Women are Always "On": Broadband Survey Results

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I. Executive Summary

The Internet has become broadly available and essential for personal interactions, education, training, and economic opportunities, (job searches, marketing, researching, networking, etc.). Today, high-speed Internet plays a central role in our lives. The results of an on-line Internet survey conducted by Business and Professional Women's Foundation[1] on the use of high-speed technology by women confirms this and also shows that there are differences in high speed Internet access, use, and needs based on age, employment, military status, and geographic location. Not surprisingly, women business owners and self-employed women use high-speed technology to build their businesses through marketing, but readily admit that they are not always aware of what they should be learning/doing to improve efficiency, advance and maximize their results. On the other hand, women veterans express serious concerns about security of Internet technology and its efficacy in securing other aspects of their lives.

In February 2011, BPW Foundation initiated a survey to research the use of high-speed Internet (broadband) technology among four diverse groups of women: those employed by others, those self-employed, those retired, and women seeking employment. The purpose was to explore women's use of technology in both their business and personal lives, as a measure of advancement and overall impact on quality of life and personal/professional success.

BPW Foundation launched this online survey in early March 2011 to a broadly-targeted group of women's networks across the United States. Responses were quantified and analyzed to understand directions and patterns in women's use, interests, and needs as they seek and access high-speed Internet. BPW Foundation examined general trends and interpreted data from specific subpopulations of women, including those who are self-employed and/or own their own businesses, those involved in the military, mature workers, and those living in rural areas. BPW Foundation also studied Internet habits and practices among women in business when accessing government contract opportunities as a resource for business growth. This analysis was prompted by new legislation that encourages government procurement opportunities directed to women-owned small businesses.

Among the total 1400 responses received,[2] key findings include:

- Women are constantly connected to high-speed technology, at home or away, on a range of devices. Within sub-populations, mature women and those in rural areas are less likely than others to remain connected via mobile technology.
- Given the need for multi-tasking by women in today's society, increased Internet access and reliable Internet speed is essentially a requirement, integral to a variety of confidence-boosting behaviors and effective, educated decision-making.
- Women use high-speed Internet for personal and professional networking and social interaction, product research and personal business (e.g., banking) secondarily for business marketing and development.
- Few women in business utilize the Internet to access government procurement opportunities for professional exposure and business growth.

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[1] Business and Professional Women's (BPW) Foundation, founded in 1956, is a non-profit organization committed to enhancing the working lives of women, and working with employers to build successful workplaces for women's career advancement.

[2] Survey was officially launched on March 1, 2001 and closed on March 28, 2011 to evaluate statistical trends and analysis.

- Nearly 60% of women are satisfied with their understanding of Internet pricing and provider options, but they would like to learn more about these and understand technical broadband functionality.
- Women with experience in the military are more concerned than other populations about Internet security and how they might use this technology to improve their personal security.

Broadband and mobile technologies confer professionalism (faster responses, cleaner/current products) and flexibility (streamlining a more efficient, coordinated work-life agenda). The Internet augments women's ability to remain in the workforce and facilitates re-entry after periods of unemployment. The level of personal satisfaction and financial security technology provides working women is critical to their overall well-being and productivity.

Recommendations based on these BPW Foundation survey results:

1. Expand high-quality and diverse high-speed Internet education opportunities for women.
2. Promote Internet government procurement opportunities for women-owned small or at-home businesses.
3. Competition, choice, and education will build a stronger high-speed Internet market for women.
4. Support research into the sub-populations of women surveyed and strengthen information networks for organizations that can support professional growth for women interested in exploring new and/or advancing business opportunities.

For more information on BPW Foundation, please visit: http://www.bpwfoundation.org/

II.   Survey Purpose and Methodology

In February 2011, Business and Professional Women's BPW) Foundation[3] initiated a survey to research the use of high-speed Internet (broadband) technology among four diverse groups of women: those employed by others, those self-employed, those retired, and women seeking employment. The research objective was to explore women's use of technology to leverage opportunities in business and for personal advancement. In March 2011, a 23-question online survey was launched using Survey Monkey, and broadly targeted to a diverse group of women's networks across the United States. In addition to demographic questions, data was captured on:

- ***Women's General Access, Comfort and Success using High-Speed Technology***

- ***Women's Aspirations and Challenges as they relate to High- Speed Technology***

- ***Women's Knowledge of Technical Connections, Devices/Hardware and Technical Skills***

A complete list of questions and a summary of responses can be found in the Appendix.

The responses were quantified and analyzed to provide insight into women's habits and practices, interests, and needs when accessing and using high-speed Internet. BPW Foundation examined general trends as well as data from specific sub-populations of women, including those who are self-employed or own their own businesses, those involved with the military, mature workers, and those living in rural areas. BPW Foundation also studied the use of the Internet by women in business as they accessed government contract opportunities as a resource for business growth. This analysis was prompted by recent legislation to stipulate that a percentage of government procurement opportunities be directed to women-owned small businesses.

Women responding to the survey were provided with the general definition of broadband as high-speed technology. For clarity while reviewing the following responses, the reader should understand that currently, broadband is a relative term. In essence, the broader the bandwidth, the faster information from various sources will reach an individual. Broadband options range from dial-up, DSL, and cable to fiber. Broadband, or the "highest-speeds" of each option, will continue to become faster. Survey respondents understood this definition and were able to respond to general questions (e.g., "how has high-speed technology impacted your life?") as well as to specific questions (e.g., "what type of connection/s do you have?").

Requests for survey participants were disseminated by email as well as through social media and websites to broad-ranging members/constituents/conference contacts including the following networks:

- AARP's internal communication website (www.aarp.org)

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[3] BPW Foundation transforms workplaces by strengthening the capacity of organizations and businesses to create work environments that are inclusive and value the skills and contributions of working women. A Successful Workplace, as defined by BPW Foundation, is one that practices and embraces work-life balance, equity and diversity. BPW Foundation is a 501 (c) (3) research and education organization. The work of BPW Foundation supports workforce development programs and workplace policies that recognize the diverse needs of working women, communities and businesses.

- Academy Women (www.academywomen.org)

- American Legion (www.legion.org)

- American Society for Public Administration (www.aspanet.org)

- Business and Professional Women's Foundation (www.bpwfoundation.org)

- National Council of Women Organizations (www.ncwo.org)

- National Foundation for Women Legislators (www.womenlegislators.org)

- National Women's Political Caucus (www.nwpc.org)

- Women in Film and Video (www.wifv.org)

- Women Impacting Public Policy (www.wipp.org)

- Women in Military Service for America (www.womensmemorial.org)

As of March 28, 2011, 1400 surveys were collected and analyzed for this report.

Women who completed the survey were *generally*:

- From **Urban/Suburban** areas (75%) in states classified by the federal government as:

    o **Region III**: DE, DC, MD, PA, VA, WV (29%)
    o **Region IV**: Al, FL, GA, KY, MS, NC, SC, TN (18%)
    o **Region V**: IL, IN, MI, MN, OH, WI (12%)

- **Mature** – over age 50 (66%)

    o 47% of the respondents were 51-65 years old while 19% were over 65 years old.
    o 23% were 36-50 years old.
    o 11% were 20-35 years old.

- **Educated** with a 4-year degree (33%) or a Master's degree (29%)

- **Employed (currently or previously) as a non-executive**

    o 46% of respondents were "working for someone else"
    o 24% were retired
    o 23% were "self-employed/owning own business"
    o Executive positions were held by 11% of the respondents

- **Living in households with a family-sustaining wage**

    o Most respondents (25%) had an annual household income of $50,000-$74,999.
    o 19% fell between $100,000-$149,999.
    o 17% fell between $25,000-$49,999 as well as $75,000-$99,999.

- o 15% earned over $150,000.
- o The least number of respondents (7%) earned under $25,000.

The survey captured the following sub-populations of women, and their data will be analyzed specifically in the Survey Findings and Supportive Research Section.

- **23% were self-employed or owned their own business[4]**

- **27% were involved with the military[5]**

  - o 3% of the women were active military (inclusive of Guard and Reserve),
  - o 10% were retired military,
  - o 14% were veterans.

- **66% were mature workers[6]**

  - o 47% were 51-65 years old
  - o 19% were over 65 years old

- **25% were living in rural areas[7]**

III.   Survey Findings

Women's General Access, Comfort and Success Toward High-Speed Technology

1. Given the need for multi-tasking by women in today's society, increased internet access and reliable Internet speed is essentially a requirement, integral to a variety of confidence-boosting behaviors and effective, educated decision-making.

Survey respondents overwhelmingly agreed that high-speed technology has improved their lives (93%). This is consistent with recent research concurring that women around the globe feel an overall sense of well-being, freedom, and control when they have access to information technology (IT)[8]. Such examples include:

- financial savvy as women research prices or search for coupons before making individual and family purchases

- healthcare-decision confidence on behalf of their aging parents or growing children

- researching, applying for, and understanding competitive wages for area jobs

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[4] 282 of 1244 respondents reported being "self-employed" or "own my own business"

[5] 347 of 1400 respondents reported being actively in the military (33), retired military (133) or veterans (191)
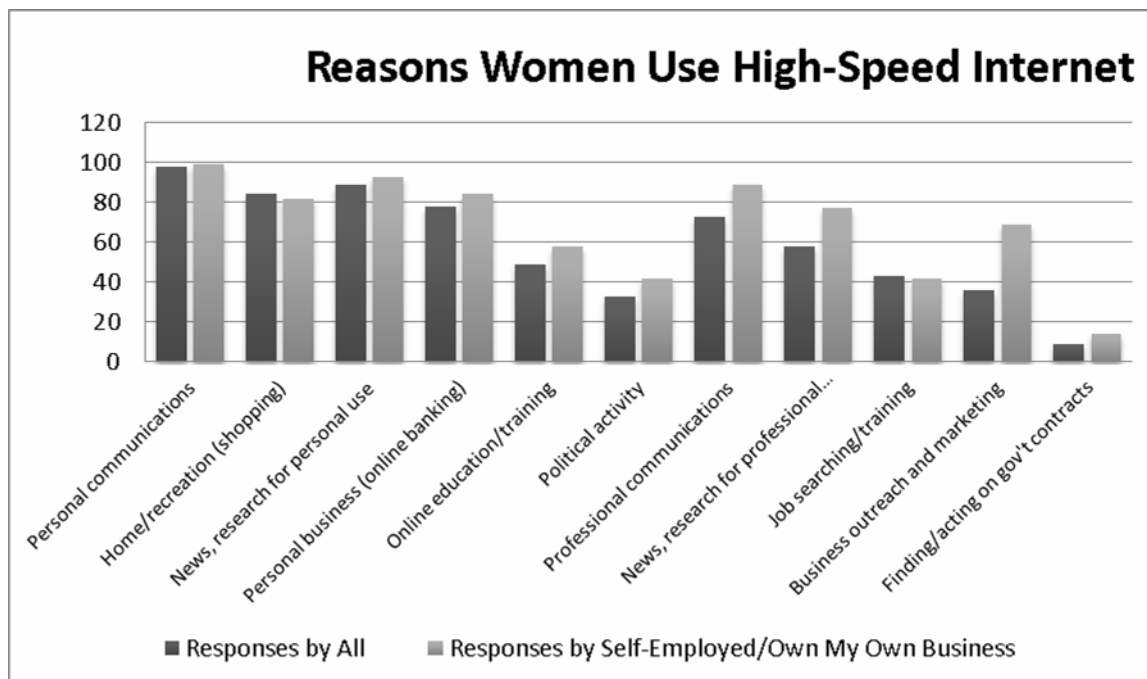
[6] 845 of 1283 respondents reported being "51 to 65 years old" (n=602) or "over 65 years old" (n=243)

[7] 318 individuals reporting of the 1284 respondents to this question

[8] Trajectory Partnership. May 2010. *The Information Divided: Can IT Make You "Happier"?* Prepared for BCS. Available online at: http://www.bcs.org/content/conWebDoc/35476

2. Women use high-speed Internet for networking, social interaction (personal and professional), product research, and personal business (banking).

The range of "reasons to use high-speed Internet" was expectedly varied (see table below). Primary motivators included personal communications (e.g., with family, friends, groups to which they belong), finding information for personal use, home, and recreational purposes (online shopping, photos). Half of the women use the Internet for online education and training. Women who wrote in other reasons for using high-speed Internet noted volunteerism and support for their own home-based businesses. Responses in dark grey bars indicate responses by all women. Responses in light grey bars indicate responses by women who are self-employed/own their own businesses.

Reasons Women Use High-Speed Internet

Categories (left to right): Personal communications; Home/recreation (shopping); News, research for personal use; Personal business (online banking); Online education/training; Political activity; Professional communications; News, research for professional...; Job searching/training; Business outreach and marketing; Finding/acting on gov't contracts

■ Responses by All   ■ Responses by Self-Employed/Own My Own Business

3. Women (particularly women small business owners) are conducting more activities by themselves, at all times and in all facets of their lives (personal and professional).

The survey results show that women who "own their own business" (light grey bars), as compared with all women respondents (dark grey bars), have higher rates across the board for reasons to need/desire high-speed Internet with the sole exception of the (expected) category "home and recreation (shopping, movies, photos)." "Professional communications" is listed by 89% of small business owners as compared with 73% of all women. "Funding research for professional use" is noted by 77% of small business owners as compared to 58% of all respondents. More than 69% of women-led small business use the Internet to "conduct outreach/marketing" as compared to 36% of all respondents. Additionally, 14% of women-led businesses use the Internet to "find government contracting opportunities" as compared to 9% of all respondents.

> This (finding) is supported by extensive research that the impact of broadband speed and price on small businesses it critical to a company's success. "The Internet has transformed the way small businesses operate, communicate with employees, and interact with customers. [The

Internet] is an important tool for achieving strategic goals, improving competitiveness and efficiency, reaching customers, and interacting with vendors. [Small business owners from a separate study] indicated that high-speed (broadband) Internet access is as essential as other utilities such as water, sewer, or electricity."[9]

4. Women (particularly working women) are constantly connected to high-speed technology, at home or away, on a range of devices.

Considering the wide range of Internet activities women rely on, more than half of total respondents said the component with the "greatest impact on their professional lives" was "the ability to create/ maintain professional connections" (56%). A distant second was their interest in creating a work-life balance through home-based work opportunities (e.g., telecommuting) (15%). The women typically connect on a daily basis at home, their office and "anywhere" using multiple methods (not one individual medium): desktops (80%), laptops (74%), smartphones (43%). Of particular note is that of the 69 write-in "other" responses, women primarily noted Blackberries and assorted Apple devices (iPad, iTouch, iPhone, and iPod). This suggests that while Blackberries and iPhones are considered "smartphones", their brand recognition is strong enough to transcend category.

5. Women want to better understand the technical issues related to broadband, while nearly 3 out of 5 women are satisfied with the price, provider options, and the information available.

Without question, respondents were interested in learning, as almost one in two women wanted to know more about high-speed technology access and use, specifically as related to (listed by order of importance): pricing options (52%); different modes of Internet access (52%); the technology itself (51%); speed (44%); and area providers (34%). Additional write-in responses expressed an interest in access for rural communities, how to address areas with provider monopolies, and a general desire to stay informed about new technology.

Most women (86%) were satisfied with the high-speed Internet options available to them (71%). Nearly three out of five women (57%), concurred they had satisfactory provider options in their area, that high-speed Internet technology was reasonably priced (60%) and that they had enough information to decide which provider options were best for them (59%)[10].

Women's Aspirations and Challenges Related to High-Speed Technology

1. Women want to use high-speed technology to build their small and home-based businesses (particularly through marketing) but readily admit they are unaware of what they should be learning/doing.

Women were asked "What would you like to do using high-speed Internet that you cannot do now?" and "What would you need to be able to do so?". A common aspiration from the 20% (n=401)

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[9] Columbia Telecommunications Corporation for SBA Office of Advocacy. November 2010. *The Impact of Broadband Speed and Price on Small Business*. Available online at: http://archive.sba.gov/advo/research/rs373tot.pdf

[10] "With respect to high-speed Internet" 769 respondents stated it was "reasonably priced", 754 said there was "enough information to decide which provider options were best" and 731 said there "were sufficient provider options" of the 1300 individuals who responded to this question.

respondents centered on building a better business, often via leveraging social media to market their businesses. Many women specifically noted video downloading and a desire to have faster downloading speed, better quality and/or uninterrupted streams. Skype was another specific area of interest for women. In line with these interests was their frustration, as several respondents commented that their current access is unreliable and slow, prohibiting them learning/using these options (e.g., from participating in video conferencing).

Many write-in responses mentioned an interest in "increasing my mobility," "being able to use my laptop outside of the office and home," and "lower pricing." Of particular importance to several respondents was the ability to conduct personal and professional financial matters in a secure manner. This could be connected to female responsibilities related to bill paying, tax, and general financial management.

Several commented that "I'm not sure," "I need more information," and "I'm not technologically advanced enough to know what I don't know!" suggesting they are aware that they don't know the full range of services and uses broadband can afford them. The point that they know that they "don't know" was further discussed in the 332 "What would you need to be able to do so?" responses where women cited "training" and "instructions." Respondents again expressed a desire for lower costs and increased competition by providers, as well as a plea that providers would install high-speed Internet in their communities. Multiple types of hardware (laptop, smartphones, air cards) were particularly noted as needs so that women could have access anywhere and at any time.

2. Women are not accessing government contracts for business growth.

Women were specifically asked if they ever pursued government contracts for their business. The question of government procurement interest is important in examining how women business owners approach resource development for growth. Government procurement avenues can afford any company growth and stability opportunities. This survey question was designed to explore if women have, or would have, an interest in government procurement opportunities and whether high-speed Internet had opened this channel for business growth. This is particularly important when the government targets women, minority-owned, and small businesses directly or as suppliers to larger companies receiving government contracts. Interestingly, the federal government procurement goal of 5% to women-owned businesses is not being met. While a majority of women who took the survey did note interest in aligning greater technology with their business efforts, with regard to government procurement to advance their companies, 73% of women responded "no, and I don't have any interest/need" to pursue government contracts. Only 16% said they are not accessing but would like more information, while 12% had applied for government contracts (9% on occasion and 3% regularly).

Women's Knowledge of Technical Connections, Devices/Hardware and Technical Skills

1. Women are always connected, everywhere, on a range of devices.

Women access the Internet daily (94%) and using multiple types of hardware, including desktops (80%), laptops (74%), smart phones (43%), and notebooks/tablet computers (14%). Again, the mobile handheld technology write-in "other" responses primarily included Blackberries and Apple devices (iPad, iTouch, iPhone and iPod), which increases the "smart phone" category percentage but also suggests women may identify with brand names versus functionality. Given the range of hardware used, the locations of use vary widely and include home (97%), work (69%), locations while on travel (56%), and "everywhere"

using handheld devices (Blackberries and smart phones were two common write-in responses). Public libraries (13%) and school (8%) were less often points of connection, but this could be an indication of the demographics where mature women have lower enrollments in schools and/or use of public libraries.

2. Women upgrade their (wireless) technology connections annually when it is 3 to 12 months dated.

Sixty-four percent (64%) of women upgraded their technology connection within the last year, 33% having upgraded between the last three (3) and twelve (12) months. Only 14% upgraded within the last month and 17% upgraded within the last 3 months. This question was written as "technology connection" but also was perceived by some respondents to mean hardware (e.g., purchase of a smart phone), software update, and/or access upgrade (e.g., upgrade to cable connection). Of the 1384 individuals who answered the "What type of connection/s do you have to high-speed Internet?" only 3% of women were unaware of the type they had. Primarily, connections to high-speed Internet included:

- wireless (57%)
- DSL (40%)
- Fiber (11%)

- cable (41%)
- LAN/WAN (22%)

Satellite (4%), dial-up landlines (3%), and leased lines (<1%) were rarely used and the majority of the 29 write-in responses included T1 lines.

3. Most respondents do not have technology certifications nor have they ever worked in a technology-related field, although they use high-speed Internet regularly for work.

Ninety percent (90%) of the respondents do not have technology certifications, and (79%) have never worked in a technology-related field. Women who do have certifications primarily cited assorted Microsoft certificates.

Subpopulations

Five sub-populations of women were of particular interest, and their response data was separately analyzed and compared to the responses from all women who completed the survey.

Women Who Categorized Themselves as "Self-Employed" or "Own Their Own Businesses"

One out of five (20%) survey respondents categorized herself as "self-employed" or "owning their own business" (n=282). It is of particular note that the majority of the write-in responses to those who selected these categories provided comments that indicated they had small and/or home-based businesses. While the survey did not probe the size of each business, it is presumable that the majority of these women work in microbusinesses[11]. These respondents tended to be more mobile, using their desktops less than any sub-population and less than the overall responses from all women (78%) but using their laptops (77%) and handheld devices (smart phones (52%), tablets (20%), iPads) more than the general respondents. These women wanted to learn more about high-speed Internet technology and had a stronger interest than the general population in pricing options (59%) and speed (49%).

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[11] A micro-enterprise (or microenterprise) is a type of small business, often unregistered, having five or fewer employees and requiring seed capital of not more than $35,000. http://www.microenterpriseworks.org

Again, women who were self-employed/own their businesses conduct more Internet activities by themselves, at all times, and in all arenas of their lives (personal and professional)—see graphic on page 5. The data also show that respondents who "own their own business" (light grey bars), as compared with all women respondents (dark grey bars), have higher rates across the board for reasons to need/desire high-speed Internet. Some of the largest gaps found include "funding research for professional use", which is done by 77% of these women, as compared to 58% of the general respondents. Additionally, more than 69% of women who were self-employed or owned their own business use the Internet to "conduct outreach/marketing," as compared to 36% of the general respondent population. Moreover, and not surprisingly, 14% of women-led businesses use the Internet to "find government contracting opportunities," as compared to 9% of the general population.

Women who own their own businesses want to use high-speed Internet to:

- build their businesses

- access information faster

- solve their own technical problems

- safely, securely conduct financial matters (purchasing, entering credit card information online)

- better filter unwanted communications (spam/junk mail)

- use social media for marketing purposes

- use video conferencing

The Internet challenges that limit their businesses include slow speed, lack of training/education/support, and unreasonable pricing.

Women Who Apply For Government Contracts

Ten percent (10%) of the survey respondents had applied for government contracts (n=145). Of those who said "yes", 76% did it "on occasion" while 24% applied "a great deal." These women are most likely to have a master's degree (33% versus 29% of the general respondents) and have been employed in a technology related-field (33% versus 22% of the general respondents) suggesting they are not only more educated but also more comfortable utilizing technology. They are also the most likely sub-population to possess technology certifications (14% as compared to 10% of all respondents).

As for technical connections, this particular sub-population is:

- the most likely to utilize mobile technology (laptops at 89%; smart phones at 58%; notebook/tablet computers at 21%) as compared to the overall responses from all women of 74%, 43%, and 14%, respectively

- slightly more likely to log on daily (97%), versus the overall average of 94%

- the least likely to use dial-up to connect to the Internet (2%), but the most likely to use wireless 71%), as compared to the responses from all women (3% and 57% respectively)

Significantly higher than the responses from other sub-populations and the overall responses from all women, women who applied for government contracts use the Internet most often for business-related activities including: professional communications (96%); personal business (88%); research and funding information (80%); and business outreach and marketing (63%).

Women who apply for government contracts are more likely to indicate that "research of and access to government contracts" is the "component of high-speed Internet that has had the greatest impact on their professional lives" (5% as compared to less than 1% from all women respondents).

The following table shows that the women most likely to apply for government contracts are those who are self-employed/have their own business. Following that group, working women are the next most likely group to apply for government contracts, applying on behalf of their employers. Women in general do not utilize that funding resource. In every case, the maximum uptake of women applying for government contracts is 19% (15% "on occasion" and 4% "a great deal"). This percentage is still small, suggesting there is great potential for channeling women into these funding streams.

Have you ever pursued government contracts for your business?	All women respondents	Working women[12]	Self-employed/Own their own business women
No, and I don't have any interest/need	72%	71%	54%
No, but I'd like to learn how to get money from the government	16%	15%	27%
Yes, I have done this on occasion	9%	10%	15%
Yes, I do this a great deal	3%	4%	4%

Women Involved in the Military

Twenty-five percent (25%) of the survey respondents were involved with the military (n=347). Three percent (3%) of these women were active military (inclusive of Guard and Reserve), 10% were retired military, and 14% were veterans.[13] As for technical connections, this particular subpopulation is:

- most likely to utilize desktop computers (84%, compared to responses from all women of 80%)

- least likely to access the Internet at home (63%, compared to responses from all women of 69%) but the most likely sub-population to access from a public library (14%, compared to responses from all women of 13%)

- more often connecting through DSL lines (48%, compared to responses from all women of 40%) and less often through wireless (51%, compared to all women respondents of 57%)

When asked, "What would you like to do using high-speed Internet that you cannot do now?" and "What would you need to be able to do so?" military women requested faster downloads of media, similar to all respondents, but also mentioned security features. Sample comments included "having free, secure connection everywhere"; "building, home and neighborhood security through cameras and

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[12] A report of "working women" was created by capturing women who selected their employment/professional status as "work for someone else", or "executive in a for-profit, non-profit or government organization" or "self-employed/own my own business." 717 respondents were counted as "working women."

[13] Because of rounding, percentage sums for sub-populations may not be exact.

alert software with real-time feeds to a website [I can monitor]"; "[how to] protect my online information and access it securely," and "home security, home utility and infrastructure monitoring." These responses possibly reflect transient and highly mobile military women managing their homes while they are away. Unfortunately, while security is more of a priority for military women, their "need" to meet their security interests are stated as "unknown." One respondent summarized the lack of understanding with the answer "[it is] difficult to put into words at this point." Based on these security interests, their educational demands for high-speed Internet primarily reference online security education and providers of "deals for veterans."

Military women are much more likely to indicate that high-speed Internet has greatly impacted their employment access/information (15%) and to seek continuing education/professional development opportunities (17%), compared to the responses from all women (10% and 11% respectively). High participation in online education underscores research that military women are more likely to have technology certifications (14%), compared to the general population of women respondents (10%).

Finally, military women are the least likely sub-population to be self-employed/own their own business (12%) as compared to all respondents (23%).

Mature Women

Sixty percent (60%) of the survey respondents were mature (n=845). Forty-seven percent (47%) of women were aged 51-65 years old, while 19% were over 65 years old. Mature women tended to use mobile technology less often relative to all women respondents (laptop use of 69% as compared to 74% overall; smart phone use of 34%, compared to 43% overall; and notebook use of 12%, compared to 14% overall). However, they use desktop computers more often than other groups (84. compared to overall responses of 80%). Mature women use wireless connections slightly less than all women (52. compared to 57%). Their primary educational goals in relation to high-speed Internet stem from security concerns and a general desire to "keep on top of new technology." This sub-population responded similarly with the overall responses from all women. When asked "What would you like to do using high-speed Internet?" and "What would you need to be able to do so?", mature women noted watching/downloading videos faster (specifically mentioning Skype and video conferencing), generally understanding technology more so "I can use it better" and security for "things related to money exchanges." They specifically noted more competition, increased services in their areas, faster speed and training/online tutorials/webinars. Several noted "I don't know what I need."

Women Who Live in Rural Areas

Twenty-three percent (23%) of the survey respondents reported they lived in rural areas (n=318). In terms of technical connections, this particular sub-population is:

- least likely to utilize mobile technology (31% use a smart phone, compared to responses from all women of 43%, and only 10% use notebook/tablet computers, compared to responses from all women of 14%)

- most likely to access the Internet using DSL lines (48%, compared to responses from all women of 40%)

- less likely to upgrade their technology often (43% of rural respondents noted upgrading "over a year ago," compared to responses from all women of 36%)

Rural respondents were less interested in learning about technology (44%) and much more interested in learning about "who provides access in [their] area (43%) compared to responses from all women (51% and 34%, respectively). Sample statements from the question "in what areas would you like more education?" included "how to get options to my area", "what does my provider need to motivate to install in my area?", "explain why this area is so behind the times," and "new forms of access and when they'll be available in my hometown."

Rural respondent interest in connecting was supported by their write-in answers to the questions, "What would you like to do using high-speed Internet that you cannot do now?" and "What would you need to be able to do so?". Rural respondents noted faster download of media similar to all respondents but also mentioned telecommuting, increased entertainment options and lower prices. Their expected "needs" relative to these wants included faster speed, training and reasonable pricing/service in their area.

Rural respondents are frustrated with big companies service and disinterest in low-density areas. They are the sub-population with the least "yes" responses to the following questions:

- Do you have options available to you? (78% versus 86% overall)

- Is the speed fast enough? (63% versus 71% overall)

- Do you have sufficient provider options (43% versus 57% overall)

- Do you have enough information to decide which provider option/s is/are best for you? (56% versus 59% overall)

Alternatively, their "no" responses were significantly higher compared to the overall responses from all women and all other sub-populations. There is undoubtedly a market and demand for services to this group.

IV.   Summary

How does broadband and mobile technology enhance the lives of working women and women seeking employment?

Without question, broadband and mobile technology enhances the lives of working women and women seeking employment. Many women typically manage a range of personal and professional responsibilities and issues on a daily basis. From worker, business-owner, and mother to financial decision-maker (particularly for those in isolated and/or rural communities) technology has opened up a world of opportunities for all women by supporting whole-life advancement.

On the personal front, broadband access and handheld devices provide ready information and an ability to make educated decisions and respond instantly. On the professional front, high-speed technology empowers women via their various connection(s). For example, a woman cannot easily complete a resume on her hand-held device, so performs this task on her laptop. However, when searching for a job, she can view email listings on her handheld to monitor opportunities in real-time. For a woman who is employed, broadband and mobile technologies enable her to write reports with a sleeping infant

in her lap, download financial reports without the computer freezing at her kitchen table at 3 am, or join conference calls on her way home from caring for an elderly relative.

Broadband and mobile technologies enhance professionalism (faster responses, cleaner/current products) and flexibility (allowing better incorporation into a work-life agenda and enable women to stay in the workforce longer and/or return faster after periods of not working. High-speed technology provides critical opportunities for personal satisfaction and financial security.

V.   Recommendations

1. Expand high quality and diverse high-speed Internet education opportunities for women.

BPW Foundation suggests more educational opportunities and platforms targeting women who "know that they don't know" about high-speed technology, including connection options (providers, pricing), hardware decisions (comparing technical specs such as processor and memory) or high-speed technology capabilities (e.g., how to use video streaming to participate in online conferences). One such education platform that was recently introduced is WirelessED, a national multilingual program to educate consumers on wireless service and devices. The program will reach a national network of 8000 community-based organizations (CBOs) across the country and more than 275,000 consumers. Consumer Action is heading up the effort, with exclusive sponsorship from AT&T.

The program consists of three components:

- Three educational brochures for distribution to consumers on the following topics: Using Data Wisely; Choosing & Using Mobile Devices; Roaming the World With Your Phone

- www.WirelessED.org – A website offering interactive tools and materials to help consumers monitor project data usage and receive reminders to check their wireless usage. The website also provides direct links to tools and information available from carriers.

- Train-the-trainer roundtables

The use and expressed value of this new program by customers will provide important information on reach and need for expansion of high-speed technology education.

2. Promote government resources to women-led small businesses.

While broadband access has the potential to link women, particularly women with their own small businesses, to government contracts, the uptake is low. Recently, the SBA implemented the Women-Owned Small Business Federal Contract Program, which will allow contracting officers to restrict competition to women-owned companies in 83 industries. The program will assist women in winning federal contracts. Moreover, government contracts will become more easily accessible through greater education and outreach, regular announcements, targeted funding programs, availability of application instructions, and disbursement through assorted government offices (e.g., Women's Business Centers and SCORE. Tailored resources are needed to support women as they seek, apply for, acquire, and monitor contract opportunities, as well as incentives for larger corporations recruiting small

business owners as partners and suppliers. Further research on participating small business owners in this survey and others would facilitate opportunities for government procurement by women-owned businesses.

3. Competition, choice, and education will strengthen the high-speed Internet market for women.

In March 2010, the Federal Communications Commission (FCC) launched a "National Broadband Plan" targeted at all consumers (particularly underrepresented ones), across multiple sectors to "create new jobs and industries, provide consumers with new powerful sources of information, enhance American safety and security, and connect communities in ways that strengthen our democracy."[14] Broadband is a powerful tool to connect women to resources ranging from employment to healthcare information, enabling them to better participate in our technology- driven society, while freeing up their time for social or community involvement endeavors, personal development (education), and professional activities (e.g., home-based businesses).[15] Without access to high-speed Internet, the digital literacy gap will only widen for women, hindering their success in both professional and personal endeavors. Given the responses and realities of women in this survey and other research, increasing Internet provider options to all communities and providing high-speed Internet options at a reasonable price is essential to bridge this gap.

4. Continue research into the sub-populations of women reflected in this survey and build information networks to organizations that can support professional growth of women interested in exploring new or advancing business opportunities. This might include such groups as Chambers of Commerce, Women's Business Development Centers, AARP, and organizations that provide education, training, or other services for women to better understand and utilize high-speed technology resources. Further research, education and support for women veterans as they transition from the military and seek business opportunities would build women business-owners among this population of skilled and well-disciplined workers.

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[14] Office of the Press Secretary, The White House. March 16, 2010. *Statement from the US President on the National Broadband Plan*. Available online at: http://www.whitehouse.gov/the-press-office/statement-president-national-broadband-plan

[15] National Foundation for Women Legislators and National Organization of Black Elected Legislative Women. March 2011. Winning the Future: A Policy Framework for Empowering Women with Broadband. Available online at: http://www.broadbandmatters.org/wp-content/uploads/2010/10/2011-NFWL-and-NOBEL-Women-Joint-Broadband-Policy-Report-Winning-the-FutureFINAL.pdf

Appendix – Survey Questions and Summary Results[16]

1. High-speed Internet technology has entered many peoples' lives. How has it impacted you? (Base: 1389)
    - a. It improves my life.   93.1%
    - b. It has not impacted my life for better or worse.   6%
    - c. It has been detrimental to my life.   1%
2. How do you access the Internet? Check all that apply. (Base: 1394)
    - a. Desktop computer   80%
    - b. Laptop computer   74%
    - c. Smart phone   43%
    - d. Notebook/tablet computer   14%
    - e. Other (please specify)   5%
3. Where do you access the Internet? Check all that apply. (Base: 1393)
    - a. Work   69%
    - b. School   8%
    - c. Home   97%
    - d. Public library   13%
    - e. Various locations while traveling   56%
    - f. Other (please specify)   7%
4. On average, how often do you "log on" and use high-speed Internet? (Base: 1391)
    - a. Daily   94%
    - b. Several times a week   5%
    - c. Once a week   1%
    - d. Several times a month   <1%
    - e. Once a month   0%
    - f. Less than once a month   <1%
5. What type of connection(s) do you have to high-speed Internet? (Base: 1384)
    - a. Dial-up landline   3%
    - b. Fiber   11%
    - c. Cable   41%
    - d. DSL   40%
    - e. Satellite   4%
    - f. LAN/WAN   22%
    - g. Wireless   57%
    - h. Leased lines   <1%
    - i. I don't know   3%
6. How recently have you upgraded your technology connection? (Base: 1385)
    - a. Within the last month   14%
    - b. Within the last 3 months   17%
    - c. Within the last year   33%
    - d. Over a year ago   36%

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[16] These are the responses from all survey respondents. Of the 1400, only the "base number" replied to each question as noted. Subpopulation reports were generated (e.g. for mature women) but the individual question breakdown is not included in this report appendix.

7. What would you be interested in learning more about high-speed technology and options for access and use? (Base: 1298)
   a. Yes   44%
   b. No   56%
8. If you are interested in learning more about high-speed Internet technology and options for access and use, in what areas would you want more education? Check all that apply. (Base: 619)
   a. Different modes of Internet access   52%
   b. Speed   44%
   c. The technology itself   51%
   d. Pricing options   52%
   e. Who provides Internet access in your area   34%
9. What are the reasons that you use high-speed Internet? Check all that apply. (Base: 1303)
   a. Personal communications (e.g. family, friends, groups)   98%
   b. Home and recreation – online shopping, video games, movies, photos   84%
   c. News/research/finding information for personal use   89%
   d. Personal business (e.g. banking)   78%
   e. Online education and/or training courses   49%
   f. Political activity   33%
   g. Professional communications (e.g. co-workers, customers, vendors)   73%
   h. News/research/funding information for professional/business use   58%
   i. Identifying job opportunities and accessing career enhancement resources 43%
   j. Conducting business outreach and marketing   36%
   k. Finding (and acting on) government contracting opportunities   9%
10. What would you like to do using high-speed Internet that you cannot do now? (Base: 401)
    Assorted answers from 401 respondents. See trend analysis in report or contact BPWF for more details.
11. What would you need to be able to do so? (Base: 332)
    Assorted answers from 401 respondents. See trend analysis in report or contact BPWF for more details.
12. Have you ever pursued government contracts for your business? (Base: 1254)
    a. No, and I don't have any interest/need.   73%
    b. No, but I'd like to learn how to get money from the government.   16%
    c. Yes, I have done this on occasion.   9%
    d. Yes, I do this a great deal.   3%
13. Of the following, which component of high-speed Internet has had the GREATEST impact on your professional life? Choose one. (Base: 1144)
    a. Professional communications/connections   56%
    b. Access to jobs and employment related information   10%
    c. Research of and access to government contracting opportunities   10%
    d. Access to continuing education/professional development opportunities 11%
    e. Business marketing opportunities   5%
    f. Research about or conduct of home business opportunities   3%
    g. Work-life balance through home-based work opportunities (e.g. telecommuting) 15%

14. With respect to high-speed Internet access:

	Yes	No	I don't know	Base
Do you have options available to you?	86%	7%	7%	1289
Is it reasonably priced?	60%	27%	13%	1283
Is the speed fast enough?	71%	24%	5%	1284
Do you have sufficient provider options?	57%	27%	15%	1273
Do you have enough information to decide which provider option(s) is/are best for you?	59%	27%	14%	1282

15. Where do you live? (Base: 1295)

      a.   Region I. CT, ME, MA, NH, RI, VT   5%
      b.   Region II. NJ, NY, PR, VI   5%
      c.   Region III. DE, DC, MD, PA, VA, WV   29%
      d.   Region IV. AL, FL, GA, KY, MS, NC, SC, TN   18%
      e.   Region V. IL, IN, MI, MN, OH, WI   12%
      f.   Region VI. AR, LA, NM, OK, TX   9%
      g.   Region VII. IA, KS, MI, NE   4%
      h.   Region VIII. CO, MT, ND, SD, UT, WY   4%
      i.   Region IX. AZ, CA, HI, N, AS, GU, NMI, TTPI   9%
      j.   Region X. AK, ID, OR, WA   4%
      k.   Outside of the US   2%

16. How would you classify your area? (Base: 1284)
      a.   Urban/Suburban   75%
      b.   Rural   25%

17. What is your age range? (Base: 1283)

      a.   Under 20 years old   <1%
      b.   20-35 years old   11%
      c.   36-50 years old   23%
      d.   51-65 years old   47%
      e.   Over 65 years old   19%

18. What is your highest level of education? (Base: 1287)
      a.   Less than high school (or equivalent)   <1%
      b.   High school (or equivalent)   11%
      c.   Associates degree   15%
      d.   4-year degree   33%
      e.   Master's degree   29%
      f.   Post-graduate degree (e.g. doctorate, JD, MD)   9%

g. Certification   4%

19. Are you (or have you been) employed in a technology related field (e.g. communications or IT
    work)? (Base: 1284)
        a. Yes   22%
        b. No   47%
        c. No, but I use high-speed Internet access to perform my daily work   32%
20. Do you have any technology certifications? (Base: 1280)
        d. Yes   10%
        e. No   90%
21. What is your employment status? Check all that apply. (Base: 1244)
        a. Unemployed   4%
        b. Dropped out of the workforce temporarily   2%
        c. Not employed outside the home   2%
        d. Work for someone else (for profit, non-profit, government)   46%
        e. Executive in a for-profit, non-profit or government organization   11%
        f. Self-employed or own my own business   23%
        g. Active military (Including Guard and Reserve)   2%
        h. Retired   24%
22. Have you ever served in the military?
        a. Yes, I'm active (including Guard and Reserve)   3%
        b. Yes, I'm retired military   10%
        c. Yes, I'm a veteran   14%
        d. No   73%
23. What is your annual household income range?
        a. Less than $25,000   7%
        b. $25,000 to $49,999   17%
        c. $50,000 to $74,999   25%
        d. 75,000 to $99,999   17%
        e. $100,000 to $149,999   19%
        f. Over $150,000   15%