

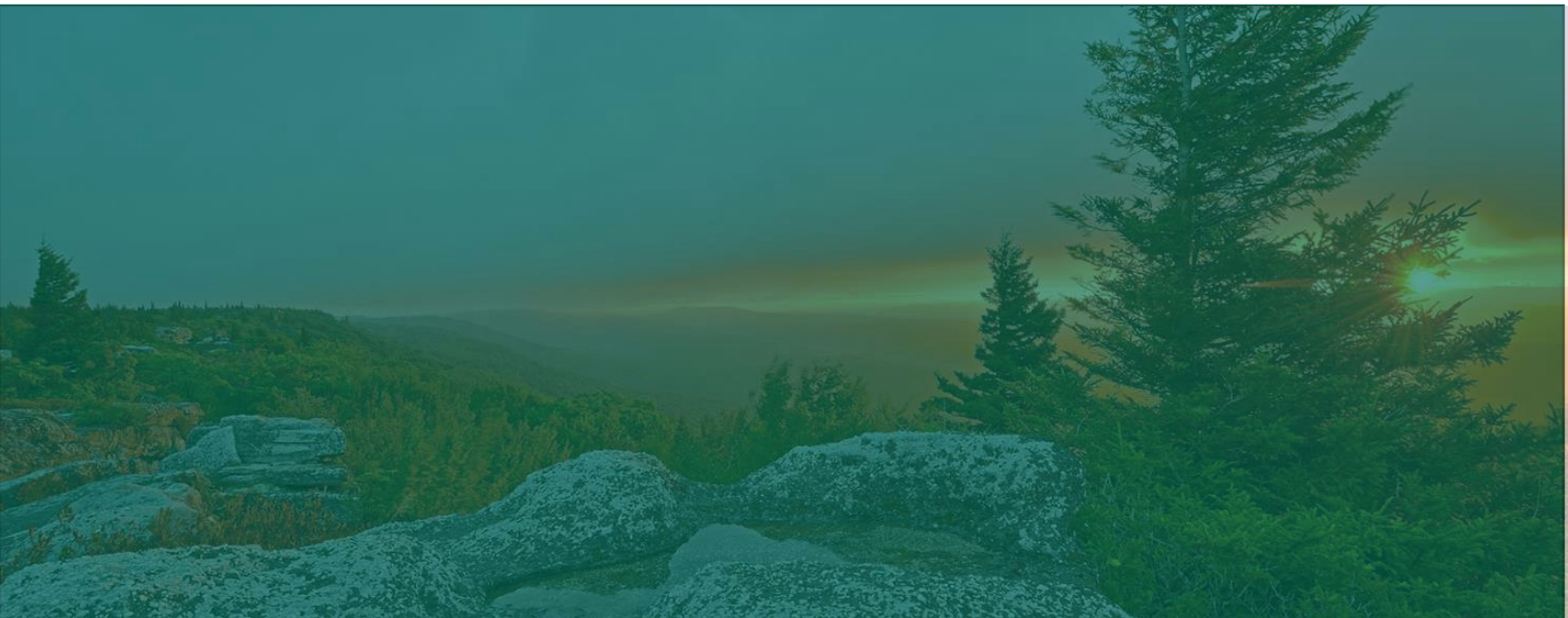
TPMA

West Virginia Statewide Broadband Survey

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Submitted to:

West Virginia Office of Broadband



Submitted by



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Executive Summary

Broadband internet has revolutionized everyday life, from social connection to education to business. As broadband access grows, communities across the country are working to enhance digital equity, so all residents can benefit.

To support their Broadband Equity, Access, and Deployment (BEAD) and Digital Equity broadband planning initiatives, the West Virginia Office of Broadband, in partnership with TPMA, administered a statewide broadband survey. This report summarizes the results from the survey, with key findings documented below.

Key Findings

- Responses were received from 2,050 West Virginians, with 422 being from individuals living in areas considered highly unserved by high-speed internet infrastructure.
- **The majority of participants report having home internet access. However, based on data from Speedtest by Ookla®, just 34% are receiving broadband speeds.** About two-thirds (66%) of respondents have recorded internet speeds of less than 25/3 Mbps.
- **DSL and cable are the two most reported internet types,** followed by cellular data plans for a smartphone or other mobile device. Despite most participants having high-speed internet technology, most do not have broadband speeds.
- **Residents are paying a relatively high cost, despite receiving slow speeds.** The median monthly cost for home internet is \$79.99, with 50% paying between \$59.99 and \$119.99.
- **Overall, there is a lack of knowledge of cost-saving programs, such as the Affordable Connectivity Program or Lifeline.** However, familiarity is highest in households making less than \$25,000 per year.
- **Survey respondents value internet speed, reliability, and affordability.** Most West Virginians are dissatisfied with their internet speed, reliability, and affordability.
- **When asked about their internet service provider, 50% report being dissatisfied.** This may signal a willingness to switch providers if there are other options available.

Acknowledgements

The West Virginia Office of Broadband

The West Virginia Office of Broadband was formed in 2021 under the West Virginia Department of Economic Development. West Virginia House Bill 2002, passed in 2021, outlines the office's responsibilities, many of which were previously assigned to the West Virginia Broadband Enhancement Council. The Broadband Enhancement Council has functioned since 2016 to oversee plans to expand broadband access to unserved and underserved parts of the State. The two groups now work in partnership.

TPMA

TPMA is a consulting firm specializing in economic development, workforce development, and evaluation. TPMA has worked with communities across the United States on broadband access and infrastructure projects. The firm was engaged to design the survey to be administered statewide, and to analyze and share the results upon close of the survey.

Key Partners

This survey and the digital equity efforts in the state that preceded it have been accomplished as part of a collaborative statewide initiative including partners across the State. These efforts are related to the Infrastructure Investment and Jobs Act (IIJA), Broadband Equity, Access, and Deployment (BEAD), and Digital Equity Programs, and will directly support West Virginia's BEAD and Digital Equity initiatives. Partners across the state include but are not limited to the following organizations:

- AARP West Virginia
- Generation West Virginia
- Marshall University Center for Business & Economic Research
- West Virginia Broadband Enhancement Council
- West Virginia Economic Development Council
- West Virginia Library Commission
- West Virginia Regional Planning & Development Councils
- West Virginia University StartUp West Virginia

Introduction

As broadband availability and adoption are expanding nationwide, largely due to important federal investments in broadband infrastructure, communities across the United States are strategizing to enhance digital equity so that all residents may reap the benefits of these investments. The availability of high-speed internet across all segments of a population is of primary concern to State and local governments, and ensuring equitable access requires assessing affordability, reliability, access to devices, and more.

This report summarizes the findings of a survey administered across the State of West Virginia to assess digital equity needs and understand where and to what extent to focus incoming investments in digital equity programming.

Project Background

What is Broadband?

The term broadband refers to high speed internet. To meet minimum federal qualifications to be considered broadband, internet connection must be achieved at download speeds of 25 Mbps and upload speeds of 3 Mbps (referred to as 25/3). Those with speeds lower than 25/3 Mbps are considered “unserved,” and those with speeds lower than 100/20 Mbps are considered “underserved.”

A variety of technologies may be used to provide broadband. While fiber-optic connection is the most recent promising development in wired connection and 5G is arguably the most recent promising development in wireless connection, several other technologies are used across the United States to connect communities, including cable, DSL, satellite, and a variety of wireless technologies not mentioned. Symmetrical speeds, where upload and download capabilities are equal (ex. 25/25mbps, 100/100mbps), may be achieved across multiple technologies, but typically connote fiber-optic connection, which has greater capacity to achieve high speeds both up and down, regardless of range.

What is Digital Equity?

Digital equity is a concept that relates to the (equitable) availability and accessibility of broadband internet, internet-enabled devices, and the attainment of digital skills across all segments of the population.

Because of the costs associated with broadband infrastructure installation, some groups, particularly in rural areas with low population density or areas with lower estimated adoption rates regardless of population density, are less likely than others to have the option to purchase a broadband internet subscription. Additionally, the cost of monthly internet service subscriptions and internet-enabled devices may act as a barrier to connectivity for low-income populations or those with transient living situations.

This disparity in access to broadband may ultimately lead to inequity in terms of education and employment opportunities, as many educational opportunities are conducted online or require internet connection to complete coursework, and both hiring processes and job requirements include increasing levels of digital skills and literacy.

Efforts to promote digital equity may include addressing infrastructure gaps, improving the affordability of broadband service, enhancing digital literacy, and more. These efforts often include partnerships between multiple stakeholders, including all levels of government, education providers, community organizations, and private industry.

Methodology

As part of the effort to understand digital equity needs and the current state of broadband, TPMA, in partnership with the West Virginia Office of Broadband, conducted a survey of residents in the state from June 28, 2023, to August 16, 2023.

The survey was designed to capture information about residents' current internet access and speed, satisfaction with their internet service, willingness to pay for faster speeds, and knowledge of affordable broadband and device programs, as well as how residents are using the internet and where. The survey was developed in collaboration with the West Virginia Office of Broadband, the BEAD and Digital Equity Core Planning Team, Digital Equity Steering Committee, West Virginia University, West Virginia Regional Planning & Development Councils, and Tilson Technology Management, Inc. A copy of the survey can be found in Appendix I.

Survey Distribution and Response

The survey was distributed using distribution partners, assembled by TPMA in partnership with the West Virginia Office of Broadband, the

West Virginia Library Commission, and West Virginia Broadband Enhancement Council marketing channels. Distribution partners received advanced materials in a distribution kit, including a printable flyer, online banner, and sample language for emails, newsletters, and social media. A copy of the English version of the distribution kit can be found in Appendix II.

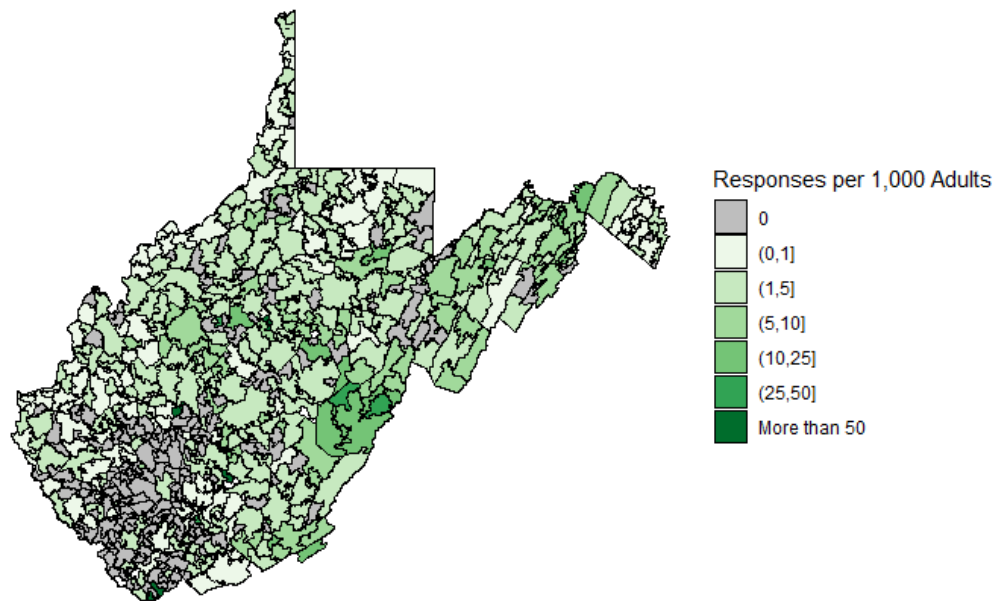
The survey and distribution kit were offered in both English and Spanish, to increase the accessibility of the materials. Further, the survey was available online and on paper. The online survey was hosted on the West Virginia Office of Broadband website; residents could access the paper surveys at their local library.

To increase reach in areas with poor or no internet service, 10,000 postcards were sent to homes in highly unserved zip codes, meaning zip codes with more than 2,000 unserved addresses. These postcards included information on accessing the survey online and in-person. A copy of the postcard can be found in Appendix III. Additionally, the West Virginia Office of Broadband and the Office of Marketing and Communication of the West Virginia Department of Commerce invested in social media and radio campaigns to boost participation.

The goal was to receive surveys from 1,000 qualified respondents (West Virginia residents age 18+), with at least 250 being from highly unserved zip codes. In total, 2,062 responses were received, with 2,050 being from qualified respondents. 422 responses were from highly unserved zip codes, or about 21% of qualified responses.

Responses per 1,000 adults who responded to the survey can be seen in the figure below.

Figure 1: Responses per 1,000 adults, by zip code.



Data Analysis

Survey responses were entered into ArcGIS Survey123 and exported to comma-separated values (CSV) file. The data were weighted and analyzed in R and RStudio.¹

The survey responses were weighted based on respondent age, educational attainment, and the percentage of the population living in a highly unserved zip code. Survey respondents tend to be older and have higher levels of educational attainment than the population as a whole. Weighting based on this, and location, make responses more reflective of West Virginia's adult population.

¹ R (<https://www.r-project.org/>); RStudio (<https://posit.co/download/rstudio-desktop/>)

Results

The results presented in this report are based on responses from the 2,050 participants in West Virginia. Unless otherwise indicated, the percentages reported are based on the “valid” responses from those who provided a definite answer and do not reflect non-responses or individuals who selected “prefer not to say.” All results reported here are weighted, unless otherwise noted.

Respondent Demographics

Demographic information was collected from survey respondents and is summarized in this section. Understanding the demographic characteristics of survey participants, and how this compares to the population, provides a more nuanced interpretation of survey results. All demographics shown here are weighted to provide context for the representativeness of survey results.

For the three demographic characteristics used for weighting (educational attainment, age, and location), weighted demographics match the population characteristics, as seen in the three figures below.

Figure 2: Respondents by educational attainment.

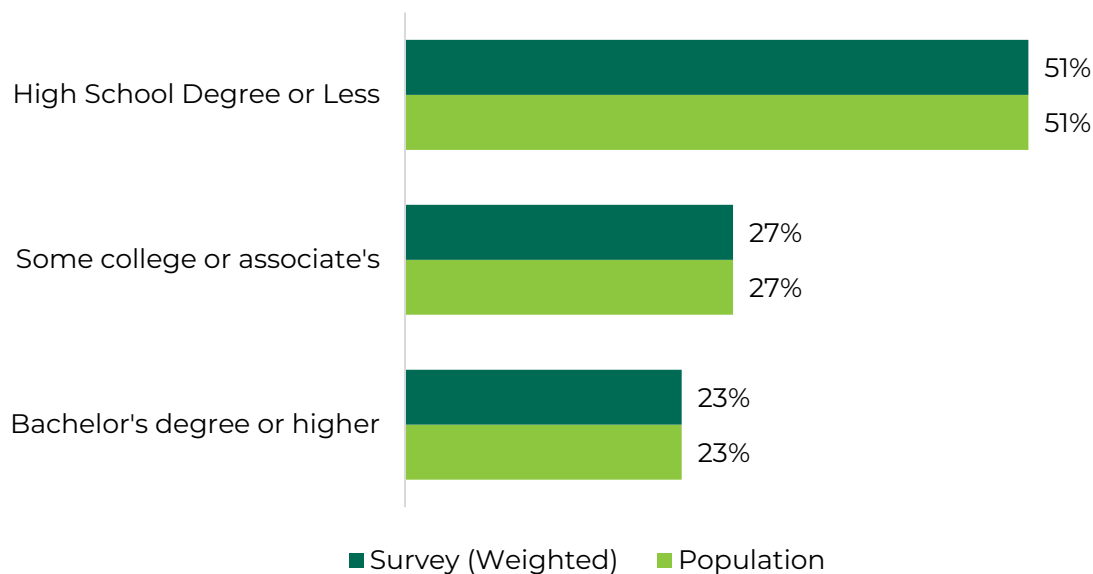




Figure 3: Respondents by age.

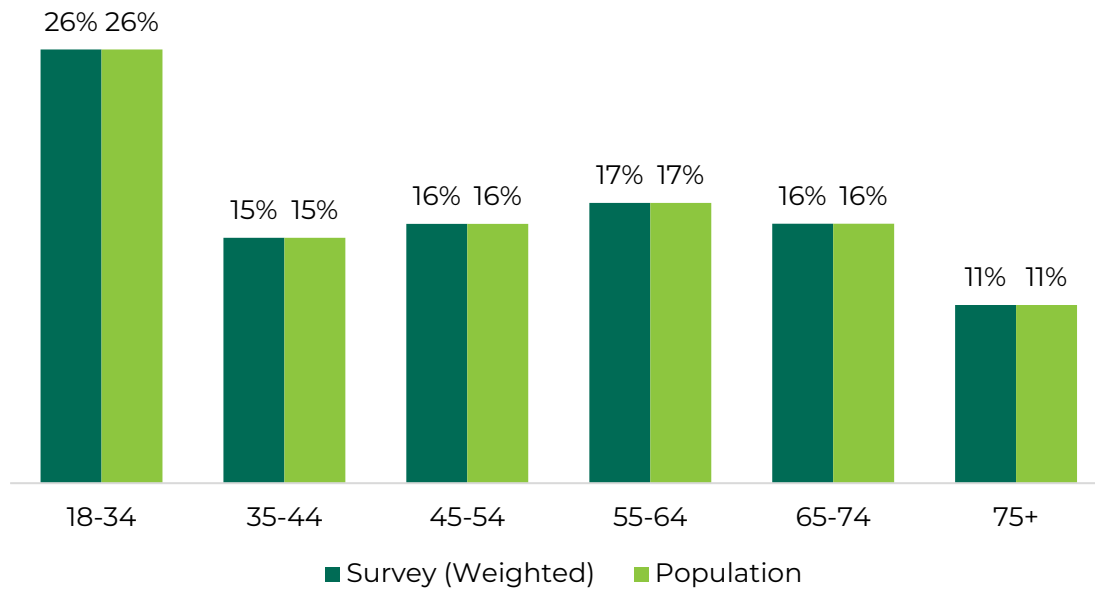
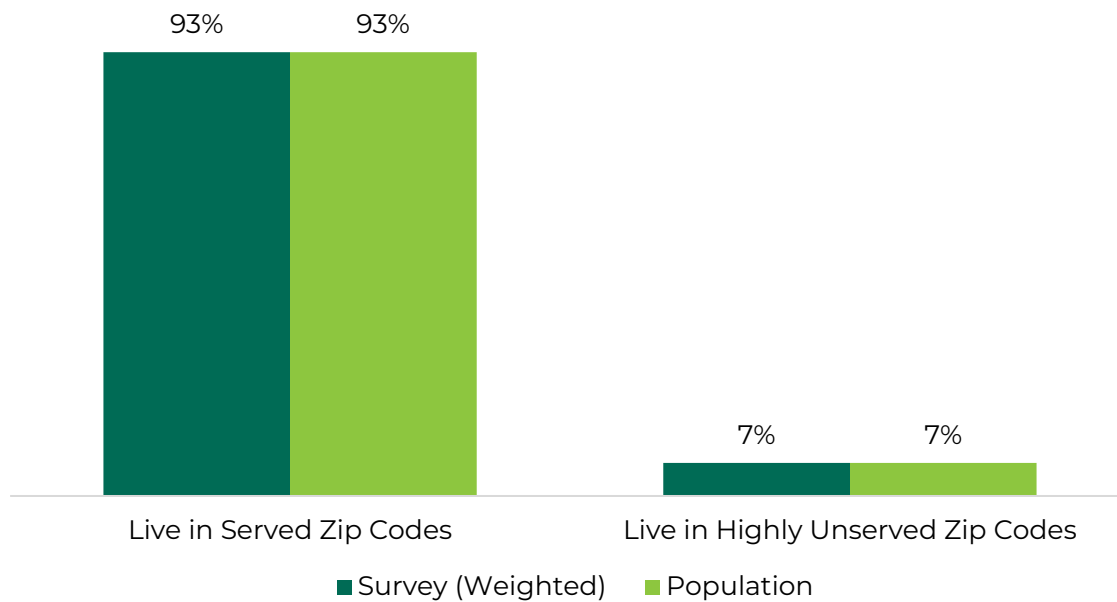
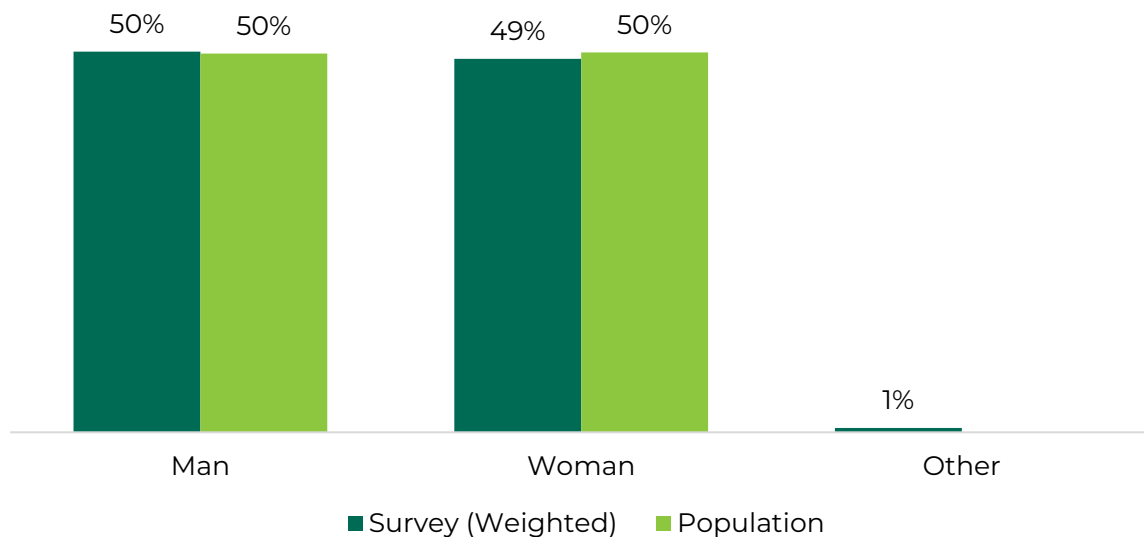


Figure 4: Respondents by location.



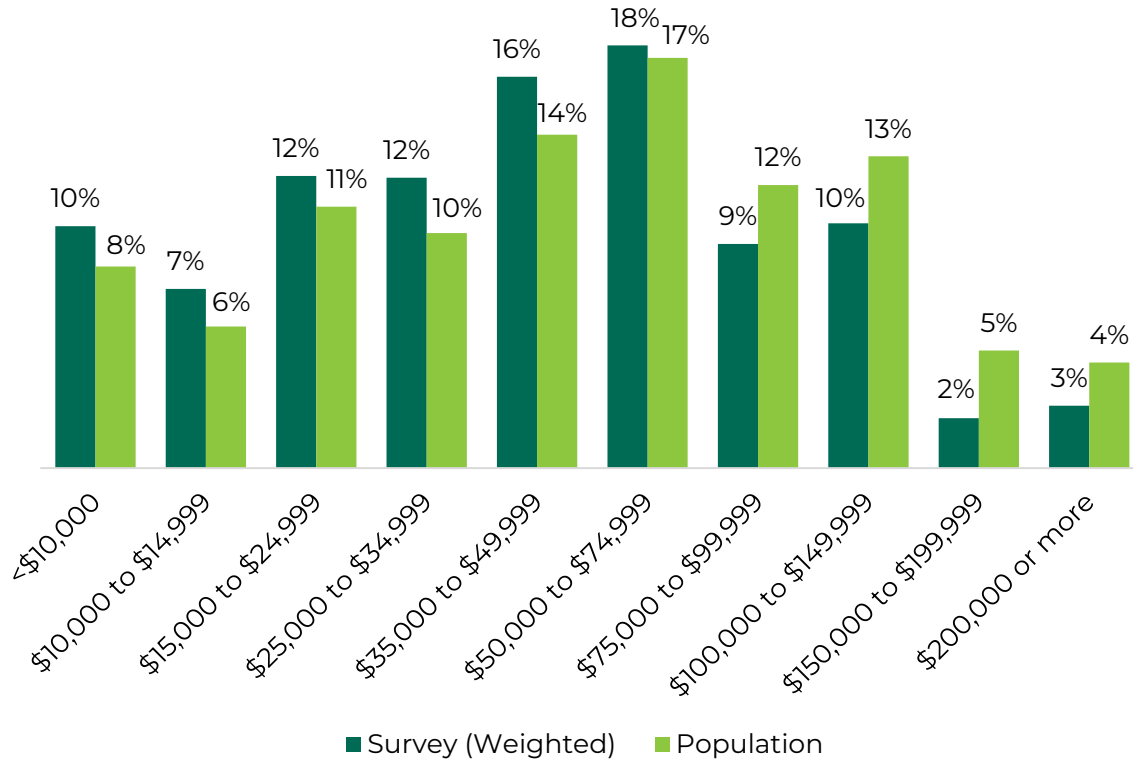
There is very slight variation in the gender of survey respondents when compared to the population as a whole. However, this is likely due to differences in survey wording. The U.S. Census (the source used for population characteristics) only allows respondents to select male or female. For this survey, respondents were presented with three options (woman, man, or nonbinary), as well as given the option to self-describe.

Figure 5: Respondents by gender.



Respondents' reported household incomes are similar to the population. There is no more than a three-percentage point difference between the percent of survey respondents and the percent of the population that fall into that income bracket.

Figure 6: Respondents by household income



As shown in the following two tables, the percentage of respondents reporting White was slightly higher than the state as a whole. The percentage reporting Hispanic or Latino was slightly less than the state as a whole. However, the variation is slight, no more than three percentage points.

Table 1: Respondents by race.

Race	Survey (Weighted)	Population
White	96%	94%
Black	1%	4%
Asian	0%	1%
American Indian or Alaska Native	0%	0%
Other	3%	2%

Table 2: Respondents by ethnicity.

Ethnicity	Survey (Weighted)	Population
Hispanic or Latino	1%	2%
Not Hispanic or Latino	99%	98%

Almost one-quarter (23%) of West Virginia adults have a disability. This matches the percentage of respondents that reported having a disability.

Table 3: Respondents by disability status.

Disability Status	Survey (Weighted)	Population
Identifies as a person with a disability	23%	23%
Does not identify as a person with a disability	77%	77%

Digital Equity Covered Population

The Digital Equity Act identifies covered populations, those who are likely to be most impacted by the digital divide. The percentage of respondents (weighted) who fell into those categories can be seen in the table below. In total, 96% of participants fell into one or more of the digital equity covered categories.

Table 4: Percent of respondents in digital equity covered populations.

Digital Equity Covered Population	% of Respondents
Non-White and Non-Hispanic	3%
English Language Learners or have difficulty understanding English	14%
Live outside the city boundaries of Charleston, Morgantown, Huntington, Parkersburg, or Wheeling	90%
Veterans of the US Military	13%
Household income less than or equal to 150% of the federal poverty guidelines ²	42%
Ages 65+	26%

² Respondents reported their annual household income as a range. The midpoint of the range, as well as their reported household size, was used to estimate the number of households with household incomes less than or equal to 150% of the 2023 federal poverty guidelines.

Access

Internet Service

Understanding existing internet access in West Virginia is critical to planning future investments for the state. The first question respondents were asked (aside from an eligibility screening) was if they have internet access at home. 90% reported having home internet access, with a larger percent of older respondents, higher income respondents, and those not living in highly unserved zip codes having home internet access, as shown below.

Figure 7: Home internet access by age group.

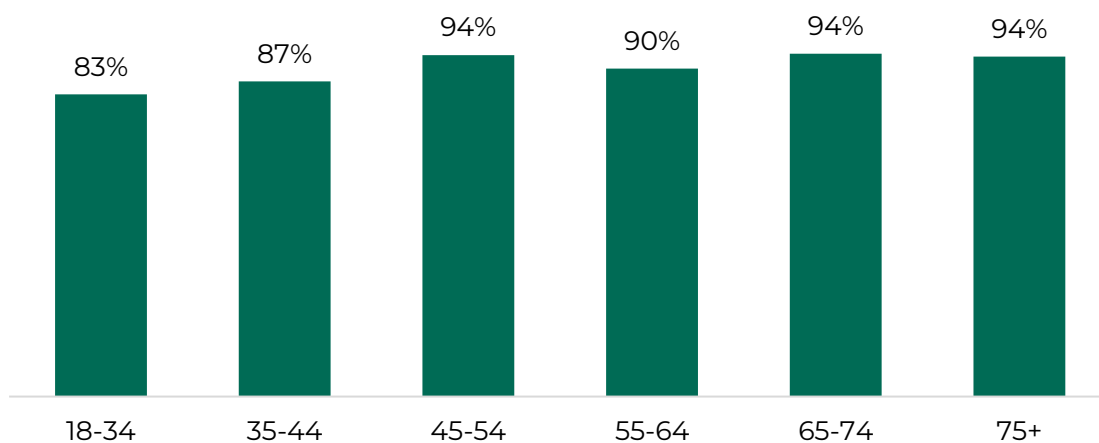


Figure 8: Home internet access by household income.

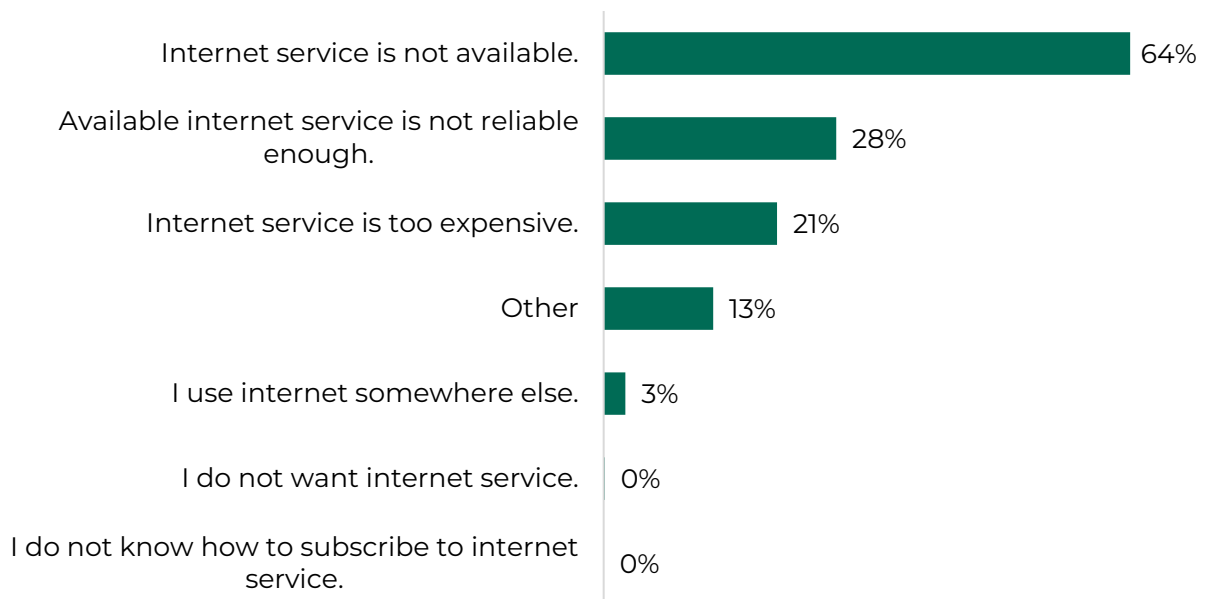


Table 5: Home internet access by location.

	Home Internet Access	No Home Internet Access
Highly Unserved Zip Code	82%	18%
All Other Zip Codes	90%	10%

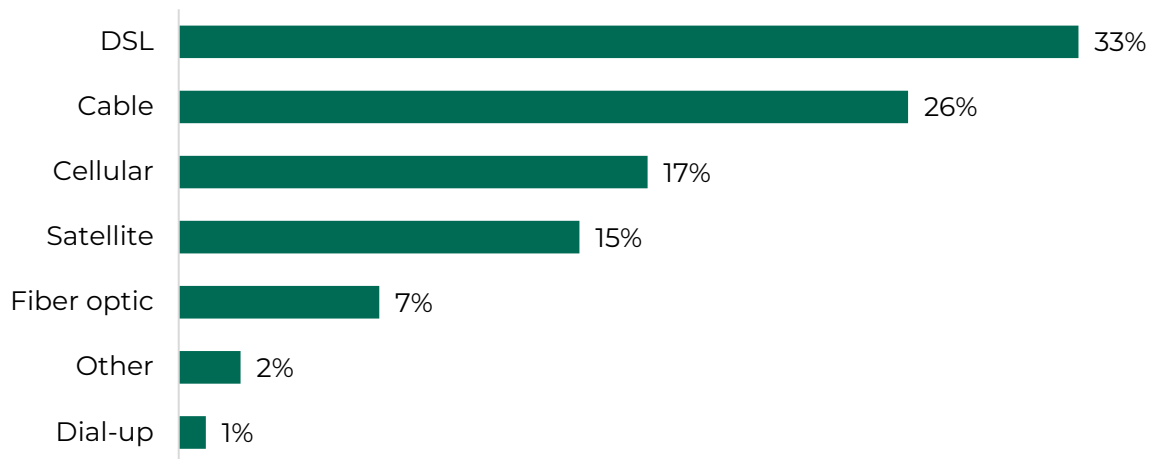
For those without internet access, the most reported reason was lack of availability. Reliability and cost were the next highest reasons, reported by over 20% of West Virginians. Most are interested in signing up for high-speed home internet, however, over 60% report that high-speed service is not available.

Figure 9: Reasons for not having internet access at home.



Digital subscriber line (DSL) and cable internet were the most commonly reported internet connection types, followed by a cellular data plan for a smartphone or other mobile device.

Figure 10: Responses by internet type.³



Almost 50% of respondents used Frontier as their internet service provider (ISP). The next most frequently reported ISP was Optimum (Suddenlink, Altice), which was used by just 12% of respondents.

Table 6: Five most frequently reported ISPs.

Internet Provider	% of Respondents
Frontier	47%
Optimum (Suddenlink, Altice)	12%
Comcast	8%
HughesNet	6%
T-Mobile	5%

Internet-Enabled Devices

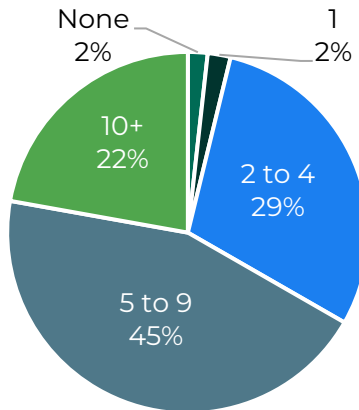
As more and more of everyday life moves online, the importance of internet-enabled devices grows. These tools can enable individuals to complete important tasks, such as work, telehealth, and schoolwork, among others. They are also a vehicle for social interaction, making it easier to stay connected with those outside of your local community.

The survey first asked respondents *if* they had internet-enabled devices in their home, and then how many. The vast majority of respondents

³ Respondents could select all internet types; percentages will not add to 100. Responses saying “Not sure” were omitted.

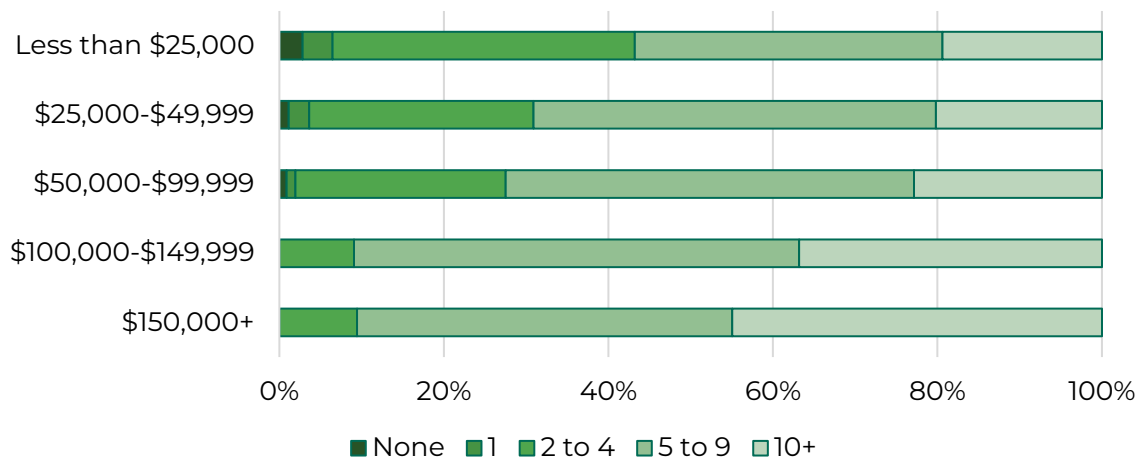
(over 98%) reported having internet-enabled devices in their home. Even among those without internet access, almost 90% report having internet-enabled devices, demonstrating the ubiquity and importance of these devices in today's society.

Figure 11: Number of internet-enabled devices in respondents' households.



Almost all respondents reported having multiple internet-enabled devices, with 67% having more than five devices in their household. Higher-income households tend to have more internet-enabled devices, compared to lower-income households, as shown in the figure below.

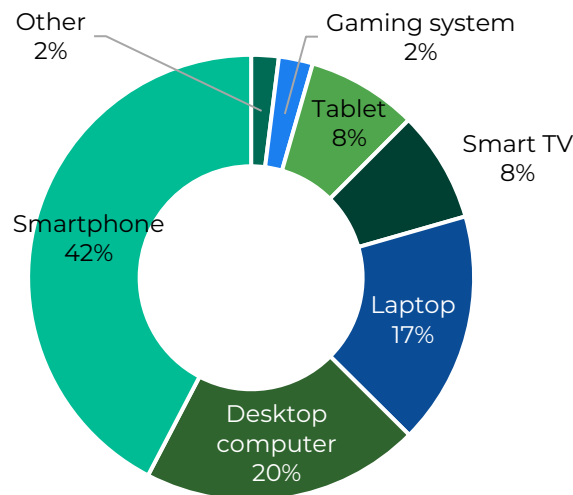
Figure 12: Number of internet-enabled devices by household income.



Smartphones were the most frequently reported primary device for accessing the internet. While smartphones may be insufficient for work

or education, they are able to effectively handle many common tasks, such as email, online banking, reading news, or social media.

Figure 13: Primary internet-enabled device.



For those without internet-enabled devices, cost, lack of internet access, and other financial priorities are the most reported barriers. However, these results should be interpreted with caution, due to low responses (n = 18).

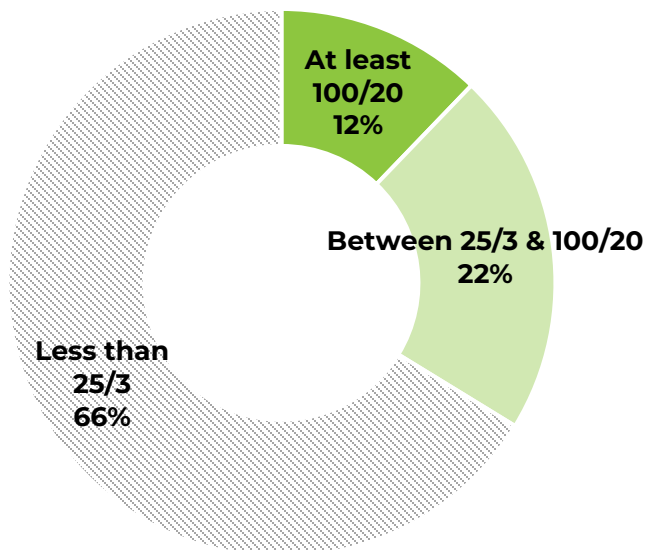
Speed

Internet speeds for this survey were collected on the West Virginia Office of Broadband website using Speedtest by Ookla®, an online tool that collects data on internet speed and connection. Speed test results were collected for 1,478 out of 1,916 respondents⁴ who reported having home internet access (or 75%).

Speed test results from this survey show that 66% of participants have internet speeds less than 25/3 Mbps. Almost 25% of respondents have measured speeds between 25/3 and 100/20 Mbps, and just 12% record having internet speeds of at least 100/20 Mbps. However, it should be noted that those with slow internet connections may be more likely to take the survey, potentially skewing results.

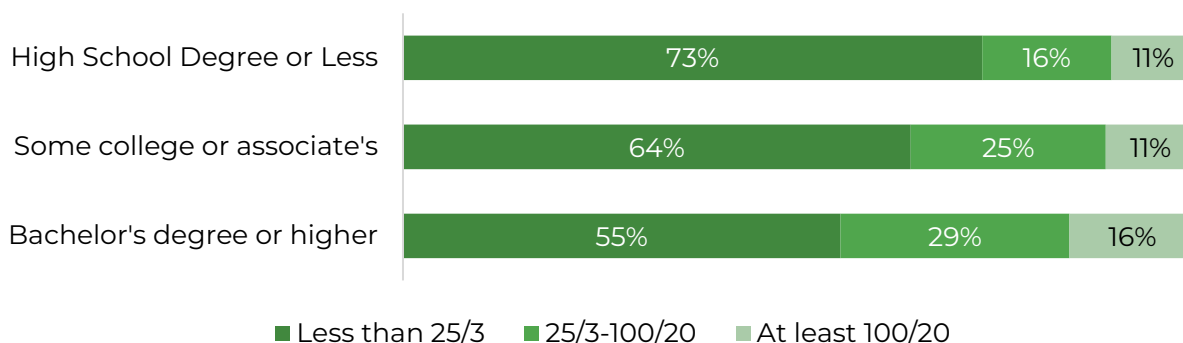
⁴ Unweighted

Figure 14: Participant internet speeds.⁵



Those with higher educational attainment, in the highest income bracket, and not living in highly unserved zip codes were more likely to have faster speeds, as shown in the figures below.

Figure 15: Internet speeds by educational attainment.



⁵ Percentages are based on the results of Speedtest by Ookla®. Speed test results were not received for all respondents who reported having home internet connections.

Figure 16: Internet speed by household income.

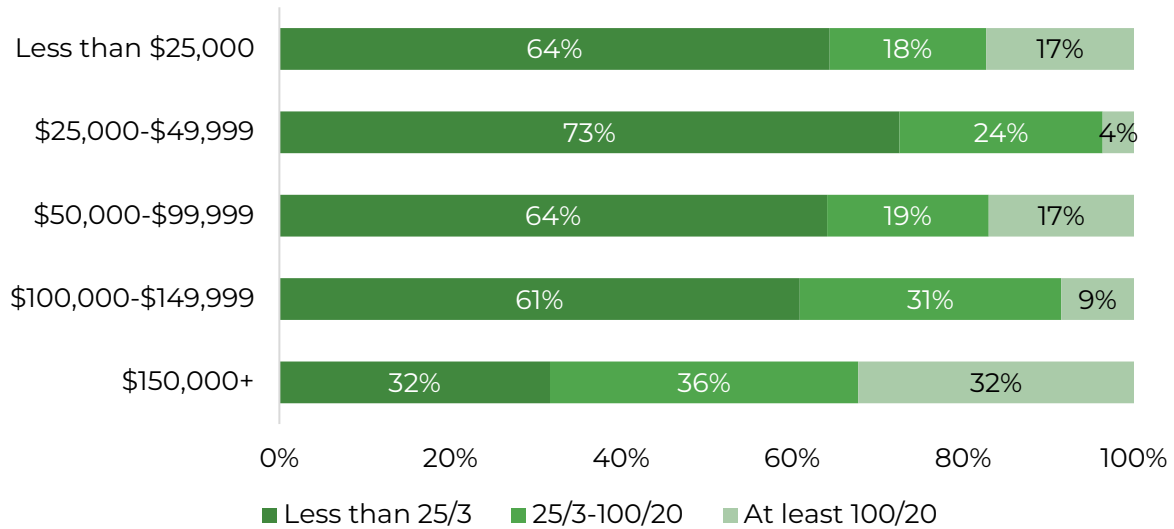
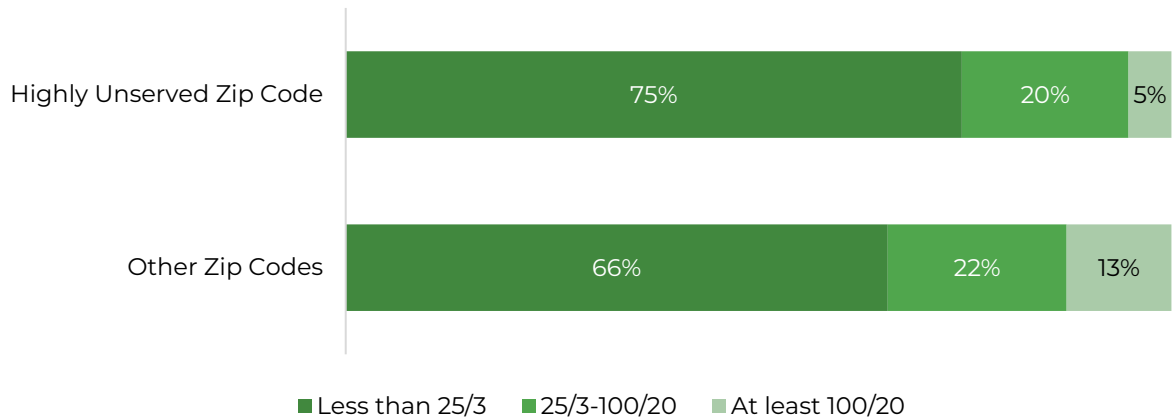
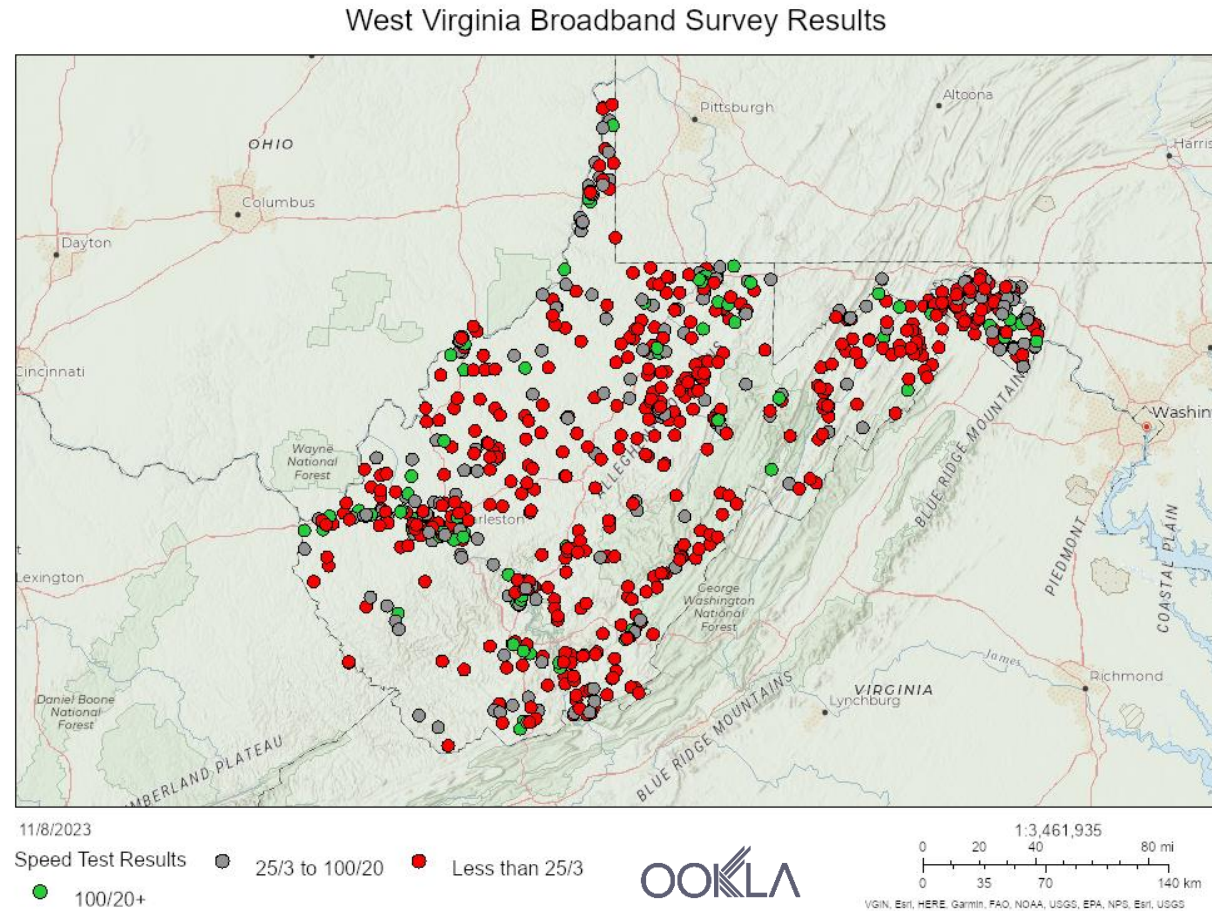


Figure 17: Internet speed by location



Internet speeds by location were mapped using location data collected during the survey process; the resulting map can be seen on the next page.

Figure 18: Map of internet speeds (unweighted).

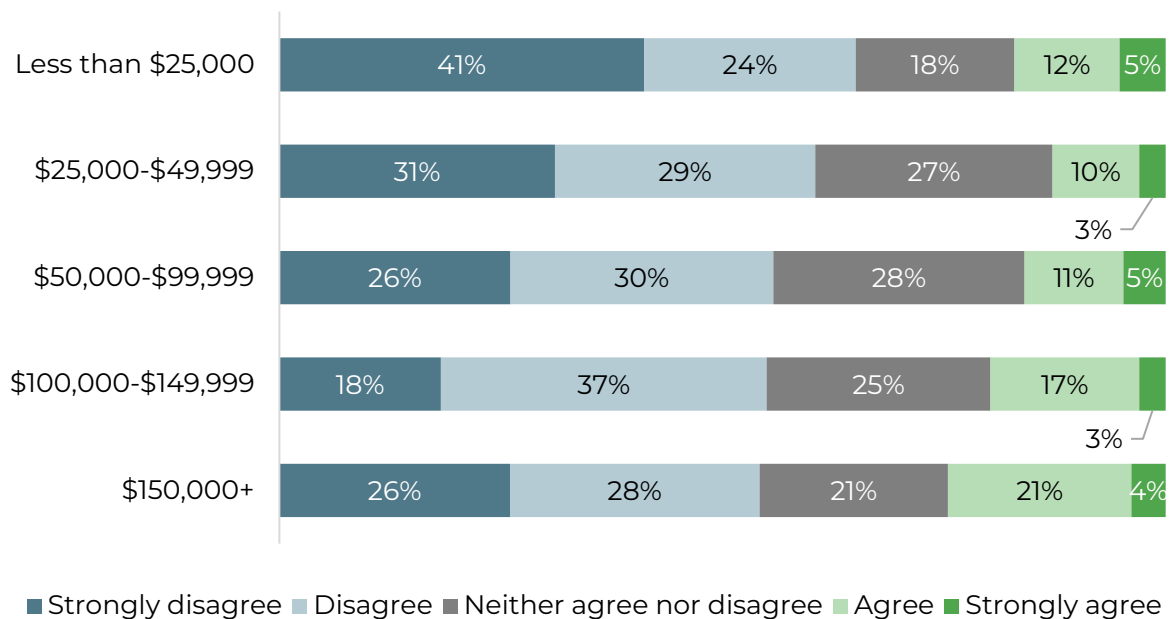


Affordability

Internet Service

To ensure broadband accessibility, individuals must be able to subscribe to internet service at an affordable price. When presented with the statement, “My home internet is affordable,” 60% of West Virginians disagreed or strongly disagreed. This persisted even when respondents were grouped by household income; this may be an indication that respondents’ perception of affordability and value is being influenced by other factors, such as reliability or speed.

Figure 19: Level of agreement with the statement "My home internet is affordable" by income level.



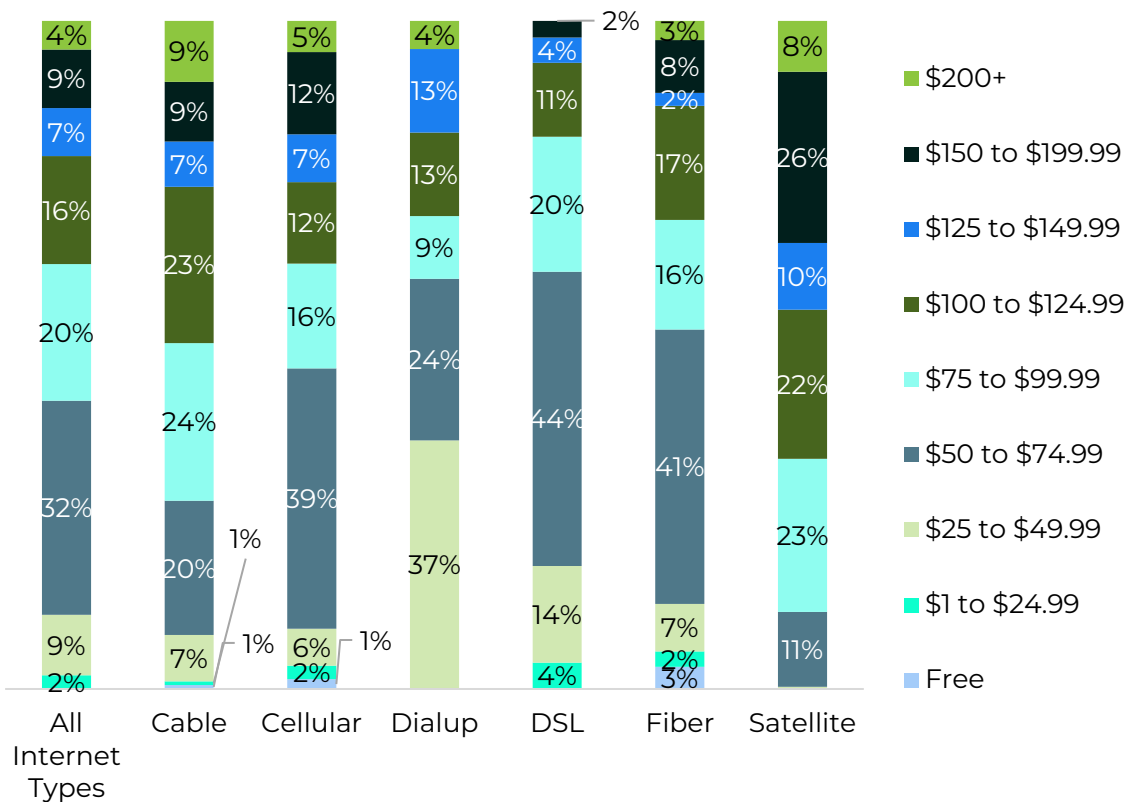
For further insight into affordability, respondents were asked to report their monthly home internet cost. The median cost for internet service was \$79.99, with 50% of respondents paying between \$59.99 and \$119.99. As shown in the table below, one-third of respondents pay \$100 per month or more for internet service.

Table 7: Reported monthly internet cost.

Monthly Internet Cost	% of Respondents
Free	0%
\$1 to \$24.99	2%
\$25 to \$49.99	9%
\$50 to \$74.99	32%
\$75 to \$99.99	20%
\$100 to \$124.99	16%
\$125 to \$149.99	7%
\$150 to \$199.99	9%
\$200+	4%

Those with satellite internet connections tended to pay more than those with other connection types, with 66% paying \$100 or more per month.

Figure 20: Monthly payment for internet service by connection type.



Despite most respondents (80%) saying that they want better internet service than they currently have, almost half (48%) are unwilling to pay more per month for internet service.

Table 8: Additional amount respondents are willing to pay for better internet service.

Additional Amount per Month	% of Respondents
\$0	48%
\$1 to \$9	2%
\$10 to \$19	8%
\$20 to \$29	10%
\$30 to \$39	2%
\$40 to \$49	3%
\$50 to \$74	10%
\$75 to \$99	4%
\$100 to \$149	9%
\$150+	3%

Those with slower speeds (less than 25/3 Mbps) were more willing to pay for improved internet service, compared to those with faster speeds. Over 50% of those with speeds less than 25/3 were willing to pay at least \$20 more per month for improved service, compared to 24% of those with speeds between 25/3 and 100/20, and 28% of those with speeds of at least 100/20.

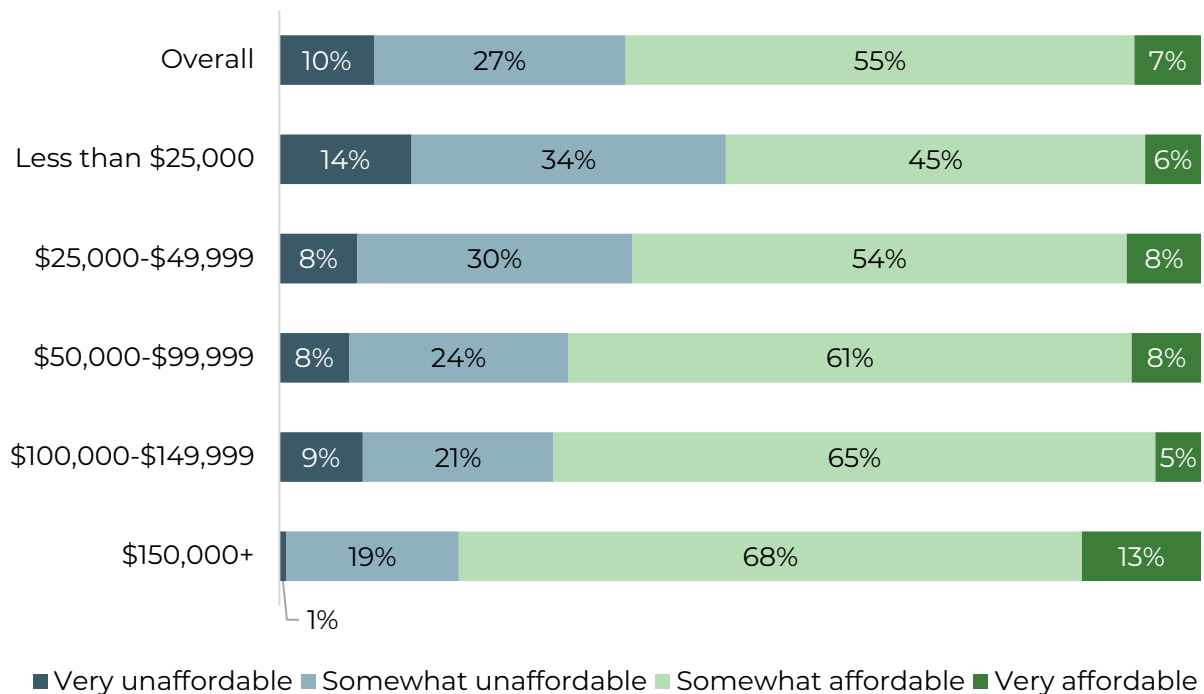
Table 9: Additional amount respondents are willing to pay for better internet service by home internet speeds.

	\$0	\$1 to \$19	\$20 to \$49	\$50 to \$99	100+
Less than 25/3	38%	10%	19%	15%	18%
Between 25/3 and 100/20	66%	10%	8%	11%	6%
100/20+	66%	5%	13%	11%	5%

Internet-Enabled Devices

In addition to internet affordability, respondents were asked about the perceived affordability of internet-enabled devices, as well as their knowledge of programs to lower the financial barriers to accessing these devices. Overall, 62% of West Virginians reported that internet-enabled devices were at least “somewhat” affordable. However, this varied by income level, with a larger percentage of those with higher incomes reporting that internet-enabled devices are “somewhat” or “very” affordable, as shown in the figure below.

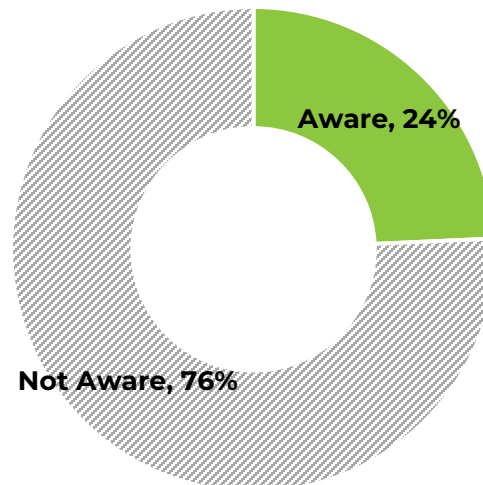
Figure 21: Perceived device affordability by household income.



Cost-Saving Programs

Over three-quarters of West Virginians were not aware of programs that provided free or reduced-price internet-enabled devices, or loan programs for internet-enabled devices. While a larger percentage of those with incomes less than \$25,000 a year reported knowledge of these programs (36%), the majority were unaware (64%). Increasing awareness of these programs could reduce the barriers to accessing these devices and help bridge the digital divide.

Figure 22: Awareness of free or reduced-price internet-enabled device programs, or device loan programs.



This lack of awareness was reflected in participants' usage of these programs. Just 11% of respondents reported participating in one of these programs.

Table 10: Use of free or reduced-price internet-enabled device programs, or device loan programs.

Response	% of Respondents
Yes, I have successfully used those programs	7%
Yes, but I faced challenges in using them.	4%
No, I am not aware of those programs.	54%
No, I have not needed to use those programs.	28%
No, I wanted to or tried, but was unsuccessful.	7%

There was some variation in program usage by income level. However, uptake remained low, even for those in the lowest income brackets.

Table 11: Use of programs that provide free or reduced-price internet-enabled devices, or internet-enabled device loan programs.

	Yes, I have successfully used those programs	Yes, but I faced challenges in using them.	No, I am not aware of those programs.	No, I have not needed to use those programs.	No, I wanted to or tried, but was unsuccessful.
Less than \$25,000	16%	10%	52%	12%	9%
\$25,000 to \$49,999	5%	5%	58%	25%	6%
\$50,000 to \$99,999	3%	1%	54%	35%	7%
\$100,000 to \$149,999	0%	1%	47%	46%	7%
\$150,000+	0%	1%	40%	57%	2%

However, a slightly larger percentage (six percentage points) of participants reported familiarity with the Affordable Connectivity Program (ACP) or Lifeline. This may indicate that more education needs to be done around program benefits, since eligible households can receive a one-time device discount through the ACP. Further, 39% of respondents who reported familiarity with ACP or Lifeline said that they weren't aware of free or reduced-price device programs, or device loan programs.

Figure 23: Familiarity with the Affordable Connectivity Program or Lifeline.

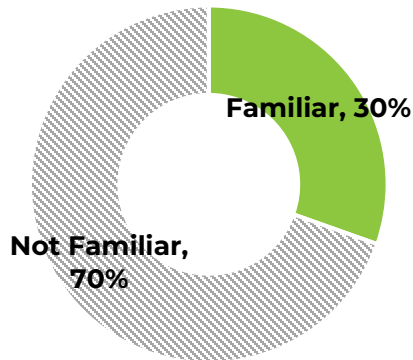
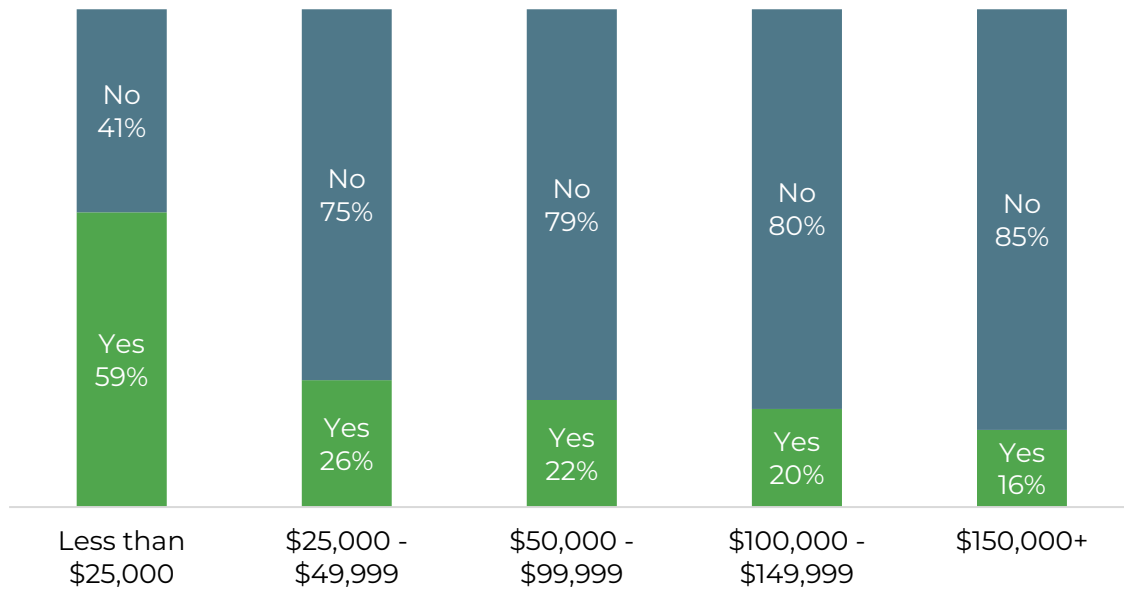


Table 12: Familiarity with ACP or Lifeline compared to reported familiarity with free or reduced-price device programs, or device loan programs.

Familiarity with ACP or Lifeline	Familiarity with Device Discount or Loan Program	
	Yes	No
	Yes	No
	61%	39%
	No	8%
		92%

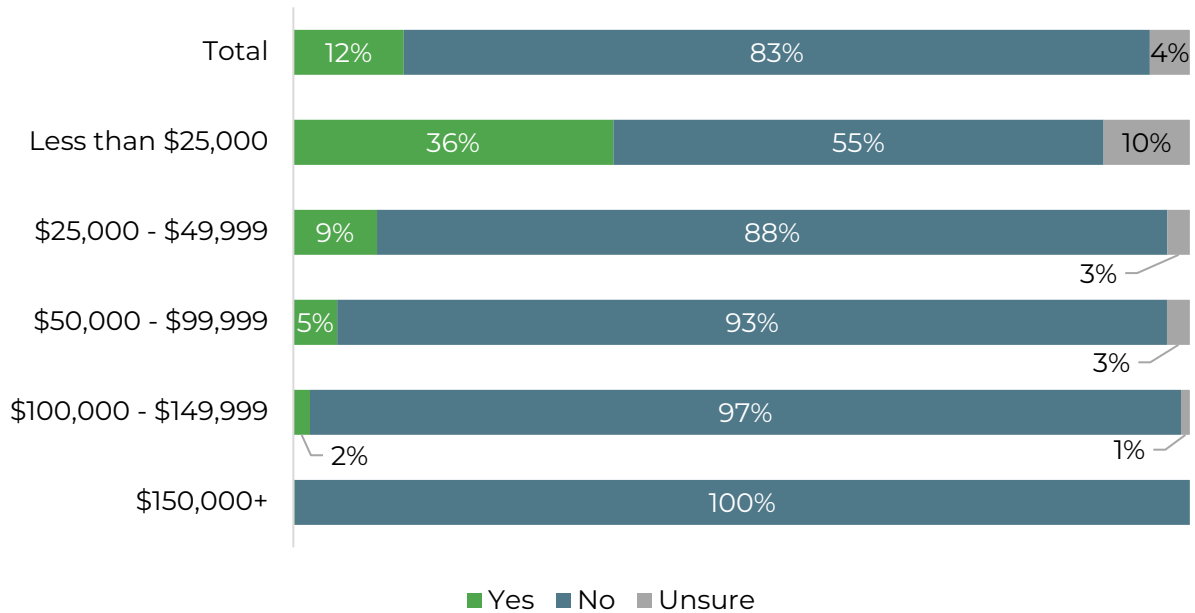
While overall familiarity was low, this was stratified by household income. Importantly, 59% of respondents with household incomes less than \$25,000 per year were aware of the ACP or Lifeline. Familiarity was much lower in all other income brackets.

Figure 24: Familiarity with the ACP or Lifeline by household income.



Most respondents reported that their households do not participate in these programs. As with familiarity, this varied by income level, with 36% of those making less than \$25,000 per year reporting participation in the programs, compared to 9% of those with household incomes between \$25,000 and \$49,999.

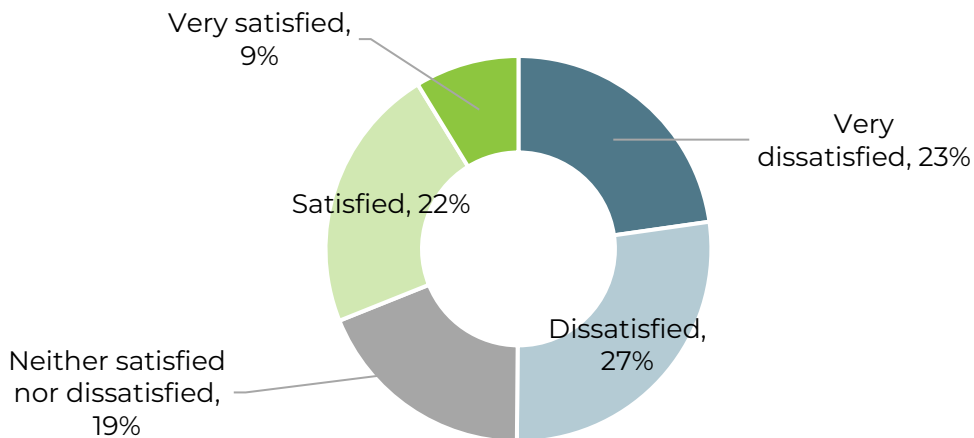
Figure 25: Reported participation in the ACP or Lifeline by household income.



Satisfaction

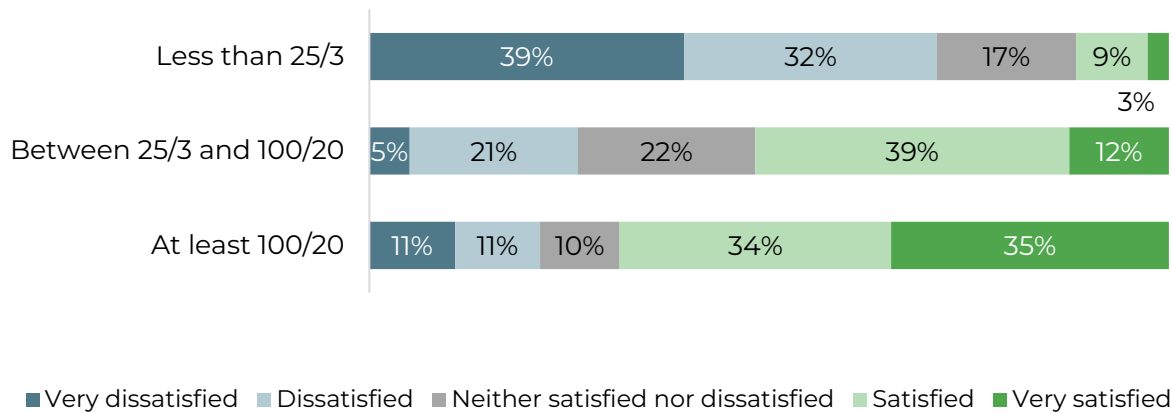
50% of respondents were dissatisfied or very dissatisfied with their ISP. Just 31% reported being satisfied or very satisfied.

Figure 26: Satisfaction with ISP.



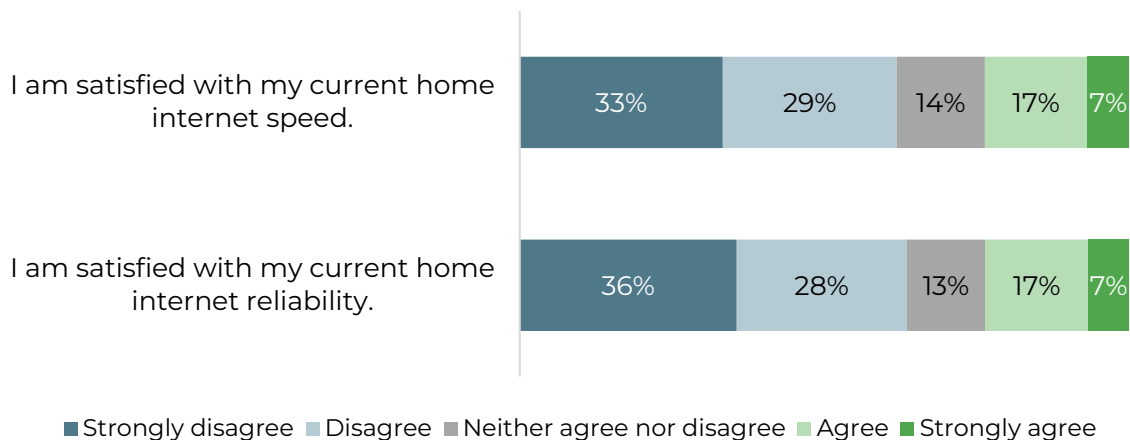
Those with higher internet speeds reported higher levels of satisfaction with their ISP.

Figure 27: Satisfaction with ISP by connection speed.



To learn more, respondents were asked about their satisfaction with their home internet reliability and speed. They were presented with two statements and asked to select their level of agreement. Reactions to both statements were very similar, with over 60% of respondents being dissatisfied with their home internet speed and reliability. A larger percentage of those with speeds less than 25/3 Mbps disagreed with the statements, compared to those with speeds of at least 25/3 Mbps.

Figure 28: Satisfaction with current home internet speed and reliability.



Usage

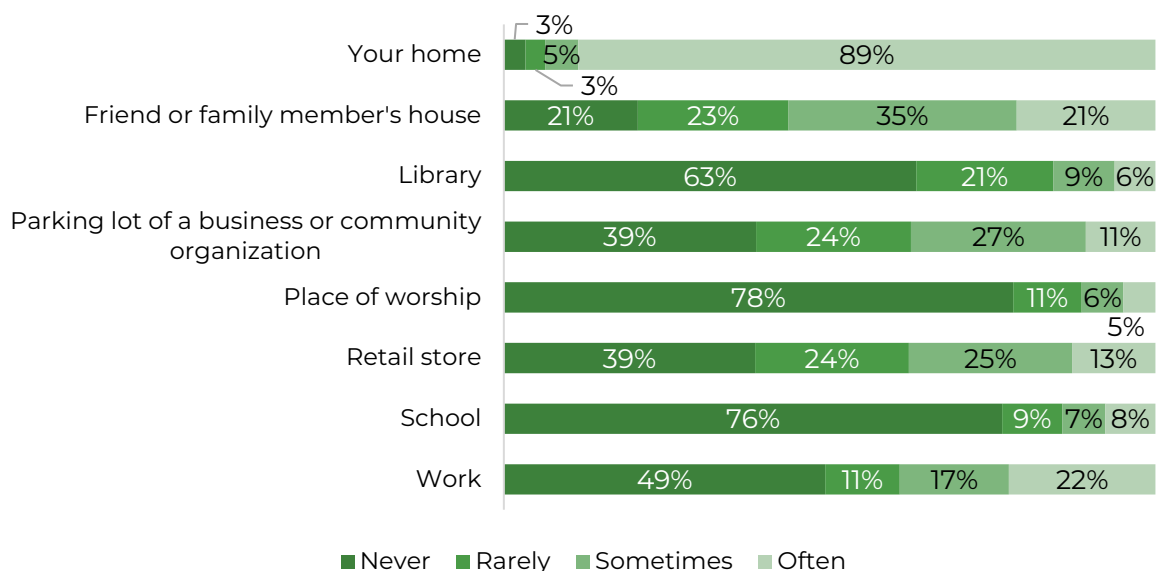
Most West Virginians access the internet at least once a day, regardless of having home internet access.⁶ Even for those without internet access, 87% reported using the internet at least once a day, demonstrating the necessity and ubiquity of internet access for everyday life.

Table 13: Internet use frequency by home internet status.

Internet Use Frequency	All	With Home Internet	Without Home Internet
Almost constantly	61%	64%	30%
Several times a day	35%	34%	45%
About once a day	2%	1%	11%
Several times a week	1%	0%	5%
Less than several times a week	1%	0%	5%
Never	0%	0%	4%

Respondents most frequently reported using the internet at their home or the home of a friend or family member.

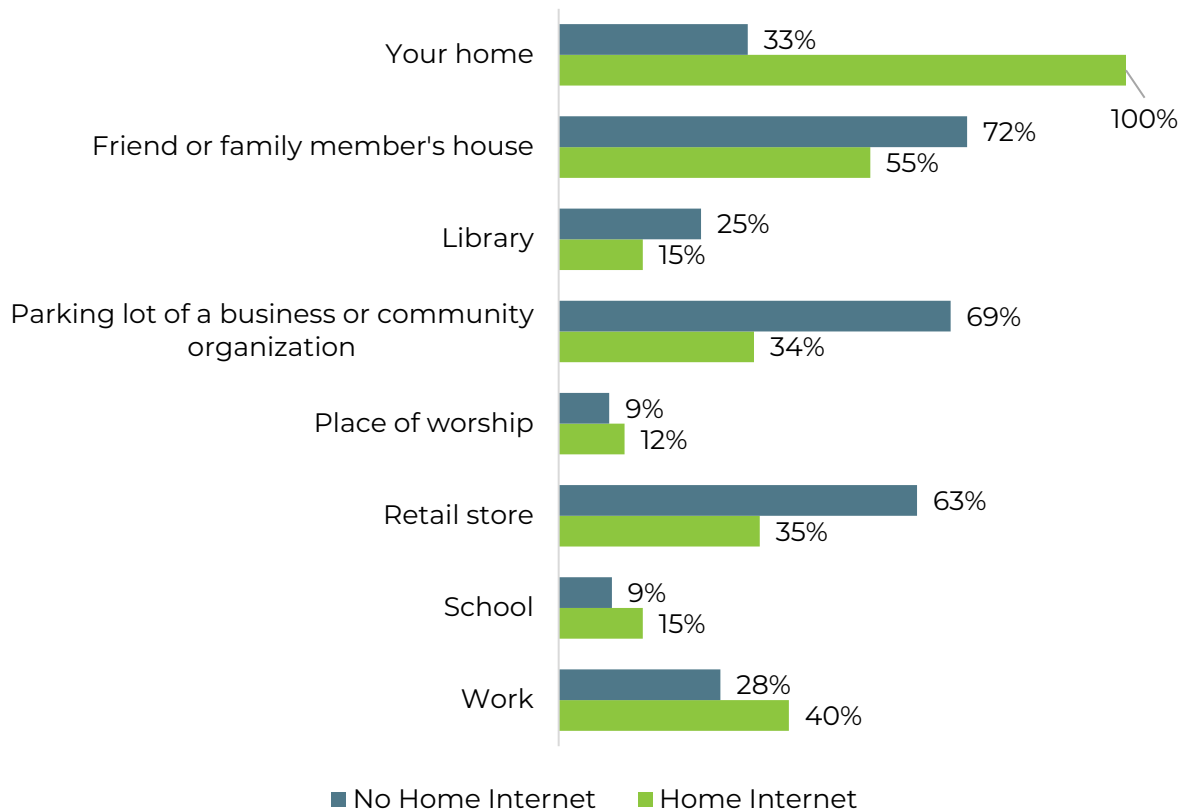
Figure 29: Frequency of personal internet use at different locations.



⁶ Information on desired internet skills and activities for non-internet users have been omitted due to low responses.

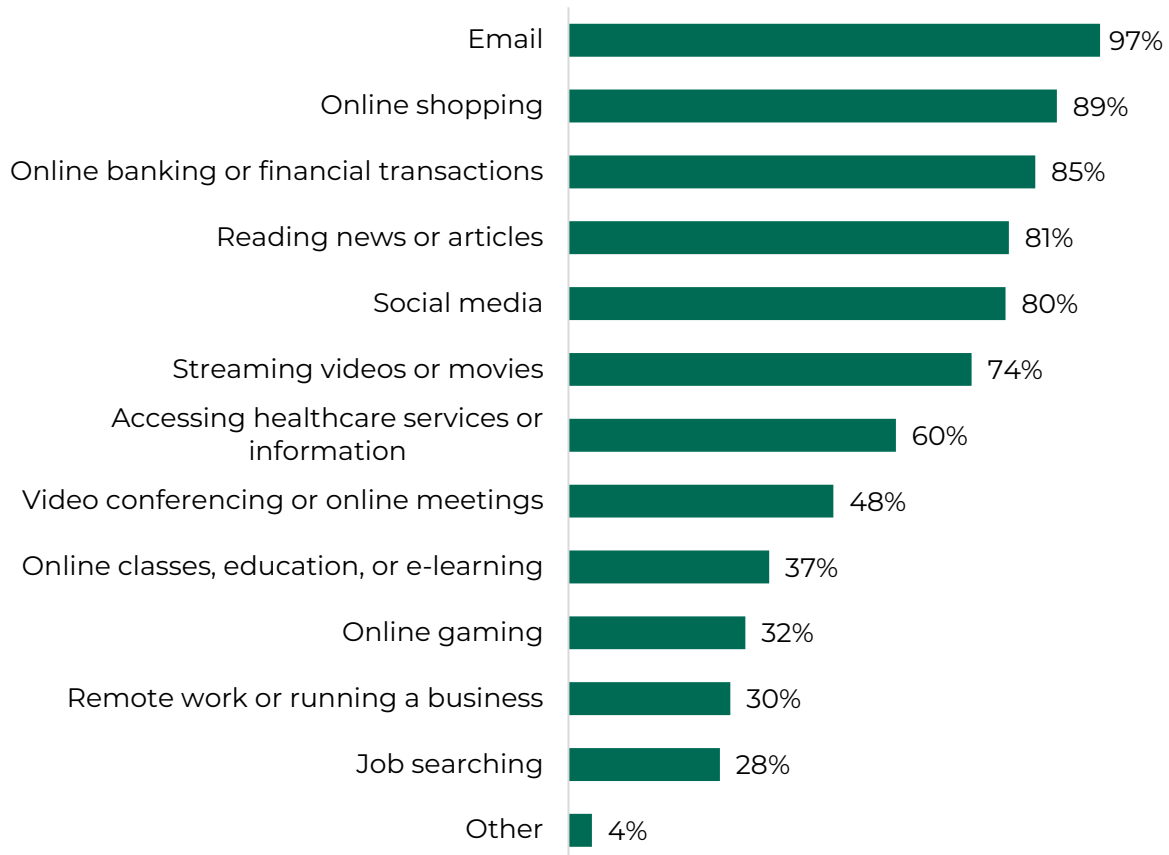
Unsurprisingly, those with home internet reported using the internet at home most regularly. Other common locations included the homes of friends or family members and work. For those without home internet connections, three locations were the most commonly used: 1) a friend or family member's house; 2) the parking lot of a business or community organization; and 3) a retail store.

Figure 30: Percent of respondents who "sometimes" or "often" use the internet for personal use in the location, by home internet status.



Respondents were asked about their use of the internet for different activities, as shown in the figure below. Email was the most frequently reported activity, used by 97% of participants. Online shopping, banking or financial transactions, reading news or articles, and social media round out the top five, with all being reported by more than 80% of participants.

Figure 31: Internet use activities.



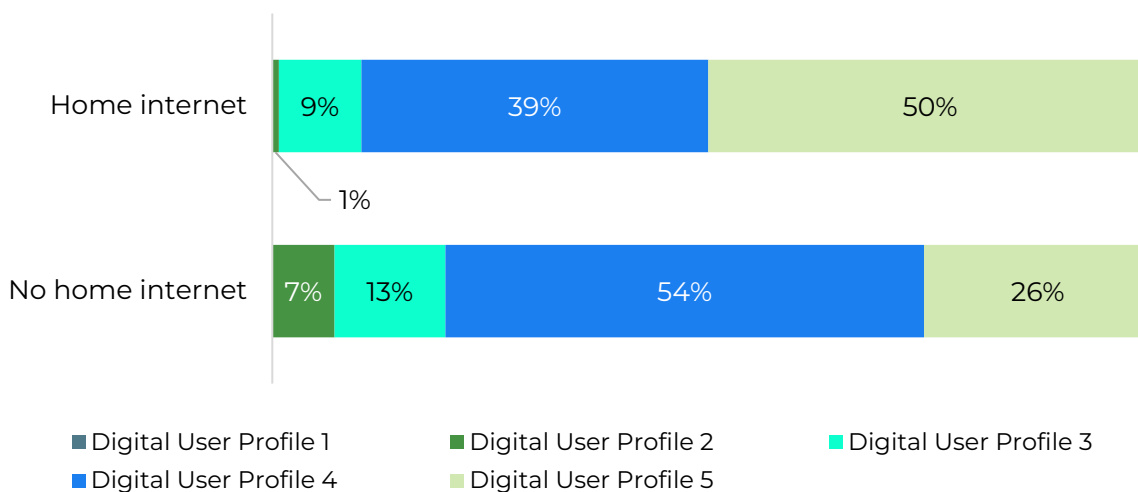
To better understand internet skills and digital literacy, survey respondents were presented with five short paragraphs about internet usage and asked to select the one that best describes them. These profiles range from someone who never uses the internet, to a heavy internet user, confident in their ability to troubleshoot technical issues. Most respondents selected User Profile 4 or User Profile 5, meaning that they are at least daily internet users, who use the internet for a variety of tasks, and rarely need assistance.

Table 14: Internet user profile.

User Profile	Description	% of Respondents
1	I never use the internet and I am not interested in increasing my internet use or skills. I prefer more traditional methods of communication, such as phone calls, mail, and face-to-face conversations.	0%
2	I rarely use the internet and find that navigating the internet and social media can be challenging for me. I often need help when using a computer or the internet.	1%
3	I use the internet for limited tasks, such as email and social media. I am comfortable performing the tasks I know how to do, but doing other things online can be challenging for me and I sometimes need help.	10%
4	I use the internet daily for a variety of different tasks, such as email, social media, video streaming/conferencing. I am comfortable with learning tasks and rarely need help.	41%
5	I am a heavy internet user. I use the internet daily for many different tasks, such as gaming, programming, video streaming, email, and social media. I am confident in my ability to troubleshoot technology issues and learn new tasks.	48%

While those with and without home internet both reported a high level of proficiency online, a larger percentage of those with home internet reported being at the highest level of proficiency, compared to those without home internet.

Figure 32: Digital user profile by home internet status.



Reported proficiency also varied by age, with a larger percentage of older respondents reporting a lower level of proficiency.

Table 15: Digital user profile by age.

	Digital User Profile 1	Digital User Profile 2	Digital User Profile 3	Digital User Profile 4	Digital User Profile 5
Ages 18-34	0%	2%	1%	33%	64%
Ages 35-44	0%	2%	2%	29%	67%
Ages 45-54	0%	0%	7%	40%	53%
Ages 55-64	0%	1%	10%	48%	41%
Ages 65-74	0%	2%	21%	52%	26%
Ages 75+	0%	2%	25%	53%	20%

Conclusion

In today's society, robust broadband infrastructure is not a luxury, but a necessity in the modern digital landscape. Results from this survey show the high demand for increased broadband access, speed, and reliability in West Virginia. Respondents want high-speed internet access, but most are not receiving broadband speeds or do not have access to high-speed internet at their location.

Moving forward, this information will inform the state's BEAD and Digital Equity program planning. The policies and initiatives that come from these programs will work to foster widespread broadband accessibility, ensuring that no community is left behind in the quest for a connected and inclusive future. The insights derived from this survey serve as a valuable foundation for informed decision-making, guiding efforts to build a more resilient and equitable digital infrastructure for all.

:

Appendix I: Survey Instrument (English)

West Virginia Broadband Survey

The West Virginia Office of Broadband is conducting a statewide survey to collect information about internet service in West Virginia. Access to reliable high-speed internet is important for education, business, healthcare, and overall quality of life. By participating in this survey, you will help the West Virginia Office of Broadband identify areas that lack adequate internet access and understand the needs of West Virginia communities. The survey is available online at: <https://broadband.wv.gov/survey>.

TPMA, on behalf of the West Virginia Office of Broadband, is excited to conduct the West Virginia Broadband Survey. This survey is voluntary and will take about **10 minutes** to complete. You must **live in West Virginia** and be **18 or older** to participate. You can stop taking the survey at any time. Your individual answers are completely confidential – we will never ask your name – and the information will only be reported as a group. Only TPMA and the West Virginia Office of Broadband will have access to the full data.

By continuing, you agree that TPMA can use your feedback to help understand internet access in the state. If you have any questions about this survey, please contact Erin Brown, TPMA Consultant, at ebrown@tpma-inc.com or 317-759-3612.

Thank you for your participation!

Required Criteria

1. Do you live in West Virginia and are you 18 or older? (**CHECK ONE** BOX)
☐ Yes
☐ No >>> You are not eligible for this survey. Thank you for your time.

Section One: Internet Access

2. Do you have internet access **at home**? (**CHECK ONE** BOX)
☐ Yes >>> Please skip to **Question 5**
☐ No
3. **If you do not have internet at home**, what are the reasons you do not have internet access? (**CHECK ALL** THAT APPLY)
☐ Available internet service is not reliable enough.
☐ Internet service is not available.
☐ Internet service is too expensive.
☐ I do not know how to subscribe to internet service.
☐ I do not want internet service.
☐ I use internet somewhere else.
☐ Other (please specify)

4. **If you do not have internet at home**, are you interested in signing up for high-speed home internet? (**CHECK ONE** BOX)
With high-speed internet, you can:
 - Watch TV and movies online
 - Listen to music online
 - Make video calls, like Zoom.

This information will be used to better understand internet access in West Virginia. Your personal information will not be shared with any internet providers or salespersons.

- ☐
- Yes
-
- ☐
- Yes, but high-speed internet service is not available.
-
- ☐
- No
-
- ☐
- Unsure

If you do not have internet at home, please skip to Question 13 after answering the above question.



5. What type of internet do you currently have at home? (CHECK ALL THAT APPLY)

- ☐ Cable
- ☐ Cellular data plan for a smartphone or other mobile device
- ☐ Dial-up
- ☐ DSL
- ☐ Fiber optic
- ☐ Satellite
- ☐ Some other service (please specify) _____
- ☐ Not sure

6. Who is your home internet provider? (CHECK ALL THAT APPLY)

This information will be used to better understand internet access in West Virginia. Your personal information will not be shared with any internet providers or salespersons.

- | | |
|---|---|
| <input type="checkbox"/> Armstrong | <input type="checkbox"/> SkyPacket |
| <input type="checkbox"/> Arx Web | <input type="checkbox"/> Spruce Knob Seneca Rocks Telephone (SKSRT) |
| <input type="checkbox"/> Blue Devil Cable | <input type="checkbox"/> Starlink |
| <input type="checkbox"/> Breezeline | <input type="checkbox"/> Telegia |
| <input type="checkbox"/> Charter | <input type="checkbox"/> T-Mobile |
| <input type="checkbox"/> Citynet | <input type="checkbox"/> USCellular |
| <input type="checkbox"/> Comcast | <input type="checkbox"/> Verizon |
| <input type="checkbox"/> Community Antenna Services (CAS) | <input type="checkbox"/> Viasat |
| <input type="checkbox"/> Frontier | <input type="checkbox"/> War Telephone |
| <input type="checkbox"/> GigaBeam | <input type="checkbox"/> West Side Telecommunications |
| <input type="checkbox"/> Glo Fiber | <input type="checkbox"/> Other (please specify) _____ |
| <input type="checkbox"/> Hardy Telecommunications | <input type="checkbox"/> Not sure |
| <input type="checkbox"/> HughesNet | |
| <input type="checkbox"/> Lynx | |
| <input type="checkbox"/> MCTV | |
| <input type="checkbox"/> Micrologic | |
| <input type="checkbox"/> Morgan Wireless | |
| <input type="checkbox"/> Optimum (Suddenlink, Altice) | |
| <input type="checkbox"/> Point Broadband | |
| <input type="checkbox"/> Prodigy | |
| <input type="checkbox"/> Shentel | |



7. Overall, how satisfied are you with your internet service provider?
(CHECK ONE BOX)

- ☐ Very satisfied
- ☐ Satisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Dissatisfied
- ☐ Very dissatisfied

8. To what extent do you agree with the following statements? (CIRCLE ONE NUMBER FOR **EACH** ROW)

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
I am satisfied with my current home internet speed.	1	2	3	4	5
I am satisfied with my current home internet reliability.	1	2	3	4	5
My home internet is affordable.	1	2	3	4	5

9. Currently, how much do you pay for home internet service each month? (FILL IN THE BLANK)
\$_____

10. How much more per month would you pay for better home internet?
(FILL IN THE BLANK)
\$_____ per month



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11. Are you interested in getting better internet service than you have now? (CHECK ONE BOX)

- ☐ Yes
☐ No
☐ Unsure

Please explain your response:

12. Please rate how important the following factors are to you when selecting a home internet provider. (CIRCLE ONE NUMBER FOR **EACH** ROW)

	Not at all important	Slightly important	Moderately important	Very important	Extremely important
Faster internet	1	2	3	4	5
Increased reliability of internet	1	2	3	4	5
Less expensive internet	1	2	3	4	5

Please explain your responses:



13. How often do you use the internet (either at home or in other locations)? (CHECK ONE BOX)

- ☐ Almost constantly
- ☐ Several times a day
- ☐ About once a day
- ☐ Several times a week
- ☐ Less than several times a week
- ☐ Never >>> Please skip to **Question 16**

14. Please rate how often you use the internet at the following locations for personal use. (CIRCLE ONE NUMBER FOR **EACH** ROW)

	Never	Rarely	Someti mes	Often
Your home	1	2	3	4
Friend or family member's house	1	2	3	4
Library	1	2	3	4
Parking lot of a business or community organization	1	2	3	4
Place of worship	1	2	3	4
Retail store (such as McDonalds, Taco Bell, Starbucks)	1	2	3	4
School (for <u>personal</u> use)	1	2	3	4
Work (for <u>personal</u> use)	1	2	3	4



15. Which activities do you do on the internet? (CHECK ALL THAT APPLY)

- ☐ Accessing healthcare services (telehealth) or information
- ☐ Email
- ☐ Job searching
- ☐ Online banking or financial transactions (including paying bills)
- ☐ Online classes, education, or e-learning
- ☐ Online gaming
- ☐ Online shopping
- ☐ Reading news or articles
- ☐ Remote work or running a business
- ☐ Social media
- ☐ Streaming videos or movies
- ☐ Video conferencing or online meetings (such as Zoom, FaceTime, or Google Meet)
- ☐ Other (please specify): _____

If you are an internet user, please skip to Question 18 after answering the above question.

16. **If you are not an internet user**, are you interested in increasing your internet knowledge and skills?

- ☐ Yes
- ☐ No
- ☐ Unsure

17. **If you are not an internet user**, what activities would you like to be able to do on the internet? (CHECK ALL THAT APPLY)

- ☐ None
- ☐ Accessing healthcare services (telehealth) or information
- ☐ Email
- ☐ Job searching
- ☐ Online banking or financial transactions (including paying bills)
- ☐ Online classes, education, or e-learning
- ☐ Online gaming
- ☐ Online shopping
- ☐ Reading news or articles
- ☐ Remote work or running a business
- ☐ Social media
- ☐ Streaming videos or movies
- ☐ Video conferencing or online meetings (such as Zoom, FaceTime, or Google Meet)



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☐ Other (please specify): _____

Section Two: Internet-Enabled Device Usage

18. Are there internet-enabled devices available in your household? (For example: smartphones, tablets, laptops, desktop computers, smart TVs, etc.) (**CHECK ONE BOX**)

- ☐ Yes >>> **Please skip to Question 20**
☐ No

19. **If you do not have access to an internet-enabled device**, what are the main reasons? (**CHECK ALL THAT APPLY**)

- ☐ I don't have access to internet where I live.
☐ Privacy concerns
☐ Cost of device is too high
☐ Learning to use the device
☐ Personal preference (not interested in owning one)
☐ Other financial priorities
☐ Other (please specify) _____

If you do not have access to an internet-enabled device, please skip to Question 22 after answering the above question.

20. How many internet-enabled devices are available in your household? (For example: smartphones, tablets, laptops, desktop computers, smart TVs, etc.) (**FILL IN THE BLANK**)

_____ devices

21. What device do you mostly use for accessing the internet at home? (**CHECK ONE BOX**)

- ☐ Desktop computer
☐ Gaming system
☐ Laptop
☐ Tablet
☐ Smartphone
☐ Smart TV
☐ Other (please specify)



22. Please rate the affordability of internet-enabled devices. (For example: smartphones, tablets, laptops, desktop computers, smart TVs, etc.)

(CHECK ONE BOX)

- ☐ Very affordable
- ☐ Somewhat affordable
- ☐ Somewhat unaffordable
- ☐ Very unaffordable

23. Are you aware of any programs that provide free or reduced-price internet-enabled devices, or internet-enabled device loan programs?

(CHECK ONE BOX)

- ☐ Yes
- ☐ No

24. Have you ever used any programs that provide free or reduced-price internet-enabled devices, or internet-enabled device loan programs?

(CHECK ONE BOX)

- ☐ Yes, I have successfully used those programs.
- ☐ Yes, but I faced challenges in using them.
- ☐ No, I am not aware of those programs.
- ☐ No, I have not needed to use those programs.
- ☐ No, I wanted to or tried, but was unsuccessful.

25. Are you familiar with the Affordable Connectivity Program or Lifeline?

(CHECK ONE BOX)

- ☐ Yes
- ☐ No

26. Does your household participate in the Affordable Connectivity Program or Lifeline? (CHECK ONE BOX)

- ☐ Yes
- ☐ No
- ☐ Unsure



Section Three: Digital Usage

27. Here, you will read five short paragraphs. As you read, please think about which one most closely resembles your use of the internet and internet-enabled devices.

After you read all five, please CIRCLE the ONE that best describes you. None of them may match you perfectly, but choose the best option.

1. I never use the internet and I am not interested in increasing my internet use or skills. I prefer more traditional methods of communication, such as phone calls, mail, and face-to-face conversations.
2. I rarely use the internet and find that navigating the internet and social media can be challenging for me. I often need help when using a computer or the internet.
3. I use the internet for limited tasks, such as email and social media. I am comfortable performing the tasks I know how to do, but doing other things online can be challenging for me and I sometimes need help.
4. I use the internet daily for a variety of different tasks, such as email, social media, video streaming/conferencing. I am comfortable with learning tasks and rarely need help.
5. I am a heavy internet user. I use the internet daily for many different tasks, such as gaming, programming, video streaming, email, and social media. I am confident in my ability to troubleshoot technology issues and learn new tasks.

Section Four

Here, we would like to know a little about you for statistical purposes. All of your answers to the survey are strictly confidential. However, we need this information to be able to compare your responses with other West Virginians. We thank you again for completing this survey.

28. What is your location? (FILL IN THE BLANKS)

Entering your street address is optional and will ONLY be used to determine internet speeds around the state. Your zip code is required so we can compare different areas in West Virginia and ensure enough responses from areas that are known to have no internet or slow internet speeds.

Street address: _____

City : _____

Zip code (Required): _____

29. What is your age? (FILL IN THE BLANK)

30. How many people, including yourself, live in your household? (FILL IN THE BLANK)

Number of children (less than 18 years old) _____

Number of adults (18 years old and older) _____

31. What is the highest level of education you have completed? (CHECK ONE BOX)

- ☐ Less than a high school diploma
- ☐ High school diploma or GED
- ☐ Some college, but no degree
- ☐ Associate degree or equivalent
- ☐ Bachelor's degree or equivalent
- ☐ Postgraduate degree (ex. Master's, doctorate, law, or other degree)
- ☐ Prefer not to say



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32. Are you a veteran of the United States Armed Forces? (CHECK **ONE** BOX)

- ☐ Yes
- ☐ No
- ☐ Prefer not to say

33. Do you identify as a person with a disability? (CHECK **ONE** BOX)

- ☐ Yes
- ☐ No
- ☐ Prefer not to say

34. Which of these best describes you? (CHECK **ALL** THAT APPLY)

- ☐ Woman
- ☐ Man
- ☐ Nonbinary
- ☐ Prefer to self-describe: _____
- ☐ Prefer not to say

35. Are you of Hispanic, Latino, or Spanish origin? (CHECK **ONE** BOX)

- ☐ Yes
- ☐ No
- ☐ Prefer to not say

36. What is your race? (CHECK **ALL** THAT APPLY)

- ☐ White
- ☐ Black or African American
- ☐ Asian
- ☐ American Indian or Alaska Native
- ☐ Native Hawaiian or Pacific Islander
- ☐ Other _____
- ☐ Prefer not to say

37. Are you an English Language Learner or do you have difficulty understanding English? (CHECK **ONE** BOX)

- ☐ Yes
- ☐ No



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38. What is your total annual household income? (CHECK ONE BOX)

- ☐ Less than \$10,000
- ☐ \$10,000 – \$14,999
- ☐ \$15,000 – \$24,999
- ☐ \$25,000 – \$34,999
- ☐ \$35,000 – \$49,999
- ☐ \$50,000 – \$74,999
- ☐ \$75,000 – \$99,999
- ☐ \$100,000 – \$149,999
- ☐ \$150,000 – \$199,999
- ☐ More than \$200,000
- ☐ Prefer not to say

39. Do you receive SNAP benefits? (CHECK ONE BOX)

- ☐ Yes
- ☐ No
- ☐ Unsure
- ☐ Prefer not to say

40. Do you live in Charleston, Morgantown, Huntington, Parkersburg, or Wheeling? (CHECK ONE BOX)

- ☐ No
- ☐ Charleston
- ☐ Morgantown
- ☐ Huntington
- ☐ Parkersburg
- ☐ Wheeling

Thank you for your time. In the space below, please feel free to share any additional comments you have.



1900 Kanawha Boulevard, East | Charleston, West Virginia
304-558-2234 | <https://broadband.wv.gov/>

Appendix II: Survey Distribution Kit (English)

TPMA

Distribution Materials for Statewide Broadband Survey

June 28, 2023

Prepared for

**West Virginia Department of Economic
Development**
Office of Broadband



Prepared by





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Introduction

Thank you so much for your willingness to participate in the Statewide Broadband Survey as a distribution partner. This distribution kit is designed to help partners like you understand the purpose of the survey and timeline for distribution.

About the Statewide Broadband Survey

The West Virginia Department of Economic Development, Office of Broadband, is leading a collaborative statewide initiative to expand available, affordable, and reliable broadband connectivity throughout the Mountain State. The Office of Broadband is inviting West Virginia residents to participate in the West Virginia Broadband Survey, a statewide survey of broadband availability, affordability, and use. The survey is related to the Infrastructure Investment and Jobs Act (IIJA), Broadband Equity, Access, and Deployment (BEAD), and Digital Equity Programs, and will directly support West Virginia's BEAD and Digital Equity initiatives.

The West Virginia Broadband Survey is a collaborative effort of partners across the State, including the West Virginia Broadband Enhancement Council, Marshall University Center for Business and Economic Research (MU CBER), West Virginia University, StartUp West Virginia, West Virginia Library Commission, WV Regional Planning and Development Councils, the West Virginia Economic Development Council, and many additional partners who share a commitment to the expansion of broadband in West Virginia.

Target Audience

The Statewide Broadband Survey seeks participation from all residents of West Virginia in any zip code. The State has identified the following zip codes as highly underserved and seek significant participation from these areas:

24739	25320	25951	26416
25276	25411	26201	26651
25312	25427	26241	26704

pg. 2



Quick Links

Tools that are referenced in this document are listed here to help for quick access.

- Home for online survey (English & Spanish versions)
<http://broadband.wv.gov/survey>
- [Printable flyer – English](#)
- [Printable flyer – Spanish](#)
- [QR code](#)
- [Image/banner – English](#)
- [Image/banner – Spanish](#)

Survey Timeline

The survey will open on June 28, 2023 and remain open through Sunday, July 30, 2023.

Survey Distribution

The survey will have two modes of distribution: online through [broadband.wv.gov](http://broadband.wv.gov/survey) and in-person with a paper survey available at all library branches throughout the State of West Virginia

Online Distribution

The online version of the survey lives at <http://broadband.wv.gov/survey>. Participants can select English or Spanish as the survey language.



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Paper Distribution

The paper version of the survey will be available at all public library branches across the State of West Virginia. Participants will be able to select English or Spanish as the survey language.

Special thanks to the West Virginia Library Commission and all public library branches for giving residents across the State the opportunity to access a paper version of the survey, especially during a particularly busy time of year.

Distribution Tools & Resources

Distribution partners are encouraged to use any tools and resources in this section to help promote the survey in their community and networks. Distribution partners are encouraged to think creatively about how to expose the opportunity to potential respondents.

Distribution partners may consider:

- Professional and personal networks
- Common areas in workplaces
- Community gathering places like coffee shops, faith-based communities, etc.
- Social media accounts

Printable Flyer

English and Spanish versions of a small flyer are available here: [English](#) | [Spanish](#).

Some ways to use the flyer include:

- Printing and posting in common areas in workplaces or community gathering places
- As an attachment to an email
- Printing and making available at a booth or display at a conference or public event



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Online Banner

English and Spanish versions of an online banner/image are available here: [English](#) | [Spanish](#)

Some ways to use the banner/image include:

- As an attachment to an email
- Embedded in an email
- As part of a newsletter publication (community bulletin, faith-based newsletter, etc.)
- As part of a social media post

Sample Email Language

Below is sample language to assist with drafting an email, a newsletter announcement, or a verbal announcement.

[Insert Personal Greeting]

This email is to invite you and other West Virginians in your network to participate in a Statewide Broadband Survey that is now live and open through July 30, 2023. Please consider setting aside 10 minutes to take the survey from your home and from your preferred device and internet connection. If you do not have internet access at home or prefer to take it offline, you may visit your local library branch to take a paper version of the survey. The survey is available in both English and Spanish.

Link to online survey: <https://broadband.wv.gov/survey/>

This survey is important because it will help leadership at the State of West Virginia Department of Economic Development's Office of Broadband to collect information that will best position the State for plans to improve broadband access, connectivity, and affordability for all West Virginians. There is a collaborative group of leaders and stakeholders across the State committed to this initiative, and this survey is an important part of their process.

Please share this invitation with your network and encourage your connections in West Virginia to take the survey as well.



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Thank you for taking the time and helping this important initiative reach as many West Virginians as possible.

[Insert Personal Closing]

About the Statewide Broadband Survey

The West Virginia Department of Economic Development, Office of Broadband, is leading a collaborative statewide initiative to expand available, affordable, and reliable broadband connectivity throughout the Mountain State. The Office of Broadband is inviting West Virginia residents to participate in the West Virginia Broadband Survey, a statewide survey of broadband availability, affordability, and use. The survey is related to the Infrastructure Investment and Jobs Act (IIJA), Broadband Equity, Access, and Deployment (BEAD), and Digital Equity Programs, and will directly support West Virginia's BEAD and Digital Equity initiatives.

The West Virginia Broadband Survey is a collaborative effort of partners across the State, including the West Virginia Broadband Enhancement Council, Marshall University Center for Business and Economic Research (MUCBER), West Virginia University, StartUp West Virginia, West Virginia Library Commission, WV Regional Planning and Development Councils, the West Virginia Economic Development Council, and many additional partners who share a commitment to the expansion of broadband in West Virginia.

Sample Newsletter Language

Please consider taking approximately 10 minutes to participate in a Statewide Broadband Survey that is now live and open through July 30, 2023. The survey is to be taken from your home and from your preferred device and internet connection. If you do not have internet access at home or prefer to take it offline, you may visit your local library branch to take a paper version of the survey. The survey is available in both English and Spanish.

This survey is important because it will help leadership at the State of West Virginia Department of Economic Development's Office of Broadband to collect information that will best position the State for plans to improve broadband access, connectivity, and affordability for all West Virginians.

Please visit <https://broadband.wv.gov/survey/>.



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Sample Social Media Language

For all social media posts, please direct people to the online home of the survey: <https://broadband.wv.gov/survey/>.

To increase visibility to followers and your network, consider including the banner image available here: <https://broadband.wv.gov/survey/>.

- *Calling all West Virginians! Please participate in the State's Broadband Survey, designed to take about 10 minutes. The survey will inform the State's broadband strategy to improve internet access, connectivity, and affordability for all West Virginians. Survey closes July 30. Follow the link to take the survey from your home internet connection or visit your local library branch to take a paper version of the survey.*
- *Did you take the State's Broadband Survey yet? It only takes about 10 minutes! Make sure your voice is heard to improve internet access, connectivity, and affordability for all West Virginians. Survey closes July 30. Follow the link to take the survey from your home internet connection or visit your local library branch to take a paper version of the survey.*
- *The Statewide Broadband Survey closes soon! Don't miss your chance to share your thoughts and needs to improve internet access, connectivity, and affordability for all West Virginians. Survey closes July 30. Follow the link to take the 10-minute survey from your home internet connection or visit your local library branch to take a paper version of the survey.*
- *Last call to participate in the Statewide Broadband Survey! The State of West Virginia needs your input to improve internet access, connectivity, and affordability for all West Virginians. Survey closes July 30. Follow the link to take the 10-minute survey from your home internet connection or visit your local library branch to take a paper version of the survey.*



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QR Code

A QR code to drive people to the online version is available [here](#). The QR code is on the printable flyer and can be added to any online or print materials to drive people to the online version.

Tips for Spreading the Word

- **Personalize your outreach!** Think about your audience and why they would want to participate.
- **Schedule follow up emails and posts.** People are busy and often need a reminder.
- **Keep a few flyers with you.** There are so many great places to leave/hang a flyer: government service centers, places of worship, coffee shops and gathering places, children's activities, etc.

Frequently Asked Questions

- **Who is leading this effort?**
This effort is led by the State of West Virginia Department of Economic Development's Office of Broadband.
- **Who is TPMA?**
TPMA is an economic development consulting firm that is partnering with the Office of Broadband to build and distribute the survey and analyze the results.
- **Hasn't there already been a survey? Why another one?**
Yes, several regions of the State have conducted surveys as part of regional efforts to support the Office of Broadband's efforts to seek information and engagement to inform their broadband strategy. This survey is different because it seeks input from all West Virginians across the State in one uniform survey that will be built and analyzed by a professional consulting firm.



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- **Why do people have to take it from their homes?**

The Office of Broadband specifically seeks to understand West Virginians' experiences accessing the internet from their home/residence. Many people access the internet through their employers or public places in part because of difficulty getting affordable, reliable internet access from their home.

The survey also has an option to capture internet speeds through an exercise called a *speed test*, and it is important that any internet speeds captured by the survey are from home locations, not business, public, or other locations.

- **Why is there a paper survey?**

The Office of Broadband and its partners are very concerned about *digital equity*. According to the National Digital Inclusion Alliance, *digital equity* is "a condition in which all individuals and communities have the information technology capacity needed for full participation in our society, democracy, and economy. Digital equity is necessary for civic and cultural participation, employment, lifelong learning, and access to essential services."

Because of the commitment of the Office of Broadband and its partners to digital equity, it was important to provide an option for individuals who needed a paper version of the survey in order to participate for a variety of reasons, including not having an internet-connected device available to them in their home or personal preference.

Special thanks to the West Virginia Library Commission for serving as the partner to distribute paper surveys through local branches throughout the State.

- **When will the survey close?**

The survey will close at 11:59 PM on Sunday, July 30.



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- **Will the results of the survey be public?**
Yes, when the survey report is finalized, it will be publicly available at <http://broadband.wv.gov>.
- **What will be done with the survey results?**
The survey results will be used to inform the Office of Broadband's five-year strategy for broadband development and expansion. The results will support requirements for program and funding opportunities available through the Infrastructure Investment and Jobs Act (IIJA), Broadband Equity, Access, and Deployment (BEAD), and Digital Equity Programs.

Thank You & Key Contacts

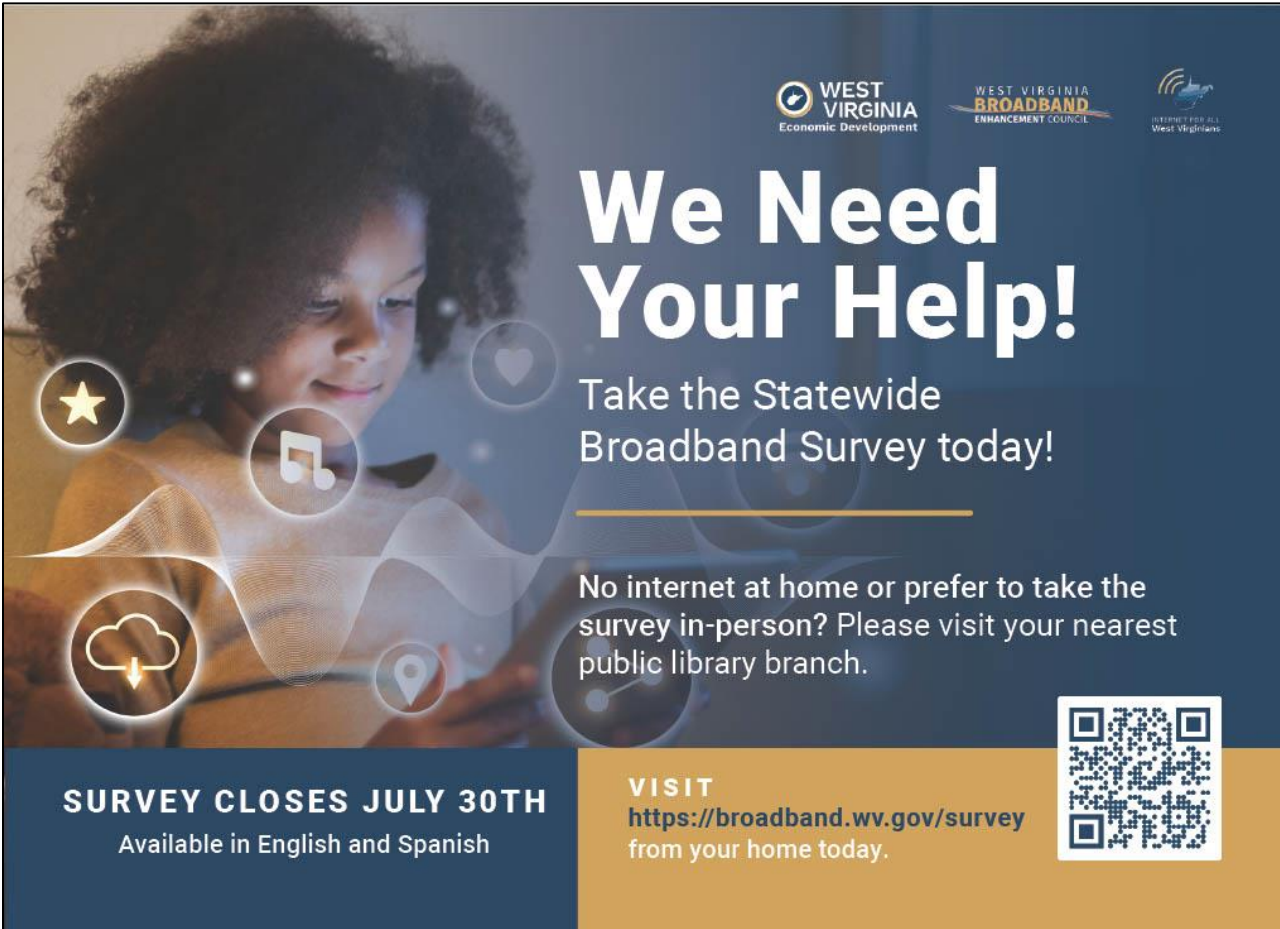
Thank you for agreeing to serve as a distribution partner for the Office of Broadband's Statewide Broadband Survey. Your partnership will ensure as many West Virginians as possible have the opportunity to participate and share their experiences and needs.



Key Contacts

Brian Williams, Program Manager
West Virginia Department of Economic Development
Office of Broadband
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brian.l.williams@wv.gov

Cecilia Harry, CEcD, Director of Economic Development
TPMA
Cell: (719) 888-0919
charry@tpma-inc.com

Appendix III: Postcard Mailer




We Need Your Help!

Take the Statewide Broadband Survey today!

No internet at home or prefer to take the survey in-person? Please visit your nearest public library branch.

SURVEY CLOSING JULY 30TH
Available in English and Spanish

VISIT
<https://broadband.wv.gov/survey>
from your home today.









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Please visit <https://broadband.wv.gov/survey> from your home internet connection by July 30th, the survey will take "approximately" 10 minutes and learn more about West Virginia's efforts around Broadband Equity, Access, and Deployment (BEAD) and Digital Equity Programs.

No home internet connection? Prefer to take the survey in-person?

We've partnered with the West Virginia Library Commission to make paper copies available in all branch locations across the State. Simply visit your local library branch and request a paper copy of the "Statewide Broadband Survey," and staff will help you participate!

#theTPMAway

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