



the state of Internet connectivity in KC

neighborhood-based research findings

Google + **MAYOR'S BI-STATE
INNOVATION TEAM**

presented June 22, 2012





**we want to make the web better –
and that means making it better for everyone.**

as we were getting ready to launch in Kansas City, we wanted
to take a closer look at the state of Internet connectivity
across neighborhoods and demographics in KCK and KCMO.





the task: learn more about KC's Internet connectivity

- how many people in KC use the Internet but don't have broadband?
- how many people in KC don't use the Internet at all?
- why not?
- why should they?
- how can we make a difference?

the methodology: an extensive survey of KC residents

- surveyed 3,219 people over the phone
- asked about use of and attitude toward the Internet
- drew questions from Pew Research's nation-wide survey on Internet connectivity
- disaggregated results by neighborhoods in KCK and KCMO



what we learned:

a lot of people in KC don't get online, even though they believe that Internet connectivity is generally important to their livelihoods.

here's one other thing we learned:

there are lots of inspiring projects on the ground in Kansas City with big dreams that are doing something about it.

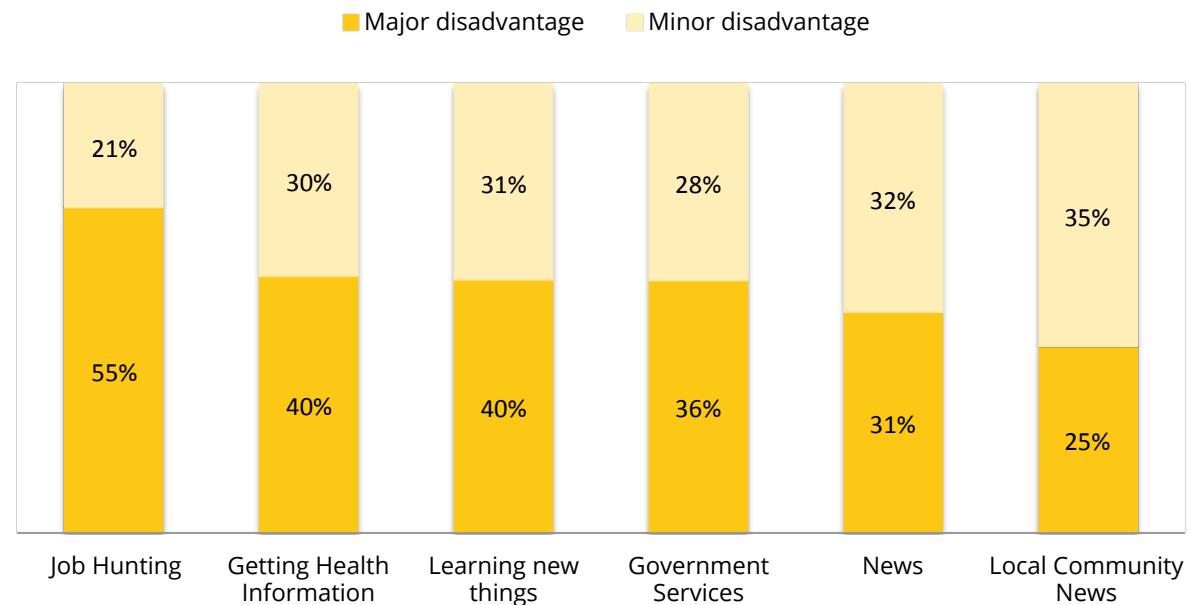
today, we'd like to share some things we've found that might help make their ambitious goals a reality.

let's take a look at **what we found.**

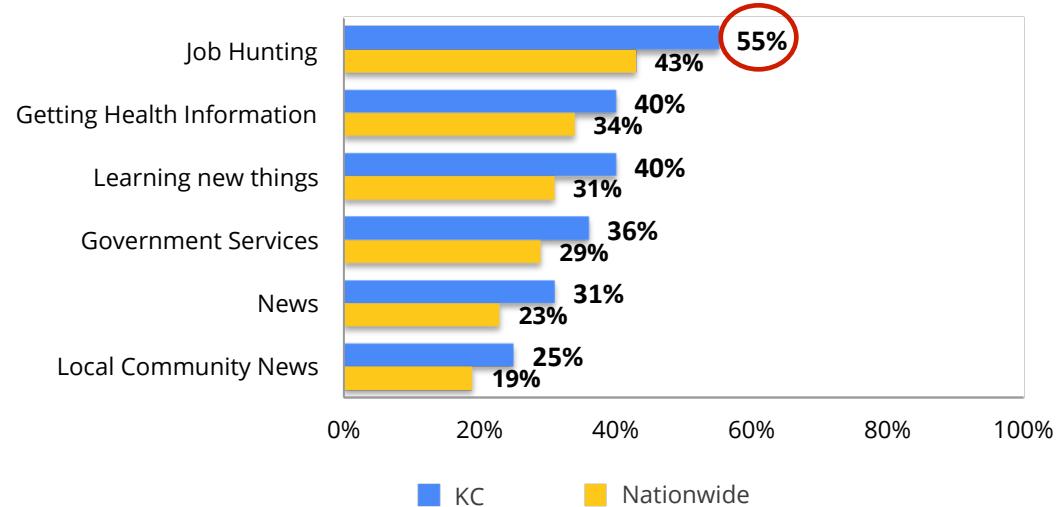
the good news:

the majority of Kansas Citians believe in the power of the Internet to affect livelihoods – from finding jobs to learning new things to enrich their lives.

KC population's perception of disadvantages associated with not using the Internet



KC population's perception of disadvantages associated with not using the Internet as compared to the rest of the US



even better:

KC residents recognize the value of the Internet **even more so than do adults nationwide**, especially when it comes to job-hunting.

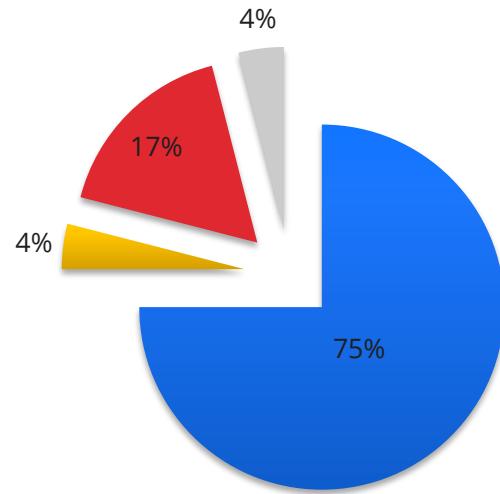
given this widespread conviction in the power of the Internet, these numbers surprised us.

25% of KC doesn't have broadband at home.

Hey, Kansas City!
Do you use the Internet?

■ Yes, I've got broadband ■ Yes, but not broadband

■ No, I don't use the Internet ■ Other

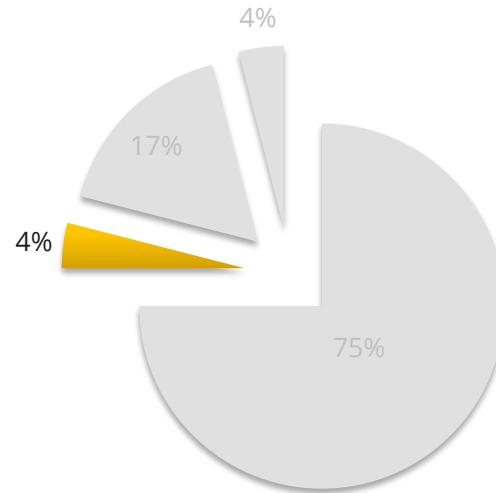


first, let's take a closer look at Internet users without broadband.

this group could benefit a lot from upgrading to broadband.

Hey, Kansas City!
Do you use the Internet?

■ Yes, I've got broadband ■ Yes, but not broadband
■ No, I don't use the Internet ■ Other



first, let's take a closer look at Internet users without broadband.

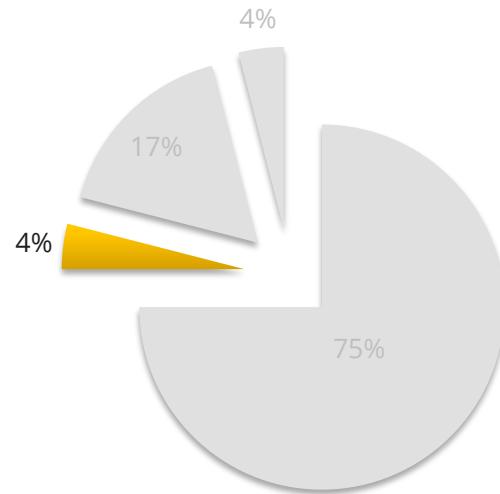
faster speeds mean:

- increased economic development
- more skilled jobs
- higher Internet literacy in general

... and much more

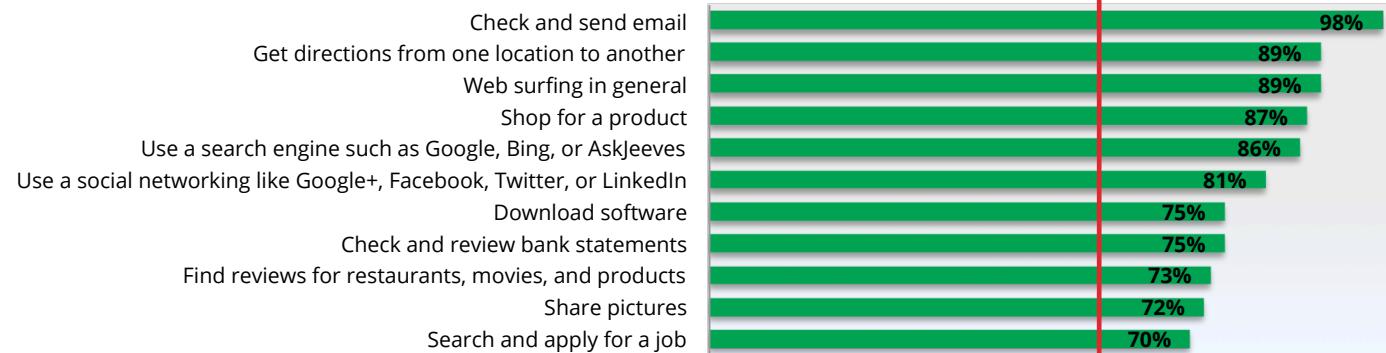
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Do you use the Internet?

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■ No, I don't use the Internet ■ Other



What do you actively do online?

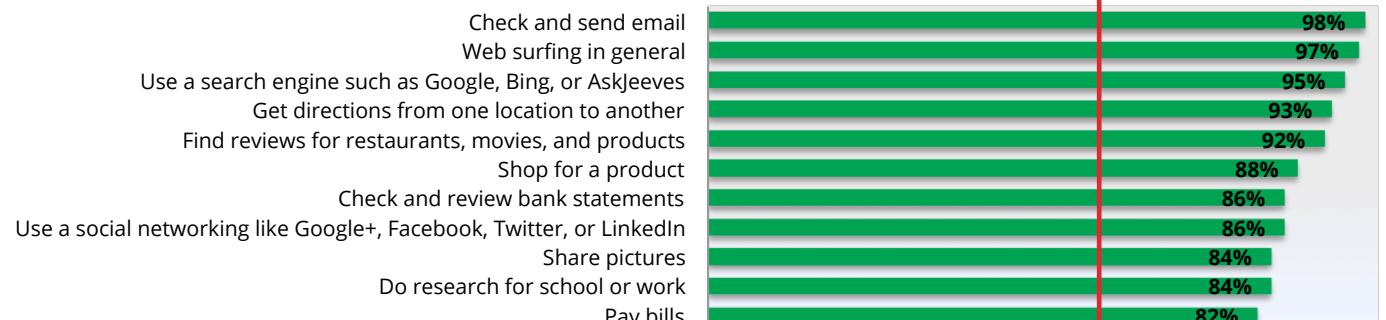
Up to 3 Mbps down



people with faster speeds know how to do more things online and can take advantage of all the Internet has to offer.

What do you actively do online?

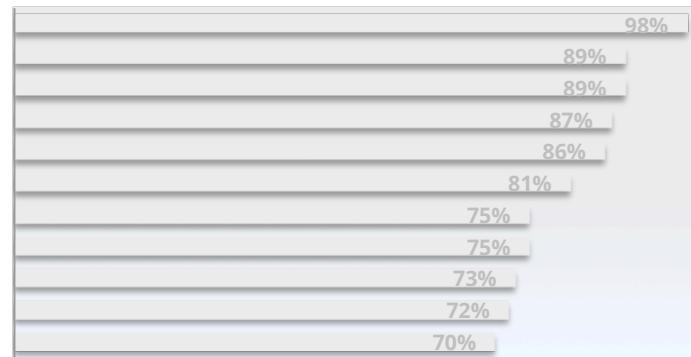
Up to 50 Mbps down



What do you actively do online?

Up to 3 Mbps down

- Check and send email
- Get directions from one location to another
- Web surfing in general
- Shop for a product
- Use a search engine such as Google, Bing, or AskJeeves
- Use a social networking like Google+, Facebook, Twitter, or LinkedIn
- Download software
- Check and review bank statements
- Find reviews for restaurants, movies, and products
- Share pictures
- Search and apply for a job



What do you actively do online?

Up to 50 Mbps down

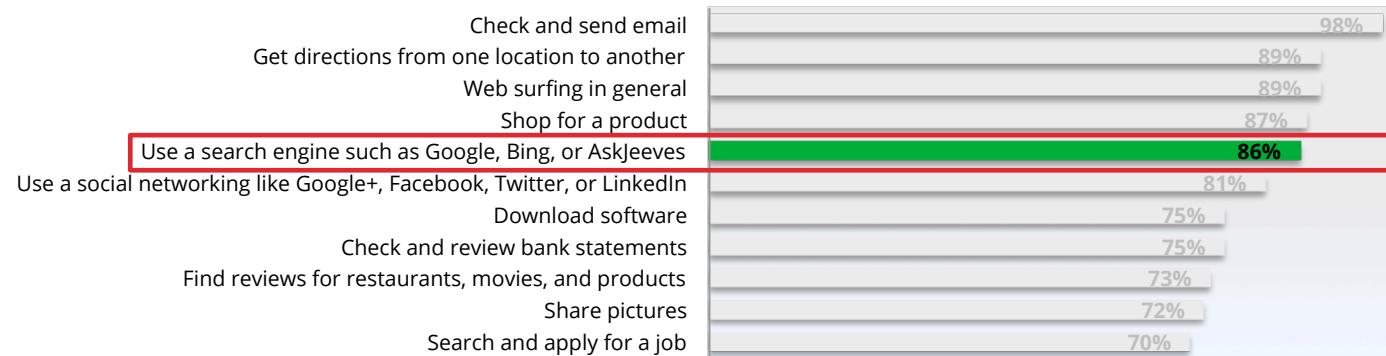
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- Check and review bank statements
- Use a social networking like Google+, Facebook, Twitter, or LinkedIn
- Share pictures
- Do research for school or work
- Pay bills



people with
faster speeds
also do more
“high value”
activities
online.

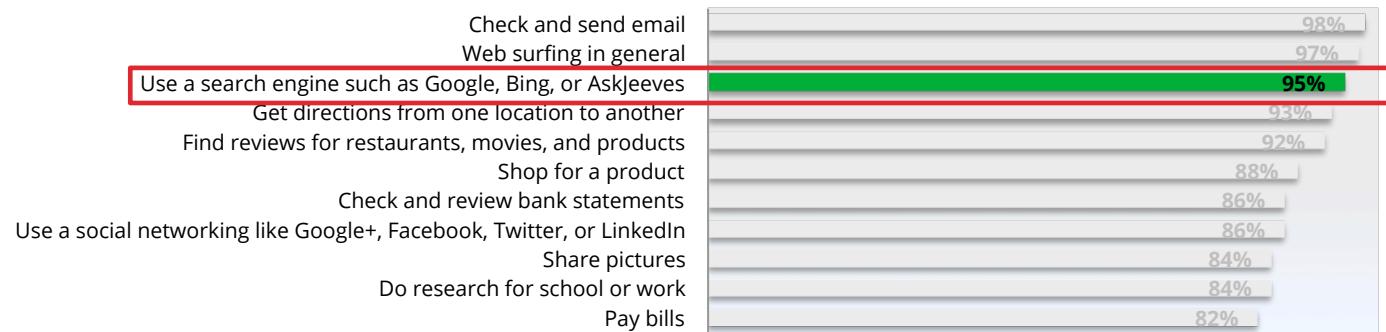
What do you actively do online?

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What do you actively do online?

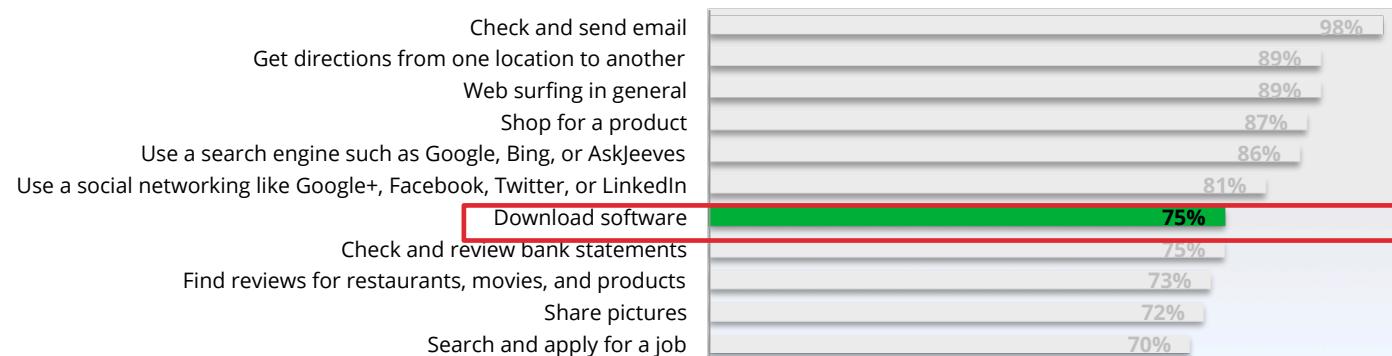
Up to 50 Mbps down



people with faster speeds use a search engine more. since search is a proxy for general online activity, this shows more active Internet use.

What do you actively do online?

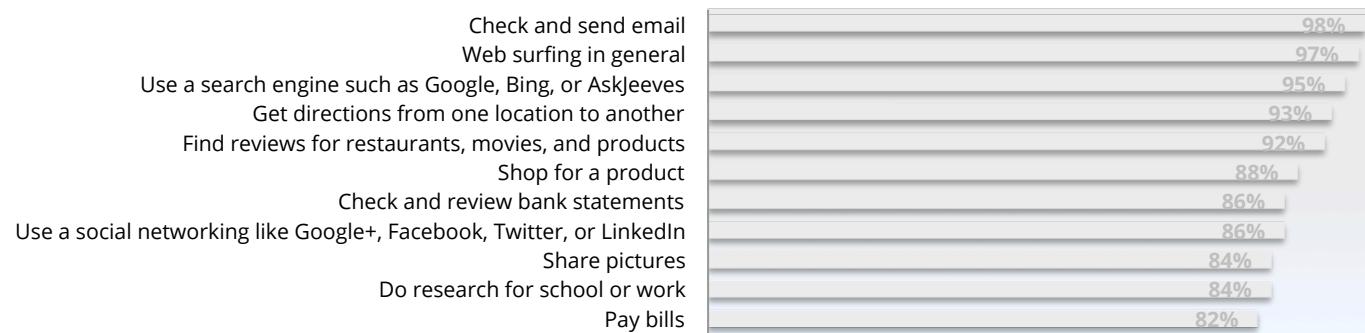
Up to 3 Mbps down



people with faster speeds don't download a software as much as people with slower speeds do. this is probably because they use the cloud.

What do you actively do online?

Up to 50 Mbps down

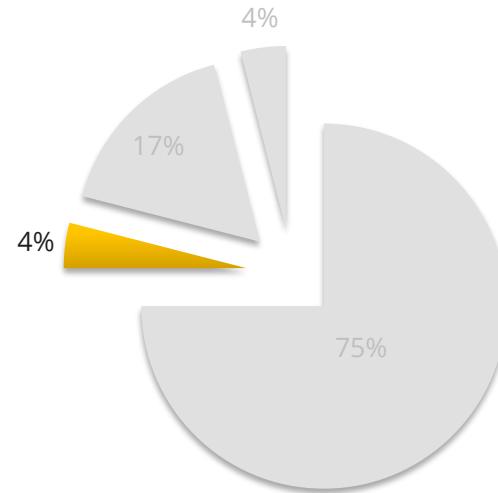


let's take a closer look at Internet users without broadband.

basically, with faster Internet, people can do more meaningful things that can affect their lives.

Hey, Kansas City!
Do you use the Internet?

■ Yes, I've got broadband ■ Yes, but not broadband
■ No, I don't use the Internet ■ Other

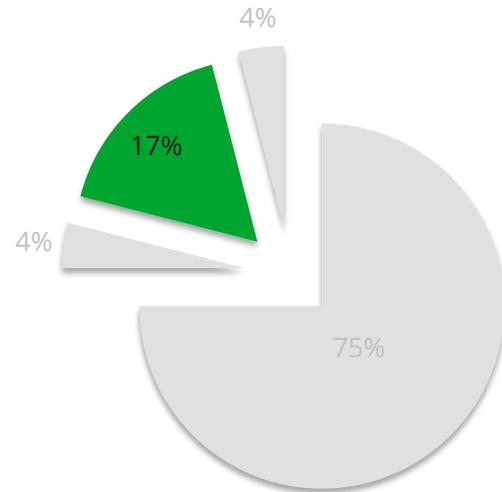


now, let's talk about
people who don't use the
Internet at all.

this number is way too high.

Hey, Kansas City!
Do you use the Internet?

■ Yes, I've got broadband ■ Yes, but not broadband
■ No, I don't use the Internet ■ Other



now, let's talk about
people who don't use the
Internet at all.

of this **17%**,

44% are 65 or older

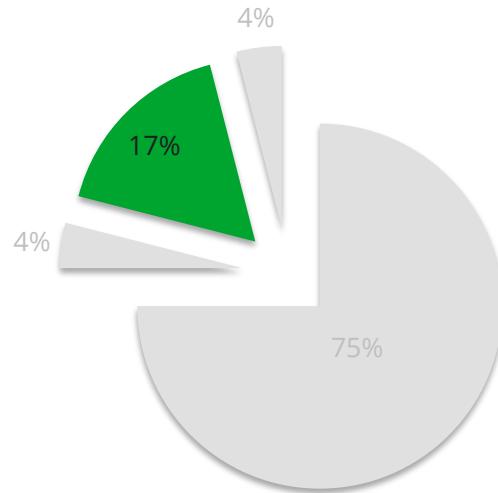
46% are African-American

42% make less than \$25K
a year

64% have only a high
school education or less

Hey, Kansas City!
Do you use the Internet?

■ Yes, I've got broadband □ Yes, but not broadband
■ No, I don't use the Internet ■ Other

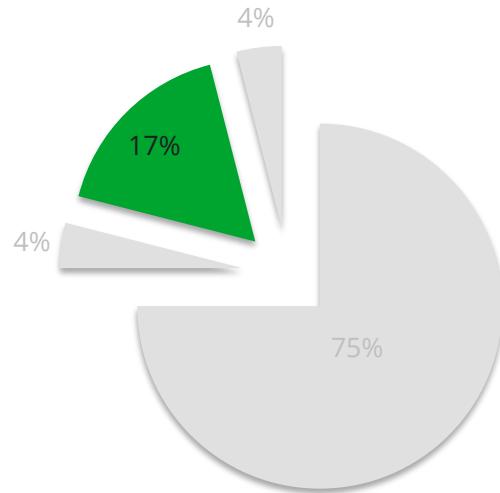


now, let's talk about
people who don't use the
Internet at all.

this number is too high because
in today's society, the Internet
isn't a luxury – it's a staple.

Hey, Kansas City!
Do you use the Internet?

■ Yes, I've got broadband ■ Yes, but not broadband
■ No, I don't use the Internet ■ Other





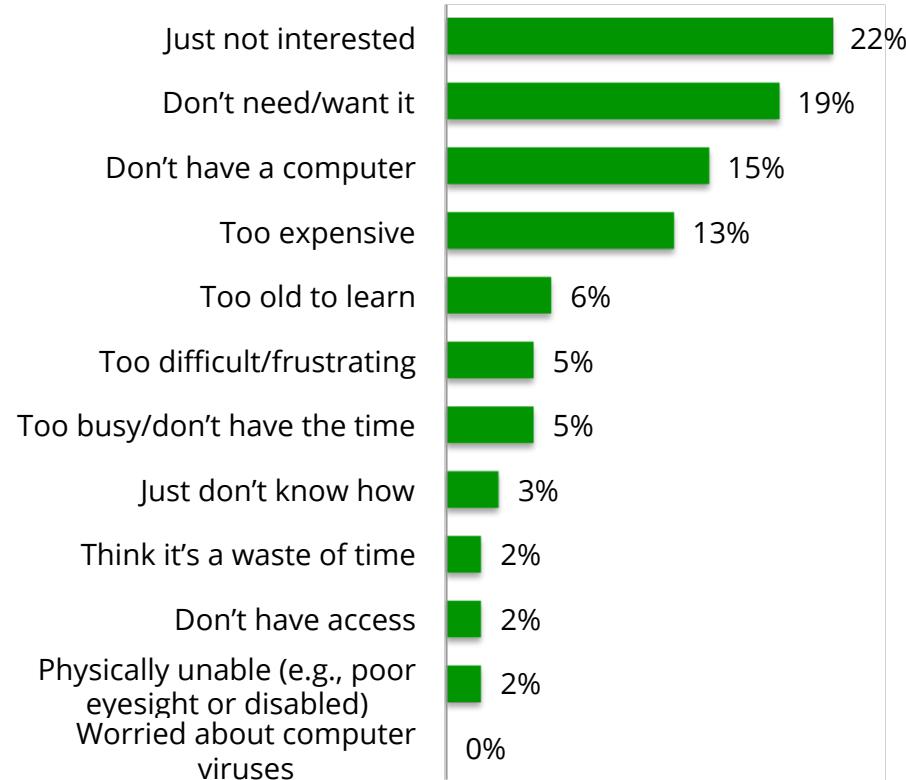
if people believe the Internet is such a vital advantage to
important livelihoods, why doesn't 17% of KC get online?



of the 17% that
doesn't get online:



main reason non-users don't get online

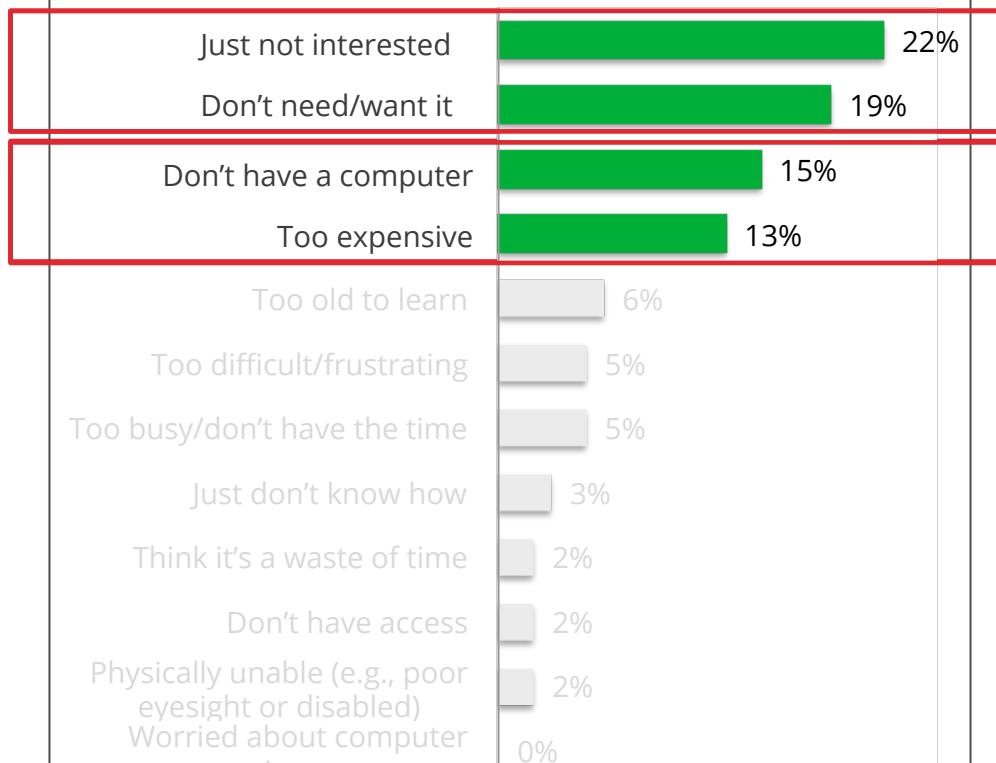


the main reasons non-users don't get online are clustered around two main categories.

of the 17% that
doesn't get online:



main reason non-users don't get online



to sum it up -

"lack of relevance" = 41% of non-users

"lack of access" = 28% of non-users

first, let's take a closer look at **access**.

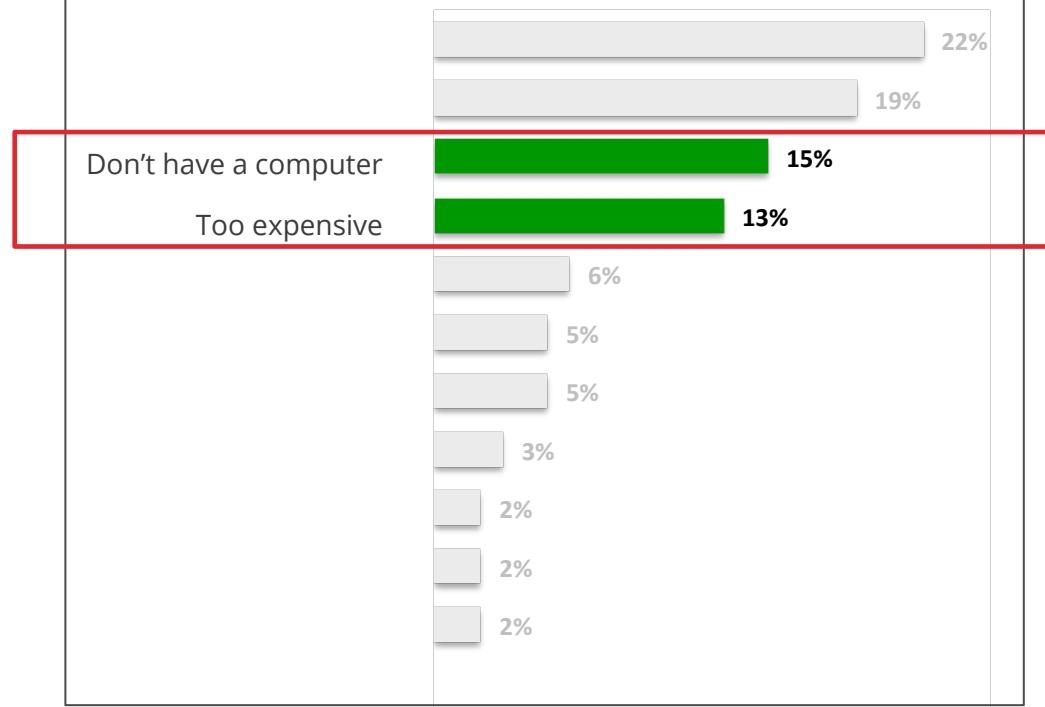
of the **17%** that
doesn't get online:



28% of non-users cite
access as the main
reason they don't get
online.

this suggests that
these non-users **are**
interested in getting
online, but all that
stands in their way is
computer or
affordable Internet
access.

main reason non-users don't get online





these numbers are encouraging.

to get 28% of non-users online, we know that computer access and affordable Internet are necessary parts of the equation.

it will take more than just computer access to get non-users online, of course, but for that 28%,
the interest in the Internet is there.

which brings us to **relevance**.

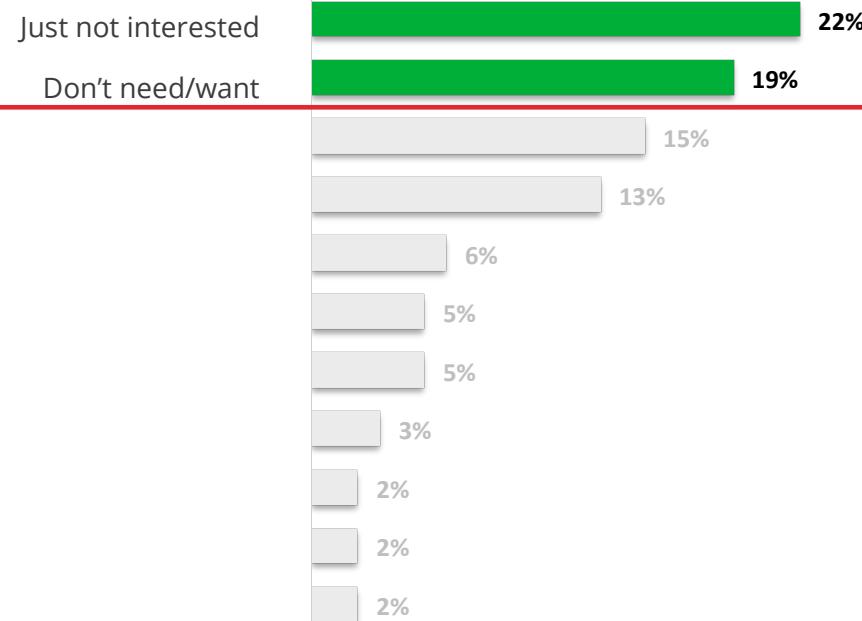
of the **17%** that
doesn't get online:



41% of non-users cite
relevance as the main
reason they don't get
online.

let's dig a little deeper
into this group of
people.

main reason non-users don't get online



For the **41%**

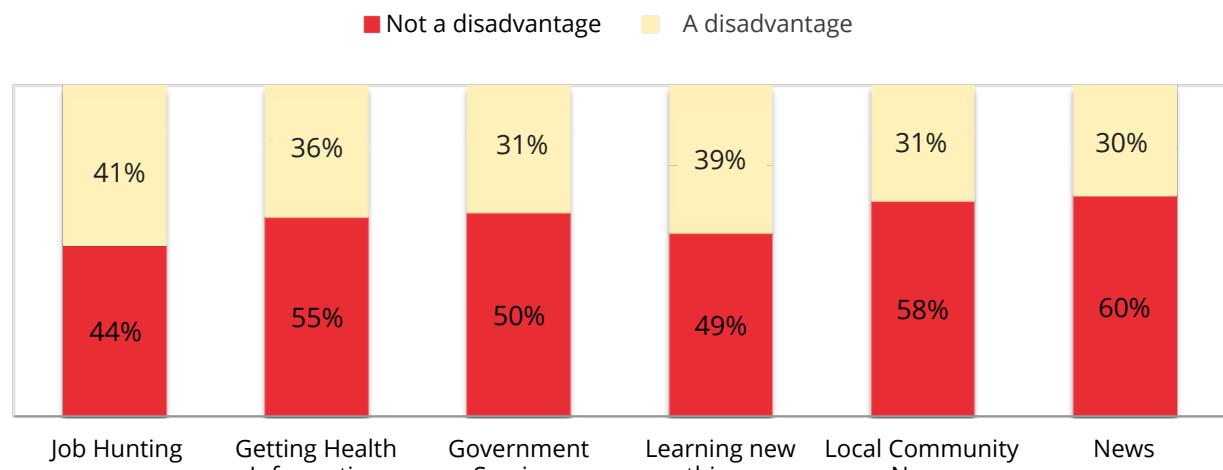
of the **17%** that
doesn't get online:



because of **lack of relevance**:

most of these non-users didn't see using the Internet as an advantage for several key livelihoods, with the possible exception of **job-hunting**.

**non-users citing lack of relevance:
perceived disadvantage of not using the Internet**



for the 41%

of the 17% that
doesn't get online:

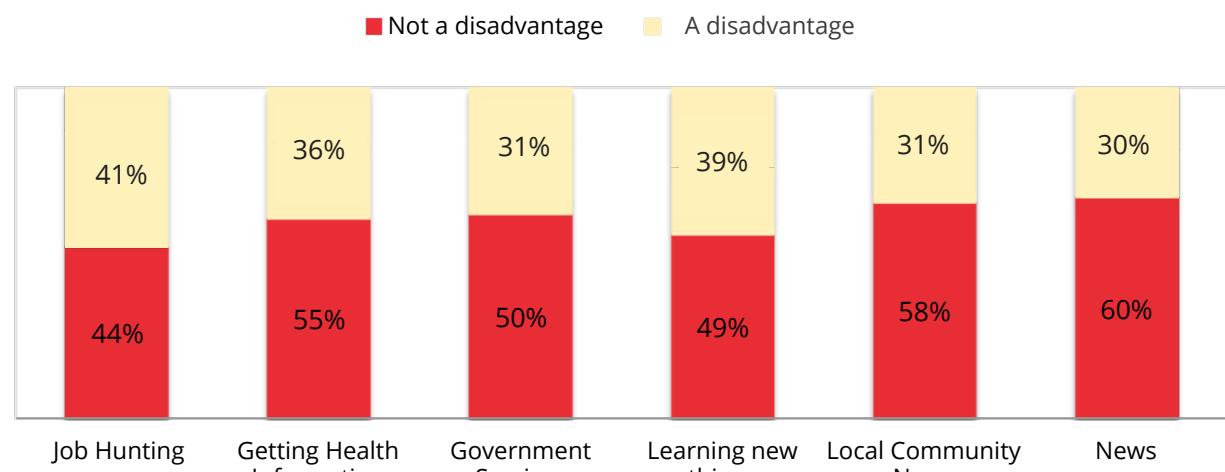


because of **lack of relevance**:

education could partly
be why this group
doesn't perceive an
advantage to getting
online.

when compared to the
rest of non-users, non-
users who cited lack of
relevance as the main
reason for not getting
online were 6% more
likely to have only a
high school education
or less (70% vs. 64%).

non-users citing lack of relevance:
perceived disadvantage of not using the Internet



for the 41%

of the 17% that
doesn't get online:



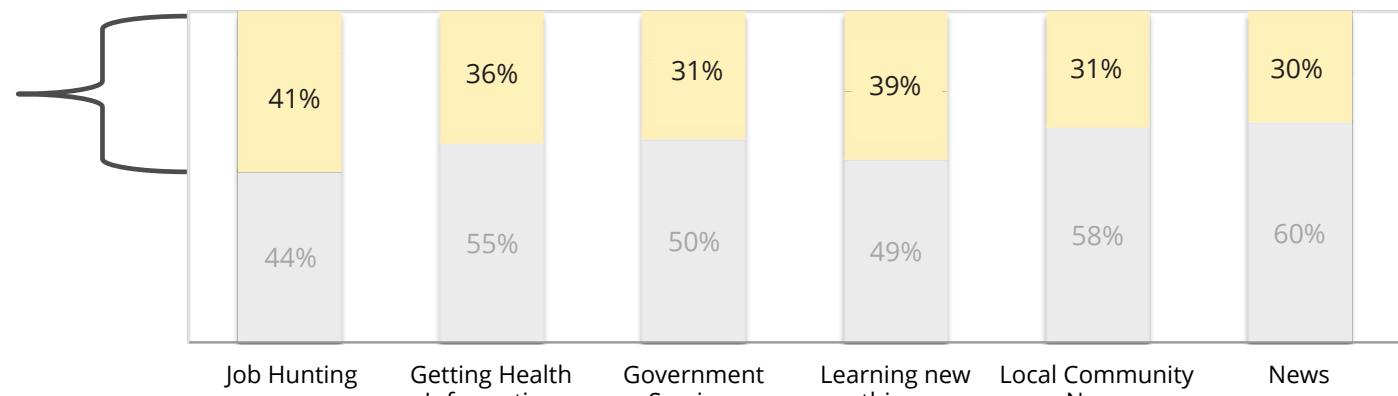
because of **lack of relevance**:

non-users citing lack of relevance:
perceived disadvantage of not using the Internet

■ Not a disadvantage ■ A disadvantage

**let's take a closer
look at this group.**

these users say the
Internet isn't relevant
to them **but they**
also believe the
Internet is generally
an advantage to
livelihoods.



this suggests that this group understands why the Internet is important,
but they haven't internalized that importance to their own personal lives.

To this group, the Internet is still a luxury.

for the 41%

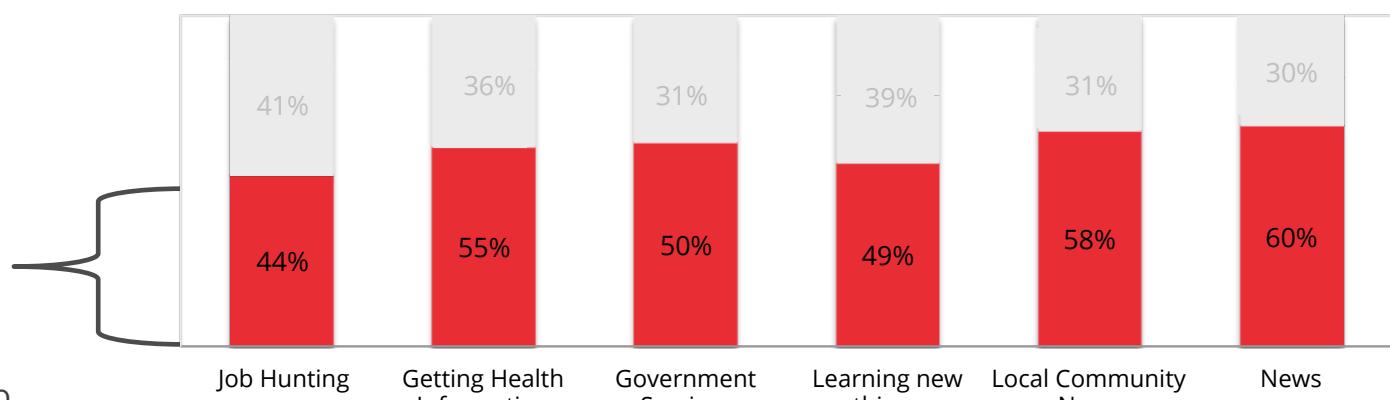
of the 17% that
doesn't get online:



because of **lack of relevance**:

non-users citing lack of relevance:
perceived disadvantage of not using the Internet

■ Not a disadvantage ■ A disadvantage



**now let's take a
look at this group.**

these users say the
Internet isn't relevant to
them **and also** believe
getting online isn't a
significant advantage.

this suggests that this group needs to be convinced of the value of the Internet.
Outreach focusing on them will be harder, so

This group needs to be inspired and shown the Internet's value.



together, these findings suggest

the main reason non-users might not be interested in getting online is that
they don't see the value of the Internet
for their own lives

either because they think of the Internet's advantages abstractly
or because they don't see the advantages at all.



how do we make the Internet relevant to people's lives?

1. easy introduction to the Internet

the Internet is one of those things where the more you use it, the more you see its value. If people don't have computer or Internet access at home, getting online in public spaces should be easy and Internet trainings should be simple and intuitive.

2. clear benefits to pressing needs

the Internet isn't a luxury – these days, it's a staple for livelihoods and constitute a major competitive advantage. people might understand that theoretically, but a real-world application to their own lives will resonate much more.

3. build excitement

show people linkages between the Internet and things they are already passionate about. connect the Internet to what people already value and they'll be more likely to get excited about getting online.



now let's take a closer look at Internet connectivity across **KC neighborhoods**.





we asked each neighborhood in KC about
what matters to people and what they need.

we hope this can be a starting point for how the
community can address the digital divide.



what does KC need?

we've identified five key areas of outreach.

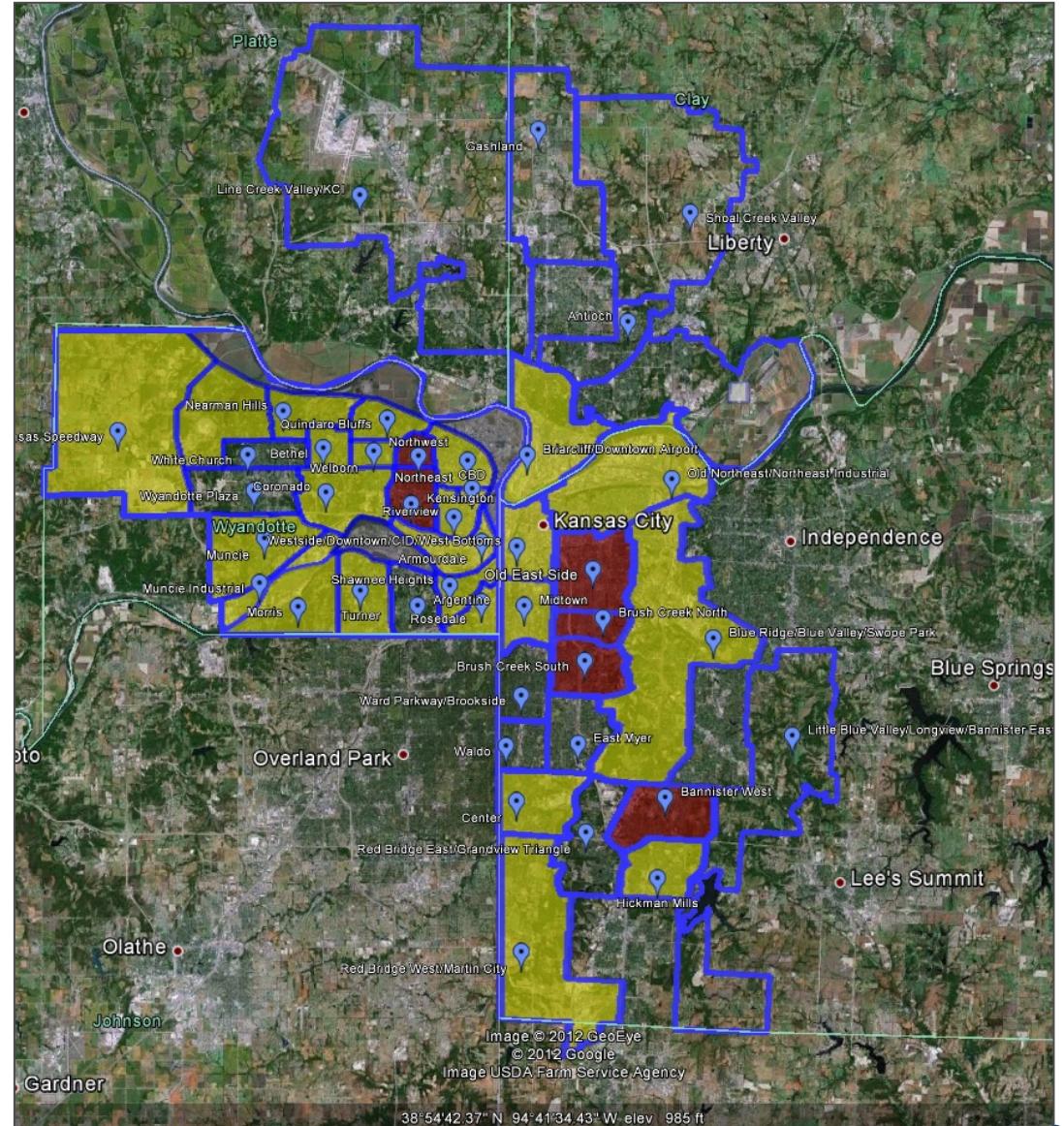
- all non-users who are interested in learning how to get online + need help
- all non-users who are lack a computer or perceive high costs to Internet
- areas with high unemployment + a perception of job search disadvantage for non-users
- all non-user seniors + perception of health information disadvantage for non-users
- school children in non-user homes

all non-users who are interested in getting online + need help

key insights

- significant numbers of non-users indicated interest for learning how to use the Internet and felt that they needed help to learn
- well-suited for general digital literacy outreach
- the less affluent neighborhoods rank highest on the "interested/need help" index.

- some non-user interest/need for help
- high non-user interest/need for help

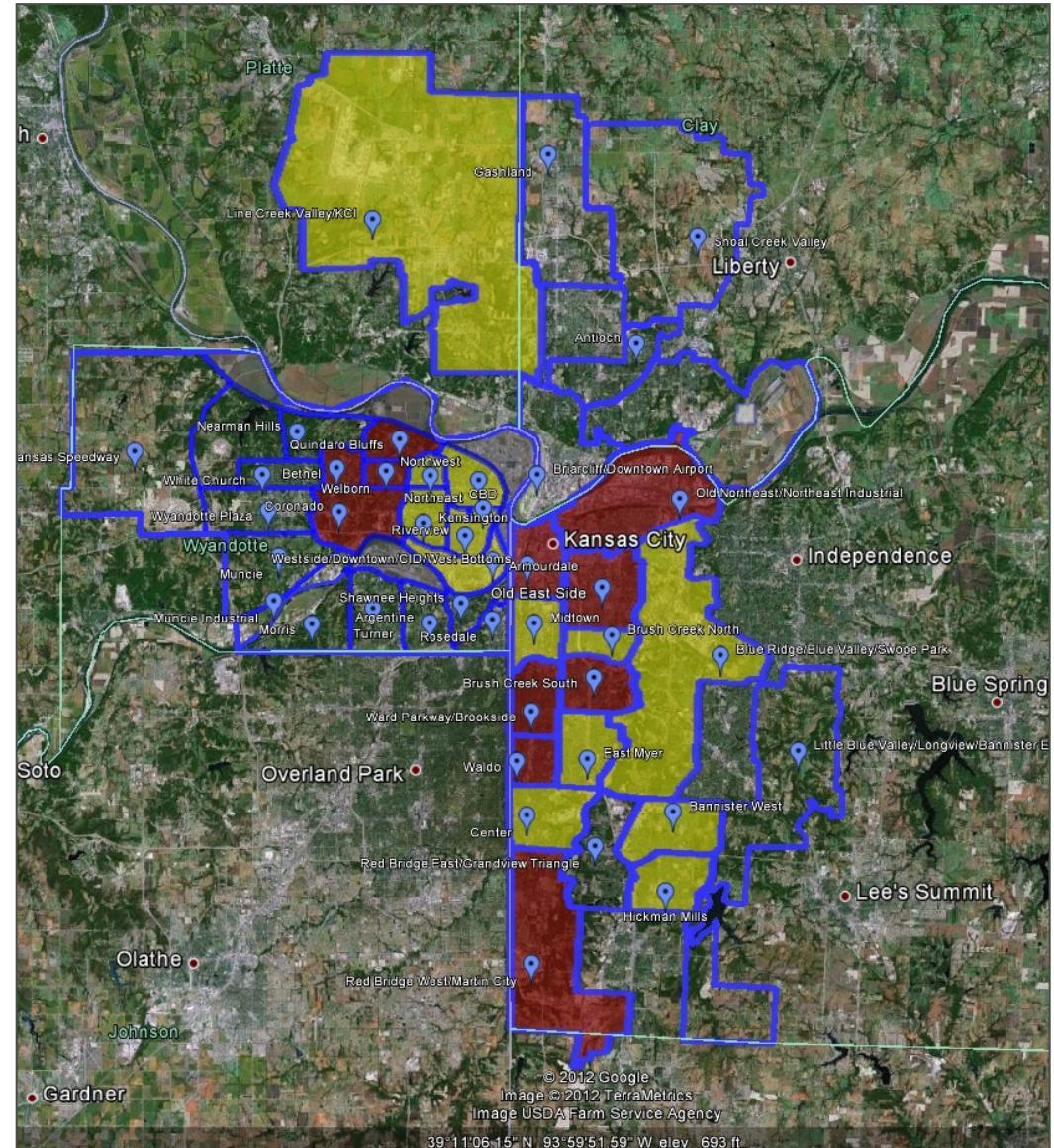


all non-users who lack a computer or perceive high costs to Internet

key insights

- these neighborhoods have the highest percentage of non-users who say that a lack of computers/expense is a major reason they are not online.
- these neighborhoods are not necessarily all low income areas.
- for example, Ward Parkway/Brookside, reported a much older non-user population with lacking a computer as the reason for no Internet exposure.

- some access obstacles for non-users
- definite access obstacles for non-users

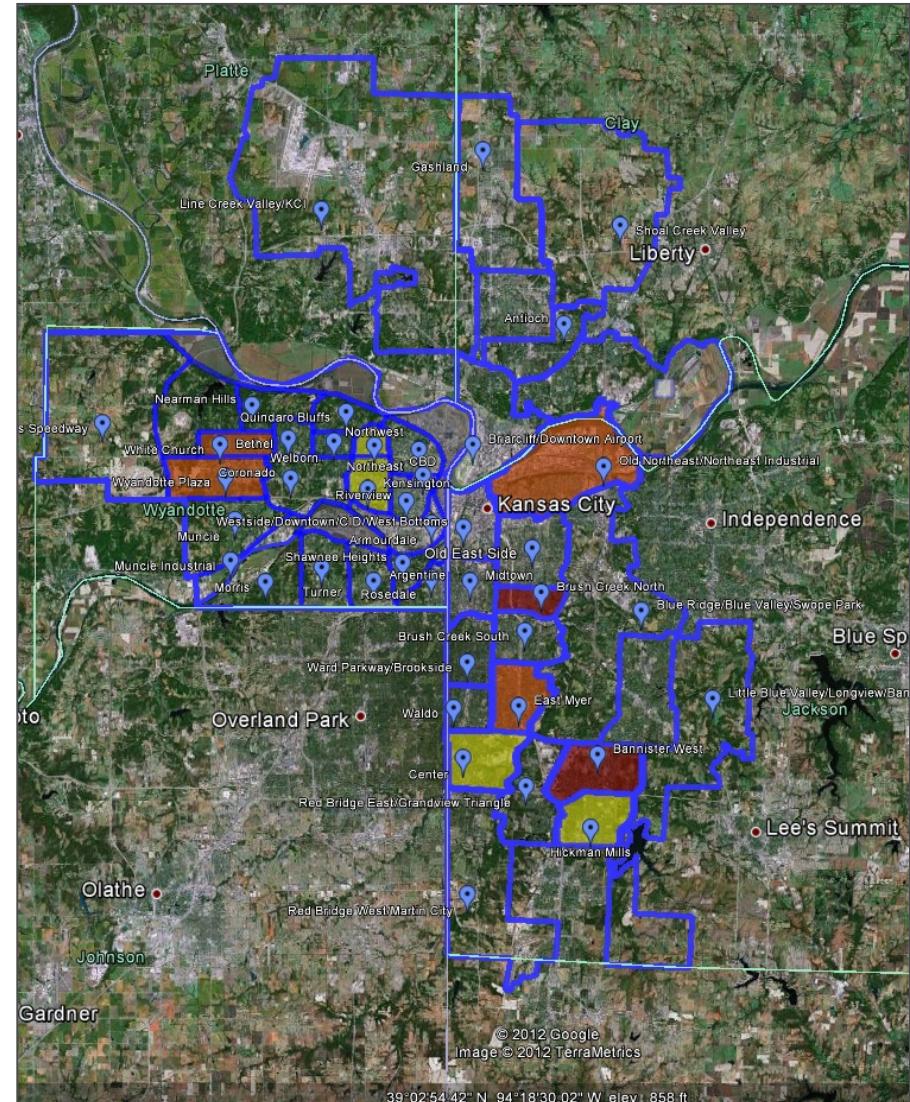


areas with high unemployment + a perception of job search disadvantage for non-users

key insights

- overlaid areas where unemployment was over 15% with neighborhoods with areas where 65% or more people perceived non-users to be at a major disadvantage in job hunting
- well-suited for digital outreach focused on career skills and job hunting

- high unemployment
- high perceived disadvantage in job searching
- both high unemployment + high perceived disadvantage in job searching

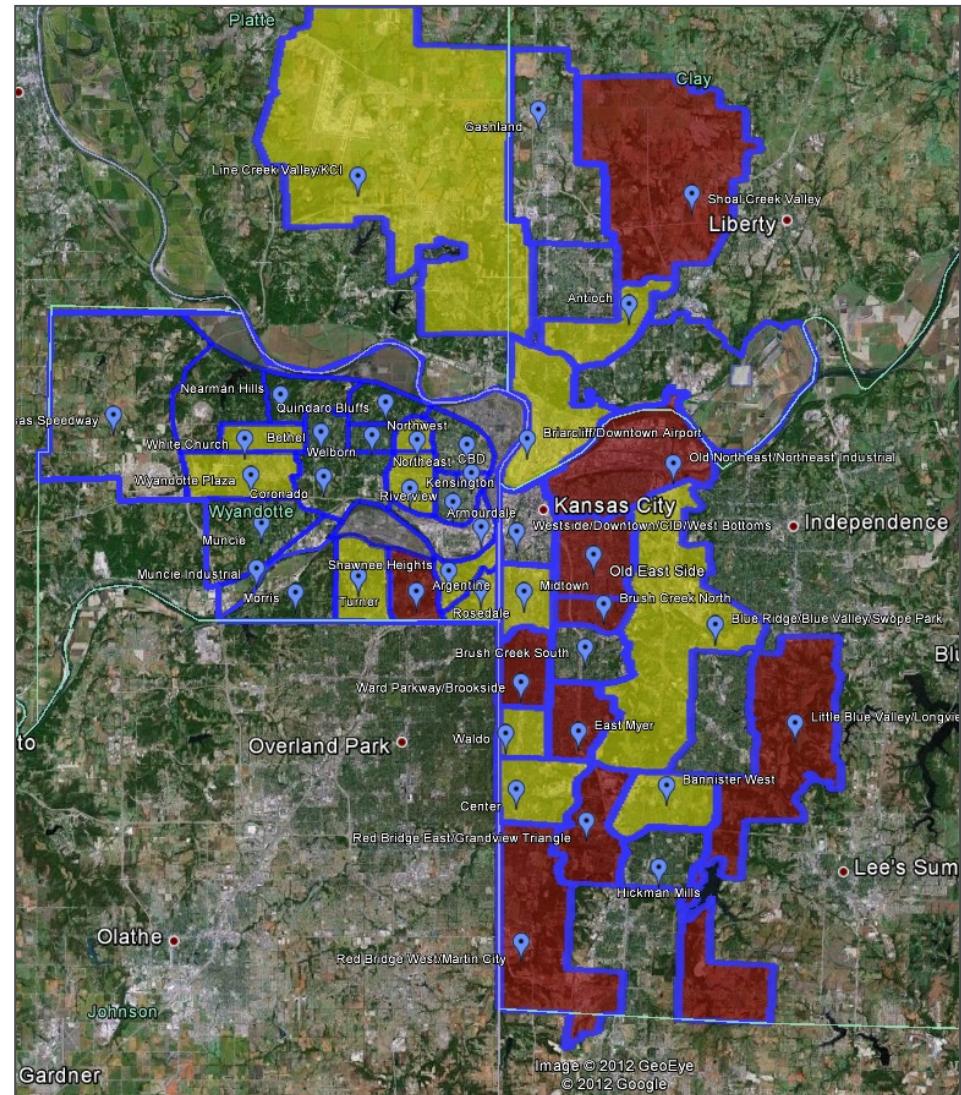


all non-user seniors + perception of health information disadvantage for non-users

key insights

- high concentrations of non-user seniors where a lack of the Internet is perceived as a major disadvantage for getting access to health information
- well-suited for digital literacy outreach focused on getting better information about health-related topics

- medium concentration of non-user seniors + some perceived health disadvantage for non-users
- high concentration of non-user seniors + higher perceived health disadvantage for non-users

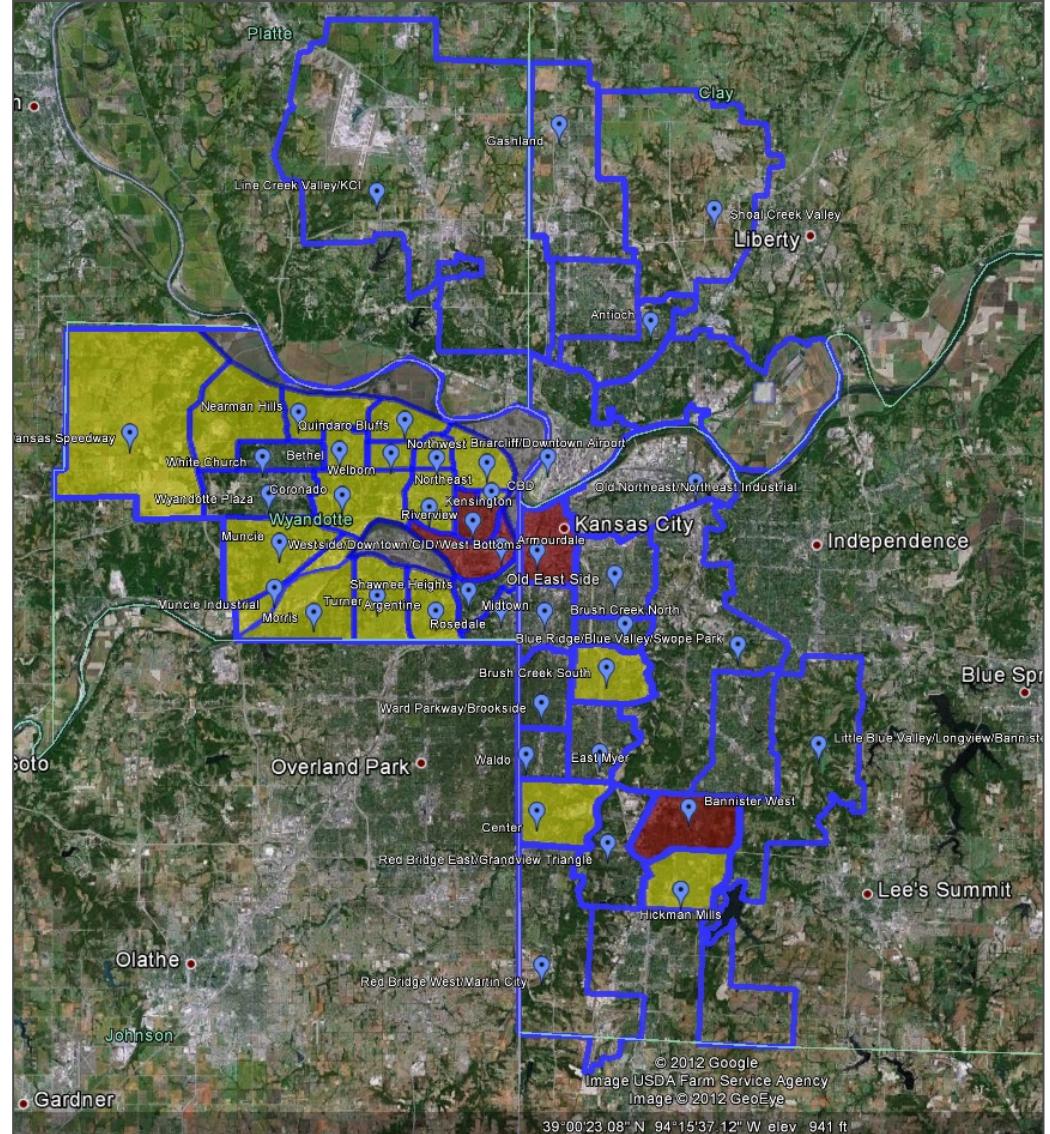


school-aged children in non-user homes

key insights

- high concentrations of school aged children (4-18 years old) living in homes that do not use the Internet
- well-suited for school outreach program

- medium concentration of school-aged children in non-user homes
- high concentration of school-aged children in non-user homes



here you can see the data for key concerns by neighborhood.

neighborhood	key concerns
Argentine	Seniors/Health Information Disadvantage
Armourdale/Riverview	School Children in Non-User Homes
Bethel/Coronado/Quindaro Bluffs/Welborn	Computer/Technology Expense
Brush Creek North	Interested/Need Help
	Unemployment/Non-User Job Search Disadvantage
	Seniors/Health Information Disadvantage
Brush Creek South	Interested/Need Help
	Computer/Technology Expense
Bannister West	Interested/Need Help
	Unemployment/Non-User Job Search Disadvantage
	School Children in Non-User Homes
East Meyer	Seniors/Health Information Disadvantage

key concerns
for each
neighborhood

neighborhood	key concerns
Little Blue Valley/Longview/ Bannister East	Seniors/Health Information Disadvantage
Old East Side	Interested/Need Help
	Computer/Technology Expense
Old Northeast/Northeast Industrial	Seniors/Health Information Disadvantage
	Computer/Technology Expense
Red Bridge East/Grandview Triangle	Seniors/Health Information Disadvantage
Red Bridge West/Martin City	Computer/Technology Expense
	Seniors/Health Information Disadvantage
Shoal Creek Valley	Seniors/Health Information Disadvantage
Waldo	Seniors/Health Information Disadvantage
Ward Parkway/Brookside	Computer/Technology Expense
	Seniors/Health Information Disadvantage
Westside/Downtown/CID/West Bottoms	School Children in Non-User Homes
	Computer/Technology Expense

let's wrap up.



to conclude, let's return to the original task: learn more about KC's Internet connectivity

Q: how many people in KC use the Internet but don't have broadband?

A: 8%. we want to get more people to upgrade from dial-up to broadband- higher speeds mean higher Internet literacy and are better for society as a whole.

Q: how many don't use the Internet at all?

A: 17%. this group generally makes less than \$25K, is elderly, is African-American, and has a high school education or less.

Q: why not?

A: 41% of non-users cite a lack of relevance ("just not interested/don't need it"), and 28% cite a lack of access ("don't have a computer/too expensive").

Q: why should they?

A: these days, the Internet isn't a luxury- it's a staple. getting online is important for livelihoods and staying competitive. Internet users understand that, and even non-users see the advantage of the Internet when it comes to looking for jobs.

Q: how can we make a difference?

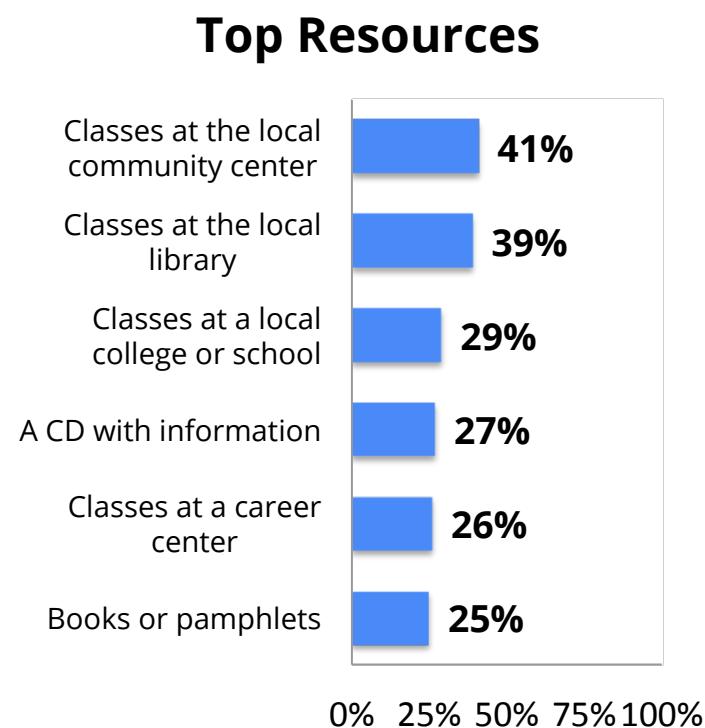
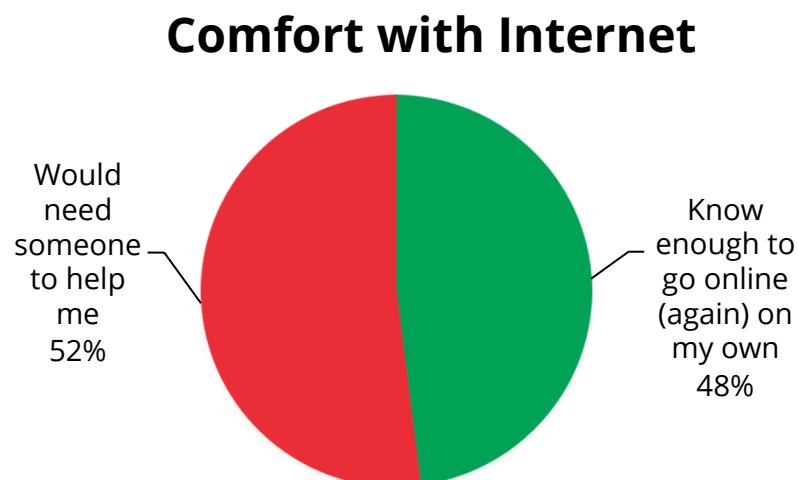
A: provide computer access, make it easy to get online, present personally relevant benefits of the Internet, and excite non-users with linkages between the Internet and their passions .

end

appendices

appendix a: non-users needing help

A little more than half of KC adults who are interested in using the Internet again indicate they would need someone to help them. Classes at the local community center or library would be the best way to help these individuals.



appendix b: non-user demographics

Age		
	KC Overall	Non-Users
18-24	10%	2%
25-34	20%	7%
35-44	20%	10%
45-54	18%	15%
55-64	15%	19%
65-74	8%	17%
75+	7%	27%

Ethnicity		
	KC Overall	Non-Users
White	59%	35%
Hispanic	9%	8%
African American	26%	46%

Education		
	KC Overall	Non-Users
High School or less	31%	64%
Some College	25%	20%
College or more	41%	11%

Gender		
	KC Overall	Non-Users
Men	48%	47%
Women	52%	53%

Income		
	KC Overall	Non-Users
Less than \$25K	19%	42%
\$25-\$50K	23%	21%
\$50-\$75K	17%	9%
\$75-\$100K	14%	3%
\$100K+	15%	4%