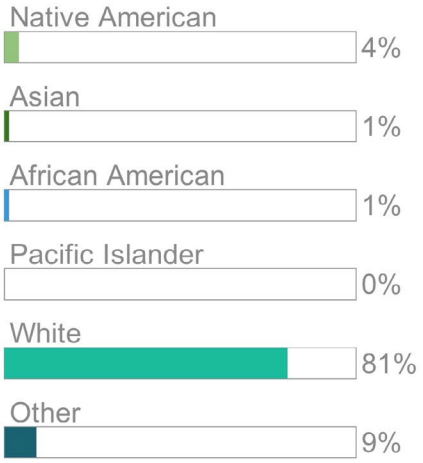
Some High School	4.2%
High School/GED	28.0%
Some College	22.0%
2 Year Tech Degree	15.8%
4 Year Degree	16.8%
Post Graduate	12.2%
Refused	12.2%



MARITAL STATUS

Divorced (12%)
Never Married (20%)
Domestic Partnership (1%)
Widowed (18%)
Married (49%)

RACE

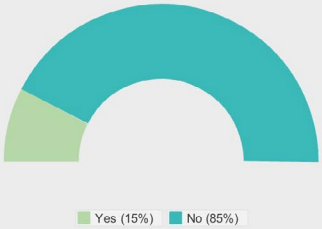


REASONS FOR NON ADOPTION

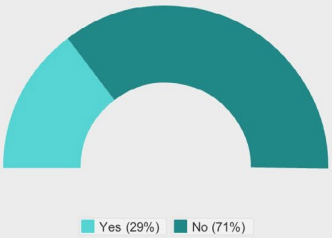
Don't Need/Not Interested (44%)
Too Expensive (22%)
Available Elsewhere (7%)
Not Available in My Area (12%)
Computer is Inadequate (8%)
Other (7%)

REASONS TO NOT HAVE HIGH-SPEED INTERNET AT HOME

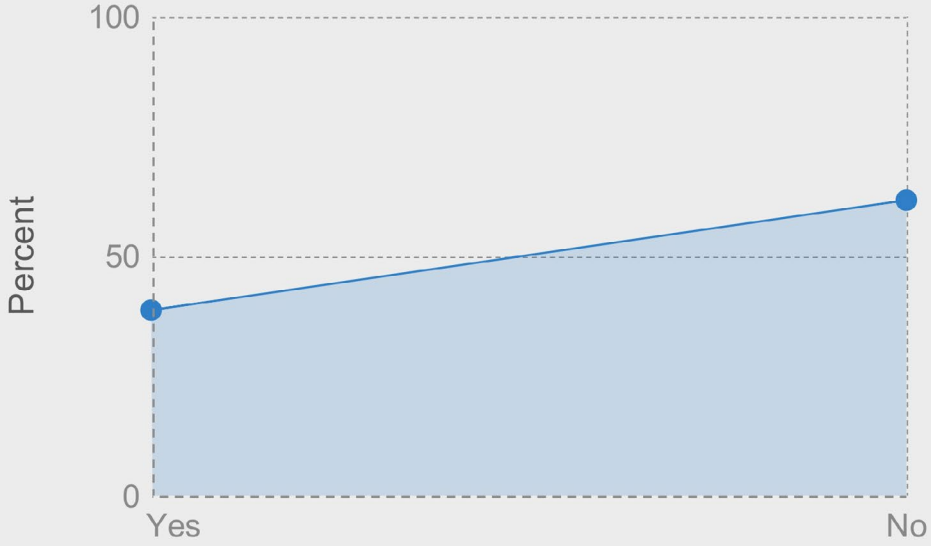
Don't Need it/Not Interested	44.0%
Too Expensive	22.0%
Can Use it Elsewhere	7.4%
Not Available in My Area	11.8%
Computer is Inadequate	7.8%
Other	7.0%



DO YOU KNOW HOW MANY PROVIDERS ARE AVAILABLE IN YOUR AREA?



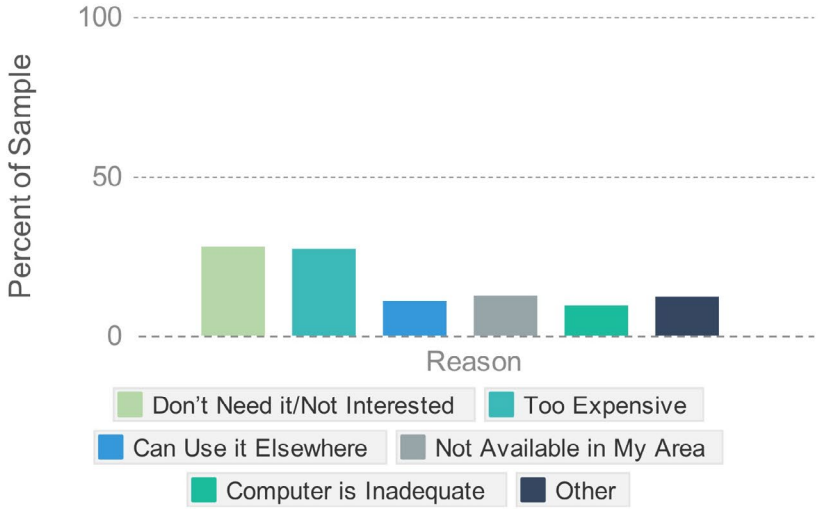
HAVE YOU HAD A HIGH SPEED CONNECTION IN THE PAST 5 YEARS?



DO YOU HAVE ANY INTEREST IN A FASTER CONNECTION?

MAIN REASON FOR CANCELING HIGH SPEED INTERNET ACCESS AT HOME

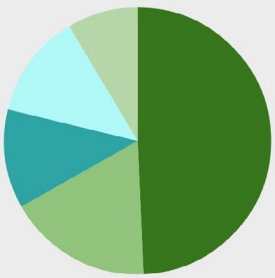
Don't Need it/Not Interested	27.9%
Too Expensive	27.2%
Can Use it Elsewhere	10.9%
Not Available in My Area	12.5%
Computer is Inadequate	9.5%
Other	12.2%



WHAT PEOPLE BELIEVE HIGH-SPEED INTERNET COSTS PER MONTH

< $25.00 (19%)
$26.00-$35.00 (13%)
$36.00-$45.00 (16%)
$46.00-$55.00 (19%)
$56.00-$65.00 (8%)
$66.00-$90.00 (11%)
>$90.00 (14%)

WHAT PEOPLE BELIEVE IT SHOULD COST PER MONTH



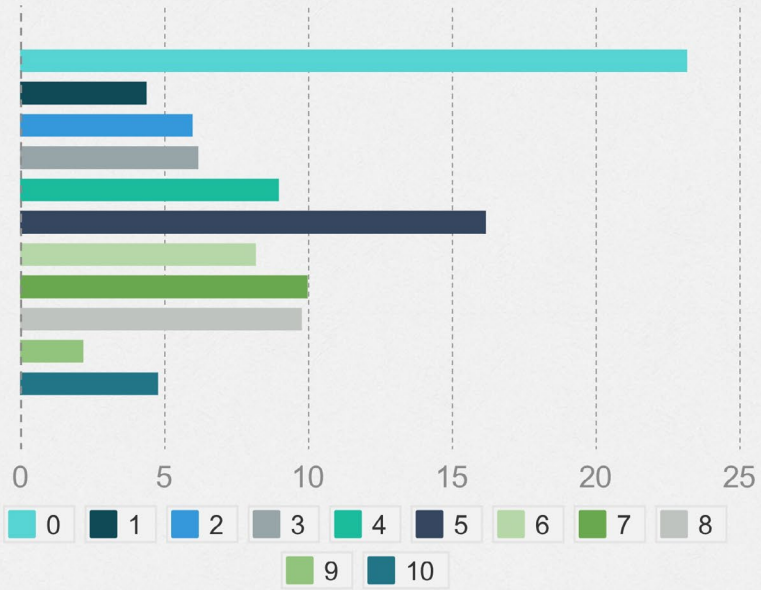
< $25 (49%)
$26 - $30 (18%)
$31- $40 (12%)
$41 - $50 (13%)
> $50 (9%)

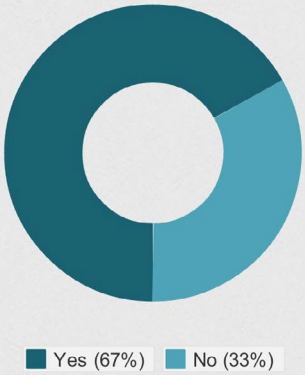
EXPERTISE & USE

Participants were asked to use a scale from zero to 10 to describe their computer skills.

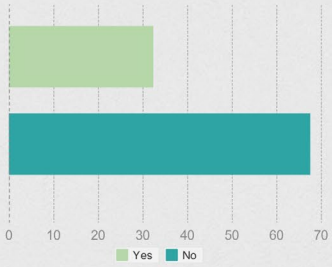
Zero being I have no computer skills

10 being I am very highly skilled.

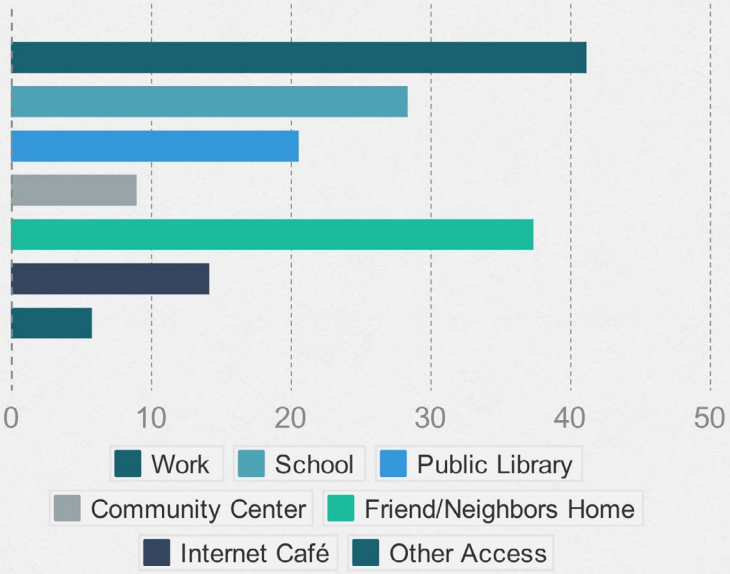




HOW MANY PARTICIPANTS HAVE COMPUTER EQUIPMENT IN THEIR HOME

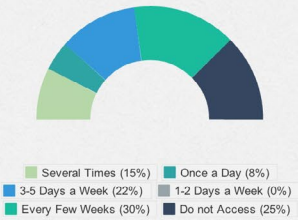


PARTICIPANTS WHO HAVE PARTICIPATED IN A CLASS, SEMINAR OR OTHER PROGRAM TO IMPROVE THEIR COMPUTER OR INTERNET SKILLS



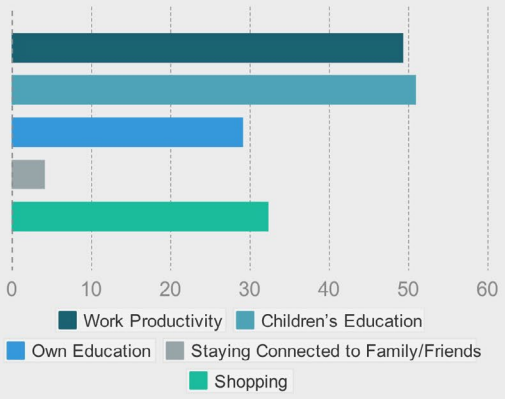
WHERE PARTICIPANTS ACCESS THE INTERNET OUTSIDE THE HOME

PARTICIPANTS WITH A CELL PHONE DATA PLAN

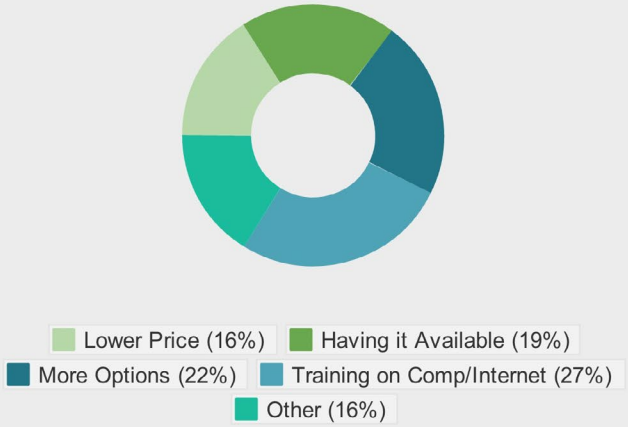


INTERNET USE FREQUENCY

BENEFITS AND CHANGE TO CURRENT PREFERENCE



BENEFITS PARTICIPANTS SAW TO HAVING HIGH SPEED INTERNET ACCESS IN THE HOME



WHAT WOULD MAKE PARTICIPANTS MORE LIKELY TO HAVE HIGH SPEED INTERNET ACCESS IN THEIR HOME

NOTES

BEAR RIVER ASSOCIATION OF GOVERNMENTS REGION

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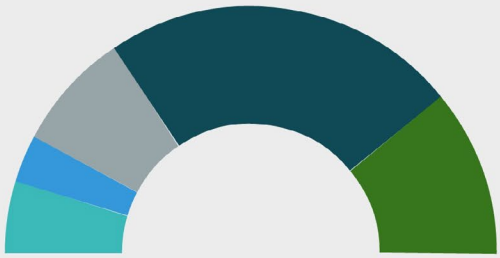
UTAH BROADBAND NONADOPTERS

The Bear River Association of Governments (BRAG) region is located across the northernmost portion of the state and includes Cache, Box Elder and Rich Counties and has an estimated population of 164,895.

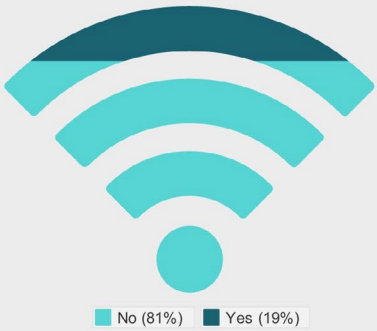
NONADOPTERS OF BROADBAND IN THE BEAR RIVER REGION ACCESS THE INTERNET INFREQUENTLY



- Several Times Each Day (0%)
- Once a Day (9%)
- 3-5 Days a Week (6%)
- 1-2 Days a Week (16%)
- Every Few Weeks (47%)
- Do Not Access (22%)

Among the region's nonadopters, gender, marital status, race and education statistics mirror the state average. The region's nonadopters were slightly younger than the state average, with an average age of 50.7 years. Respondents in the region also had lower total household incomes.

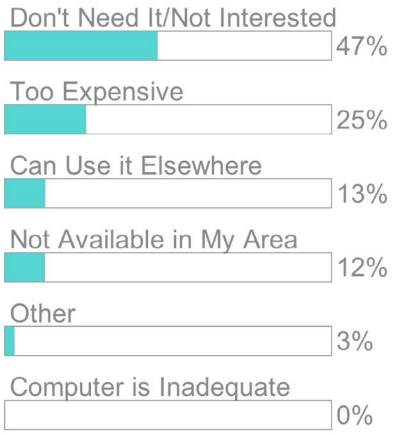
DO YOU KNOW HOW MANY ISP'S ARE IN YOUR AREA?



A majority of respondents did not know how many providers were available though 100 percent have computer equipment in their household. Actual broadband coverage in the region is generally good, although Rich County lags behind for download speeds of at least 25 Mbps.

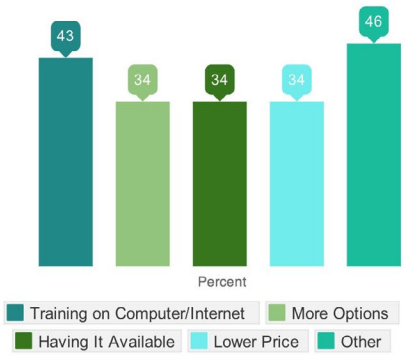
LACK OF INTEREST OR NEED

The key reason for nonadoption of broadband in the region is a lack of interest or need. In the BRAG region, almost half of respondents said they did not need high-speed Internet or were not interested in getting access in their homes.



KNOWLEDGE AND EXPERTISE

Respondents were asked to rate their computer skills on a scale of zero to 10, with zero being no computer skills and 10 being very highly skilled. In the BRAG region, 25 percent of respondents ranked their computer skills at a zero. Many respondents said training would make them more likely to have broadband at home.

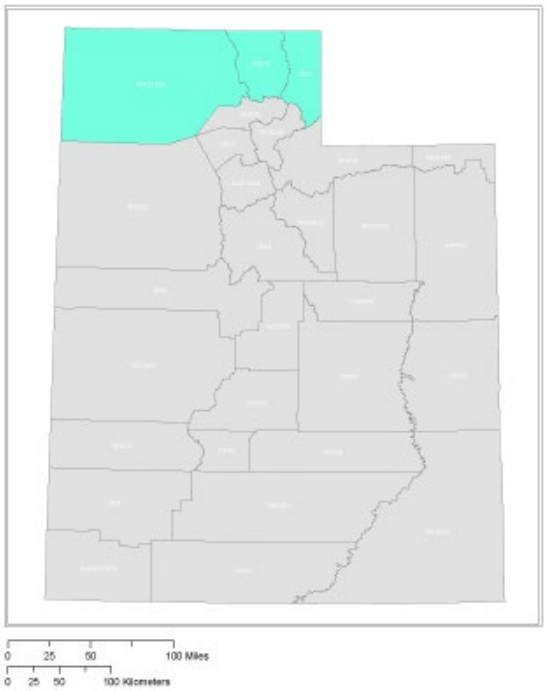


What would make you more likely to have high-speed Internet access in your home?

BEAR RIVER ASSOCIATION OF GOVERNMENTS REGION

The Bear River Association of Governments (BRAG) region is located across the northernmost portion of the state and includes Cache, Box Elder and Rich Counties and has an estimated population of 164,895.[5] The majority of the population in this region resides in the population centers of Cache and Box Elder Counties with large surrounding rural areas.

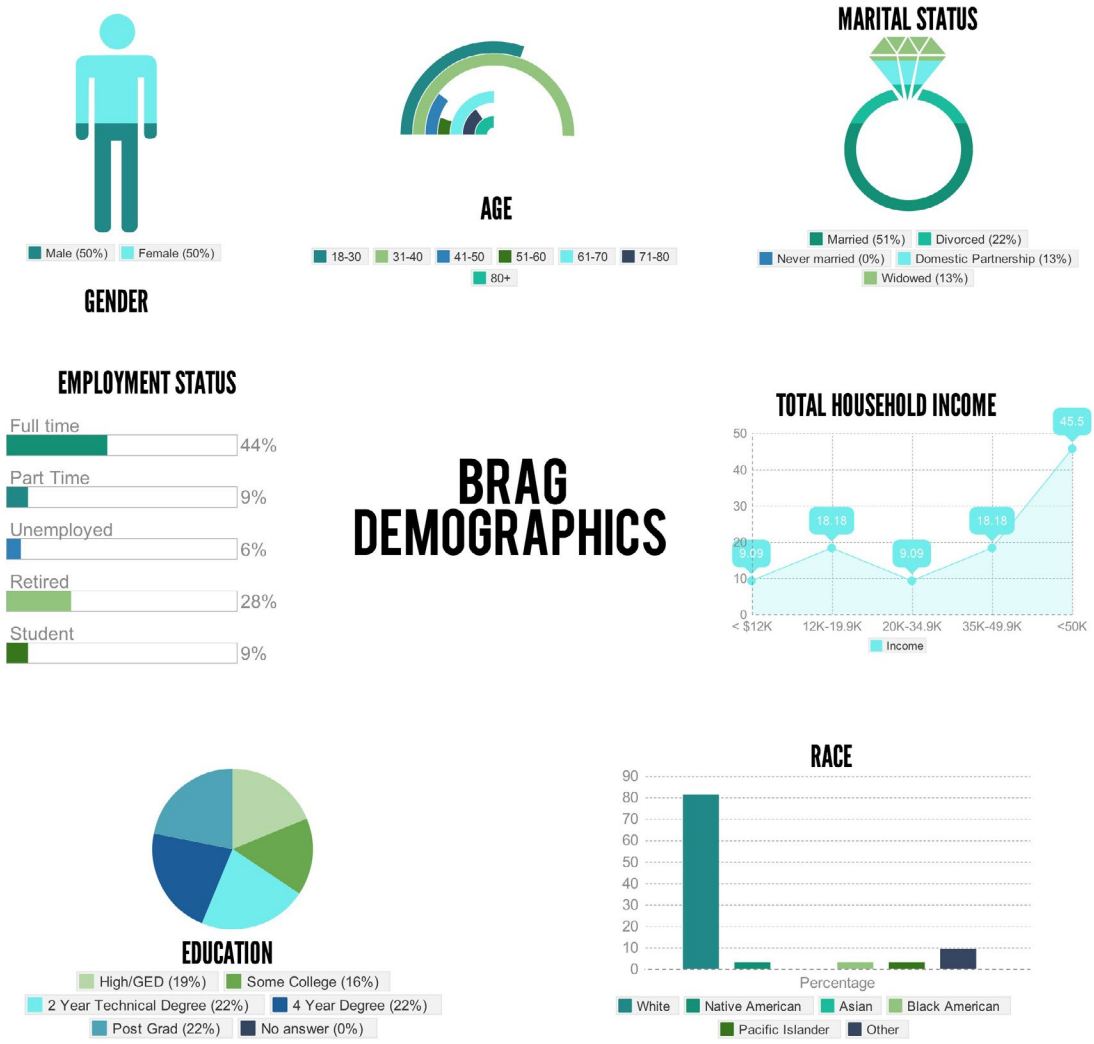
BEAR RIVER ASSOCIATION OF GOVERNMENTS REGION



Demographic Picture

The BRAG region's demographics did not markedly deviate from the state average. Males made up a slightly lower percentage of the population (50.0 percent) than the state as a whole (52.4 percent). The mean age for the region's respondents was 50.7 years, lower than the state average of 56.2 years. Both the region and the state as a whole saw a wide distribution of respondents' ages. The area had a lower percentage of respondents with household members between 46 and 60 years old. Throughout

the BRAG region, the percentage of respondents who were married was 46.9 percent, slightly lower, but similar to the state figure of 48.0 percent.



Total household income for respondents in the BRAG region was lower than the state average. In the region, mean total household income was $45,909 compared to the state's mean of $51,347. Although the average income is lower in the BRAG region, the standard deviation for this region's income is also lower, meaning that respondents' income is less varied here than the state as a whole. Most nonadopters

were employed as opposed to retired, and this may be a function of the small sample size for the region.

Racially, the BRAG region, like the state as a whole, is predominantly white. Education statistics are also similar between the region and the state. The nonadopters in BRAG region, however, tend to be more educated with a three-way tie of 21.9 percent of respondents having a two- year degree, a four-year degree, or post graduate education. The next largest group was those who completed high school or obtained a GED at 18.8 percent while 28 percent of the state's nonadopters had similar educational attainments. Of respondents in the region, 15.6 percent had some college compared to the state average of 22 percent.

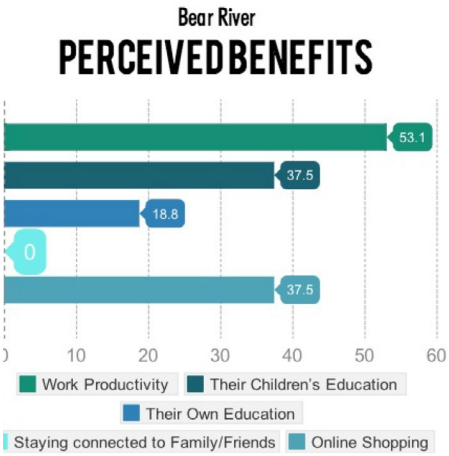
Low Internet Access Rates Among Nonadopters

Respondents were asked how often they access the Internet, with 21.9 percent of respondents in the BRAG region saying they never access the Internet. Another 46.9 percent said they access the Internet every few weeks, 15.6 percent access it one to two days per week and 6.25 percent said they access it three to five days a week. Just over nine percent of respondents access the Internet once a day. None of the region's respondents said they access the Internet several times per day. Similarly, most respondents in the region do not pay for a data plan on their cell phone. Clearly, the frequency of Internet access among nonadopters is low, although it is not clear whether that is due to lack of interest or desire to access the Internet, limited computer skills, the high cost of Internet access or limited access to technology. All of these are likely playing a role, although probably not with equal influence. We examine the role each of these reasons below.

Reasons for Nonadoption: Lack of Interest or Need

The key reason found for nonadoption at both the state level and in the BRAG region was a lack of interest or need. Although other factors are also contributing to nonadoption, this was found to be the strongest influence. In the BRAG region,

almost half of respondents said they did not need high-speed Internet or were not interested in getting it. That number was similar, although slightly lower, for the state as a whole, at 44 percent.



Respondents were also asked if they are interested in obtaining a faster connection, and lack of interest was expressed once again. In the BRAG region, 65.6 percent of respondents were not interested in having a faster high-speed connection now or in the future. At the state level, that number was slightly lower but still over 60 percent. This means well over half of respondents both at the regional and state level are not interested in obtaining high-speed Internet.

Finally, respondents were asked what would make them more likely to have high-speed Internet access in their homes. More than 40 percent of respondents in the area said that training on the computer or Internet would make them more likely to get high-speed Internet access. A larger percentage (46.9), however, said other factors would make them more likely to subscribe to high-speed Internet access without specifying exactly what such factors were.

This suggests that the lack of interest in high-speed Internet may be related to the low level of computer and Internet skills among nonadopters. When asked what would make them more likely to adopt high-speed Internet, there was a three-way tie, at 34.4 percent, between having more options, having it available and a being charged a lower price.

With these results, little can be done to increase adoption rates for broadband if lack of interest is the root of the problem. Interestingly, despite the low level of interest, nonadopters in the region said they would see benefits from access to high-speed home Internet service in terms of work productivity (53.1 percent), their children's education (37.5 percent), their own education (18.8 percent), staying connected to family/friends (zero percent) and shopping (37.5 percent). These benefits however,

have not translated into obtaining access to high-speed Internet. Because increasing demand is difficult, we turn to other reasons for nonadoption that policymakers may be able to more effectively address.

Reasons for Nonadoption: Knowledge and Expertise

When respondents were asked about their computer use and expertise, results found evidence that a lack of expertise about computers in general, and the Internet specifically, is likely playing a key role in nonadoption both in the BRAG region and in the state.

Respondents were asked to rate their computer skills on a scale of zero to 10, with zero being no computer skills and 10 being very highly skilled. Despite all respondents having computer equipment in the home, in the BRAG region, 25 percent of respondents ranked their computer skills at zero. Of the region's respondents, 53.1 percent ranked their computer skills at a five or lower. Likewise, most respondents have not participated in a class, seminar or other program to improve their computer or Internet skills. This means well over half of respondents in the region are not highly skilled at using a computer. This lack of skills is probably contributing to nonadoption of high-speed Internet in the BRAG region.

When respondents in the BRAG region were asked what would make them more likely to have high-speed Internet access in their homes, 43.75 percent answered training on computer and Internet use. Thus, providing training and educational programs geared toward increasing computer literacy and Internet skills may be one of the most effective ways to increase adoption rates for broadband.

Reasons for Nonadoption: Price

Another key reason cited for nonadoption at both the state and regional level is that high-speed Internet services are too expensive. One-fourth of respondents

in the BRAG region, and more than one-fifth at the state level said that the high cost of broadband is the main reason for nonadoption.

Respondents were asked what a reasonable monthly cost for high-speed Internet would be and their responses were widely distributed: 5.3 percent of respondents in the BRAG region, and 8.56 percent of those at the state level answered over $50 per month. Almost half of respondents at the state level said high-speed Internet should cost less than $25 per month. In the BRAG region only 36.9 percent believed high-speed Internet should cost less than $25 per month and 26.3 percent answered that $26-$30 would be reasonable.

Contrasted with what respondents believe to be a reasonable rate, the perception of what high-speed Internet costs differs widely. Of respondents in the region, 6.25 percent versus 19.3 percent statewide believe that high-speed Internet service costs less than $25 per month. The majority of respondents in the BRAG region (31.25 percent) believe such services cost between $26-$35, compared to only 12.6 percent statewide. Those who said high-speed Internet costs between $36 and $45 per month made up 12.5 percent of respondents in the region and 16.3 statewide. The region's next largest group (25 percent) believes high-speed Internet providers charge between $46 and $55 per month. There was a two-way tie in the BRAG region, at 6.25 percent, between $56-$65 and $66-$90, while 12.5 percent believe the cost of monthly Internet service to be greater than $90. This compares to eight percent ($56 - $65 per month), 10.9 percent ($66 - $90 per month) and 14.23 percent (over $90 per month) in the state. Compared with what respondents believe high-speed Internet should cost, this indicates most people in the region believe high-speed Internet costs more than it should.

Just over 34 percent of respondents in the BRAG region said that if high-speed Internet were to cost less, they would be more likely to get access in their homes. Reducing the cost of high-speed Internet services may be necessary to increase adoption rates. Although it would not be recommended, subsidizing either the

supply or the demand side of the high-speed Internet market may be one way to achieve this.

Reasons for Nonadoption: Not Available

Another reason found for nonadoption is the technology necessary to access high-speed Internet may not be available. But lack of equipment cannot be the main reason for nonadoption in the region because 100 percent of respondents in the BRAG region have computer equipment in their home.

In the BRAG region, 68.8 percent of respondents affirmed that high-speed Internet access was available in their area while 31.3 percent said it was not. Of the reasons for nonadoption, only 12.4 percent said that non-availability was the reason for not having high-speed Internet access in their home. But 81.2 percent of respondents in the region did not know how many providers there were in their area. Both figures are similar to the statewide numbers. Thus, uncertainty and lack of information about Internet services in their area contribute to confusion about availability.

Despite the lack of knowledge on the part of nonadopters, data for broadband availability show that coverage is generally good in the region, at least for download speeds over 10 Mbps. Cache County provides coverage to 92 percent of households at download speeds of at least 25 Mbps, while Box Elder is close behind at about 83 percent of households. Rich County has coverage for 99 percent of homes at download speeds of 10 Mbps, but for speeds of 25 Mbps, that coverage drops to 16 percent, well below the state average of just over 92 percent. This analysis did not evaluate specific upload speeds by county, which was done in order to facilitate an enhanced evaluation of download speeds by county.

Policymakers could help solve the lack of knowledge by educating people about the high-speed Internet options available in their area. This could take the form of community outreach such as educational mailers of the various Internet options available in the area. In Rich County, policymakers could also consider incentives to extend higher speed coverage to more households and could then attempt to educate citizens about broadband availability in the area.

WASATCH FRONT REGIONAL COUNCIL

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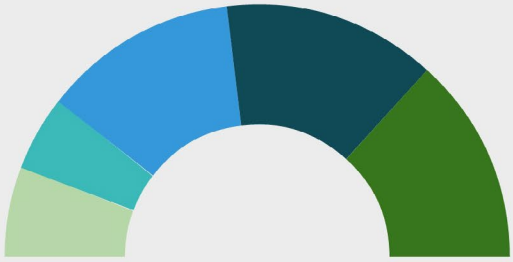
UTAH BROADBAND NONADOPTERS

The Wasatch Front Regional Council, which includes Weber, Morgan, Davis, Tooele and Salt Lake Counties, is the most highly populated area of the state, with an estimated population of 1,635,054.

NONADOPTERS OF BROADBAND IN THE WASATCH FRONT REGION ACCESS THE INTERNET INFREQUENTLY



- Several Times Each Day (12%)
- Once a Day (10%)
- 3-5 Days a Week (25%)
- 1-2 Days a Week (0%)
- Every Few Weeks (27%)
- Do Not Access (27%)

Among the region's nonadopters, gender, marital status, race and education statistics mirror the state average. The region's nonadopters were slightly younger than the state average, with an average age of 50.7 years. Respondents in the region also had lower total household incomes.

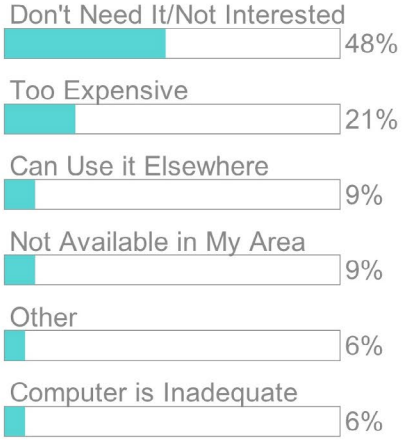
DO YOU KNOW HOW MANY ISP'S ARE IN YOUR AREA?

- No (86%)
- Yes (14%)

All counties, except for Morgan, have coverage for at least 88 percent of households at download speeds of 25 Mbps or higher. Morgan has coverage for only 11.95 percent at those speeds. Despite the region's higher than average household income, 37.3 percent of respondents did not have computer equipment in the home.

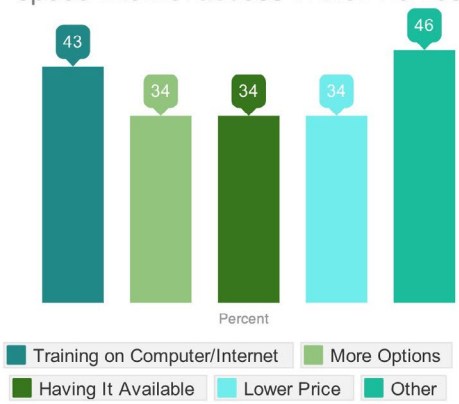
LACK OF INTEREST OR NEED

The key reason for nonadoption of broadband in the Wasatch Front region is a lack of interest or need. Almost half of respondents said they did not need high-speed Internet or were not interested in getting access in their homes.



KNOWLEDGE AND EXPERTISE

Respondents were asked to rate their computer skills on a scale of zero to 10, with 10 being very highly skilled. In the Wasatch Front region, 23.1 percent of respondents ranked their computer skills at a zero. Almost half of respondents said training on the computer/Internet would make them more likely to adopt high-speed internet access in their homes.



What would make you more likely to have high-speed Internet access in your home?

WASATCH FRONT REGIONAL COUNCIL

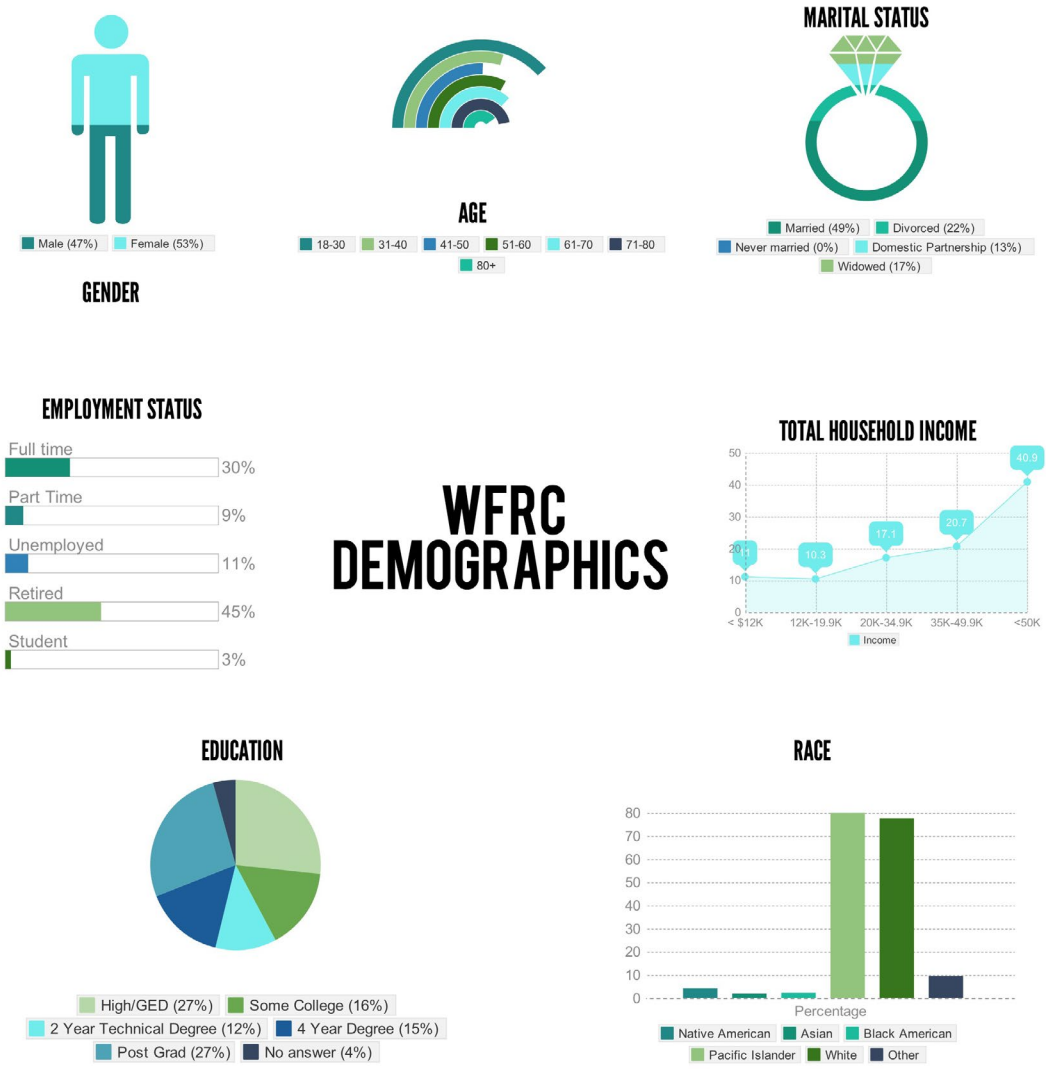
The Wasatch Front region, which includes Weber, Morgan, Davis, Tooele and Salt Lake Counties is the most highly populated area of the state, with an estimated population of 1,635,054.[5] The bulk of the population of this region is concentrated along the Western foothills of the Wasatch Mountain Range and concentrated along the I-15 corridor from Ogden to southern Salt Lake County. This region shares a largely urban and suburban character and a dominant position in the population of the state. Areas of Morgan and Tooele counties demonstrate a decidedly more suburban and somewhat rural character but are increasingly tied directly to the economic, social and cultural realities of nearby urbanized areas.

WASATCH FRONT REGIONAL COUNCIL

Demographic Picture

The respondents' demographic information in the Wasatch Front region generally did not vary widely from the state average. In this region, slightly more respondents were female (52.7 percent) than the state average (47.6 percent). Respondents in the Wasatch Front region were also older than the state average, with a mean age of 57.5 years compared to the state mean age of 56.2 years. Both the region and the state as a whole saw a wide distribution of age for respondents. Despite the older average age of respondents in the Wasatch Front region, the area had a lower percentage of

respondents with household members between 46 and 60 years old. Throughout the Wasatch Front region, the percentage of respondents who were married was 46.9 percent, similar to the state average of 48 percent.



Total household income for respondents in the Wasatch Front region was higher than the state average. In the region, mean total household income was $56,268 compared to the state's mean of $51,347. Although average income is higher in the Wasatch Front region, the standard deviation for this region's income is also higher, meaning that respondents' income is more varied here than in the state as a whole.

Employment status among respondents mirrors the state average. The two largest groups of nonadopters by employment status are those who are retired and those

who are employed full-time. Forty-five percent of respondents were retired, similar to the state average of 42.8 percent. The second biggest category of non-respondents was full-time employed, with 30.4 percent of respondents in the Wasatch Front region, the same as the state average of 30.4 percent. This employment information supports our earlier explanation that most nonadopters are older, since older people typically make up those who are retired.

Race statistics show a majority of respondents are white, both in the Wasatch Front region and in the state overall. Education statistics are also similar between the region and the state, with the largest categories of nonadopters being those who completed high school or obtained a GED and those who completed some college. In the Wasatch Front region, 31.1 percent of respondents completed high school or a GED, compared to 28 percent of the state overall. The smallest education category for nonadopters both in the region and the state was some high school, with five percent of the region's respondents and 4.2 percent of the state's overall respondents.

Low Internet Access Rates Among Nonadopters

Respondents were asked how often they access the Internet, and 26.5 percent of respondents in the Wasatch Front region said they never access the Internet. Just over 27 percent said they access the Internet once every few weeks and about 25 percent said they access it about three to five days a week. Those numbers correspond with the state's overall breakdown of Internet access frequency. Similarly, most respondents do not pay for a data plan on their cell phone. Clearly, the frequency of Internet access among nonadopters is low, although it is not clear whether that is due to lack of interest or desire to access the Internet, limited computer skills, the high cost of Internet access or limited access to technology. All of these are likely playing a role, although probably not with equal influence. We examine the role each of these reasons below.

Reasons for Nonadoption: Lack of Interest or Need

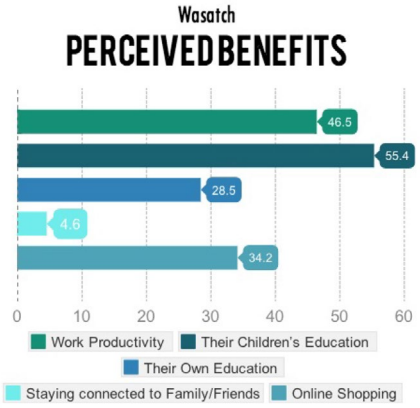
The key reason found for nonadoption at both the state level and in the Wasatch Front region was a lack of interest or need. Although other factors are also contributing to nonadoption, this was found to be the strongest influence. In the Wasatch Front region, almost half of respondents said they did not need high-speed Internet or

were not interested in getting it. That number was similar, although slightly lower, for the state as a whole, at 44 percent.

Respondents were also asked if they are interested in obtaining a faster connection, and lack of interest was expressed once again. In the Wasatch Front region, 67.7 percent of respondents were not interested in having a faster high-speed connection now or in the future. At the state level, that number was slightly lower but still over 60 percent. This means well over half of respondents both at the regional and state level are not interested in obtaining high-speed Internet.

Finally, respondents were asked about what would make them more likely to have high-speed Internet access in their homes. Almost half of respondents in the area said that training on the computer or Internet would make them more likely to get high-speed Internet access.

This suggests that the lack of interest in high-speed Internet may be related to the low level of computer and Internet skills among nonadopters. When asked what would make them more likely to adopt high-speed Internet, about 42 percent said having more options for providers, 33.5 percent said availability, and 28.8 percent said a lower price.



With these results, little can be done to increase adoption rates for broadband if lack of interest is the root of the problem. Interestingly, despite the low level of interest, nonadopters in the region said they would see benefits from access to high-speed home Internet service in terms of work productivity (46.5 percent), their children's education (55.4 percent), their own education (28.5 percent), staying connected to family/friends (4.6 percent) and shopping (34.2 percent). These benefits, however, have not translated into interest in obtaining access to high-speed Internet. Because

increasing demand is difficult, we turn to other reasons for nonadoption that policymakers may be able to more effectively address.

Reasons for Nonadoption: Knowledge and Expertise

When respondents were asked about their computer use and expertise, results found evidence that a lack of expertise about computers in general, and the Internet specifically, is likely playing a key role in nonadoption both in the Wasatch Front region and in the state.

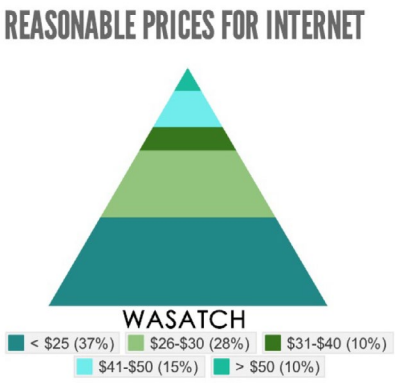
Respondents were asked to rate their computer skills on a scale of zero to 10, with zero being no computer skills and 10 being very highly skilled. In the Wasatch Front region, 23.1 percent of respondents ranked their computer skills at zero. Over 64 percent of respondents ranked their computer skills at a five or lower. Likewise, most respondents have not participated in a class, seminar or other programs to improve their computer or Internet skills. This means well over half of respondents in the region are not highly skilled at using a computer. These lack of skills are probably contributing to nonadoption of high-speed Internet in the Wasatch Front region.

When respondents in the Wasatch Front region were asked what would make them more likely to have high-speed Internet access in their homes, nearly 50 percent answered training on computer and Internet use. Providing training and educational programs geared toward increasing computer literacy and Internet skills may be one of the most effective ways to increase adoption rates for broadband.

Reasons for Nonadoption: Price

Another key reason cited for nonadoption at both the state and regional level is that high-speed Internet services are too expensive. About one-fifth of respondents in the

Wasatch Front region and at the state level said that the high cost of broadband is the main reason for nonadoption.



Respondents were asked how much high-speed Internet costs, and their responses were widely distributed: 19.8 percent of respondents in the Wasatch Front region and 14.23 percent of those at the state level answered over $90 per month. On the other end of the spectrum, 15.7 percent of respondents in the region said that high-speed Internet costs $25 or less per month. A 2011 study by Ryan Yonk and Randy Simmons, at Southern Utah University and Utah State University respectively, found that broadband customers statewide were actually paying, on average, between $42 and $43 per month for high-speed Internet service.[6]

When asked what a reasonable monthly price would be, almost half of respondents at the state level said high-speed Internet should cost less than $25 per month. In the Wasatch Front region only 37.2 percent believed high-speed Internet should cost less than $25 per month and 28.2 percent answered that $26-$30 would be reasonable. This tolerance for slightly higher prices may be explained by the fact that household incomes are higher in the region than the state average. For comparison, in 2011, Yonk and Simmons found that rural respondents in Utah were willing to pay an average of $33.13 per month for high-speed Internet services compared to non-rural respondents who were willing to pay $34.75.[7]

Just over 28 percent of respondents in the Wasatch Front region said that if high-speed Internet were to cost less, they would be more likely to get access in their homes. Reducing the cost of high-speed Internet services may be necessary to increase adoption rates. Although these policies are not recommended, subsidizing either the supply or the demand side of the high-speed Internet market may be one way to achieve this.

Reasons for Nonadoption: Not Available

Another reason found for nonadoption is the technology necessary to access high-speed Internet may not be available. Respondents were asked whether they have

computer equipment in their homes. Surprisingly, 37.3 percent of respondents in the Wasatch Front region did not have computer equipment in their home, while 42.7 percent answered that they did, the remaining 10 percent did not respond. This is surprising because over two-thirds of respondents state-wide had a computer in their home. Because the Wasatch Front region is more urban than much of the state and has higher household incomes, we would expect a higher rate of home computers than the state average, but that is not what the data shows. The relatively low rate of computers in homes is likely contributing to nonadoption since computers are the most common type of hardware used to access high-speed Internet.

In examining reasons for nonadoption, respondents seem to suffer from a lack of knowledge. Both the Wasatch Front region and the State of Utah had approximately 60 percent of respondents answer that high-speed Internet is not available in their area. This information is most likely inaccurate, however, because about 85 percent of respondents in both the region and the state did not know how many providers were available in their area. This means there may be providers of high-speed Internet available that respondents simply don't know about.

Data for broadband coverage shows that coverage in the Wasatch Front region is generally very good. All counties in the region have coverage for 99 percent of households at download speeds of 10 Mbps or higher. All counties except for Morgan have coverage for at least 88 percent of households at download speeds of 25 Mbps or higher. Morgan County has coverage for only 11.95 percent of households at download speeds of 25 Mbps or higher. This analysis did not evaluate specific upload speeds by county, which was done in order to facilitate an enhanced evaluation of download speeds by county. With this information, most respondents in the Wasatch Front region are not aware that high-speed Internet availability is generally good in their area.

As far as availability goes, policymakers could help solve the knowledge problem by educating people about the high-speed Internet options available in their area. As for the lack computers in the home, this is a more difficult policy question to solve

because it is not clear if people are not purchasing computers because they cannot afford them, because they don't know how to use them, or because they are simply not interested in using them. Morgan County could consider enacting policies to incentivize increased broadband coverage at higher speeds, to help the county catch up with the rest of the region and the state.

NOTES

MOUNTAINLAND ASSOCIATION OF GOVERNMENTS REGION

THE STATE OF UTAH
BROADBAND PROJECT
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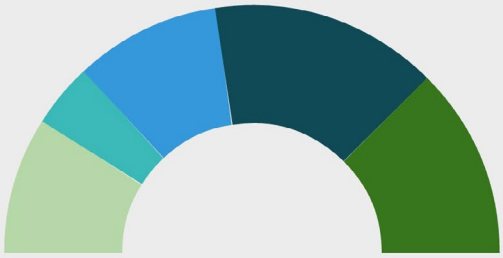
UTAH BROADBAND NONADOPTERS

The Mountainland Association of Governments (MAG) region includes Summit, Wasatch and Utah Counties and has a population of approximately 576,418. The MAG region includes the resort towns of Heber and Park City along with the Wasatch Front communities from American Fork to Provo.

NONADOPTERS OF BROADBAND IN THE MAG REGION ACCESS THE INTERNET INFREQUENTLY



Several Times Each Day (18%) | Once a Day (8%)
3-5 Days a Week (19%) | 1-2 Days a Week (0%)
Every Few Weeks (30%) | Do Not Access (25%)

The region's nonadopters were slightly younger than the state average, with an average age of 51.5 years compared to the state average of 56.2. Respondents in the MAG region make, on average, $55,106 per year in total household income, which is higher than the state average of $51,347.

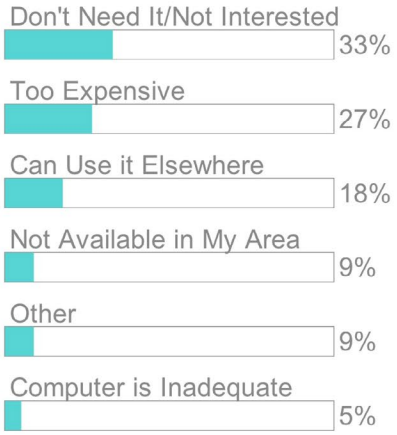
DO YOU KNOW HOW MANY ISP'S ARE IN YOUR AREA?

No (86%) | Yes (14%)

A large majority of respondents did not know how many providers were available. Despite the region's higher than average household income, 30.4 percent of respondents did not have computer equipment in the home. Broadband coverage for the region is generally high for download speeds of at least 25 Mbps.

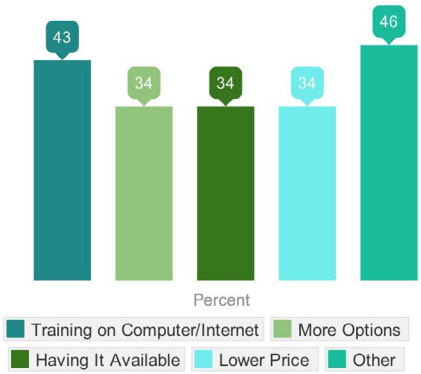
LACK OF INTEREST OR NEED

The key reason for nonadoption of broadband in the region is a lack of interest or need. In the MAG region, more than one-third of respondents said they did not need high-speed Internet or were not interested in getting access in their homes.



KNOWLEDGE AND EXPERTISE

Respondents were asked to rate their computer skills on a scale of zero to 10, with zero being no computer skills and 10 being very highly skilled. Almost 61 percent ranked their computer skills at a five or lower. Also, 63.3 percent said more training on the computer would make them more likely to purchase broadband.



What would make you more likely to have high-speed Internet access in your home?

THE MOUNTAINLAND ASSOCIATION OF GOVERNMENTS REGION

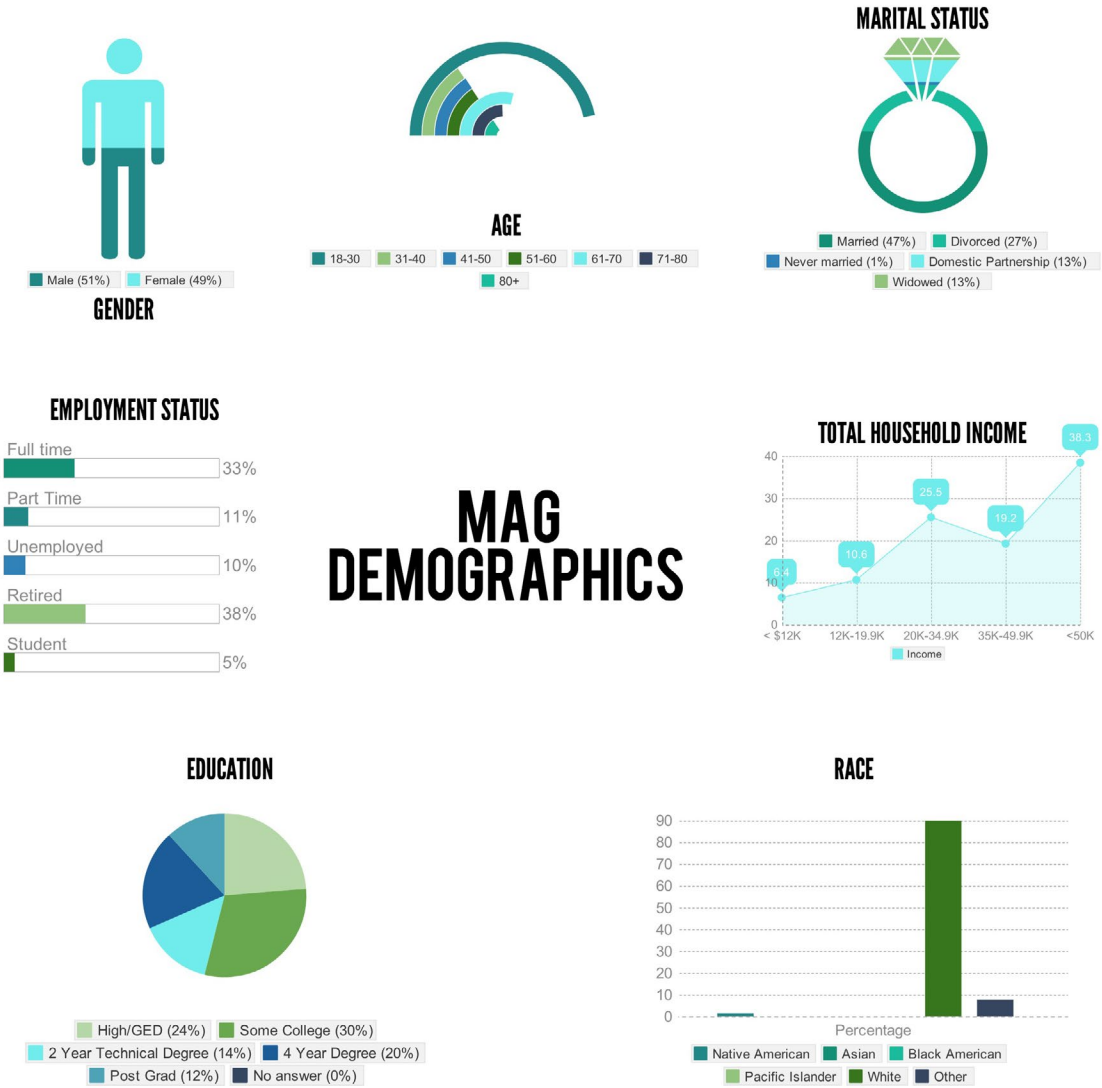
The Mountainland Association of Governments (MAG) region includes Summit, Wasatch and Utah Counties and has a population of approximately 576,418.[5] The MAG region, which includes the resort towns of Heber and Park City along with the Wasatch front communities from American Fork to Provo, is an interesting contrast in political, cultural and economic demographics. This region is dominated by the urban and suburban communities located in Utah County, with the bulk of the region's population residing along the Southern I-15 corridor that transects Utah County from north to south.

MOUNTAINLAND ASSOCIATION OF GOVERNMENTS REGION

Demographic Picture

The demographics of the MAG region were similar to the state averages. A higher proportion of the region's respondents were female (49.4 percent) than the state average of only 47.6 percent. Respondents in the MAG region were also slightly older, with an average age of 51.5 compared to the state average of 56.2 years. Both the region and the state as a whole saw a wide distribution of age for respondents.

Most of the region's nonadopters were either married (46.8 percent) or had never been married (26.6 percent).



In terms of employment status, 38 percent of respondents in the region were retired, lower than the state average of 42.8 percent. Respondents in the MAG region earn, on average, $55,106 per year in total household income, higher than the state average of $51,347.

Almost 90 percent of the region's respondents were white, which is higher than the state average. In terms of education, the MAG region's nonadopters had more bachelor's degrees than the state average. Of the respondents in the region, 19 percent

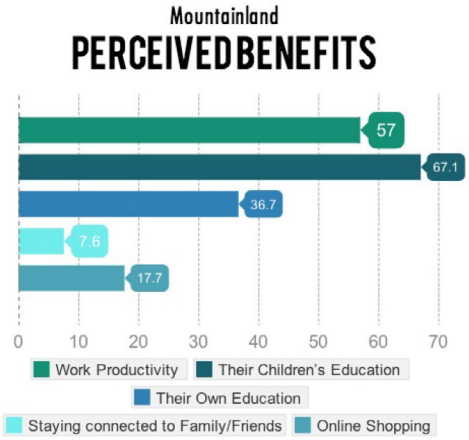
had completed a four-year degree, compared to the state average of 16.8 percent. The region's respondents however, had a lower rate of completing two-year technology degrees (13.9 percent), but higher rates of completing some college (29.1 percent) than the state average.

Low Internet Access Rates Among Nonadopters

When respondents were asked how often they access the Internet, 26.6 percent said they never get online. In the MAG region, 31.7 percent said they access the Internet once every few weeks and 20.25 percent said they access it three to five days a week. Those numbers are similar to the state breakdown for Internet access among nonadopters. This means a large segment of nonadopters do not use the Internet regularly.

Despite these numbers, the region has a higher than average percentage of nonadopters who get online several times a day, with 19 percent compared to just 14.8 percent statewide. In seeking to understand why people in the MAG region do not get online or do not use the Internet more frequently, it is not clear whether that is due to lack of interest or desire to access the Internet, limited computer skills, the high-cost of Internet access or limited access to technology. All of these are likely play a role, although probably not with equal influence. We examine the role of each of them below.

Reasons for Nonadoption: Lack of Interest or Need

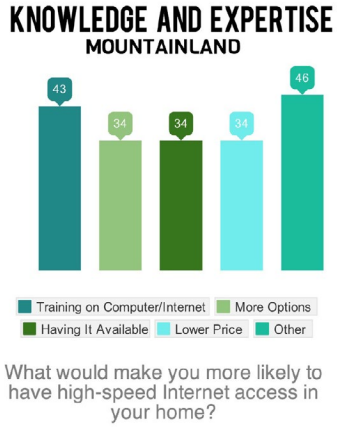


The key reason found for nonadoption at both the state level and in the MAG region was a lack of interest or need. Although other factors also contribute to nonadoption, this was found to be the strongest influence. When asked what the main reason is for nonadoption, 32.9 percent of respondents in the MAG region said that they don't need high-speed Internet or are not interested in getting it. That is lower than the state average of 44 percent. Respondents were also asked if they are interested in obtaining a faster connection, and lack of interest

was expressed once again. Of the region's respondents, 41.2 percent said they were not interested in obtaining a faster connection. That number was far lower than the state average of 61.4 percent.

With these results, little can be done to increase adoption rates for broadband if lack of interest is the root of the problem. Interestingly, despite the low level of interest, nonadopters in the region said they would see benefits from access to high-speed home Internet service in terms of work productivity (57 percent), children's education (67.1 percent), their own education (36.7 percent), staying connected to family or friends (7.6 percent) and online shopping (17.7 percent). These perceived benefits, however, have not translated into interest in obtaining access to high-speed Internet. Because increasing demand is difficult, we turn to other reasons for nonadoption that policymakers may be able to more effectively address.

Reasons for Nonadoption: Knowledge and Expertise



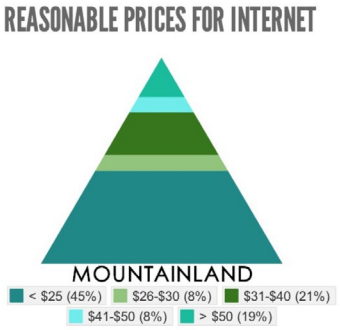
When respondents were asked about their computer use and expertise, results found evidence that a lack of expertise about computers in general, and the Internet specifically, is likely playing a key role in nonadoption both in the MAG region and in the state as a whole.

Respondents were asked to rate their computer skills on a scale of zero to 10, with zero being no computer skills and 10 being very highly skilled. Over 60 percent of respondents in the region ranked their computer skills at a five or below, which approximates the statewide figure of 65 percent. That means a large majority of the nonadopters in the MAG region believe they are not highly skilled. This lack of skills or lack of perceived skills is most likely contributing to nonadoption of high-speed Internet in the MAG region.

When respondents were asked what would make them more likely to have high-speed Internet in their homes, 63.3 percent of respondents in the region said training on computer and Internet use. Providing training and educational programs geared

toward increasing computer literacy and Internet skills may be one of the most effective ways to increase adoption rates for broadband.

Reasons for Nonadoption: Price



Another key reason cited for nonadoption at both the state and regional level is that high-speed Internet services are too expensive. When asked what is the main reason they do not have broadband in their homes, 26.6 percent of respondents in the MAG region said that it is too expensive. That number is similar to the state average.

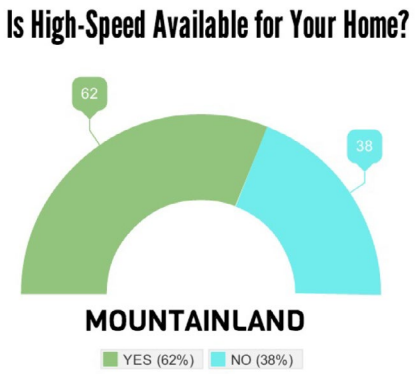
Respondents were asked how much high-speed Internet costs, and their responses were widely distributed: 14.6 percent said under $25 per month, 17.1 percent said between $26 and $35 per month, and 14.6 percent said between $36 and $45. Only 9.8 percent believed high-speed Internet costs over $90 per month. A 2011 study by Ryan Yonk and Randy Simmons, at Southern Utah University and Utah State University respectively, found that broadband customers statewide were actually paying, on average, between $42 and $43 per month for high-speed Internet service.[6]

Respondents were also asked what a reasonable monthly price for high-speed Internet would be, and almost half (45.3 percent) said less than $25 per month. That number is lower but close to the state average. Yonk and Simmons also found that rural respondents in Utah were willing to pay an average of $33.13 per month for high-speed Internet services compared to non-rural respondents who were willing to pay $34.75.[7]

When respondents were asked what would make them more likely to have high-speed Internet in their homes, 41.8 percent said a lower price for services. Reducing the cost of high-speed Internet services may be necessary to increase adoption rates.

Although it would not be recommended, subsidizing either the supply or the demand side of the high-speed Internet market may be one way to achieve this.

Reasons for Nonadoption: Not Available



Another reason found for nonadoption is that the technology necessary to access high-speed Internet may not be available. Respondents were asked whether they have computer equipment in their homes. Nearly 70 percent of respondents reported that they had computer equipment in their homes, while 30.4 percent reported that they did not. Statewide, over two-thirds of respondents had a computer in their home. It is not surprising that the MAG region would have a higher rate of home computers due to the comparatively higher incomes and younger population of the region's respondents. But with such a relatively high computer access rate, it is likely not contributing as much to nonadoption.

In examining reasons for nonadoption, respondents seem to suffer from a lack of knowledge. The MAG region had 62 percent of respondents answer that high-speed Internet is available in their area. This information is more a misperception than a reality. Data for broadband availability show that all three counties included in the region (Summit, Wasatch and Utah) have broadband coverage at download speeds of 10 Mbps or higher for more than 99 percent of households. Coverage by county is a little more variable at download speeds of 25 Mbps or greater: Summit has 91.4 percent coverage, Wasatch has 82.6 percent, and Utah has 95.6 percent. This analysis did not evaluate specific upload speeds by county, which was done in order to facilitate an enhanced evaluation of download speeds by county. With this data it shows that broadband availability in the region is varied but all have a

majority of households covered by high-speed Internet, indicating that residents are uninformed about their options.

About 85 percent of respondents in the region and the state, however, did not know how many providers were available in their area. Clearly, there is a perception of limited availability.

Because the MAG region already has such high availability for broadband, the problem is primarily one of knowledge. Policymakers could help solve the knowledge problem by educating people about the high-speed Internet options available in their area. But, regardless, if the consumer is uninterested in the service and doesn't have access to the equipment, education will be fruitless. It is possible the consumers, because of their unfamiliarity with it, do not realize the potential benefits of the Internet and how it could improve their lives through increased communication and access to information. This should be a key component of any community outreach to nonadopters.

UINTAH BASIN ASSOCIATION OF GOVERNMENTS REGION

THE STATE OF UTAH
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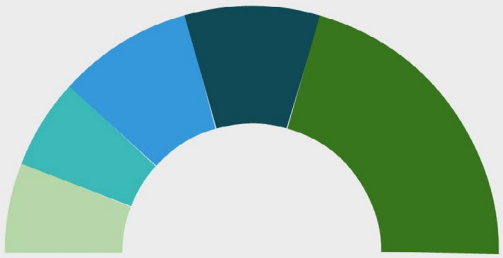
UTAH BROADBAND NONADOPTERS

The Uintah Basin Association of Governments (UBAOG) region, which includes Duchesne, Daggett, and Uintah Counties, is among the smallest Associations of Governments (AOGs) in Utah, with an estimated population of 52,254.

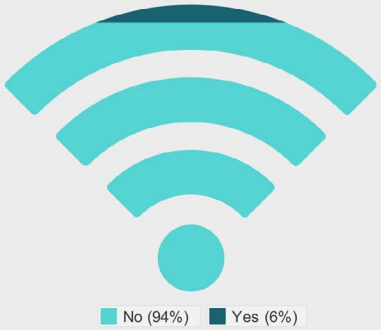
NONADOPTERS OF BROADBAND IN THE UINTAH BASIN REGION ACCESS THE INTERNET INFREQUENTLY



Several Times Each Day (12%) | Once a Day (12%) | 3-5 Days a Week (18%) | 1-2 Days a Week (0%) | Every Few Weeks (18%) | Do Not Access (41%)

Among the region's nonadopters, gender, marital status, race and education statistics largely mirror the state figures. The region's nonadopters were older than the state average, with an average age of 62.8 years. Respondents in the region also had a lower average household income at $38,833 compared to the state average.

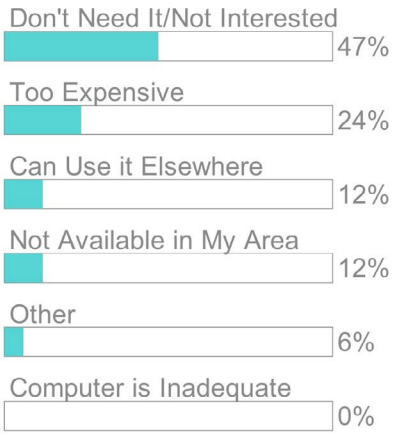
DO YOU KNOW HOW MANY ISP'S ARE IN YOUR AREA?



A majority of respondents did not know how many providers were available. Potentially due to the region's lower than average household income, 35.4 percent of respondents did not have computer equipment in the home.

LACK OF INTEREST OR NEED

The key reason for nonadoption of broadband in the region is a lack of interest or need. In the UBAOG region, nearly half of respondents said they did not need high-speed Internet or were not interested in getting access in their homes.



KNOWLEDGE AND EXPERTISE

Respondents were asked to rate their computer skills on a scale of zero to 10, with zero being no computer skills and 10 being very highly skilled. In the UBAOG region, 41.2 percent of respondents ranked their computer skills at a zero.

What would make you more likely to have high-speed Internet access in your home?

UINTAH BASIN ASSOCIATION OF GOVERNMENTS REGION

The Uintah Basin Association of Governments (UBAOG) region, which includes Duchesne, Daggett and Uintah Counties, is among the smallest of the regions included in this report, with an estimated population of 52,254. The Uintah Basin, which is nestled among the Uintah Mountains is often known as the 'Basin.' The region has been home to substantial oil and gas development in recent years, the effects of which can be readily identified in the local communities especially in the somewhat varying nature of the population. The UBAOG region also has a substantial Native American population and is home to large portions of the Uintah and Ouray Indian Reservation.

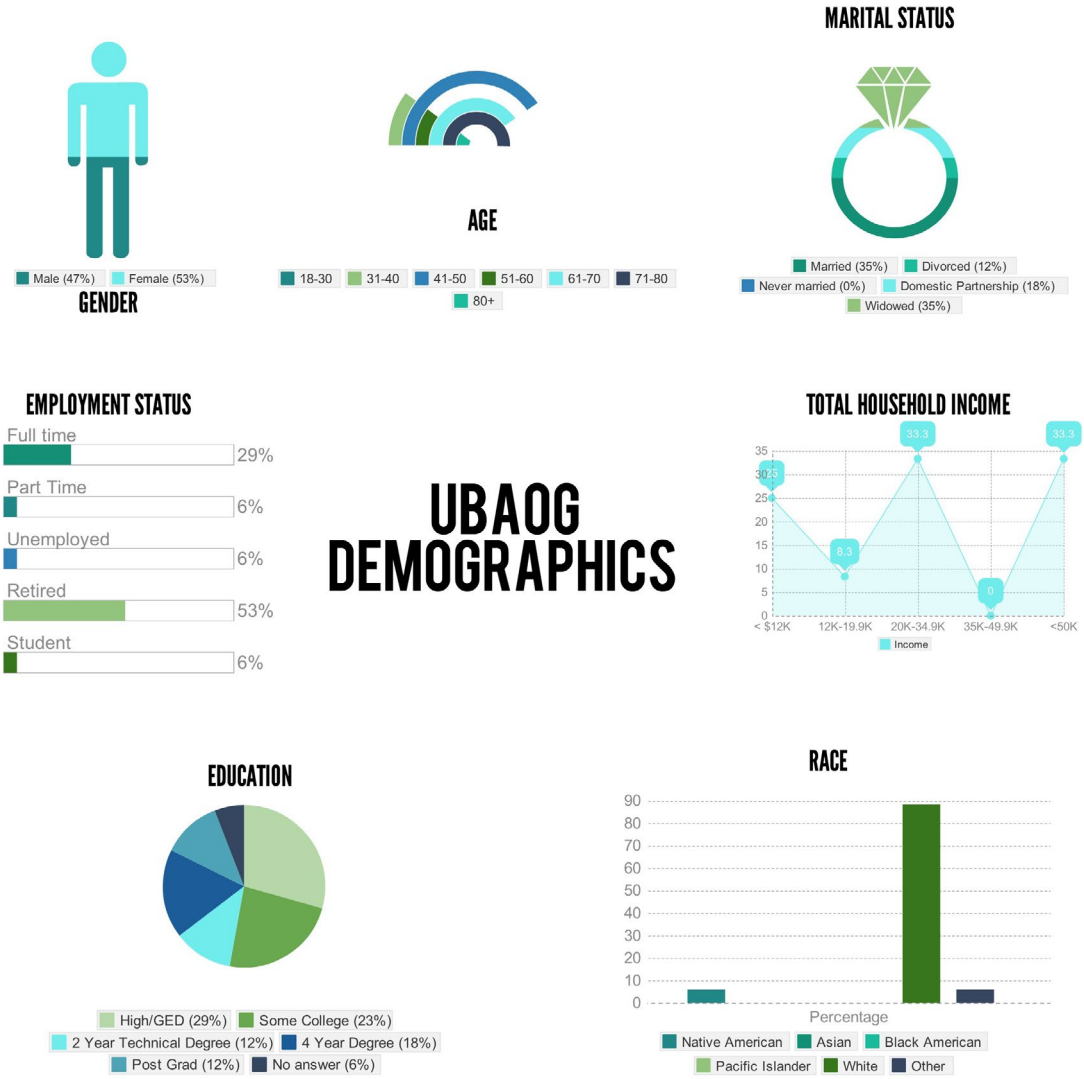
UINTAH BASIN ASSOCIATION OF GOVERNMENTS REGION

Demographic Picture

The respondents' demographic information in the UBAOG region varied somewhat from the state averages. In this region, slightly more respondents were female (52.9 percent) than the state average (47.6 percent). Respondents in the UBAOG region were older than the state average, with a mean age of 62.8 years compared to the state mean age of 56.2 years. This region saw a somewhat narrower age distribution

among respondents with stronger clustering in the upper age ranges than the state as a whole, which saw a wide distribution of age for respondents. This older overall age is a direct result of the area having a much higher percentage of respondents with household members over 61 years old (62.5 percent in Uintah compared to 47.75 percent statewide). In the UBAOG region, the percentage of respondents who were married was 35.3 percent, substantially lower than the state average of 48 percent. Other categories within marital status also differed considerably from the overall state averages.

Total household income for respondents in the UBAOG region was much lower than the state average. In the region, the mean total household income was $38,833



compared to the state's mean of $51,347. The standard deviation for this region's income is substantially lower than the state average, meaning that respondents' income is less varied here than in the state as a whole.

The employment status among respondents mirrors the state average with two exceptions: a smaller percentage of respondents are employed part time and a substantially higher percentage of respondents are retired. The two largest groups of nonadopters by employment status are those who are retired and those who are employed full-time. Of respondents, in the region, 52.9 percent were retired, compared to the state average of 42.8 percent, likely reflecting the older age demographics of the region. The second biggest category of nonadopters was full-time employed residents, with 29.4 percent of respondents in the UBAOG region, similar to the state average of 30.4 percent. This employment information mirrors our age data, particularly in this region as most nonadopters are older and therefore, more likely to be retired.

Statistics on race show a majority of respondents are white, both in the UBAOG region and in the state overall. The region varies substantially from the state averages in terms of the diversity of races with 5.9 percent of respondents reporting Native American heritage compared to the state average of 4.2 percent. Education statistics are similar between the region and the state, with the largest categories of nonadopters being those who completed high school or obtained a GED and those who completed some college. In the UBAOG region, 29.4 percent of respondents completed high school or a GED, compared to 28 percent of the state overall. The smallest education category for nonadopters both in the region and the state was some high school, with 5.9 percent of the region's respondents and 4.2 percent of the state's overall respondents.

The demographic realities of the UBAOG region indicate a region that is older with a lower average income than the state while mirroring state averages on most other demographic variables.

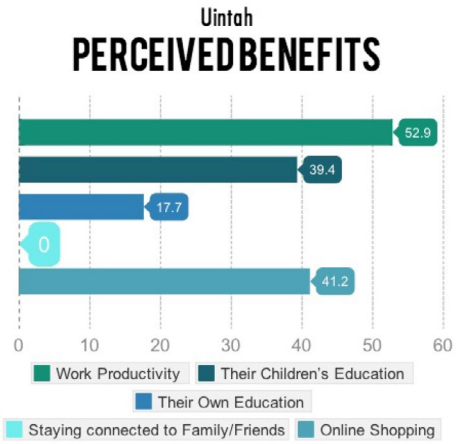
Low Internet Access Rates Among Nonadopters

Respondents were asked how often they access the Internet, and 41.2 percent of respondents in the UBAOG region said they never access the Internet. Additionally, 17.7 percent said they access the Internet once every few weeks and about 17.7 percent

said they access it about three to five days a week. Those numbers are dramatically different than the state's overall breakdown of Internet access frequency. Respondents in the Uintah Basin are much more likely to report no Internet usage than the state average where 24.8 percent statewide indicate no use.

Similarly, more respondents do not pay for a data plan on their cell phone, at over 75 percent in the UBAOG region compared to about 65 percent statewide. In the UBAOG region, the frequency of Internet access among nonadopters is lower than the already low state average, although it is not clear whether that is due to lack of interest or desire to access the Internet, limited computer skills, the high cost of Internet access or limited access to technology. To better understand these drivers we examine the role each of these reasons below.

Reasons for Nonadoption: Lack of Interest or Need



The key reason found for nonadoption at both the state level and in the UBAOG region was a lack of interest or need. In the UBAOG region, 47 percent of respondents said they did not need high-speed Internet or were not interested in getting it. That number was similar, although slightly higher, than the state as a whole, at 44 percent.

Respondents were also asked if they are interested in obtaining a faster connection, and lack of interest was expressed once again. In the UBAOG region, 70.6 percent of respondents were not interested in having a faster high-speed connection now or in the future. At the state level, that number was substantially lower but still over 60 percent. This means nearly three-quarters of respondents at the regional level and over half at state level are not interested in obtaining high-speed Internet.

Finally, respondents were asked about what would make them more likely to have high-speed Internet access in their homes. More than a third of respondents in the area said that training on the computer or Internet would make them more likely to get high-speed Internet access, and nearly a quarter indicated more options in

service would increase the likelihood. This suggests that the lack of interest in high-speed Internet may be related to the low level of computer and Internet skills among nonadopters. When asked what other reasons would make them more likely to adopt high-speed Internet, 17.7 percent said availability and 17.7 percent said a lower price.

With these results, little can be done to increase adoption rates for broadband if lack of interest is the root of the problem. In this region, there is some evidence that a more diversified marketplace could potentially increase interest. Interestingly, despite the low level of interest, nonadopters in the region said they would see benefits from access to high-speed home Internet service in terms of work productivity (52.9 percent), their children's education (39.4 percent), their own education (17.7 percent) and shopping (41.2 percent). These benefits, however, have not translated directly into interest in obtaining access to high-speed Internet in the home. Because increasing demand is difficult, we turn to other reasons for nonadoption that policymakers may be able to more effectively address.

Reasons for Nonadoption: Knowledge and Expertise

What would make you more likely to have high-speed Internet access in your home?

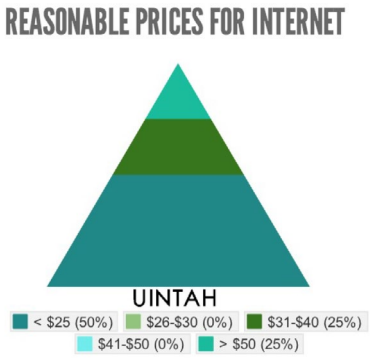
When respondents were asked about their computer use and expertise, results found evidence that a lack of expertise about computers in general, and the Internet specifically, is likely playing a key role in nonadoption both in the UBAOG region and in the state.

Respondents were asked to rate their computer skills on a scale of zero to 10, with zero being no computer skills and 10 being very highly skilled. In the UBAOG region, 41.2 percent of respondents ranked their computer skills at zero, which is well above the state average of about 23 percent. Over 76 percent of respondents ranked their computer skills at a five or lower. Likewise, nearly three-quarters of respondents have not participated in a

class, seminar or other program to improve their computer or Internet skills. This lack of skills is probably contributing to nonadoption in the UBAOG region.

However, when respondents in the UBAOG region were asked what would make them more likely to have high-speed Internet access in their homes, only 35 percent answered training on computer and Internet use would increase the likelihood of adoption. Providing training and educational programs geared toward increasing computer literacy and Internet skills might be a potential way to increase adoption rates for broadband, although at a substantially lower impact rate than other regions.

Reasons for Nonadoption: Price



Another reason cited for nonadoption at both the state and regional level is that high-speed Internet services are too expensive. Of respondents in the UBAOG region, 11.8 percent reported that the cost of access was the main reason they did not have in-home broadband Internet. This rate is far lower than the nearly one-fifth of respondents statewide who reported price as the primary reason.

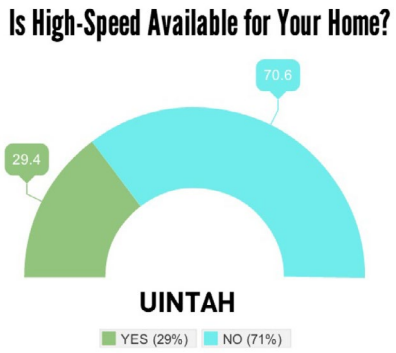
To further explore this area, respondents were asked how much high-speed Internet costs, and their responses were widely distributed. One third of respondents said that high-speed Internet service costs under $25 per month, another third said between $46 and $55 per month, and the final third of respondents said between $66 and $90 per month. A 2011 study by Ryan Yonk and Randy Simmons, at Southern Utah University and Utah State University respectively, found that broadband customers statewide were actually paying, on average, between $42 and $43 per month for high-speed Internet service.

When asked what a reasonable monthly price should be, almost half of respondents at the state level and exactly 50 percent in the UBAOG region said high-speed Internet should cost less than $25 per month. Another 25 percent answered that $31-40 would be reasonable and 25 percent thought it should cost over $50. This split tolerance for prices with a larger cluster at the low end is likely due to the high variability of incomes in the region. For comparison, Yonk and Simmons found that rural respondents in Utah were willing to pay an average of $33.13 per month for

high-speed Internet services compared to non-rural respondents who were willing to pay $34.75.

Despite the respondents from this region clustering at low price thresholds, only 17.7 percent of respondents in the UBAOG region said that if high-speed Internet were to cost less, they would be more likely to get access in their homes. Based on these data, reducing the cost of high-speed Internet will have limited impacts on increasing adoption in this region.

Reasons for Nonadoption: Not Available



Another reason found for nonadoption is that the technology necessary to access high-speed Internet may not be available. Unlike many other AOG regions and the state as a whole, respondents in the UBAOG region more frequently reported a lack of access to high-speed Internet. Despite this perceived lack of penetration, only 70.6 percent of respondents cited lack of availability as the primary reason they do not have home based high-speed Internet. Additionally, only 5.9 percent of respondents knew how many providers were available in their area compared to the state average of 15.2 percent.

Data for broadband availability show that Uintah, Duchsene and Daggett Counties all have broadband available to nearly 100 percent of households at download speeds of at least 3 Mbps. In Duchesne County, 99.9 percent of residents have access to 3 Mbps service and 97.85 percent have access to 10 Mbps, but only 17.88 percent of households have access to download speeds of at least 25 Mbps. Uintah County is similar to Duchesne County where almost 100 percent of residents have access to 3 Mbps and 99.77 percent have access to 10 Mbps and then drops to 36.3 percent of households with download speeds at 25 Mbps. In Daggett County, 100 percent of residents have access to 3 Mbps but no residents have access to higher speeds. This data shows that broadband availability in the region, particularly in Daggett County, is below the rest of the state and that lack of availability may be a key factor in limiting adoption. This analysis also did not evaluate specific upload speeds by

county, which was done in order to facilitate an enhanced evaluation of download speeds by county.

Within the region, 64.6 percent of UBAOG respondents did not have computer equipment in their homes. This result is close to the 61.4 percent of respondents statewide who reported that they had a computer in their home. The low rate of computers in homes is likely contributing to nonadoption since they are the most common type of hardware used to access high-speed Internet.

To increase adoption rates, policymakers have two potential options in this region. First they could provide trainings to encourage nonadopters to utilize broadband technologies. As for the lack computers in the home, this is a more difficult policy question to solve because it is not clear if people are not purchasing computers because they cannot afford them, because they don't know how to use them, or because they are simply not interested in using them. Second, there does appear to be some potential for additional build out and increased service provisions that might entice some potential users to adopt. A combination of policies may be needed to address skill levels, price, availability and demand.

NOTES

SIX COUNTY ASSOCIATION OF GOVERNMENTS REGION

THE STATE OF UTAH
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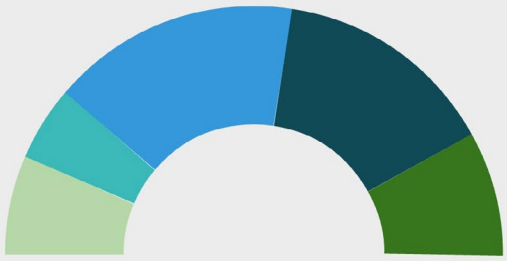
UTAH BROADBAND NONADOPTERS

The Six County Association of Governments region in central Utah includes Juab, Millard, Piute, Sanpete, Sevier and Wayne Counties with an estimated population of 75,707. The region is mostly rural with a focus on resources extraction, farming and ranching.

NONADOPTERS OF BROADBAND IN THE SIX COUNTY REGION ACCESS THE INTERNET INFREQUENTLY



- Several Times Each Day (13%)
- Once a Day (10%)
- 3-5 Days a Week (32%)
- 1-2 Days a Week (0%)
- Every Few Weeks (29%)
- Do Not Access (16%)

The average age of respondents in the region is 59.9 years, compared to the state average of 56.2. Respondents' average household income of $46,428 is lower than the state average of $51,347. The region's nonadopters have a higher rate of unemployment than the state average and receive less education than the state average.

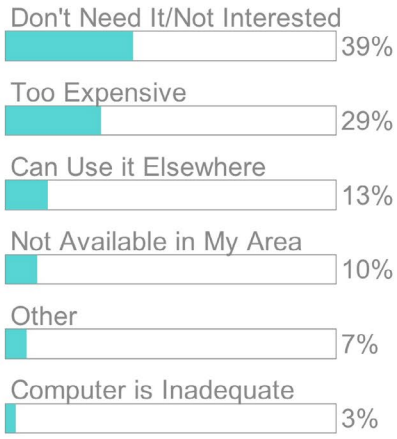
DO YOU KNOW HOW MANY ISP'S ARE IN YOUR AREA?

- No (87%)
- Yes (13%)

Like the state as a whole, a majority of respondents did not know how many providers were available. Most households have access to speeds of at least 10 Mbps, while Millard, Sanpete and Piute Counties are at or below 60 percent for household download speeds of at least 25 Mbps and above. Despite the region's lower than average household income, 84.2 percent of respondents have computer equipment in the home.

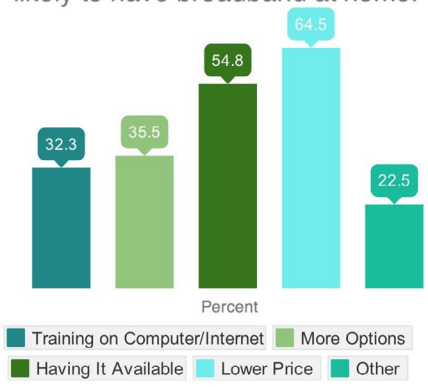
LACK OF INTEREST OR NEED

The key reason for nonadoption of broadband in the Six County region is a lack of interest or need. More than one-third of respondents said they did not need high-speed Internet or were not interested in getting access in their homes.



KNOWLEDGE AND EXPERTISE

Respondents were asked to rate their computer skills on a scale of zero to 10, with zero being no computer skills and 10 being very highly skilled. In the Six County region, 90.3 percent of respondents ranked their computer skills at a five or lower. Nearly two-thirds of respondents said training would make them more likely to have broadband at home.

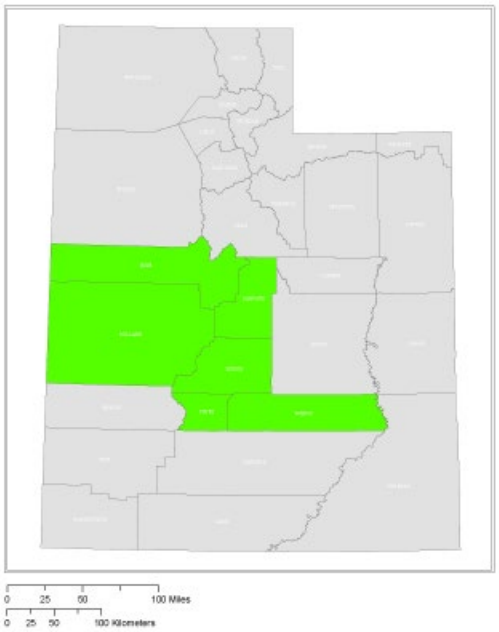


Do you know how many providers of high-speed Internet service are in your area?

SIX COUNTY ASSOCIATION OF GOVERNMENTS REGION

The Six County Association of Governments region includes Juab, Millard, Piute, Sanpete, Sevier and Wayne Counties, which includes most of central Utah, with a combined estimated population of 75,707.[11] Communities in the Six County region have a rural character with substantial resource extraction, farming, ranching and other agricultural production activities being the primary economic activities of the region. Small rural communities typify the region with population centers such as Richfield, Ephraim and Manti serving as regional centers for access to services.

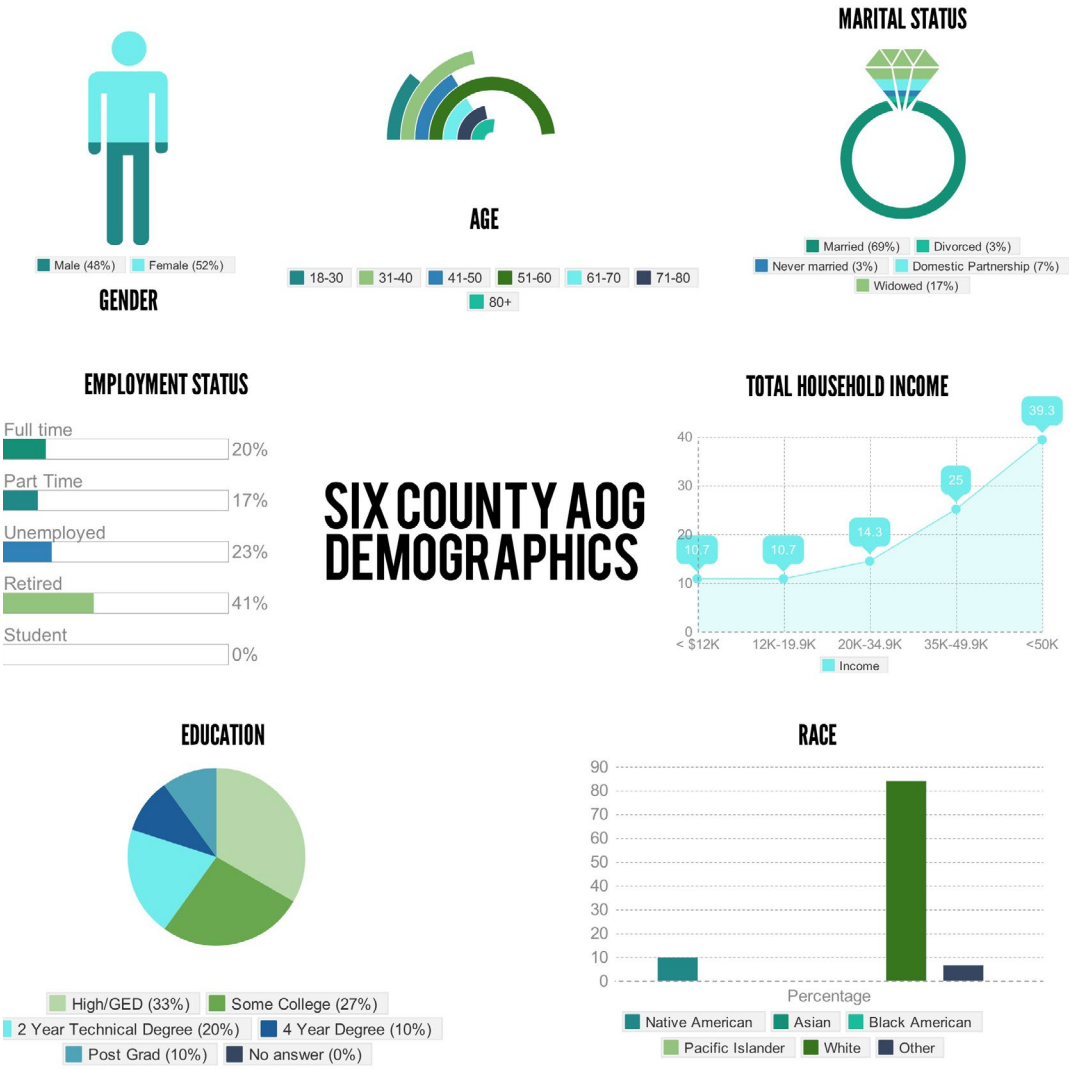
SIX COUNTY ASSOCIATION OF GOVERNMENTS REGION



Demographic Picture

The Six County region varies slightly from the state average on demographic indicators including age and income. Respondents in the region were 51.6 percent female compared to the state average of 47.6 percent. Respondents were also slightly older than the state average of 56.2 with a mean age of 59.9 years. The age of respondents varied, with a higher concentration (30 percent) in the 51-60 year old range, 13.3 percent in the 71-80 range, and 16.7 percent in the over 80 year old range. In the Six County region, a much lower percentage of households (15.8 percent) had members between the ages of 19 and 30 than the state average of 42.3 percent of households. The Six County region had a higher percentage of respondents who

were married (64.5 percent) compared to the state average of 48 percent. The region also had a lower rate of divorce than the state average and a similar rate of those who were widowed.



Households of respondents in the Six County region made less per year ($46,428 on average), than the state average of $51,347. A higher percentage of households in the region, 25 percent, made between $35,000 and $49,999 per year, than the state average (18.2 percent) for that income bracket. Also, 39.3 percent of respondents in the region made more than $50,000 per year. Although average income is slightly

lower in the region, a large percentage of respondents fall within the higher income brackets for total household income included in our survey.

Respondents in the Six County region saw a rate of unemployment that was more than double the state average of 10.6 percent (among the state's nonadopters). Most respondents in the Six County region were white (83.9 percent), with the percentage slightly higher than the state average of 80.6 percent. The region's respondents were more likely to be Native American (9.7 percent), than the state average of 4.2 percent. The region is home to several Native American Reservations including the Paiutes and Goshutes.

Respondents in the region generally had received less education than the state average. For example, 9.7 percent of respondents in the Six County region had received a four-year degree compared to the state average of 16.8 percent. Similarly, only 9.7 of the region's respondents had completed postgraduate education, compared to a state rate of 12.2 percent. About one-fifth of the region's respondents had earned two-year or technical degrees.

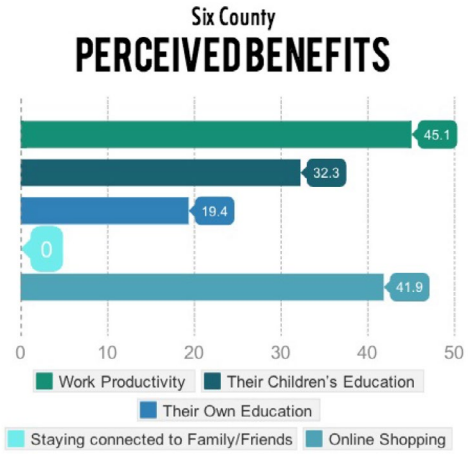
Low Internet Access Rates Among Nonadopters

Respondents in the Six County region were asked how often they access the Internet, with 16.1 percent saying they do not access it at all. This rate is actually lower than the state average of 24.8 percent. Of respondents in the Six County region, 29 percent said they access the Internet every few weeks (similar to the state average). About 32.3 percent said they access it three to five days a week, with 9.7 percent accessing it once a day and 12.9 percent accessing it several times per day. That means about 45.1 percent of respondents in the region access the Internet less than once a week.

Similarly, more respondents in the region pay for a data plan on their cell phone (40.5 percent) than the state average of 34.8 percent. That means a majority of respondents (59.5 percent) do not pay for a data plan on their cell phone. Although it is higher than the state average by some measures, Internet access among non-responders in the Six County region is still limited. It is not clear, however, whether that is due to lack of interest or desire to access the Internet, limited computer skills, the high-cost

of Internet access or limited access to technology. To better understand these drivers we examine the role each of these reasons below.

Reasons for Nonadoption: Lack of Interest or Need



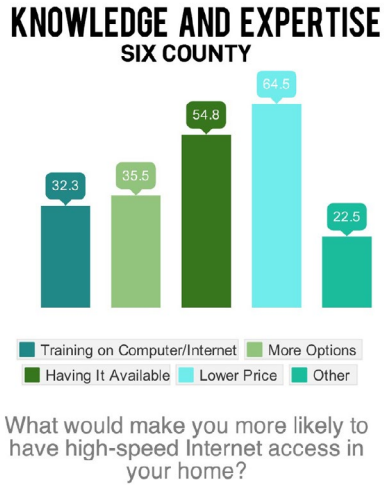
The key reason for nonadoption in the Six County region is a lack of interest or need. We asked respondents what the main reason is that they do not have high-speed Internet, and 38.7 percent said they don't need it or are not interested in getting it. That number was lower than the state as a whole at 44 percent. The second most common reason was that high-speed Internet is not available in their area, with 29 percent of respondents giving that as the primary reason for nonadoption.

Respondents were also asked if they are interested in obtaining a faster connection, and lack of interest was expressed once again. In the Six County region, 51.6 percent of respondents said they were not interested in getting a high-speed Internet connection. That number, while still over half, is lower than the state average of 61.4 percent. We also asked respondents if they have had a high-speed connection in their home in the past five years, 74.1 percent of respondents in the region answered no. That is similar, although slightly higher, than the state average of 70.6 percent.

With these results, little can be done to increase adoption rates for broadband if lack of interest is the root of the problem. Interestingly, despite the low level of interest, nonadopters in the region said they would see benefits from access to high-speed home Internet services in terms of work productivity (45.1 percent), their children's education (32.3 percent), their own education (19.4 percent) and shopping online (41.9 percent). These benefits, however, have not translated directly into interest in obtaining access to high-speed Internet. Because increasing demand is difficult,

we turn to other reasons for nonadoption that policymakers may be able to more effectively address.

Reasons for Nonadoption: Knowledge and Expertise



When respondents were asked about their computer use and expertise, results found evidence that a lack of expertise with computers in general, and the Internet specifically, is likely playing a dominant role in nonadoption both in the Six County region and in the state.

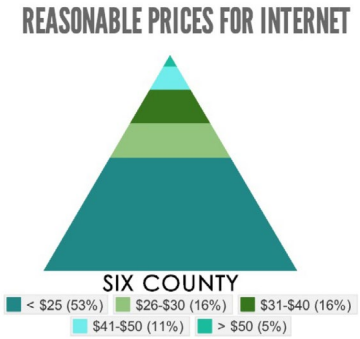
Respondents were asked to rate their computer skills on a scale of zero to 10, with zero being no computer skills and 10 being very highly skilled. In the Six County region, 25.8 percent of respondents ranked their computer skills at a zero, higher than the state average of 23.2 percent. Over 90 percent of respondents in the Six County region ranked their computer skills at a five or below. That means the majority of respondents do not feel they are highly skilled when it comes to computer use, and a substantial group of them do not feel that they have any computer skills at all. Respondents were also asked if they had participated in a class or other program to help improve their computer skills, and 83.9 percent said they had not. That number is higher than the state average of 67.6 percent. This low level of computer skills is probably contributing to nonadoption in the Six County region.

We also asked respondents what would make them more likely to adopt high-speed Internet in their homes, and 64.5 percent said training on computer and Internet use. Because the lack of skills is so prevalent in the results, this may be part of the reason for respondent's lack of interest in obtaining broadband access. Perhaps if

respondents were to gain computer skills they would feel more comfortable using the computer, and would then have a greater desire to access the Internet.

If policymakers want to increase adoption rates for broadband in the Six County region they should consider educational programs that would help nonadopters gain computer skills and learn about the benefits of Internet access.

Reasons for Nonadoption: Price



Another reason cited for nonadoption at both the state and regional level is that high-speed Internet services are too expensive. In the Six County region, 12.9 percent of respondents said the main reason they do not have high-speed Internet service at home is that it is too expensive. The region's rate of response for those who said cost was the main reason for nonadoption was higher than the state rate of 22.0 percent. Clearly, expense is playing a key role in nonadoption in the Six County region.

Respondents were asked how much high-speed Internet costs per month and their responses were clustered around the low end. Those who thought high-speed Internet costs less than $25 per month made up 35.3 percent of respondents, while 17.1 percent thought service costs $26 to $35 per month. Just over 11 percent of respondents thought that service costs between $36 and $45 per month. The response rate went down for each price point higher than that, with 23.5 percent answering that internet costs between $46 and $55, and a three-way-tie at 5.9 percent of respondents respectively believing it costs between $56 and $65 per month, between $66 and $90 per month, and over $90 per month. For comparison, a 2011 study by Ryan Yonk and Randy Simmons, at Southern Utah University and Utah State University respectively, found that broadband customers statewide were actually paying, on average, between $42 and $43 per month for high-speed Internet service.[12]

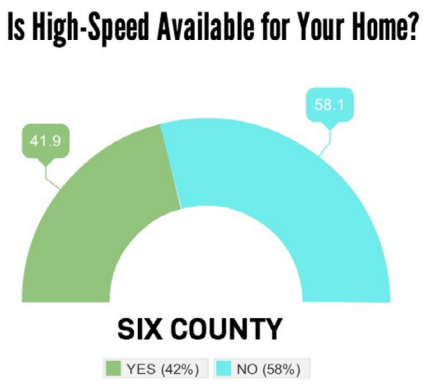
Respondents were also asked how much they believe high-speed Internet should cost, and 52.6 percent said that it should cost less than $25 per month. For comparison, in 2011, Yonk and Simmons found that rural respondents in Utah were willing to pay

an average of $33.13 per month for high-speed Internet services compared to non-rural respondents who were willing to pay $34.75.[13]

When respondents were asked what would make them more likely to have high-speed Internet in their home, 32.3 percent said lower price. This response rate is lower than those who said having high-speed Internet available, those who said having more options for coverage, and those who said training on the computer and Internet. It is higher, however, than the percentage of respondents who listed price as the main deterrent for getting in-home broadband access. This means that even for some whose main reason for not getting Internet was not price, having a lower price would encourage them to sign up for high-speed Internet.

If policymakers want to address this problem, they could consider subsidizing either the supply or the demand side of the broadband market. These subsidies would be expensive and could lead to market distortions. For these reasons, we would not recommend subsidies as a viable policy solution.

Reasons for Nonadoption: Not Available



Another reason found for nonadoption is that the technology necessary to access high-speed Internet may not be available. In the Six County region, 74.2 percent of respondents had computer equipment in their home, compared to the state average of only 66.8 percent. We also asked respondents whether high-speed Internet is available in their area, and 41.9 percent said yes. That is a lower than the state average of 57.8 percent. Most respondents have computers in their home, and also believe that high-speed Internet is available in their area.

Data for broadband availability show that actual coverage for higher speeds is varied. All six counties in the region have coverage for at least 99 percent of households at download speeds of 3 Mbps or higher. At download speeds of 10 Mbps or higher, every county but Wayne has coverage for at least 98 percent of households. Wayne has coverage for 90.2 percent of households at speeds of 10 Mbps or higher. Coverage drops significantly for higher speeds. Millard, Piute and Sanpete Counties have

similar coverage, with 48.68 of households at download speeds of 25 Mbps or higher for Milliard County, Sanpete County at 46.31 percent and Piute at 49.63 percent coverage. At that same level, Juab has coverage of 63.39 percent of households and Wayne for 60.29 percent. Sevier County has the best coverage in the region with household download speeds at 87.59 percent at 25 Mbps. The state as a whole has coverage for 92.12 percent of homes, on average, at speeds of 25 Mbps or higher. That means the Six County region is behind in terms of providing high-speed Internet coverage to its households. The reality of coverage versus the perception indicates some confusion in the region about their options. This analysis did not evaluate specific upload speeds by county, which was done in order to facilitate an enhanced evaluation of download speeds by county.

Respondents were asked what would make them more likely to adopt in-home high-speed Internet, and 35.5 percent said availability. This means some demand exists among nonadopters in the Six County region for increased coverage. To increase adoption rates, policymakers could act to incentivize increased development of broadband coverage in the Six County area. Such policies could be complemented by the creation of educational programs to increase awareness of any new broadband capacity created.

NOTES

SOUTHEASTERN ASSOCIATION OF LOCAL GOVERNMENTS REGION

THE STATE OF UTAH
BROADBAND PROJECT
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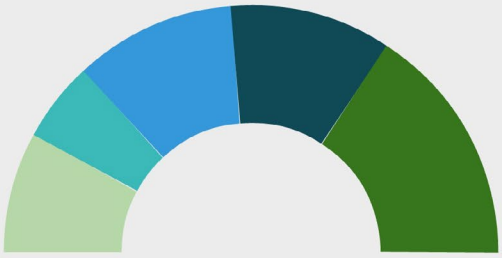
UTAH BROADBAND NONADOPTERS

The Southeastern Utah Association of Local Governments (SEUALG) region includes Carbon, Emery, Grand, and San Juan Counties, and is fairly isolated when compared to the rest of the state. The region relies on extractive and agricultural industries and is home to a substantial Native American population, with an estimated population of 56,350.

NONADOPTERS OF BROADBAND IN THE SOUTHEASTERN REGION ACCESS THE INTERNET INFREQUENTLY



- Several Times Each Day (16%)
- Once a Day (10%)
- 3-5 Days a Week (21%)
- 1-2 Days a Week (0%)
- Every Few Weeks (21%)
- Do Not Access (32%)

The average age of respondents in the region is only 49.5, compared to the state average of 56.2. Households in the region make only $31,875 annually, compared to the state average of $51,347.

KNOWLEDGE AND EXPERTISE

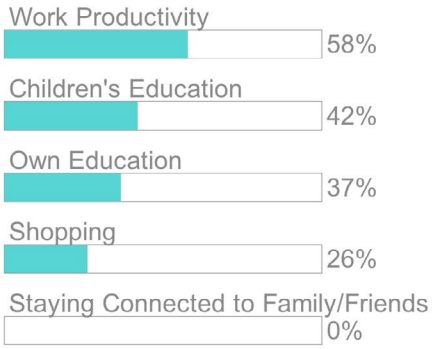
Have you participated in a class, seminar or other program to improve your computer or Internet skills?

- No (74%)
- Yes (26%)

A lack of knowledge and expertise is playing a key role in nonadoption. Over 63 percent of respondents ranked their computer skills as average or below average. When asked what would make them more likely to have high-speed Internet access in their homes, 63.1 percent answered training on computer and Internet use.

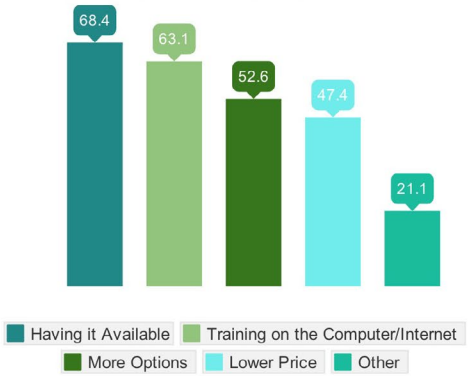
INTEREST IN HIGH-SPEED INTERNET

Over 63 percent of the region's respondents are interested in having a faster high-speed connection in their homes in the future, higher than the statewide rate. Respondents saw many benefits to obtaining in-home broadband access.



AVAILABILITY

When asked how many service providers are available in their area, 57.9 percent of respondents in the SEUALG region did not know. Actual broadband availability in the region is high, although San Juan County lags behind in terms of providing high-speed coverage to a majority of homes.

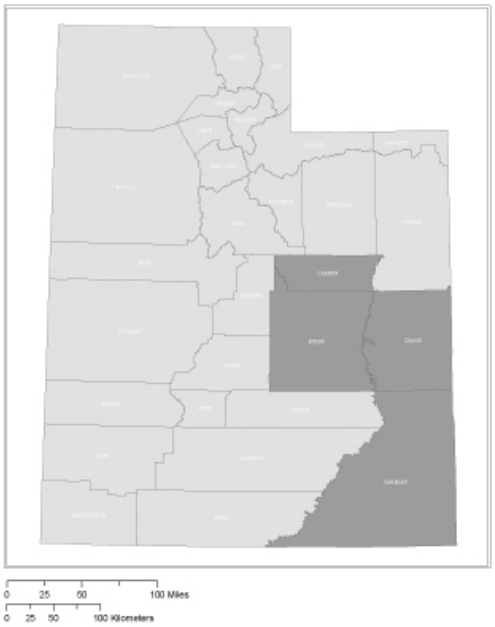


What would make you more likely to have high-speed Internet access in your home?

SOUTHEASTERN UTAH ASSOCIATION OF LOCAL GOVERNMENTS REGION

The Southeastern Utah Association of Local Governments (SEUALG) region includes Carbon, Emery, Grand and San Juan Counties, with a combined estimated population of 56,350.[5] This region covers the southeastern area of Utah. The region in general, and the Four Corners area in particular, has limited transportation options and a significantly isolated population. The SEUALG region is dominated by large-scale public land ownership, and relies primarily on extractive and agricultural industries for the bulk of the region's economic activities. The region is also home to a substantial Native American population that has a significant influence on the region's culture, history and orientation.

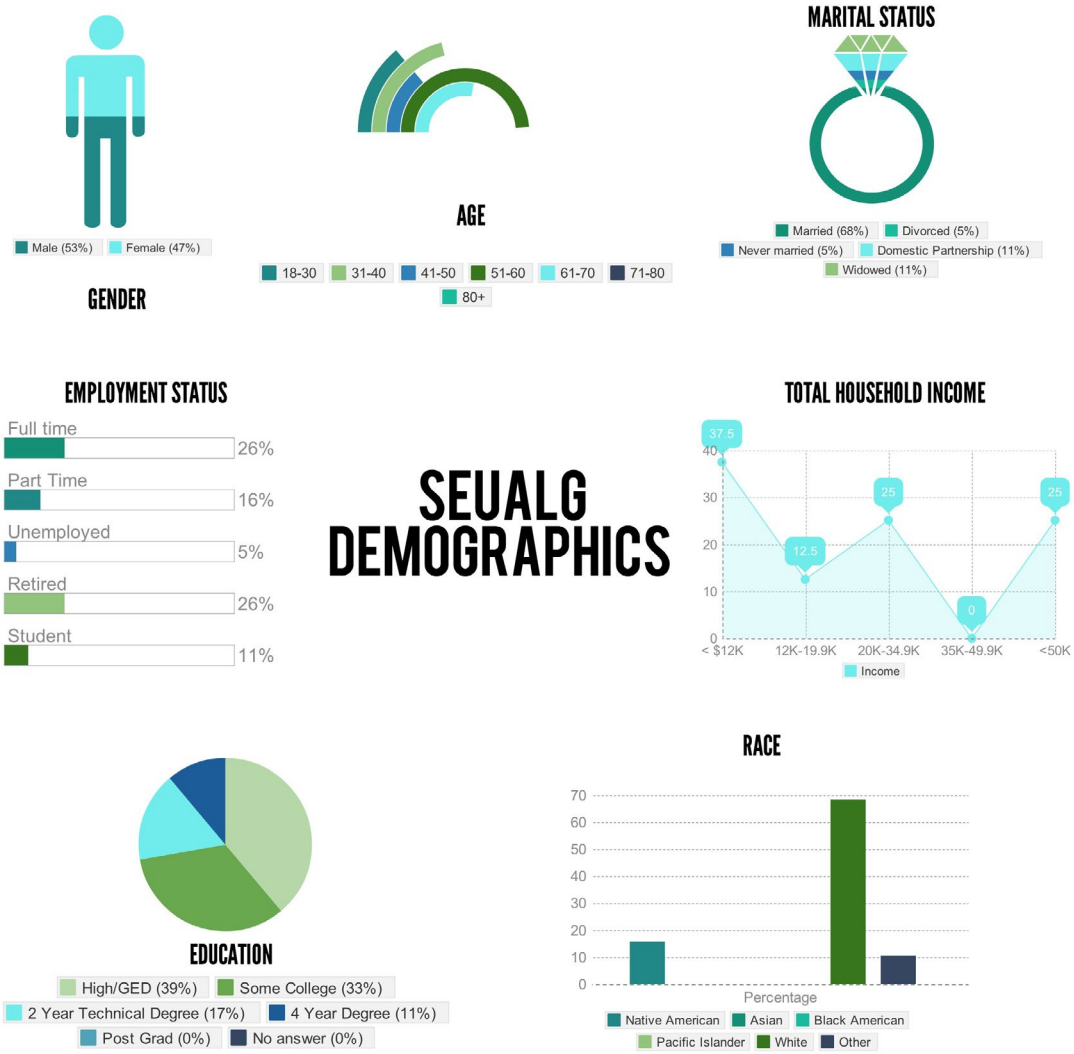
SOUTHEASTERN ASSOCIATION OF LOCAL GOVERNMENTS REGION



Demographic Picture

Respondents in the SEUALG region were similar to the state average in terms of many demographic indicators including gender, while differing significantly on other factors, including age. In the region, 52.6 percent of respondents were male, compared to the state average of 52.4 percent. The SEUALG region is much younger, on average, than the state as a whole, with a mean age of 49.5 compared to the state

average of 56.2. The age range of respondents in the SEUALG region was more densely concentrated around middle-aged people than the state average. In the region 38.9 percent of respondents were between 51 and 60 years old, while statewide only 13.49 percent of respondents fit within that range. Likewise, only 31.6 percent of respondents' households had members 46-60 years old within the SEUALG region, while statewide that number was more than twice as high, at 79 percent. The region's respondents also differed widely from the state average in terms of marital status.



Of respondents in the SEUALG region, 68.4 percent were married, compared to the state average of only 48 percent.

Total household income for respondents in the SEUALG region was much lower than the state average. Average household income in the region was only $31,875 compared to the state average of $51,347. The standard deviation for income in the region was lower than the state average, meaning that respondents' income in the SEUALG region is less varied than in the state as a whole. The SEUALG region had a much higher percentage of respondents (37.5 percent) making less than $12,000 per year than the state as a whole (13.6 percent).

In terms of employment status, a higher percentage of respondents in the SEUALG region were employed part-time (15.8 percent) than the state average of 9.2 percent. The region also had a higher percentage answer that they were students, at 10.5 percent compared to a state average of 3.8 percent. This is interesting because most students are at the younger end of the population spectrum, while most nonadopters of broadband are older. The SEUALG region had a lower percentage of retired respondents, at 26.3 percent compared to the statewide average of 42.8 percent. The region had an unemployment rate of 5.3 percent, half the state average.

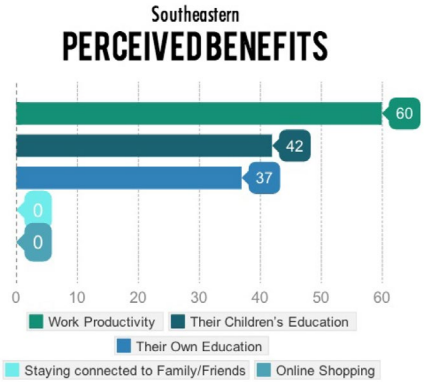
Respondents in the SEUALG region were predominately white, although at a lower rate (68.4 percent) than the state average of 80.6 percent. This can be explained by the fact that the region has a much larger population of Native Americans, making up 15.8 percent of the region's respondents compared to an overall state average of only 4.2 percent. The average level of education among nonadopters in the SEUALG region was lower than the state average. In the region, only 10.5 percent of respondents had obtained a four-year degree compared to a state average of 16.8 percent.

Low Internet Access Rates Among Nonadopters

Respondents in the SEUALG region were asked how often they access the Internet, and 31.6 percent said they never access the Internet. Just over 21 percent said they access the Internet every few weeks, with another 21 percent accessing the Internet every three to five days. About 15.8 percent of respondents said they access the Internet several times per day. Those numbers correspond with the state's overall breakdown of Internet access frequency, although the percentage of respondents in

the SEUALG region who never access the Internet is higher than the state average of 24.8 percent. Similarly, most respondents do not pay for a data plan on their cell phone. Clearly, the frequency of Internet access among nonadopters is low, although it is not clear whether that is due to lack of interest or desire to access the Internet, limited computer skills, the high cost of Internet access or limited access to technology. All of these are likely playing a role, although probably not with equal influence. We examine the role each of these reasons below.

Reasons for Nonadoption: Lack of Interest or Need



One of the reasons for nonadoption both at the state level and in the SEUALG region was a lack of interest or need, although other factors are also contributing to nonadoption. The majority of nonadopters in the SEUALG region, 68.4 percent, said high-speed Internet was available. Of the region's respondents, 31.6 percent said that the key reason they do not have high-speed Internet at home is because they do not need it or are not interested. That number is lower than the state average of 44 percent.

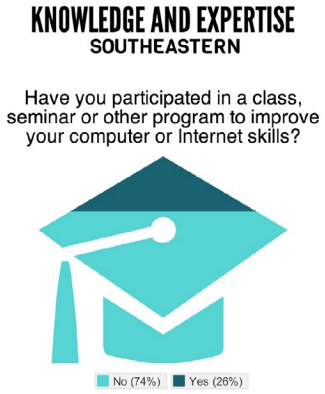
Respondents were also asked if they would like to have a faster high-speed connection in the future and 63.2 percent said that they would. This means the majority of nonadopters in the SEUALG region do have an interest in getting faster high-speed Internet, and that lack of interest may not be the key reason for nonadoption in this area. At the state level, 60 percent of respondents were not interested in obtaining a faster connection. This means that interest in high-speed Internet may actually be higher in the SEUALG region than in the rest of the state.

Finally, respondents were asked if they would see any benefit to different areas of their life if they had Internet access at home. Nearly 60 percent said they would see increases in work productivity, just over 42 percent said they would see benefits to

their children's education, and nearly 37 percent said their own education would benefit.

Interest in obtaining high-speed Internet access in the SEUALG region is clearly higher than in other regions of the state, and higher than the state average. This is encouraging news for policymakers who seek to increase broadband adoption, because demand already exists. The following sections will explore other reasons for nonadoption, along with policy implications for each.

Reasons for Nonadoption: Knowledge and Expertise



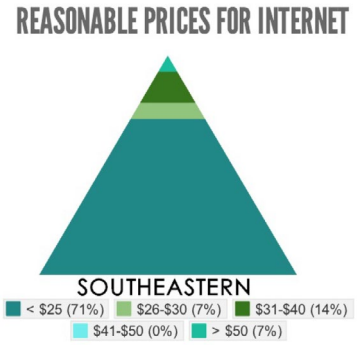
When respondents were asked about their computer use and expertise, results found evidence that a lack of expertise about computers in general, and the Internet specifically, is likely playing a key role in nonadoption both in the SEUALG region and in the state.

Over 84 percent of respondents said that they have computer equipment in the home. Respondents were asked to rank their computer skills on a scale from zero to 10, with zero being no computer skills and 10 being very highly skilled. In the SEUALG region, 63.1 percent of respondents ranked themselves at a five or lower. This means that over half of the sample believes their computer skills are average or below average.

Respondents were also asked if they had participated in a class, seminar or other program to improve their computer skills and 73.7 percent said they had not. When asked what would make them more likely to have high-speed Internet access in their homes, 63.1 percent answered training on computer and Internet use. These results indicate that providing training and educational programs geared toward increasing

computer literacy and Internet skills may be one of the most effective ways to increase adoption rates for broadband.

Reasons for Nonadoption: Price



Another key reason cited for nonadoption at both the state and regional level is that high-speed Internet services are too expensive. About 31.6 percent of respondents listed high cost as the main reason why they do not have high-speed Internet access at home. That number is higher than the state average of 22 percent. High cost was tied with lack of interest as the top two reasons for non-adoption in the region. This shows that the price of broadband in the SEUALG region is a key reason for nonadoption, although the region's low income may also be impacting respondents' answers.

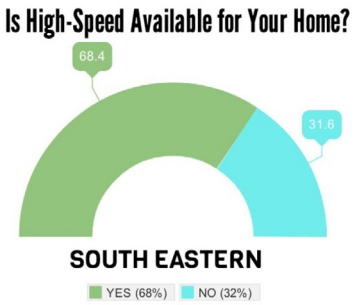
Respondents were asked how much high-speed Internet costs, and their responses were widely distributed: 16.7 percent said service costs less than $25 per month, 24.9 percent said between $26 and $35, and 25 percent said between $36 and $45 per month. A 2011 study by Ryan Yonk and Randy Simmons, at Southern Utah University and Utah State University respectively, found that broadband customers statewide were actually paying, on average, between $42 and $43 per month for high-speed Internet service.[6]

When asked how much high-speed Internet should cost, 71.4 percent of respondents in the SEUALG region said high-speed Internet should cost less than $25 per month. This rate of response is even higher than the statewide response in which almost half of respondents said high-speed Internet should cost less than $25 per month. Nonadopters in the SEUALG region clearly have a lower tolerance for high prices for broadband. For comparison, in 2011, Yonk and Simmons found that rural respondents in Utah were willing to pay an average of $33.13 per month for high-speed Internet services compared to non-rural respondents who were willing to pay $34.75.[7]

Over 47 percent of respondents in the SEUALG region said that if high-speed Internet were to cost less, they would be more likely to get access in their homes.

Nonadopters in the region may simply not be willing to pay the current prices of high-speed Internet services. Although it would not be recommended, subsidizing either the supply or the demand side of the high-speed Internet market may be one way to achieve this.

Reasons for Nonadoption: Not Available



Another reason found for nonadoption is the technology necessary to access high-speed Internet may not be available. Respondents in the SEUALG region were asked whether they have computer equipment in their homes and over 84 percent said they do. Statewide, only 66.8 percent of respondents had in home computers. Because the SEUALG region has a lower household income than much of the state, it is surprising that the area has a higher rate of in-home computers than the state average. The high rate of in-home computers in the region means that availability of hardware is most likely not a key reason for nonadoption.

In examining reasons for nonadoption, respondents seem to suffer from a lack of knowledge. When asked how many service providers are available in their area, 57.9 percent of respondents in the SEUALG region did not know. This means there may be providers of Internet available that respondents simply don't know about. When asked what would make them more likely to high-speed Internet, 68.4 percent said having it available in their area. Clearly, there is a perception of limited availability.

Data for broadband availability show that Carbon, Emery and Grand Counties all have broadband available to at least 88 percent of households at download speeds of at least 25 Mbps. San Juan County has lower levels of availability, as over 99 percent of households have broadband available at download speeds of at least 3 Mbps, but only 1.64 percent of households have access to download speeds of at least 25 Mbps. This data shows that broadband availability in the region is varied. While most of the counties in the SEUALG region have high-speed Internet available to a majority of their households, San Juan Country lags behind. This analysis also did not evaluate

specific upload speeds by county, which was done in order to facilitate an enhanced evaluation of download speeds by county.

As far as availability goes, policymakers could help solve the knowledge problem by educating people about the high-speed Internet options available in their area. As for the lack of broadband availability in San Juan County, policymakers may want to explore possible methods for incentivizing the development of more extensive coverage in this remote corner of the state.

NOTES

FIVE COUNTY ASSOCIATION OF GOVERNMENTS REGION

THE STATE OF UTAH
BROADBAND PROJECT
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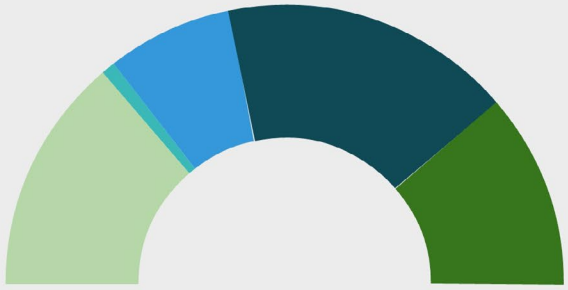
UTAH BROADBAND NONADOPTERS

The Five County Association of Governments region, which includes Beaver, Iron, Garfield, Washington and Kane Counties, is located in the southwest corner of the state with a population of 203,204 The bulk of the population is located in and around the Iron and Washington County areas including St. George and Cedar City.



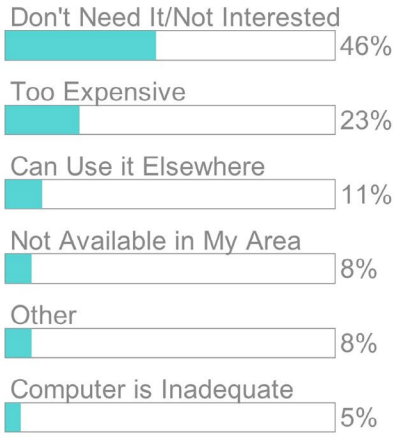
Several Times Each Day (27%) | Once a Day (2%)
3-5 Days a Week (15%) | 1-2 Days a Week (0%)
Every Few Weeks (34%) | Do Not Access (23%)

NONADOPTERS OF BROADBAND IN THE FIVE COUNTY REGION ACCESS THE INTERNET INFREQUENTLY

The average age of respondents in the region is 58.5 years, slightly older than the state average of 56.2. The region had a higher rate of retired respondents (48.4 percent) compared to the state average of 42.8 percent. Respondents in the Five County region make, on average, $36,343 per year in total household income, which is much lower than the state average of $51,347.

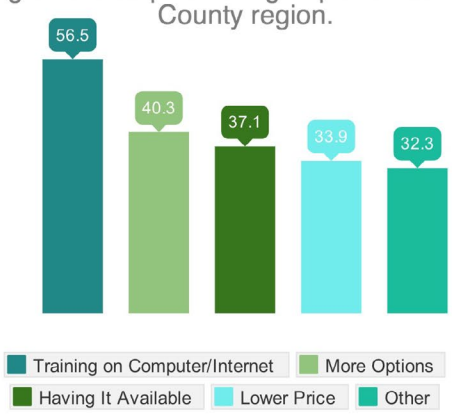
LACK OF INTEREST OR NEED

The key reason for nonadoption in the Five County region was a lack of interest or need. In the region, 45.8 percent of respondents said they did not need high-speed Internet or were not interested in getting it.



KNOWLEDGE AND EXPERTISE

A large majority of nonadopters in the Five County region believe they are not highly skilled in terms of computer and Internet use. This lack of skills or lack of perceived skills is most likely contributing to nonadoption of high-speed Internet in the Five County region.



What would make you more likely to have high-speed Internet access in your home?

THE FIVE COUNTY ASSOCIATION OF GOVERNMENTS REGION

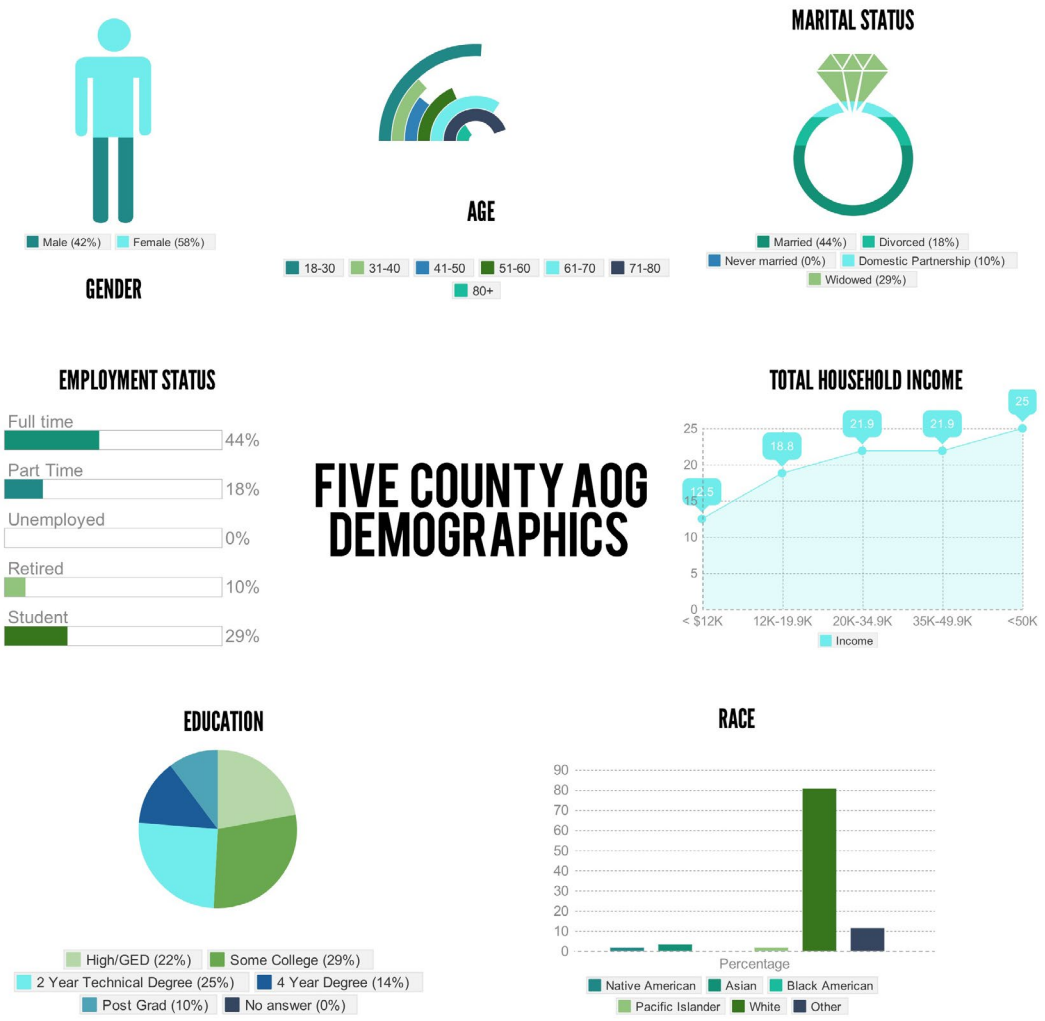
The Five County Association of Governments region is located in the southwest corner of the state and includes Beaver, Iron, Garfield, Washington and Kane Counties with a combined estimated population of 203,204.[6] This region is dominated by public lands issues, with the bulk of the population located in and around the Iron and Washington County areas. St. George and Cedar City are the largest municipalities in the region and have traditionally been the region's dominate areas. However, increased growth in the more rural areas has substantially increased the visibility and influence of those areas.

FIVE COUNY ASSOCIATION OF GOVERNMENTS REGION

Demographic Picture

The Five County region's nonadopters were similar to the state average in terms of most demographic information. A higher proportion of the region's respondents were female (58.1 percent) than the state average of only 47.6 percent. Respondents in the Five County region were also slightly older, with an average age of 58.5 compared to the state average of 56.2 years. Both the region and the state as a whole saw a wide distribution of age for respondents. Most of the region's nonadopters

were either married (43.6 percent) or widowed (29 percent) which makes sense due to the region's older population.



Many older people move to St. George and the surrounding communities to retire. The data support this, as 48.4 percent of respondents in the region were retired, higher than the state average of 42.8 percent. The region's unemployment rate among respondents was similar to the state average of nearly 10 percent at the time the survey was completed. Respondents in the Five County region make, on average, $36,343 per year in total household income, which is much lower than the state average of $51,347.

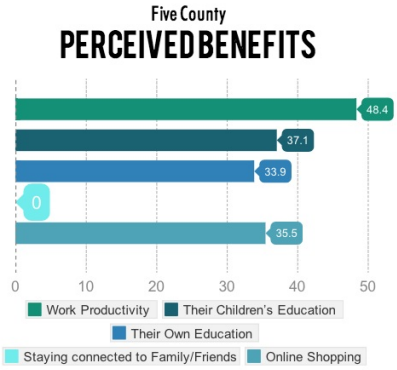
About 80 percent of the region's respondents were white, which corresponds closely with the state average. In terms of education, the Five County region's nonadopters

had fewer bachelor's degrees than the state average. Almost 13 percent of respondents in the region had completed a four-year degree, compared to the state average of 16.8 percent. The region's respondents, however, had a higher rate of completing two-year tech degrees (24.2 percent), and some college (27.4 percent) than the state average for those levels of education.

Low Internet Access Rates Among Nonadopters

Respondents were asked how often they access the Internet, and 22.6 percent said they never get online. Nearly 40 percent said they access the Internet once every few weeks, and 14.5 percent said they access it three to five days a week. Those numbers are similar to the state breakdown for Internet access. This means a large segment of nonadopters are not regularly getting online. Despite these numbers, the region has a higher than average percentage of nonadopters who get online several times a day, 27.4 percent compared to just 14.8 percent statewide. In seeking to understand why people in the Five County region do not get online or do not use the Internet more frequently, it is not clear whether that is due to lack of interest or desire to access the Internet, limited computer skills, the high cost of Internet access or limited access to technology. All of these are likely playing a role, although probably not with equal influence. We examine the role of each of them below.

Reasons for Nonadoption: Lack of Interest or Need



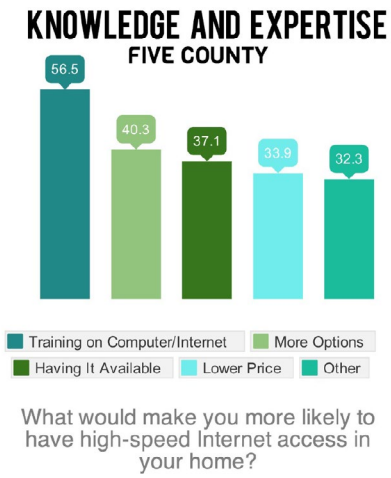
The key reason found for nonadoption at both the state level and in the Five County region was a lack of interest or need. Although other factors are also contributing to nonadoption, this was found to be the strongest influence for nonadopters. When asked what the main reason is for nonadoption, 45.8 percent of respondents in the Five County region said that they don't need high-speed Internet or are not interested in getting it. That is similar, but slightly higher than the state average of 44 percent.

Respondents were also asked if they are interested in obtaining a faster connection, and lack of interest was expressed once again. Of the region's respondents, 67.7 percent said they were not interested in obtaining a faster connection. That number

was similar, although higher, than the state average of 61.4 percent. This means well over half of respondents both at the regional and state level are not interested in obtaining high-speed Internet.

With these results, little can be done to increase adoption rates for broadband if lack of interest is the root of the problem. Interestingly, despite the low level of interest, nonadopters in the region said they would see benefits from access to high-speed home Internet service in terms of work productivity (48.4 percent), children's education (37.1 percent), their own education (33.9 percent) and online shopping (35.5 percent). These perceived benefits, however, have not translated into interest in obtaining access to high-speed Internet. Because increasing demand is difficult, we turn to other reasons for nonadoption that policymakers may be able to more effectively address.

Reasons for Nonadoption: Knowledge and Expertise



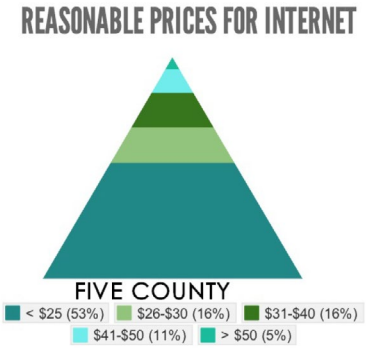
When respondents were asked about their computer use and expertise, results found evidence that a lack of expertise about computers in general, and the Internet specifically, is likely playing a key role in nonadoption both in the Five County region and in the state as a whole.

Respondents were asked to rate their computer skills on a scale of zero to 10, with zero being no computer skills and 10 being very highly skilled. Over 67 percent of respondents in the region ranked their computer skills at a five or below. That means a large majority of the nonadopters in the Five County region believe they are not highly skilled. This lack of skills or lack of perceived skills is most likely contributing to nonadoption of high-speed Internet in the Five County region.

When respondents were asked what would make them more likely to have high-speed Internet in their homes, 56.5 percent of respondents in the region said training on computer and Internet use. These results indicate that providing training and

educational programs geared toward increasing computer literacy and Internet skills may be one of the most effective ways to increase adoption rates for broadband.

Reasons for Nonadoption: Price



Another key reason cited for nonadoption at both the state and regional level is that high-speed Internet services are too expensive. When asked what is the main reason they do not have broadband in their homes, 22.6 percent of respondents in the Five County region said that it is too expensive. That number is similar to the state average.

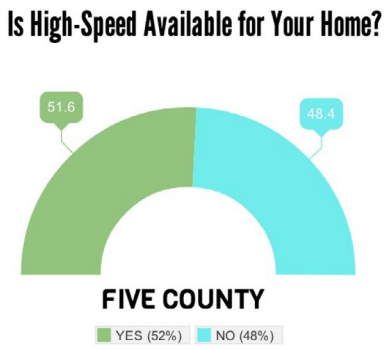
Respondents were asked how much high-speed Internet costs, and their responses were widely distributed: 27.6 percent said under $25 per month, 10.3 percent said between $26 and $35 per month, 17.2 percent said between $36 and $45. Only 10.5 percent believed high-speed Internet costs over $90 per month. A 2011 study by Ryan Yonk and Randy Simmons, at Southern Utah University and Utah State University respectively, found that broadband customers statewide were actually paying, on average, between $42 and $43 per month for high-speed Internet service.[7]

Respondents were also asked what a reasonable monthly price for high-speed Internet would be, and over half said less than $25 per month. That number is similar to the state average. Yonk and Simmons also found that rural respondents in Utah were willing to pay an average of $33.13 per month for high-speed Internet services compared to non-rural respondents who were willing to pay $34.75.[8] Although that result was not statistically significant, the results of this study show that nonadopters of broadband think that high-speed Internet services are too expensive.

When respondents were asked what would make them more likely to have high-speed Internet in their homes, 33.9 percent said a lower price for services. Reducing the cost of high-speed Internet services may be necessary to increase adoption rates.

Although it would not be recommended, subsidizing either the supply or the demand side of the high-speed Internet market may be one way to achieve this.

Reasons for Nonadoption: Not Available



Another reason found for nonadoption is that the technology necessary to access high-speed Internet may not be available. Respondents were asked whether they have computer equipment in their homes. Just over 29 percent of respondents reported that they had computer equipment in their homes, while 30.7 reported that they did not. The remaining 40 percent did not respond. Statewide, over two-thirds of respondents had a computer in their home. It is not surprising that the Five County region would have a lower rate of home computers because of the comparatively lower incomes and older population of the region's respondents. The relatively low rate of computers in homes is likely contributing to nonadoption since computers are the most common type of hardware used to access high-speed Internet.

In examining reasons for nonadoption, respondents seem to suffer from a lack of knowledge. The Five County region had 48.4 percent of respondents answer that high-speed Internet is not available in their area. This information is most likely inaccurate, however, because about 85 percent of respondents in both the region and the state did not know how many providers were available in their area. This means there may be providers of high-speed Internet available that respondents simply did not know about. Clearly, there is a perception of limited availability.

Data for broadband availability show that all five counties included in the region (Beaver, Iron, Garfield, Washington and Kane) have broadband coverage at download speeds of 10 Mbps or higher for 92 percent or more of households. Coverage is much more variable at download speeds of 25 Mbps or greater: Iron and Washington Counties have 98 percent of household coverage at this download speed, while Kane has coverage for 60 percent of households and Beaver for 63 percent at this download speed. Garfield County has only 46.67 percent of household coverage at 25 Mbps. This analysis did not evaluate specific upload speeds by county, which was done in

order to facilitate an enhanced evaluation of download speeds by county and shows that broadband availability in the region is varied.

As far as availability goes, policymakers could help solve the knowledge problem by educating people about the high-speed Internet options available in their area. As for the lack computers in the home, this is a more difficult policy question to solve because it is not clear if people are not purchasing computers because they cannot afford them, because they don't know how to use them, or because they are simply not interested in using them. As for the lack of broadband coverage, Kane, Garfield, Beaver and Iron Counties could consider policies that would promote increased broadband coverage.

ENDNOTES

1 The six regions and counties within each region are as follows: 1. Five County Region- Beaver, Iron, Garfield, Washington and Kane Counties 2. Six Coun- ty Region- Juab, Millard, Piute, Sanpete, Sevier, and Wayne Counties 3. Wasatch Front Region- Weber, Morgan, Davis, Tooele, and Salt Lake Counties 4. Bear River Region- Cache, Box Elder, and Rich Counties 5. Mountainland Region- Summit, Wasatch, and Utah Counties 6. Uintah Basin Region- Duchesne, Daggett, and Uin- tah Counties

2 The seven regions and counties within each region are as follows: 1. Bear River Region- Cache, Box Elder, and Rich Counties 2. Wasatch Region- Weber, Morgan, Davis, Tooele, and Salt Lake Counties 3. Mountainland Region- Summit, Wasatch, and Utah Counties 4. Uintah Basin Region- Duchesne, Daggett, and Uintah Counties 5. Six County Region- Juab, Millard, Piute, Sanpete, Sevier, and Wayne Counties 6. Five County Region- Beaver, Iron, Garfield, Washington and Kane Counties 7. Southeastern Region- Grand, San Juan, Carbon, and Emery Counties

3 The seven regions and counties within each region are as follows: 1. Bear River Region- Cache, Box Elder, and Rich Counties 2. Wasatch Region- Weber, Morgan, Davis, Tooele, and Salt Lake Counties 3. Mountainland Region- Summit, Wasatch, and Utah Counties 4. Uintah Basin Region- Duchesne, Daggett, and Uintah Counties 5. Six County Region- Juab, Millard, Piute, Sanpete, Sevier, and Wayne Counties 6. Five County Region- Beaver, Iron, Garfield, Washington

and Kane Counties 7. Southeastern Region- Grand, San Juan, Carbon, and Emery Counties

4 According to the 2010 US Census.

5 According to the 2010 US Census.

6 According to the 2010 US Census

7 According to the 2010 US Census

8 According to the 2010 US Census

9 According to the 2010 US Census

10 According to the 2010 US Census

11 According to the 2010 US Census.

12 Yonk, Ryan and Simmons, Randy T. Utah Broadband Access. P. 24. Retrieved from: http://broadband.utah.gov/wp-content/uploads/

sites/2/2013/05/Utah-Broadband-Access-Submitted-Report-Final.pdf

13 Yonk and Simmons, et al.

14 Yonk, Ryan and Simmons, Randy T. Utah Broadband Access. Retrieved

from: http://broadband.utah.gov/wp-content/uploads/sites/2/2013/05/

Utah-Broadband-Access-Submitted-Report-Final.pdf

15 The Full Survey can be viewed in Sample Survey One of this report.

SAMPLE SURVEY

	ASSOCIATION OF GOVERNMENTS							
	Statewide	**Bear River**	**Wasatch**	**Mountainland**	**Uintah**	**Six County**	**SEUALG**	**Five County**
Demographics								
Male	52.40%	50.00%	47.30%	50.60%	47.10%	48.40%	52.60%	41.90%
Female	47.60%	50.00%	52.70%	49.40%	52.90%	51.60%	47.40%	58.10%
Age Range								
18-30	16.50%	18.80%	15.25%	28.80%	0.00%	6.70%	11.10%	16.10%
31-40	12.40%	31.20%	11.90%	9.60%	6.25%	13.30%	16.70%	8.10%
41-50	9.85%	6.30%	10.20%	9.70%	25.00%	10.00%	11.10%	6.50%
51-60	13.49%	3.00%	13.10%	9.60%	6.25%	30.00%	38.90%	11.30%
61-70	16.49%	15.60%	14.80%	17.80%	25.00%	10.00%	22.20%	21.00%
71-80	17.89%	9.40%	18.70%	15.10%	31.25%	13.30%	0.00%	27.40%
80+	13.28%	15.60%	16.10%	9.60%	6.25%	16.70%	0.00%	9.70%
Home Age Range								
Under 14	22.50%							
14-18	52.60%							
Under 18		11.90%	12.90%	13.90%	11.80%	12.90%	11.10%	14.50%
19-30	42.30%	43.75%	30.90%	11.50%	29.60%	15.80%	36.80%	24.20%
31-45	55.00%	18.20%	37.10%	17.80%	29.60%	29.70%	63.20%	29.00%
46-60	79.00%	37.50%	57.20%	49.40%	70.60%	48.50%	31.60%	58.10%
Marital Status								
Married	48.00%	46.90%	46.90%	46.80%	35.30%	64.50%	68.40%	43.60%
Divorced	11.80%	20.71%	20.80%	26.60%	11.80%	3.20%	5.30%	17.70%
Never married	19.50%	0.00%	0.00%	1.30%	0.00%	3.20%	5.30%	0.00%
Domestic Partnership	1.40%	12.50%	12.30%	12.70%	17.70%	6.50%	10.50%	9.70%
Widowed	17.60%	12.50%	16.50%	12.70%	35.30%	16.10%	10.50%	29.00%
Total Household Income								
< $12K	13.60%	9.09%	11.00%	6.40%	25.00%	10.70%	37.50%	12.50%
12K-19.9K	13.90%	18.18%	10.30%	10.60%	8.30%	10.70%	12.50%	18.80%
20K-34.9K	19.90%	9.09%	17.10%	25.50%	33.30%	14.30%	25.00%	21.90%
35K-49.9K	18.20%	18.18%	20.70%	19.20%	0.00%	25.00%	0.00%	21.90%
<50K	37.40%	45.50%	40.90%	38.30%	33.30%	39.30%	25.00%	25.00%
Employment								
Full time	30.40%	43.80%	30.40%	32.90%	29.40%	20.00%	26.30%	22.60%
Part Time	9.20%	9.40%	8.50%	11.40%	5.90%	16.50%	15.80%	9.70%
Unemployed	10.60%	6.30%	10.80%	10.10%	5.91%	22.60%	5.30%	9.70%
Retired	42.80%	28.10%	45.00%	38.00%	52.90%	41.00%	26.30%	48.40%
Student	3.80%	9.40%	2.70%	5.10%	5.90%	0.00%	10.50%	4.80%

	Statewide	Bear River	Wasatch	Mountainland	Uintah	Six County	SEUALG	Five County
Race								
Native American	4.20%	3.10%	4.20%	1.30%	5.90%	9.70%	15.80%	1.60%
Asian	1.40%	0.00%	1.90%	0.00%	0.00%	0.00%	0.00%	3.20%
Black American	1.40%	3.10%	2.30%	0.00%	0.00%	0.00%	0.00%	0.00%
Pacific Islander	0.10%	3.10%	80.00%	0.00%	0.00%	0.00%	0.00%	1.60%
White	80.60%	81.30%	77.70%	89.90%	88.30%	83.90%	68.40%	80.70%
Other	9.20%	9.40%	9.60%	7.60%	5.90%	6.50%	10.50%	11.30%
Education								
Some High School	4.20%	0.00%	5.00%	3.80%	5.90%	3.20%	5.30%	3.20%
High/GED	28.00%	18.80%	31.10%	22.80%	29.40%	32.30%	36.80%	21.00%
Some College	22.00%	15.60%	18.10%	29.10%	23.50%	25.80%	31.6	27.40%
2 Year Technical Degree	15.80%	21.90%	13.50%	13.90%	11.80%	19.40%	15.80%	24.20%
4 Year Degree	16.80%	21.90%	17.70%	19.00%	17.70%	9.70%	10.50%	12.90%
Post Grad	12.20%	21.90%	31.10%	11.40%	11.80%	9.70%	0.00%	9.70%
No answer	12.20%							
Reasons for Non Adoption								
Is High Speed Internet Available for Your Home?								
Yes	57.80%	68.80%	59.60%	62.00%	29.40%	41.90%	68.40%	51.60%
No	42.20%	31.30%	40.40%	38.00%	70.60%	58.10%	31.60%	48.40%
What is the Main Reason you do not have High-Speed Internet Access at Home?								
Not Interested	44.00%	46.90%	48.10%	32.90%	47.00%	38.70%	31.60%	45.80%
Too Expensive	22.00%	25.00%	21.20%	26.60%	11.80%	12.90%	31.60%	22.60%
Can Use it Elsewhere	7.40%	12.50%	6.20%	8.90%	5.90%	6.50%	0.00%	11.30%
Not Available	11.80%	12.40%	6.20%	17.70%	23.50%	29.00%	26.30%	8.10%
Computer is Inadequate	7.80%	0.00%	9.20%	8.90%	0.00%	9.70%	0.00%	8.10%
Other	7.00%	3.10%	9.20%	5.10%	11.80%	3.20%	10.50%	4.80%
Do You Know how Many Providers of High-Speed Internet are in Your Area?								
Yes	15.20%	18.80%	14.20%	13.90%	5.90%	12.90%	42.10%	14.50%
No	84.80%	81.20%	85.80%	86.10%	94.10%	87.10%	57.90%	85.50%
Would you like to have a fast(er) High-Speed Connection Now or Sometime in the Future?								
Yes	38.60%	34.40%	32.30%	13.90%	29.40%	48.40%	63.20%	32.30%
No	61.40%	65.60%	67.30%	86.10%	70.60%	51.60%	36.80%	67.70%
In the Past 5 Years Have you Had a High-Speed Connection in your Home?								
Yes	29.40%	25.00%	28.10%	58.20%	5.90%	25.80%	15.80%	41.90%
No	70.60%	75.00%	72.90%	41.80%	94.10%	74.10%	84.20%	58.10%

	Statewide	Bear River	Wasatch	Mountainland	Uintah	Six County	SEUALG	Five County
What is the Main Reason you Cancelled Your High-Speed (Faster Than Dial-up) Internet Access at Home?								
Not Interested	27.90%	37.50%	30.50%	32.10%	0.00%	25.00%	33.30%	15.40%
Too Expensive	27.20%	25.00%	28.80%	35.70%	0.00%	12.50%	0.00%	23.10%
Can Use it Elsewhere	10.90%	12.50%	9.60%	7.10%	0.00%	25.00%	0.00%	15.40%
Not Available	12.50%	12.50%	11.00%	10.70%	100.00 %	25.00%	66.70%	7.70%
Computer is Inadequate	9.50%	12.50%	8.20%	3.60%	0.00%	12.50%	0.00%	19.20%
Other	12.20%	12.50%	12.30%	10.70%	0.00%	0.00%	0.00%	19.20%
To the Nearest Dollar, How Much Per Month does High-Speed Internet Service Cost?								
< $25.00	19.30%	6.25%	15.70%	14.60%	3.33%	35.30%	16.70%	27.60%
$26.00-$35.00	12.60%	31.25%	10.80%	17.10%	0.00%	17.10%	24.90%	10.30%
$36.00-$45.00	16.30%	12.50%	17.40%	14.60%	0.00%	11.80%	25.00%	17.20%
$46.00-$55.00	18.80%	25.00%	17.40%	26.80%	33.33%	23.50%	16.70%	6.90%
$56.00-$65.00	8.00%	6.25%	7.40%	9.80%	0.00%	5.90%	8.30%	10.30%
$66.00-$90.00	10.90%	6.25%	11.60%	7.30%	33.33%	5.90%	8.30%	16.20%
>$90.00	14.23%	12.50%	19.80%	9.80%	0.00%	5.90%	0.00%	10.50%
What do you Think a Reasonable Price for High-Speed Internet Would Be?								
< $25.00	49.30%	36.90%	37.20%	45.30%	50.00%	52.60%	71.40%	52.90%
$26.00-$30.00	17.50%	26.30%	28.20%	7.60%	0.00%	15.80%	7.10%	14.70%
$31.00-$40.00	12.00%	15.80%	9.70%	20.80%	25.00%	15.80%	14.30%	8.90%
$41.00-$50.00	12.64%	15.80%	15.20%	7.60%	0.00%	10.50%	0.00%	17.70%
>$50.00	8.56%	5.30%	9.60%	18.90%	25.00%	5.30%	7.10%	5.90%
Do you have Computer Equipment in the Home?								
Yes	66.80%	100.00%	42.70%	69.60%	64.60%	74.20%	84.20%	29.30%
No	33.20%	0.00%	37.30%	30.40%	35.40%	25.80%	15.80%	30.70%
Using a scale from 0 to 10 and Thinking About Your Personal Experience, How Would you Describe Your Computer Skills? 0 Being I Have No Computer Skills and 10 Being I Am Very Highly Skilled.								
0	23.20%	25.00%	23.10%	20.25%	41.20%	25.80%	31.60%	17.70%
1	4.40%	9.40%	3.50%	3.80%	5.90%	6.50%	0.00%	6.50%
2	6.00%	0.00%	8.50%	2.50%	0.00%	6.50%	10.50%	3.20%
3	6.20%	6.30%	4.60%	8.90%	0.00%	12.90%	0.00%	9.70%
4	9.00%	6.30%	6.90%	13.90%	17.70%	22.60%	10.50%	3.20%
5	16.20%	6.30%	16.90%	11.40%	11.80%	16.10%	10.50%	27.40%
6	8.20%	15.60%	8.50%	6.30%	5.90%	0.00%	15.80%	8.10%
7	10.00%	9.40%	10.80%	11.40%	5.90%	6.50%	5.30%	9.70%
8	9.80%	3.10%	10.40%	13.90%	0.00%	3.20%	15.80%	9.70%
9	2.20%	6.30%	1.90%	3.80%	5.90%	0.00%	0.00%	0.00%
10	4.80%	12.50%	5.00%	3.80%	5.90%	0.00%	3.80%	4.80%

	Statewide	Bear River	Wasatch	Mountainland	Uintah	Six County	SEUALG	Five County
Again, Thinking About Your Personal Experience Have you Participated in a Class, Seminar or Other Program to Improve Your Computer or Internet Skills?								
Yes	32.40%	40.60%	32.70%	32.90%	23.50%	16.10%	26.30%	38.70%
No	67.60%	59.40%	67.30%	67.10%	76.50%	83.90%	73.70%	61.30%
Do you or Any Member of Your Household Access the Internet at Any of the Following Locations Outside the Home?								
Work	41.20%	53.10%	57.30%	43.00%	23.50%	41.90%	21.10%	37.10%
School	28.40%	50.00%	23.90%	34.20%	11.80%	29.00%	31.60%	32.30%
Public Library	20.60%							
Community Center	9.00%	9.40%	10.00%	10.10%	0.00%	0.00%	15.80%	8.10%
Friends/Neighbors	37.40%	59.40%	36.20%	45.60%	11.80%	32.20%	36.80%	30.70%
Internet café	14.20%	25.00%	13.90%	17.70%	0.00%	3.20%	15.80%	14.50%
Other access	5.80%	6.25%	4.60%	10.10%	0.00%	3.20%	105.00%	6.50%
No outside Access		21.90%	33.50%	26.60%	64.70%	32.30%	31.60%	35.50%
About How Often do you Access the Internet?								
Several times	14.80%	0.00%	11.50%	19.00%	11.80%	12.90%	15.80%	27.40%
Once a day	8.40%	9.40%	9.60%	8.90%	11.80%	9.70%	10.50%	1.60%
3-5 days /Week	22.40%	6.25%	25.00%	20.25%	17.70%	32.30%	21.10%	14.50%
1-2 days/Week	0.00%	15.60%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Every few Week	29.60%	46.90%	27.30%	31.70%	17.70%	29.00%	21.10%	33.90%
Do not access	24.80%	21.90%	26.50%	26.60%	41.20%	16.10%	31.60%	22.60%
Do you Pay for a Data Plan on Your Cell Phone?								
Yes	34.80%	37.50%	32.70%	40.50%	23.50%	40.50%	31.60%	45.20%
No	65.20%	62.50%	67.30%	59.50%	76.50%	59.50%	68.40%	54.80%
Thinking About Home High-Speed Internet Service, do you See Any Benefit to the Following if you Had Access at Home?								
Work Pro	49.40%	53.10%	46.50%	57.00%	52.90%	45.10%	57.90%	48.40%
Children's Education	51.00%	37.50%	55.40%	67.10%	39.40%	32.30%	42.10%	37.10%
Own Education	29.20%	18.80%	28.50%	36.70%	17.70%	19.40%	36.80%	33.90%
Social Media	4.20%	0.00%	4.60%	7.60%	0.00%	0.00%	0.00%	4.80%
Shopping	32.40%	37.50%	34.20%	17.70%	41.20%	41.90%	26.30%	35.50%
What Would Make you More Likely to Have High-Speed Internet Access in Your Home?								
Lower Price	32.00%	34.40%	28.80%	41.80%	17.70%	32.30%	47.40%	33.90%
Having it Available	38.20%	34.40%	33.50%	51.90%	17.70%	35.50%	68.40%	40.30%
More Options	43.80%	34.40%	41.90%	57.00%	23.50%	54.80%	52.60%	37.10%
Trainings on Computer	53.00%	43.75%	34.60%	63.30%	35.30%	64.50%	63.10%	56.50%
Other	32.20%	46.90%	34.60%	19.00%	59.90%	22.50%	21.10%	32.30%

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