



ZENCITY TEMPERATURE CHECK REPORT

# Internet Access

Prepared for Augusta County, VA

# Introduction

The following report provides a review and insights on residents' concerns and priorities related to internet access. The report comprises an analysis of resident responses to a sustainability survey designed by Zencity and deployed by Augusta County. The survey was conducted between July 1 and July 18, 2021, and received 1,612 responses. It included 14 closed-ended and 1 open-ended question.

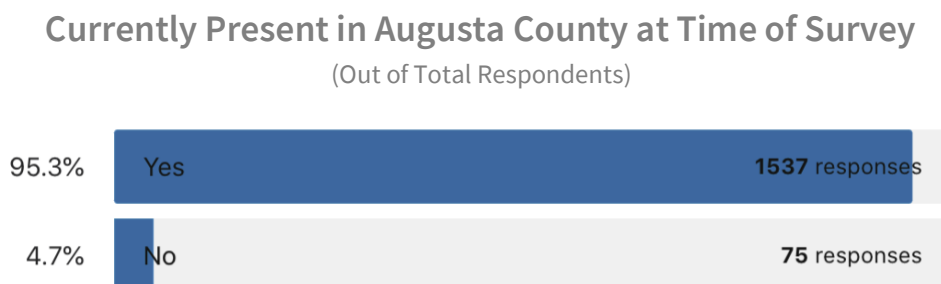
The following analysis includes: Results of each closed-ended question; Results of the open-ended question; Related social media discourse analysis; Main takeaways and recommendations

## Executive Summary

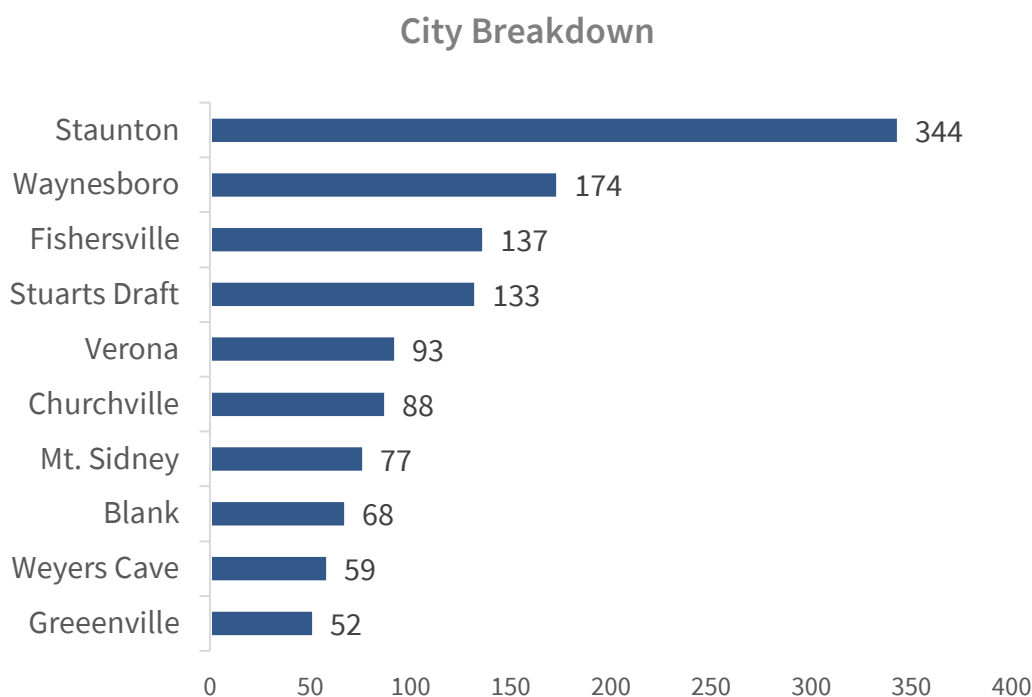
- Respondents assigned an overwhelmingly high degree of importance to internet access and cited its importance for communication, education, and entertainment.
- Lack of available internet services in some regions of the County appeared recurrently in the responses.
- Overall, most respondents are dissatisfied with both their internet speed and their provider's service — both of which were identified as being negatively affected by geographic constraints.
- Respondents also pointed to prohibitive service costs as being a significant barrier.
- In addition to pushing for overall expanded access to internet services, respondents suggested that the County invest in physical infrastructure for internet access — including fiber-optic cables — and promote competition among service providers.

# Demographics

95.3% of the respondents were present in Augusta County at the time of the survey.

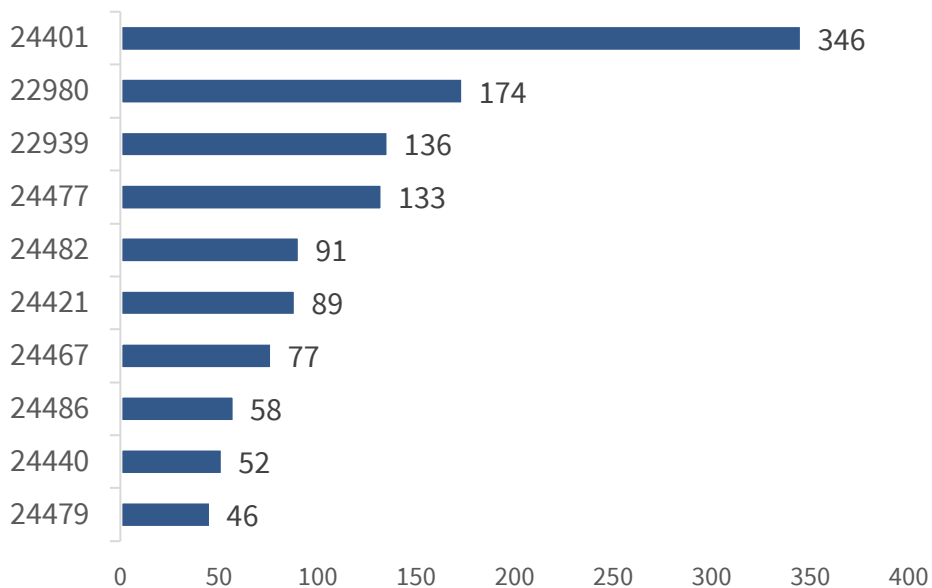


The analysis below and in all following sections **excludes the responses of non-county stakeholders** (i.e., those that responded “No” in the previous question).



**More than three-quarters (80%) of respondents self-identified as being in one of the ten cities listed above**, with Staunton (344 responses) receiving the most responses and nearly 2x more than the second-leading city.

### ZIP Code Breakdown



Similarly, **the top-ten ZIP codes accounted for more than three-quarters (78%) of respondents**, with 24401 receiving the most responses (346).

### Type of Location



**The overwhelming majority (96%) of respondents permanently reside in Augusta County**, 11% of which have a home-based business.

## RESULTS ANALYSIS

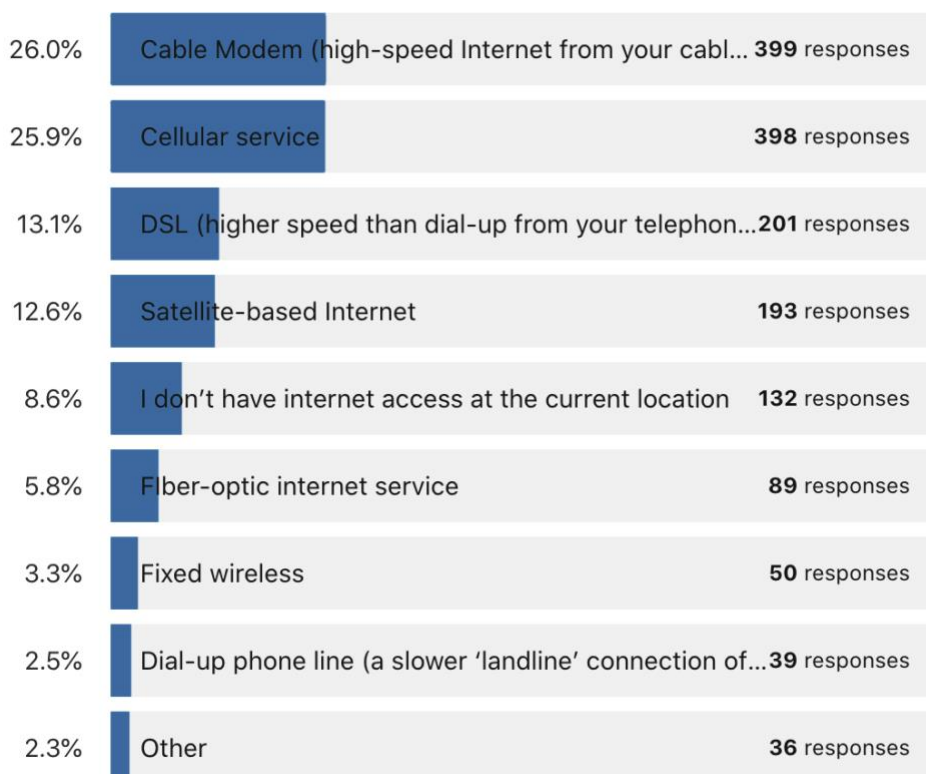
# Closed-Ended Questions Analysis

### 1 Do you work from home?



**Less than half (42%) of respondents** reported currently working from home.

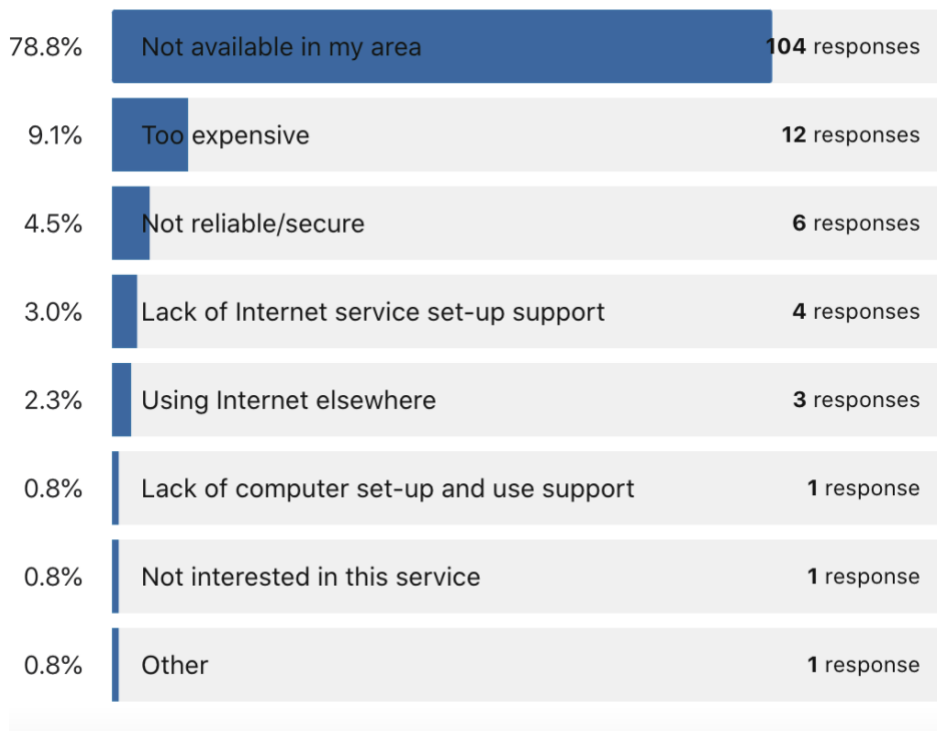
### 2 How do you access the internet at your current location?



**A majority of respondents (52%) access the internet from either a cable modem or via their cellular service.** Another 28% access the internet from lower speed options, such as DSL, satellite-based internet, and dial-up phone lines.

2.1

What is preventing you/your workplace from having internet connection?

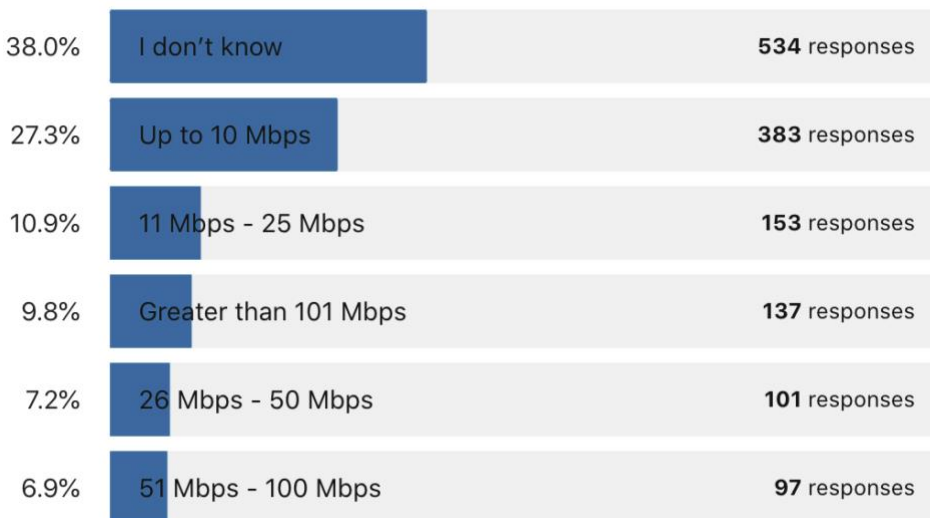


Of the 132 respondents in Q2 who responded that they don't have internet access at their current location, **more than three-quarters (79%) answered that they are limited because internet is available in their area.**

*The following sections only include answers from the 1,405 respondents in Q2 who indicated that they had some form of internet service.*

3

What is the speed of your internet connection?



More than a third (38%) of respondents were unsure of the speed of their internet connection and another 27% had the slowest available speed (up to 10 megabytes per second). **Less than a quarter (24%) of respondents had access to internet speeds greater than 25 mbps** — the minimum speed recommended by the Federal Communications Commission for multi-user households with high use of the internet.<sup>1</sup>

4

How satisfied are you with the current speed of connection?



**Nearly two-thirds (62%) of respondents reported some degree of dissatisfaction** with the current speed of their internet connection, while only 16% reported feeling “very satisfied.”

<sup>1</sup> <https://www.fcc.gov/consumers/guides/household-broadband-guide>

4.1

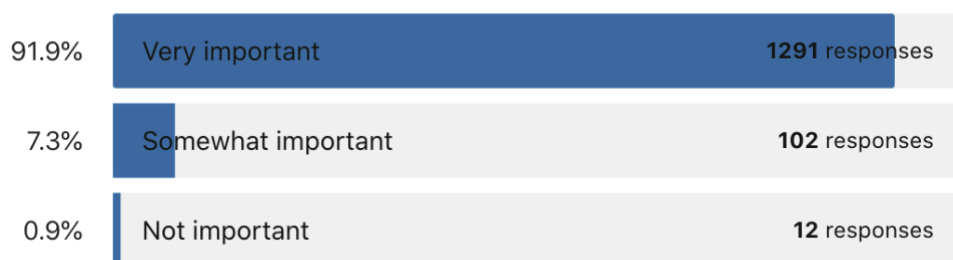
What is the reason you/your workplace don't have a stronger internet connection?



Of the 1,180 respondents in Q4 who did not report feeling “very satisfied” with their current internet connection speed, **nearly three-quarters (71%) cited the lack of stronger internet availability in their area.** Another 20% cited cost as the main impediment.

5

How important is internet access to you/your workplace?

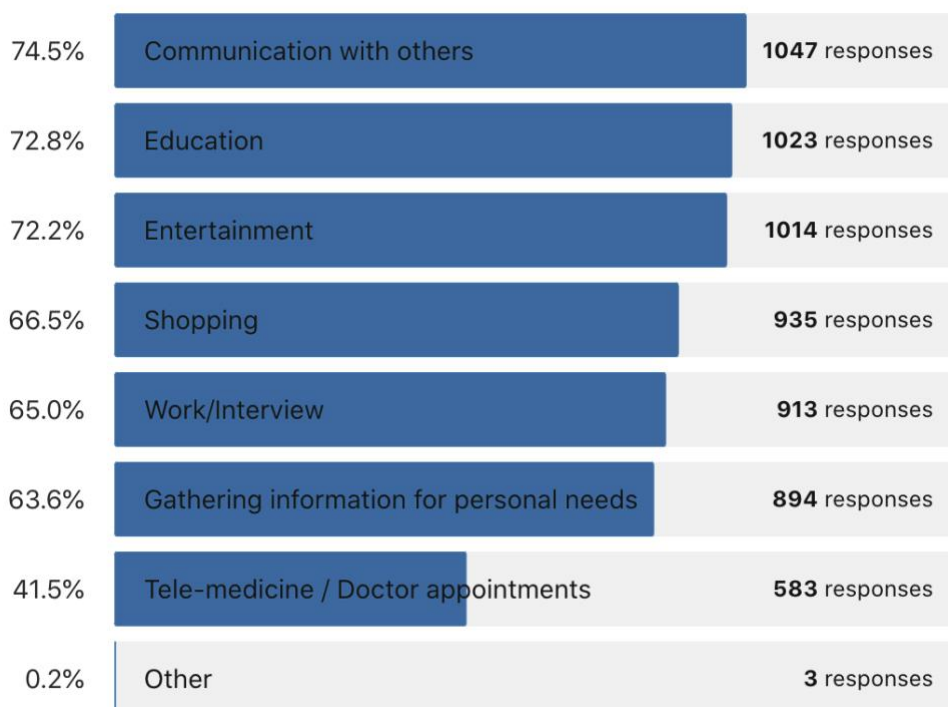


**Virtually all (99%) respondents assigned some degree of importance** to having internet access.



6

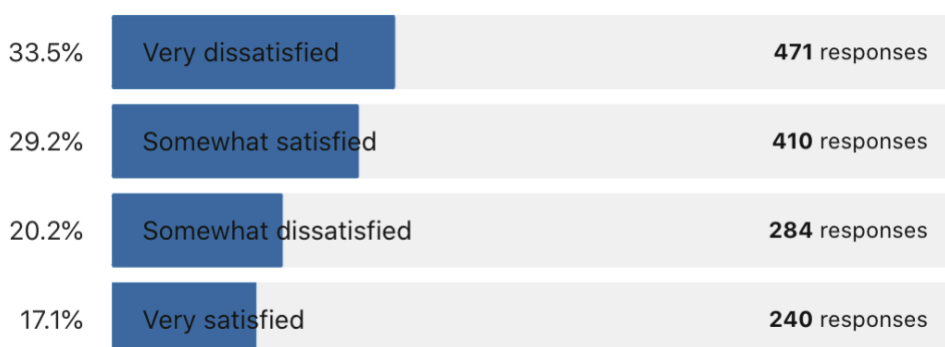
What are your main uses of the internet?



As depicted in the graph above, a majority of respondents use the internet for nearly all of the listed activities. With responses of more than 70% of respondents, **the most common uses included communicating with others, education, and entertainment.**

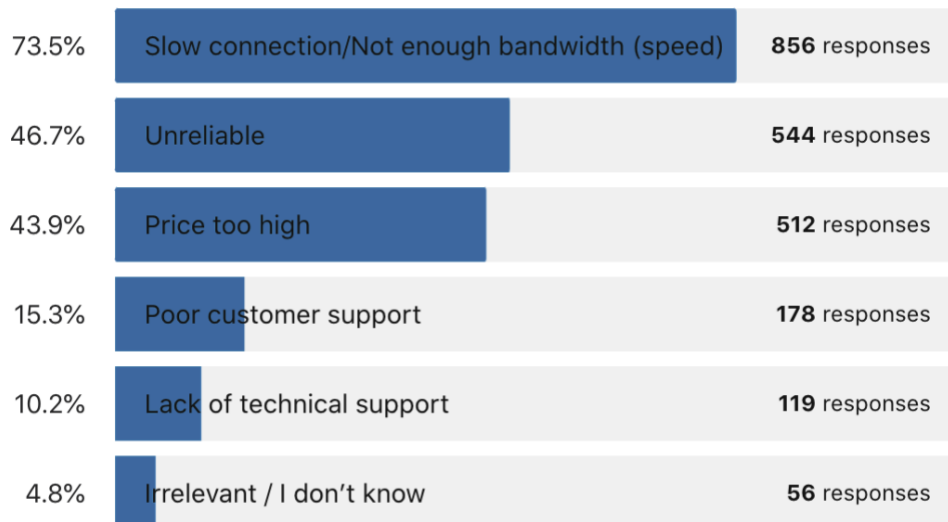
7

How would you describe your overall satisfaction with your current internet service?



**Just under two-thirds (64%) of respondents expressed some degree of dissatisfaction with their current internet service,** a slightly larger share than those that expressed dissatisfaction with their internet speed in Q4.

**7.1** What are the main reasons for your dissatisfaction?

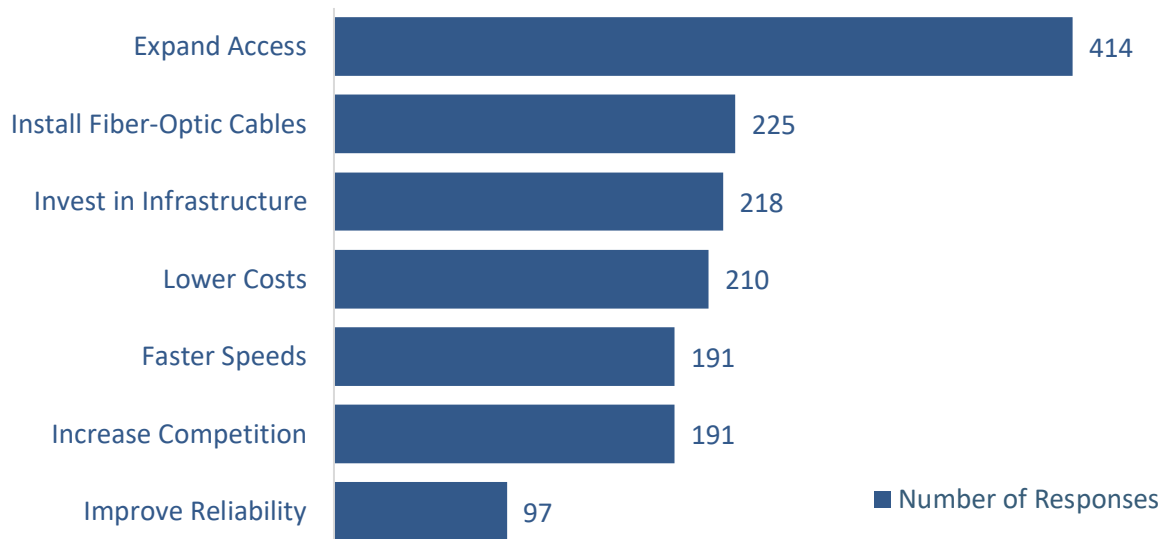


Of the 1,165 respondents in Q7 who did not report feeling “very satisfied” with their current internet service, **nearly three-quarters (74%) cited slow internet connection and speeds as their primary complaint**. Almost half also pointed to internet unreliability (47%) and high costs (44%).

RESULTS ANALYSIS

# Open-Ended Question Analysis

**8** In your opinion, what should the County do to improve the internet service in the area?<sup>2</sup>



When asked how the County could improve internet access in the area, [1,306 respondents](#) pointed to several main pain points, including:

- **Expand Access** (414 responses): The most popular request — making up nearly a third of responses — was that the County expands internet availability to all regions, including the more rural and remote areas.

*“Make it available to people who live in remote areas of the county.”*

*“Expand access to quality internet service in more rural areas like where my family lives.”*

- **Install Fiber-Optic Cables** (225 responses): Many argued that residents would greatly benefit from fiber-optic internet services.

*“Assist in providing fiber-optic internet service.”*

<sup>2</sup> Note that an individual response could allude to multiple pain points.

*“Have fiber installed and available for all businesses and homes. We had to pay to have fiber installed to our facility last year.”*

- **Invest in Infrastructure** (218 responses): Others maintained that public funds would be best spent on investing in physical infrastructure to support better internet access.

*“Needs to be more towers not only does internet not work but neither do cell phones to many dead zones.”*

*“Provide infrastructure so that all have internet accessibility.”*

- **Lower Costs** (210 responses): The affordability of internet services was also a common complaint, especially among those in more rural areas.

*“Reduce cost. It is relied on for a child in school. Internet should not be as expensive as it is.”*

*“Make it affordable to access. We were quoted close to 20K to install.”*

- **Faster Speeds** (191 responses): Slow internet speeds were a recurring grievance raised by residents, who argued that the internet speed was not sufficient for everyday needs.

*“Make high-speed available to everyone.”*

*“Augusta County should have reliable internet with at least an option of 25 to 50 mbps internet speed.”*

- **Increase Competition** (191 responses): A large bloc argued that there were not enough options of internet providers and that the lack of choice harmed consumers.

*“More options are needed. For areas of the County, Comcast is the only available option, so there is no competition to drive prices down and improve customer support.”*

*“Only one high speed provider in our area and price is way too high without competition.”*

- **Improve Reliability** (97 responses): Residents also raised general complaints about the reliability of internet connectivity.

*“Consistent accessibility.”*

*“Provide reliable service to Augusta County.”*

COMPLEMENTARY ANALYSIS

# Social Media Discourse Analysis

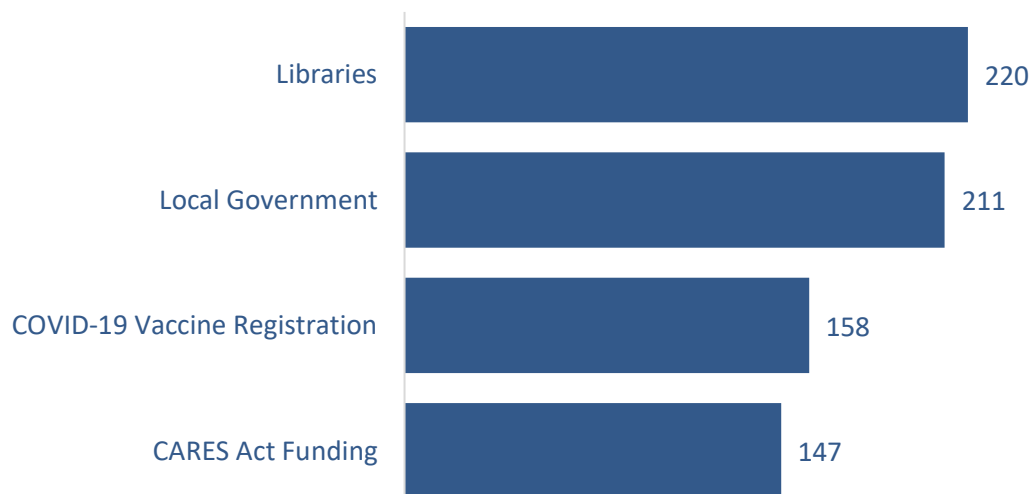
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Between July 20, 2020 – July 19, 2021, [1,827 online interactions](#) concerned internet access in Augusta County.

Four of the most prominent drivers of the social media discourse are depicted in the graph below. Internet access at local libraries and local government efforts to improve the County’s internet capabilities drove nearly a quarter of the discourse (220 and 211 interactions, respectively). COVID-19 vaccine registration resources for those without internet access (158 interactions) and posts about CARES Act-funded broadband installation in December 2020 (147 interactions) also gained traction over the past year.

### Areas of Discourse: Internet Access

(Number of Interactions)



Online discourse about the [Internet Access Survey](#) itself garnered 249 interactions — representing 14% of all internet access-related social media discourse in the past year. Nearly three-quarters (71%) of interactions about the survey came from official County channels, with most of the remaining 29% stemming from news outlets and schools.

Most interactions in the survey discourse consisted of likes and shares, as well as a handful of commenters writing that they had filled out the survey. Notably, however, [one commenter](#) shared concerns that no action would be taken after the survey, as they reported this being case after a similar effort five years ago.

## Conclusions

The survey results outlined above indicate that **dissatisfaction with internet access, speed, and service is widespread in the community.**

Perhaps unsurprisingly, residents identified internet access as an indispensable part of their everyday lives — especially for communication, education, and entertainment.

Considering the consensus agreement about the importance of internet connection, **any action taken by the County to improve internet connection is likely to positively affect all constituents** and not just a select group.

Although the overwhelming majority of respondents had access to some form of internet at their current location, most complained of low speeds and poor service, and many relied on slower forms of connection — including cellular service, satellite-based internet, and dial-up phone lines.

Given these considerations, the County should be aware that **although nearly all residents have access to some form of internet, many feel that the type of internet they have is insufficient.**

Survey respondents repeatedly pointed to limited access to internet due to their geographic location in the County. Furthermore, this inequitable access to reliable and affordable internet service results in cost and logistical barriers.

Accordingly, it is clear that residents feel that, **no matter their location in the County, they should have sufficient access to a dependable source of internet connection,** a problem which increased infrastructure investments could alleviate.

Finally, concerns about prohibitive costs — especially for residents in more rural areas — appeared throughout the responses to the open and closed-ended questions. Some pointed to insufficient competition among service providers as the main factor driving up costs.

As such, **the County should consider initiatives that increase internet affordability,** be it through grants, investments, or coordination with local providers.

**To conclude, despite the centrality of internet usage in their everyday life, most residents believe that the County is suffering from inequitable and insufficient internet access.** Continuing to explore all possible avenues to alleviate this bottleneck issue and investing in beneficial solutions will likely have widespread positive ramifications in the community.