



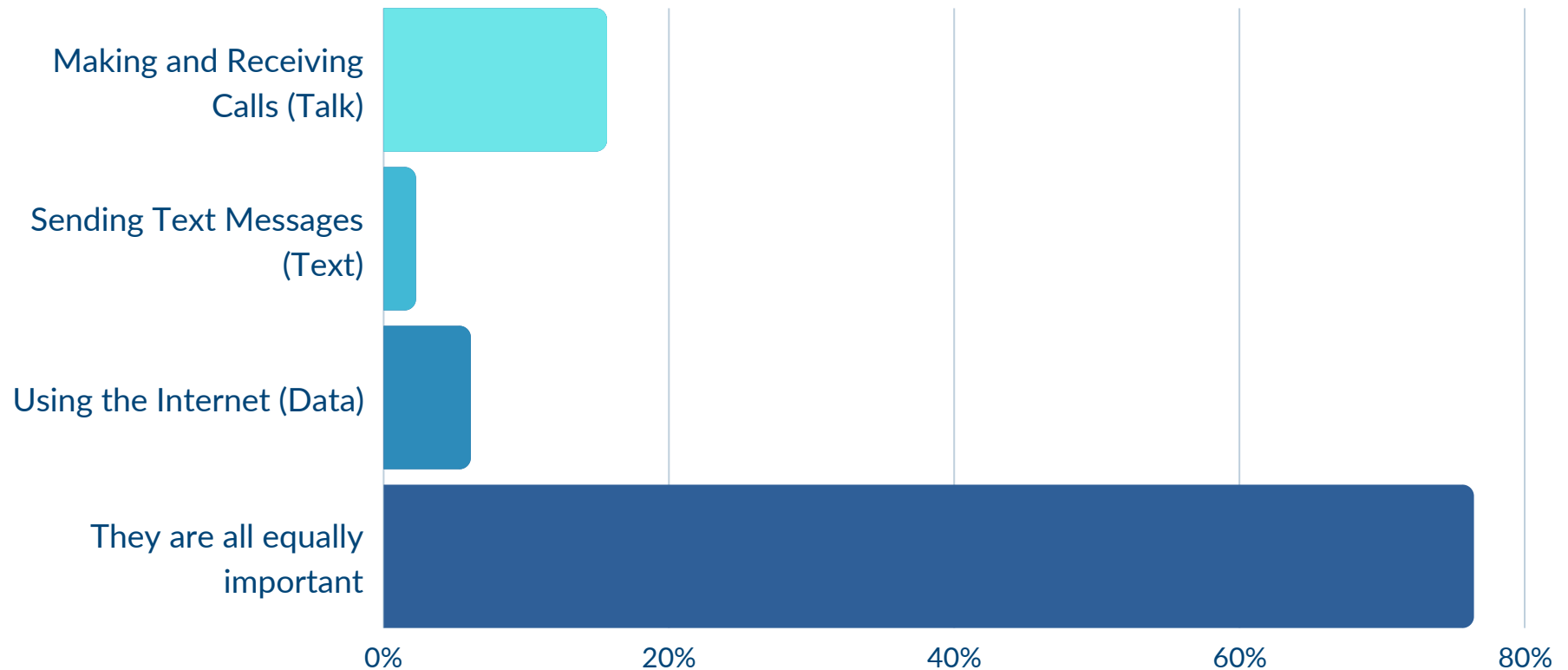
The Lifeline program and the Affordable Connectivity Program (ACP) serve a vital role in providing low-income Americans with affordable access to essential communication services. Between November 21 and December 8, 2022, the National Lifeline Association (NaLA) surveyed more than **60,000 customers** who use the Lifeline and/or ACP program about who they are and how they use the programs.

Survey results indicate that low-income consumers use Lifeline and/or ACP service to connect to family and to access other government programs, healthcare, jobs and online education.

**Consumers rely on subsidized mobile broadband access to participate equally in all facets of daily life.**

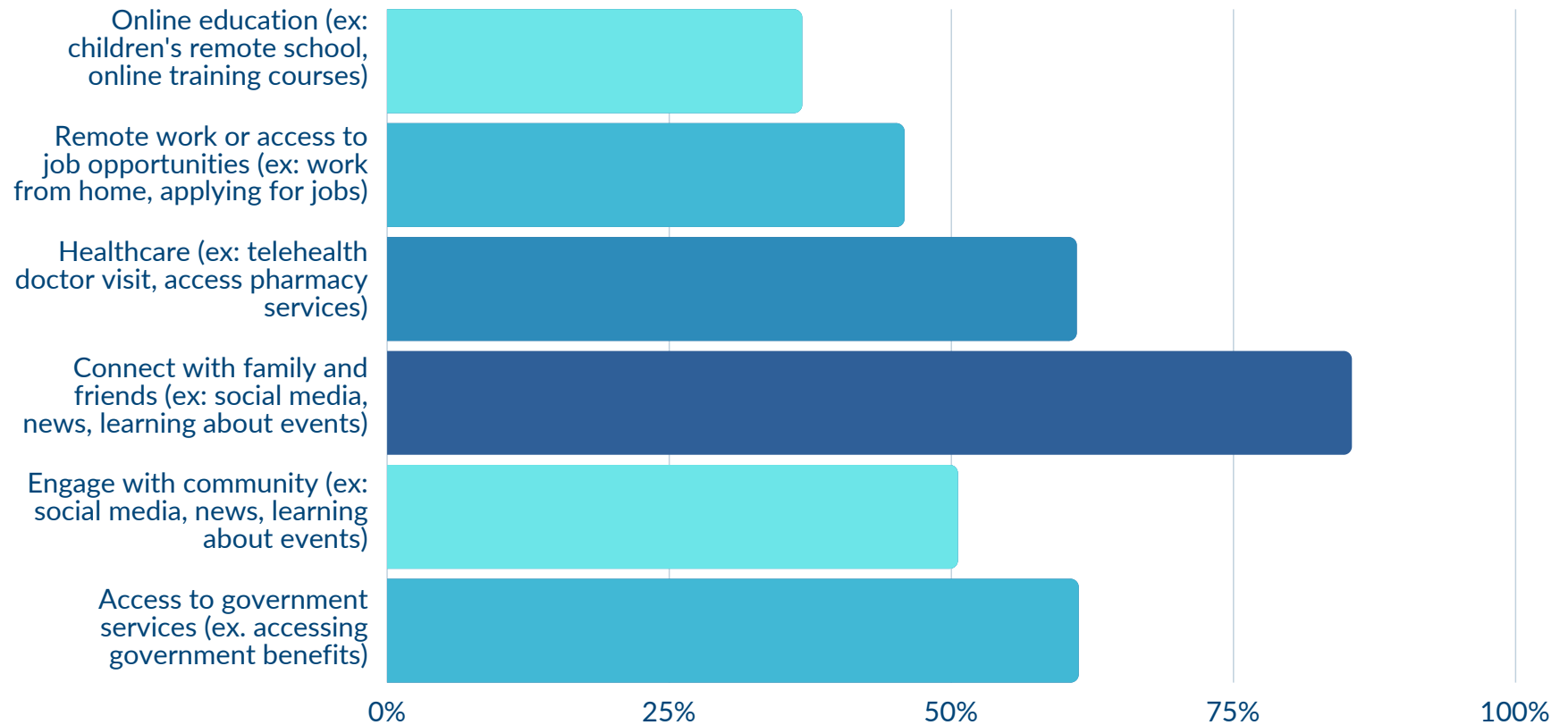


## What is the single most important part of the Lifeline and/or Affordable Connectivity Program (ACP) service you receive?



**Consumers pick voice as the most important form of communications; though respondents value access to voice, text and data equally.** Nearly 80% say access to voice, text and data are equally important. Voice and text are as essential as broadband to low-income consumers.

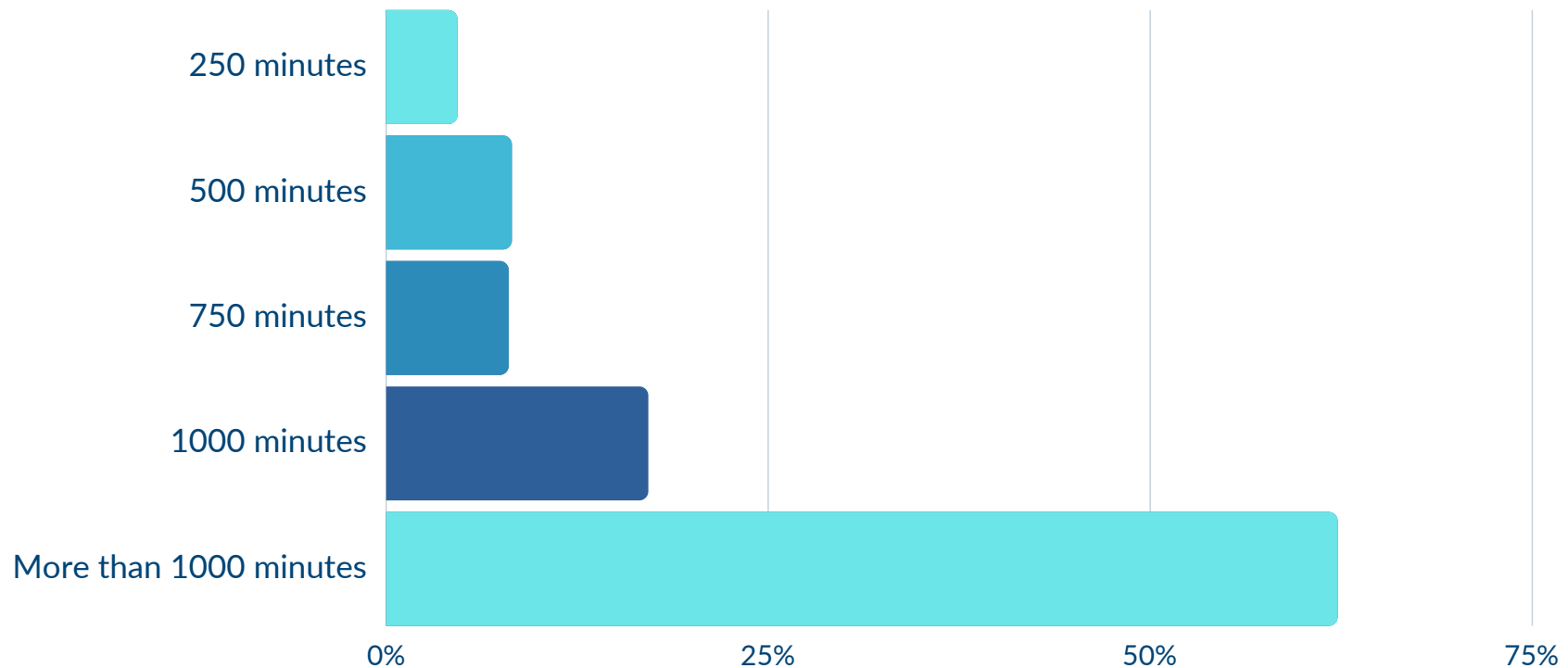
## For what purposes do you and your family use your Lifeline and/or ACP Talk, Text, and Data services (check all that apply)



**Low-income consumers use Lifeline and/or ACP service to connect to family and to access other government programs, healthcare, jobs and online education.** Consumers rely on subsidized mobile broadband access to participate equally in all facets of daily life.

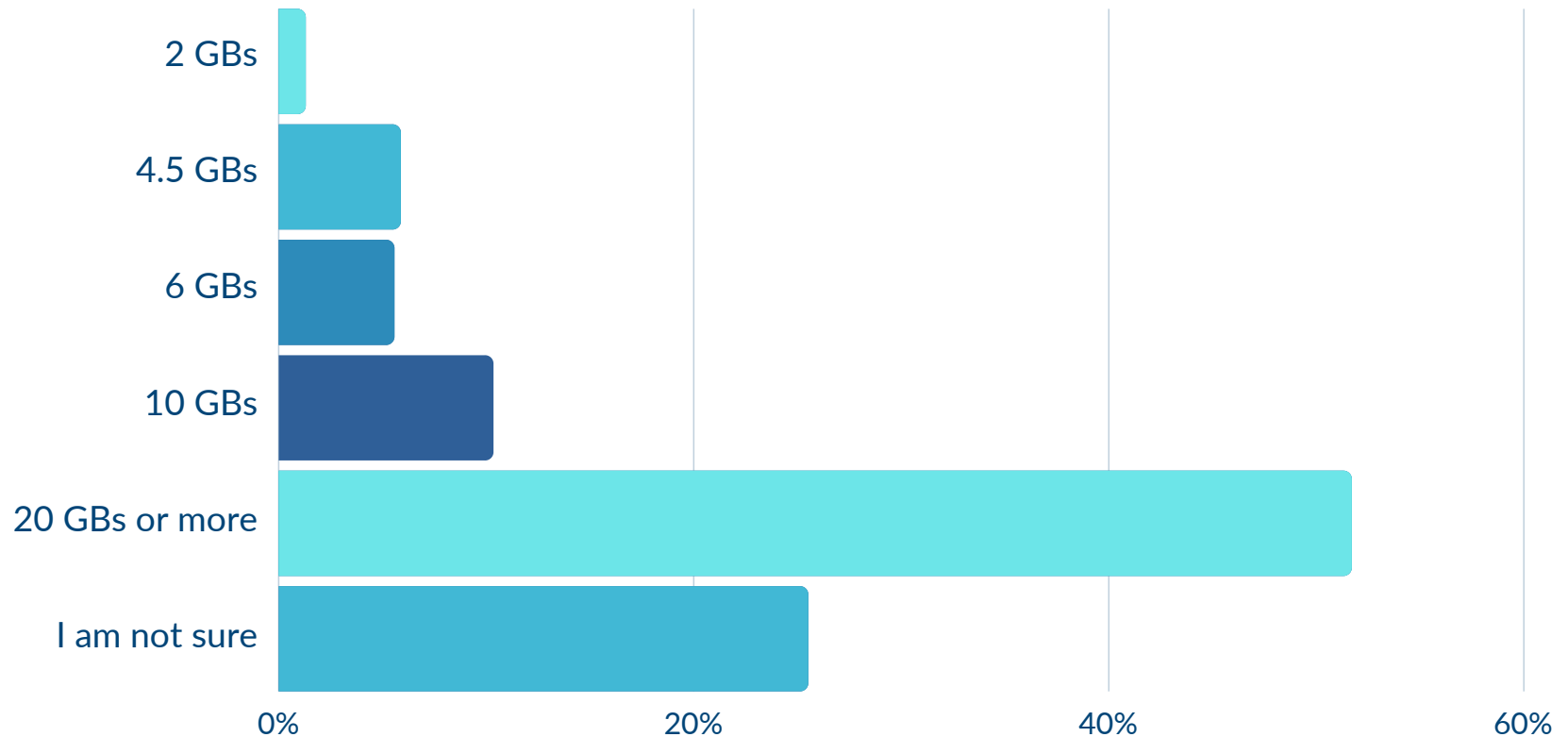
- Nearly two-thirds of all Lifeline/ACP subscribers use their service to connect to government programs
- Nearly two-thirds of all Lifeline/ACP subscribers use their service to access healthcare

Which quantity of talk minutes for voice service is enough each month to ensure you and your family can make and receive calls as needed every month?



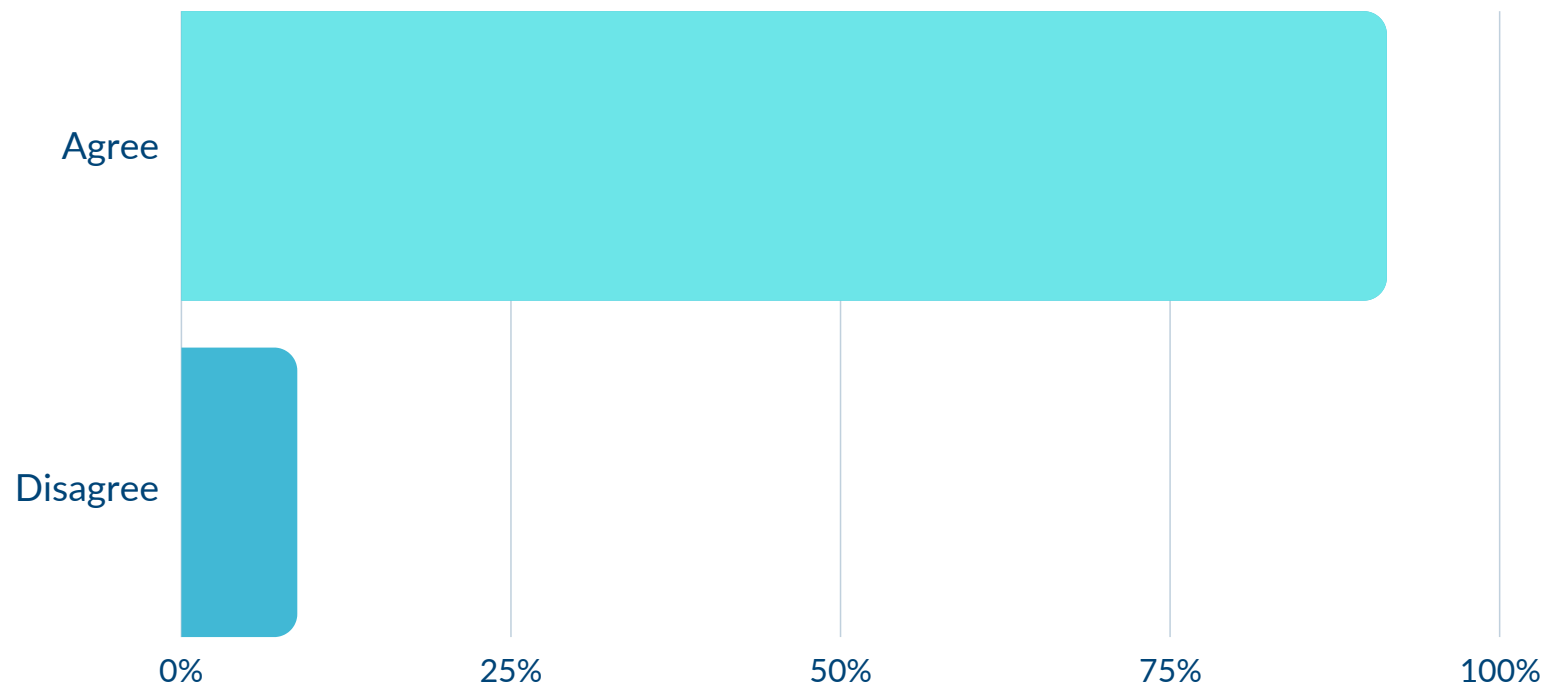
**Low-income consumers want to be sure that they have access to voice service all month long.** Reduced support for voice service and the ban on access to a voice dialer on an ACP supported connected device are at odds with consumers' needs.

Which quantity of data for internet service is enough each month to ensure you and your family can access online services as needed?



**Low-income consumers want to be sure that their households have access to broadband service all month long.** Benefits with one-per-household limits leave multi-person households at a disadvantage.

Do you agree with the following statement — "I try not to use all of, or nearly all of, my allotted data because my data is capped and I want to make sure I have access to download toward the end of the month if I need it and I can't afford to purchase more."

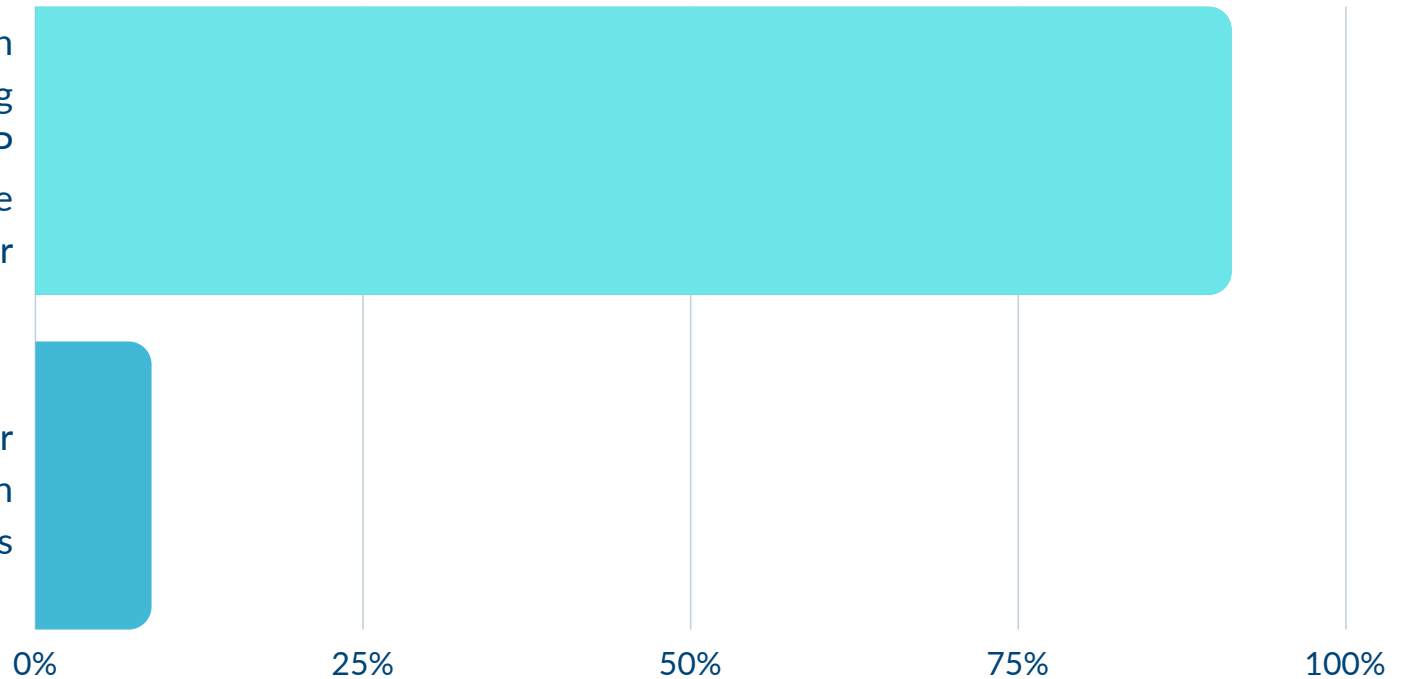


**More than 90% of low-income consumers ration their data usage to ensure they have access all month long.** Low-income household usage is not reflective of low-income household broadband data needs.

## Which would you prefer?

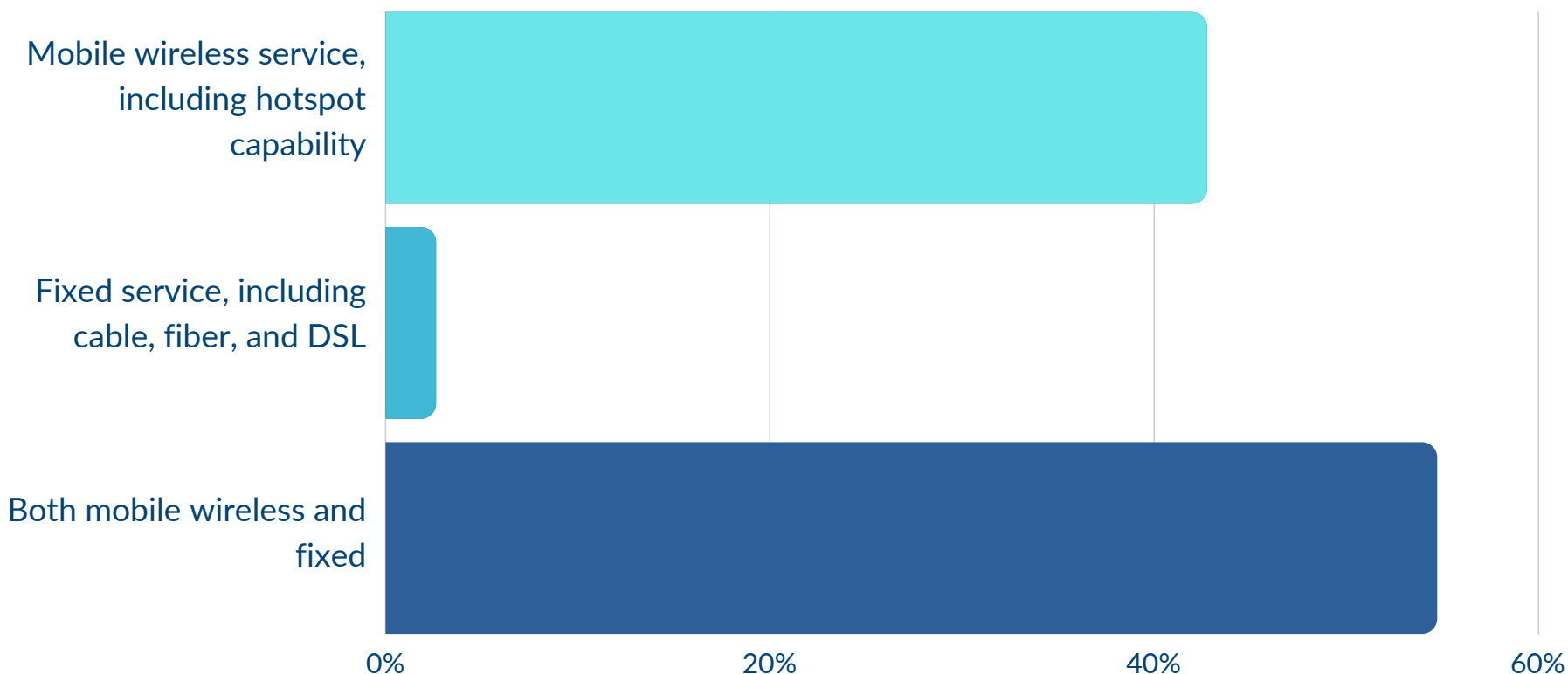
To receive a plan with more data by applying Lifeline and ACP discounts to a single device and service; or

To receive two smaller plans with less data on two separate devices



**More than 90% of low-income consumers prefer to combine Lifeline and ACP support in order to get more robust service plans on a single device. Consumers should be free to combine available Lifeline and ACP benefits – a practice that is currently prohibited only in California.**

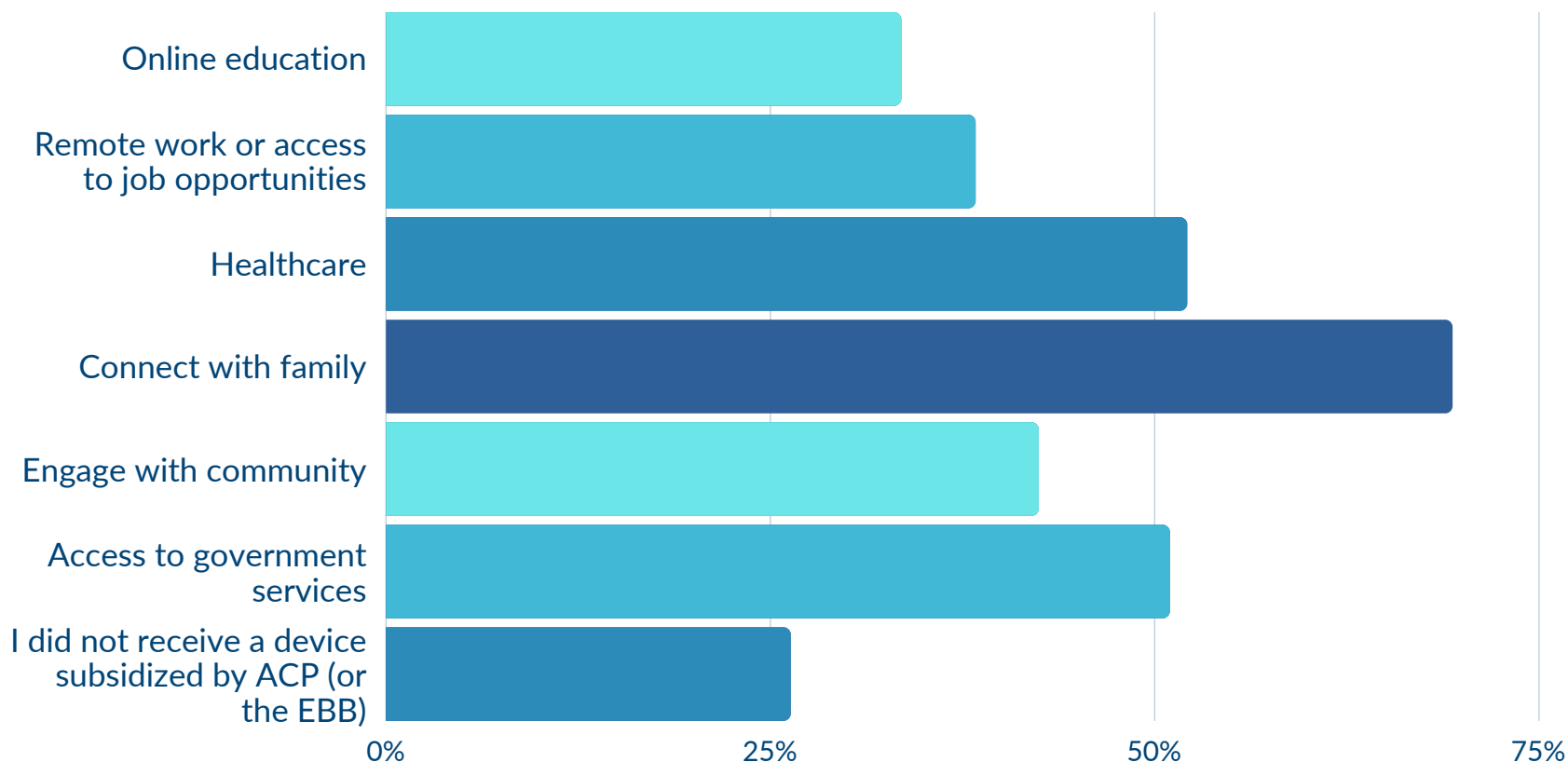
## Which service best meets the broadband/internet access/data needs of your household?



**More than half of those surveyed said they would choose to have mobile and fixed broadband service if they could afford both, but 43% said mobile wireless services best meet their household needs. Only 2.5% of those surveyed say fixed broadband alone would suffice.**

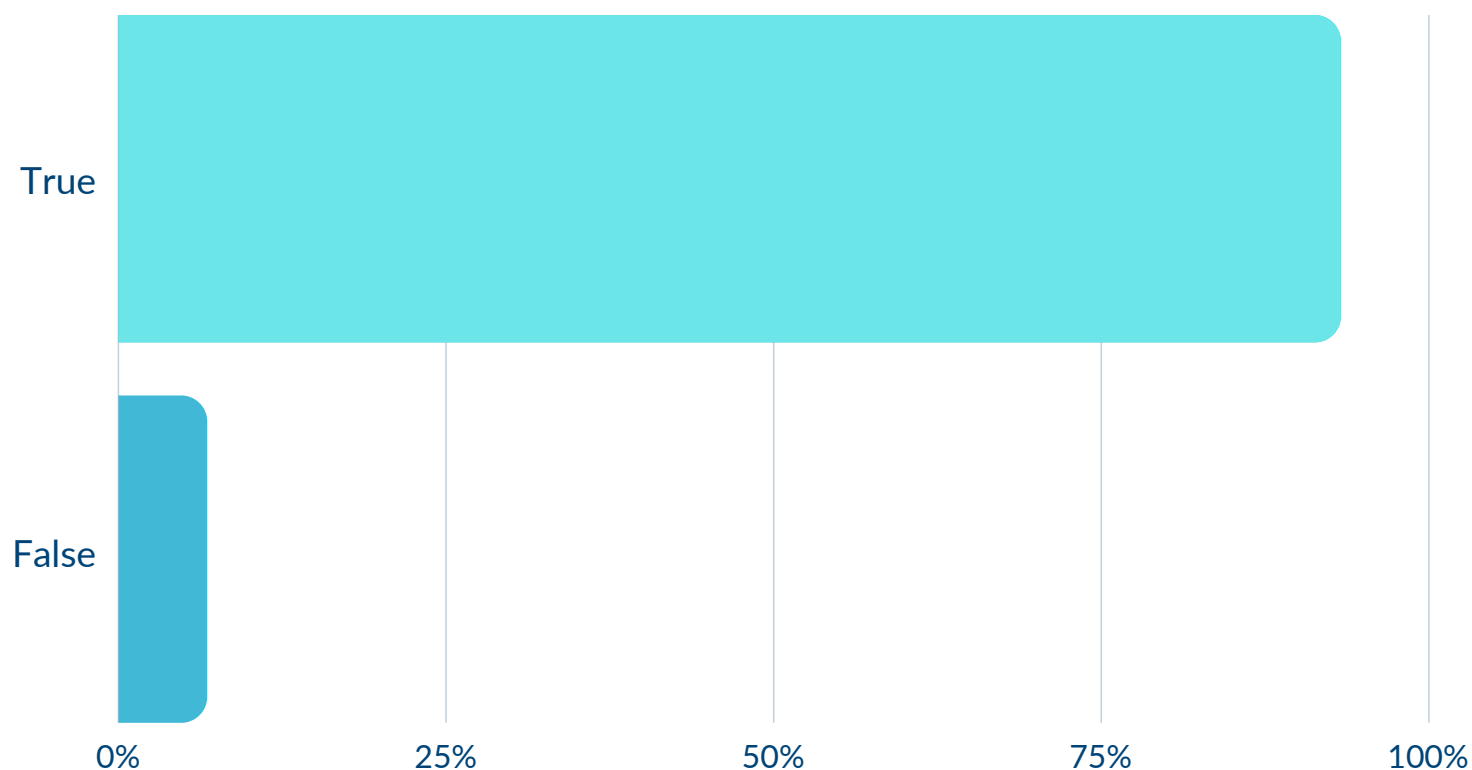


If you received a device subsidized by the Emergency Broadband Benefit or the ACP, for what purpose did you use the device (check all that apply)?



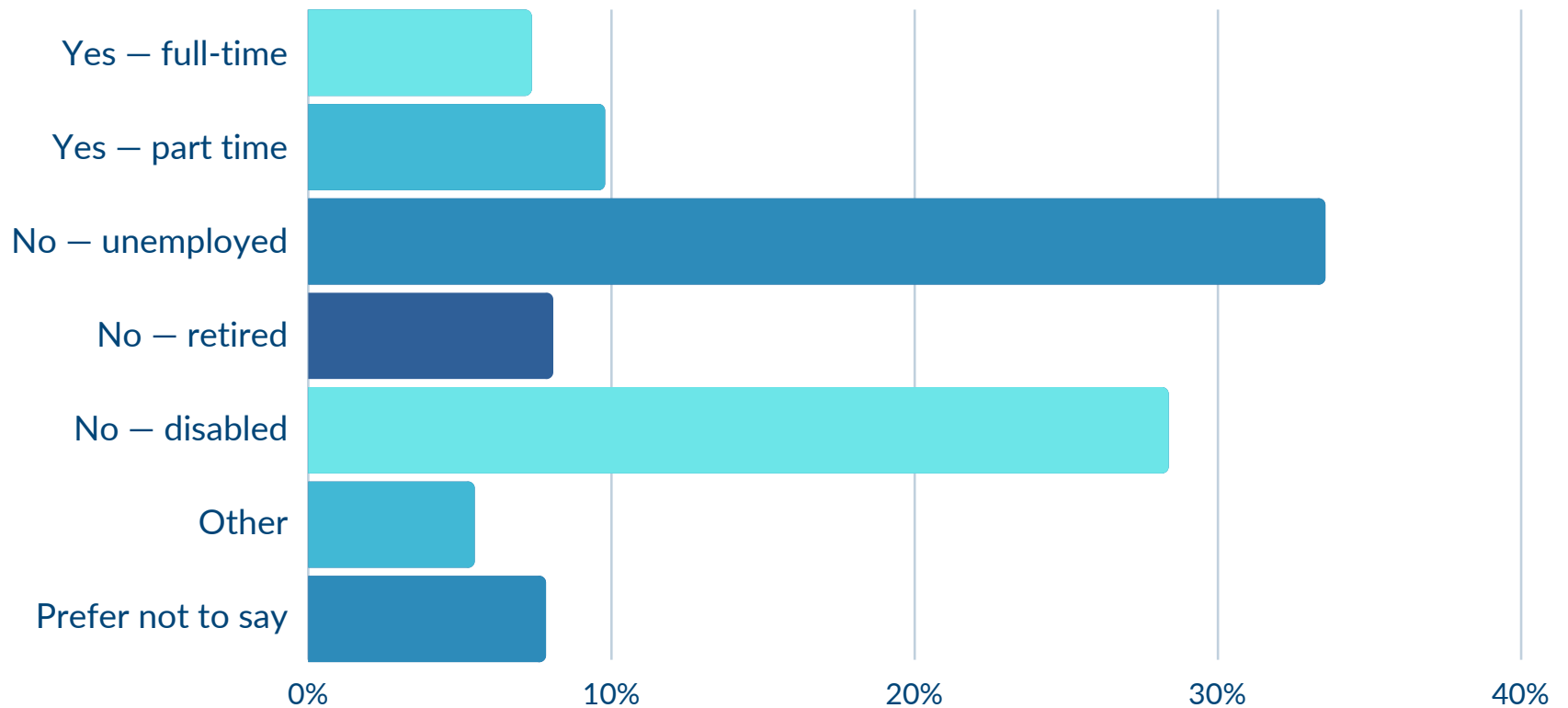
**More than half of subscribers use their ACP-supported connected device to connect to healthcare, government services and family.** More than a third of subscribers use their ACP-supported device to connect to community, remote work or access to jobs, and online education.

I am not able to afford any additional monthly payments toward my Lifeline and/or ACP service.



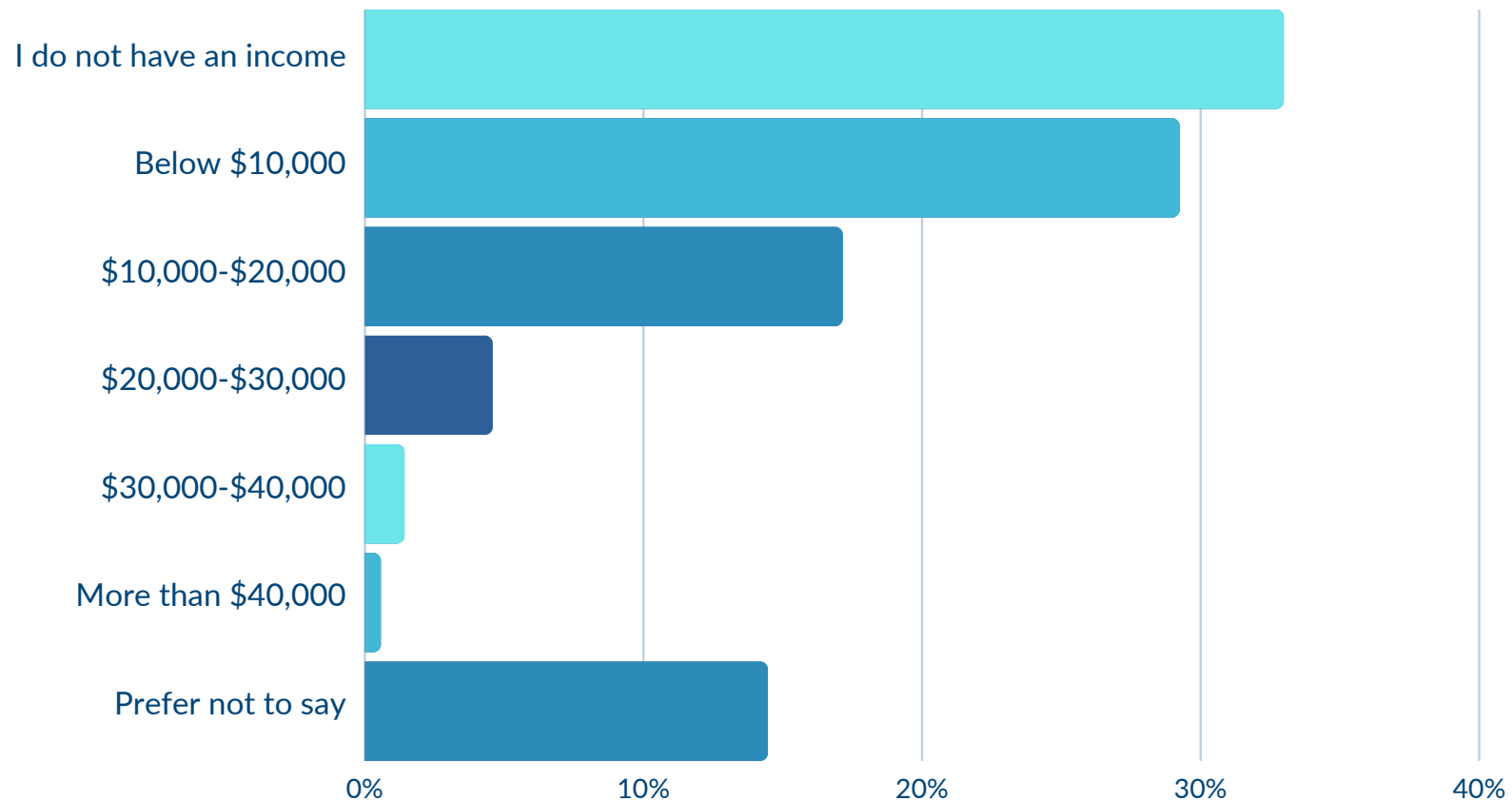
**Nearly 95% of Lifeline/ACP subscribers say they are unable to afford a co-pay for their monthly service.** Free service offerings are the most effective means of ensuring that low-income consumers can get and stay connected.

## Are you currently employed?



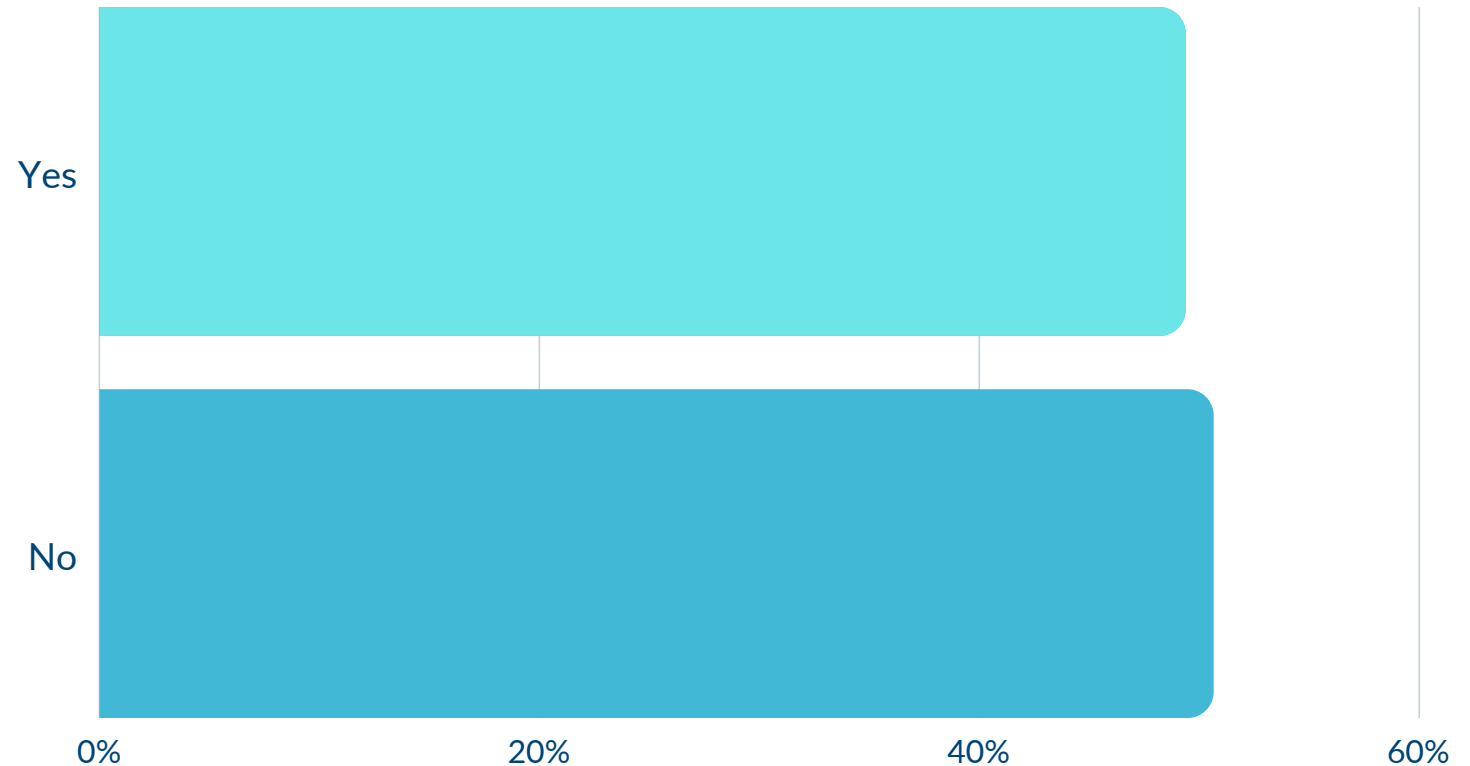
**More than two-thirds of Lifeline/ACP subscribers are unemployed, disabled or retired. Fewer than 10% of Lifeline/ACP subscribers have full-time employment.**

## What is your approximate annual household income?



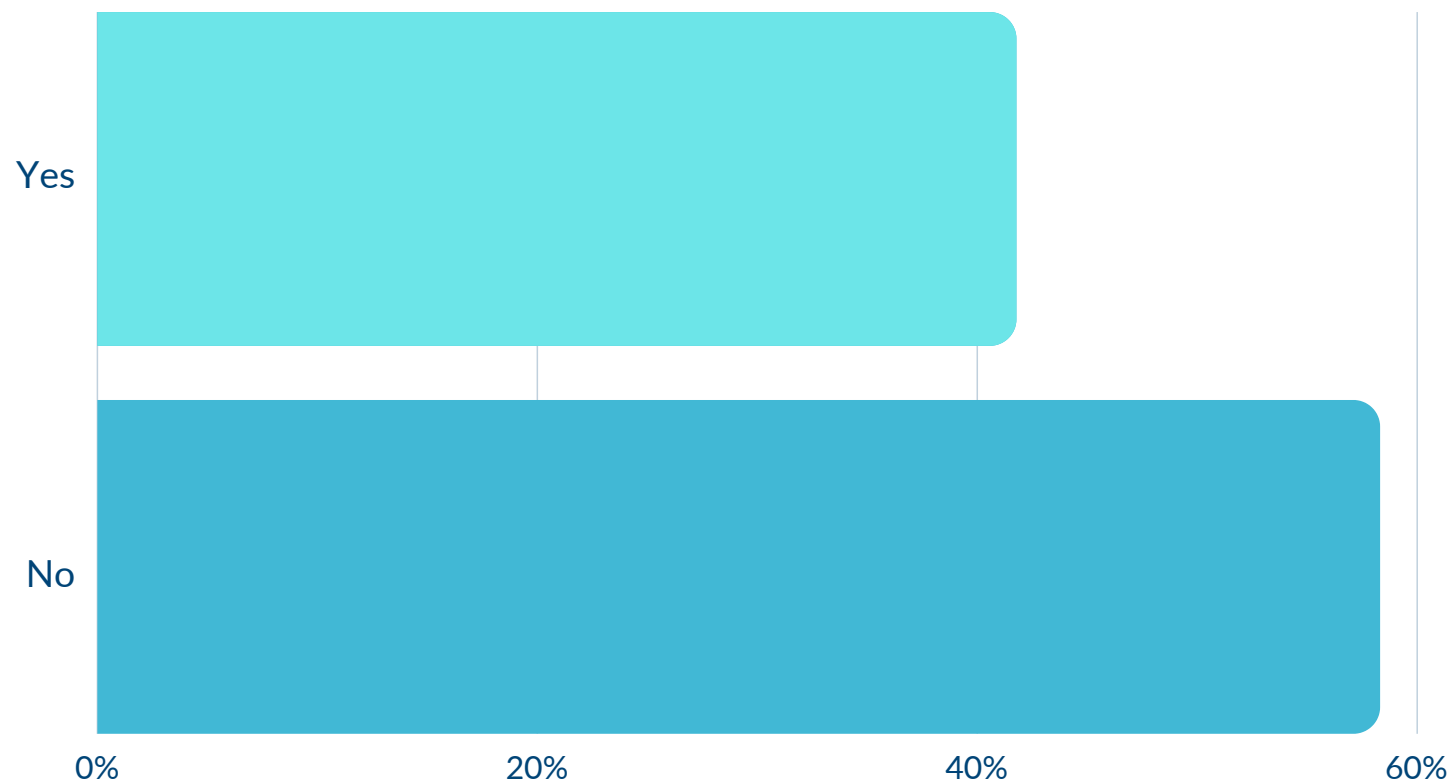
**At least 60% of Lifeline/ACP subscribers live below the poverty line, with annual household incomes of less than \$10,000.**

Do you currently have a debit and/or credit card?



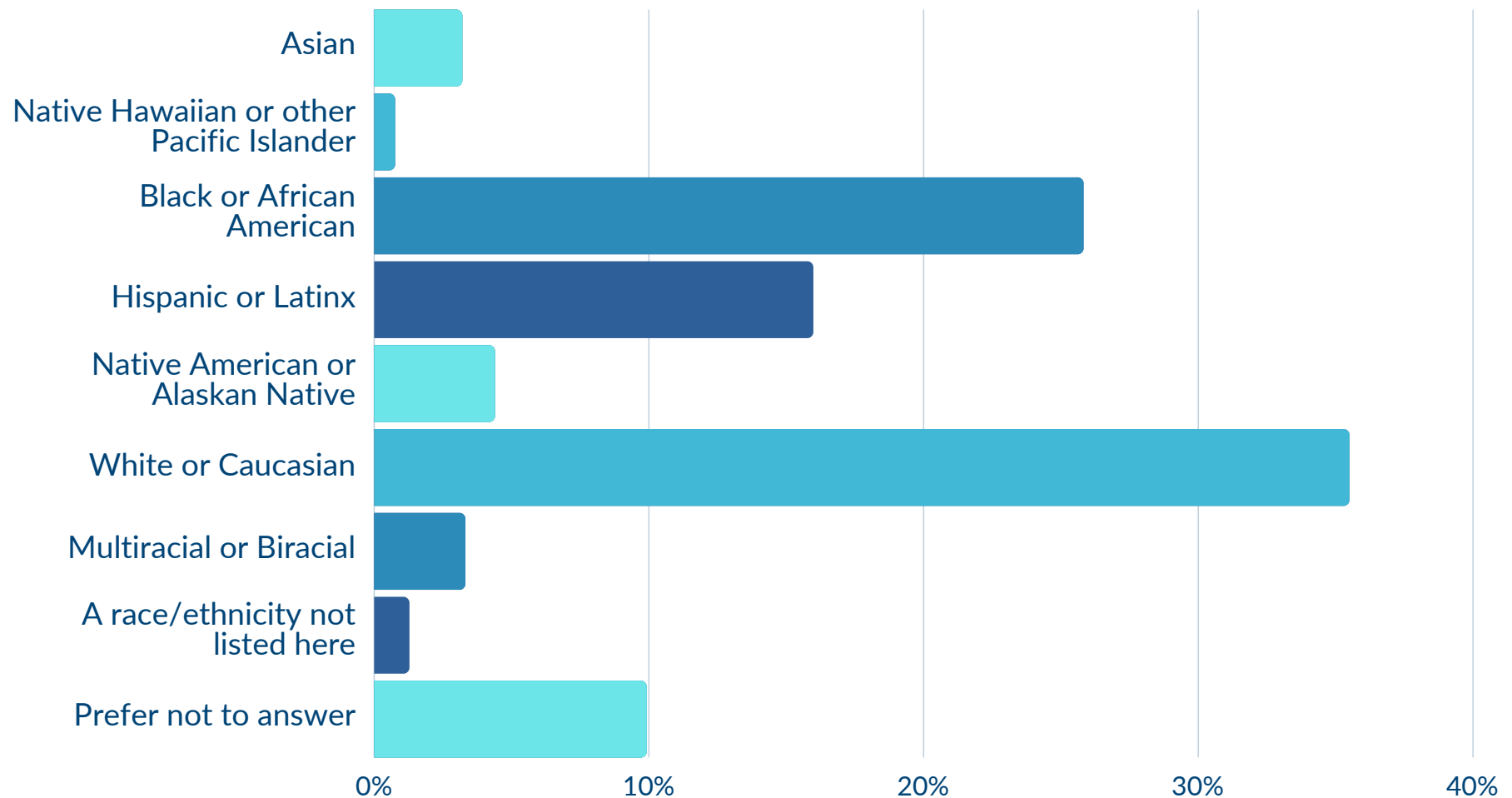
**Most Lifeline/ACP subscribers have neither a credit card nor debit card.**

Do you currently have a checking or savings account?

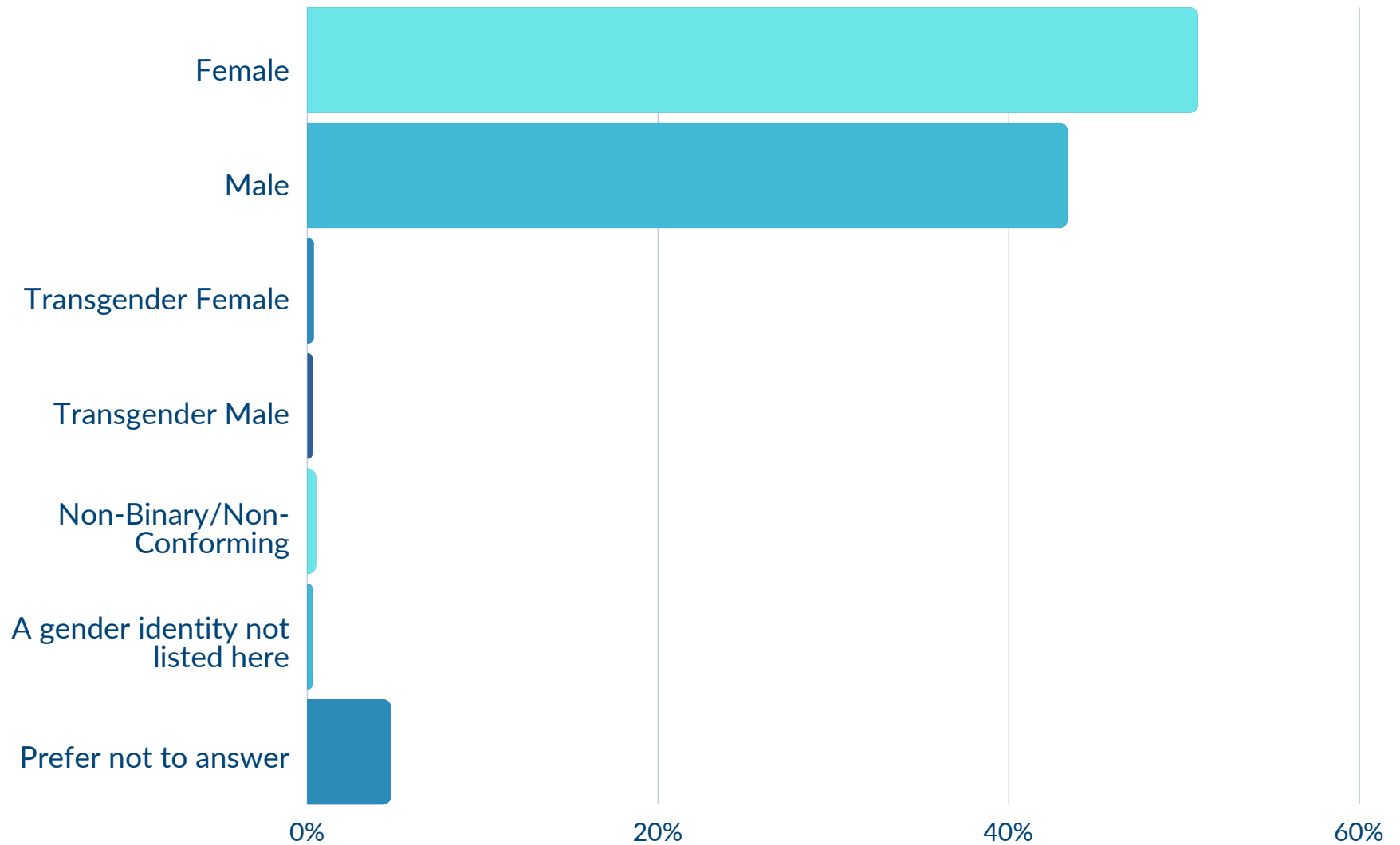


**Most Lifeline/ACP subscribers are unbanked.**

## Which of the following best describes your race/ethnicity?



## With which gender identity do you most identify?





## What is your current age?

