

## Topline Questionnaire

**HOME4NW** Do you currently subscribe to internet service at HOME?<sup>3</sup>

Based on all internet users [N=1,740]

	YES	NO	(VOL.) DON'T KNOW	(VOL.) REFUSED
Current	84	16	*	0
April 2015	89	11	*	0
September 2013	90	10	*	*
August 2013	89	11	0	0
May 2013	90	10	0	*
December 2012	90	10	0	0
November 2012	90	10	0	*
April 2012	89	11	0	0
February 2012	90	10	*	*
August 2011	90	10	0	0
May 2011	88	12	0	*
January 2011	89	11	*	0
December 2010	95	4	*	*
November 2010	95	4	*	*
September 2010	95	5	*	*
May 2010	94	6	*	*
January 2010	94	6	*	*
December 2009	93	6	*	*
September 2009	92	6	*	*
April 2009	91	8	*	*
December 2008	92	6	*	*
November 2008	93	7	*	*
August 2008	93	7	*	--
July 2008	93	7	*	--
May 2008	95	6	*	--
December 2007	94	7	*	--
September 2007	93	6	*	--
February 2007	95	5	*	--

<sup>3</sup> April 2015 trend includes respondents who use a social networking site or app. Unless otherwise indicated, question wording was: "Do you ever use the internet or email at HOME?" In December 2012, question wording was: "Do you ever use the internet AT HOME?" In January 2011 and May 2011, question wording was: "Do you ever use the internet or email from home?" December 2010 and earlier trend wording was as follows: "About how often do you use the internet or email from... HOME – several times a day, about once a day, 3-5 days a week, 1-2 days a week, every few weeks, less often or never?" Results shown here for "YES" reflect combined "Several times a day," "About once a day," "3-5 days a week," "1-2 days a week," "Every few weeks," and "Less often" responses. Results shown here for "NO" reflect "Never" responses.

**BBHOME1** Do you subscribe to dial-up internet service at home... OR do you subscribe to a higher-speed broadband service such as DSL, cable, or fiber optic service?<sup>4</sup>

**BBHOME2** [ASK IF BBHOME1=DIAL-UP:] Just to confirm, you use a dial-up connection to the internet at home, and not a higher-speed broadband connection?

Based on home internet subscribers

	DIAL-UP	HIGHER SPEED	(VOL.) BOTH DIAL-UP AND HIGHER SPEED	(VOL.) ACCESS NET ON CELL OR TABLET ONLY	(VOL.) NO HOME NET ACCESS	(VOL.) NONE OF THE ABOVE <sup>5</sup>	(VOL.) DK	(VOL.) REF.
Current [N=1,509]	3	91	1	*	1	n/a	4	*
April 2015 [N=1,544]	6	85	*	2	2	n/a	4	1
Sept 2013 [N=4,875]	3	91	n/a	3	1	*	2	*
May 2013 [N=1,727]	4	92	n/a	1	1	*	2	*
Dec 2012 [N=1,645]	4	90	n/a	2	*	*	3	1
Nov 2012 [N=1,770]	4	88	n/a	2	*	*	4	*
April 2012 [N=1,631]	4	90	n/a	1	*	*	4	*
Feb 2012 [N=1,572]	4	90	n/a	2	*	1	3	*
Aug 2011 [N=1,565]	5	89	n/a	1	1	1	3	*
May 2011 [N=1,518]	6	88	n/a	n/a	n/a	1	3	1
Jan 2011 [N=1,610]	4	88	n/a	n/a	n/a	2	4	1
Dec 2010 [N=1,731]	6	85	n/a	n/a	n/a	2	6	2
Nov 2010 [N=1,560]	6	86	n/a	n/a	n/a	2	4	2
Sept 2010 [N=1,947]	7	86	n/a	n/a	n/a	2	4	1
May 2010 [N=1,659]	7	86	n/a	n/a	n/a	2	4	1
Jan 2010 [N=1,573]	7	88	n/a	n/a	n/a	1	3	1
Dec 2009 [N=1,582]	9	86	n/a	n/a	n/a	2	4	1
Sept 2009 [N=1,584]	7	87	n/a	n/a	n/a	2	3	2
April 2009 [N=1,567]	9	86	n/a	n/a	n/a	2	3	1
Dec 2008 [N=1,538]	13	80	n/a	n/a	n/a	1	5	--
Nov 2008 [N=1,481]	12	82	n/a	n/a	n/a	1	5	--
Aug 2008 [N=1,543]	13	81	n/a	n/a	n/a	1	5	--
July 2008 [N=1,797]	14	81	n/a	n/a	n/a	1	4	--
May 2008 [N=1,463]	15	79	n/a	n/a	n/a	1	5	--
Dec 2007 [N=1,483]	18	77	n/a	n/a	n/a	1	3	--
Sept 2007 [N=1,575]	20	73	n/a	n/a	n/a	1	6	--
Feb 2007 [N=1,406]	23	70	n/a	n/a	n/a	1	6	--
Aug 2006 [N=1,787]	28	68	n/a	n/a	n/a	1	3	--
Dec 2005 [N=1,715]	35	61	n/a	n/a	n/a	1	3	--
June 2005 [N=1,204]	44	53	n/a	n/a	n/a	1	1	--

<sup>4</sup> Prior to June 2015, question was asked of home internet users, rather than home internet subscribers. In April 2015, question wording was: "Is your internet connection AT HOME through a slow-speed link such as dial-up... OR do you have a high-speed, broadband link" Prior to April 2015, trends asked about specific types of home broadband connections such as DSL, cable modem, wireless broadband/satellite, fiber optic, T-1 or other high-speed access.

<sup>5</sup> May 2011 and earlier trend percentages for "None of the above" reflect "Other (SPECIFY)" responses.

**BBHOME3** Thinking about all of the different information sources available to people... [INSERT FOR FIRST TWO RANDOMIZED ITEMS: Do you think people who do NOT have high-speed internet access at home are at a disadvantage when it comes to... [INSERT ITEMS; RANDOMIZE]?] [IF YES, ASK: Would you say it is a MAJOR disadvantage or a MINOR disadvantage?]

How about...[INSERT NEXT ITEM]? [READ AS NECESSARY: Are people who do NOT have high-speed internet access at home at a disadvantage when it comes to this?] [IF YES, ASK: Would you say it is a MAJOR disadvantage or a MINOR disadvantage?]

	MAJOR DIS- ADVANTAGE	MINOR DIS- ADVANTAGE	NOT AT A DIS- ADVANTAGE	(VOL.) DK	(VOL.) REF.
a. Keeping up with news and information					
Current	36	27	34	2	*
May 2010	23	27	47	3	*
b. Finding out about job opportunities or gaining new career skills					
Current	52	19	25	4	1
May 2010	43	23	28	5	1
c. Learning about or accessing government services <sup>6</sup>					
Current	46	23	25	6	1
May 2010	29	27	37	7	*
d. Getting health information					
Current	43	23	30	3	1
May 2010	34	28	35	3	1
e. Learning new things that might improve or enrich their lives					
Current	44	26	26	4	1
May 2010	31	31	32	5	1

<sup>6</sup> May 2010 trend item wording was "Using government services"

**SMART1** Some cellphones are called “smartphones” because of certain features they have. Is your cellphone a smartphone such as an iPhone, Android, Blackberry or Windows phone, or are you not sure?<sup>7</sup>

Based on cellphone owners

	YES, SMARTPHONE	NO, NOT A SMARTPHONE	NOT SURE/ DON'T KNOW	(VOL.) REFUSED
Current [N=1,903]	73	20	7	*
April 2015 [N=1,900]	73	21	5	*
September 2013 [N=5,763]	61	32	7	*
August 2013 [N=1,636]	60	33	6	*
May 2013 [N=2,076]	55	39	5	*
December 2012 [N=1,954]	52	41	6	*
November 2012 [N=1,992]	55	38	6	*
September 2012 [N=2,581]	53	40	6	*
April 2012 [N=1,954]	46	44	10	*
February 2012 [N=1,961]	45	46	8	*
May 2011 [N=1,914]	33	53	14	*

**Q4** What is the MAIN reason you don't own a smartphone? [PRECODED OPEN-END; DO NOT READ]

Based on those whose cellphone is not a smartphone

	CURRENT		APRIL 2012
%	32	Too expensive (general)	29
	26	Don't need one	29
	11	Just not interested / Just don't want one	4
	9	Too complicated / Don't know how to use it	9
	4	No reason / Just haven't gotten around to it	n/a
	3	Phone is too expensive	4
	3	Happy with current phone	3
	2	Only use phone for calling/texting	2
	2	Plan to get one / Waiting for current contract to expire / Waiting for discount or upgrade eligibility	2
	1	Data plan is too expensive	3
	1	Don't know what it is / Don't know how to get one	n/a
	*	Prefer to be less connected	1
	*	Worried about radiation or risk of cancer	0
	*	Worried about privacy/tracking	*
	n/a	Service not available where I live	*
	5	Other (SPECIFY)	10
	1	Don't know	3
	1	Refused	1

<sup>7</sup> Wording may vary from survey to survey. Wording variations include: “Some cellphones are called “smartphones” because of certain features they have. Is your cellphone a smartphone, such as an iPhone, Android, Blackberry or Windows phone, or are you not sure?”; “Some cellphones are called “smartphones” because of certain features they have. Is your cellphone a smartphone or not, or are you not sure?”

[n=576]

[n=1,156]

**BBSMART1** You said that you [IF SMART1=YES, SMARTPHONE, INSERT: have a smartphone, but] do not have a high-speed internet connection at home. Did you EVER at some point in the past have a broadband internet subscription at home?

Based on non-broadband users [N=605]

	<u>CURRENT</u>	
%	36	Yes, had broadband
	59	No, did not have broadband
	4	(VOL.) Don't know
	1	(VOL.) Refused

**BBSMART2** Would you like to have high-speed internet at home [IF BBSMART1=YES, HAD BROADBAND AT HOME IN THE PAST, INSERT: again], or is that not something you're interested in?

Based on non-broadband users [N=605]

	<u>CURRENT</u>	
%	25	Yes, interested
	70	No, not interested
	3	(VOL.) Don't know
	2	(VOL.) Refused

**BBSMART3** Please tell me whether any of the following are reasons why you do not have high-speed internet at home. First, how about [INSERT ITEMS; RANDOMIZE; ITEM f ALWAYS LAST]? Is this a reason why you do not have high-speed internet at home?

Next, what about [INSERT NEXT ITEM]? [IF NECESSARY: Is this a reason why you do not have broadband service at home?]

Items A, B, D, E, F: Based on non-broadband users [N=605]

Item C: Based on non-broadband users who have a smartphone [N=244]

	YES	NO	(VOL.) DON'T KNOW	(VOL.) REFUSED
a. The monthly cost of a home broadband subscription is too expensive	59	34	4	2
b. The cost of a computer is too expensive	45	50	3	2
c. Your smartphone lets you do everything online that you need to do	65	29	4	3
d. You have other options for internet access outside of your home	46	50	2	2
e. Broadband service is not available where you live, or is not available at an acceptable speed	23	63	13	2
f. Some other reason I haven't already mentioned (SPECIFY)	25	69	5	2

**BBSMART4** Thinking of the reasons why you do not have broadband service at home, which of them is the MOST important? Is it that [READ; ONLY INCLUDE "YES" RESPONSES FROM BBSMART3; LIST RESPONSES IN SAME ORDER AS BBSMART3]?<sup>8</sup>

Based on non-broadband users [N=605]

	CURRENT	
%	33	The monthly cost of a home subscription is too expensive
	12	Your smartphone lets you do everything online that you need to do
	10	The cost of a computer is too expensive
	10	You have other options for internet access outside of your home
	5	Broadband service is not available where you live, or is not available at an acceptable speed
	16	Or some other reason
	3	(VOL.) Don't know BBSMART4
	3	(VOL.) Refused BBSMART4
	9	None is a reason

<sup>8</sup> Question was asked of respondents who gave two or more "Yes" responses in BBSMART3. Results shown here also include respondents who gave only one "Yes" response in BBSMART3.

**CABLE1** Do you currently receive television via cable or satellite at home, or not?

	<u>CURRENT</u>	
%	76	Yes
	24	No
	*	(VOL.) Don't know
	0	(VOL.) Refused

**CABLE2** Did you ever subscribe to a cable or satellite television package at home at some point in the past?

Based on those who do not subscribe to cable or satellite TV at home/DK [N=423]

	<u>CURRENT</u>	
%	62	Yes, did subscribe
	38	No, did not subscribe
	*	(VOL.) Don't know
	0	(VOL.) Refused

**CABLE3** Please tell me whether any of the following are reasons you do not currently have a cable or satellite television subscription at home. (First,/Next,) [INSERT ITEMS; RANDOMIZE]? [READ FOR FIRST ITEM THEN IF NECESSARY: Is this a reason why you do not have a cable or satellite television subscription?]

Based on those who do not subscribe to cable or satellite TV at home/DK [N=423]

	<u>YES</u>	<u>NO</u>	<u>(VOL.) DON'T KNOW</u>	<u>(VOL.) REFUSED</u>
a. You do not often watch television	46	51	2	1
b. The cost of cable or satellite service is too expensive	71	28	*	1
c. You can access the content you want to watch online, using a streaming TV or movie service, or using an over the air antenna	64	33	2	1

## Appendix:

*% of adults who have home broadband*

	2013		2015		Change (percentage points)
	Broadband at home	Unweighted number of cases	Broadband at home	Unweighted number of cases	
All					
	70%	6,010	67%	6,687	-3
<b>Gender</b>					
Male	70%	2,733	66%	3,367	-4
Female	70%	3,277	67%	3,320	-3
<b>Parents</b>					
Parents	77%	1,533	73%	1,678	-4
Non-parents	67%	4,449	64%	4,976	-3
<b>Race/Ethnicity</b>					
White	74%	4,223	72%	4,536	-2
African American	62%	664	54%	741	-8
Hispanic	56%	682	50%	888	-6
<b>Age</b>					
18-29	81%	945	75%	1,118	-6
30-49	77%	1,590	74%	1,830	-3
50-64	68%	1,842	65%	1,928	-3
65+*	47%	1,526	45%	1,688	-2
<b>Income</b>					
Under \$20K	46%	1,048	41%	1,221	-5
\$20K to \$50K	67%	1,664	63%	1,752	-4
\$50 to \$75K	85%	787	80%	868	-5
\$75K to \$100K	88%	634	88%	688	0
Over \$100K*	93%	1,010	91%	1,222	-2
<b>Education</b>					
High school grads or less	50%	2,121	47%	2,219	-3
Some college /associate degree	80%	1,627	75%	1,718	-5
College +	90%	2,225	87%	2,704	-3
<b>Geography</b>					
Rural	60%	1,180	55%	1,247	-5
Urban*	70%	1,850	67%	2,167	-3
Suburban	74%	2,980	70%	3,273	-4
Note: * signifies that 2013-2015 differences are <b>not</b> statistically significant					



*% of adults who are smartphone-only*

COMBINED	2013		2015		Change (percentage points)
	Smartphone only	Unweighted number of cases	Smartphone only	Unweighted number of cases	
All					
	8%	6,010	13%	6,687	+5
Gender					
Male	9%	2,733	14%	3,367	+5
Female	8%	3,277	13%	3,320	+5
Parents					
Parents	10%	1,533	17%	1,678	+7
Non-parents	8%	4,449	12%	4,976	+4
Race/Ethnicity					
White	6%	4,223	10%	4,536	+4
African American	10%	664	19%	741	+9
Hispanic	16%	682	23%	888	+7
Age					
18-29	12%	945	19%	1,118	+7
30-49	9%	1,590	16%	1,830	+7
50-64	7%	1,842	11%	1,928	+4
65+	3%	1,526	7%	1,688	+4
Income					
Under \$20K	13%	1,048	21%	1,221	+8
\$20K to \$50K	10%	1,664	16%	1,752	+6
\$50 to \$75K	5%	787	10%	868	+5
\$75K to \$100K*	6%	634	8%	688	+2
Over \$100K*	4%	1,010	6%	1,222	+2
Education					
High school grads or less	11%	2,121	18%	2,219	+7
Some college /associate degree	8%	1,627	14%	1,718	+6
College +	4%	2,225	6%	2,704	+2
Geography					
Rural	9%	1,180	15%	1,247	+6
Urban	9%	1,850	15%	2,167	+6
Suburban	7%	2,980	12%	3,273	+5
Note: * signifies that 2013-2015 differences are <b>not</b> statistically significant					