



Connect Ohio[®]
2009 Residential Technology
Assessment

June 2009

Presentation Outline

Summary of Key Findings	3
– Statewide Results	7
– Online Activities Among Ohio Internet Users	55
– Assessment by Age	61
– Assessment by Gender	81
– Assessment by Presence of Children in the Household	101
– Assessment by Educational Attainment	121
– Assessment by Urban-Rural Classification	141
– Assessment by Income	161
– Assessment by Race	181
Research Methodology	201

Summary of Key Findings

Key Findings: June 2009

Key Technology Benchmarks, June 2009:

Ohio residents with a computer:

79%, up from 76% in 2008.

Ohio residents who use the Internet (either from home or someplace else):

82%, up from 79% in 2008.

Ohio residents with home Internet service (either dial-up or broadband):

75%, up from 70% in 2008.

Ohio residents with home broadband service:

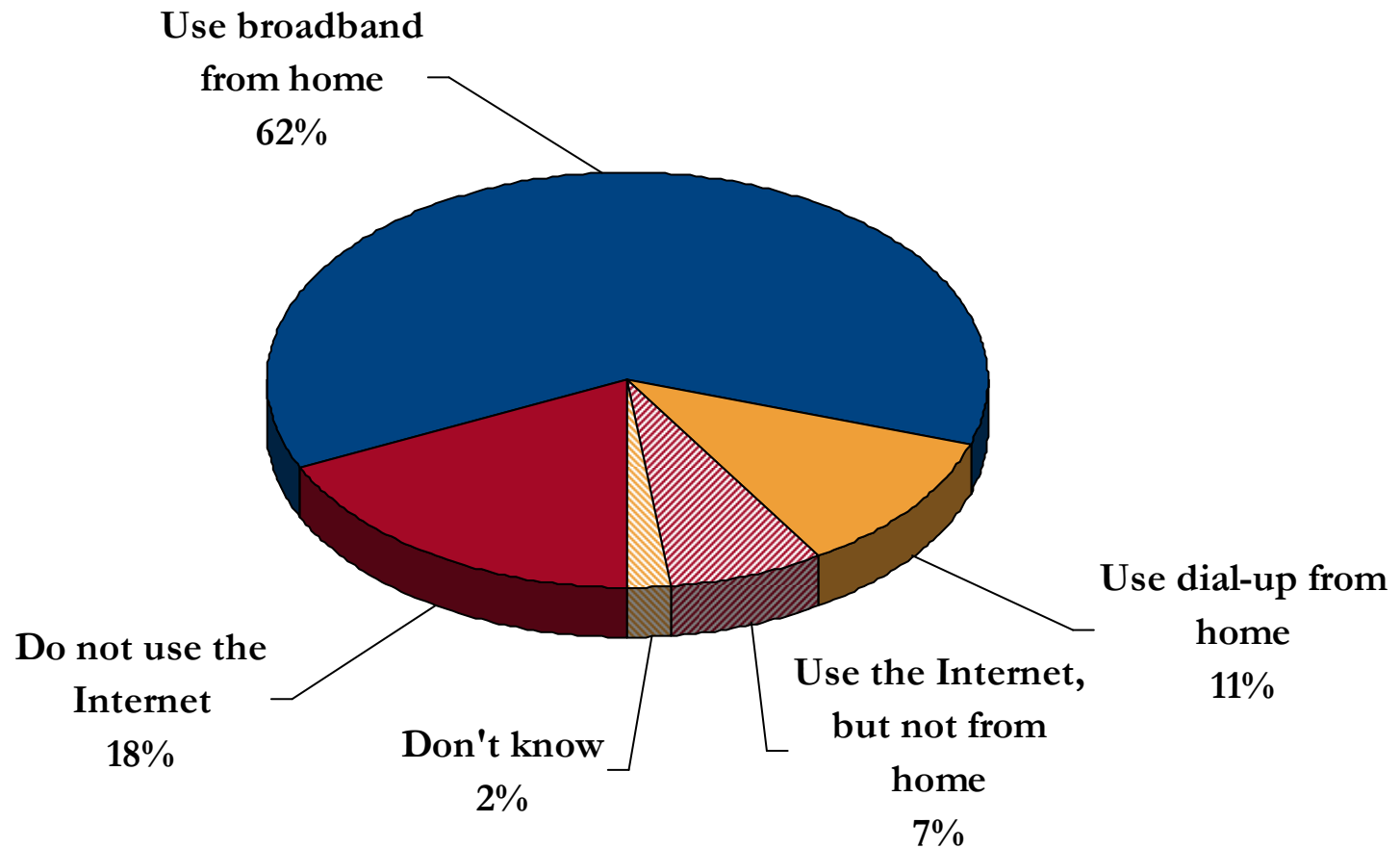
62%, up from 55% in 2008.

Key Findings: June 2009 *(Continued)*

- **Across Ohio, 95% of households have broadband service available to them. This equals approximately 4.2 million households that can subscribe to broadband.**
- **Computer ownership in Ohio grew to 79% since Connect Ohio's® inception, an increase of 4%.**
- **In Ohio, 75% of adults report that they subscribe to home Internet service, compared to the national average of 72% who go online from home.**
- **Statewide, 15% of employed Ohio adults use their Internet connection to work from home instead of commuting to an office, while an additional 30% say they do not currently telework, but would be willing to do so if their employers allowed it.**
- **The top barrier to broadband adoption continues to be the belief that residents do not need broadband.**

Ohio Technology Adoption Summary

Percent of Ohio residents who



Q: Do you have an Internet connection at home?
(n=1,200 OH residents)
2009 © Connect Ohio[®]

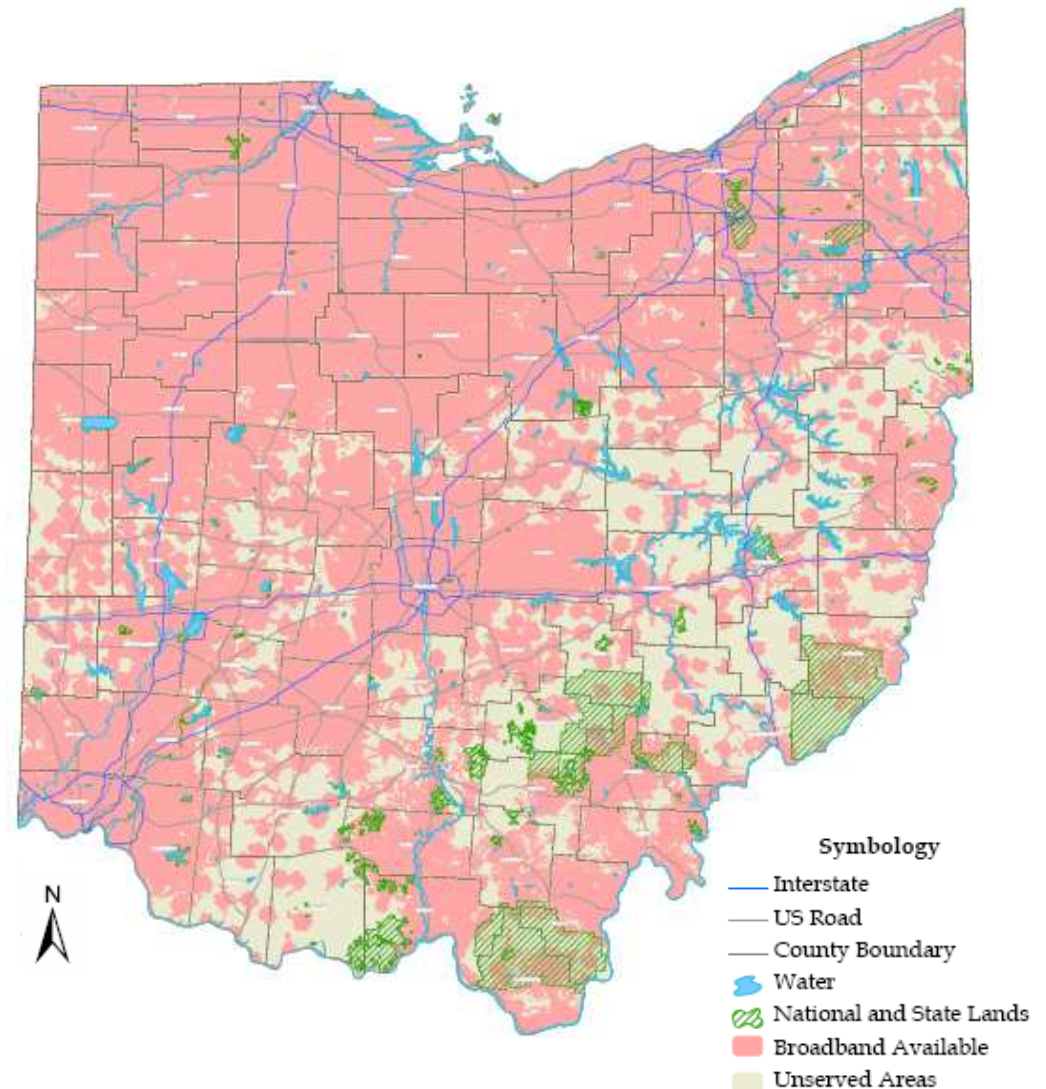
Statewide Results

Ohio Broadband Availability

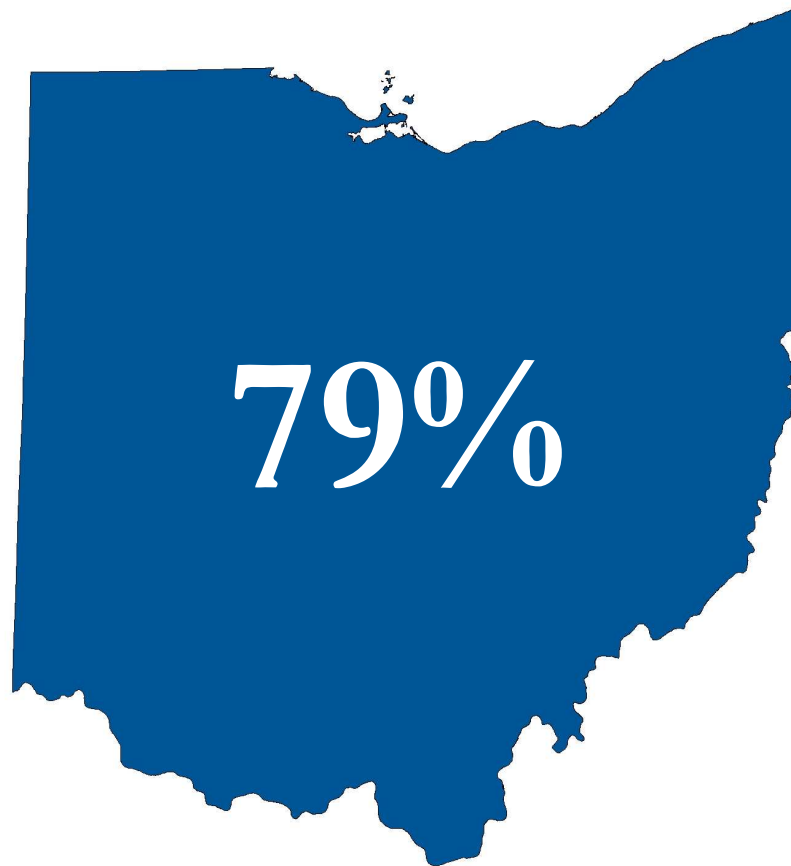
Across Ohio, 95% of households have broadband service available to them. This equals more than 4.2 million Ohio households that can subscribe to broadband.*

*Source: 2009 Q2 Connect Ohio® Statewide Broadband Inventory Map. The representations contained herein are for informational purposes only. Best efforts are undertaken to insure the correctness and accuracy of this information. However, all warranties regarding the accuracy of this map and any representation or inferences derived therefrom are hereby expressly disclaimed. Connect Ohio® and its partners neither assume nor accept any liability for the accuracy of these data. Those relying upon this information assume the risk of loss exclusively for any potential inaccuracy. All errors and omissions brought to the attention of Connect Ohio® will be promptly corrected. This map does not depict satellite broadband service.

2009 © Connect Ohio®



Ohio Residents With a Computer in Their Household

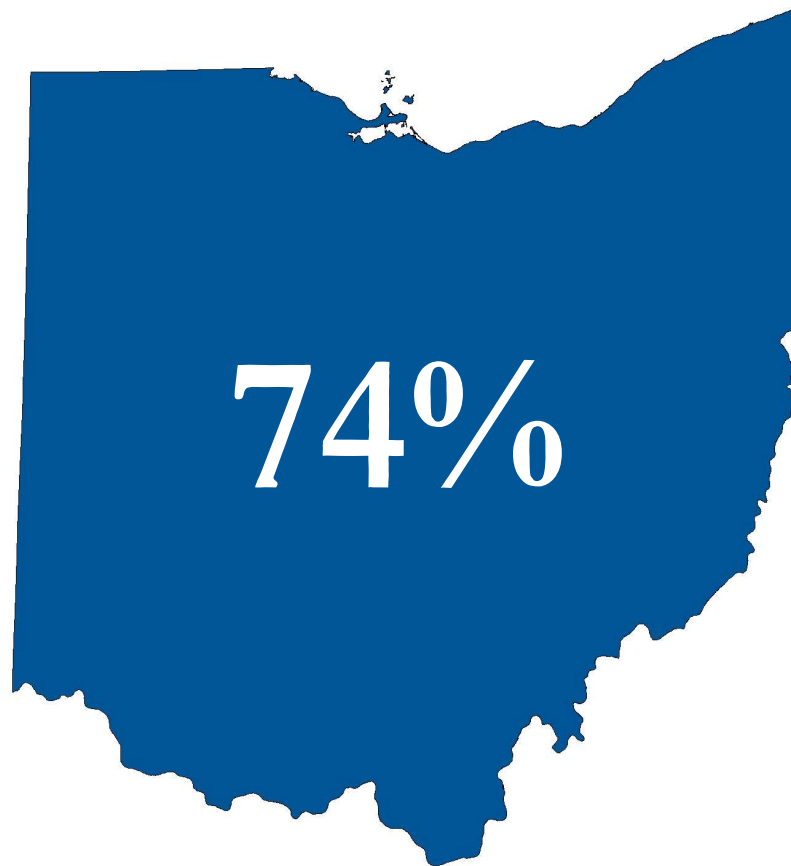


Q: Do you have a computer at home?
(n=1,200 OH residents)
2009 © Connect Ohio[®]

9
Do Not Copy Without Written Permission

Source: 2009 Connect Ohio[®] Statewide
Residential Technology Assessment
www.connectohio.org

Ohio Residents With a Cellular Phone



Q: Do you have a cellular phone?
(n=1,200 OH residents)
2009 © Connect Ohio[®]

10
Do Not Copy Without Written Permission

Source: 2009 Connect Ohio[®] Statewide
Residential Technology Assessment
www.connectohio.org

Ohio Residents With a Computer in Their Household

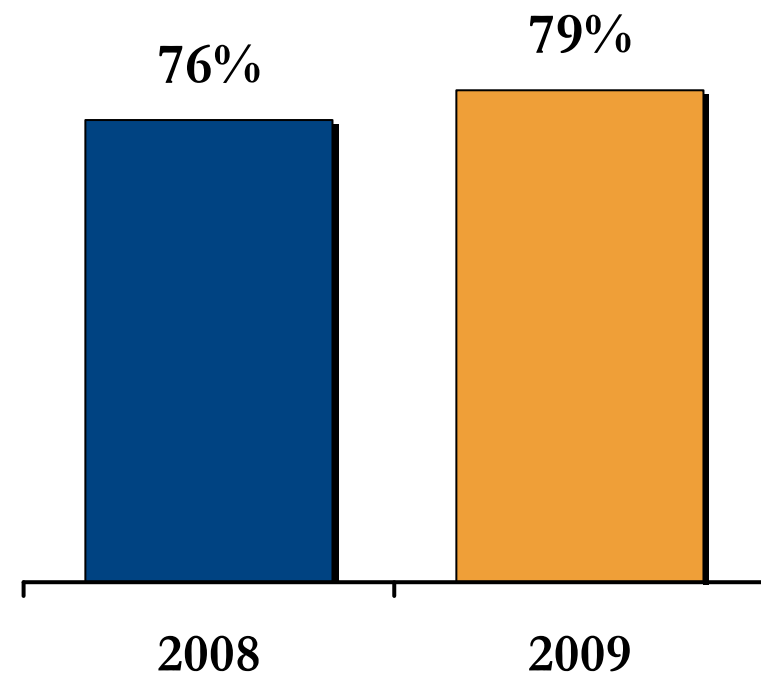
Computer ownership in Ohio grew to 79% since Connect Ohio's® inception, an increase of 4%.

By comparison, forecasts suggest that national computer use increased by only 1% during a similar time period.*

*National forecast calculated using double exponential smoothing to account for trends during this time period. Forecasts based on national computer use data reported by the Pew Internet and American Life Project's Usage Over Time from 2002-2008.
http://www.pewinternet.org/Data-Tools/Download-Data/~//media/Infographics/Trend%20Data/January%202009%20update/UsageOverTime_Mar_11_2009%20-%20Read%20Only.zip retrieved on June 15,2009.

Q: Do you have a computer at home?
(n=1,200 OH residents in 2008 and
n=1,200 OH residents in 2009)
2009 © Connect Ohio®

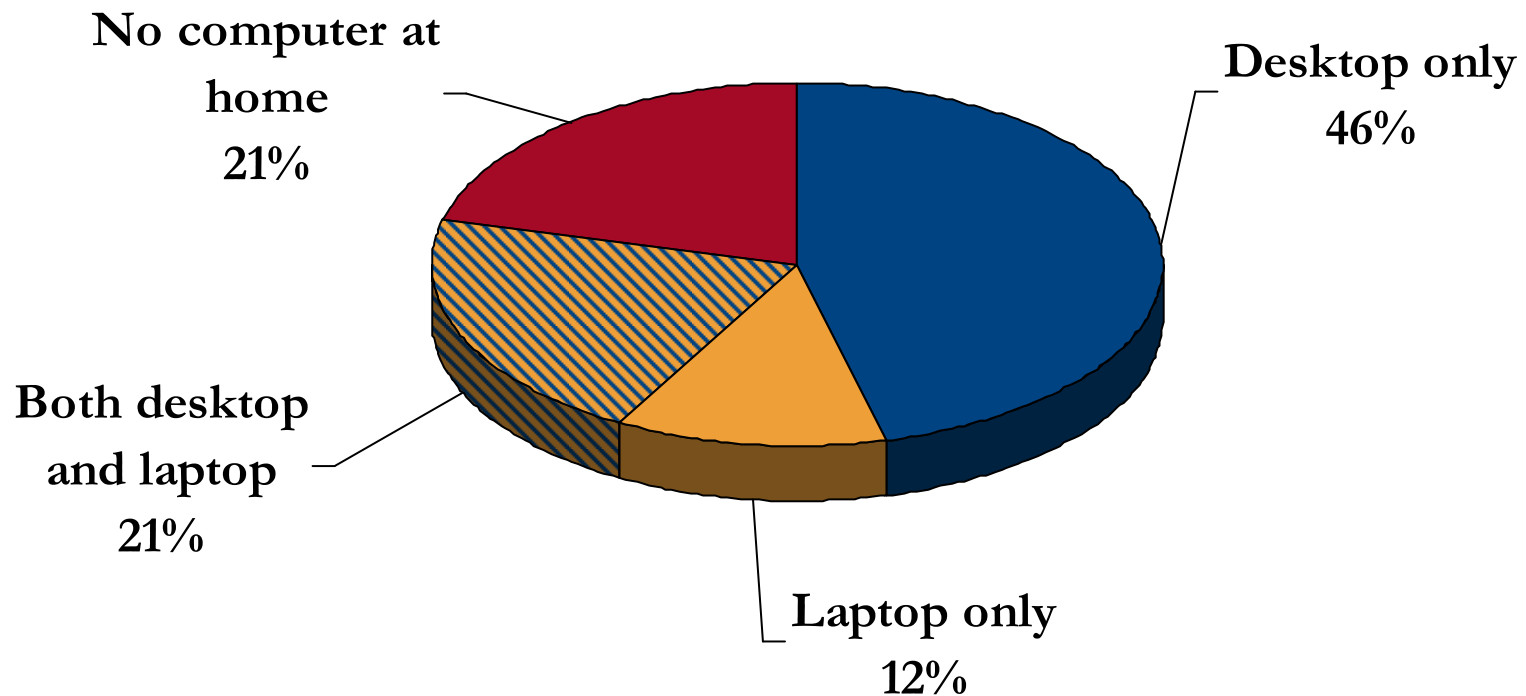
Percent of all Ohio residents who own a computer



Source: 2008 and 2009 Connect Ohio®
Statewide Residential Technology Assessments
www.connectohio.org

Types of Computers Ohio Residents Have at Home

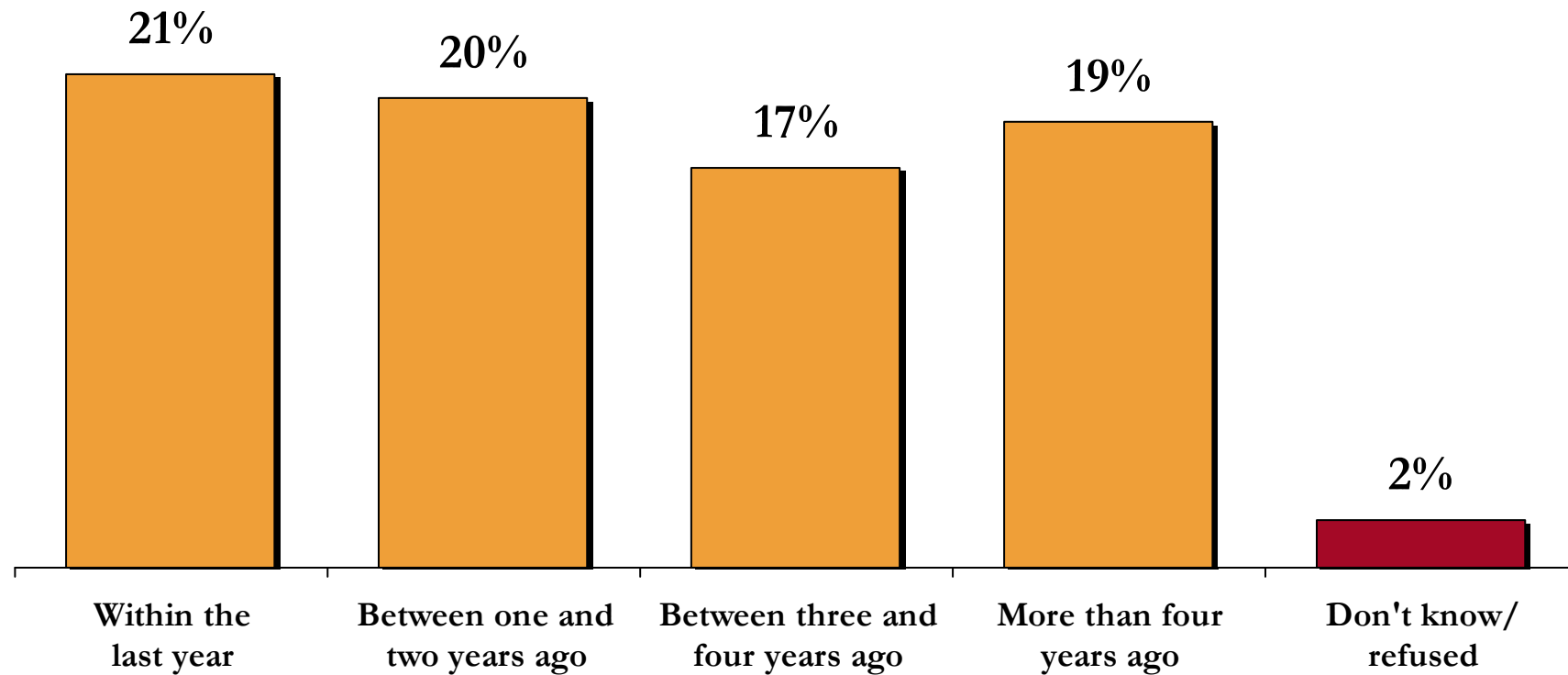
Computer ownership among Ohio residents



Q: What type of computer do you have at home?
(n=1,200 OH residents)
2009 © Connect Ohio[®]

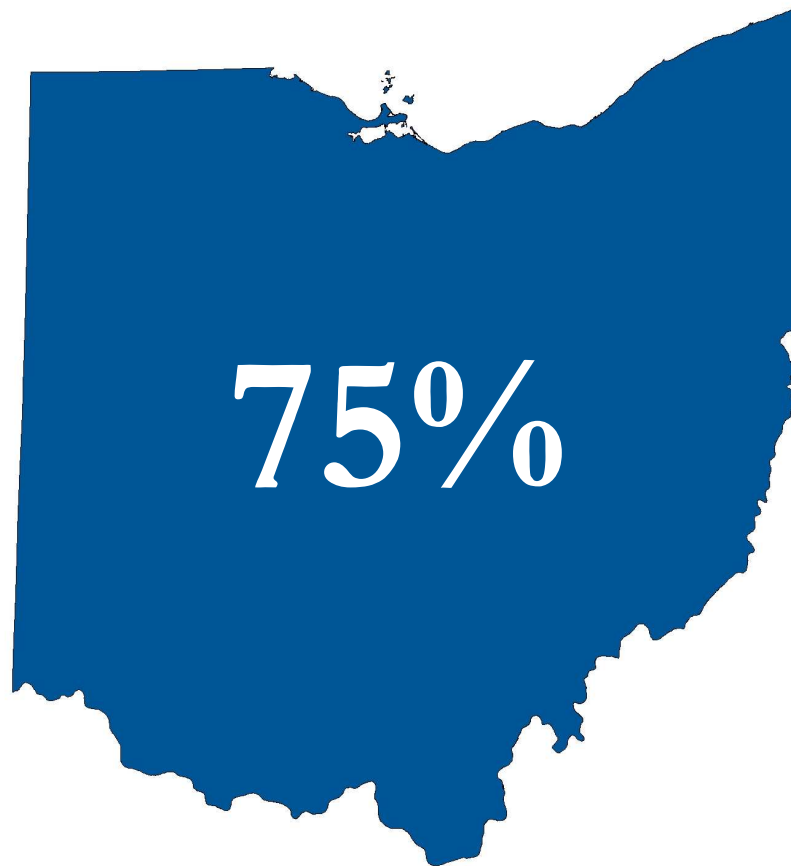
Home Computer Purchases

Percent of Ohio residents who have purchased a new home computer



Q: When was the last time you purchased a home computer?
(n=1,200 OH residents)
2009 © Connect Ohio®

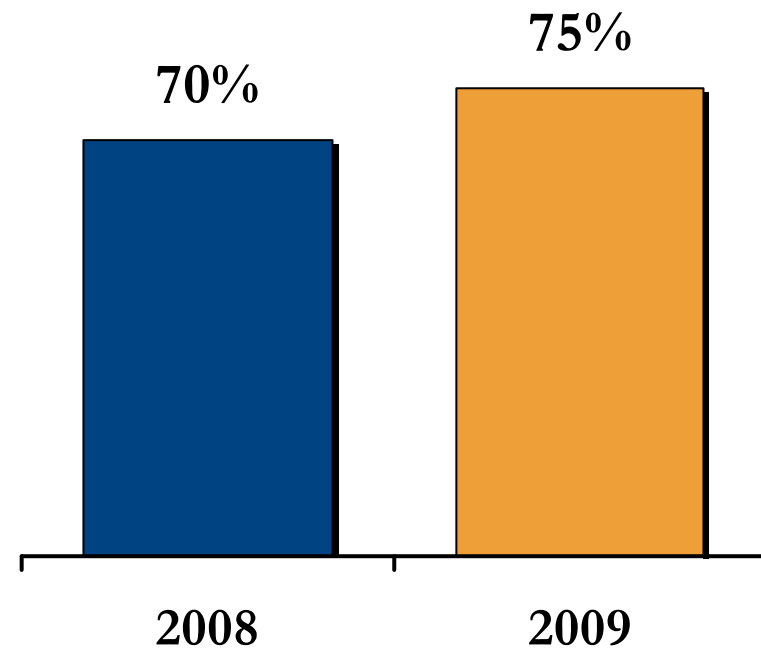
Ohio Residents With Home Internet Service (Broadband or Dial-Up)



Q: Do you have an Internet connection at home?
(n=1,200 OH residents)
2009 © Connect Ohio[®]

Ohio Residents With a Home Internet Connection (Either Dial-Up or Broadband)

Percent of all Ohio residents with either dial-up or broadband Internet service at home



Home Internet adoption across Ohio grew from 70% to 75% during the past year. This is a 7% growth over 2008.

In Ohio, 75% of adults report that they subscribe to home Internet service, compared to the national average of 72% who go online from home.*

*Source: Horrigan, John. "Home Broadband Adoption 2009." Pew Internet and the American Life Project, released and retrieved on June 17, 2009.

<http://www.pewinternet.org/Reports/2009/10-Home-Broadband-Adoption-2009.aspx?r=1>

Q: Do you have an Internet connection at home?

(n=1,200 OH residents in 2008 and n=1,200 OH residents in 2009)

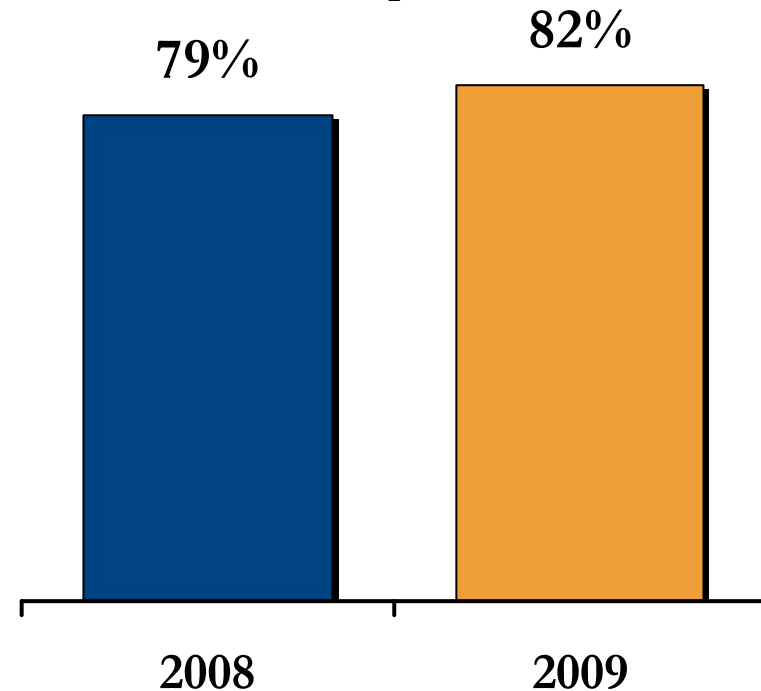
2009 © Connect Ohio®

Ohio Residents Who Use the Internet (Either Dial-Up or Broadband)

In Ohio, Internet use grew by 5%,
from 79% in 2008 to 82% in 2009.

Statewide, almost 350,000 more
Ohio adults now access the
Internet than in 2008.

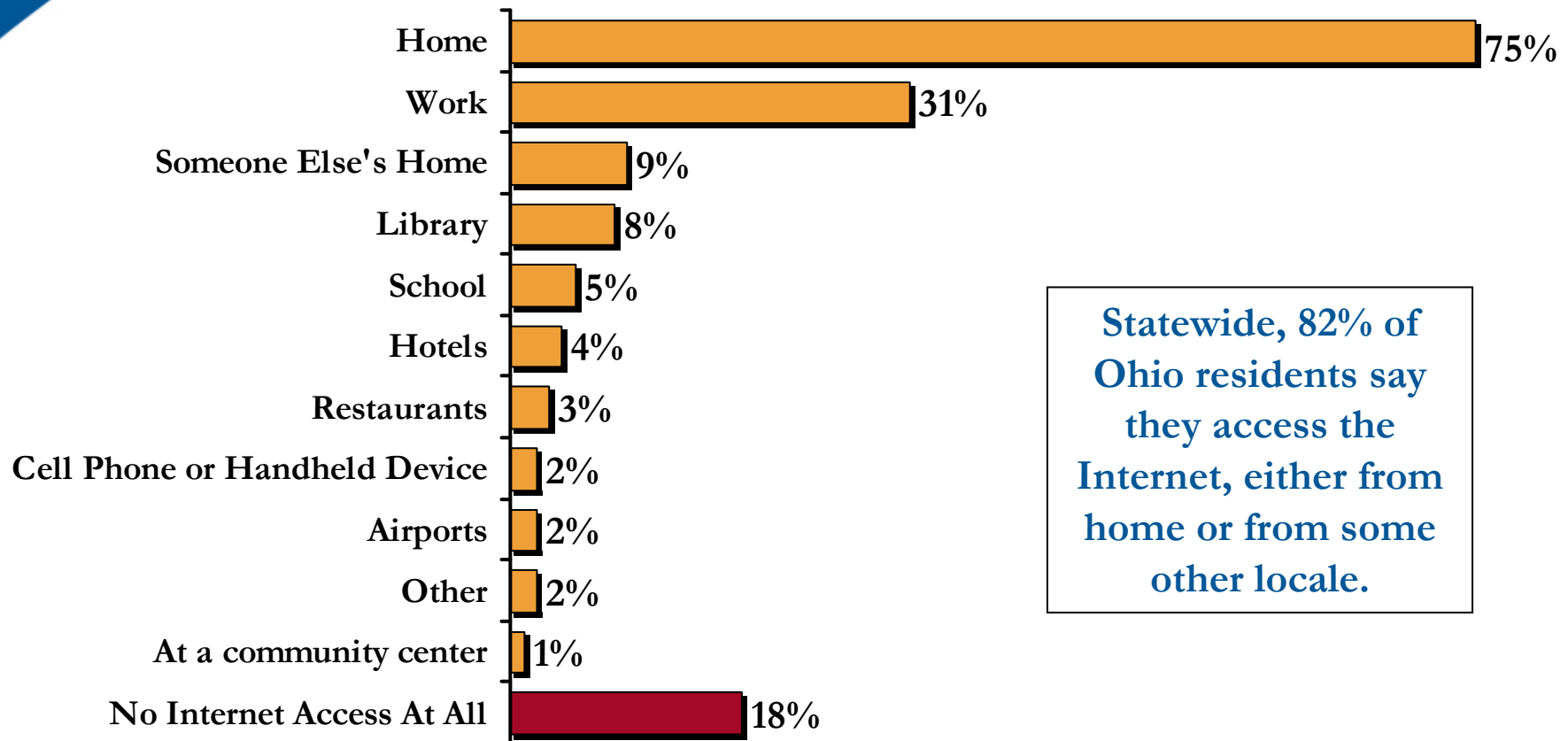
Percent of all Ohio residents who
access the Internet from home or some
other place



Q: At what locations do you have access to the Internet?
(n=1,200 OH residents in 2008 and
n=1,200 OH residents in 2009)
2009 © Connect Ohio®

Where Ohio Residents Access the Internet

Percent of all Ohio residents



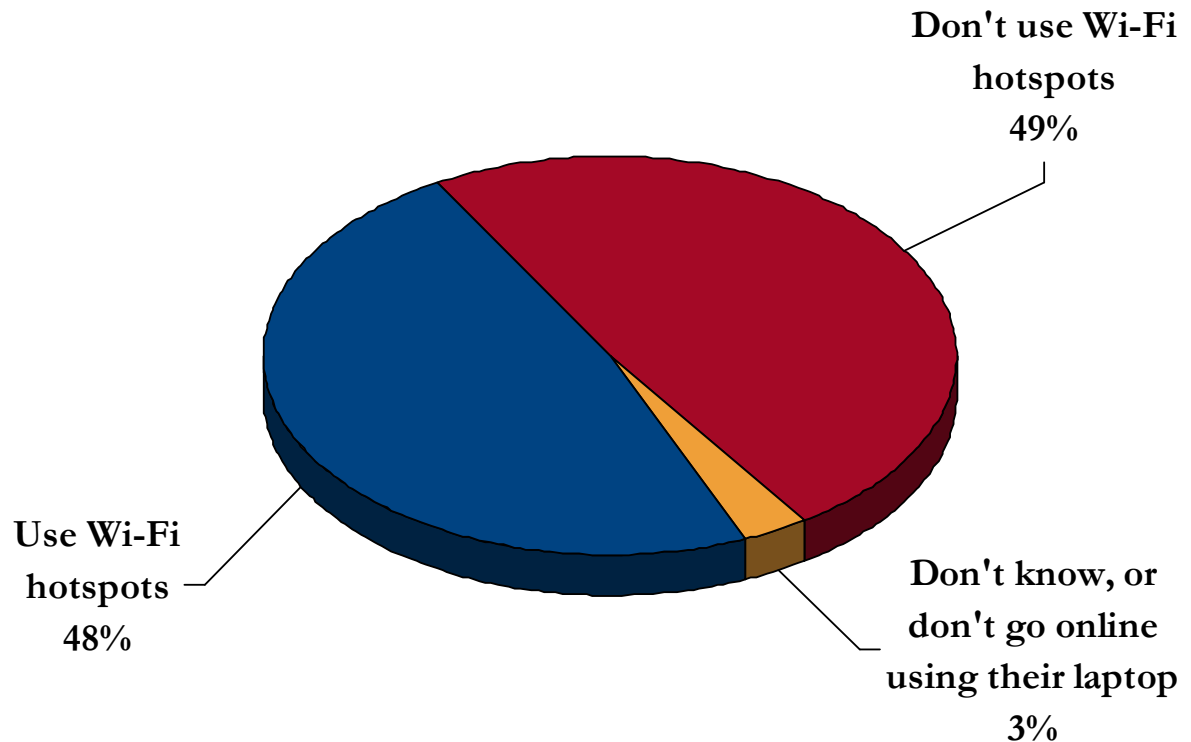
Statewide, 82% of Ohio residents say they access the Internet, either from home or from some other locale.

Q: At what locations do you have access to the Internet?
 (n=1,200 OH residents)
 2009 © Connect Ohio®

Internet Access via Wi-Fi Hotspots

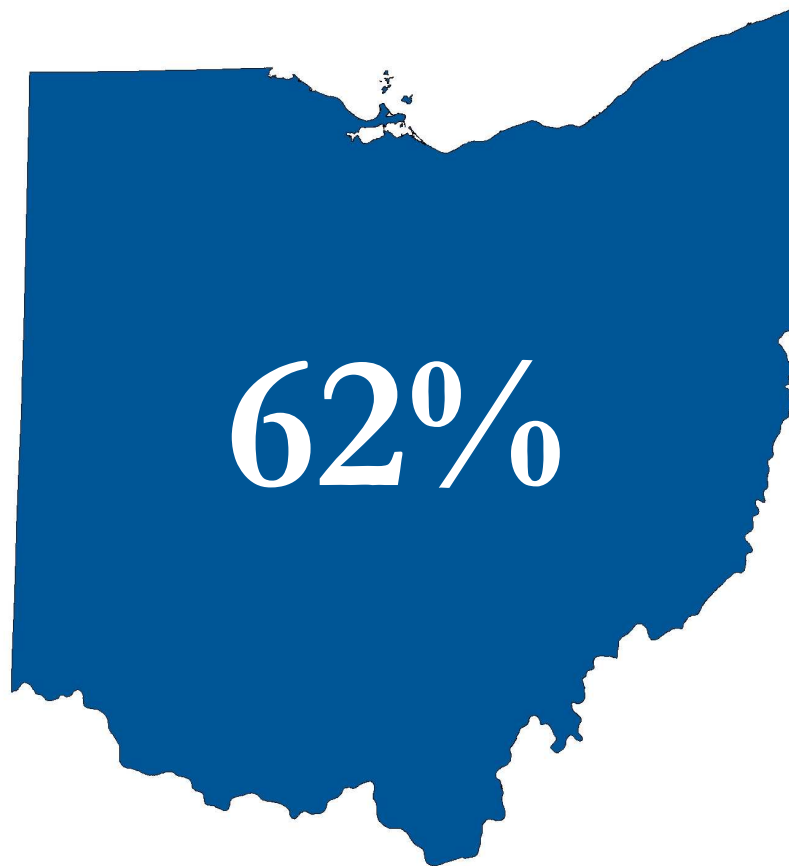
Percent of Ohio laptop computer owners

Nearly one-half of Ohio laptop computer owners access the Internet via online “hotspots.”



Q: Do you use Wi-Fi zones, sometimes called “hotspots,” to access the Internet with your laptop?
(n=378 OH laptop owners)
2009 © Connect Ohio[®]

Ohio Residents With Home Broadband Service



Q: Which of the following describe the type
of Internet service you have at home?
(n=1,200 OH residents)
2009 © Connect Ohio[®]

19
Do Not Copy Without Written Permission

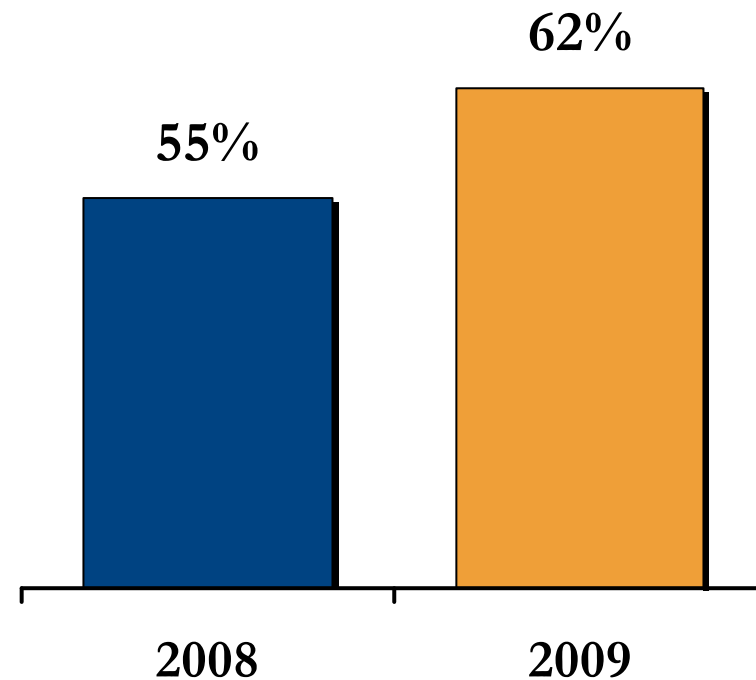
Source: 2009 Connect Ohio[®] Statewide
Residential Technology Assessment
www.connectohio.org

Ohio Residents Who Have Broadband Service at Home

In the past year, broadband adoption in Ohio grew from 55% to 62%. This is a 13% increase from 2008, comparable to the 15% growth in broadband adoption nationally.*

Ohio's growth in broadband adoption is especially significant in light of the state's higher-than-average unemployment rate, which has risen faster than the national average over the past year.**

Percent of all Ohio residents with broadband service at home



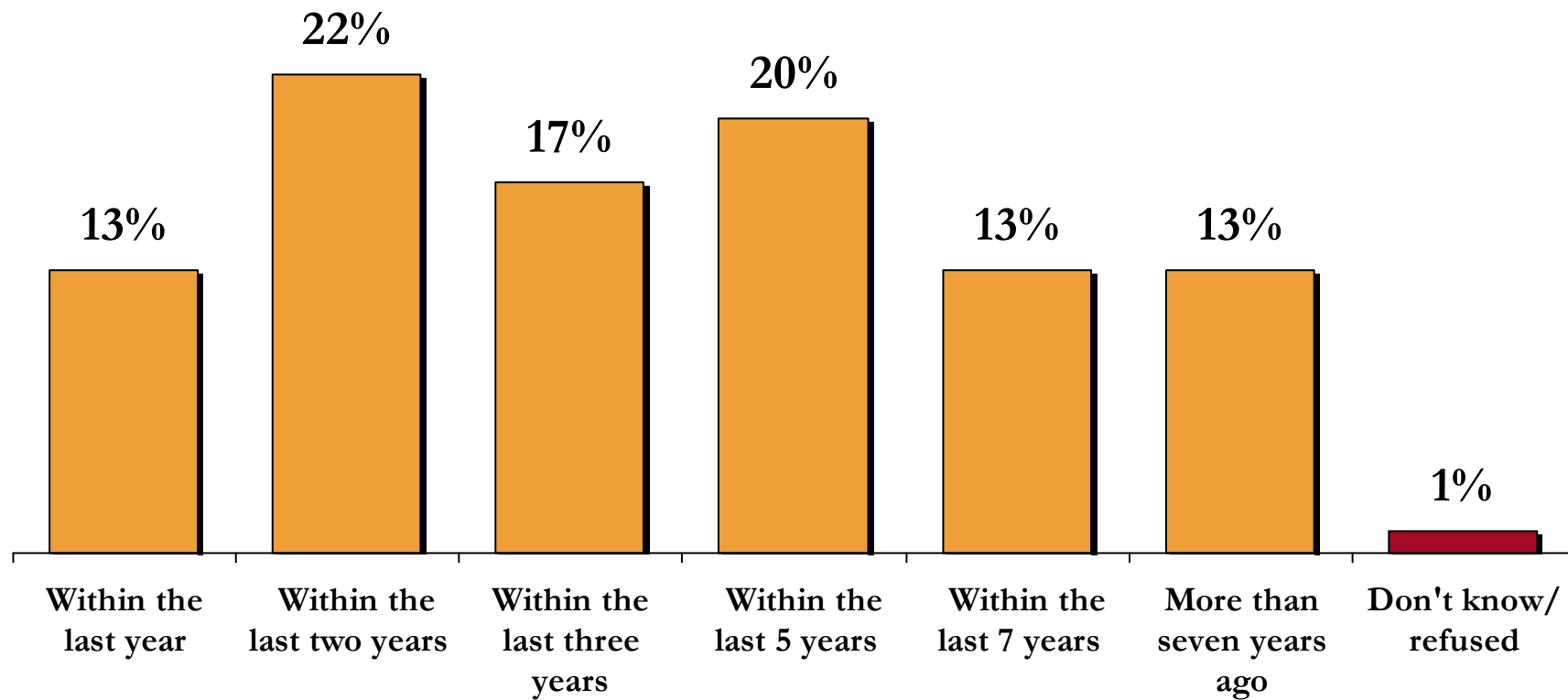
*Source: Horrigan, John. "Home Broadband 2009." Pew Internet and the American Life Project, released and retrieved on June 17, 2009.
<http://www.pewinternet.org/Reports/2009/10-Home-Broadband-Adoption-2009.aspx?r=1>

**U.S. Bureau of Labor Statistics, March 2008-March 2009 unemployment rates.

Q: Which of the following describe the type of Internet service you have at home? (n=1,200 OH residents in 2008 and n=1,200 OH residents in 2009)

When Ohio Residents Subscribed to Broadband

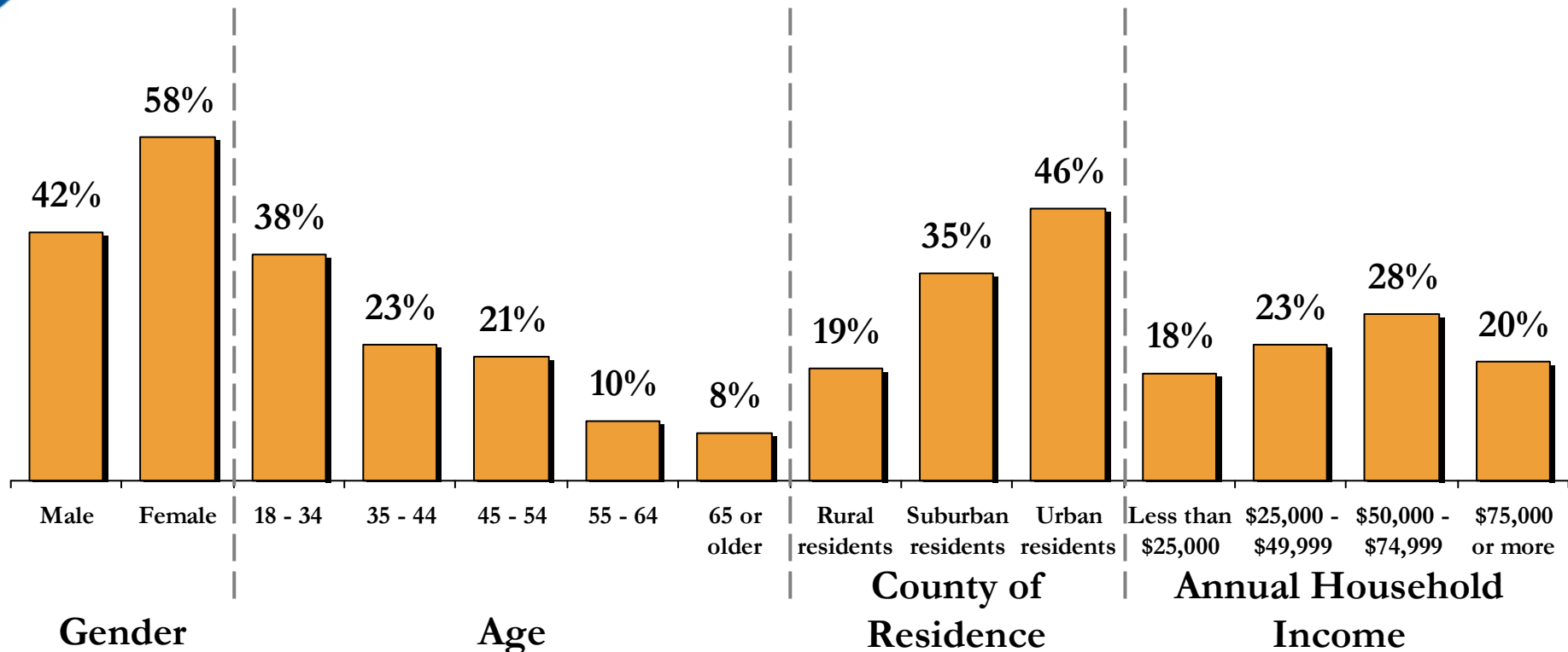
Percent of Ohio residents with a broadband connection at home



Q: When did you first begin subscribing to broadband service?
(n=733 OH residents with broadband service at home)
2009 © Connect Ohio®

Profile of New Broadband Subscribers

Among Ohio residents who subscribed to broadband in the last twelve months

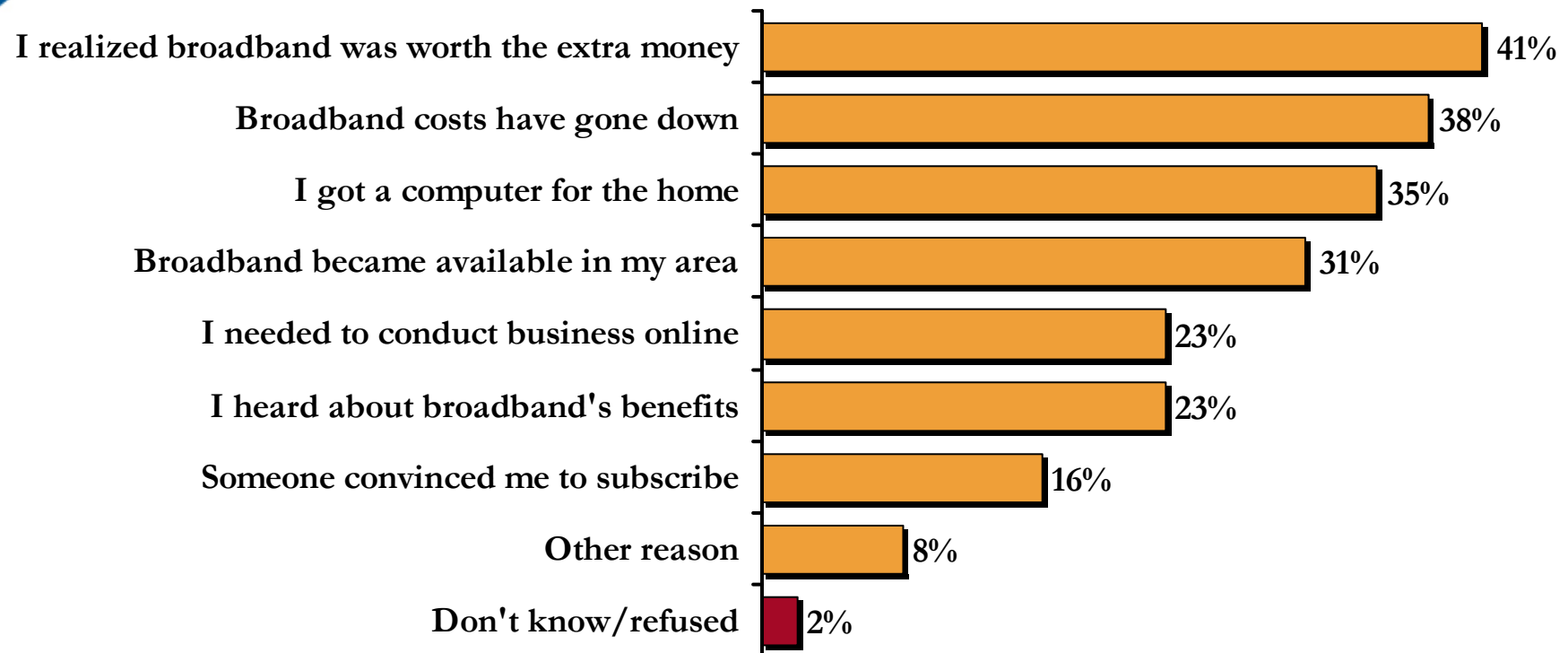


Q: When did you first begin subscribing to broadband service?
 (n=95 OH residents who first subscribed to broadband service within the past year)

2009 © Connect Ohio®

Why Ohio Residents Subscribe to Broadband

Percent of Ohio residents with a broadband connection at home*



*Percentages do not add up to 100% because respondents could give multiple responses.

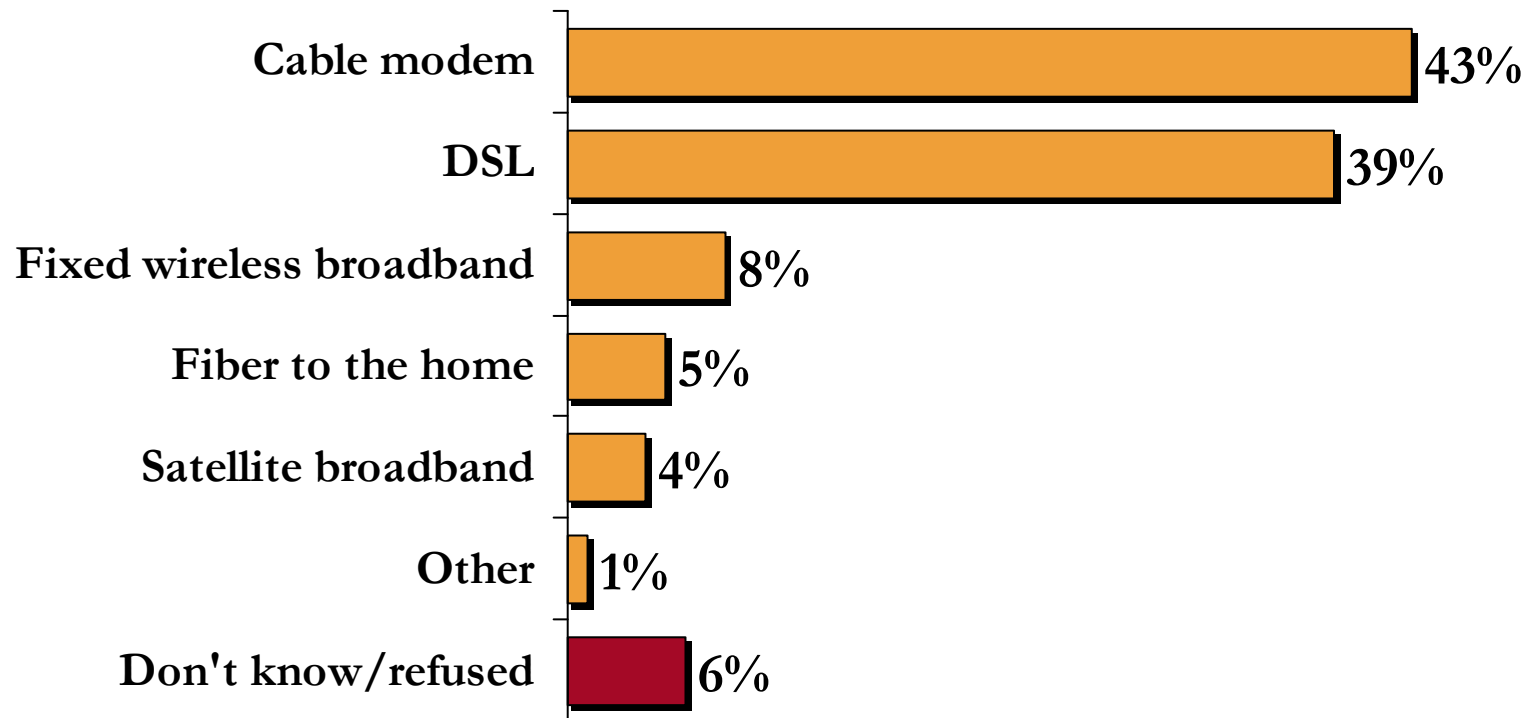
Q: Which of the following contributed to your decision to subscribe to broadband service?

(n=733 OH residents with broadband service at home)

2009 © Connect Ohio®

Types of Broadband Service That Ohio Residents Use

Percent of Ohio residents with a broadband connection at home*



*Percentages do not add up to 100% because respondents could give multiple responses.

Q: Which of the following describes the broadband service you have at home?

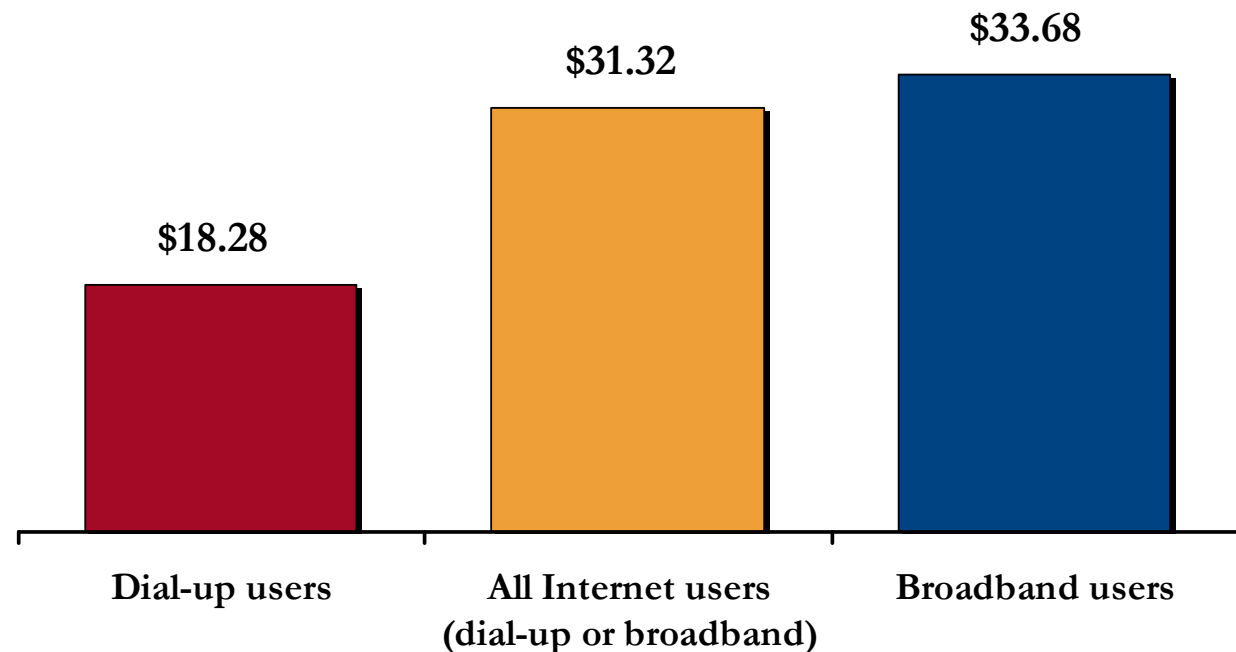
(n=733 OH residents with broadband service at home)

2009 © Connect Ohio®

Average Monthly Price Paid for Internet Service by Ohio Residents

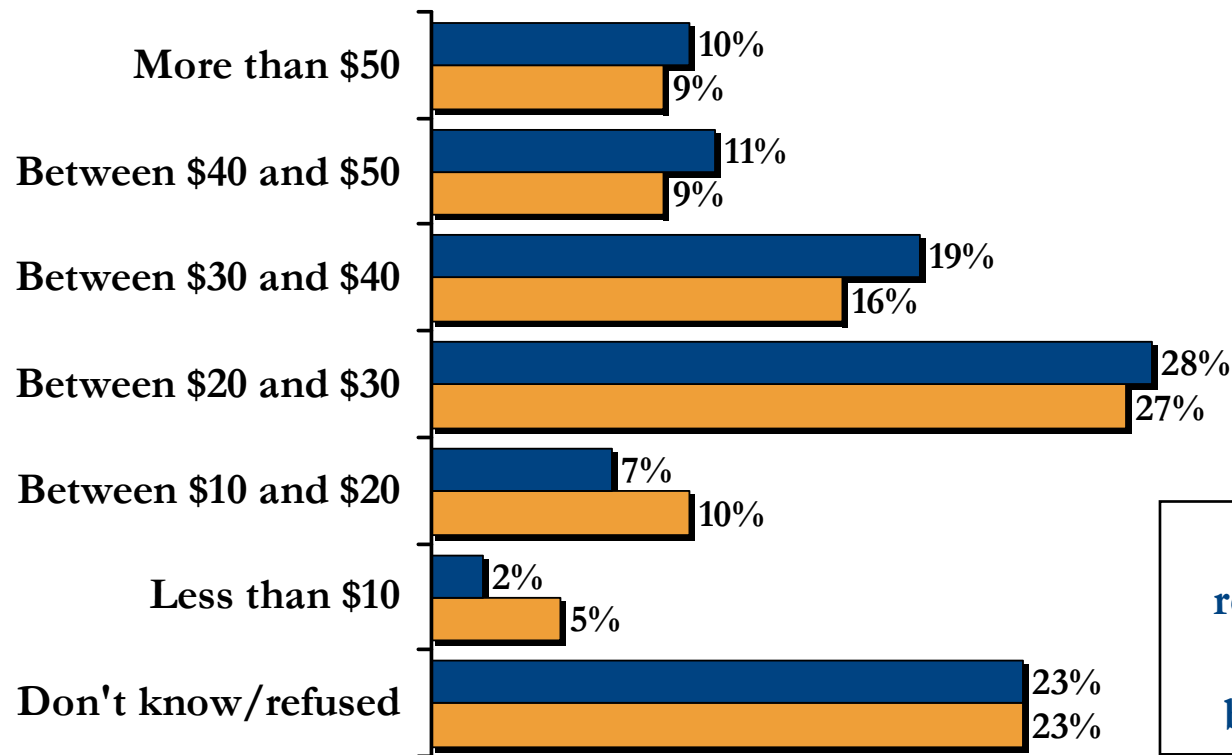
Average price paid for home Internet service among

Ohio residents are paying an average of \$1.45 less for home broadband service than they did in 2008.



Average Monthly Price Paid for Internet Service by Ohio Residents

Percent of Ohio Residents With Home Internet Service



On average, Ohio residents pay \$33.68 monthly for home broadband service.

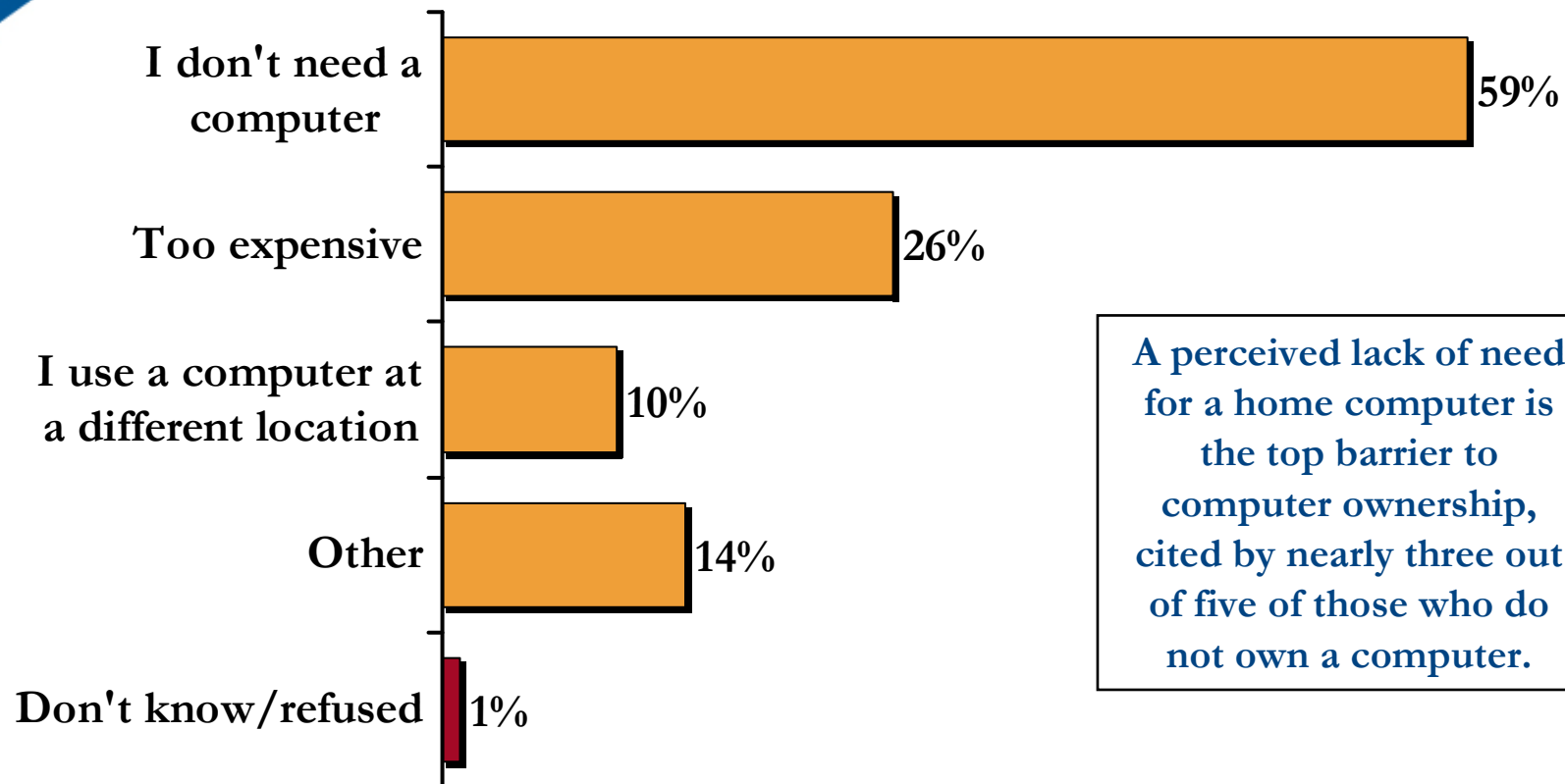
■ All Internet subscribers (dial-up and broadband)

■ Broadband subscribers

Q: What do you pay each month for your Internet service?
 (n=896 OH residents with Internet service at home)
 2009 © Connect Ohio®

Barriers to Computer Ownership

Percent of Ohio residents who do not own a computer*



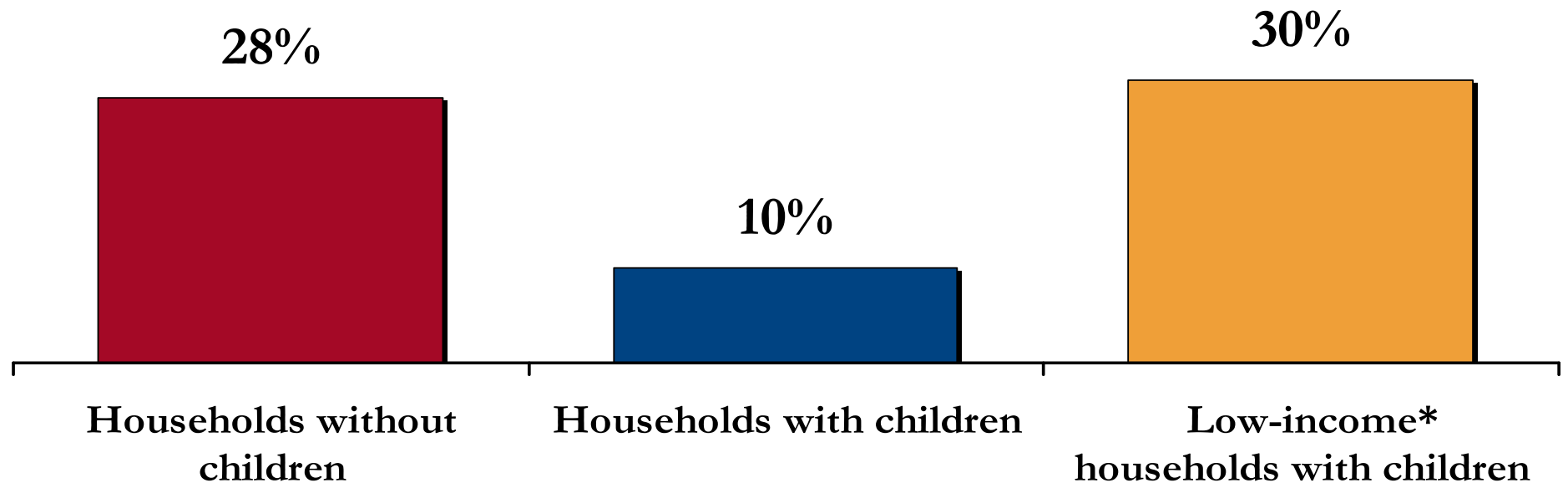
A perceived lack of need for a home computer is the top barrier to computer ownership, cited by nearly three out of five of those who do not own a computer.

*Percentages do not add up to 100% because respondents could give multiple responses.

Q: Why don't you have a computer at home?
(n=258 OH residents with no computer in their household)

Ohio Households Without a Computer at Home

Percent of Ohio households who DO NOT own a computer

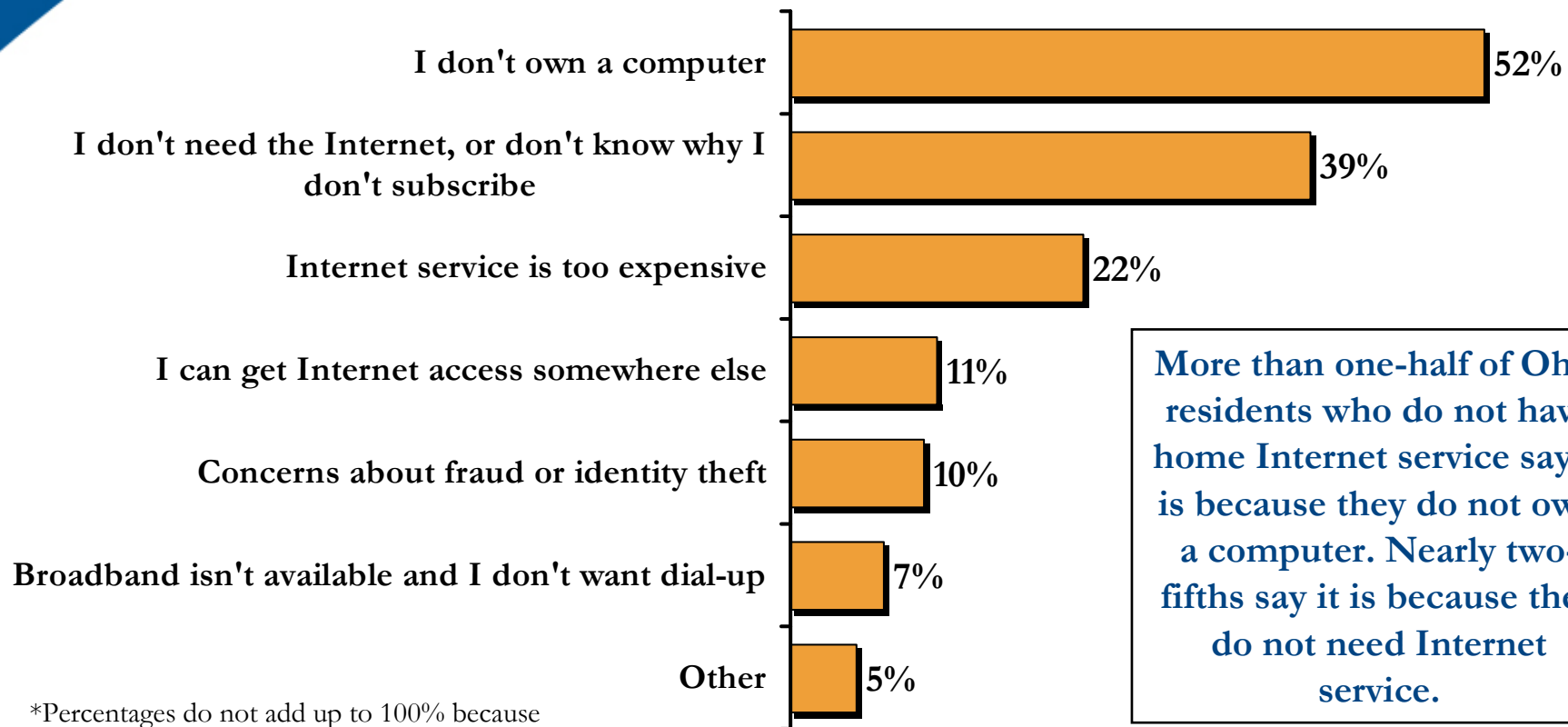


*Low-Income=annual household income less than \$25,000

Q: Does your household have a computer?
(n=1,200 OH residents)
2009 © Connect Ohio[®]

Barriers to Internet Adoption

Among Ohio residents with no Internet (dial-up or broadband) connection at home*



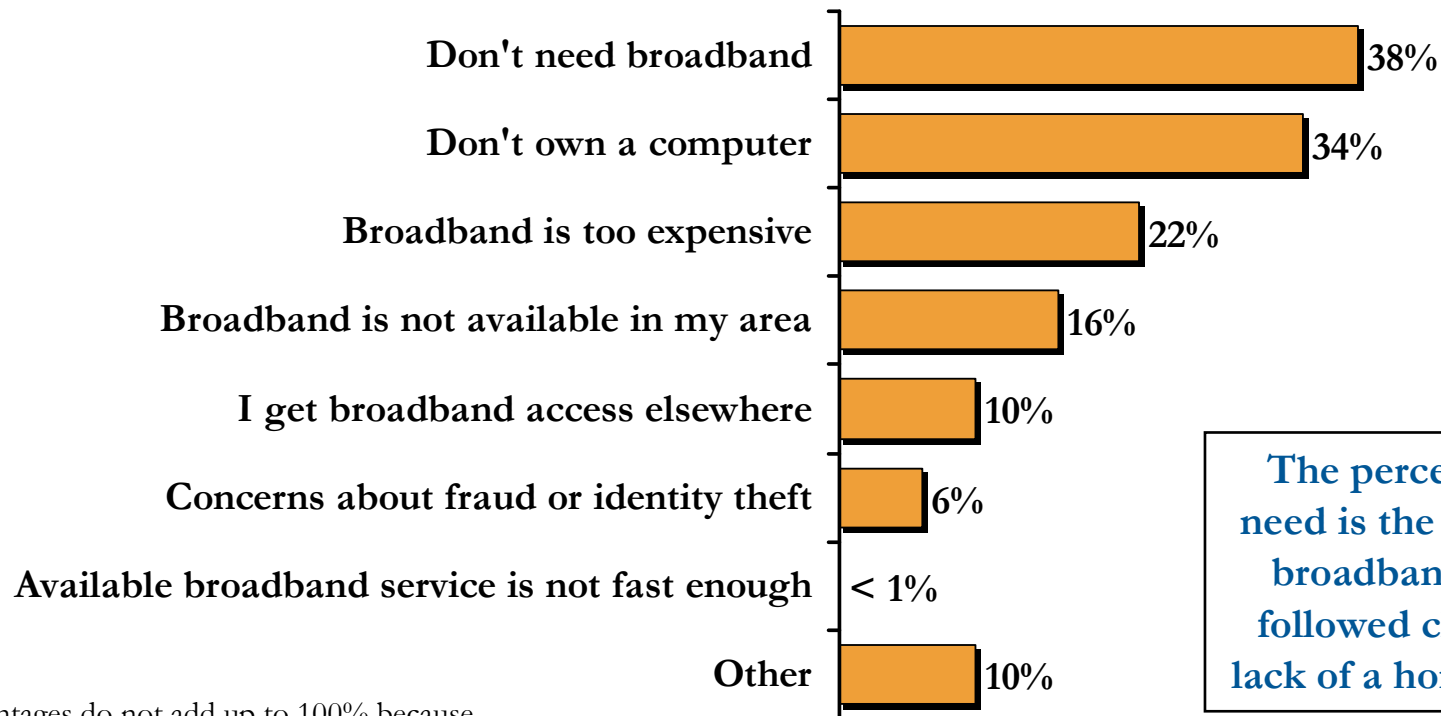
More than one-half of Ohio residents who do not have home Internet service say it is because they do not own a computer. Nearly two-fifths say it is because they do not need Internet service.

*Percentages do not add up to 100% because respondents could give multiple responses.

Q: Why don't you subscribe to the Internet at home?
(n=300 OH residents with no Internet service in their household)

Barriers to Broadband Adoption

Among Ohio residents who do not subscribe to home broadband service*



The perceived lack of need is the top barrier to broadband adoption, followed closely by the lack of a home computer.

*Percentages do not add up to 100% because respondents could give multiple responses.

Q: Why don't you subscribe to broadband Internet service?

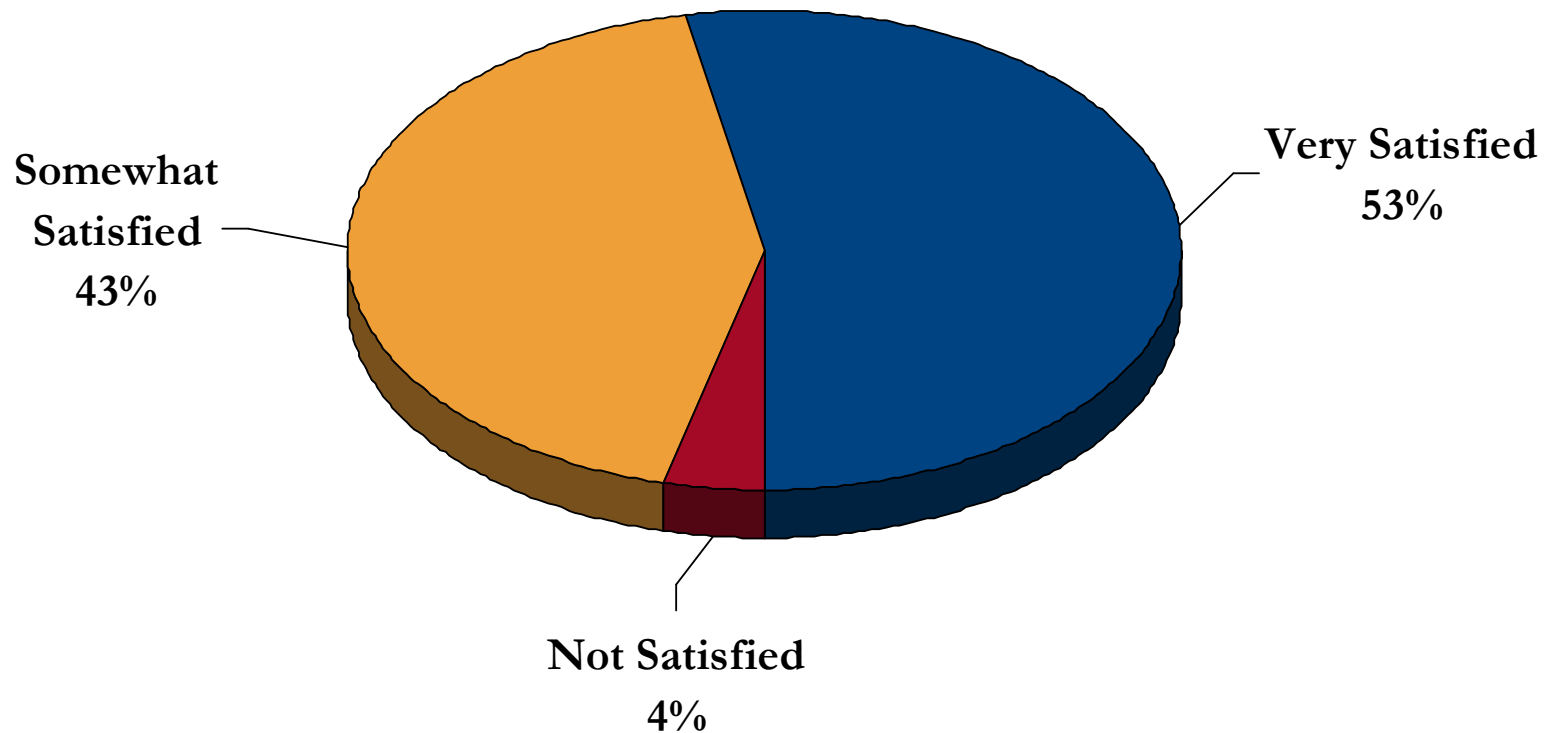
Or if broadband is not available:

Q: Why wouldn't you subscribe to broadband Internet service?

(n=467 OH residents with no home broadband service)

Satisfaction With Present Broadband Speed

Satisfaction among Ohio residents with their home broadband speed



Q: How satisfied are you with the speed of your broadband connection?

(n=733 OH residents with broadband service at home)

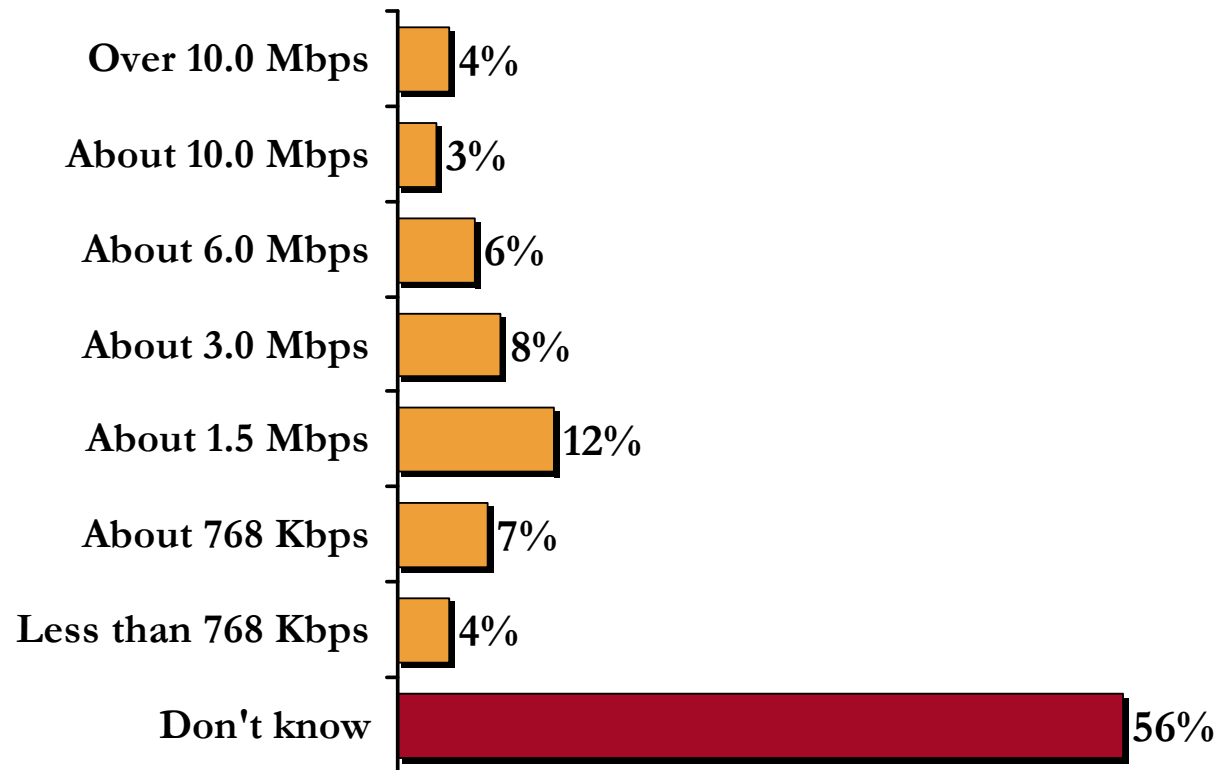
2009 © Connect Ohio®

Broadband Download Speed

Among Ohio residents with home broadband service

Statewide, only 44% of broadband subscribers knew what their download speeds were.

The average download speed among broadband subscribers who know their approximate speed is 4.1 Mbps.

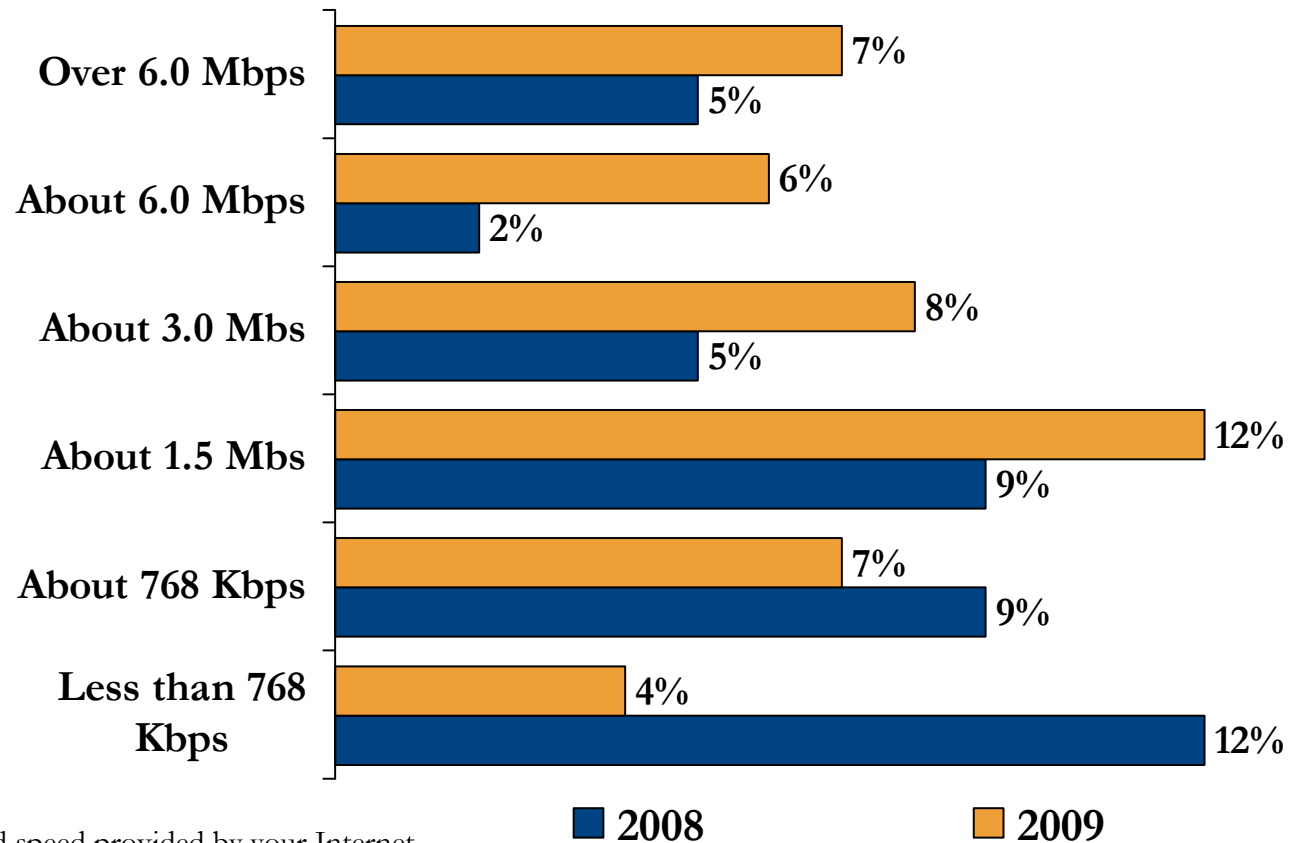


Q: What is the approximate download speed provided by your Internet service provider?
 (n=733 OH residents with broadband service at home)
 2009 © Connect Ohio®

Trends in Broadband Download Speed

Among Ohio residents with home broadband service

The percent of broadband subscribers whose download speeds are 1.5 Mbps or faster has increased over the past year.



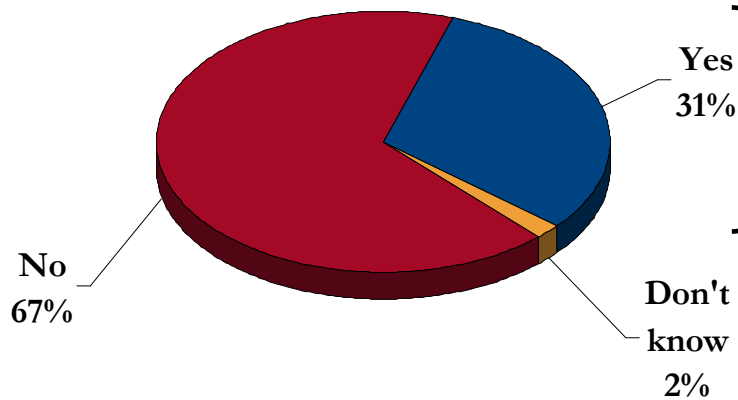
Q: What is the approximate download speed provided by your Internet service provider?

(n=733 OH residents with home broadband service in 2009, and n=658 OH residents with home broadband service in 2008)

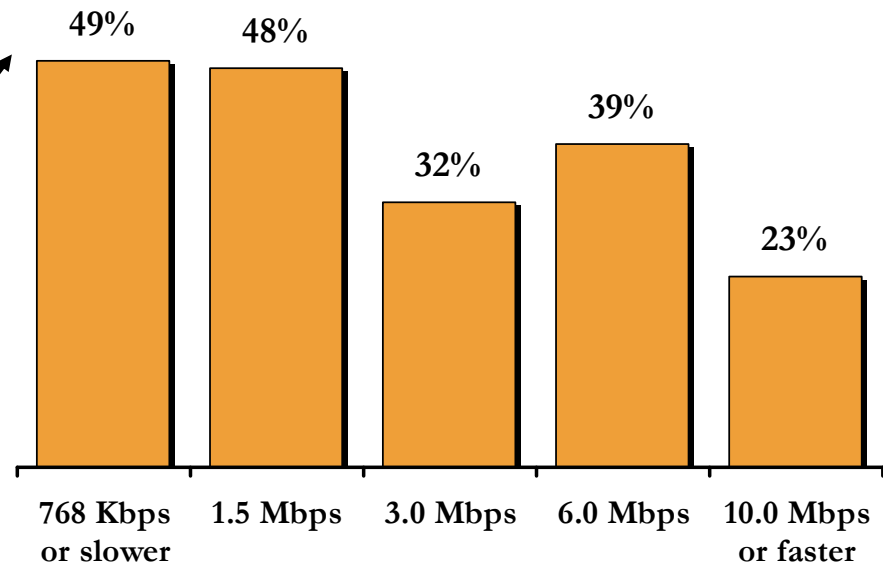
2009 © Connect Ohio®

Perceptions of Broadband Speed Availability

Ohio broadband subscribers aware of faster available service where they live



Awareness of faster service by current download speed

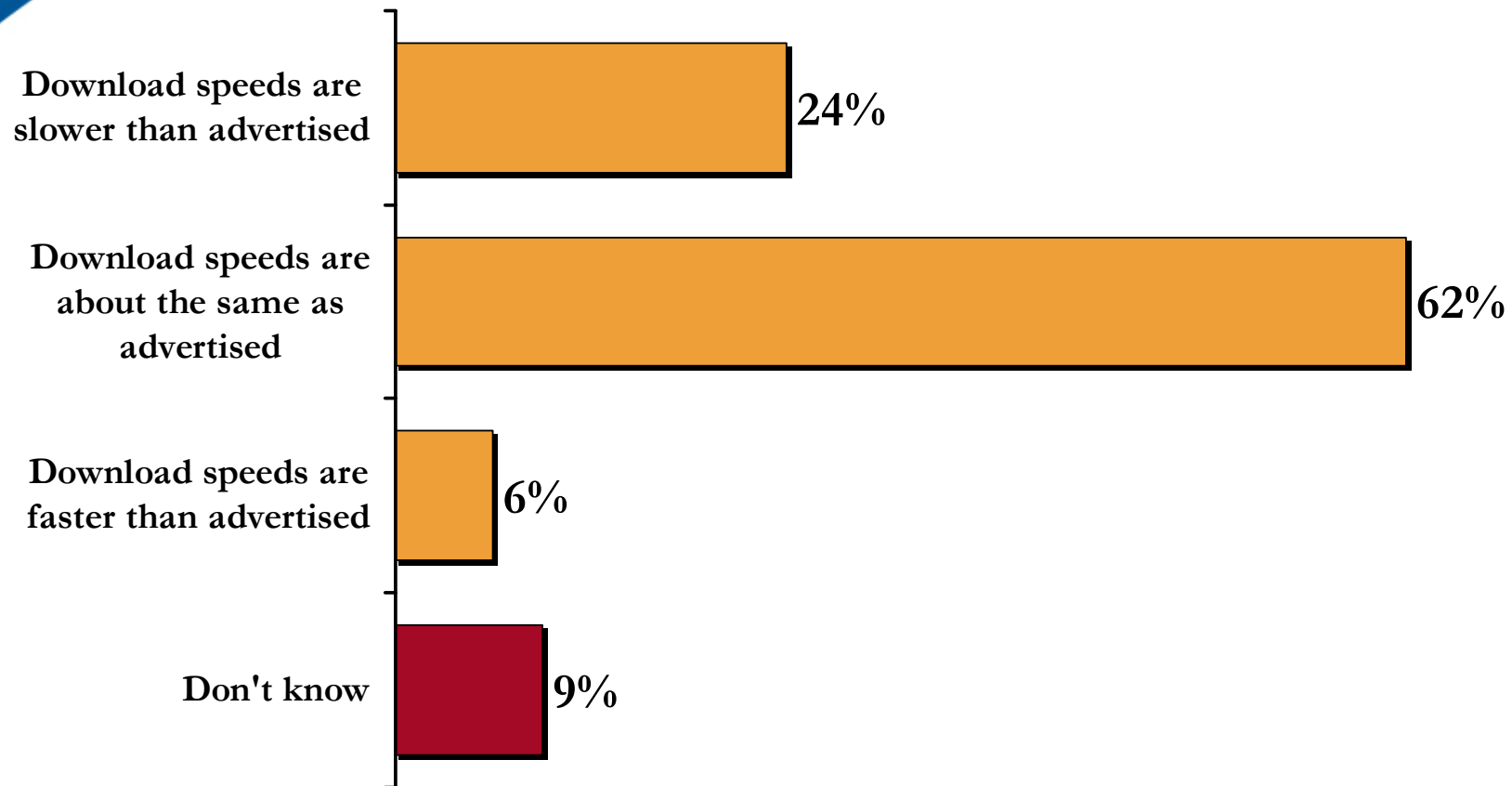


Subscriber's approximate download speed

Q: Are you aware of any services available in your area that offer faster speeds than the service you have now?
 (n=733 OH residents with broadband service at home)
 2009 © Connect Ohio®

Actual Broadband Speeds vs. Advertised Speeds

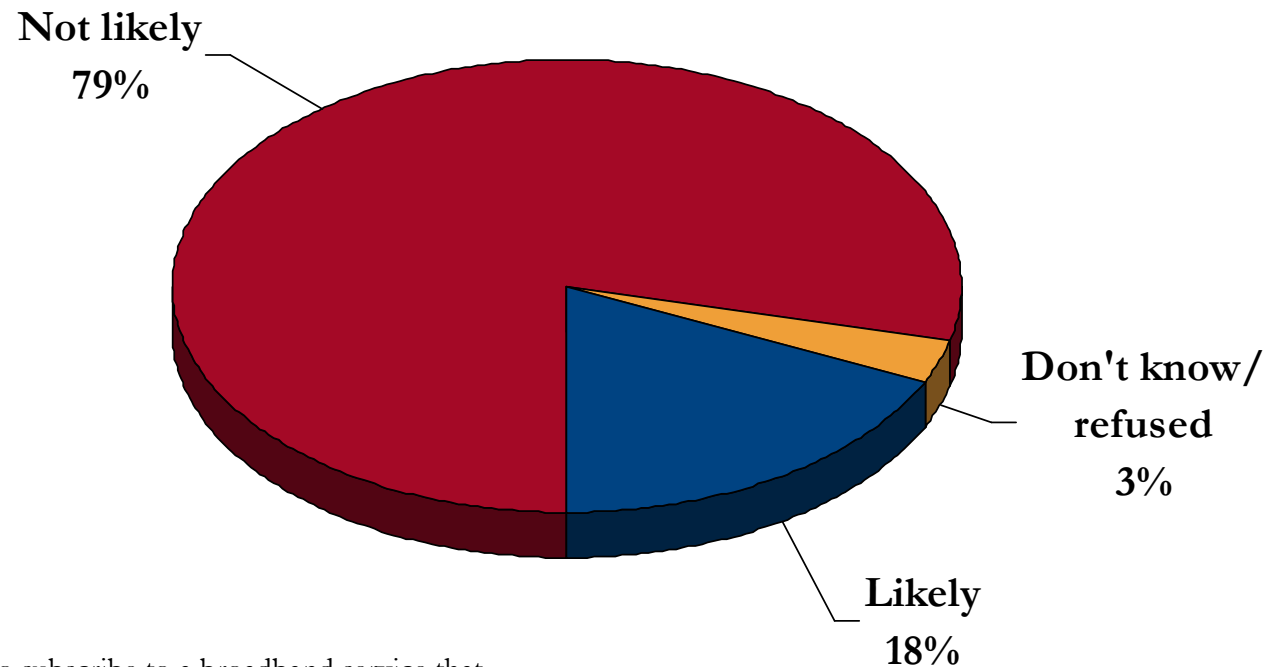
Among Ohio residents with home broadband service



Q: To what extent would you say the actual speeds you receive compare to the speeds advertised by the Internet provider you use? (n=733 OH residents with broadband service at home)
2009 © Connect Ohio®

Would You Likely Pay an Extra \$10 Per Month to Double Your Broadband Speed?

Percent of Ohio broadband subscribers

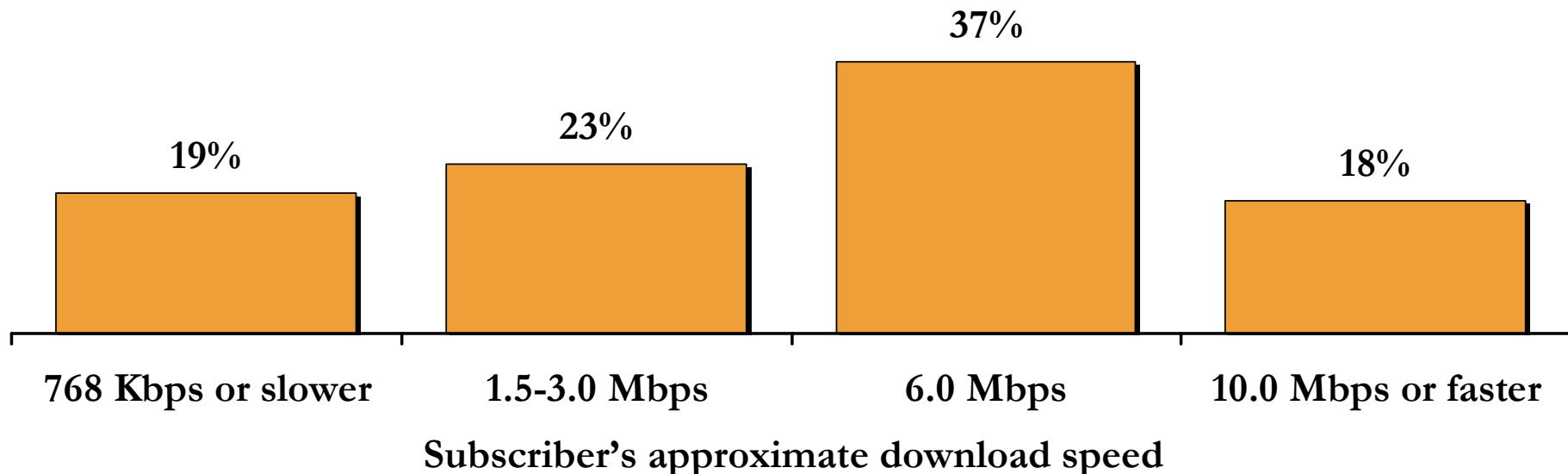


Q: Would you be likely to subscribe to a broadband service that was twice as fast as your current connection speed for an additional ten dollars per month above what you are paying now? (n=733 OH residents with broadband service at home)

Likely to Pay an Extra \$10 Per Month to Double Broadband Speeds

By Subscriber's Download Speed

Percent of Ohio broadband subscribers who would be likely to upgrade their speed for \$10 more a month



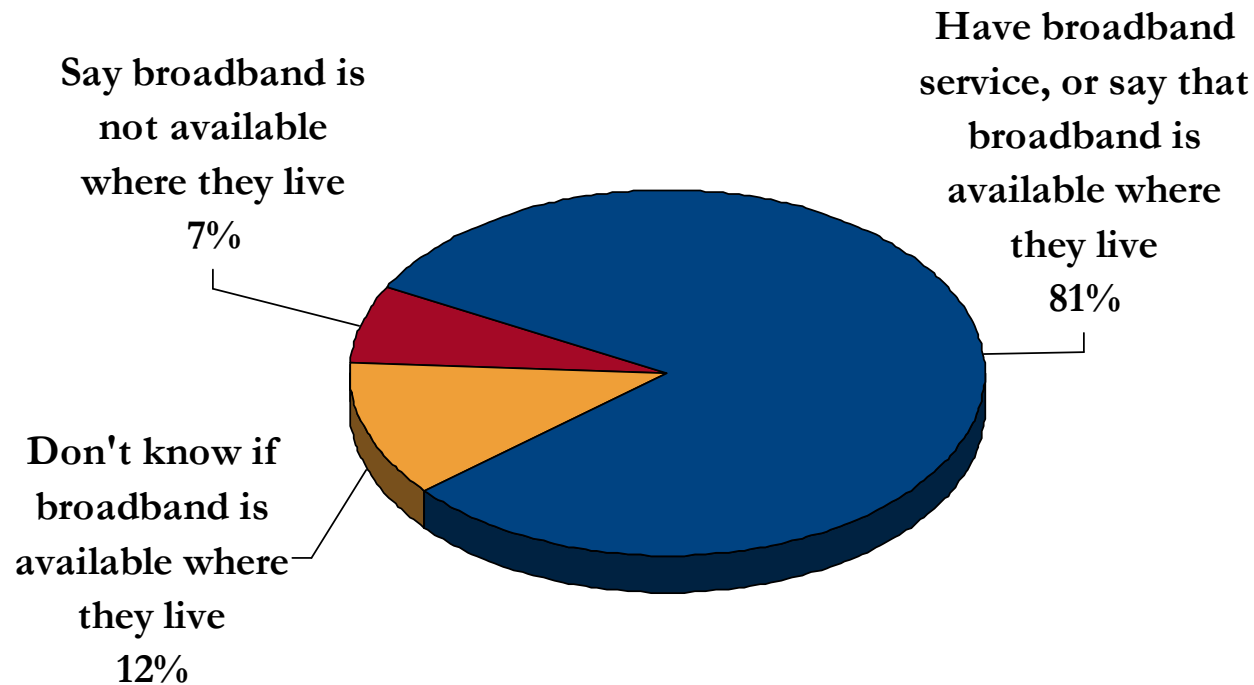
Q: Would you be likely to subscribe to a broadband service that was twice as fast as your current connection speed for an additional ten dollars per month above what you are paying now?

(n=306 OH residents who know their broadband download speed)

2009 © Connect Ohio[®]

Perceptions of Broadband Availability in Ohio

Awareness of broadband availability among all Ohio residents



While approximately 95* of Ohio residents have broadband available to them, only 81% are aware that broadband is available.

*March 2009 Connect Ohio[®] Statewide Broadband Inventory Map.

Q: Is broadband service available in the area where you live?

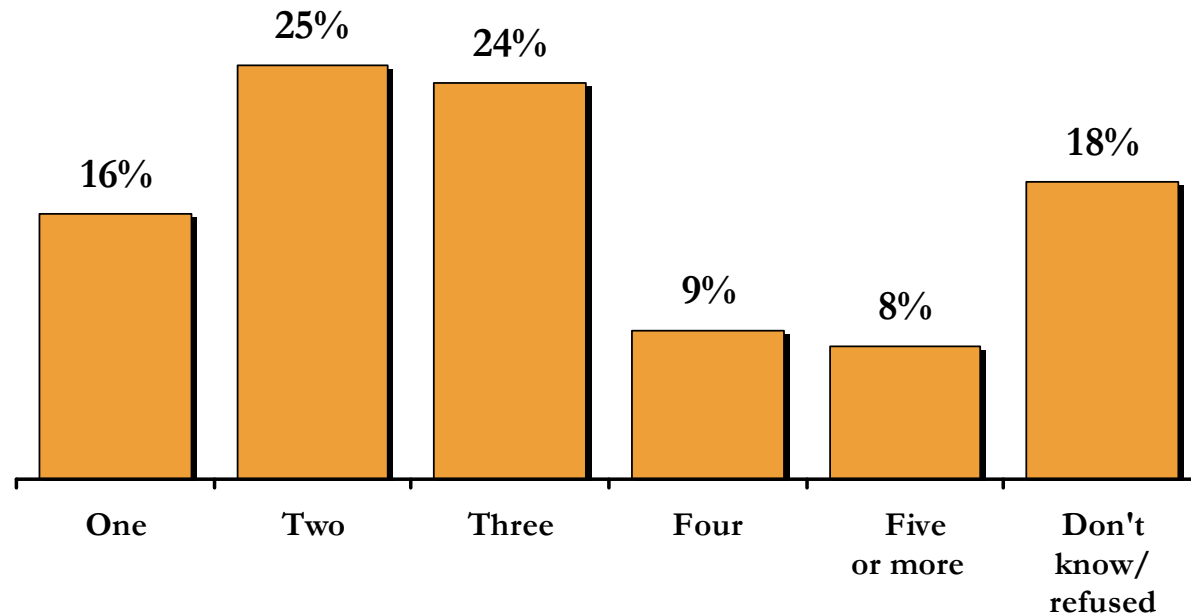
(n=1,200 OH residents)

2009 © Connect Ohio[®]

Number of Broadband Providers Available to Consumers

The number of broadband providers Ohio broadband subscribers are aware of

On average, Ohio broadband subscribers are aware of 2.7 providers who offer service where they live.



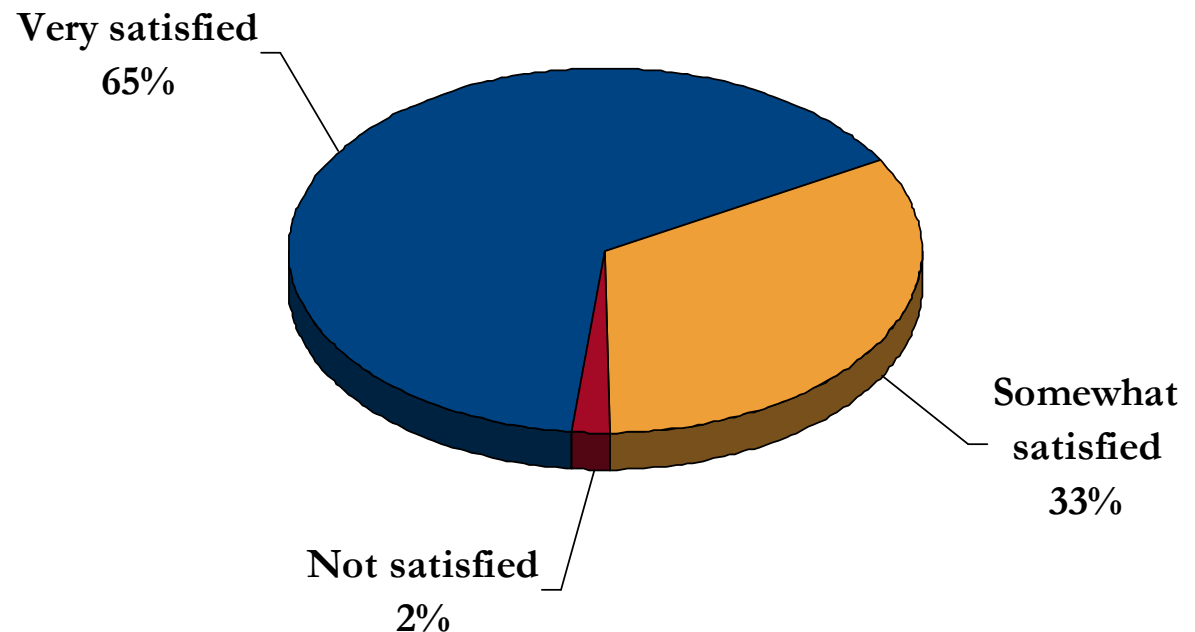
Number of Providers

Q: To the best of your knowledge, how many broadband providers do you have to choose from, in your area?
 (n=733 OH residents with broadband service at home)
 2009 © Connect Ohio®

Satisfaction With Home Broadband Service

Among Ohio broadband subscribers

Overall, only 2% of Ohio broadband subscribers report being dissatisfied with their broadband service.

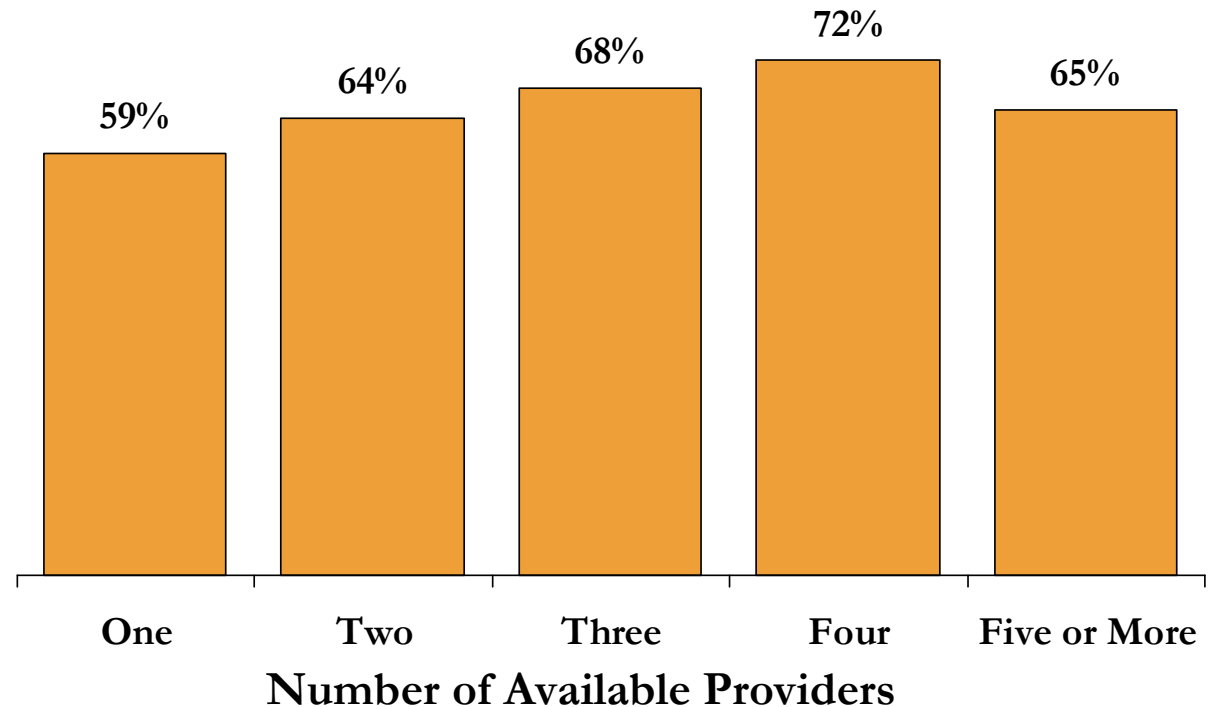


Broadband Satisfaction

By Number of Available Broadband Providers

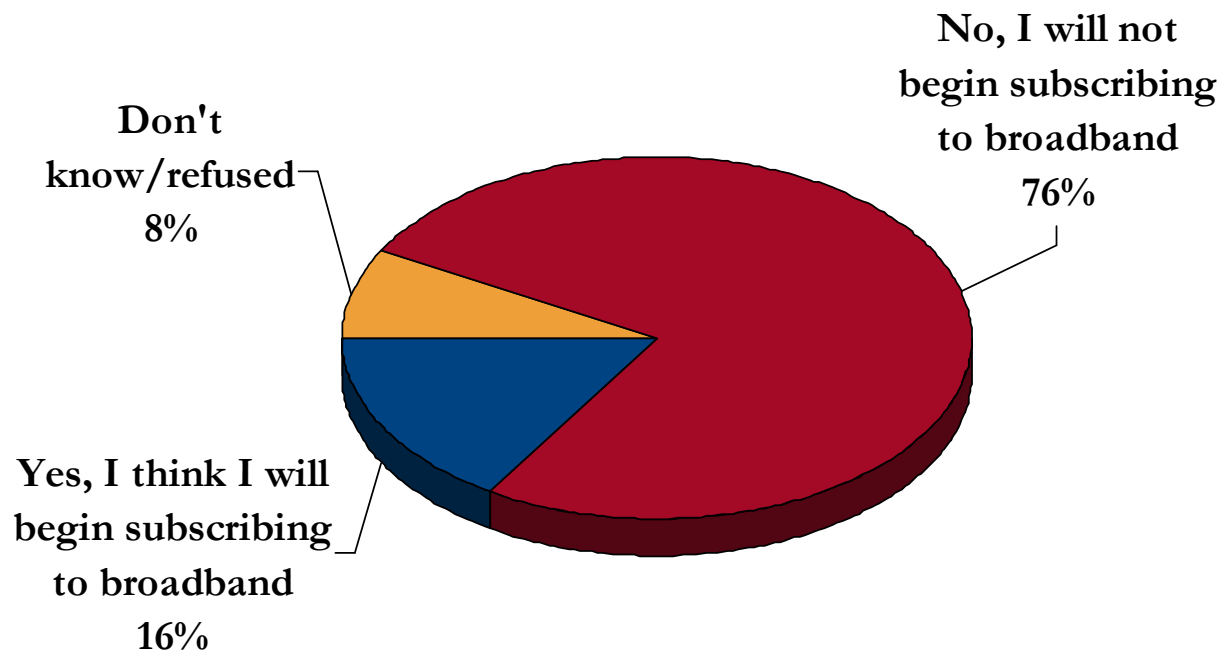
Percent of Ohio broadband subscribers who are “very satisfied” with their current broadband service

Satisfaction levels among broadband subscribers tend to remain steady, regardless of the number of providers available to the respondent.



Likelihood of Upgrading to Broadband in the Next Year

Among Ohio dial-up users who say broadband service is available where they live



Only 16% of dial-up users who choose not to subscribe to broadband, despite it being available where they live, plan to upgrade their service in the next year.

Q: In the next twelve months, do you think you will begin subscribing to broadband service?

(n=63 OH dial-up subscribers who are aware of available broadband service where they live)

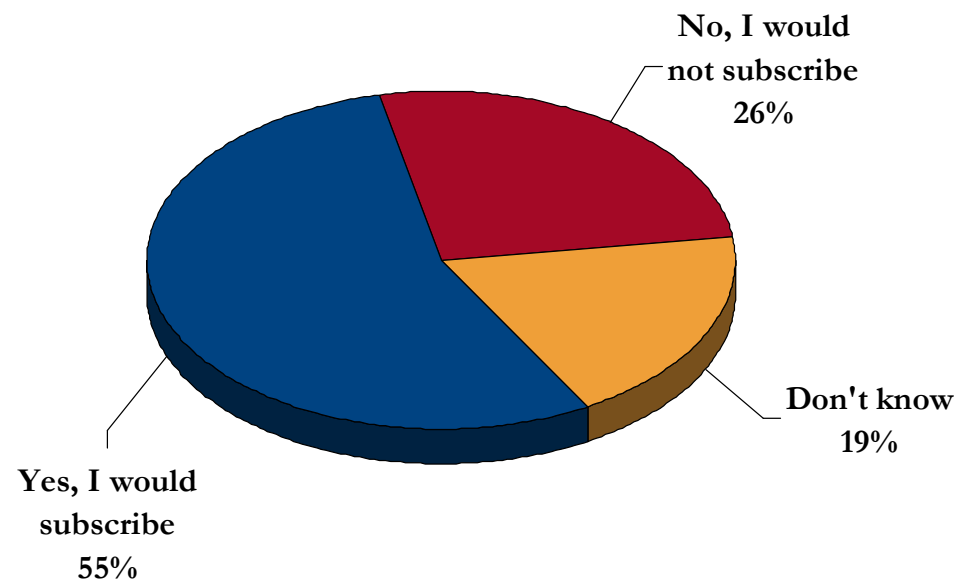
2009 © Connect Ohio®

Lack of Availability as a Barrier to Broadband Adoption

More than one-half of those who say broadband service is not available to them say they would subscribe if broadband became available.

Nearly an equal number of respondents, though, said they would not subscribe, or they did not know if they would subscribe even if broadband were available to them.

Among Ohio residents who say broadband service is not available where they live



Q: Would you sign up for broadband service if it were available in your area?

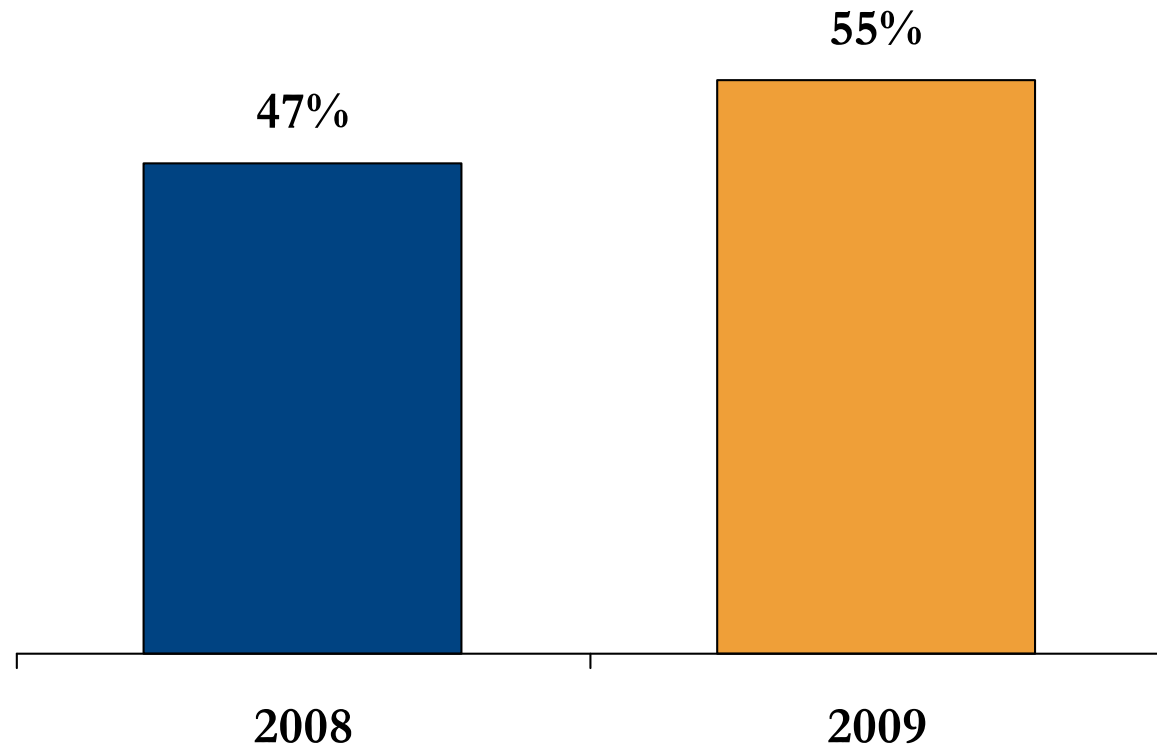
(n=100 OH dial-up subscribers who say broadband service is not available where they live)

2009 © Connect Ohio[®]

Lack of Availability as a Barrier to Broadband Adoption

Ohio residents without home broadband service who say they would subscribe to broadband if it were available where they live

Among Ohio residents without home broadband service, the percent who said they would subscribe to broadband if it were available increased by 17%.



Q: Would you sign up for broadband service if it were available in your area?

(n= 100 OH residents who say broadband service is not available where they live in 2009)

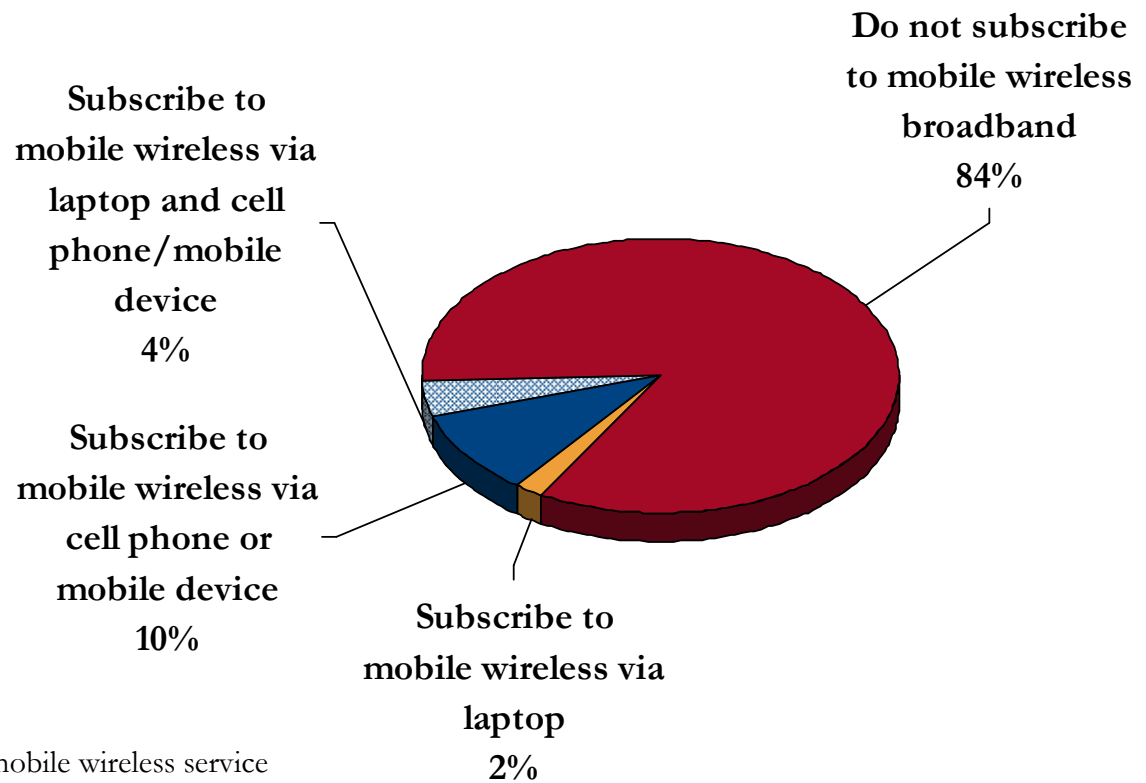
(n= 95 OH residents who say broadband service is not available where they live in 2008)

2009 © Connect Ohio®

Mobile Wireless Broadband Adoption

Percent of all Ohio residents

Although one-third of Ohio residents own a laptop computer, and nearly four out of five residents own a cellular phone, the vast majority of Ohio residents (84%) do not subscribe to mobile wireless broadband.



Q: On your laptop computer, do you subscribe to mobile wireless service that allows you to access the Internet through a cellular network? And

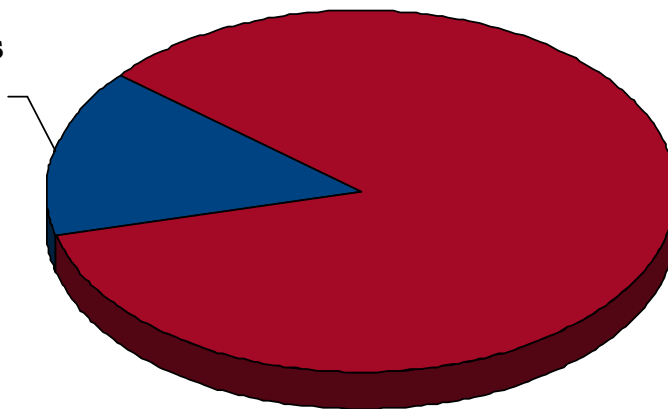
Q: Do you access the Internet through a cellular phone or mobile device?
(n=1,200 OH residents)

2009 © Connect Ohio[®]

Home Telephone Calls Through a Broadband Connection (VoIP)

Among Ohio residents with home broadband service

Yes, I make or receive home telephone calls through my broadband connection
15%



No, I do not make or receive home telephone calls through my broadband connection
85%

Statewide, 15% of Ohio residents make or receive home telephone calls through their Internet connection, using a service called VoIP.

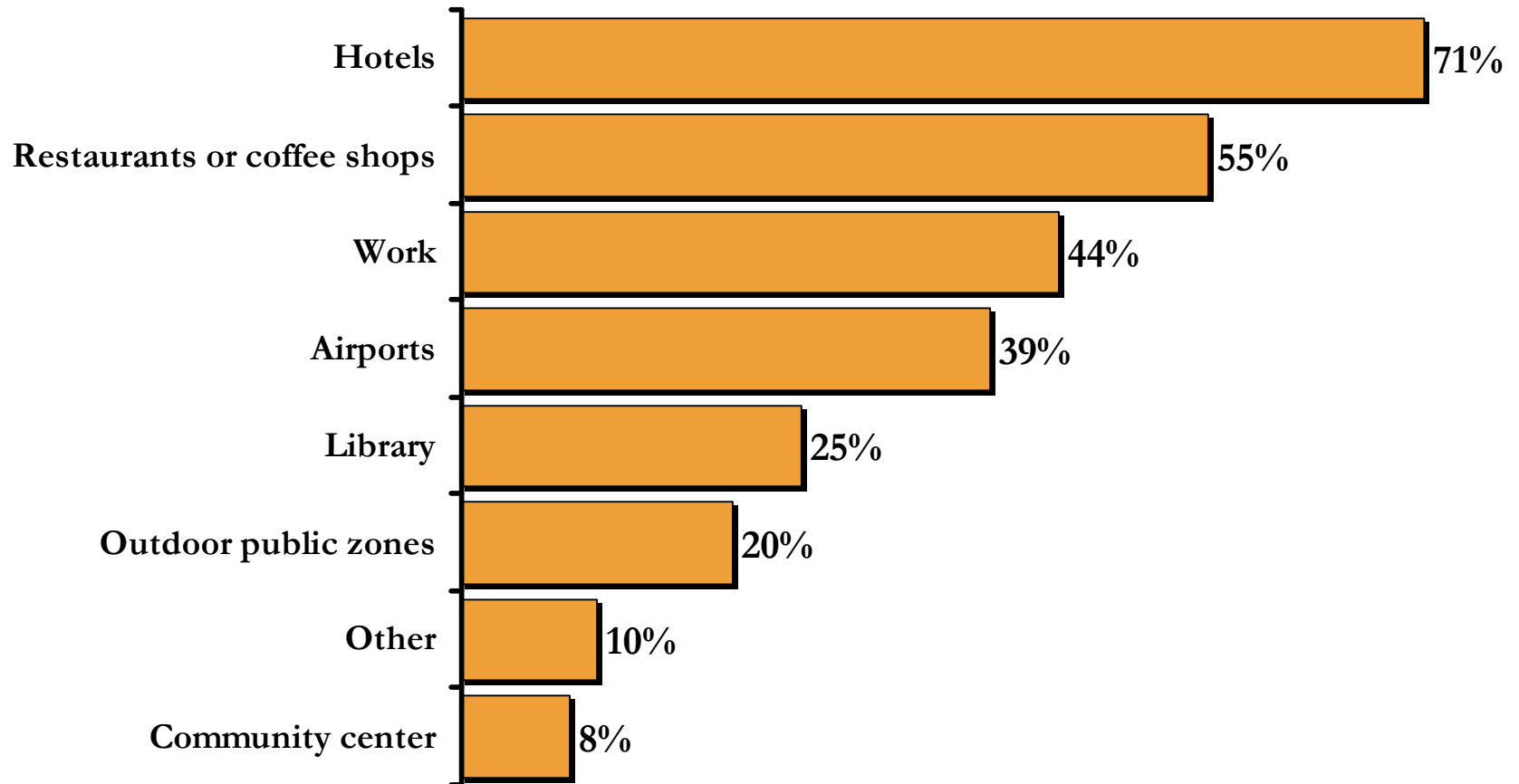
Q: Do you make or receive home telephone calls through your Internet connection?

(n=733 OH residents with home broadband service)

2009 © Connect Ohio®

Wi-Fi Zone (“Hot Spot”) Usage

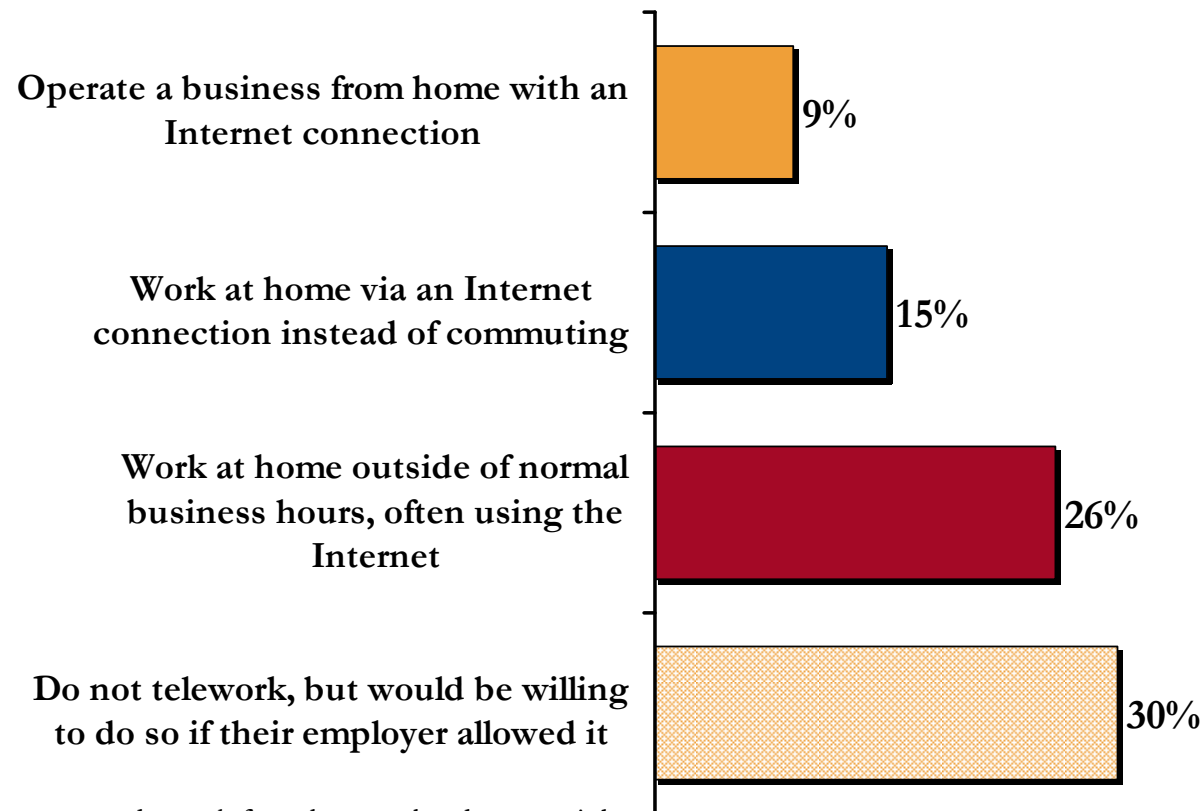
Top Wi-Fi zones (among residents who use hot spots)



Q: Do you regularly use hot spots at any of the following locations?
(n=175 OH residents who use Wi-Fi hot spots)
2009 © Connect Ohio®

Ohio Residents and Telework

Among Ohio residents employed full- or part-time



Statewide, 15% of employed Ohio adults use their Internet connection to work from home instead of commuting to an office, while an additional 30% say they do not currently telework, but would be willing to do so if their employers allowed it.

Q: Do you ever do work from home related to your job or self employment?

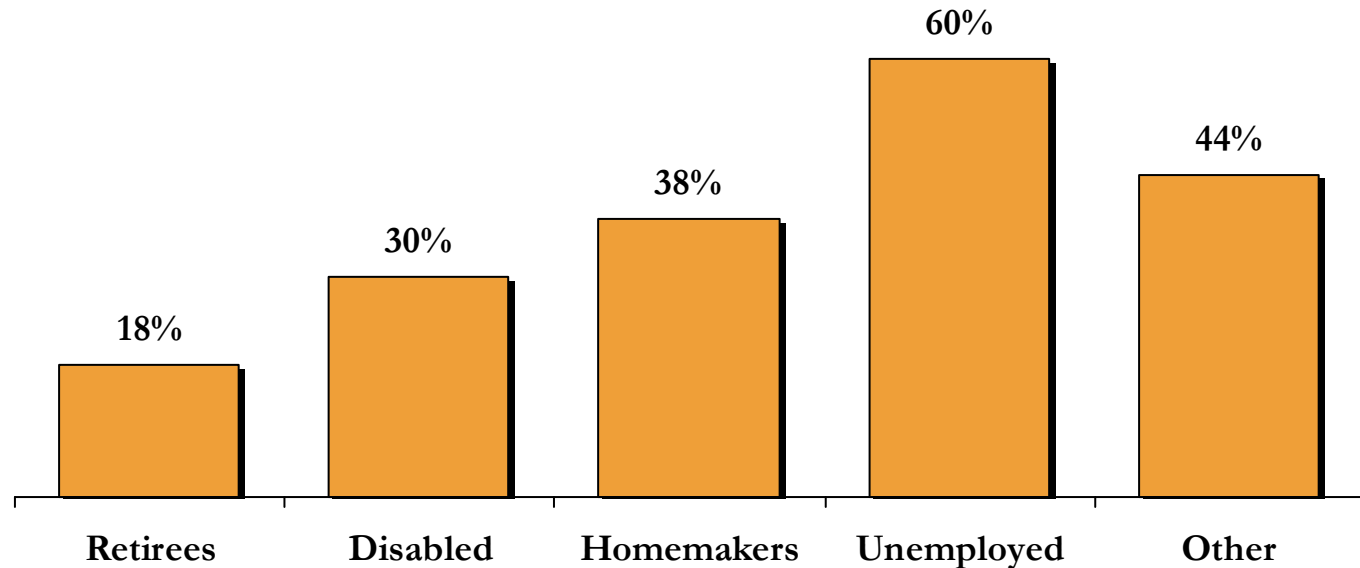
(n=688 OH residents employed full- or part-time)

2009 © Connect Ohio®

Telework's Potential Impact on the Labor Force

Percent of Ohio adults who don't work, but would be likely to join the labor force if allowed to telework

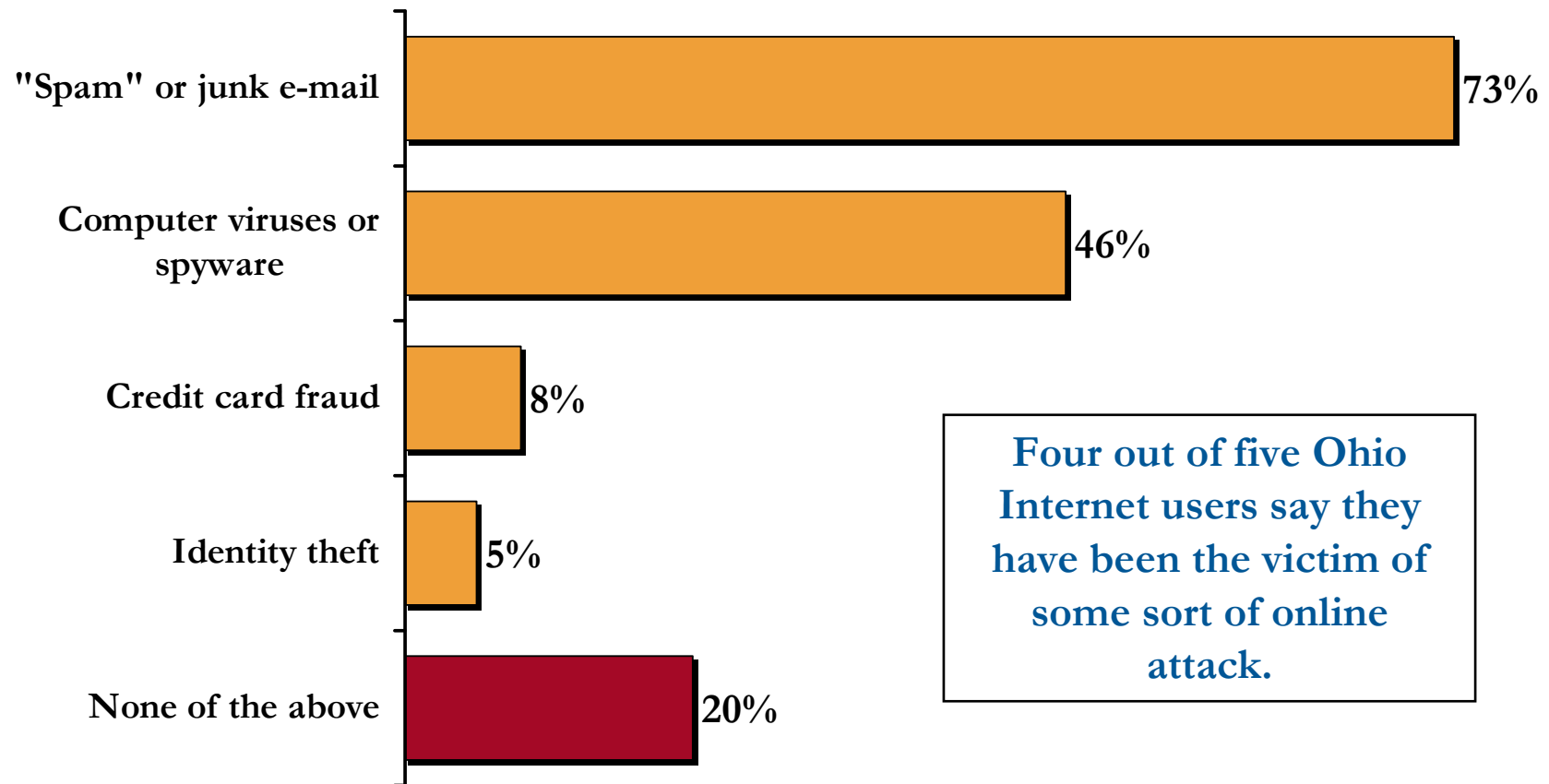
32% of all non-working Ohio adults would likely join the labor force if empowered to telework. This figure is up from 24% just one year ago.



Q: If you were able to work from home through a broadband connection - commonly known as teleworking - how likely is it that you would work outside the home? (n=512 OH residents not employed full- or part-time)
 2009 © Connect Ohio®

Online Victimization Among Ohio Internet Users

Percent of Ohio Internet users who have been a victim of the following



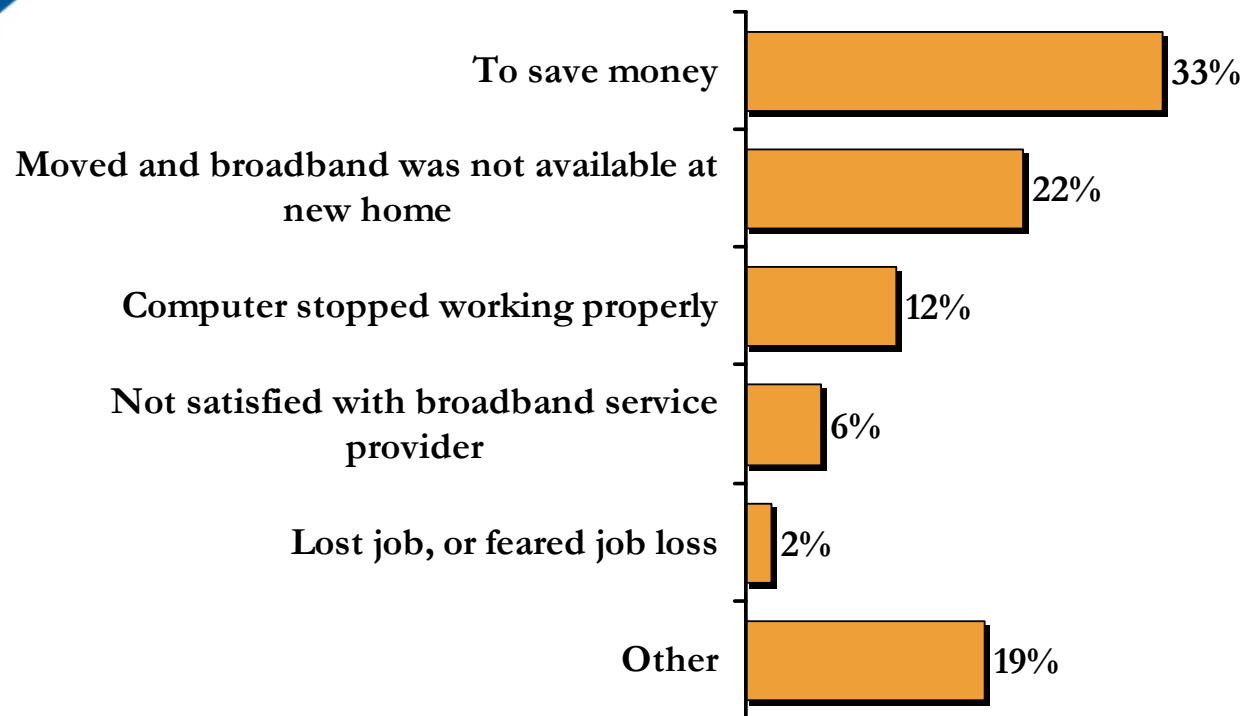
Q: Have you ever been a victim to any of the following [issues] through the Internet?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Reasons for Dropping Home Broadband Service

Among Ohio residents who previously subscribed to broadband at home*



Among Ohio adults without broadband at home, only 9% have previously subscribed to broadband Internet service. Of those, 71% dropped their service more than a year ago.

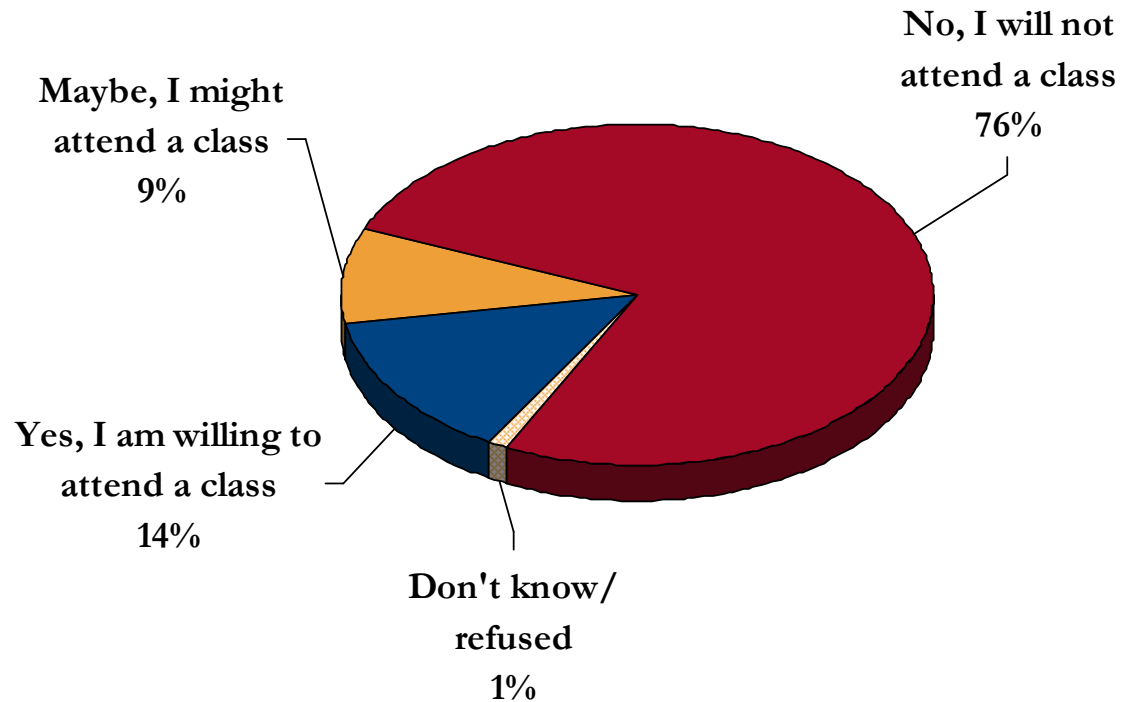
*Percentages do not add up to 100% because respondents could give multiple responses.

Q: Why did you stop subscribing to broadband service?
(n=34 OH residents with no home broadband service)

Willingness to Attend a Free Broadband Training Class

Percent of Ohio residents who don't use the Internet at all

More than three out of four respondents who do not use the Internet said they would not attend a free two-hour class to learn how to obtain and use home broadband service.

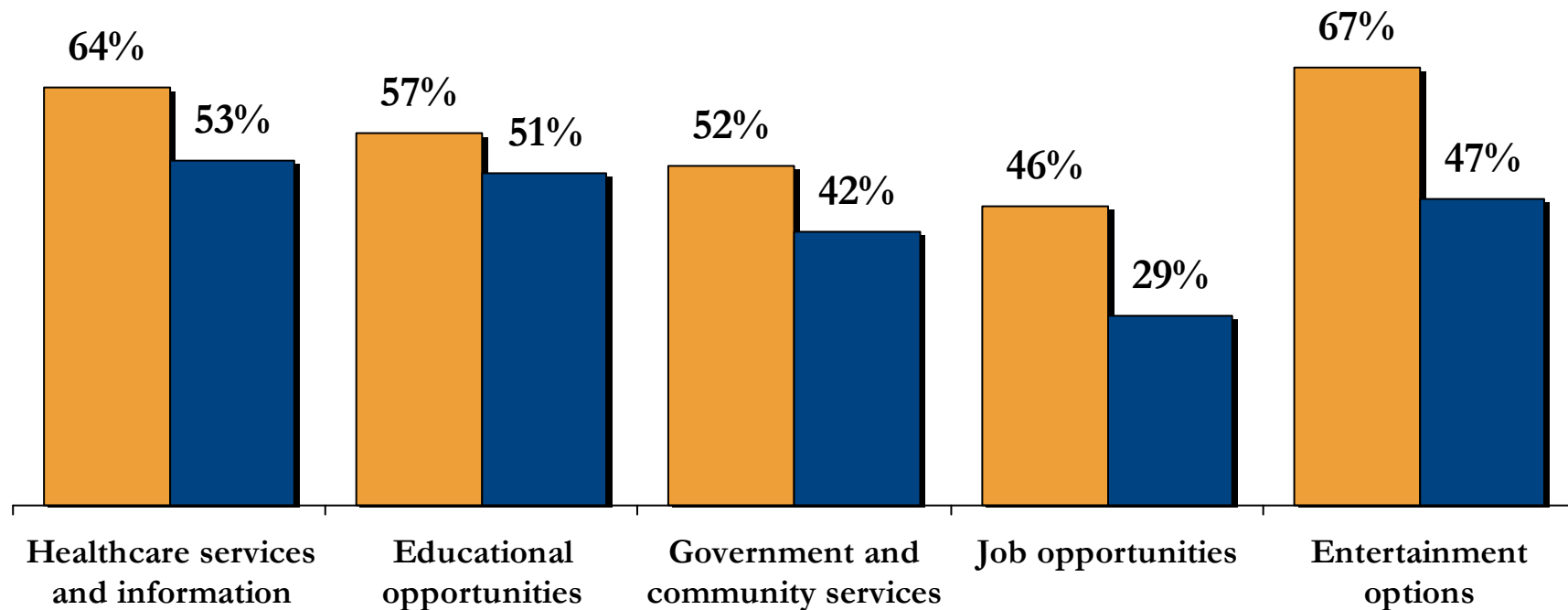


Q: If your local school or library offered a free 2-hour class on how to obtain and use home broadband service, would you be willing to attend?
(n=236 OH residents who don't use the Internet)

Access to Resources

Percent of Ohio residents who report having above-average* access to the following resources

■ Broadband at home
 ■ Without broadband at home



*Above average=a rating of 4-5 on a 5-point scale, where 5=excellent and 1=poor.

Q: How would you rate your current access to the following resources?
(n=1,200 OH residents)

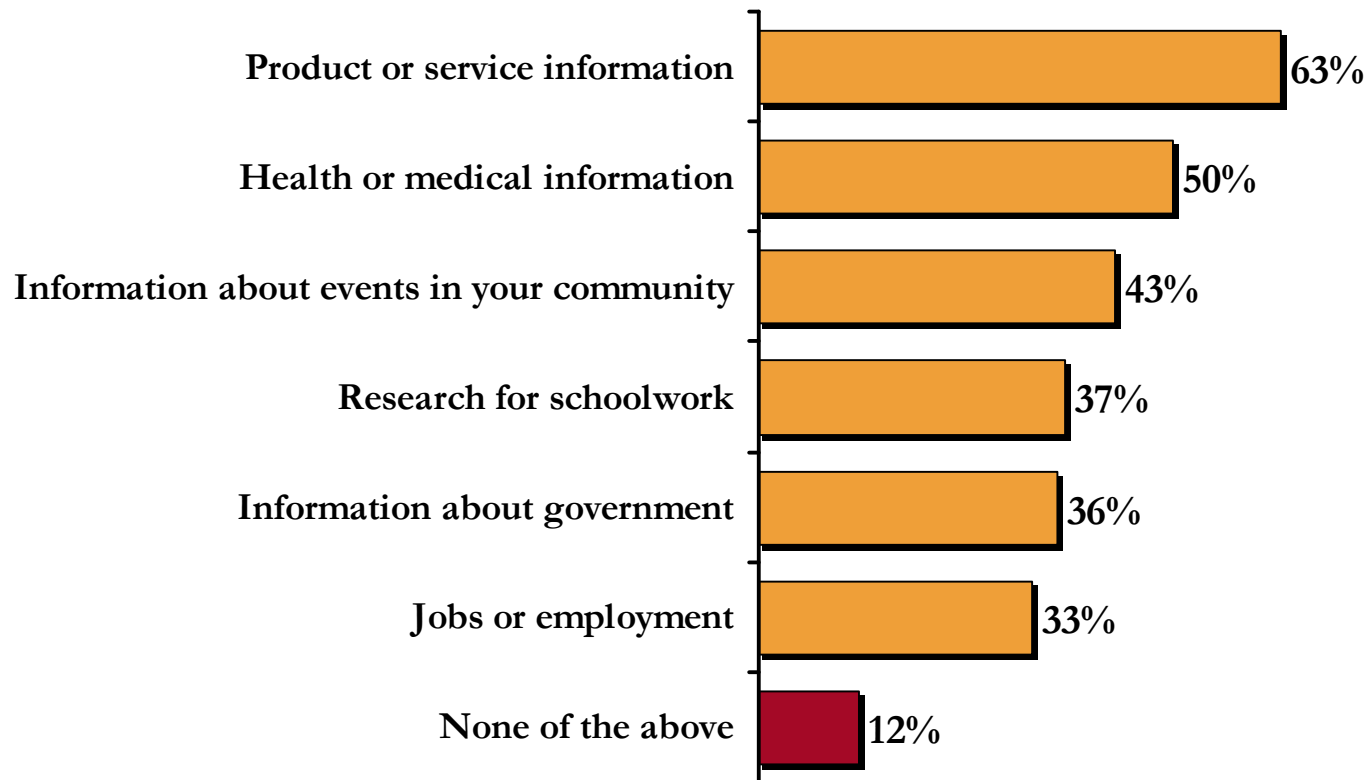
2009 © Connect Ohio®

This page intentionally left blank.

Online Activities Among Ohio Internet Users

Searching For Information Online

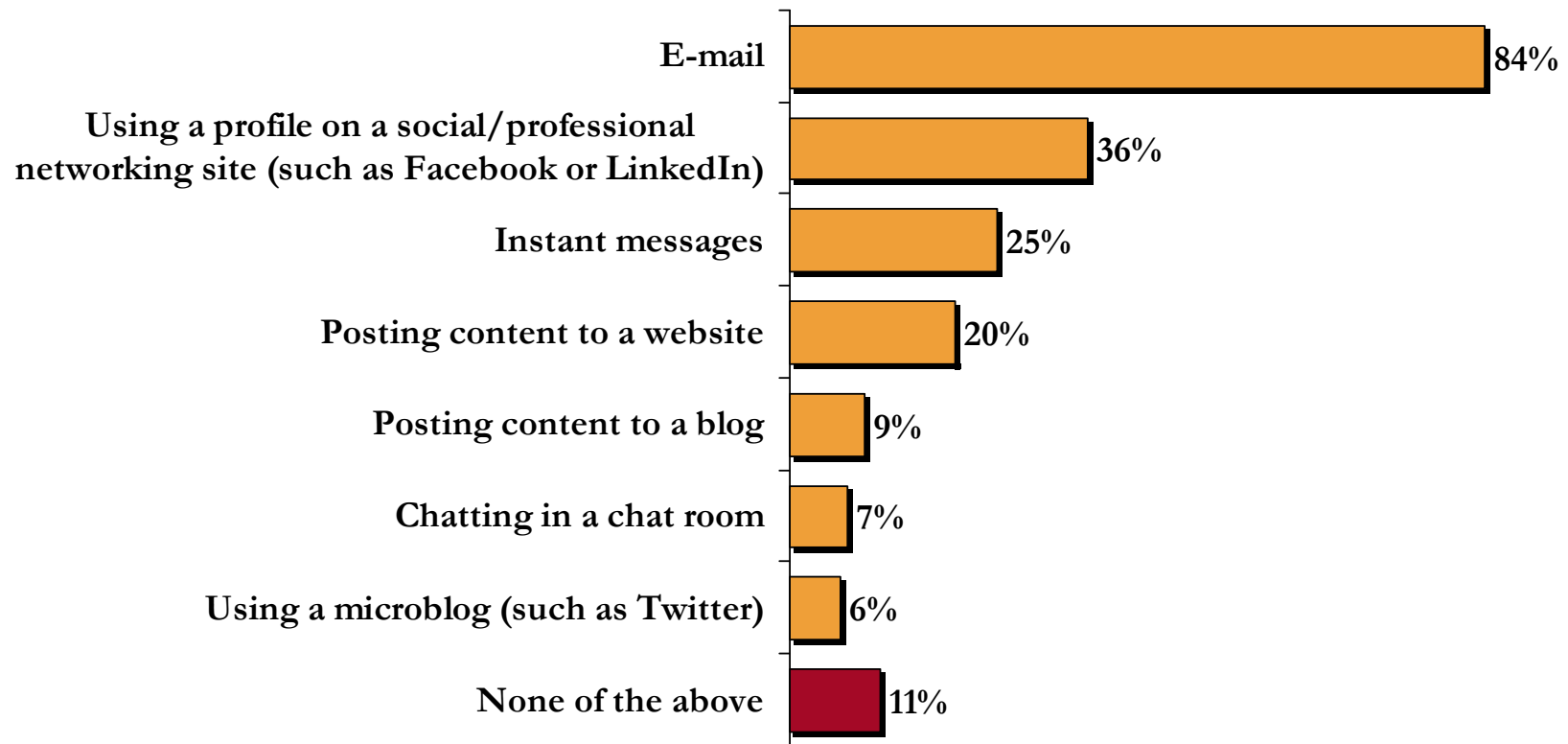
Percent of Ohio Internet users who search for the following types of information



Q: In the past 30 days, which of the following types of information have you used the internet to look for online?
 (n=964 OH residents who use the Internet)
 2009 © Connect Ohio®

Communicating With Others Online

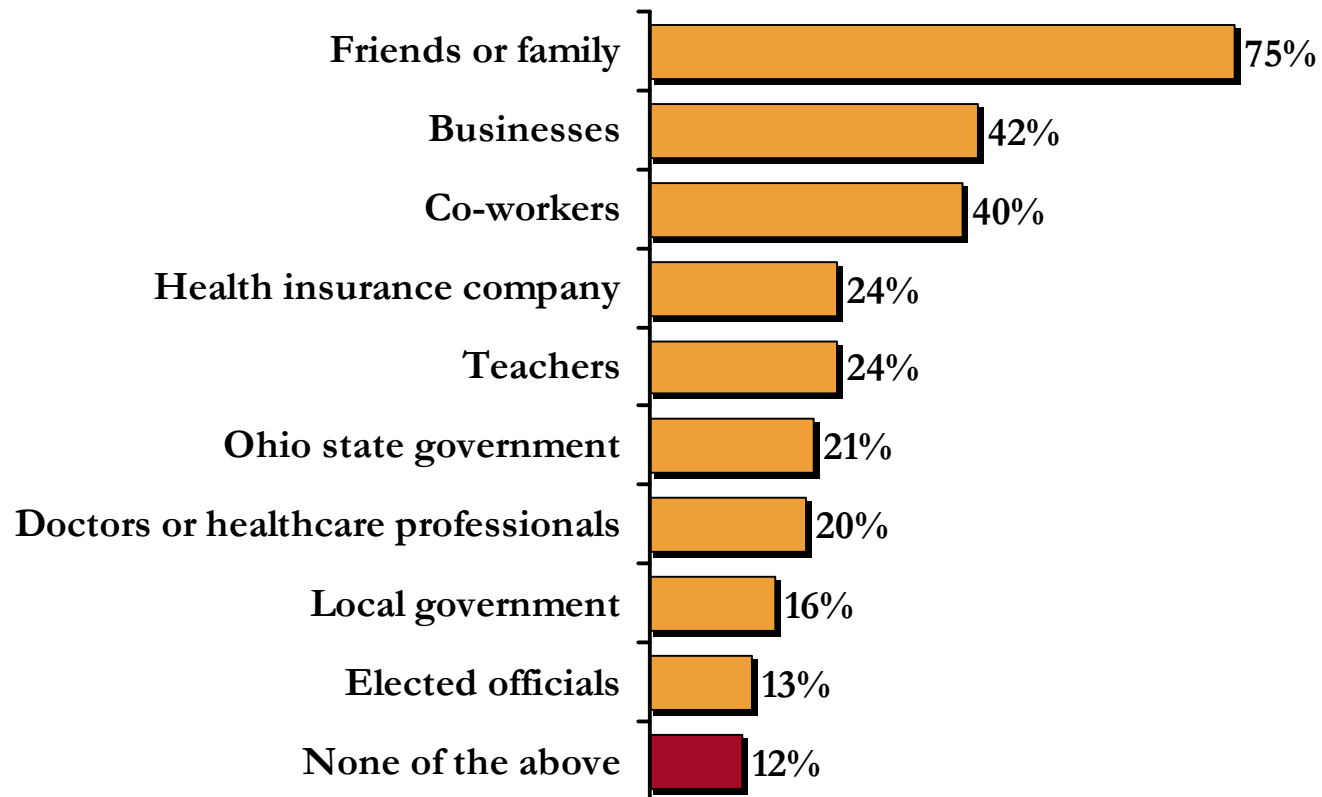
Percent of Ohio Internet users
who communicate with others in the following ways



Q: Which of the following ways of communicating with others do you use?
(n=964 OH residents who use the Internet)
2009 © Connect Ohio®

Interacting Online

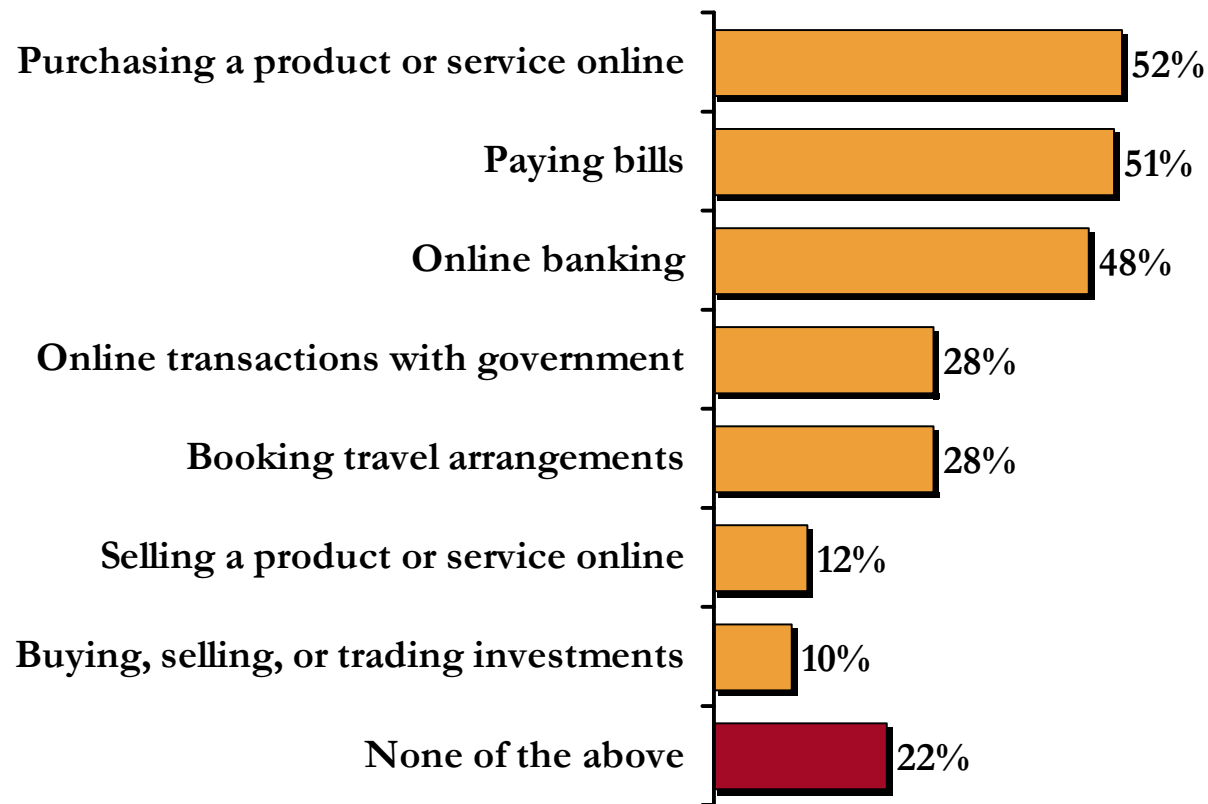
Percent of Ohio Internet users
who interact with the following individuals or organizations



Q: Which of the following types of individuals or organizations have you interacted with online, by visiting a website or communicating online to obtain information?
(n=964 OH residents who use the Internet)
2009 © Connect Ohio®

Online Transactions

Percent of Ohio Internet users who conduct the following transactions online



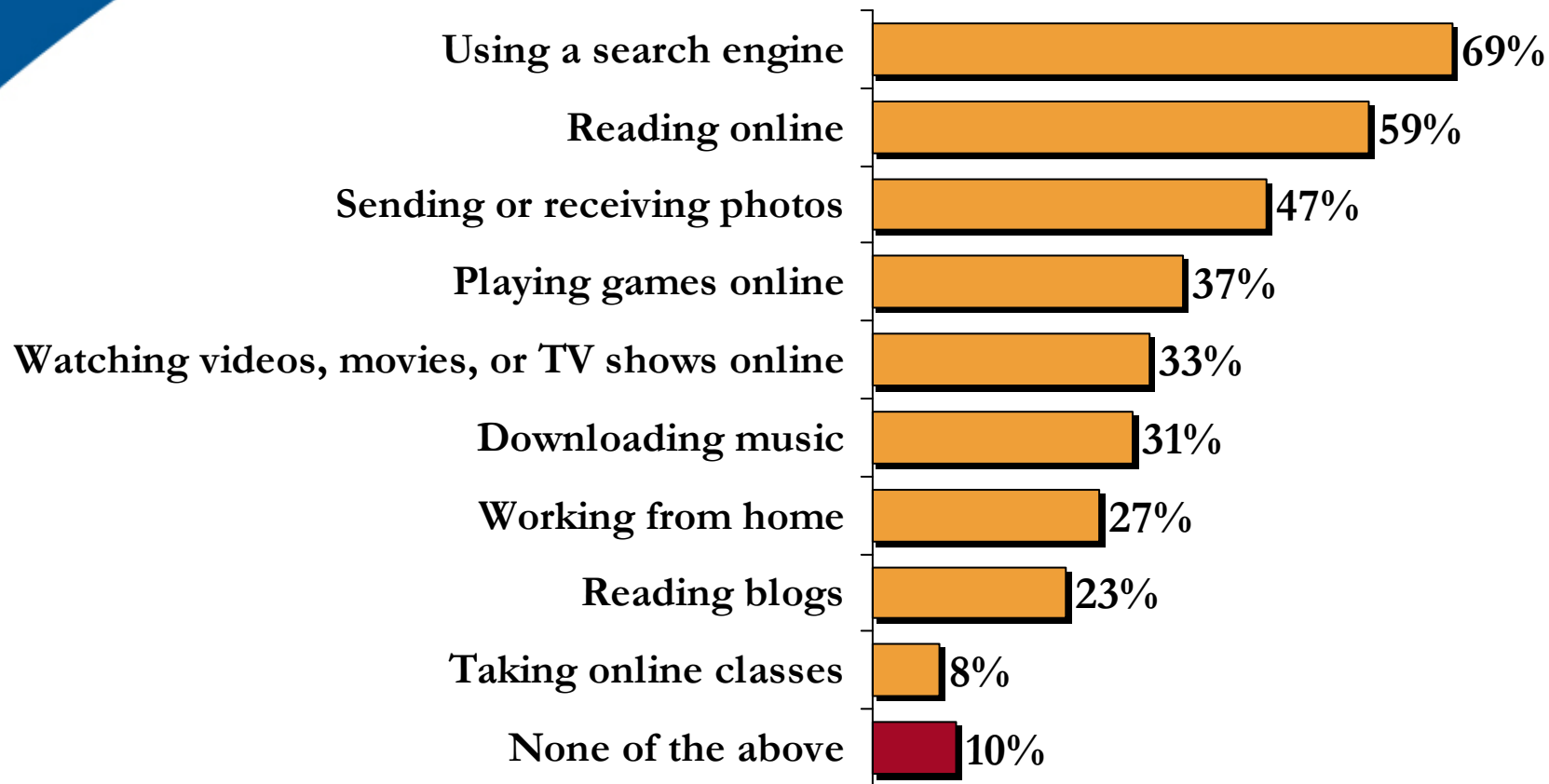
Q: Which of the following types of transactions have you completed online?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Online Activities

Percent of Ohio Internet users
who conduct the following activities online

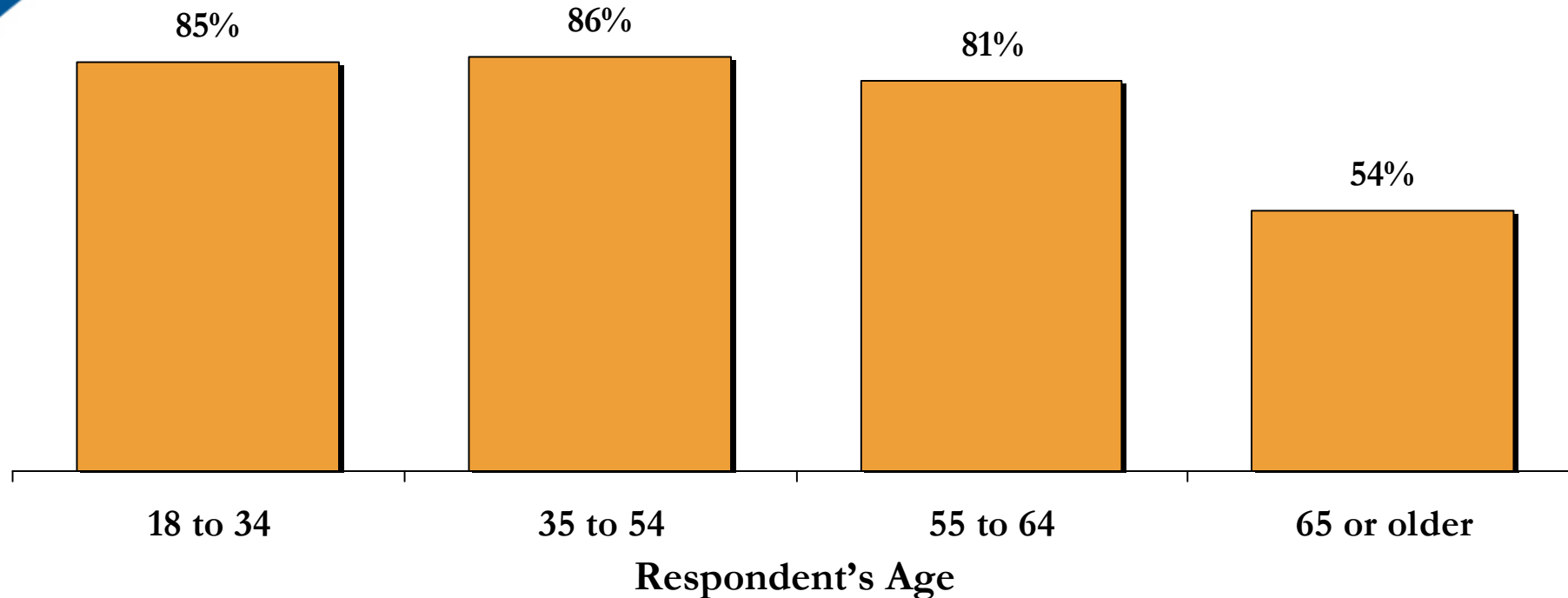


Q: Which of the following activities do you conduct online?
(n=964 OH residents who use the Internet)
2009 © Connect Ohio®

Residential Technology Assessment by Age

Ohio Residents With a Computer at Home

Percent of Ohio residents who have a computer at home

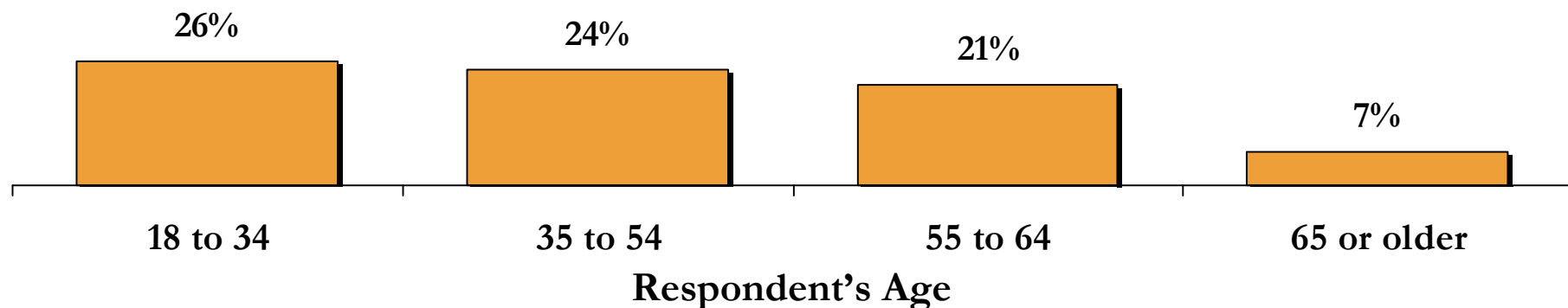


Statewide Average: 79% of Ohio residents report having a personal computer at home.

Q: Do you have a computer at home?
(n=1,200 OH residents)
2009 © Connect Ohio®

Computer Purchases in the Last Year

Residents who have purchased a new home computer within the last year

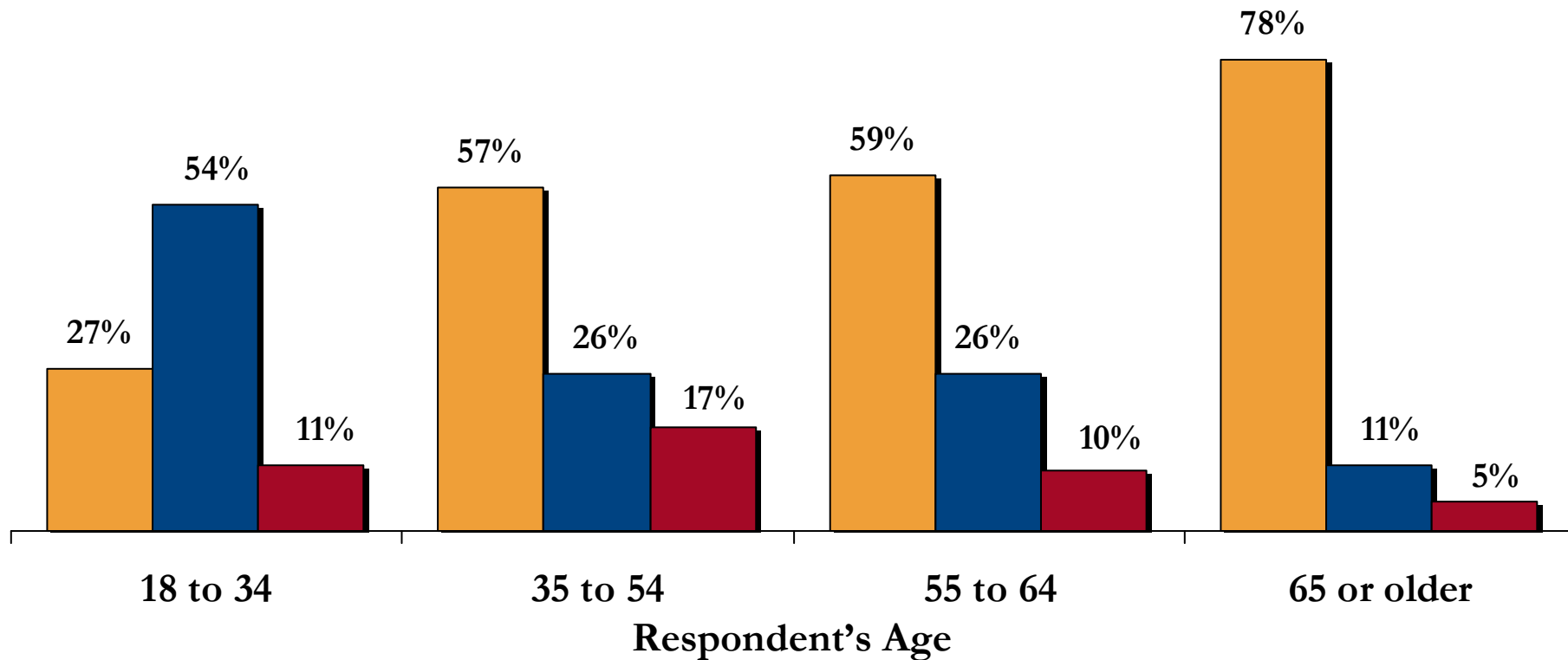


Statewide Average: 21% of Ohio adults report purchasing a new computer last year.

Barriers to Computer Ownership

Among Ohio residents who do not own a home computer

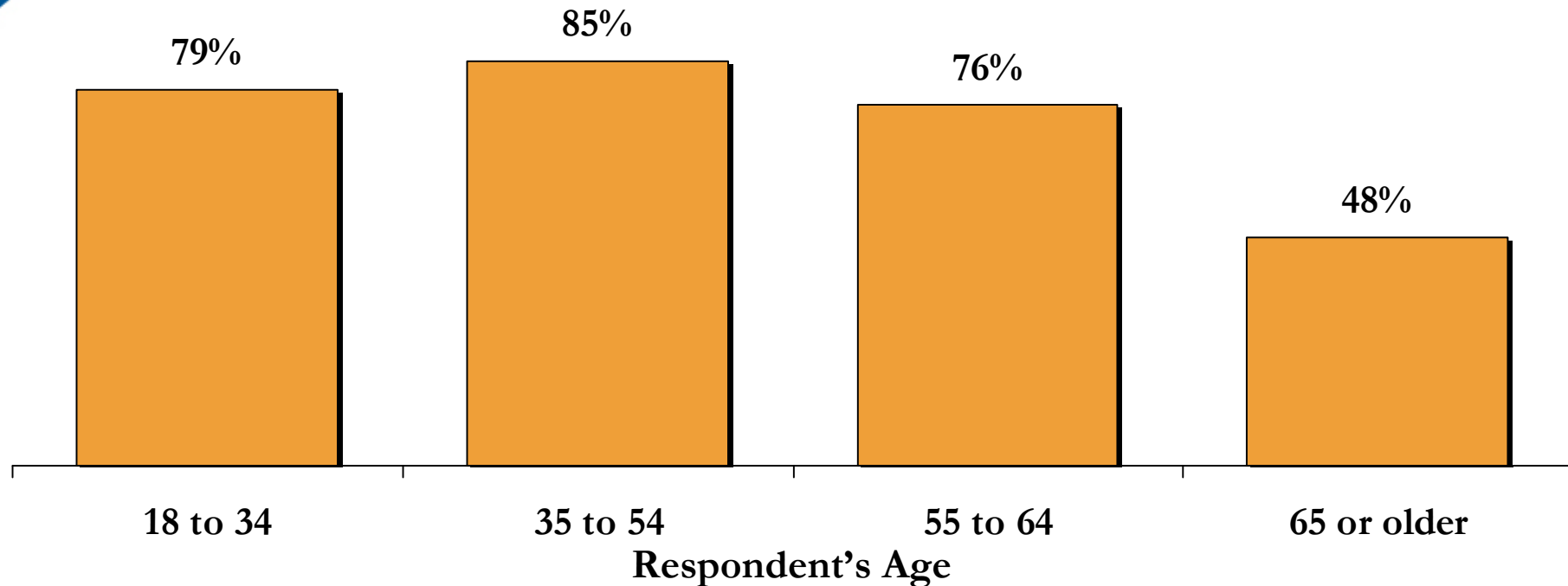
■ Don't need a computer
 ■ Too expensive
 ■ Use a computer at a different location



Q: Why don't you have a computer at home?
 (n=258 OH residents with no computer in their household)
 2009 © Connect Ohio®

Ohio Residents With an Internet Connection at Home (Either Dial-Up or Broadband)

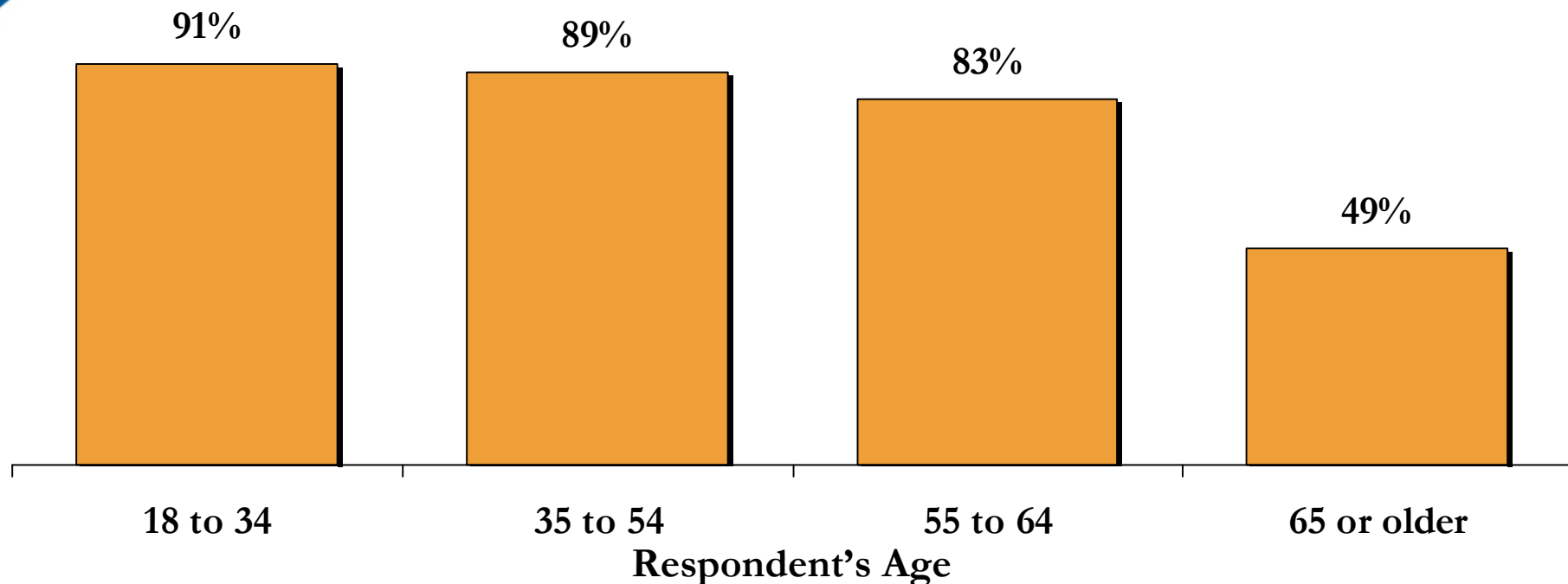
Percent of Ohio residents who access the Internet from home



Statewide Average: 75% of Ohio residents report having an Internet connection at home (dial-up or broadband).

Ohio Residents Who Access the Internet (Dial-Up or Broadband) From Home or Some Other Place

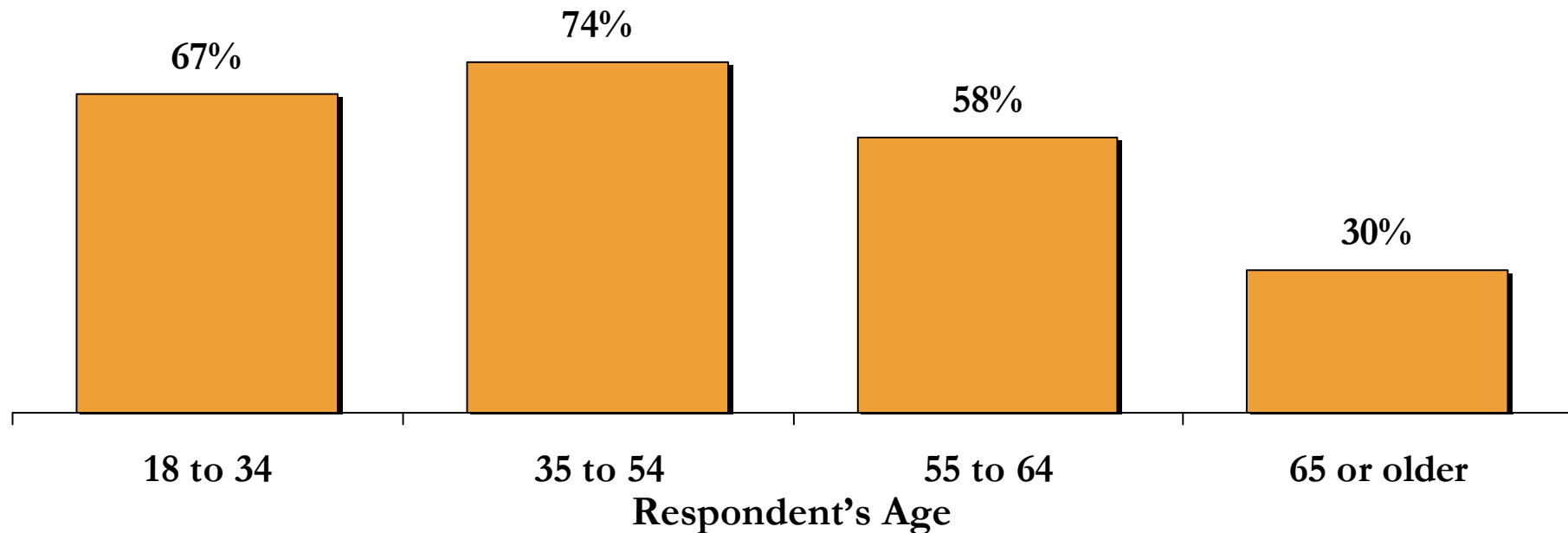
Percent of Ohio residents who access the Internet from home or some other place



Statewide Average: 82% of Ohio residents report using the Internet at home or someplace else.

Ohio Residents With Home Broadband Service

Percent of all Ohio residents who access broadband from home



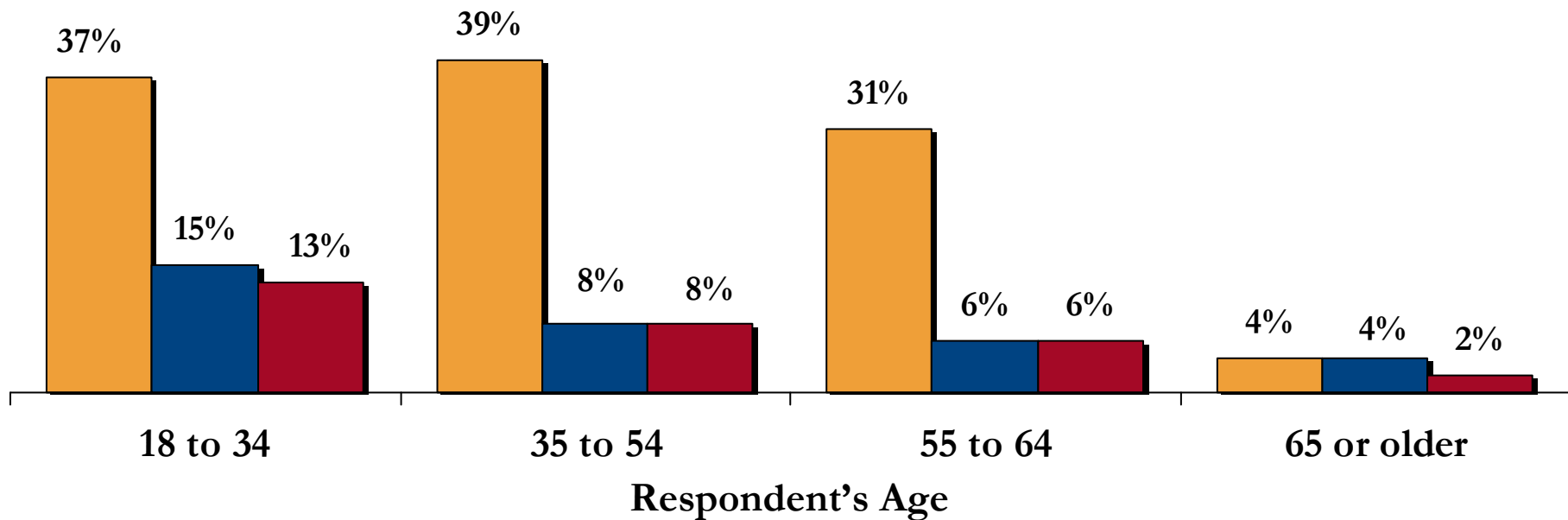
Statewide Average: 62% of all Ohio residents have home broadband service.

Q: Which of the following describe the type of Internet service you have at home?
(n=1,200 OH residents)
2009 © Connect Ohio®

Most Popular Places for Ohio Residents to Access the Internet

Percent of all Ohio residents who access the Internet at the following locales



■ At work
 ■ At someone else's home
 ■ At the library



Q: At what locations do you have access to the Internet?
 (n=1,200 OH residents)
 2009 © Connect Ohio®

Searching for Information Online

Percent of Ohio Internet users who search for the following types of information online

Percentage is significantly* <i>higher</i> than the state average: 				
Percentage is significantly* <i>lower</i> than the state average: 	18 to 34	35 to 54	55 to 64	65 or older
Product or service information	60%	69%	61%	50%
Health or medical information	45%	53%	47%	54%
Information about events in your community	43%	50%	34%	33%
Research for schoolwork	44%	44%	21%	8%
Information about government services	33%	42%	30%	32%
Jobs or employment	43%	35%	25%	9%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of information have you used the internet to look for online?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Communicating Online

Percent of Ohio Internet users who communicate with others in the following ways

Percentage is significantly* <i>higher</i> than the state average: 	18 to 34	35 to 54	55 to 64	65 or older
Percentage is significantly* <i>lower</i> than the state average: 				
E-mail	81%	87%	86%	81%
Instant messages	31%	26%	18%	11%
Posting content to a website	28%	18%	14%	9%
Chatting in chat rooms	9%	7%	5%	1%
Posting content to a blog	15%	8%	5%	1%
Social or professional networking sites such as Facebook	57%	34%	15%	8%
Microblogs such as Twitter	12%	5%	2%	0%



*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following ways of communicating with others have you used?
(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Interacting Online

Percent of Ohio Internet users who interact with the following individuals or organizations

Percentage is significantly* <i>higher</i> than the state average: 	18 to 34	35 to 54	55 to 64	65 or older
Percentage is significantly* <i>lower</i> than the state average: 				
Friends or family	75%	75%	77%	71%
Companies with which you do business	37%	48%	39%	34%
Co-workers	42%	45%	35%	15%
Health insurance company	22%	26%	26%	20%
Teachers	25%	31%	13%	7%
Ohio state government	16%	25%	28%	16%
Doctors or healthcare professionals	22%	19%	18%	22%
Local government	12%	21%	15%	10%
Elected officials	10%	16%	13%	13%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of individuals or organizations have you interacted with online, by visiting a website or communicating online to obtain information?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Online Transactions

Percent of Ohio Internet users who conduct the following transactions online

	18 to 34	35 to 54	55 to 64	65 or older
Percentage is significantly* <i>higher</i> than the state average: 				
Percentage is significantly* <i>lower</i> than the state average: 				
Purchasing a product or service online	50%	57%	51%	41%
Booking travel arrangements	22%	33%	29%	23%
Paying bills	59%	55%	42%	26%
Online banking	51%	54%	39%	28%
Online transactions with government	28%	32%	31%	11%
Selling a product or service online	13%	15%	7%	5%
Buying, selling, or trading investments	11%	11%	7%	8%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of transactions have you completed online?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Online Activities

Percent of Ohio Internet users who conduct the following activities online

	18 to 34	35 to 54	55 to 64	65 or older
Percentage is significantly* <i>higher</i> than the state average: 				
Percentage is significantly* <i>lower</i> than the state average: 				
Using a search engine	74%	74%	57%	51%
Sending or receiving photos	53%	48%	37%	39%
Reading newspapers or other news sources	61%	63%	53%	45%
Playing games online	44%	37%	31%	29%
Downloading music	41%	32%	17%	11%
Watching videos, movies, or TV shows online	45%	34%	16%	14%
Working from home	28%	32%	25%	13%
Reading blogs	35%	21%	11%	8%
Taking online classes	12%	8%	7%	2%

*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following activities have you conducted online?
(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Barriers to Internet Adoption

Percent of Ohio residents who have no home Internet service for the following reasons

Percentage is significantly* <i>higher</i> than the state average: Percentage is significantly* <i>lower</i> than the state average:	18 to 34	35 to 54	55 to 64	65 and older
I don't own a computer	47%	61%	58%	48%
I don't need the Internet	25%	31%	42%	54%
Too expensive	29%	25%	27%	13%
I can get Internet access somewhere else	8%	14%	12%	11%
Broadband isn't available, and I don't want dial-up	15%	7%	4%	2%
Concerns about fraud or identity theft	6%	9%	19%	9%

The lack of a home computer or a perceived lack of demand is the top barrier to Internet adoption among each age group.

*Significance measured at a 95% confidence level



Q: Why don't you subscribe to the Internet at home?

(n=300 OH residents with no Internet service in their household)

2009 © Connect Ohio®

Internet Victimization

Percent of Ohio Internet users who have been victims of the following

Percentage is significantly* <i>higher</i> than the state average: 	18 to 34	35 to 54	55 to 64	65 or older
Percentage is significantly* <i>lower</i> than the state average: 				
Spam or junk e-mail	74%	78%	68%	59%
Computer viruses or spyware	49%	51%	40%	29%
Credit card fraud	10%	9%	3%	7%
Identity theft	7%	6%	2%	3%
None of the above	17%	16%	26%	36%

*significance measured at a 95% confidence level

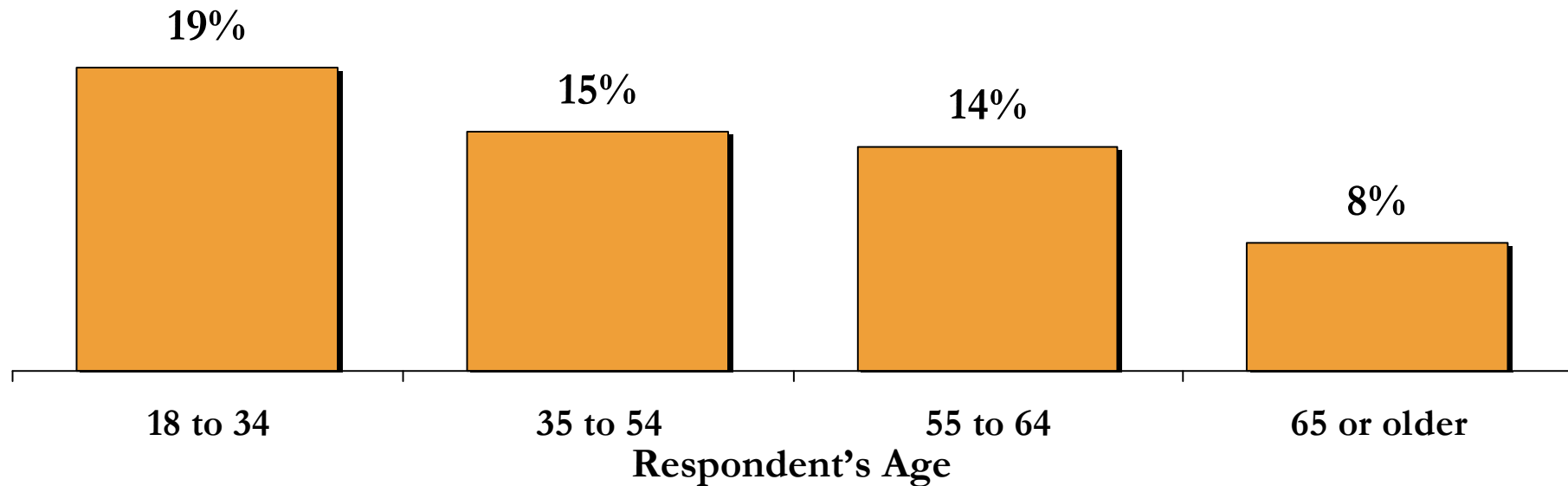
Q: Have you ever been a victim to any of the following [issues] through the Internet?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Home Telephone Calls Through a Broadband Connection (VoIP)

Among Ohio residents with home broadband service



Statewide Average: 15% of Ohio residents with home broadband service say they make or receive home telephone calls through their broadband connection (VoIP).

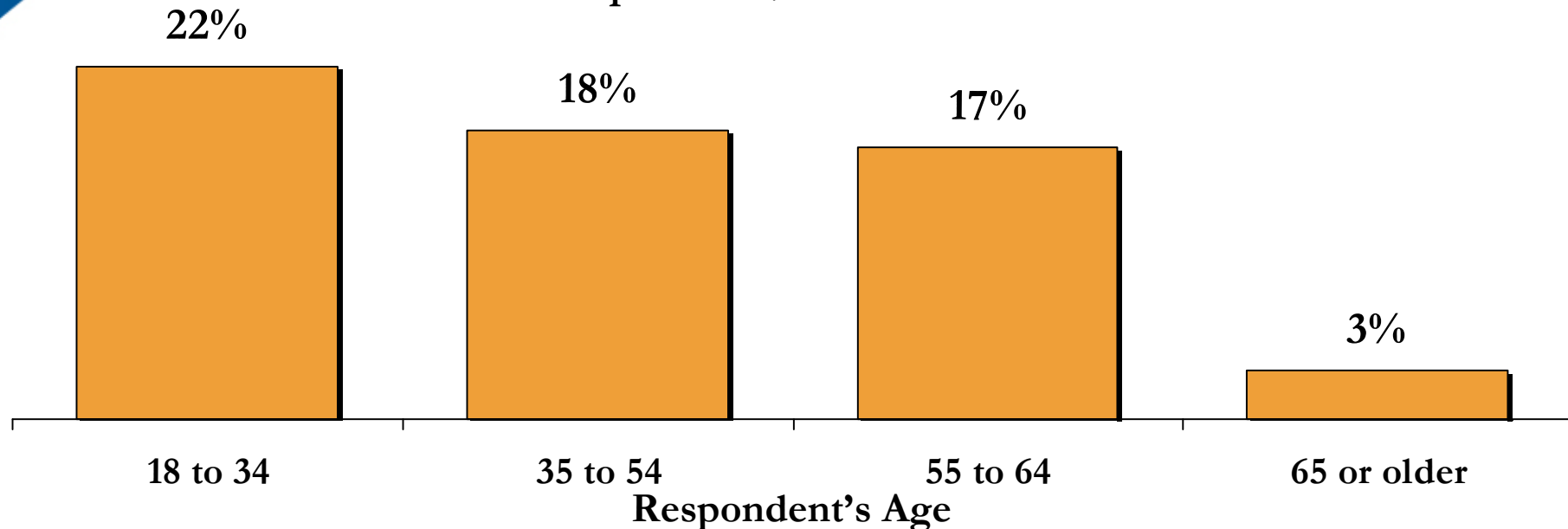
Q: Do you make or receive home telephone calls through your Internet connection?

(n=733 OH residents with home broadband service)

2009 © Connect Ohio®

Likely to Pay an Extra \$10 Per Month to Double Broadband Speeds

Percent of Ohio broadband subscribers who would be likely to upgrade their speed for \$10 more a month





Statewide Average: 18% of Ohio broadband subscribers would be likely to pay \$10 more a month for broadband speeds that are twice as fast as their current service.

Q: Would you be likely to subscribe to a broadband service that was twice as fast as your current connection speed for an additional ten dollars per month above what you are paying now?
(n=733 OH residents with broadband service at home)
2009 © Connect Ohio®

Why Ohio Residents Subscribe to Broadband

Percent of Ohio residents who subscribe to broadband for the following reasons

Percentage is significantly* <i>higher</i> than the state average: 	18 to 34	35 to 54	55 to 64	65 or older
Percentage is significantly* <i>lower</i> than the state average: 				
Realized broadband was worth the extra money	37%	43%	40%	41%
Broadband became available in my area	24%	34%	37%	30%
Got a computer for the home	29%	36%	43%	42%
Broadband costs have gone down	32%	40%	47%	42%
I needed to conduct business online	24%	24%	21%	15%
I heard about the benefits of broadband	19%	24%	29%	23%
Friends or family convinced me	16%	15%	16%	26%

*Significance measured at a 95% confidence level

Q: Which of the following contributed to your decision to subscribe to broadband service?

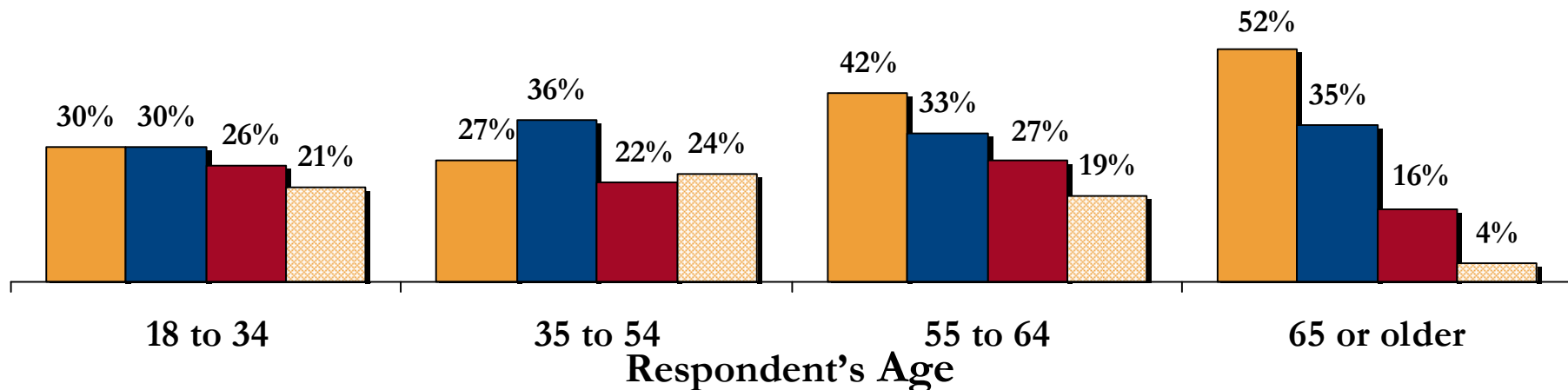
(n=733 OH residents with broadband service at home)

2009 © Connect Ohio[®]

Top Barriers to Broadband Adoption

Percent of Ohio residents who choose not to subscribe to broadband

- Don't need broadband or don't understand the benefit
- Don't own a computer
- Broadband is too expensive
- Broadband is not available where I live



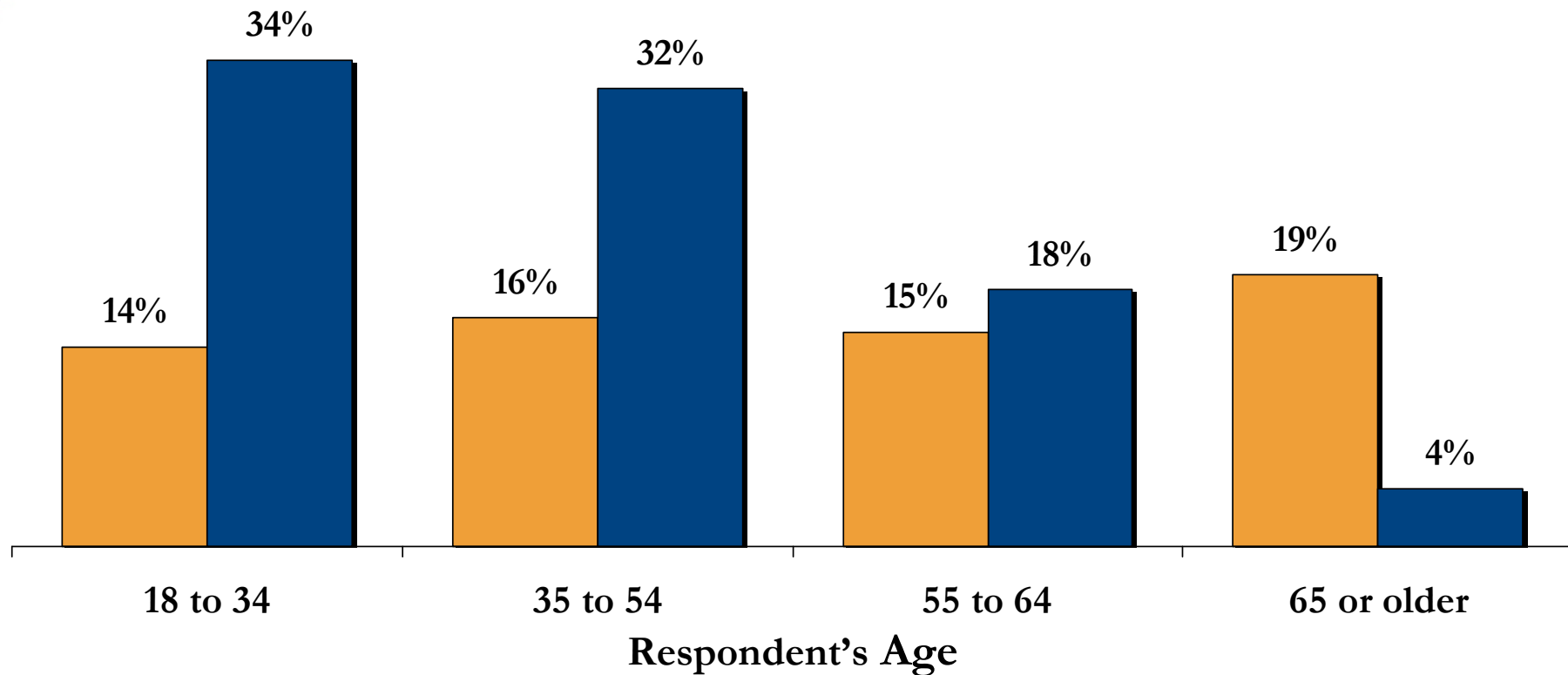
A perceived lack of need and the lack of a computer are the top barriers to broadband adoption.

Q: Why don't you subscribe to broadband at home?
 (n=467 OH residents with no home broadband service)
 2009 © Connect Ohio®

Ohio Residents and Telework

Among Ohio adults employed full- or part-time

■ Telework via the Internet
 ■ Do not telework, but would if employer allowed it



Q: Do you ever work from home related to your job or self employment? And

Q: Would you be interested in teleworking if your employer allowed it?

(n=688 OH residents employed full- or part-time)

80

2009 © Connect Ohio®

Do Not Copy Without Written Permission

Source: 2009 Connect Ohio® Statewide Residential Technology Assessment

www.connectohio.org

Residential Technology Assessment by Gender

Ohio Residents With a Computer at Home

Percent of Ohio residents who have a computer at home

82%

77%



Male

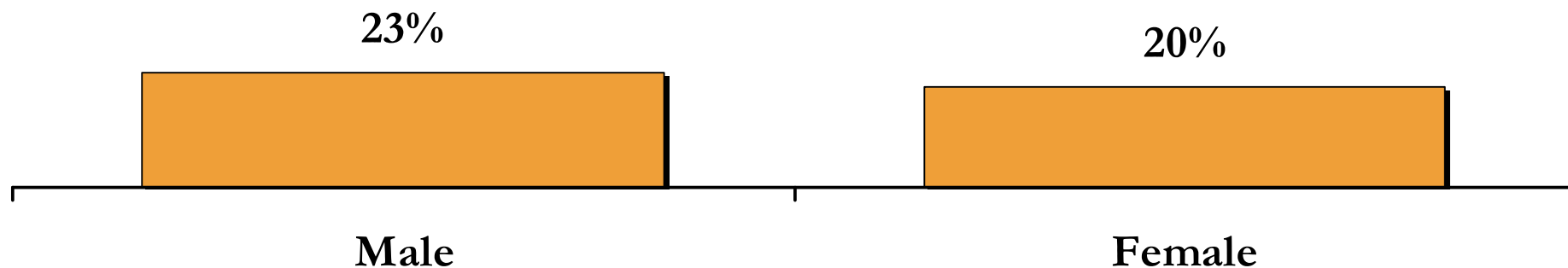


Female

Statewide Average: 79% of Ohio residents report having a personal computer at home.

Computer Purchases in the Last Year

Percent of computer owners who have purchased a new home computer
within the last year

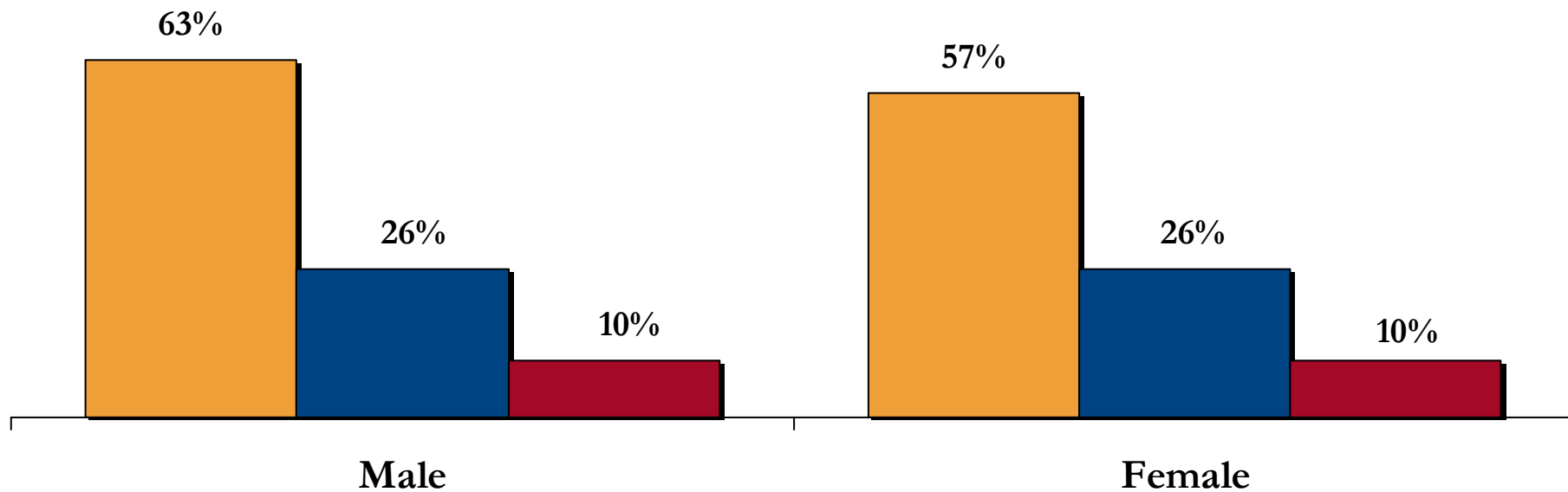


Statewide Average: 21% of Ohio adults report purchasing a new computer last year.

Barriers to Computer Ownership

Among Ohio residents who do not own a home computer

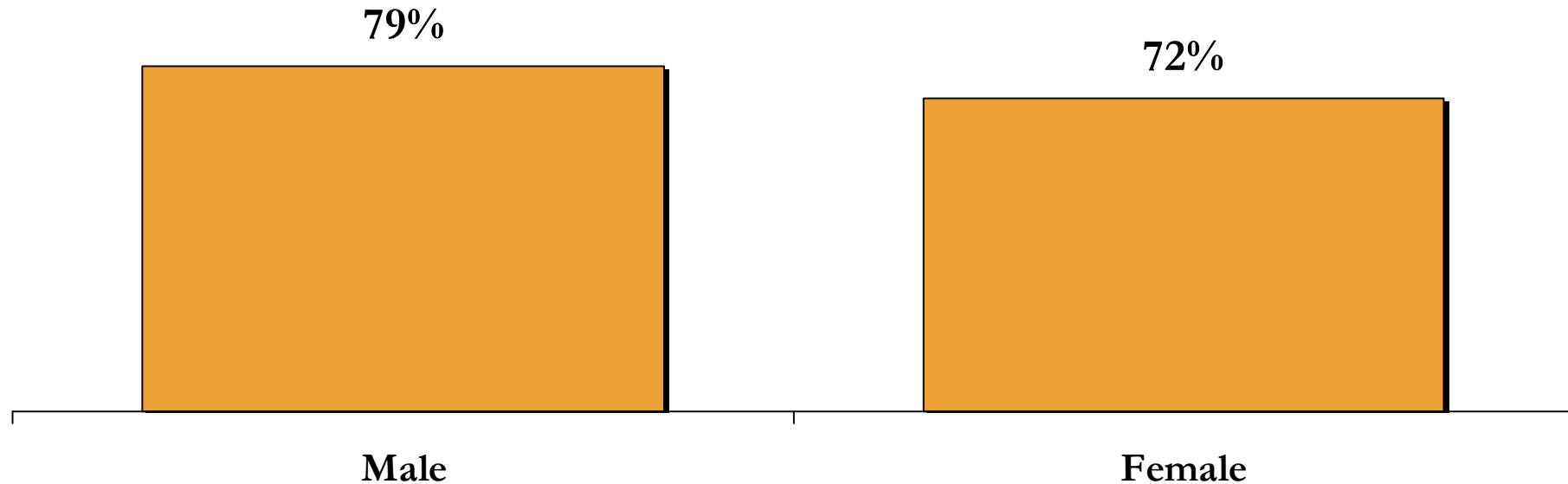
■ Don't need a computer
 ■ Too expensive
 ■ Use a computer at a different location



Q: Why don't you have a computer at home?
 (n=258 OH residents with no computer in their household)
 2009 © Connect Ohio®

Ohio Residents With an Internet Connection at Home (Either Dial-Up or Broadband)

Percent of Ohio residents who access the Internet from home

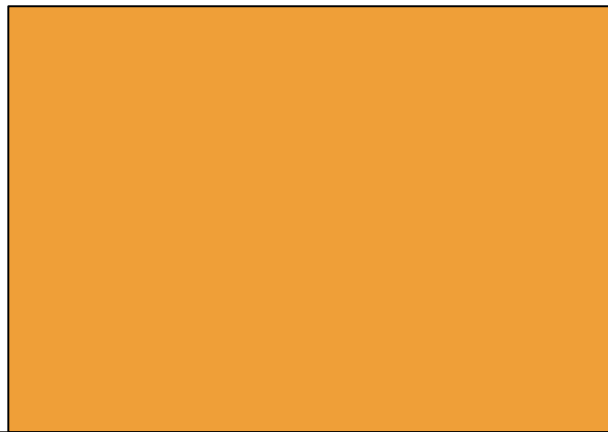


Statewide Average: 75% of Ohio residents report having an Internet connection at home (dial-up or broadband).

Ohio Residents Who Access the Internet (Dial-Up or Broadband) From Home or Some Other Place

Percent of Ohio residents who access the Internet from home or some other place

84%



Male

80%

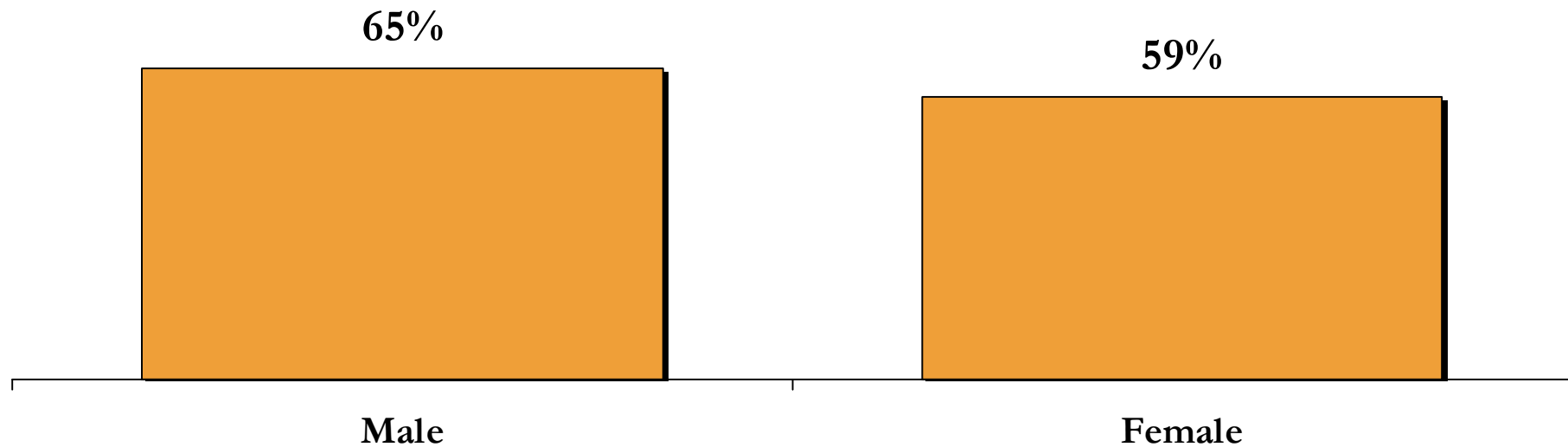


Female

Statewide Average: 82% of Ohio residents report using the Internet at home or someplace else.

Ohio Residents With Home Broadband Service

Percent of all Ohio residents who access broadband from home



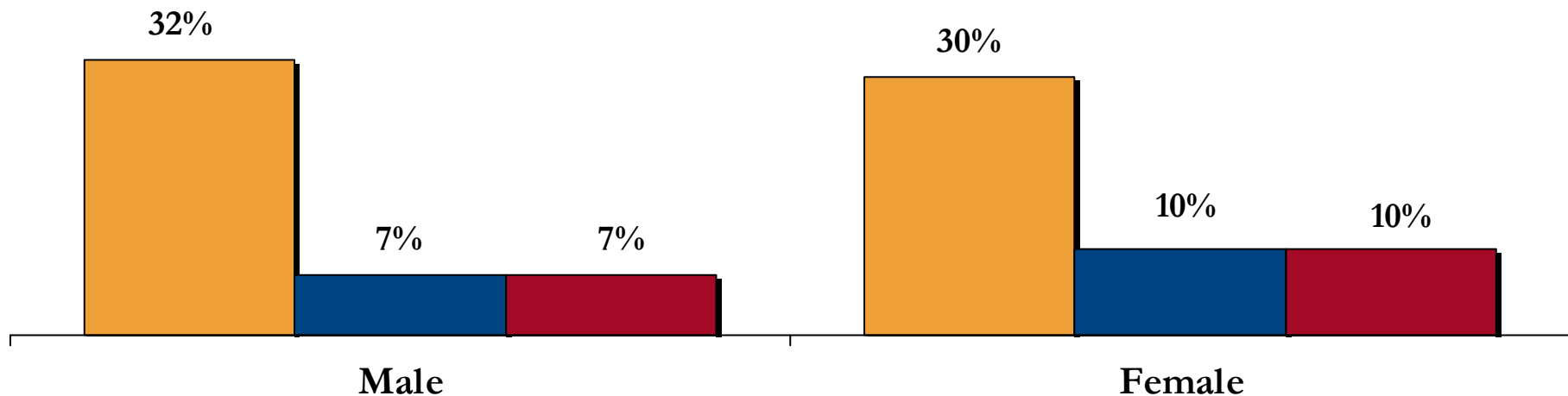
Statewide Average: 62% of all Ohio residents have home broadband service.

Q: Which of the following describe the type of Internet service you have at home?
(n=1,200 OH residents)
2009 © Connect Ohio[®]

Most Popular Places for Ohio Residents to Access the Internet

Percent of all Ohio residents who access the Internet at the following locales



■ At work
 ■ At someone else's home
 ■ At the library



Q: At what locations do you have access to the Internet?
 (n=1,200 OH residents)
 2009 © Connect Ohio®

Searching for Information Online

Percent of Ohio Internet users who search for the following types of information online

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Male	Female
Product or service information	63%	63%
Health or medical information	46%	53%
Information about events in your community	42%	45%
Research for schoolwork	33%	40%
Information about government services	39%	34%
Jobs or employment	33%	33%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of information have you used the internet to look for online?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Communicating Online

Percent of Ohio Internet users who communicate with others in the following ways

	 Percentage is significantly* <i>higher</i> than the state average:	 Percentage is significantly* <i>lower</i> than the state average:	Male	Female
E-mail			83%	86%
Instant messages			25%	25%
Posting content to a website			20%	20%
Chatting in chat rooms			9%	5%
Posting content to a blog			9%	10%
Social or professional networking sites such as Facebook			32%	39%
Microblogs such as Twitter			4%	8%



*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following ways of communicating with others have you used?
(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Interacting Online

Percent of Ohio Internet users who interact with the following individuals or organizations

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Male	Female
Friends or family	71%	79%
Companies with which you do business	43%	40%
Co-workers	40%	39%
Health insurance company	23%	25%
Teachers	22%	25%
Ohio state government	25%	18%
Doctors or healthcare professionals	18%	22%
Local government	17%	15%
Elected officials	15%	12%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of individuals or organizations have you interacted with online, by visiting a website or communicating online to obtain information?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Online Transactions

Percent of Ohio Internet users who conduct the following transactions online

		Male	Female
Percentage is significantly* <i>higher</i> than the state average:			
Percentage is significantly* <i>lower</i> than the state average:			
Purchasing a product or service online		51%	53%
Booking travel arrangements		29%	27%
Paying bills		49%	53%
Online banking		48%	48%
Online transactions with government		30%	27%
Selling a product or service online		13%	11%
Buying, selling, or trading investments		11%	9%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of transactions have you completed online?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Online Activities

Percent of Ohio Internet users who conduct the following activities online

Percentage is significantly* <i>higher</i> than the state average: 	Male	Female
Percentage is significantly* <i>lower</i> than the state average: 		
Using a search engine	69%	69%
Sending or receiving photos	45%	49%
Reading newspapers or other news sources	60%	58%
Playing games online	35%	39%
Downloading music	31%	30%
Watching videos, movies, or TV shows online	34%	31%
Working from home	30%	25%
Reading blogs	22%	23%
Taking online classes	7%	10%



*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following activities have you conducted online?
(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Barriers to Internet Adoption

Percent of Ohio residents who have no home Internet service for the following reasons

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Male	Female
I don't own a computer	59%	48%
I don't need the Internet	34%	43%
Too expensive	20%	23%
I can get Internet access somewhere else	8%	13%
Broadband isn't available, and I don't want dial-up	5%	8%
Concerns about fraud or identity theft	12%	8%

The lack of a home computer is the top barrier to Internet adoption among both men and women.

*Significance measured at a 95% confidence level



Q: Why don't you subscribe to the Internet at home?

(n=300 OH residents with no Internet service in their household)

2009 © Connect Ohio®

Internet Victimization

Percent of Ohio Internet users who have been victims of the following

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Male	Female
Spam or junk e-mail	71%	75%
Computer viruses or spyware	49%	43%
Credit card fraud	8%	8%
Identity theft	4%	6%
None of the above	19%	21%

*significance measured at a 95% confidence level

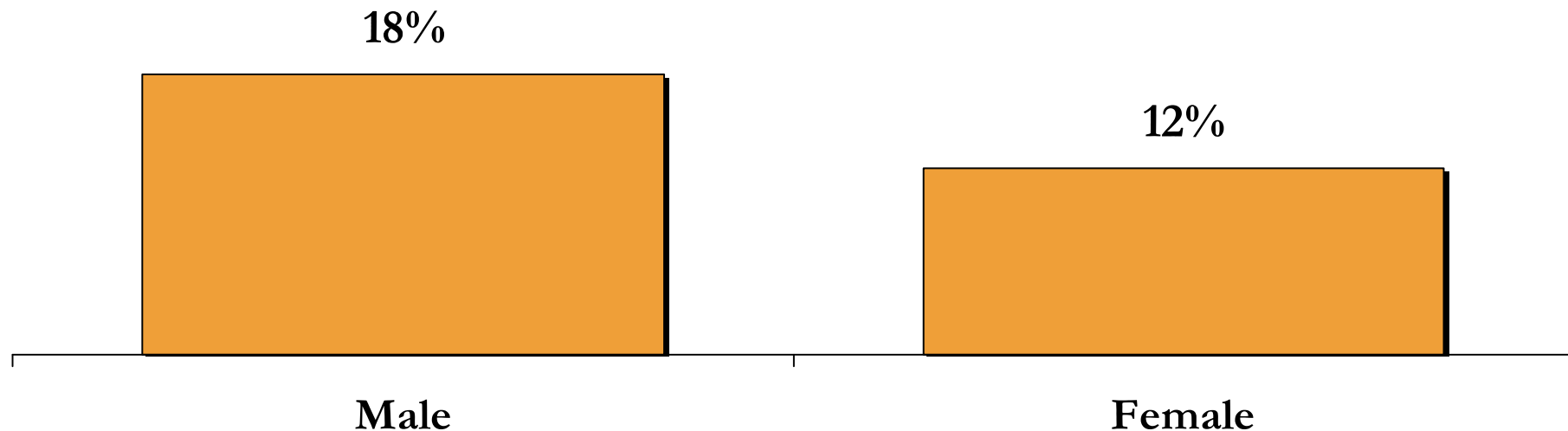
Q: Have you ever been a victim to any of the following [issues] through the Internet?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Home Telephone Calls Through a Broadband Connection (VoIP)

Among Ohio residents with home broadband service



Statewide Average: 15% of Ohio residents with home broadband service say they make or receive home telephone calls through their broadband connection (VoIP).

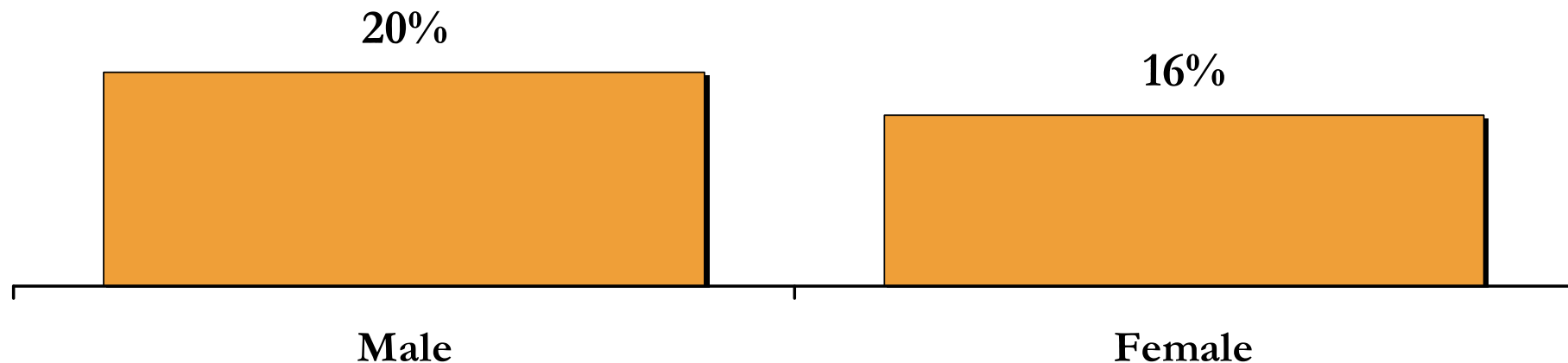
Q: Do you make or receive home telephone calls through your Internet connection?

(n=733 OH residents with home broadband service)

2009 © Connect Ohio[®]

Likely to Pay an Extra \$10 Per Month to Double Broadband Speeds

Percent of Ohio broadband subscribers who would be likely to upgrade their speed for \$10 more a month





Statewide Average: 18% of Ohio broadband subscribers would be likely to pay \$10 more a month for broadband speeds that are twice as fast as their current service.

Q: Would you be likely to subscribe to a broadband service that was twice as fast as your current connection speed for an additional ten dollars per month above what you are paying now?
(n=733 OH residents with broadband service at home)
2009 © Connect Ohio[®]

Why Ohio Residents Subscribe to Broadband

Percent of Ohio residents who subscribe to broadband for the following reasons

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Male	Female
Realized broadband was worth the extra money	40%	42%
Broadband became available in my area	29%	32%
Got a computer for the home	36%	35%
Broadband costs have gone down	38%	39%
I needed to conduct business online	23%	23%
I heard about the benefits of broadband	22%	23%
Friends or family convinced me	16%	17%

*Significance measured at a 95% confidence level

Q: Which of the following contributed to your decision to subscribe to broadband service?

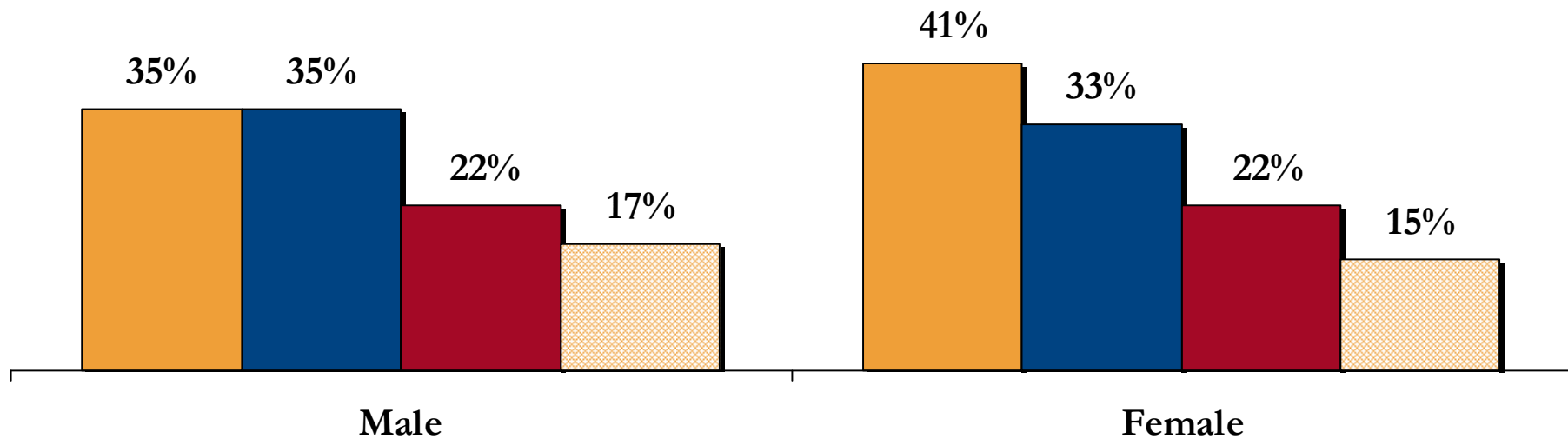
(n=733 OH residents with broadband service at home)

2009 © Connect Ohio[®]

Top Barriers to Broadband Adoption

Percent of Ohio residents who choose not to subscribe to broadband

- Don't need broadband or don't understand the benefit
- Don't own a computer
- Broadband is too expensive
- Broadband is not available where I live

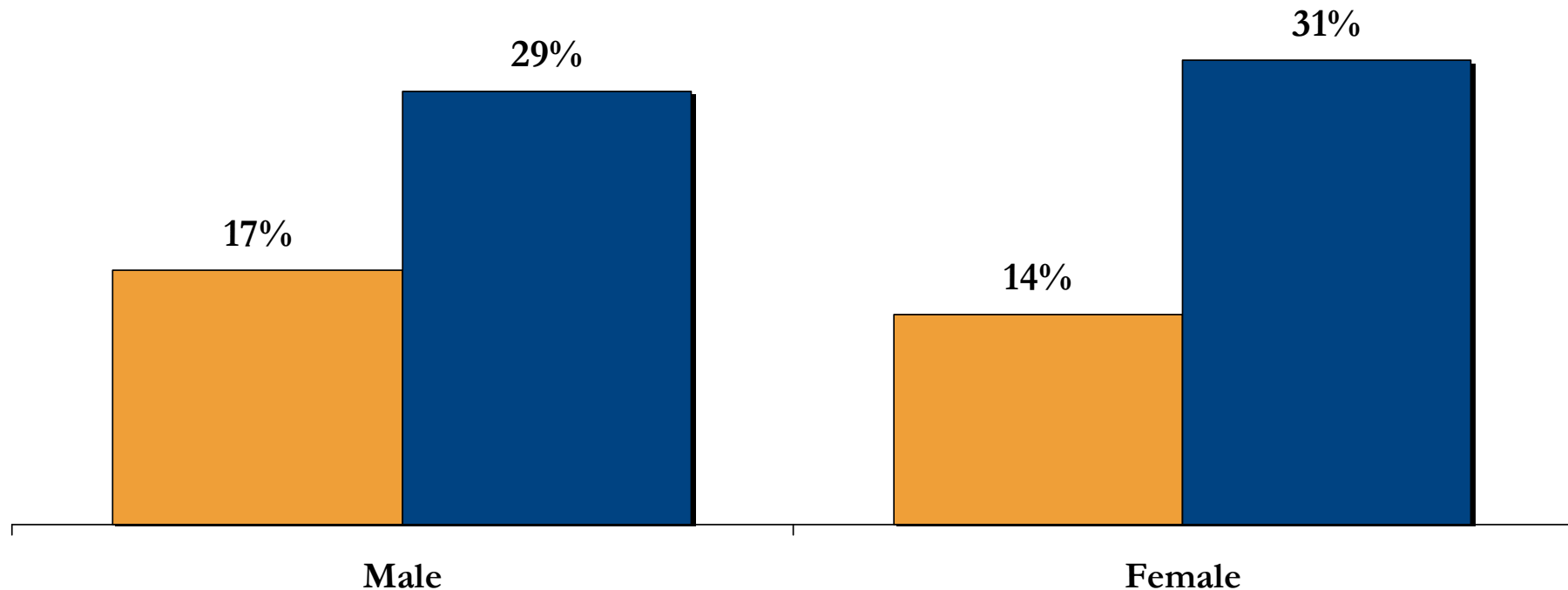


Lack of a computer and a perceived lack of need for home broadband service are the top barriers to broadband adoption among both men and women.

Ohio Residents and Telework

Among Ohio adults employed full- or part-time

■ Telework via the Internet ■ Do not telework, but would if employer allowed it



Q: Do you ever work from home related to your job or self employment? And

Q: Would you be interested in teleworking if your employer allowed it?

(n=688 OH residents employed full- or part-time)

100

2009 © Connect Ohio®

Do Not Copy Without Written Permission

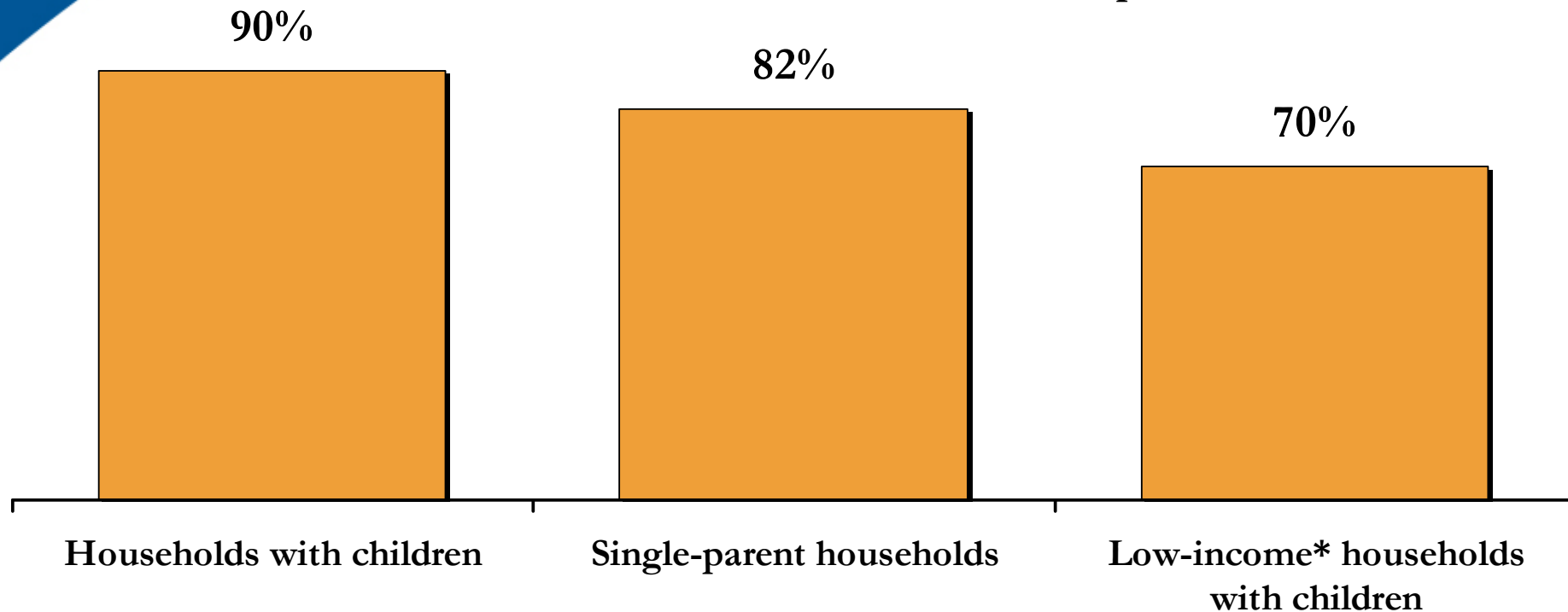
Source: 2009 Connect Ohio® Statewide Residential Technology Assessment

www.connectohio.org

Residential Technology Assessment Among Households With Children

Ohio Residents With a Computer at Home

Percent of Ohio residents who have a computer at home



Statewide Average: 79% of Ohio residents report having a personal computer at home.

*Low-income=household income less than \$25,000

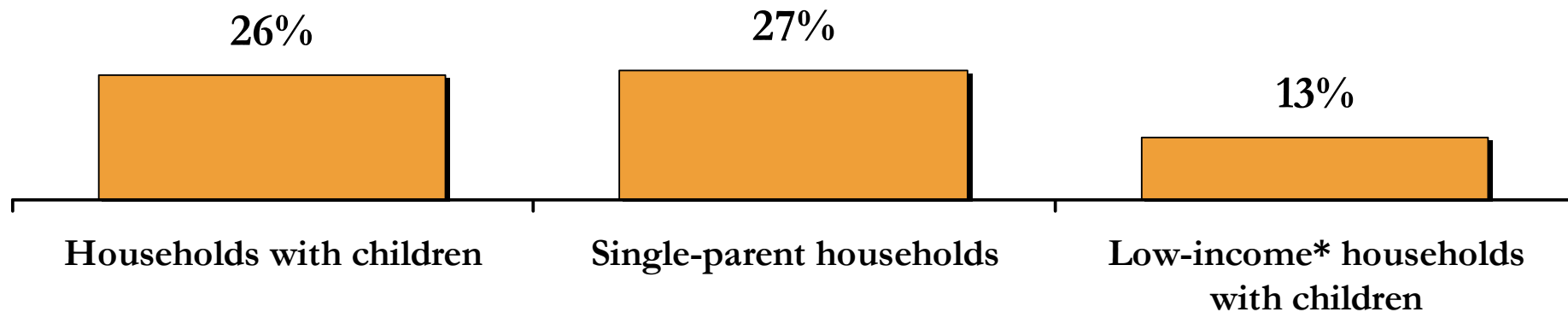
Q: Do you have a computer at home?
(n=439 OH residents with children at home)
2009 © Connect Ohio[®]

102
Do Not Copy Without Written Permission

Source: 2009 Connect Ohio[®] Statewide Residential Technology Assessment
www.connectohio.org

Computer Purchases in the Last Year

Percent of computer owners who have purchased a new home computer
within the last year



Statewide Average: 21% of Ohio adults report purchasing a new computer last year.

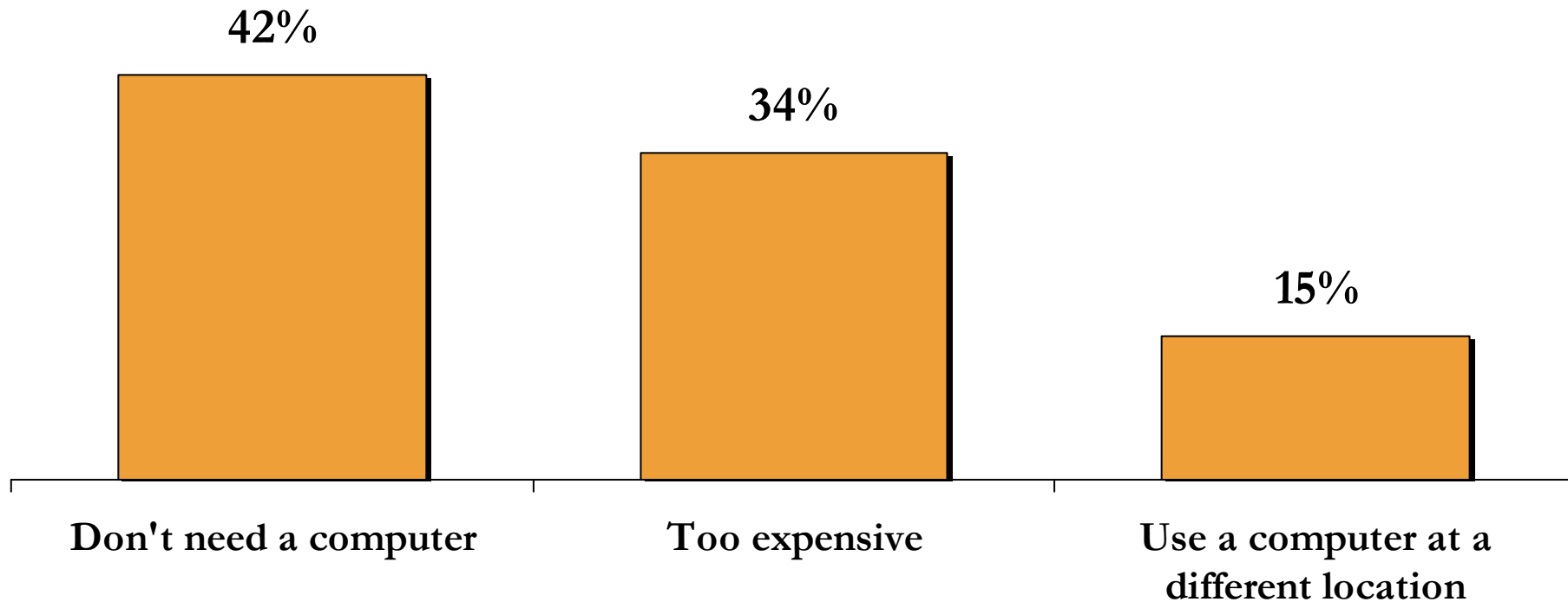
*Low-income=household income less than \$25,000

Q: When was the last time you purchased a home computer?
(n=439 OH residents with children at home)

2009 © Connect Ohio[®]

Barriers to Computer Ownership

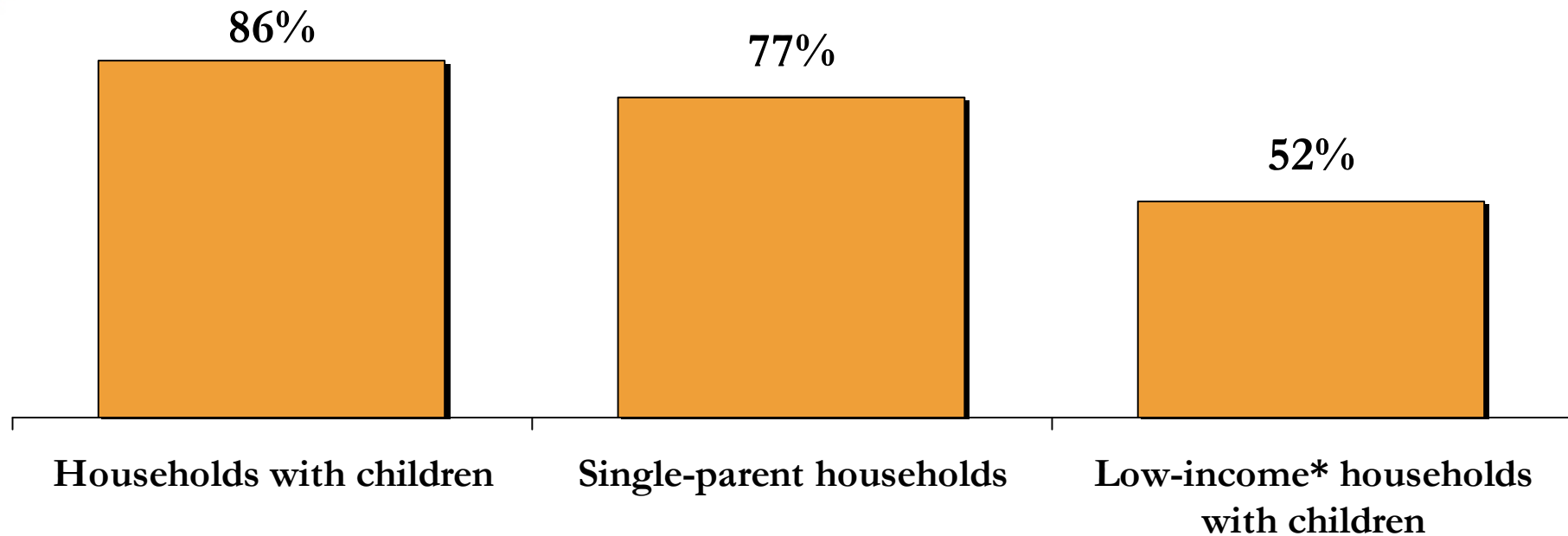
Among Ohio households with children who do not own a computer



Q: Why don't you have a computer at home?
(n=43 OH residents who have children at home
but who do not own a computer)
2009 © Connect Ohio[®]

Ohio Residents With an Internet Connection at Home (Either Dial-Up or Broadband)

Percent of Ohio residents who access the Internet from home



Statewide Average: 75% of Ohio residents report having an Internet connection at home (dial-up or broadband).

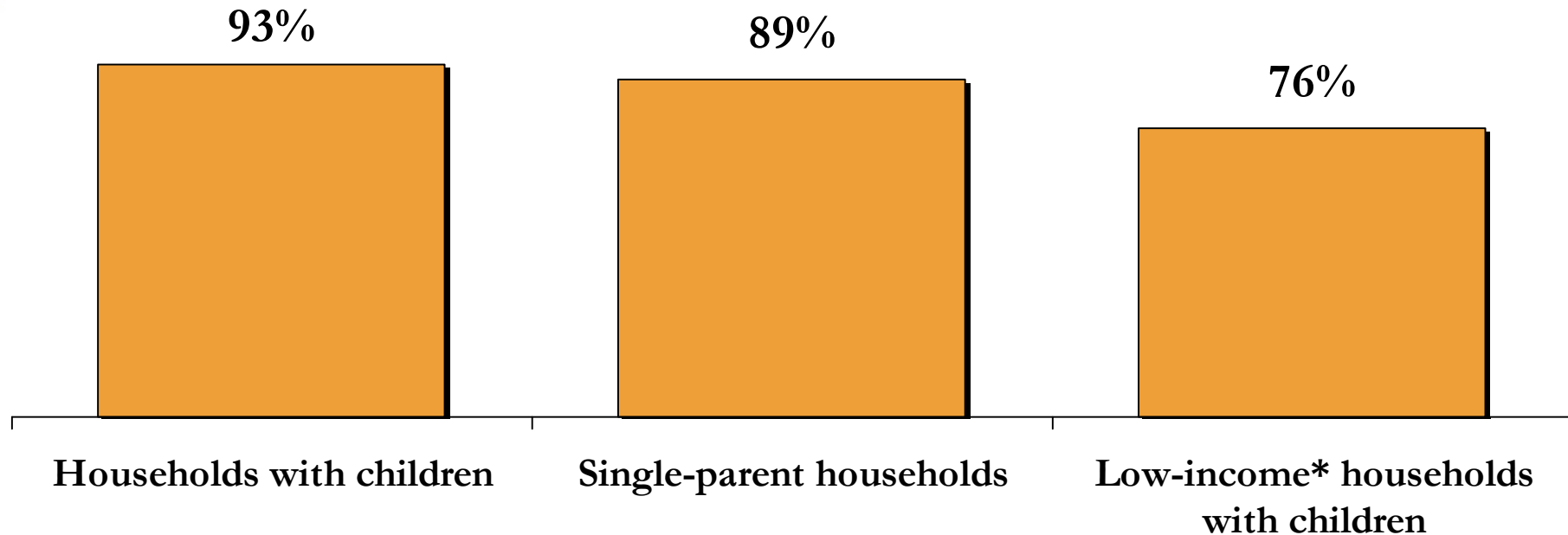
*Low-income=household income less than \$25,000

Q: Do you have an Internet connection at home?
(n=439 OH residents with children at home)

2009 © Connect Ohio[®]

Ohio Residents Who Access the Internet (Dial-Up or Broadband) From Home or Some Other Place

Percent of Ohio residents who access the Internet from home or some other place



Statewide Average: 82% of Ohio residents report using the Internet at home or someplace else.

*Low-income=household income less than \$25,000

Q: Do you use the Internet from any locations outside of your own home?
(n=439 OH residents with children at home)

2009 © Connect Ohio[®]

106

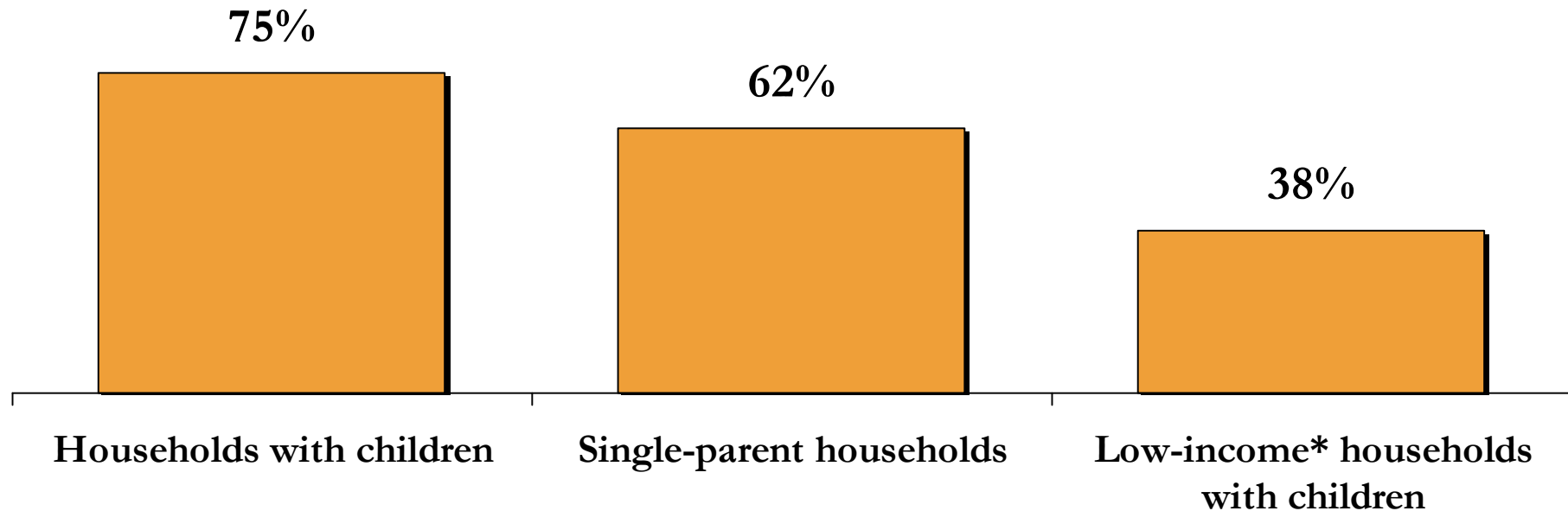
Do Not Copy Without Written Permission

Source: 2009 Connect Ohio[®] Statewide
Residential Technology Assessment

www.connectohio.org

Ohio Residents With Home Broadband Service

Percent of all Ohio residents who access broadband from home



Statewide Average: 62% of all Ohio residents have home broadband service.

*Low-income=annual household income less than \$25,000

Q: Which of the following describe the type of Internet service you have at home?

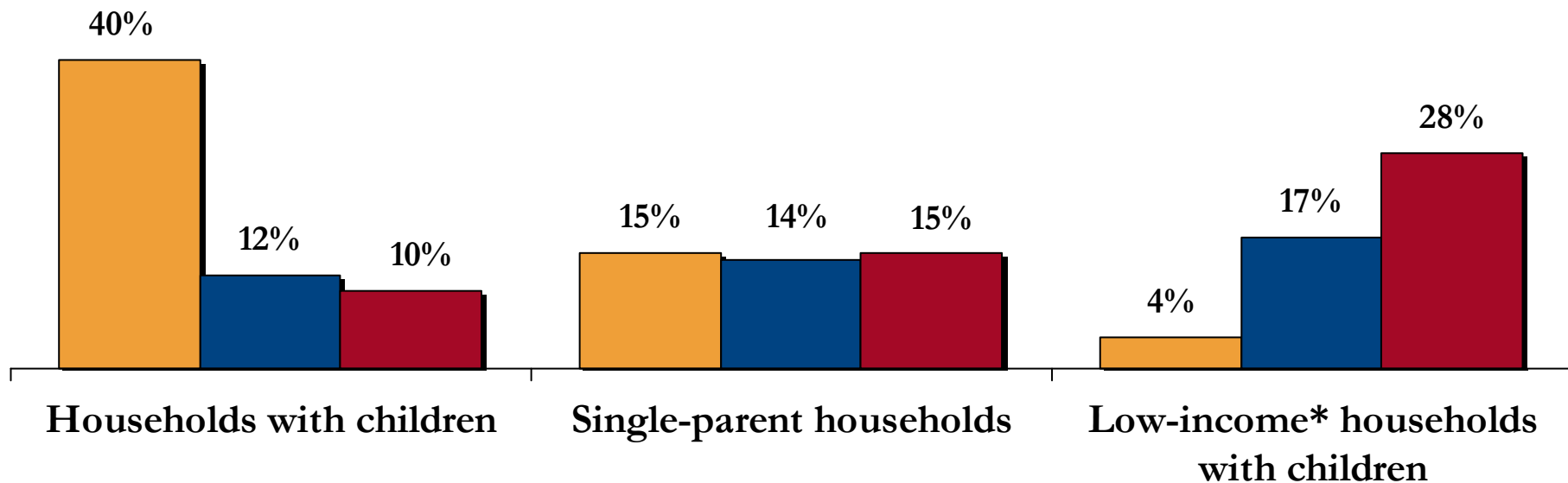
(n=439 OH residents with children at home)

2009 © Connect Ohio[®]

Most Popular Places for Ohio Residents to Access the Internet

Percent of all Ohio residents who access the Internet at the following locales

■ At work
 ■ At someone else's home
 ■ At the library





*Low-income=household income less than \$25,000

Q: At what locations do you have access to the Internet?
(n=439 OH residents with children at home)

2009 © Connect Ohio®

Searching for Information Online

Percent of Ohio Internet users who search for the following types of information online

Percentage is significantly** <i>higher</i> than the state average: 	Households with children	Single-parent households	Low-income* families with children
Percentage is significantly** <i>lower</i> than the state average: 			
Product or service information	64%	49%	33%
Health or medical information	53%	46%	35%
Information about events in your community	49%	44%	41%
Research for schoolwork	53%	62%	62%
Information about government	38%	32%	34%
Jobs or employment	41%	49%	54%

*Low-income=annual household income less than \$25,000

**significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of information have you used the internet to look for online?

(n=409 OH residents with children who use the Internet)

2009 © Connect Ohio®

Communicating Online

Percent of Ohio Internet users who communicate with others in the following ways

		Households with children	Single-parent households	Low-income* households with children
Percentage is significantly** higher than the state average:				
Percentage is significantly** lower than the state average:				
E-mail		86%	75%	69%
Instant messages		29%	37%	29%
Posting content to a website		22%	22%	16%
Chatting in chat rooms		7%	10%	12%
Posting content to a blog		11%	15%	10%
Social or professional networking sites such as Facebook		50%	68%	58%
Microblogs such as Twitter		9%	11%	9%

*Low-income=annual household income less than \$25,000

**significance measured at a 95% confidence level



Q: In the past 30 days, which of the following ways of communicating with others have you used?

(n=409 OH residents with children who use the Internet)

2009 © Connect Ohio®

Interacting Online

Percent of Ohio Internet users who interact with the following individuals or organizations

Percentage is significantly** <i>higher</i> than the state average: 	Households with children	Single-parent households	Low-income* households with children
Percentage is significantly** <i>lower</i> than the state average: 			
Friends or family	77%	75%	59%
Businesses	44%	33%	13%
Coworkers	44%	40%	17%
Health insurance company	25%	16%	16%
Teachers	36%	39%	21%
Ohio state government	21%	16%	17%
Doctors or healthcare professionals	23%	28%	18%
Local government	16%	12%	7%
Elected officials	12%	14%	9%

*Low-income=annual household income less than \$25,000

**significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of individuals or organizations have you interacted with online, by visiting a website or communicating online to obtain information?

(n=409 OH residents with children who use the Internet)

2009 © Connect Ohio®

Online Transactions

Percent of Ohio Internet users who conduct the following transactions online

Percentage is significantly** <i>higher</i> than the state average:  Percentage is significantly** <i>lower</i> than the state average: 	Households with children	Single-parent households	Low-income* households with children
Purchasing a product or service online	56%	42%	21%
Booking travel arrangements	27%	21%	7%
Paying bills	60%	47%	33%
Online banking	56%	41%	25%
Online transactions with government	31%	25%	12%
Selling a product or service online	15%	7%	4%
Buying, selling, or trading investments	11%	11%	5%

*Low-income=annual household income less than \$25,000

**significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of transactions have you completed online?

(n=409 OH residents with children who use the Internet)

2009 © Connect Ohio®

Online Activities

Percent of Ohio Internet users who conduct the following activities online

Percentage is significantly** <i>higher</i> than the state average:  Percentage is significantly** <i>lower</i> than the state average: 	Households with children	Single-parent households	Low-income* households with children
Using a search engine	75%	76%	73%
Sending or receiving photos	53%	51%	38%
Reading newspapers or other news sources	64%	59%	44%
Playing games online	45%	57%	54%
Downloading music	43%	53%	52%
Watching videos, movies, or TV shows online	42%	44%	43%
Working from home	31%	19%	15%
Reading blogs	27%	26%	30%
Taking online classes	10%	21%	18%

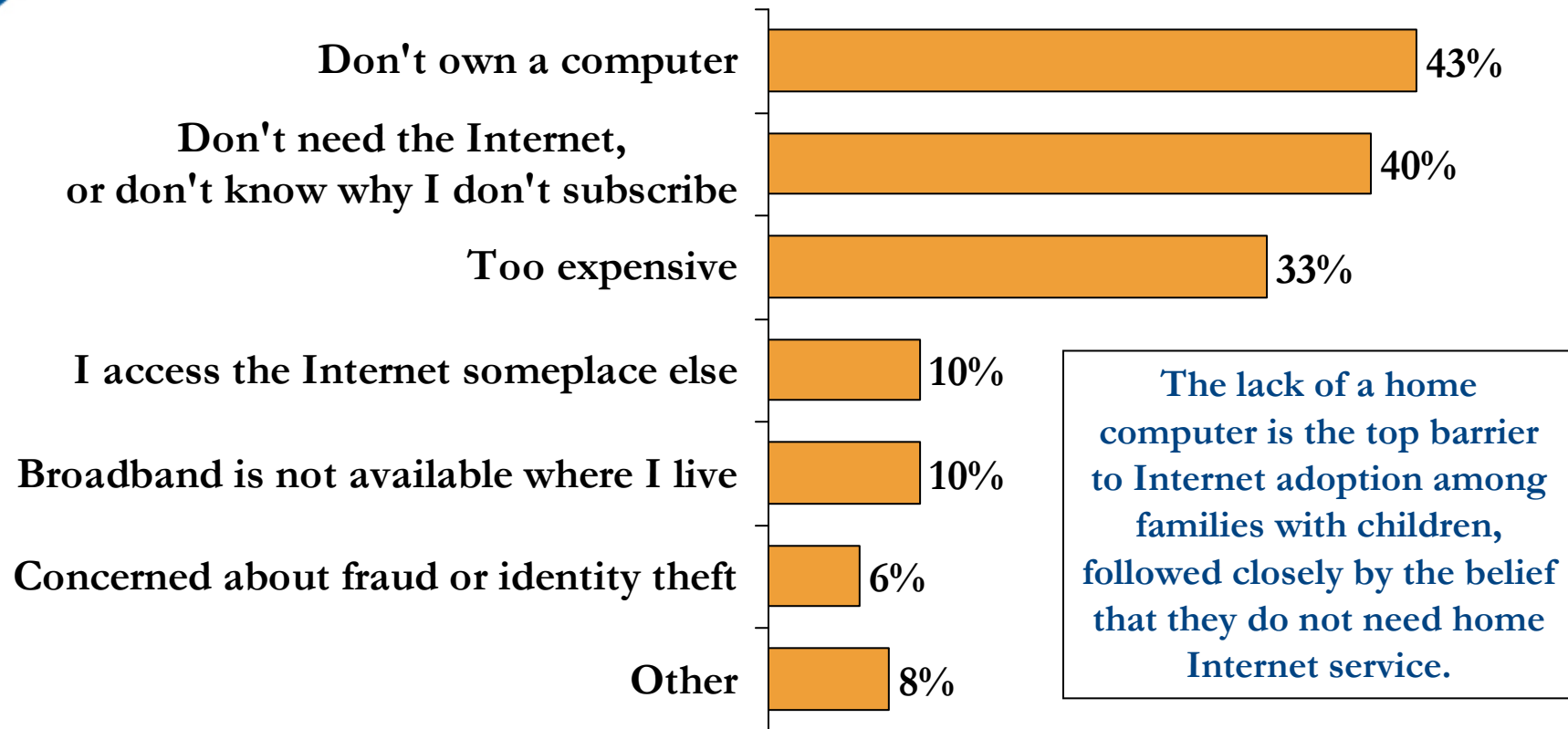
*Low-income=annual household income less than \$25,000

**significance measured at a 95% confidence level

Q: In the past 30 days, which of the following activities have you conducted online?
(n=409 OH residents with children who use the Internet)

Barriers to Internet Adoption




Percent of Ohio residents with children at home who have no home Internet service for the following reasons



Q: Why don't you subscribe to the Internet at home?
 (n=57 OH residents with children at home, but without home Internet service)
 2009 © Connect Ohio®

Internet Victimization

Percent of Ohio Internet users who have been victims of the following

Percentage is significantly** <i>higher</i> than the state average:  Percentage is significantly** <i>lower</i> than the state average: 	Households with children	Single-parent households	Low-income* households with children
Spam or junk e-mail	77%	73%	 55%
Computer viruses or spyware	50%	41%	37%
Credit card fraud	10%	4%	8%
Identity theft	6%	2%	9%

*Low-income=annual household income less than \$25,000

**significance measured at a 95% confidence level

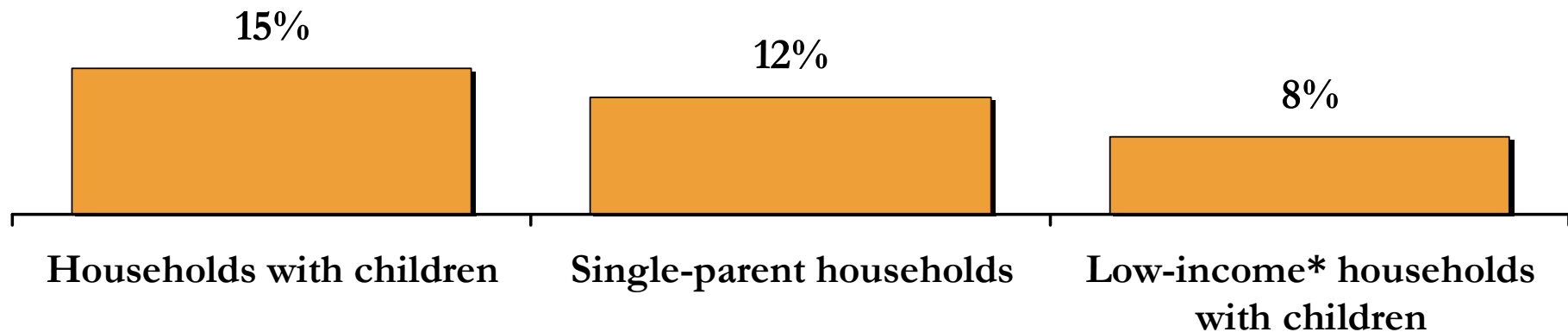
Q: Have you ever been a victim to any of the following [issues] through the Internet?

(n=409 OH residents with children who use the Internet)

2009 © Connect Ohio®

Home Telephone Calls Through a Broadband Connection (VoIP)

Among Ohio residents with home broadband service



Statewide Average: 15% of Ohio residents with home broadband service say they make or receive home telephone calls through their broadband connection (VoIP).

*Low-income=annual household income less than \$25,000

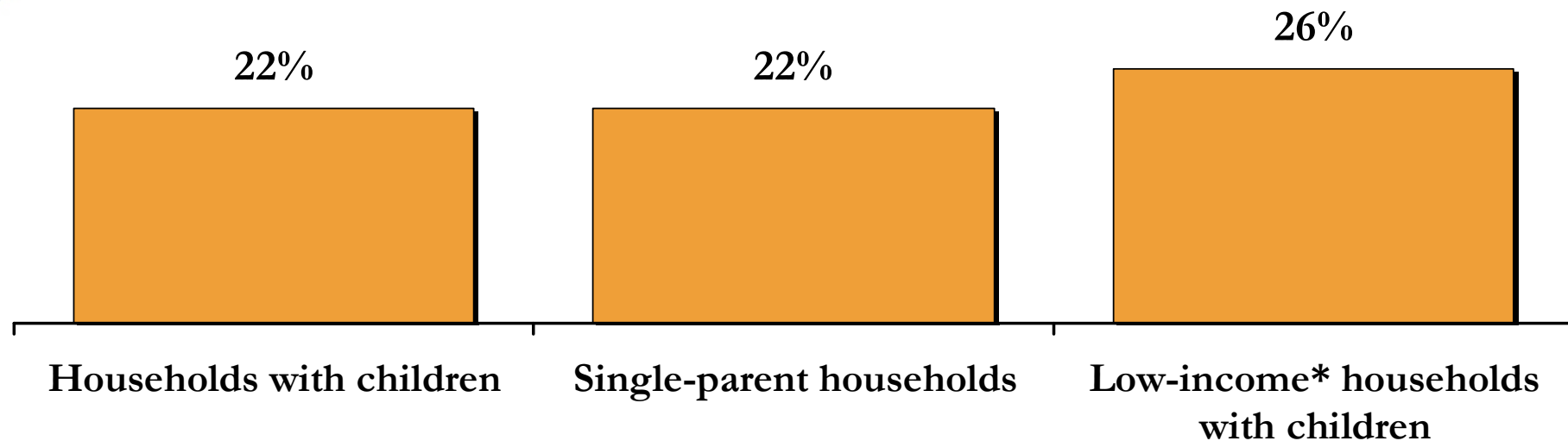
Q: Do you make or receive home telephone calls through your Internet connection?

(n=335 OH residents with children and who subscribe to home broadband service)

2009 © Connect Ohio®

Likely to Pay an Extra \$10 Per Month to Double Broadband Speeds

Percent of Ohio broadband subscribers who would be likely to upgrade their speed for \$10 more a month



Statewide Average: 18% of Ohio broadband subscribers would be likely to pay \$10 more a month for broadband speeds that are twice as fast as their current service.

*Low-income=annual household income less than \$25,000

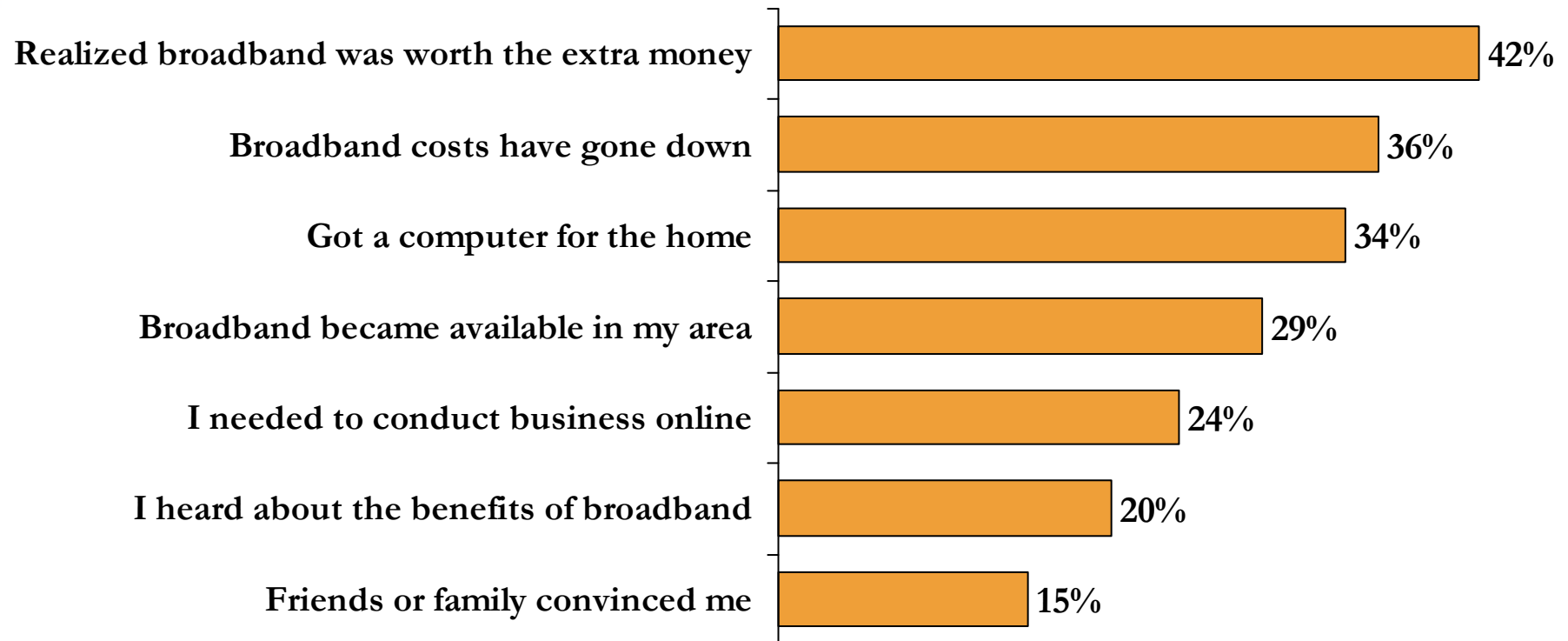
Q: Would you be likely to subscribe to a broadband service that was twice as fast as your current connection speed for an additional ten dollars per month above what you are paying now?

(n=335 OH residents with children at home and who subscribe to home broadband service)

2009 © Connect Ohio[®]

Why Ohio Residents Subscribe to Broadband

Percent of Ohio households with children
that subscribe to broadband for the following reasons



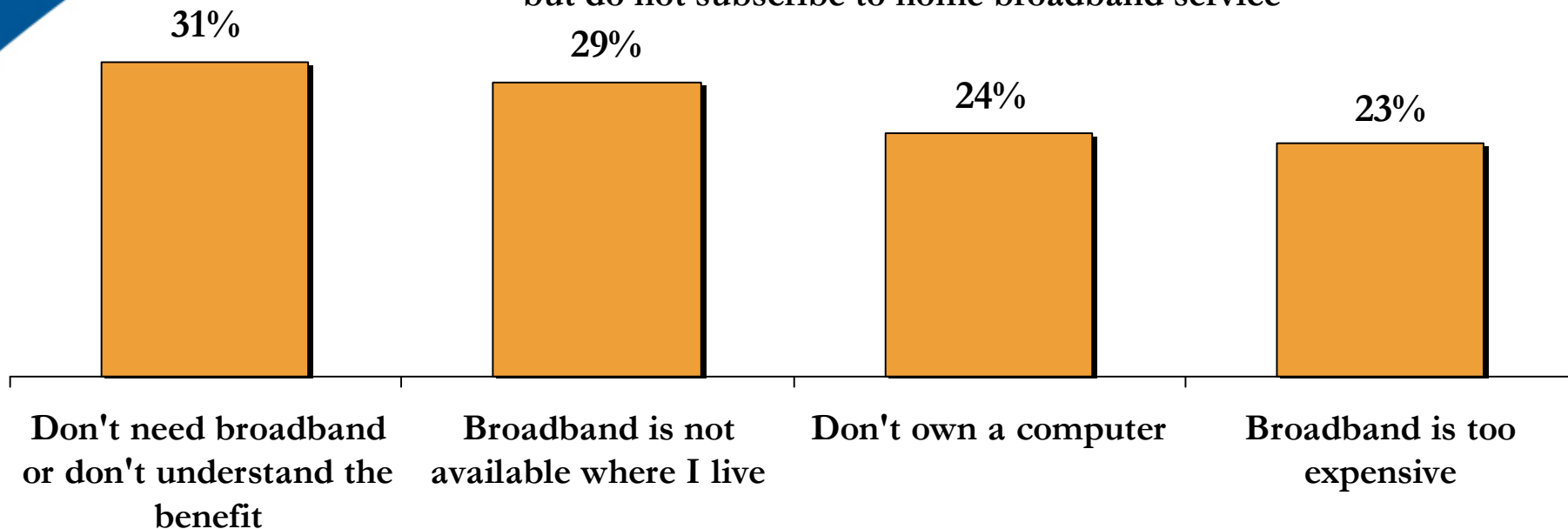
Q: Which of the following contributed to your decision to subscribe to broadband service?

(n=335 OH residents with children at home who subscribe to home broadband service)

2009 © Connect Ohio®

Top Barriers to Broadband Adoption

Percent of Ohio residents who have children living at home but do not subscribe to home broadband service

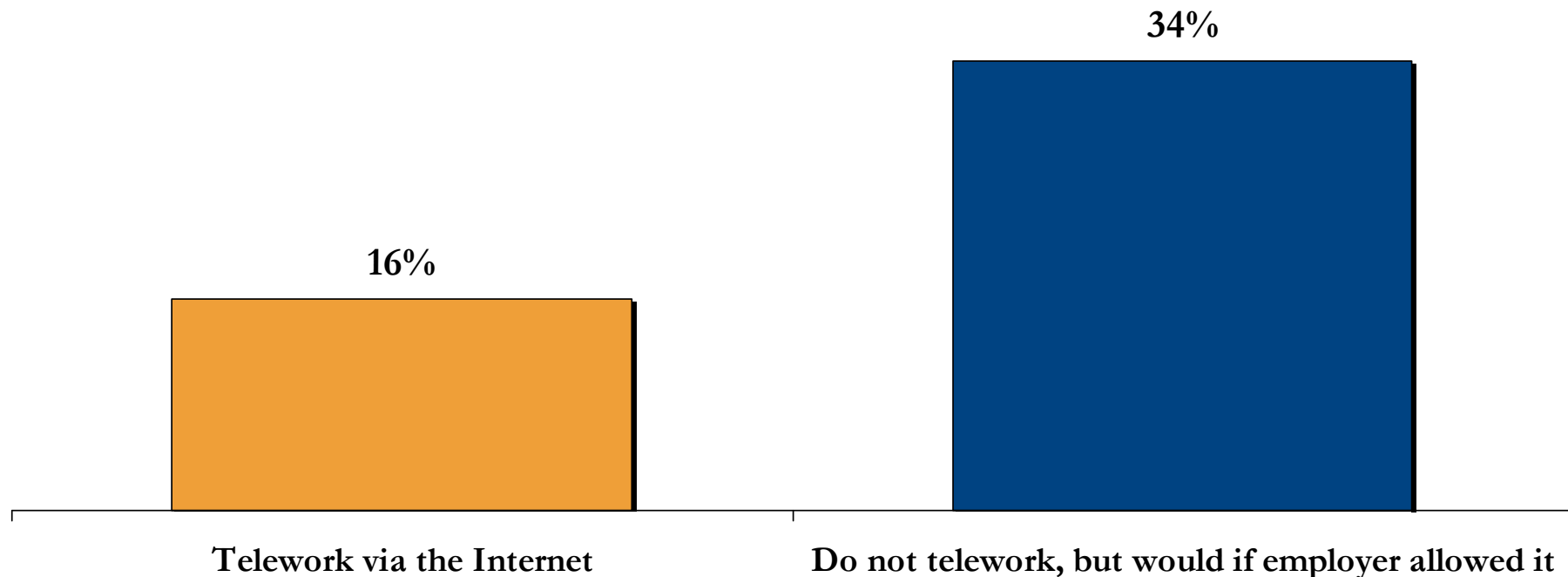


Among households with children, which are more likely than average to subscribe to home broadband service, the top barrier is the perceived lack of demand, followed closely by a perceived lack of available broadband service.

Q: Why don't you subscribe to broadband at home?
(n=104 OH residents with children at home but with no home broadband service)
2009 © Connect Ohio[®]

Ohio Residents and Telework

Among Ohio adults employed full- or part-time



Q: Do you ever work from home related to your job or self employment? And

Q: Would you be interested in teleworking if your employer allowed it?

(n=311 OH residents employed full- or part-time with children at home)

2009 © Connect Ohio[®]

120

Do Not Copy Without Written Permission

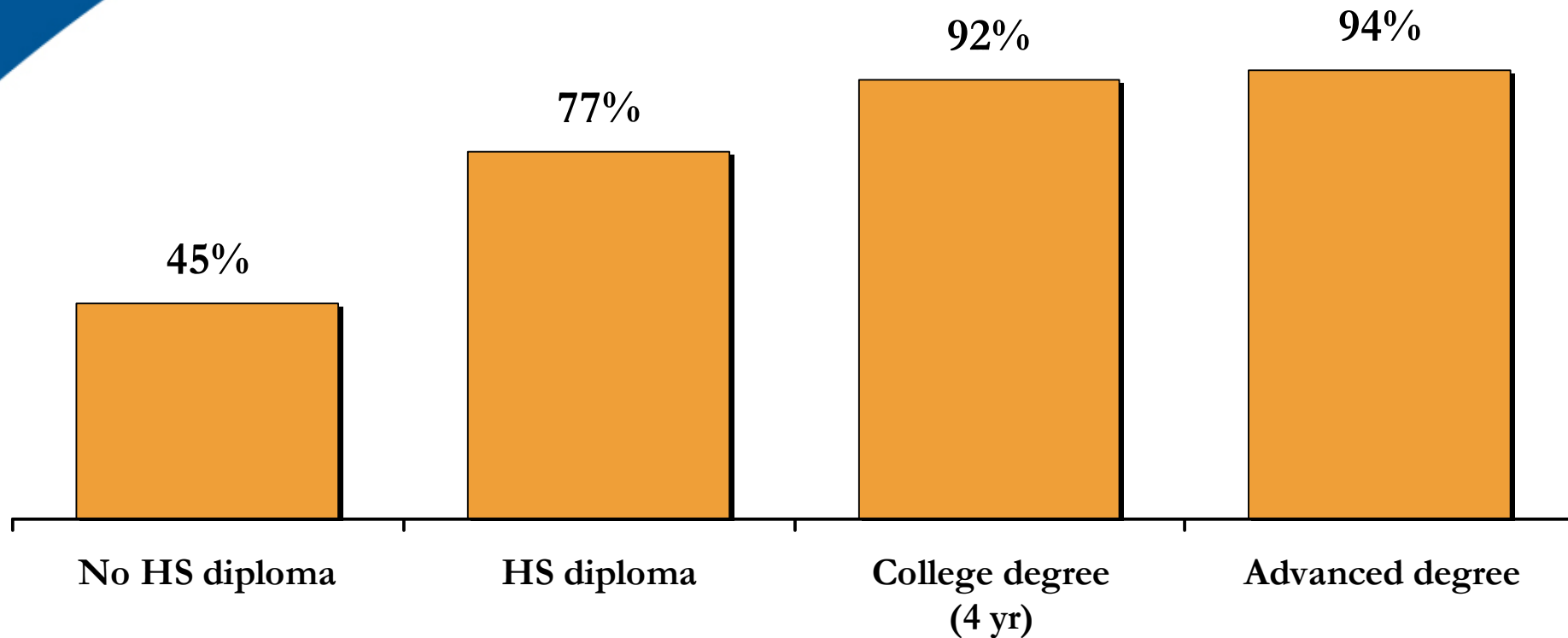
Source: 2009 Connect Ohio[®] Statewide Residential Technology Assessment

www.connectohio.org

Residential Technology Assessment by Highest Educational Attainment

Ohio Residents With a Computer at Home

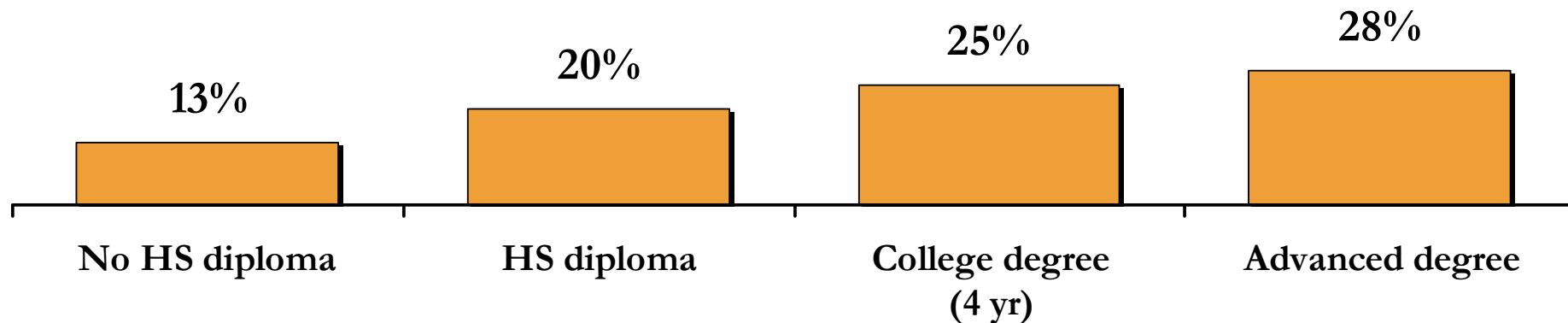
Percent of Ohio residents who have a computer at home



Statewide Average: 79% of Ohio residents report having a personal computer at home.

Computer Purchases in the Last Year

Percent of residents who have purchased a new home computer
within the last year

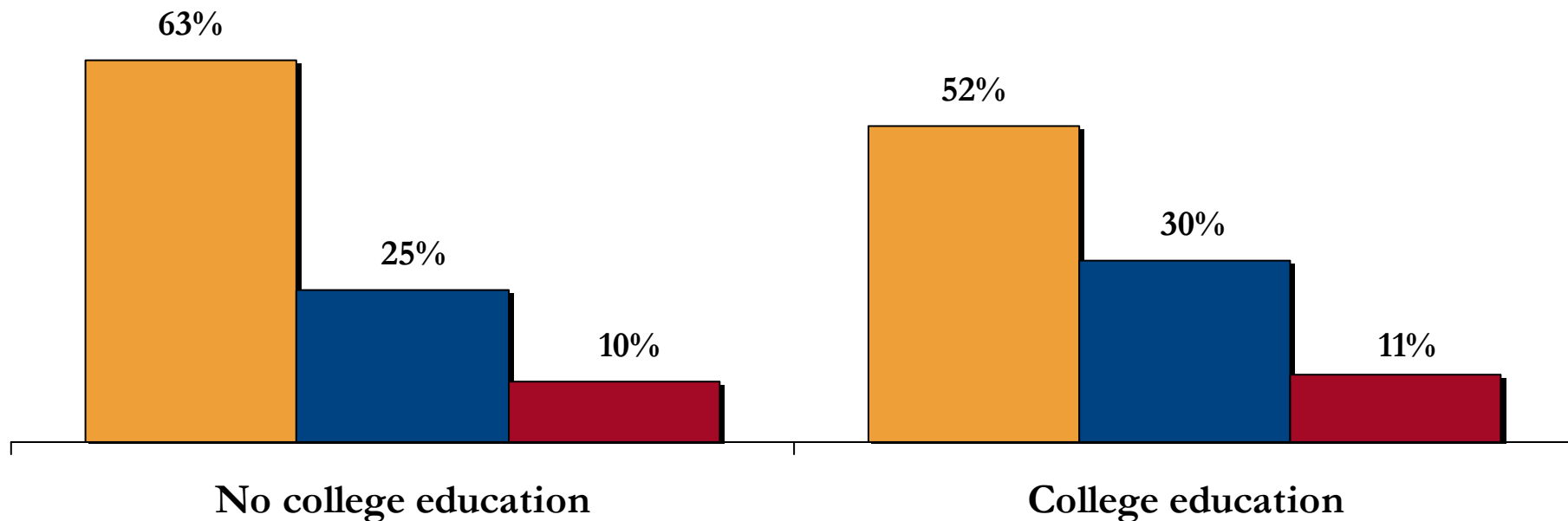


Statewide Average: 21% of Ohio adults report purchasing a new computer last year.

Barriers to Computer Ownership

Among Ohio residents who do not own a home computer

■ Don't need a computer ■ Too expensive ■ Use a computer at a different location



Q: Why don't you have a computer at home?
(n=258 OH residents with no computer in their household)
2009 © Connect Ohio®

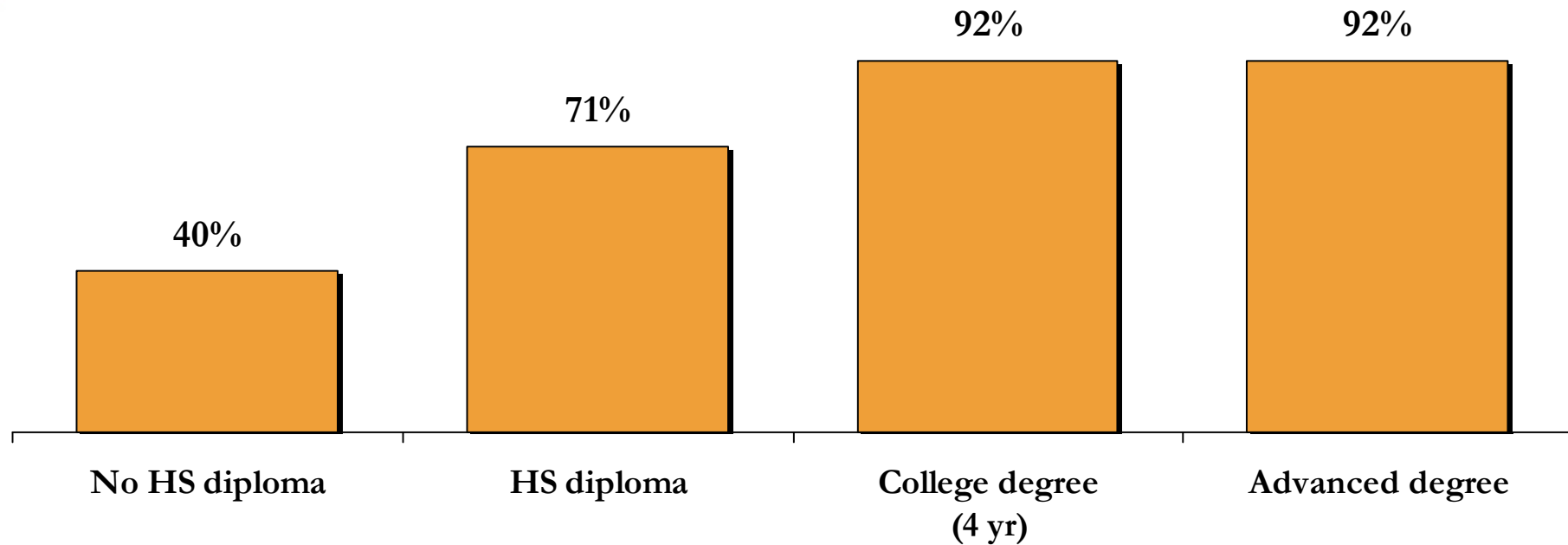
124

Do Not Copy Without Written Permission

Source: 2009 Connect Ohio® Statewide Residential Technology Assessment
www.connectohio.org

Ohio Residents With an Internet Connection at Home (Either Dial-Up or Broadband)

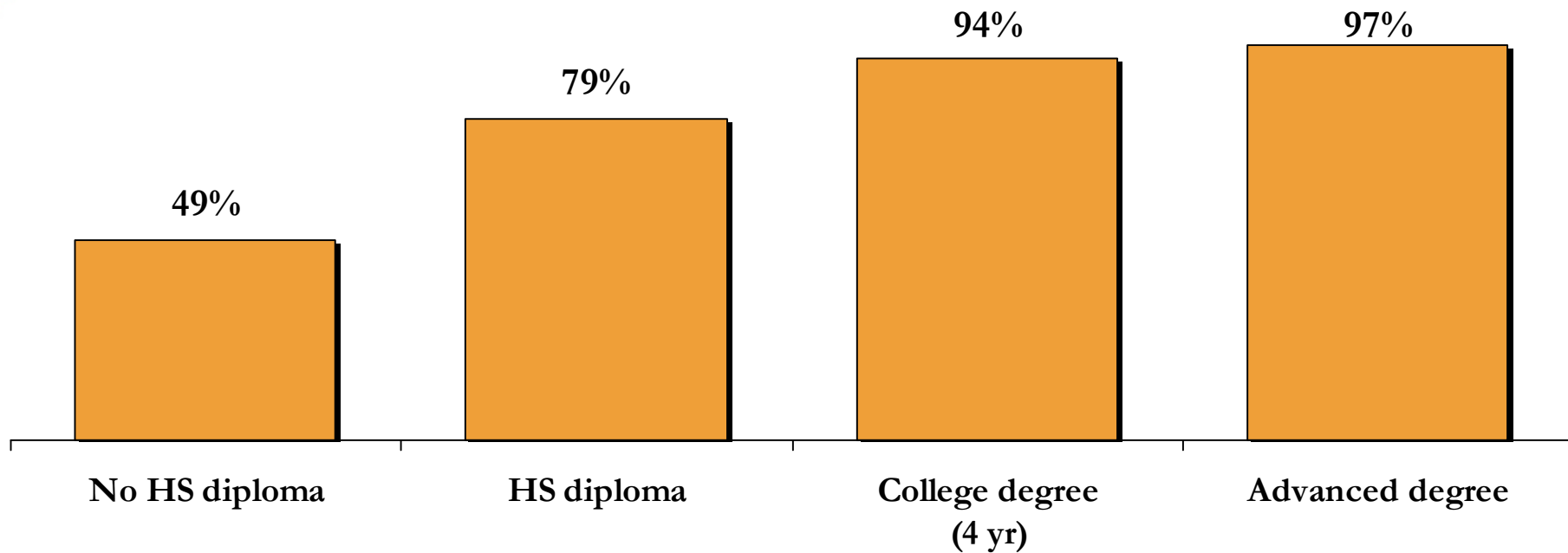
Percent of Ohio residents who access the Internet from home



Statewide Average: 75% of Ohio residents report having an Internet connection at home (dial-up or broadband).

Ohio Residents Who Access the Internet (Dial-Up or Broadband) From Home or Some Other Place

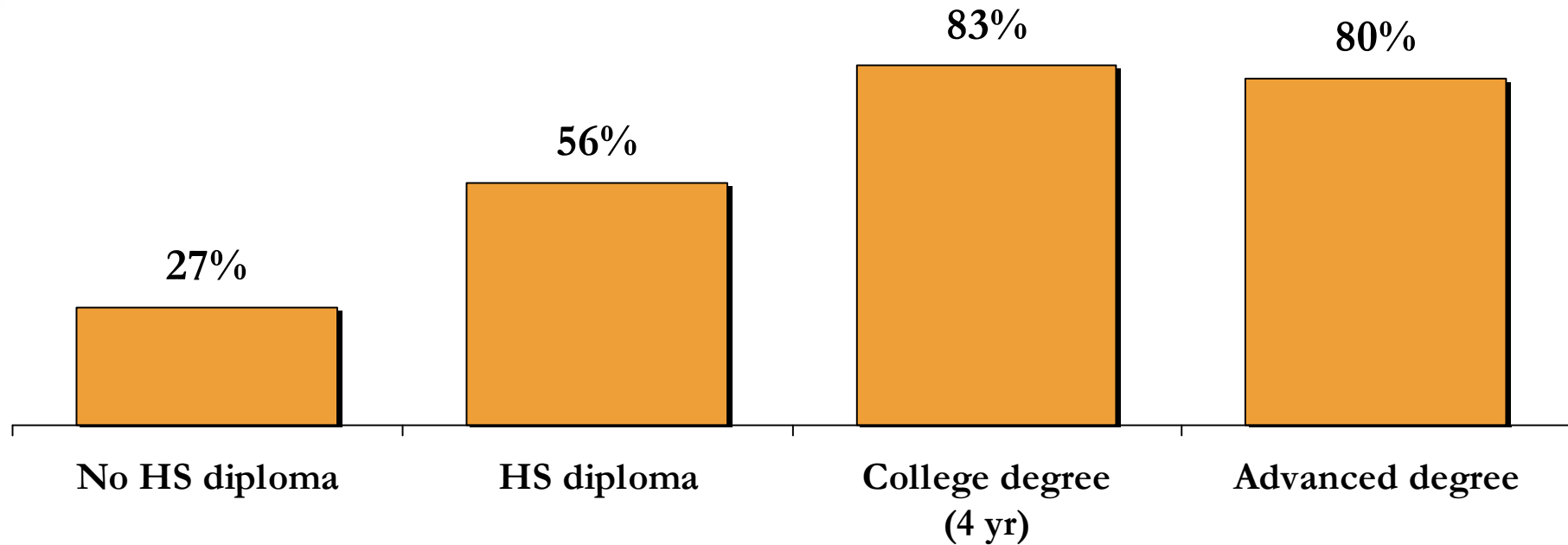
Percent of Ohio residents who access the Internet from home or some other place



Statewide Average: 82% of Ohio residents report using the Internet at home or someplace else.

Ohio Residents With Home Broadband Service

Percent of all Ohio residents who access broadband from home



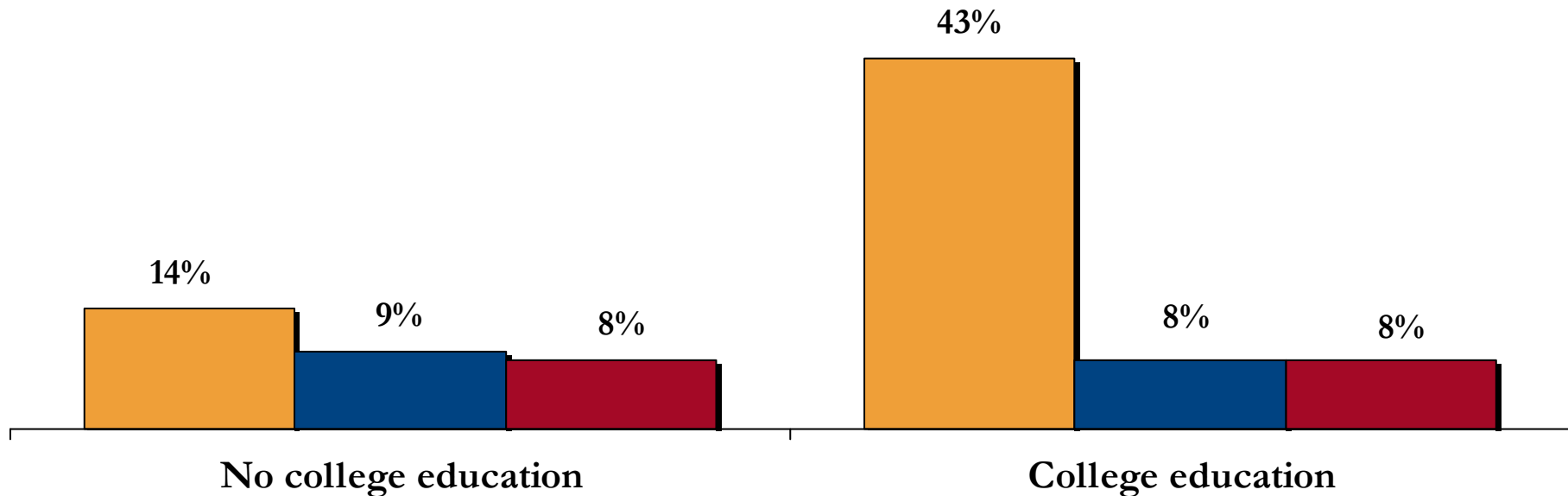
Statewide Average: 62% of all Ohio residents have home broadband service.

Q: Which of the following describe the type of Internet service you have at home?
(n=1,200 OH residents)
2009 © Connect Ohio®

Most Popular Places for Ohio Residents to Access the Internet

Percent of all Ohio residents who access the Internet at the following locales



■ At work ■ At someone else's home ■ At the library



Q: At what locations do you have access to the Internet?
(n=1,200 OH residents)
2009 © Connect Ohio®

Searching for Information Online

Percent of Ohio Internet users who search for the following types of information online

Percentage is significantly* <i>higher</i> than the state average: 	No HS diploma	HS diploma	College degree (4yr)	Advanced degree
Percentage is significantly* <i>lower</i> than the state average: 				
Product or service information	30%	58%	73%	76%
Health or medical information	27%	45%	58%	61%
Information about events in your community	36%	37%	49%	62%
Research for schoolwork	40%	34%	40%	42%
Information about government services	13%	35%	41%	43%
Jobs or employment	35%	37%	29%	27%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of information have you used the internet to look for online?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Communicating Online

Percent of Ohio Internet users who communicate with others in the following ways

Percentage is significantly* <i>higher</i> than the state average: 	No HS diploma	HS diploma	College degree (4yr)	Advanced degree
Percentage is significantly* <i>lower</i> than the state average: 				
E-mail	67%	80%	92%	94%
Instant messages	24%	24%	24%	28%
Posting content to a website	12%	18%	24%	20%
Chatting in chat rooms	12%	7%	5%	6%
Posting content to a blog	8%	8%	11%	12%
Social or professional networking sites such as Facebook	58%	34%	36%	36%
Microblogs such as Twitter	6%	6%	6%	6%



*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following ways of communicating with others have you used?
(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Interacting Online

Percent of Ohio Internet users who interact with the following individuals or organizations

Percentage is significantly* <i>higher</i> than the state average: 	No HS diploma	HS diploma	College degree (4yr)	Advanced degree
Percentage is significantly* <i>lower</i> than the state average: 				
Friends or family	63%	71%	82%	85%
Companies with which you do business	13%	35%	55%	52%
Co-workers	19%	30%	54%	60%
Health insurance company	13%	22%	28%	30%
Teachers	11%	19%	31%	34%
Ohio state government	4%	19%	25%	31%
Doctors or healthcare professionals	13%	19%	22%	22%
Local government	4%	14%	19%	23%
Elected officials	6%	10%	21%	13%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of individuals or organizations have you interacted with online, by visiting a website or communicating online to obtain information?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Online Transactions

Percent of Ohio Internet users who conduct the following transactions online

Percentage is significantly* <i>higher</i> than the state average: 	Percentage is significantly* <i>lower</i> than the state average: 	No HS diploma	HS diploma	College degree (4yr)	Advanced degree
		Purchasing a product or service online	19%	45%	67%
Booking travel arrangements	12%	22%	36%	42%	
Paying bills	20%	49%	57%	61%	
Online banking	20%	44%	57%	61%	
Online transactions with government	15%	25%	32%	40%	
Selling a product or service online	2%	9%	19%	15%	
Buying, selling, or trading investments	6%	6%	17%	15%	

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of transactions have you completed online?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Online Activities

Percent of Ohio Internet users who conduct the following activities online

	No HS diploma	HS diploma	College degree (4yr)	Advanced degree
Percentage is significantly* <i>higher</i> than the state average: 				
Percentage is significantly* <i>lower</i> than the state average: 				
Using a search engine	54%	62%	78%	86%
Sending or receiving photos	46%	42%	56%	52%
Reading newspapers or other news sources	44%	54%	63%	78%
Playing games online	46%	41%	35%	27%
Downloading music	34%	29%	31%	33%
Watching videos, movies, or TV shows online	44%	29%	38%	35%
Working from home	7%	19%	41%	46%
Reading blogs	24%	20%	28%	25%
Taking online classes	3%	8%	11%	7%



*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following activities have you conducted online?
(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Barriers to Internet Adoption

Percent of Ohio residents who have no home Internet service for the following reasons

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	No college education	College education
I don't own a computer	51%	53%
I don't need the Internet	38%	38%
Too expensive	21%	24%
I can get Internet access somewhere else	7%	21%
Broadband isn't available, and I don't want dial-up	6%	9%
Concerns about fraud or identity theft	10%	10%

The lack of a home computer is the top barrier to Internet adoption among both educational groups.



*Significance measured at a 95% confidence level

Q: Why don't you subscribe to the Internet at home?

(n=300 OH residents with no Internet service in their household)

Internet Victimization

Percent of Ohio Internet users who have been victims of the following

Percentage is significantly* <i>higher</i> than the state average: 	No HS diploma	HS diploma	College degree (4yr)	Advanced degree
Percentage is significantly* <i>lower</i> than the state average: 				
Spam or junk e-mail	48%	69%	82%	87%
Computer viruses or spyware	49%	44%	47%	53%
Credit card fraud	7%	6%	10%	11%
Identity theft	8%	4%	4%	9%
None of the above	38%	24%	13%	10%

*significance measured at a 95% confidence level

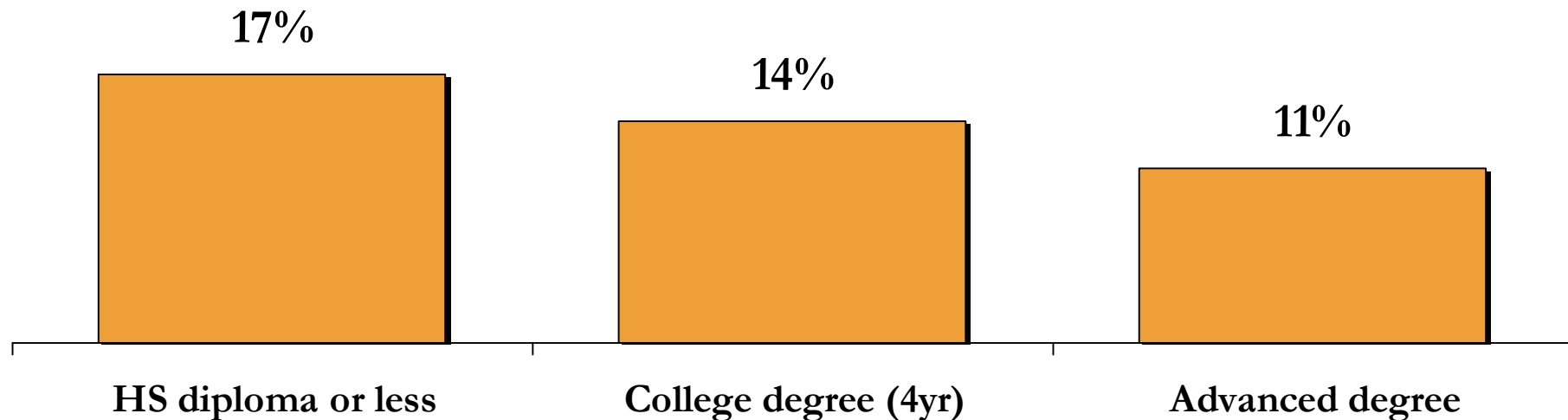
Q: Have you ever been a victim to any of the following [issues] through the Internet?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Home Telephone Calls Through a Broadband Connection (VoIP)

Among Ohio residents with home broadband service



Statewide Average: 15% of Ohio residents with home broadband service say they make or receive home telephone calls through their broadband connection (VoIP).

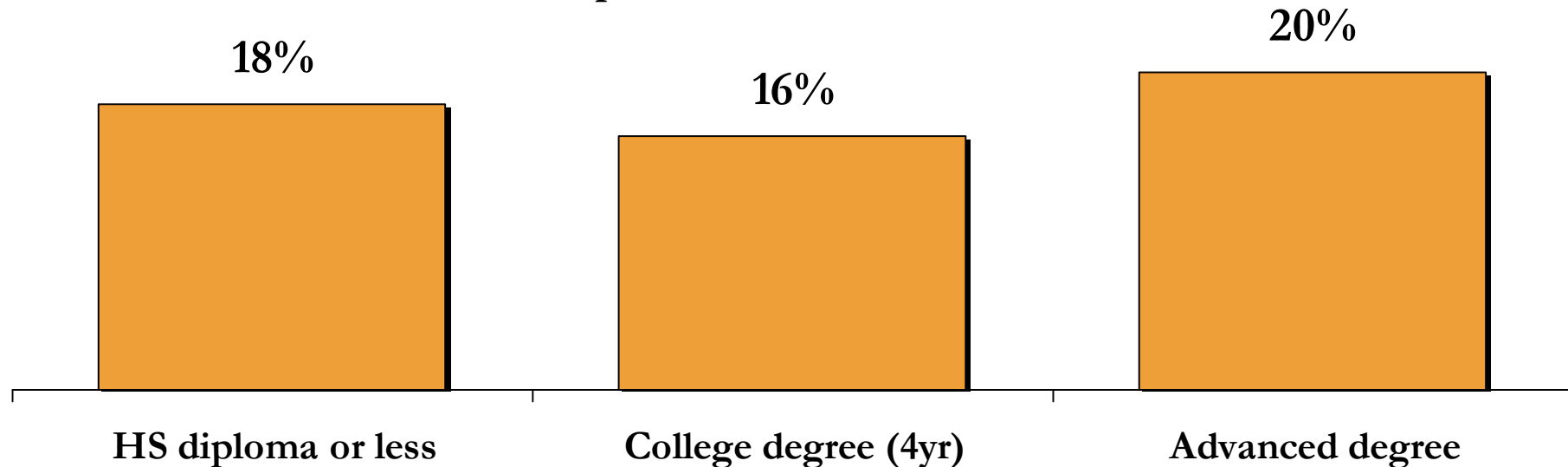
Q: Do you make or receive home telephone calls through your Internet connection?

(n=733 OH residents with home broadband service)

2009 © Connect Ohio[®]

Likely to Pay an Extra \$10 Per Month to Double Broadband Speeds

Percent of Ohio broadband subscribers who would be likely to upgrade their speed for \$10 more a month





Statewide Average: 18% of Ohio broadband subscribers would be likely to pay \$10 more a month for broadband speeds that are twice as fast as their current service.

Q: Would you be likely to subscribe to a broadband service that was twice as fast as your current connection speed for an additional ten dollars per month above what you are paying now?
(n=733 OH residents with broadband service at home)
2009 © Connect Ohio[®]

Why Ohio Residents Subscribe to Broadband

Percent of Ohio residents who subscribe to broadband for the following reasons

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	No college education	College education
Realized broadband was worth the extra money	39%	41%
Broadband became available in my area	31%	31%
Got a computer for the home	40%	33%
Broadband costs have gone down	37%	39%
I needed to conduct business online	15%	26%
I heard about the benefits of broadband	21%	24%
Friends or family convinced me	21%	15%

*Significance measured at a 95% confidence level

Q: Which of the following contributed to your decision to subscribe to broadband service?

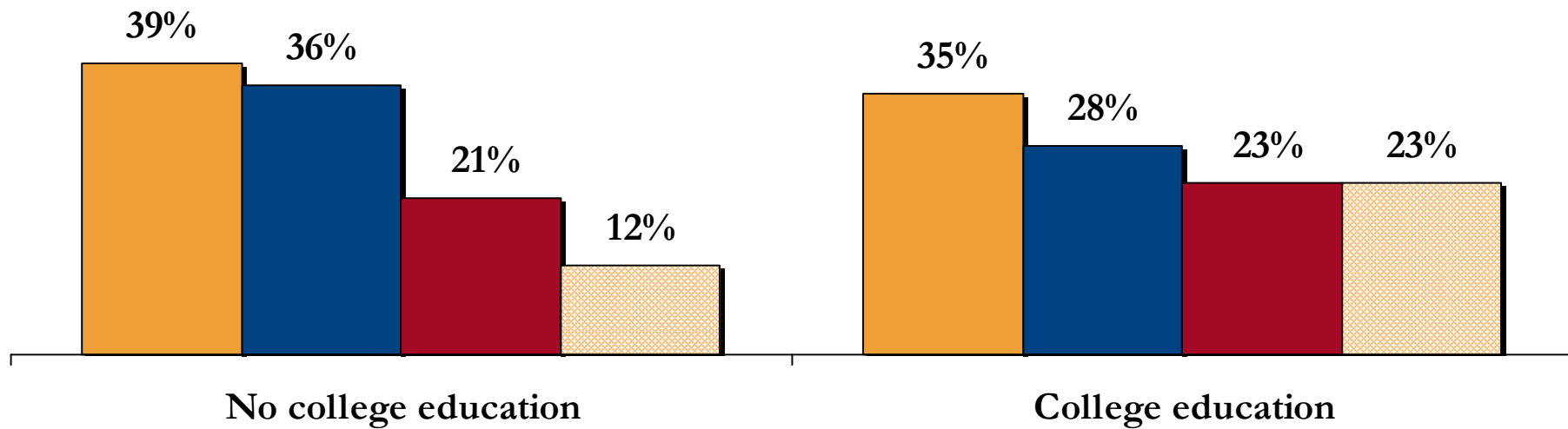
(n=733 OH residents with broadband service at home)

2009 © Connect Ohio®

Top Barriers to Broadband Adoption

Percent of Ohio residents who choose not to subscribe to broadband

- Don't need broadband or don't understand the benefit
- Don't own a computer
- Broadband is too expensive
- Broadband is not available where I live

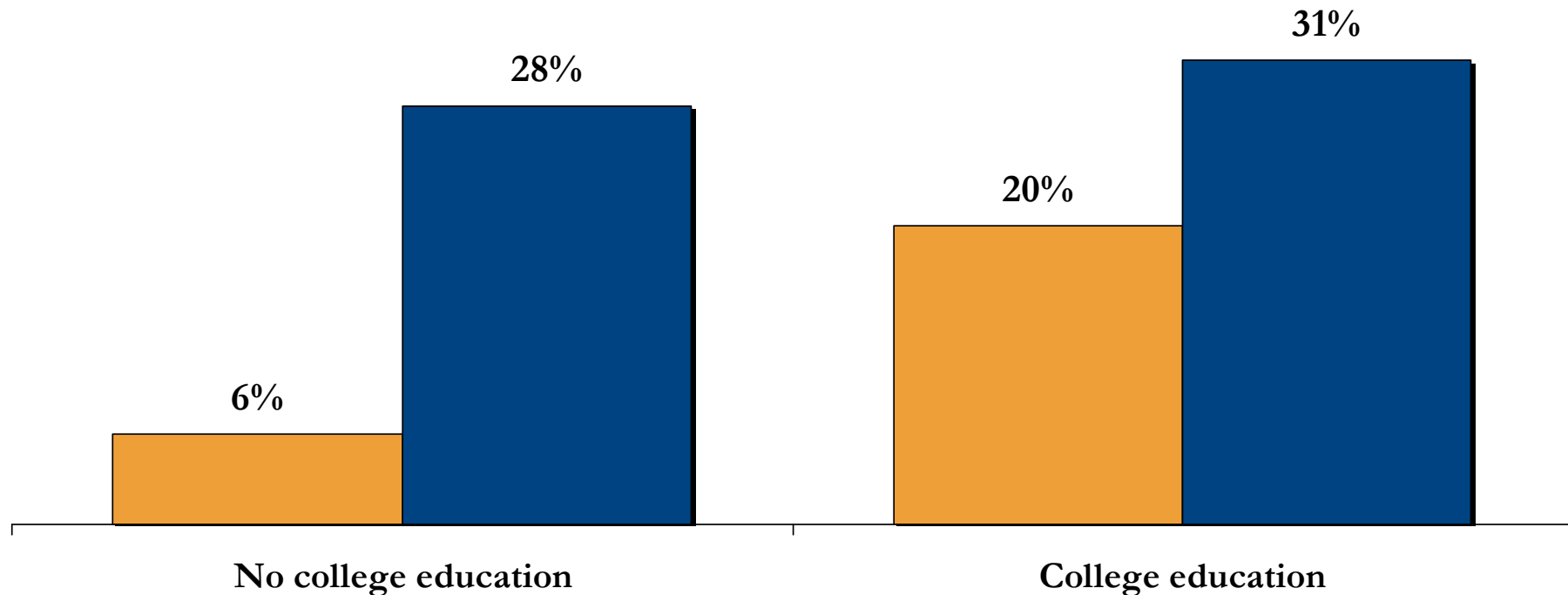


Among respondents both with and without a college education, the perceived lack of need is the top barrier to broadband adoption.

Ohio Residents and Telework

Among Ohio adults employed full- or part-time

■ Telework via the Internet
 ■ Do not telework, but would if employer allowed it



Q: Do you ever work from home related to your job or self employment? And

Q: Would you be interested in teleworking if your employer allowed it?

(n=688 OH residents employed full- or part-time)

140

2009 © Connect Ohio®

Do Not Copy Without Written Permission

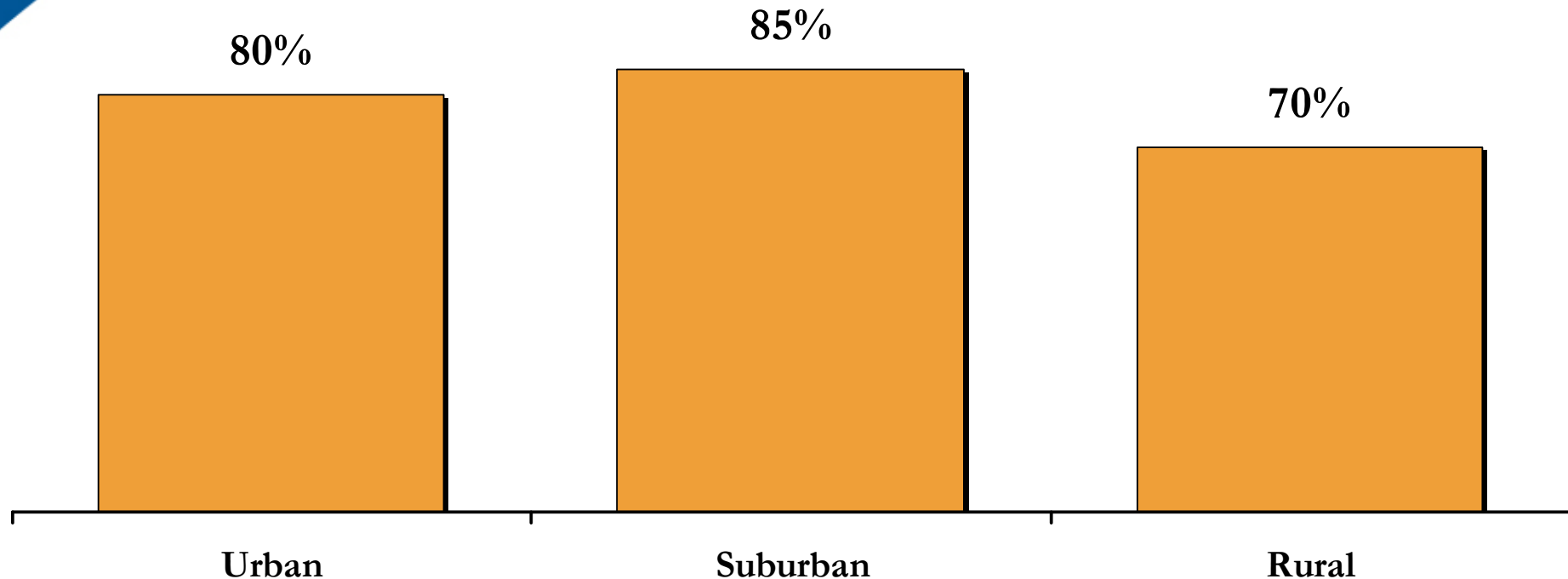
Source: 2009 Connect Ohio® Statewide Residential Technology Assessment

www.connectohio.org

Residential Technology Assessment by Urban-Rural Classification

Ohio Residents With a Computer at Home

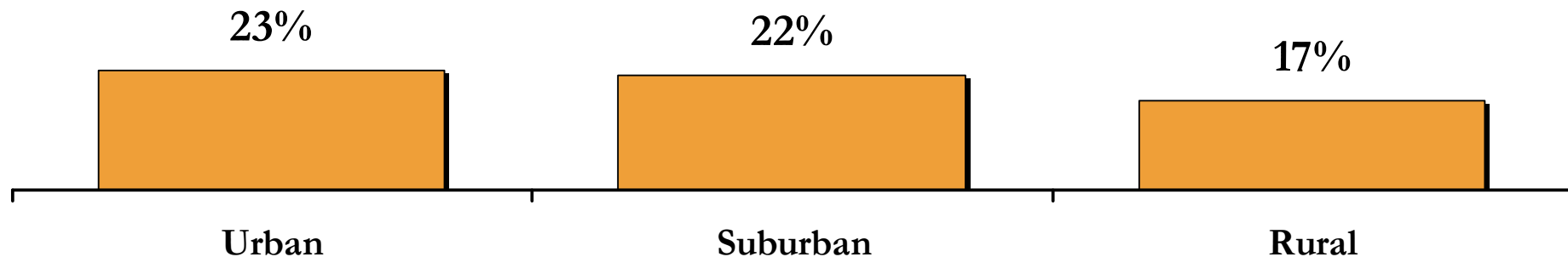
Percent of Ohio residents who have a computer at home



Statewide Average: 79% of Ohio residents report having a personal computer at home.

Computer Purchases in the Last Year

Percent of Ohio residents who have purchased a new home computer
within the last year

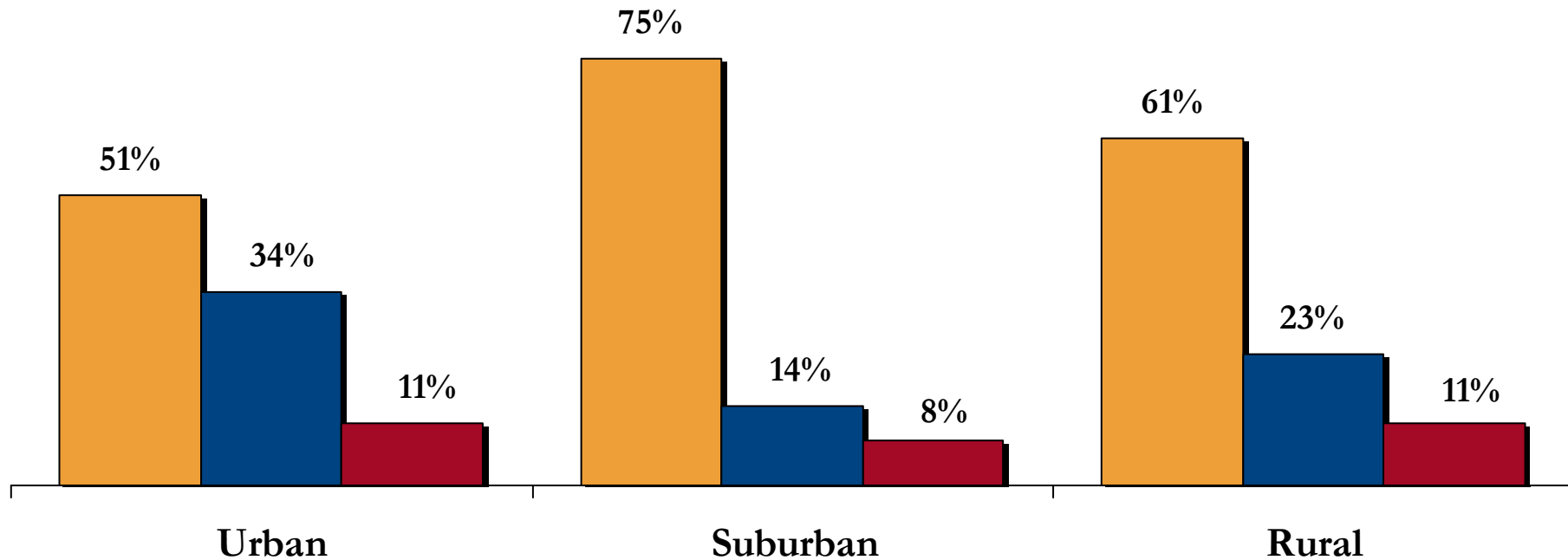


Statewide Average: 21% of Ohio adults report purchasing a new computer last year.

Barriers to Computer Ownership

Among Ohio residents who do not own a home computer

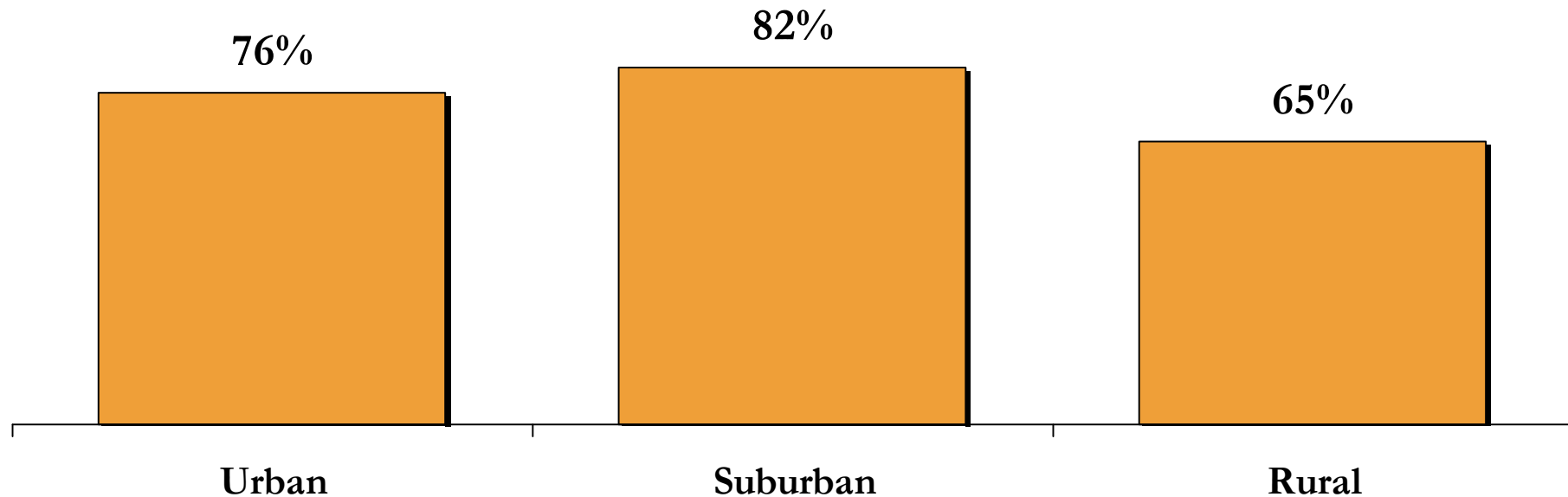
■ Don't need a computer
 ■ Too expensive
 ■ Use a computer at a different location



Q: Why don't you have a computer at home?
 (n=258 OH residents with no computer in their household)
 2009 © Connect Ohio®

Ohio Residents With an Internet Connection at Home (Either Dial-Up or Broadband)

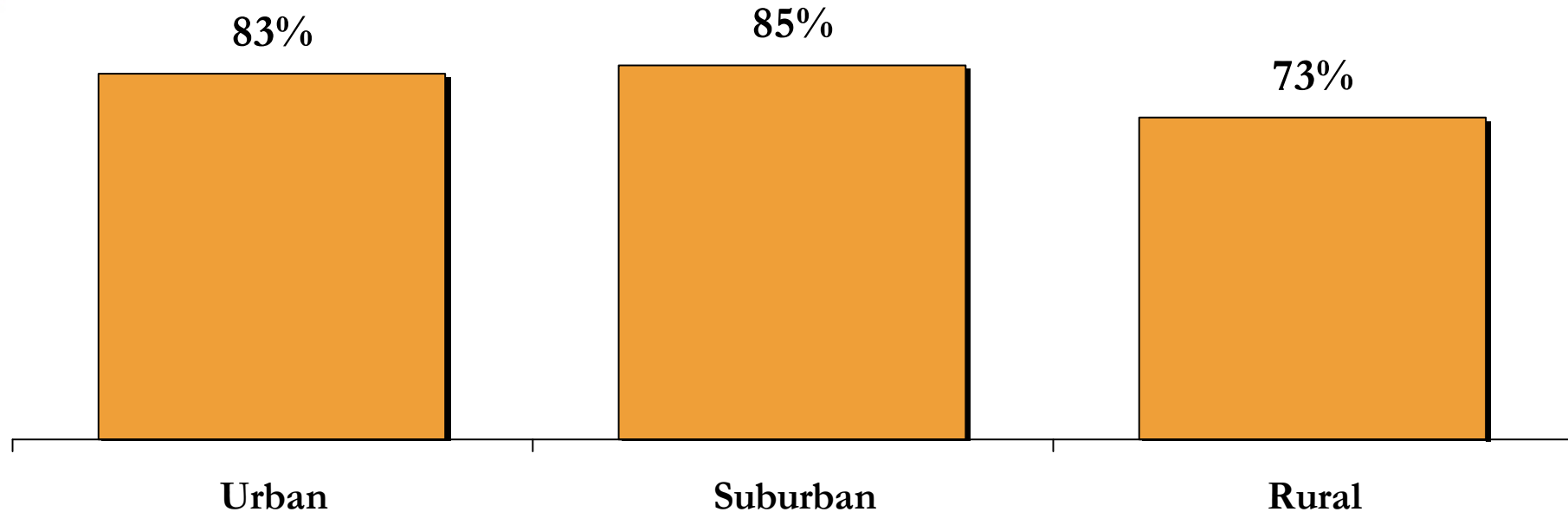
Percent of Ohio residents who access the Internet from home



Statewide Average: 75% of Ohio residents report having an Internet connection at home (dial-up or broadband).

Ohio Residents Who Access the Internet (Dial-Up or Broadband) From Home or Some Other Place

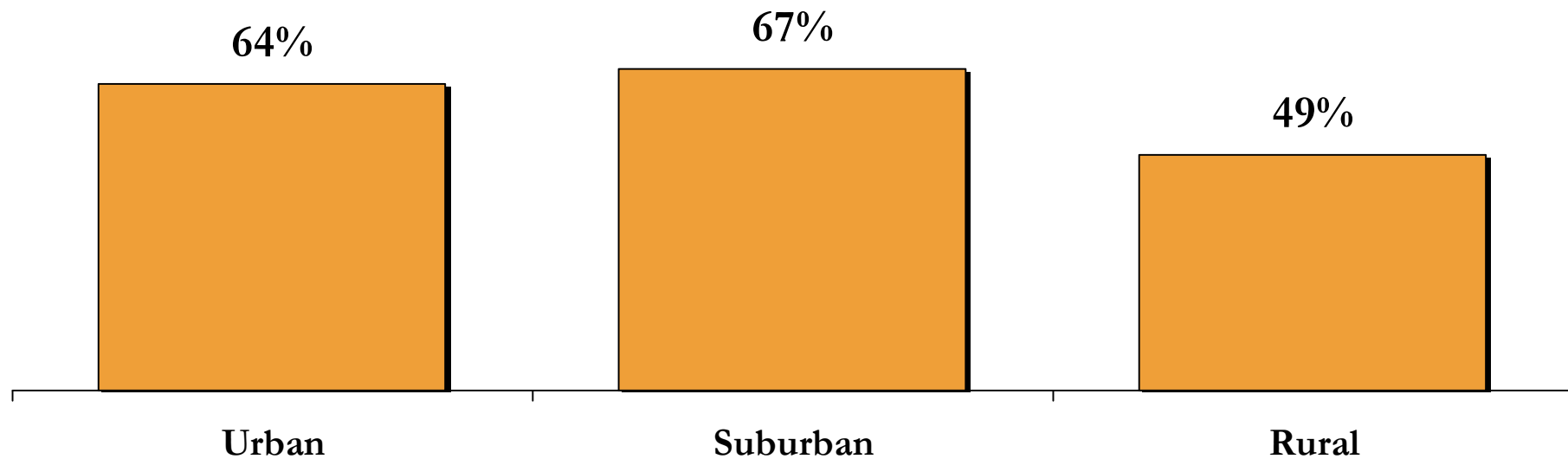
Percent of Ohio residents who access the Internet from home or some other place



Statewide Average: 82% of Ohio residents report using the Internet at home or someplace else.

Ohio Residents With Home Broadband Service

Percent of all Ohio residents who access broadband from home



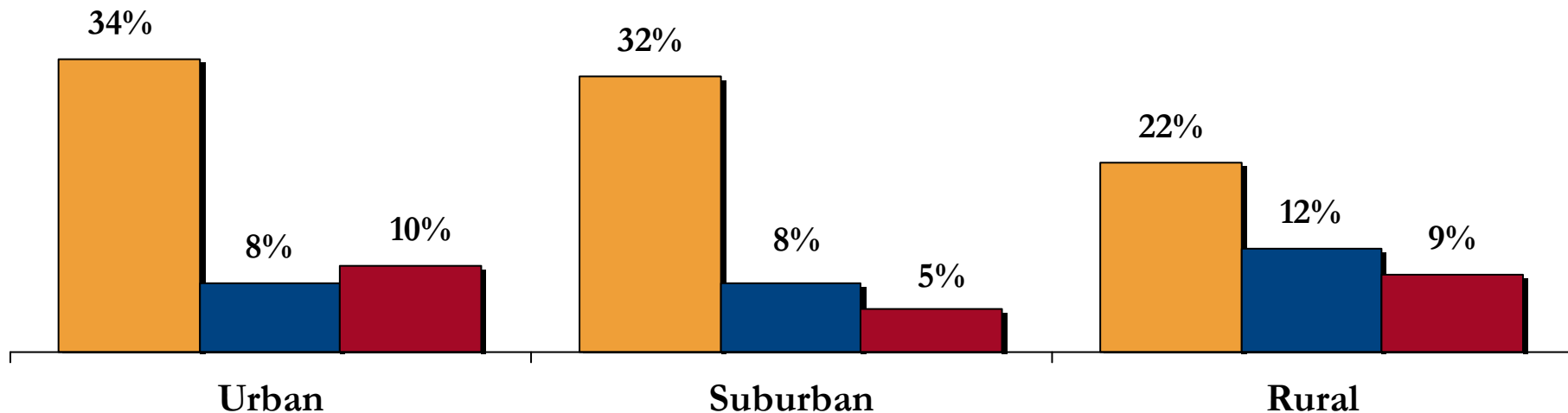
Statewide Average: 62% of all Ohio residents have home broadband service.

Q: Which of the following describe the type of Internet service you have at home?
(n=1,200 OH residents)
2009 © Connect Ohio®

Most Popular Places for Ohio Residents to Access the Internet

Percent of all Ohio residents who access the Internet at the following locales



■ At work
 ■ At someone else's home
 ■ At the library



Q: At what locations do you have access to the Internet?
 (n=1,200 OH residents)
 2009 © Connect Ohio®

Searching for Information Online

Percent of Ohio Internet users who search for the following types of information online

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Urban	Suburban	Rural
Product or service information	65%	62%	58%
Health or medical information	50%	51%	46%
Information about events in your community	47%	41%	37%
Research for schoolwork	39%	36%	33%
Information about government services	38%	35%	33%
Jobs or employment	36%	31%	30%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of information have you used the Internet to look for online?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Communicating Online

Percent of Ohio Internet users who communicate with others in the following ways

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Urban	Suburban	Rural
E-mail	84%	86%	82%
Instant messages	27%	22%	22%
Posting content to a website	21%	22%	13%
Chatting in chat rooms	7%	8%	5%
Posting content to a blog	11%	9%	7%
Social or professional networking sites such as Facebook	38%	34%	34%
Microblogs such as Twitter	5%	6%	9%



*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following ways of communicating with others have you used?
(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Interacting Online

Percent of Ohio Internet users who interact with the following individuals or organizations

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Urban	Suburban	Rural
Friends or family	73%	79%	74%
Companies with which you do business	39%	44%	42%
Co-workers	41%	39%	36%
Health insurance company	24%	25%	22%
Teachers	25%	24%	20%
Ohio state government	22%	23%	18%
Doctors or healthcare professionals	21%	20%	18%
Local government	16%	18%	13%
Elected officials	13%	14%	12%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of individuals or organizations have you interacted with online, by visiting a website or communicating online to obtain information?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Online Transactions

Percent of Ohio Internet users who conduct the following transactions online

	Urban	Suburban	Rural
Percentage is significantly* <i>higher</i> than the state average: 			
Percentage is significantly* <i>lower</i> than the state average: 			
Purchasing a product or service online	51%	58%	45%
Booking travel arrangements	30%	27%	22%
Paying bills	52%	56%	40%
Online banking	47%	52%	45%
Online transactions with government	31%	28%	21%
Selling a product or service online	11%	16%	9%
Buying, selling, or trading investments	9%	12%	8%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of transactions have you completed online?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Online Activities

Percent of Ohio Internet users who conduct the following activities online

	Urban	Suburban	Rural
Percentage is significantly* <i>higher</i> than the state average: 			
Percentage is significantly* <i>lower</i> than the state average: 			
Using a search engine	69%	71%	65%
Sending or receiving photos	45%	50%	47%
Reading newspapers or other news sources	62%	58%	54%
Playing games online	37%	36%	40%
Downloading music	30%	35%	25%
Watching videos, movies, or TV shows online	33%	35%	30%
Working from home	29%	28%	24%
Reading blogs	25%	21%	20%
Taking online classes	10%	6%	8%



*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following activities have you conducted online?
(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Barriers to Internet Adoption

Percent of Ohio residents who have no home Internet service for the following reasons

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Urban	Suburban	Rural
I don't own a computer	51%	57%	51%
I don't need the Internet	40%	39%	38%
Too expensive	19%	24%	24%
I can get Internet access somewhere else	12%	11%	9%
Broadband isn't available, and I don't want dial-up	3%	7%	12%
Concerns about fraud or identity theft	9%	15%	8%

The lack of a home computer is the top barrier to Internet adoption among urban, suburban, and rural residents alike.



*Significance measured at a 95% confidence level

Q: Why don't you subscribe to the Internet at home?

(n=300 OH residents with no Internet service in their household)

Internet Victimization

Percent of Ohio Internet users who have been victims of the following

	Urban	Suburban	Rural
Percentage is significantly* <i>higher</i> than the state average: 			
Percentage is significantly* <i>lower</i> than the state average: 			
Spam or junk e-mail	72%	77%	70%
Computer viruses or spyware	43%	47%	52%
Credit card fraud	7%	6%	13%
Identity theft	5%	4%	7%
None of the above	22%	17%	21%

*significance measured at a 95% confidence level

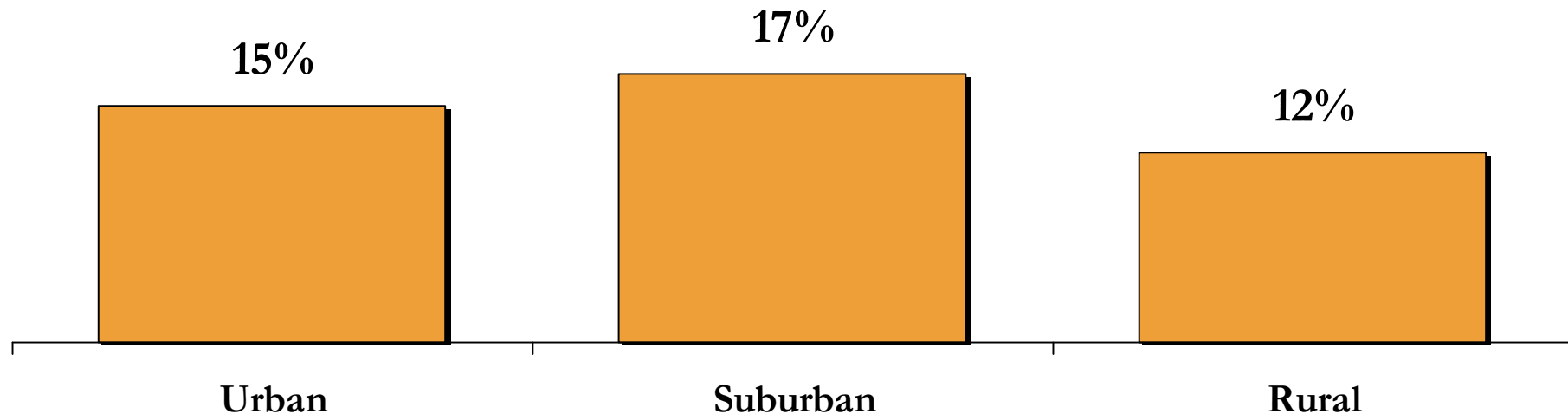
Q: Have you ever been a victim to any of the following [issues] through the Internet?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Home Telephone Calls Through a Broadband Connection (VoIP)

Among Ohio residents with home broadband service



Statewide Average: 15% of Ohio residents with home broadband service say they make or receive home telephone calls through their broadband connection (VoIP).

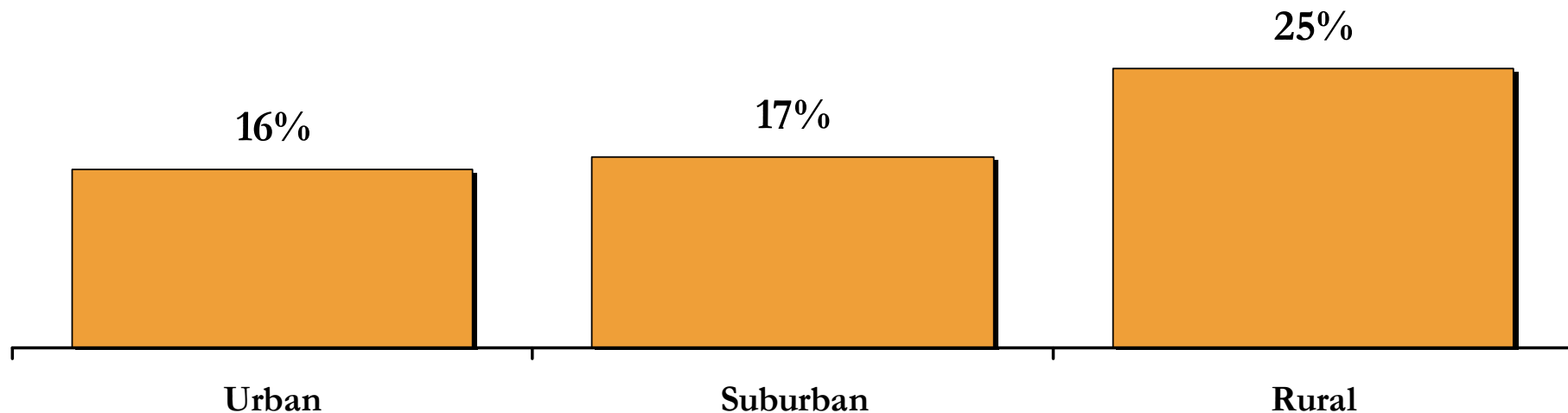
Q: Do you make or receive home telephone calls through your Internet connection?

(n=733 OH residents with home broadband service)

2009 © Connect Ohio®

Likely to Pay an Extra \$10 Per Month to Double Broadband Speeds

Percent of Ohio broadband subscribers who would be likely to upgrade their speed for \$10 more a month





Statewide Average: 18% of Ohio broadband subscribers would be likely to pay \$10 more a month for broadband speeds that are twice as fast as their current service.

Q: Would you be likely to subscribe to a broadband service that was twice as fast as your current connection speed for an additional ten dollars per month above what you are paying now?
(n=733 OH residents with broadband service at home)
2009 © Connect Ohio®

Why Ohio Residents Subscribe to Broadband

Percent of Ohio residents who subscribe to broadband for the following reasons

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Urban	Suburban	Rural
Realized broadband was worth the extra money	36%	47%	40%
Broadband became available in my area	27%	35%	33%
Got a computer for the home	29%	42%	40%
Broadband costs have gone down	39%	39%	37%
Needed to conduct business online	21%	27%	21%
Heard about the benefits of broadband	20%	26%	25%
Friends or family convinced me	15%	17%	19%

*Significance measured at a 95% confidence level

Q: Which of the following contributed to your decision to subscribe to broadband service?

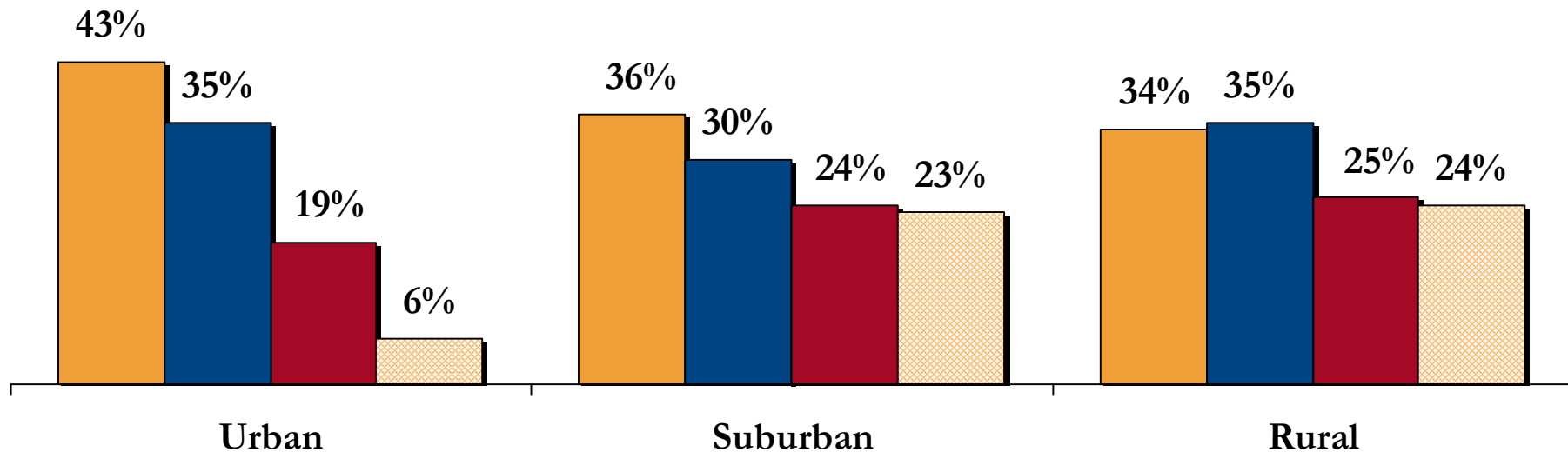
(n=733 OH residents with broadband service at home)

2009 © Connect Ohio®

Top Barriers to Broadband Adoption

Percent of Ohio residents who choose not to subscribe to broadband

- Don't need broadband or don't understand the benefit
- Don't own a computer
- Broadband is too expensive
- Broadband is not available where I live

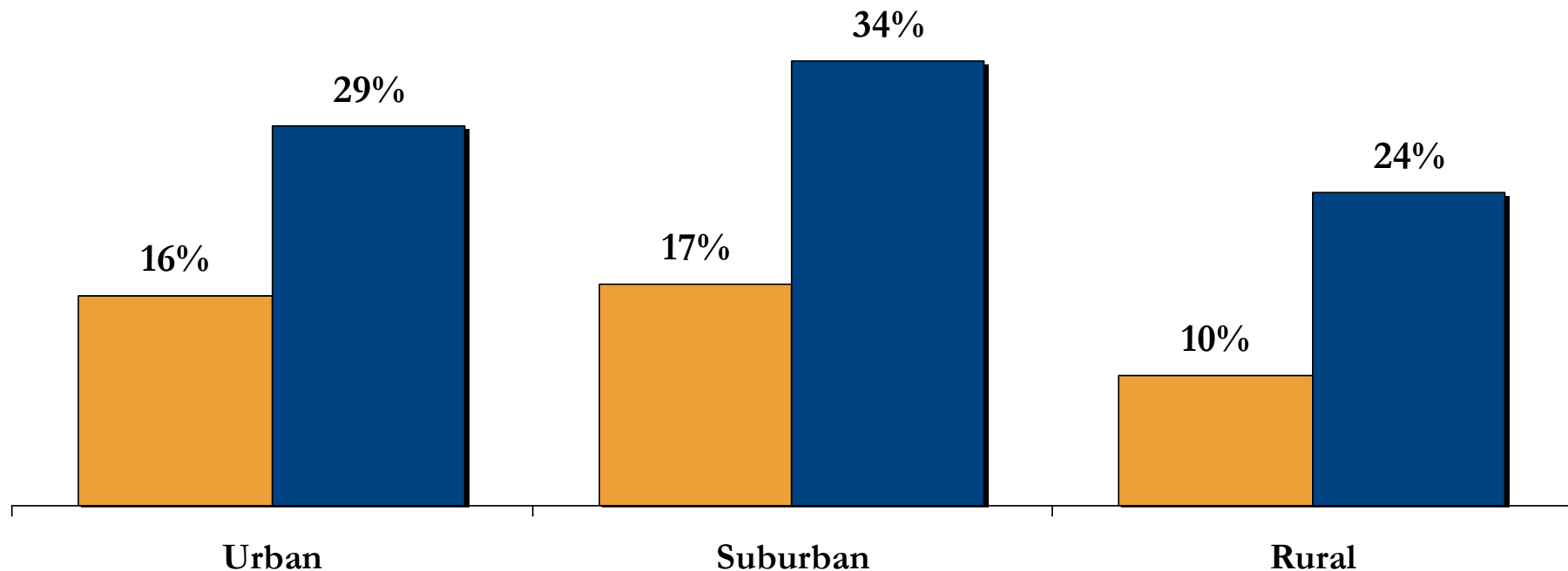


Lack of a computer and a perceived lack of need for home broadband service are the top barriers to broadband adoption among urban, suburban, and rural residents alike. Rural and suburban residents, though, are more likely than urbanites to cite a lack of availability as a barrier.

Ohio Residents and Telework

Among Ohio adults employed full- or part-time

■ Telework via the Internet ■ Do not telework, but would if employer allowed it



Q: Do you ever work from home related to your job or self employment? And

Q: Would you be interested in teleworking if your employer allowed it?

(n=688 OH residents employed full- or part-time)

160

2009 © Connect Ohio®

Do Not Copy Without Written Permission

Source: 2009 Connect Ohio® Statewide Residential Technology Assessment

www.connectohio.org

Residential Technology Assessment by Annual Household Income

Ohio Residents With a Computer at Home

Percent of Ohio residents who have a computer at home

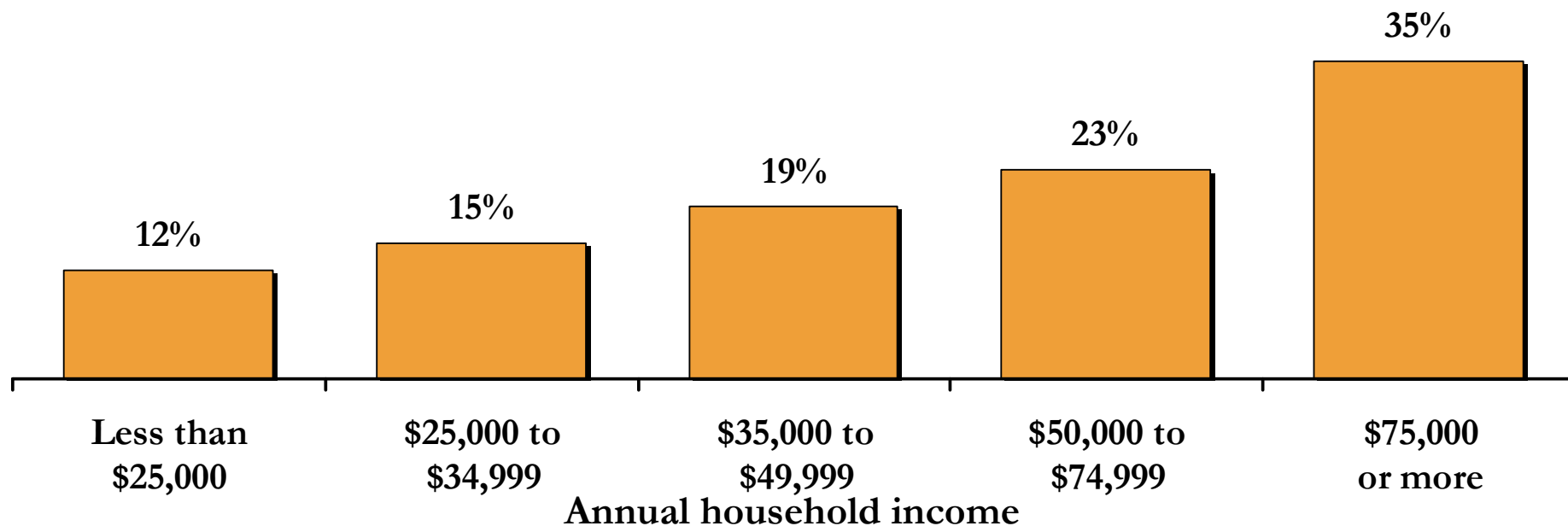


Statewide Average: 79% of Ohio residents report having a personal computer at home.

Q: Do you have a computer at home?
(n=1,200 OH residents)
2009 © Connect Ohio®

Computer Purchases in the Last Year

Percent of Ohio residents who have purchased a new home computer
within the last year

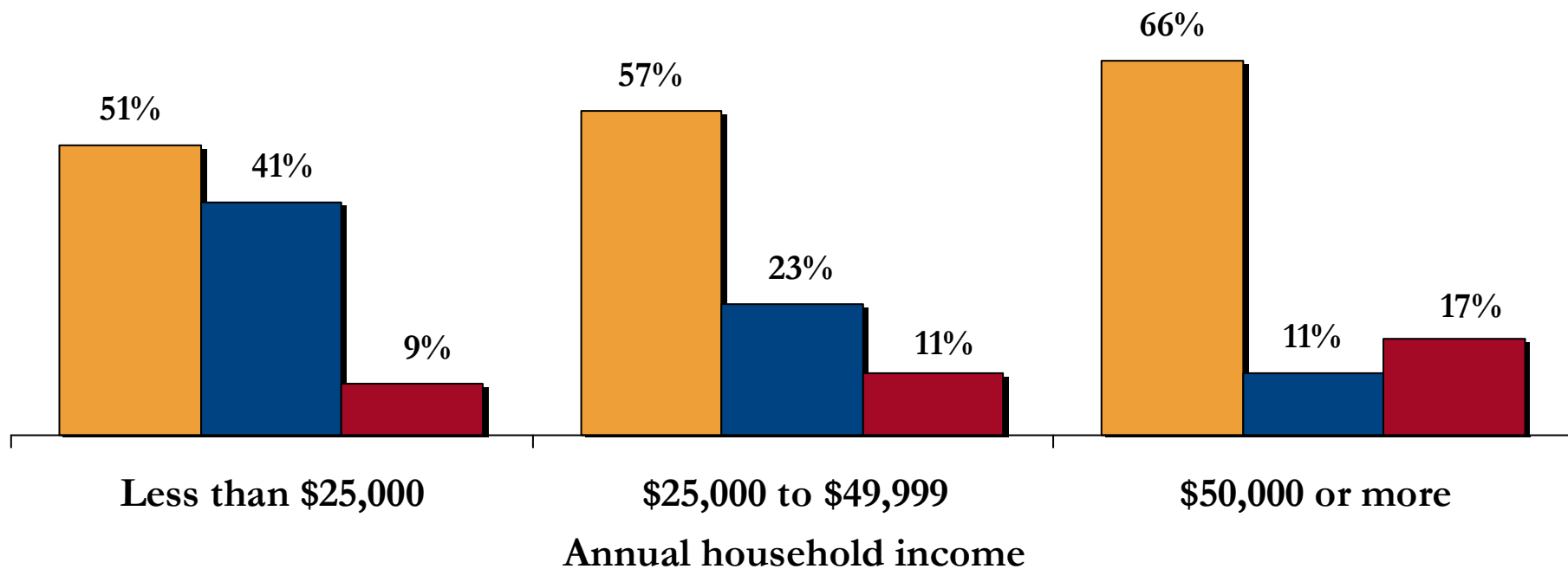


Statewide Average: 21% of Ohio adults report purchasing a new computer last year.

Barriers to Computer Ownership

Among Ohio residents who do not own a home computer

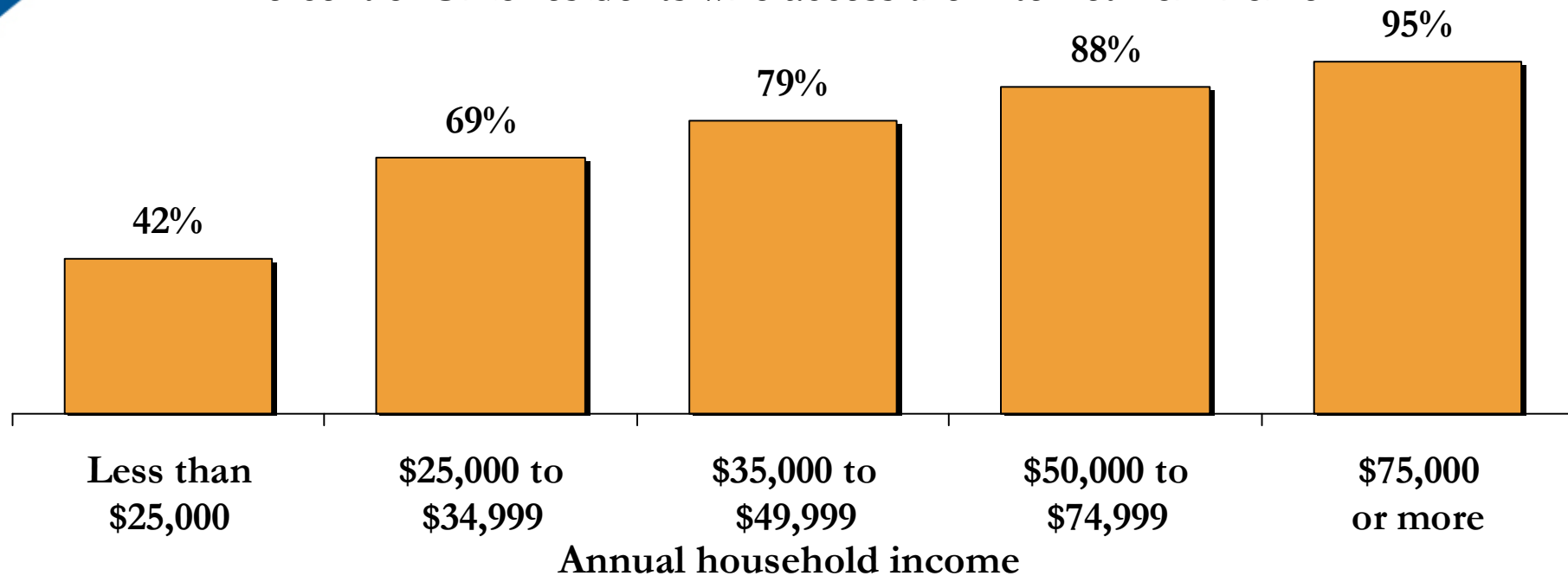
■ Don't need a computer
 ■ Too expensive
 ■ Use a computer at a different location



Q: Why don't you have a computer at home?
 (n=258 OH residents with no computer in their household)
 2009 © Connect Ohio®

Ohio Residents With an Internet Connection at Home (Either Dial-Up or Broadband)

Percent of Ohio residents who access the Internet from home



Statewide Average: 75% of Ohio residents report having an Internet connection at home (dial-up or broadband).

Ohio Residents Who Access the Internet (Dial-Up or Broadband) From Home or Some Other Place

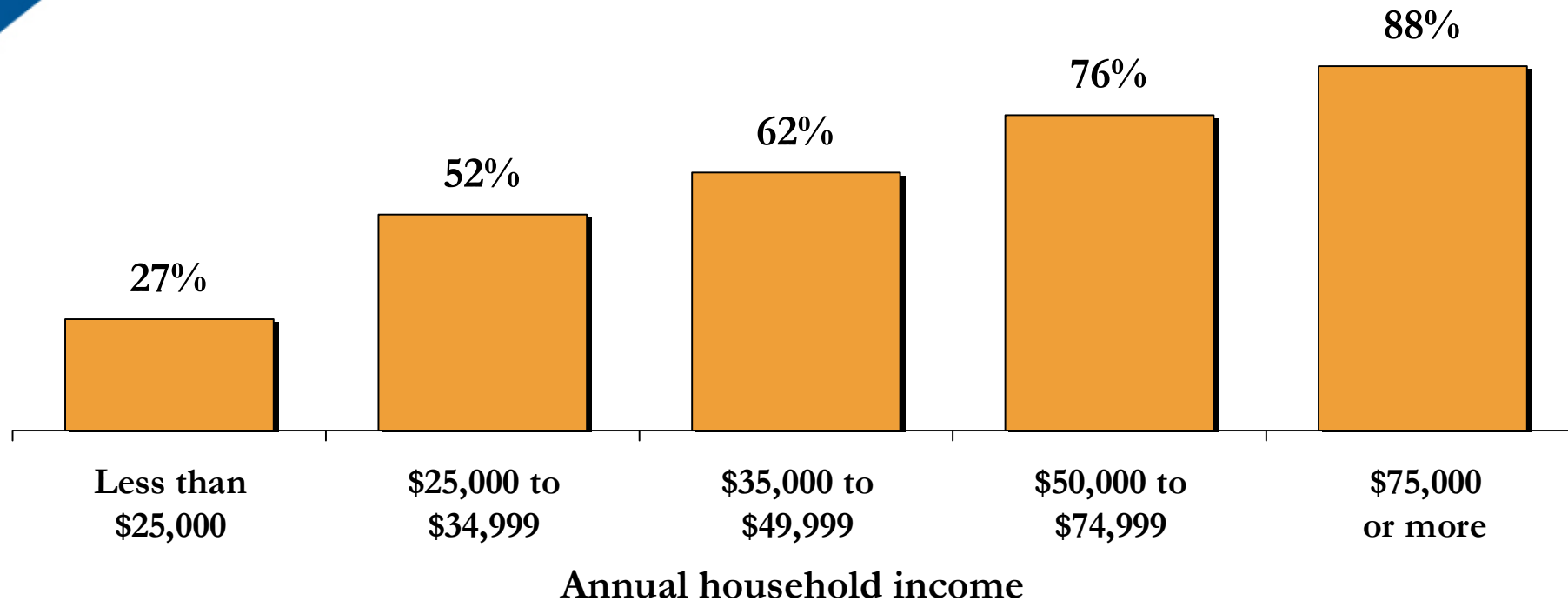
Percent of Ohio residents who access the Internet from home or some other place



Statewide Average: 82% of Ohio residents report using the Internet at home or someplace else.

Ohio Residents With Home Broadband Service

Percent of all Ohio residents who access broadband from home



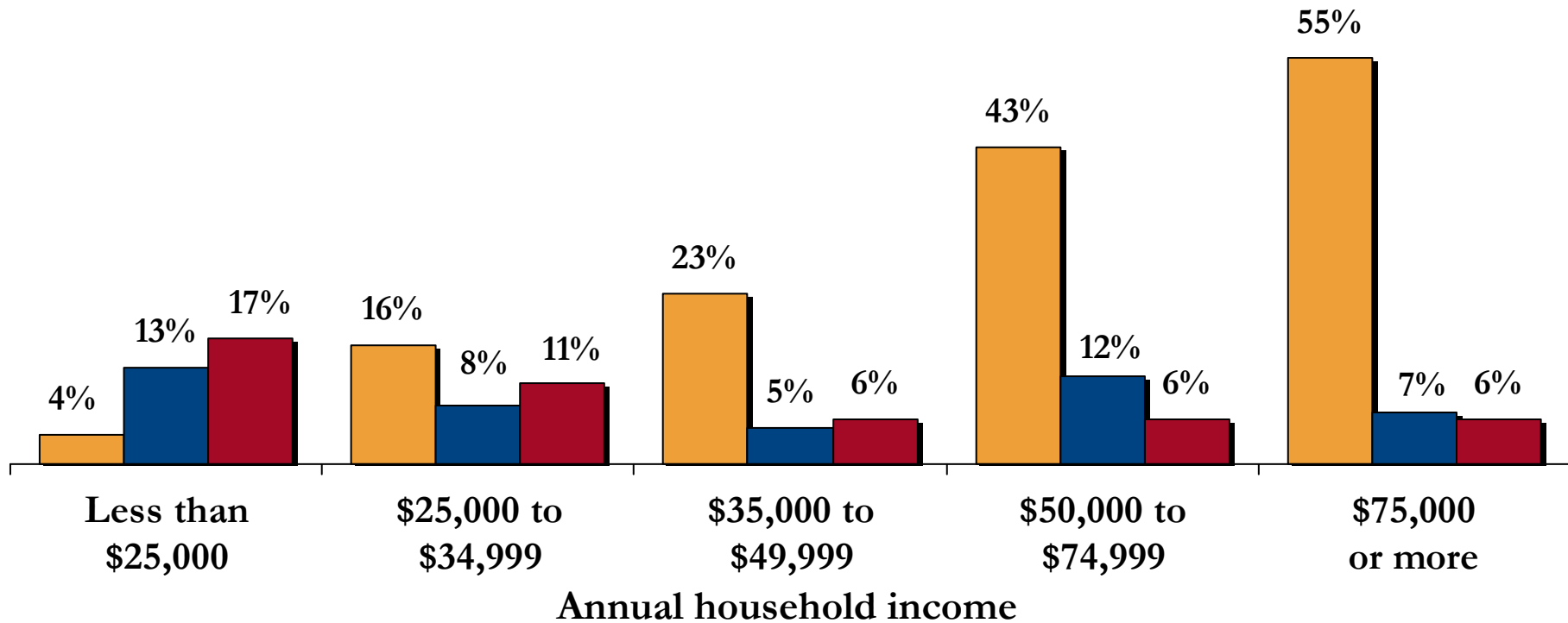
Statewide Average: 62% of all Ohio residents have home broadband service.

Q: Which of the following describe the type of Internet service you have at home?
 (n=1,200 OH residents)
 2009 © Connect Ohio®

Most Popular Places for Ohio Residents to Access the Internet

Percent of all Ohio residents who access the Internet at the following locales



■ At work
 ■ At someone else's home
 ■ At the library



Q: At what locations do you have access to the Internet?
 (n=1,200 OH residents)
 2009 © Connect Ohio®

Searching for Information Online

Percent of Ohio Internet users who search for the following types of information online
Annual household income

		Less than \$25,000	\$25,000-\$34,999	\$35,000-\$49,999	\$50,000-\$74,999	\$75,000 or more
Percentage is significantly* <i>higher</i> than the state average:						
Percentage is significantly* <i>lower</i> than the state average:						
Product or service information		39%	61%	55%	68%	78%
Health or medical information		39%	45%	45%	51%	58%
Information about events in your community		38%	39%	30%	43%	56%
Research for schoolwork		40%	33%	32%	41%	41%
Information about government services		33%	32%	34%	31%	45%
Jobs or employment		45%	36%	35%	36%	29%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of information have you used the internet to look for online?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Communicating Online

Percent of Ohio Internet users who communicate with others in the following ways
Annual household income

Percentage is significantly* <i>higher</i> than the state average: 	Less than \$25,000	\$25,000-\$34,999	\$35,000-\$49,999	\$50,000-\$74,999	\$75,000 or more
Percentage is significantly* <i>lower</i> than the state average: 					
E-mail	71%	80%	83%	88%	92%
Instant messages	28%	32%	22%	22%	30%
Posting content to a website	19%	18%	17%	18%	26%
Chatting in chat rooms	9%	9%	5%	8%	6%
Posting content to a blog	10%	6%	7%	11%	11%
Social or professional networking sites such as Facebook	48%	29%	29%	36%	41%
Microblogs such as Twitter	7%	4%	2%	8%	8%



*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following ways of communicating with others have you used?
(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Interacting Online

Percent of Ohio Internet users who interact with the following individuals or organizations
Annual household income

	Less than \$25,000	\$25,000-\$34,999	\$35,000-\$49,999	\$50,000-\$74,999	\$75,000 or more
Percentage is significantly* <i>higher</i> than the state average: 					
Percentage is significantly* <i>lower</i> than the state average: 					
Friends or family	65%	77%	71%	74%	83%
Companies with which you do business	21%	31%	35%	45%	56%
Co-workers	18%	31%	32%	45%	54%
Health insurance company	17%	14%	30%	25%	32%
Teachers	17%	19%	19%	24%	33%
Ohio state government	18%	19%	25%	19%	28%
Doctors or healthcare professionals	17%	21%	23%	18%	26%
Local government	10%	13%	18%	15%	22%
Elected officials	9%	5%	13%	13%	20%

*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following types of individuals or organizations have you interacted with online, by visiting a website or communicating online to obtain information?



(n=964 OH residents who use the Internet)

2009 © Connect Ohio[®]

Online Transactions

Percent of Ohio Internet users who conduct the following transactions online

Annual household income

	Less than \$25,000	\$25,000-\$34,999	\$35,000-\$49,999	\$50,000-\$74,999	\$75,000 or more
Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 					
Purchasing a product or service online	28%	36%	46%	57%	69%
Booking travel arrangements	12%	15%	16%	24%	44%
Paying bills	35%	39%	49%	60%	64%
Online banking	26%	34%	48%	59%	64%
Online transactions with government	14%	19%	32%	33%	39%
Selling a product or service online	5%	6%	11%	13%	20%
Buying, selling, or trading investments	6%	4%	6%	13%	15%

*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following types of transactions have you completed online?



(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Online Activities

Percent of Ohio Internet users who conduct the following activities online

Annual household income

		Less than \$25,000	\$25,000-\$34,999	\$35,000-\$49,999	\$50,000-\$74,999	\$75,000 or more
Percentage is significantly* <i>higher</i> than the state average:						
Percentage is significantly* <i>lower</i> than the state average:						
Using a search engine		61%	64%	59%	71%	82%
Sending or receiving photos		38%	43%	42%	46%	61%
Reading newspapers or other news sources		45%	54%	57%	62%	71%
Playing games online		45%	47%	35%	36%	38%
Downloading music		34%	30%	29%	26%	40%
Watching videos, movies, or TV shows online		30%	30%	27%	31%	41%
Working from home		13%	18%	15%	30%	44%
Reading blogs		25%	18%	19%	22%	29%
Taking online classes		12%	6%	7%	7%	10%



*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following activities have you conducted online?
(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Barriers to Internet Adoption

Percent of Ohio residents who have no home Internet service for the following reasons
Annual household income

Percentage is significantly* <i>higher</i> than the state average: 	Less than \$25,000	\$25,000 to \$49,999	\$50,000 or more
Percentage is significantly* <i>lower</i> than the state average: 			
I don't own a computer	55%	56%	33%
I don't need the Internet	37%	31%	50%
Too expensive	31%	14%	23%
I can get Internet access somewhere else	13%	11%	8%
Broadband isn't available, and I don't want dial-up	6%	10%	10%
Concerns about fraud or identity theft	13%	3%	11%

Among residents whose annual household income is less than \$50,000, the lack of a computer is the top barrier to Internet adoption.

At the same time, one-half of residents with annual household incomes of \$50,000 or more who do not subscribe to home Internet service believe they have no need for it.

*Significance measured at a 95% confidence level

Q: Why don't you subscribe to the Internet at home?

(n=300 OH residents with no Internet service in their household)

174

2009 © Connect Ohio®



Do Not Copy Without Written Permission

Source: 2009 Connect Ohio® Statewide Residential Technology Assessment

www.connectohio.org

Internet Victimization

Percent of Ohio Internet users who have been victims of the following
Annual household income

	Less than \$25,000	\$25,000-\$34,999	\$35,000-\$49,999	\$50,000-\$74,999	\$75,000 or more
Percentage is significantly* <i>higher</i> than the state average: 					
Percentage is significantly* <i>lower</i> than the state average: 					
Spam or junk e-mail	61%	71%	63%	79%	84%
Computer viruses or spyware	39%	44%	33%	51%	56%
Credit card fraud	7%	3%	5%	8%	11%
Identity theft	9%	2%	2%	5%	6%
None of the above	28%	23%	32%	14%	11%

*significance measured at a 95% confidence level

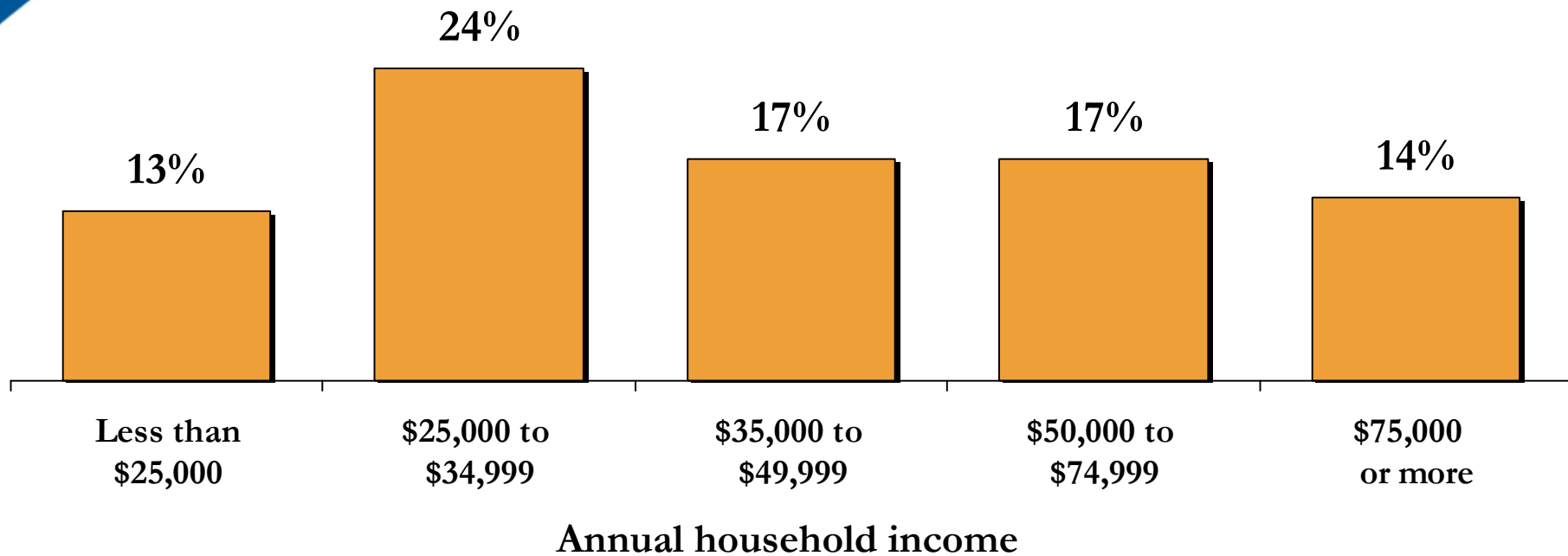
Q: Have you ever been a victim to any of the following [issues] through the Internet?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Home Telephone Calls Through a Broadband Connection (VoIP)

Among Ohio residents with home broadband service



Statewide Average: 15% of Ohio residents with home broadband service say they make or receive home telephone calls through their broadband connection (VoIP).

Q: Do you make or receive home telephone calls through your Internet connection?

(n=733 OH residents with home broadband service)

2009 © Connect Ohio®

Likely to Pay an Extra \$10 Per Month to Double Broadband Speeds

Percent of Ohio broadband subscribers who would be likely to upgrade their speed for \$10 more a month





Statewide Average: 18% of Ohio broadband subscribers would be likely to pay \$10 more a month for broadband speeds that are twice as fast as their current service.

Q: Would you be likely to subscribe to a broadband service that was twice as fast as your current connection speed for an additional ten dollars per month above what you are paying now?
 (n=733 OH residents with broadband service at home)
 2009 © Connect Ohio®

Why Ohio Residents Subscribe to Broadband

Percent of Ohio residents who subscribe to broadband for the following reasons

Annual household income

Percentage is significantly* <i>higher</i> than the state average: 	Less than \$25,000	\$25,000-\$34,999	\$35,000-\$49,999	\$50,000-\$74,999	\$75,000 or more
Percentage is significantly* <i>lower</i> than the state average: 					
Realized broadband was worth the extra money	38%	30%	44%	43%	44%
Broadband became available in my area	24%	32%	28%	32%	33%
Got a computer for the home	38%	36%	43%	34%	32%
Broadband costs have gone down	45%	37%	50%	38%	36%
I needed to conduct business online	18%	20%	26%	25%	25%
I heard about the benefits of broadband	19%	24%	26%	27%	21%
Friends or family convinced me	26%	28%	12%	15%	13%

*Significance measured at a 95% confidence level

Q: Which of the following contributed to your decision to subscribe to broadband service?

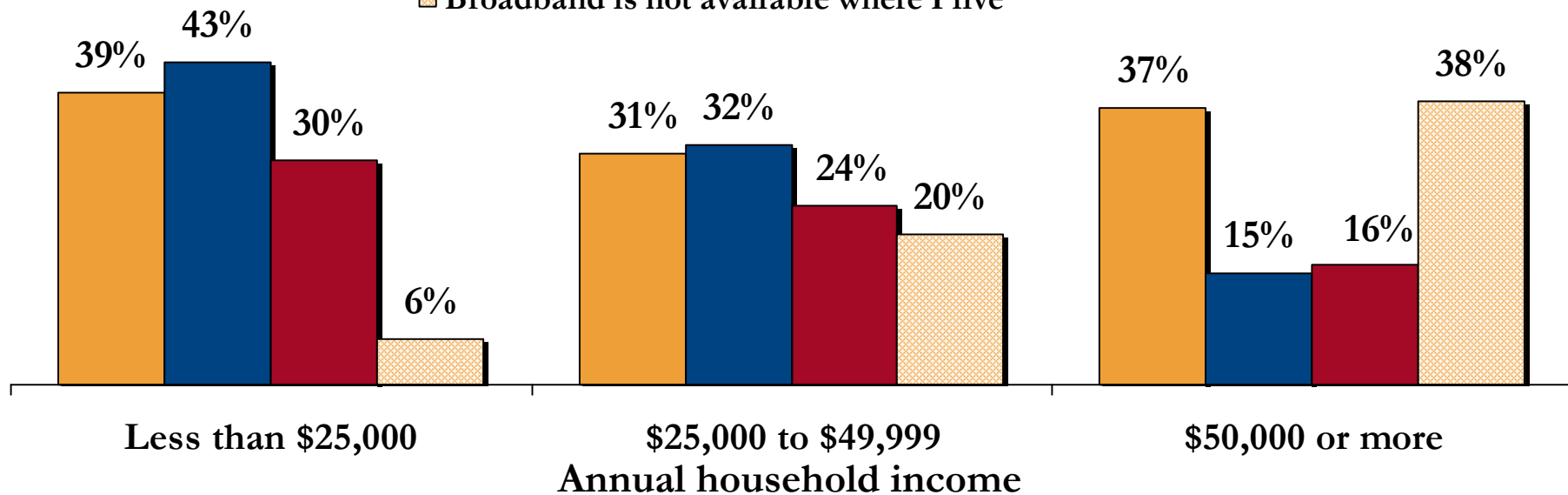
(n=733 OH residents with broadband service at home)

2009 © Connect Ohio®

Top Barriers to Broadband Adoption

Percent of Ohio residents who choose not to subscribe to broadband

- Don't need broadband or don't understand the benefit
- Don't own a computer
- Broadband is too expensive
- Broadband is not available where I live

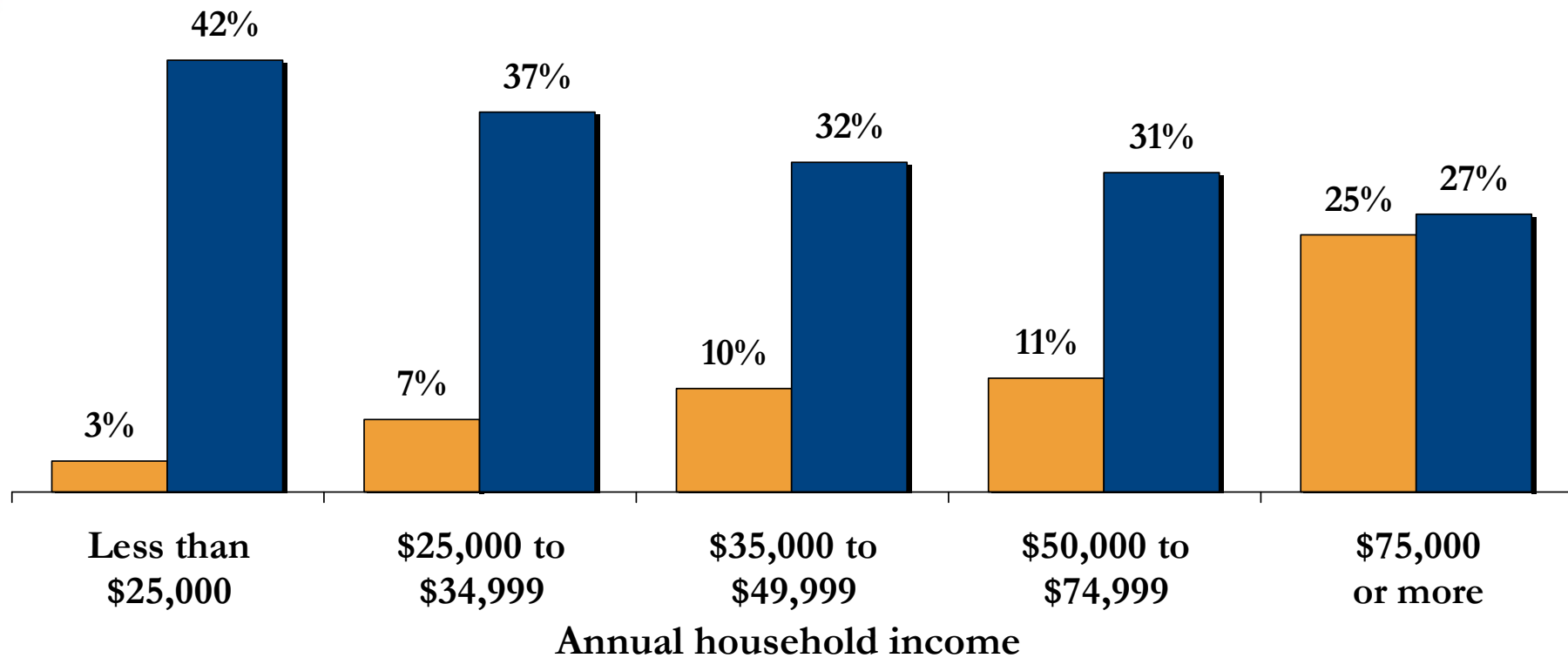


Lack of a computer and a perceived lack of need for home broadband service are the top barriers to broadband adoption, except among residents whose annual household income is \$50,000 or greater, for whom a lack of availability is the top barrier.

Ohio Residents and Telework

Among Ohio adults employed full- or part-time

■ Telework via the Internet
 ■ Do not telework, but would if employer allowed it



Q: Do you ever work from home related to your job or self employment? And

Q: Would you be interested in teleworking if your employer allowed it?

(n=688 OH residents employed full- or part-time)

180

2009 © Connect Ohio®

Do Not Copy Without Written Permission

Source: 2009 Connect Ohio® Statewide Residential Technology Assessment

www.connectohio.org

Residential Technology Assessment by Race

Ohio Residents With a Computer at Home

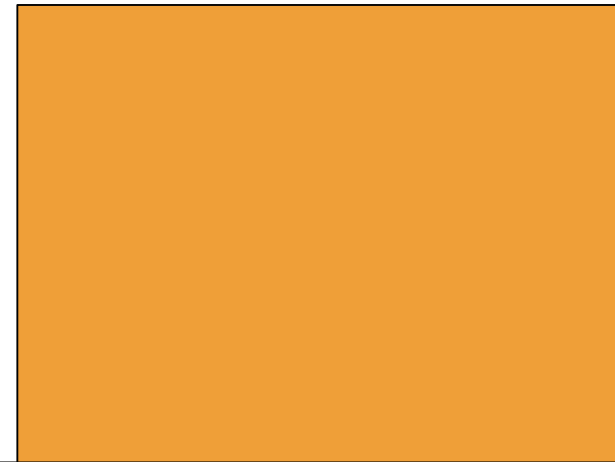
Percent of Ohio residents who have a computer at home

81%



Caucasian

75%

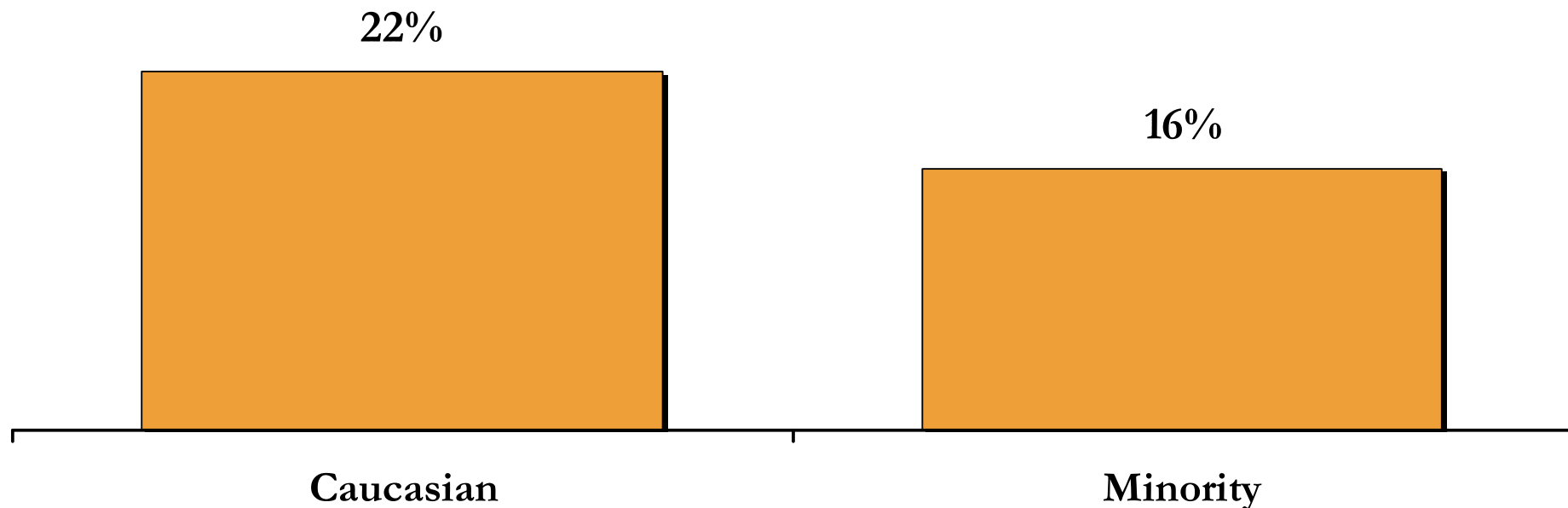


Minority

Statewide Average: 79% of Ohio residents report having a personal computer at home.

Computer Purchases in the Last Year

Percent of Ohio residents who have purchased a new home computer
within the last year

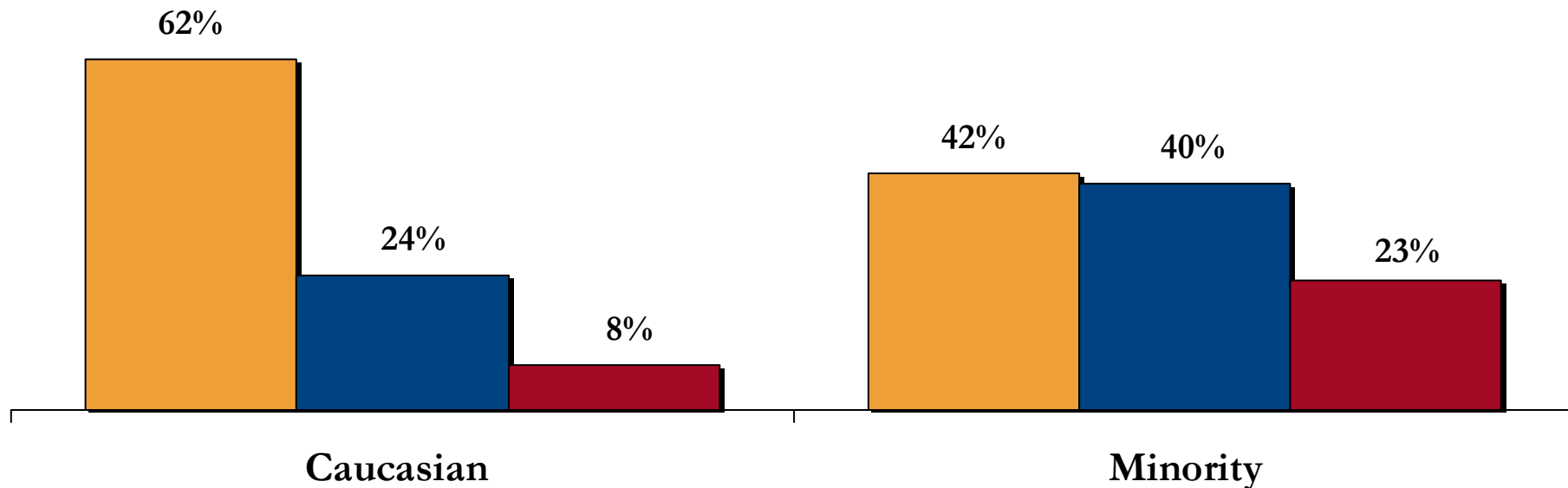


Statewide Average: 21% of Ohio adults report purchasing a new computer last year.

Barriers to Computer Ownership

Among Ohio residents who do not own a home computer

■ Don't need a computer
 ■ Too expensive
 ■ Use a computer at a different location



Q: Why don't you have a computer at home?
 (n=258 OH residents with no computer in their household)
 2009 © Connect Ohio®

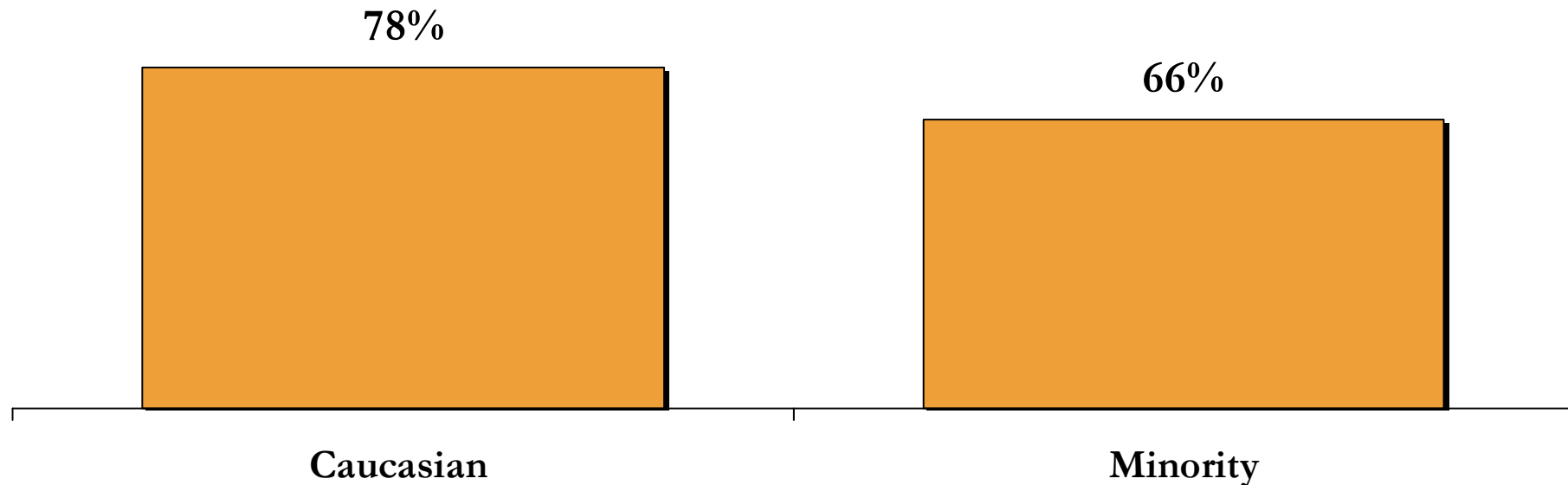
184

Do Not Copy Without Written Permission

Source: 2009 Connect Ohio® Statewide Residential Technology Assessment
www.connectohio.org

Ohio Residents With an Internet Connection at Home (Either Dial-Up or Broadband)

Percent of Ohio residents who access the Internet from home



Statewide Average: 75% of Ohio residents report having an Internet connection at home (dial-up or broadband).

Ohio Residents Who Access the Internet (Dial-Up or Broadband) From Home or Some Other Place

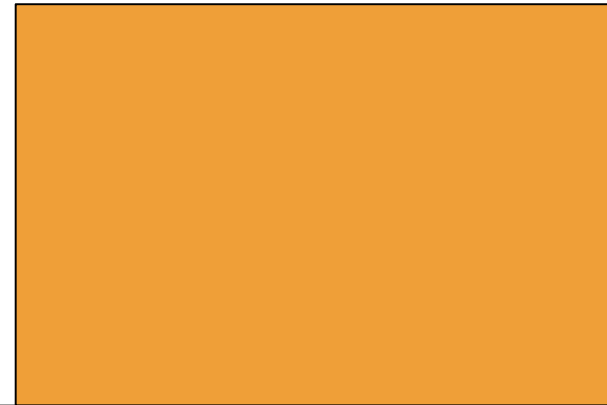
Percent of Ohio residents who access the Internet from home or some other place

83%



Caucasian

79%

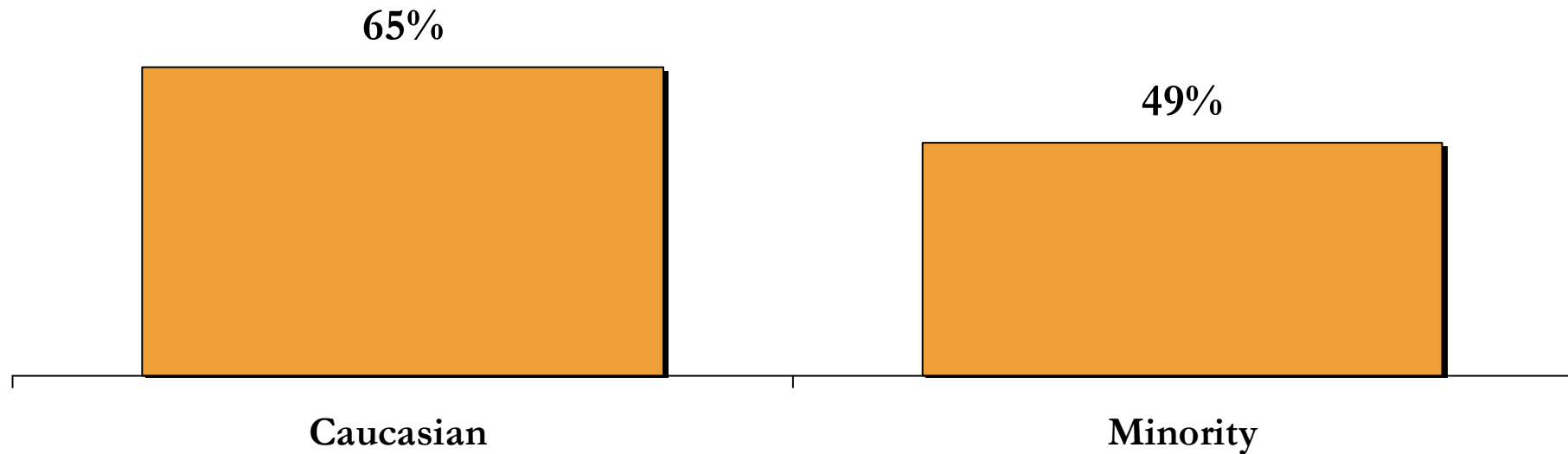


Minority

Statewide Average: 82% of Ohio residents report using the Internet at home or someplace else.

Ohio Residents With Home Broadband Service

Percent of all Ohio residents who access broadband from home



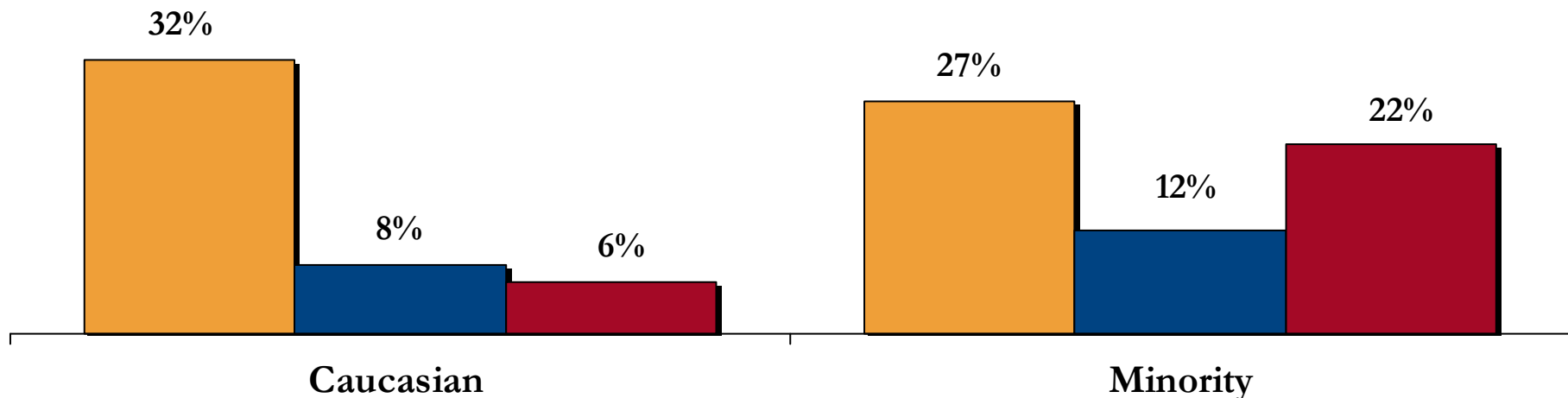
Statewide Average: 62% of all Ohio residents have home broadband service.

Q: Which of the following describe the type of Internet service you have at home?
(n=1,200 OH residents)
2009 © Connect Ohio®

Most Popular Places for Ohio Residents to Access the Internet

Percent of all Ohio residents who access the Internet at the following locales

■ At work ■ At someone else's home ■ At the library





Q: At what locations do you have access to the Internet?
(n=1,200 OH residents)
2009 © Connect Ohio®

188
Do Not Copy Without Written Permission

Source: 2009 Connect Ohio® Statewide
Residential Technology Assessment
www.connectohio.org

Searching for Information Online

Percent of Ohio Internet users who search for the following types of information online

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Caucasian	Minority
Product or service information	64%	55%
Health or medical information	51%	40%
Information about events in your community	44%	41%
Research for schoolwork	36%	43%
Information about government services	36%	38%
Jobs or employment	31%	51%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of information have you used the internet to look for online?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Communicating Online

Percent of Ohio Internet users who communicate with others in the following ways

		Caucasian	Minority
Percentage is significantly* <i>higher</i> than the state average:			
Percentage is significantly* <i>lower</i> than the state average:			
E-mail		86%	77%
Instant messages		23%	35%
Posting content to a website		19%	24%
Chatting in chat rooms		6%	12%
Posting content to a blog		9%	11%
Social or professional networking sites such as Facebook		35%	39%
Microblogs such as Twitter		5%	9%



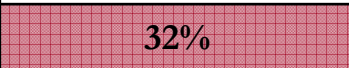
*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following ways of communicating with others have you used?
(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Interacting Online

Percent of Ohio Internet users who interact with the following individuals or organizations

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Caucasian	Minority
Friends or family	76%	71%
Companies with which you do business	43%	 32%
Co-workers	39%	38%
Health insurance company	25%	20%
Teachers	23%	27%
Ohio state government	21%	22%
Doctors or healthcare professionals	20%	18%
Local government	17%	15%
Elected officials	13%	15%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of individuals or organizations have you interacted with online, by visiting a website or communicating online to obtain information?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Online Transactions

Percent of Ohio Internet users who conduct the following transactions online

		Caucasian	Minority
Percentage is significantly* <i>higher</i> than the state average:			
Percentage is significantly* <i>lower</i> than the state average:			
Purchasing a product or service online		53%	39%
Booking travel arrangements		28%	22%
Paying bills		52%	46%
Online banking		49%	42%
Online transactions with government		29%	28%
Selling a product or service online		12%	9%
Buying, selling, or trading investments		11%	7%

*significance measured at a 95% confidence level



Q: In the past 30 days, which of the following types of transactions have you completed online?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Online Activities

Percent of Ohio Internet users who conduct the following activities online

Percentage is significantly* <i>higher</i> than the state average: 	Caucasian	Minority
Percentage is significantly* <i>lower</i> than the state average: 		
Using a search engine	70%	64%
Sending or receiving photos	49%	38%
Reading newspapers or other news sources	59%	57%
Playing games online	38%	37%
Downloading music	31%	33%
Watching videos, movies, or TV shows online	32%	34%
Working from home	27%	26%
Reading blogs	22%	25%
Taking online classes	8%	15%



*significance measured at a 95% confidence level

Q: In the past 30 days, which of the following activities have you conducted online?
(n=964 OH residents who use the Internet)

2009 © Connect Ohio®

Barriers to Internet Adoption

Percent of Ohio residents who have no home Internet service for the following reasons

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Caucasian	Minority
I don't own a computer	54%	51%
I don't need the Internet	40%	28%
Too expensive	21%	28%
I can get Internet access somewhere else	12%	10%
Broadband isn't available, and I don't want dial-up	7%	5%
Concerns about fraud or identity theft	10%	11%

The lack of a home computer is the top barrier to Internet adoption among both caucasian and minority residents.



*Significance measured at a 95% confidence level

Q: Why don't you subscribe to the Internet at home?

(n=300 OH residents with no Internet service in their household)

Internet Victimization

Percent of Ohio Internet users who have been victims of the following

Percentage is significantly* <i>higher</i> than the state average:  Percentage is significantly* <i>lower</i> than the state average: 	Caucasian	Minority
	Spam or junk e-mail	74%
Computer viruses or spyware	46%	41%
Credit card fraud	8%	7%
Identity theft	5%	5%
None of the above	19%	27%

*significance measured at a 95% confidence level

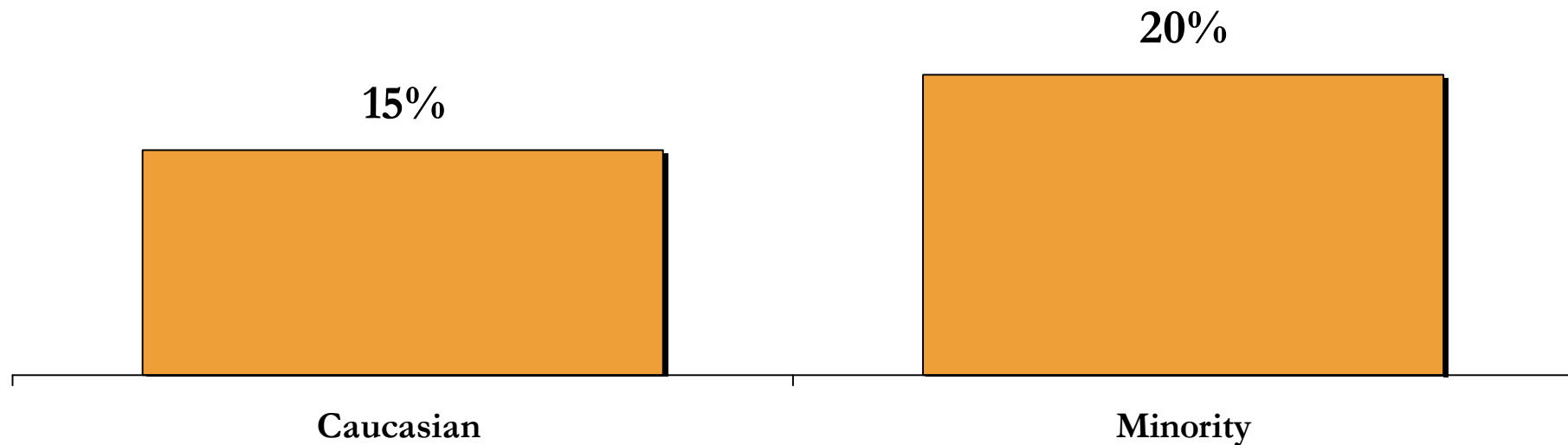
Q: Have you ever been a victim to any of the following [issues] through the Internet?

(n=964 OH residents who use the Internet)

2009 © Connect Ohio[®]

Home Telephone Calls Through a Broadband Connection (VoIP)

Among Ohio residents with home broadband service



Statewide Average: 15% of Ohio residents with home broadband service say they make or receive home telephone calls through their broadband connection (VoIP).

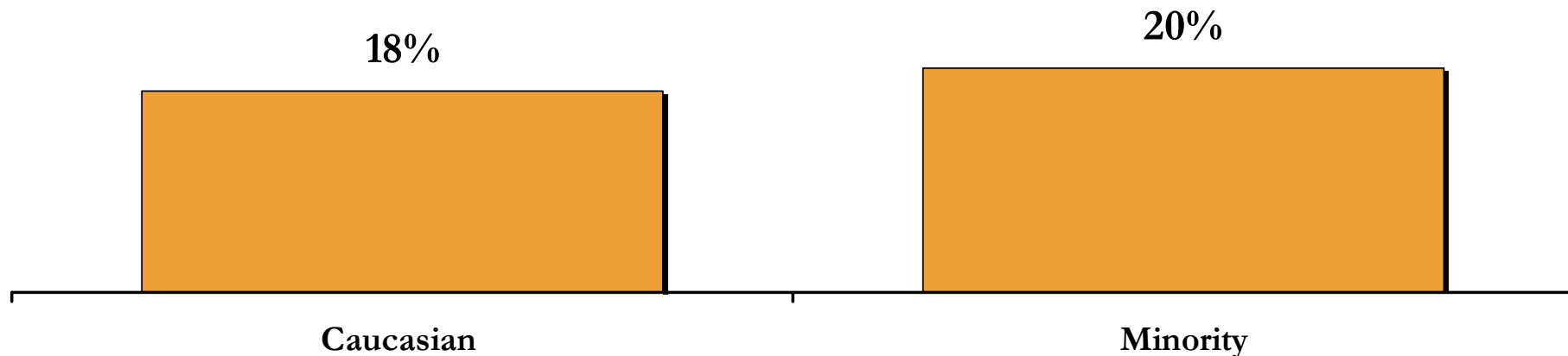
Q: Do you make or receive home telephone calls through your Internet connection?

(n=733 OH residents with home broadband service)

2009 © Connect Ohio[®]

Likely to Pay an Extra \$10 Per Month to Double Broadband Speeds

Percent of Ohio broadband subscribers who would be likely to upgrade their speed for \$10 more a month





Statewide Average: 18% of Ohio broadband subscribers would be likely to pay \$10 more a month for broadband speeds that are twice as fast as their current service.

Q: Would you be likely to subscribe to a broadband service that was twice as fast as your current connection speed for an additional ten dollars per month above what you are paying now?
(n=733 OH residents with broadband service at home)
2009 © Connect Ohio®

Why Ohio Residents Subscribe to Broadband

Percent of Ohio residents who subscribe to broadband for the following reasons

	Caucasian	Minority
Percentage is significantly* <i>higher</i> than the state average: 		
Percentage is significantly* <i>lower</i> than the state average: 		
Realized broadband was worth the extra money	42%	28%
Broadband became available in my area	31%	26%
Got a computer for the home	36%	28%
Broadband costs have gone down	39%	27%
I needed to conduct business online	23%	18%
I heard about the benefits of broadband	24%	14%
Friends or family convinced me	16%	19%

*Significance measured at a 95% confidence level

Q: Which of the following contributed to your decision to subscribe to broadband service?

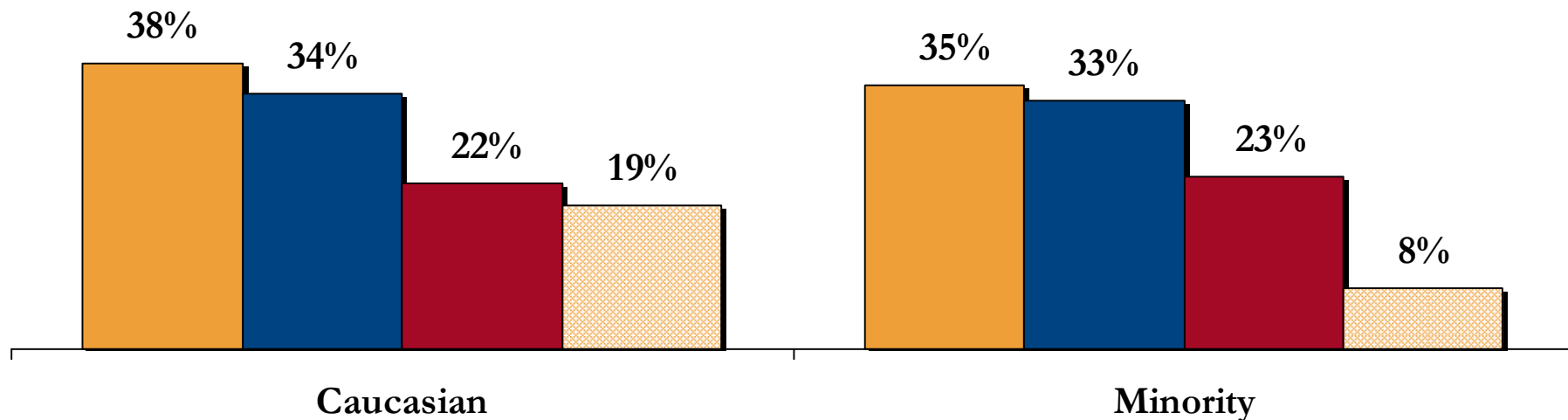
(n=733 OH residents with broadband service at home)

2009 © Connect Ohio®

Top Barriers to Broadband Adoption

Percent of Ohio residents who choose not to subscribe to broadband

- Don't need broadband or don't understand the benefit
- Don't own a computer
- Broadband is too expensive
- Broadband is not available where I live

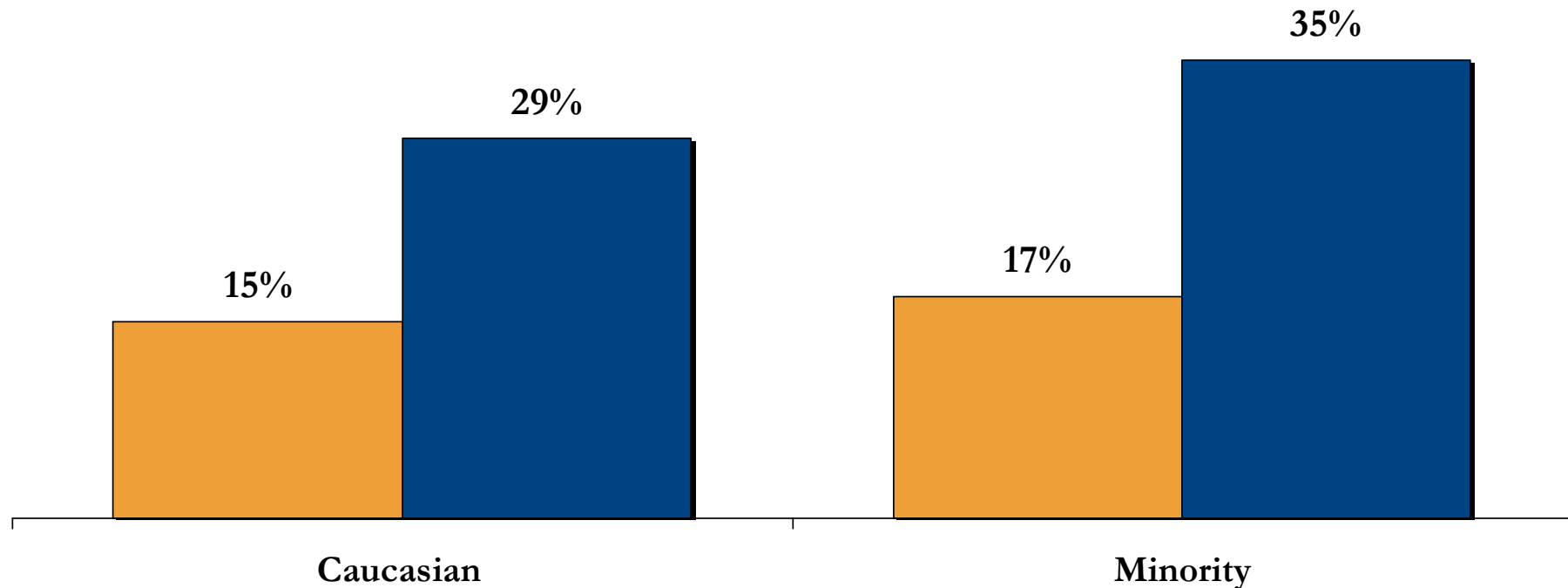


Lack of a computer and a perceived lack of need for home broadband service are the top barriers to broadband adoption among both white and minority residents.

Ohio Residents and Telework

Among Ohio adults employed full- or part-time

■ Telework via the Internet ■ Do not telework, but would if employer allowed it



Q: Do you ever work from home related to your job or self employment? And

Q: Would you be interested in teleworking if your employer allowed it?

(n=688 OH residents employed full- or part-time)

200

2009 © Connect Ohio®

Do Not Copy Without Written Permission

Source: 2009 Connect Ohio® Statewide Residential Technology Assessment

www.connectohio.org

Research Methodology

Methodology

- **Data were collected by telephone through live computer-assisted interviews from a statewide random digit dial (RDD) sample of 1,200 households contacted between April 10 and April 27, 2009. Data were collected by Thoroughbred Research Group of Louisville, Kentucky. www.torinc.net**
 - This research was designed to update the state-level benchmarks that were established by the benchmark survey completed in March 2008
- **The questionnaire screened to include only adults age 18 or older with quotas set by gender and age to ensure adequate representation of all adults in the state.**
- **Weights were applied to correct for minor variations and ensure that the sample matches the most recent U.S. Census estimates of the state's population by age and gender. Weighting and research consultation were provided by Lucidity Research LLC. www.lucidityresearch.com**
- **Sampling margin of error (adjusted):**
 - Statewide, full sample (n=1,200): $\pm 2.89\%$ at the 95% level of confidence. This sample error accounts for sample weighting, using the effective sample size.

Urban-Rural Classifications Defined

- **The U.S. Census Bureau uses an urban-rural classification based on Metropolitan Statistical Areas (MSAs), which are designated by the United States Office of Management and Budget to collect, tabulate and publish federal statistics.**
- **Metropolitan statistical areas contain a core urban area with a population of 50,000 or more. Each MSA also includes one or more counties that have a high degree of social and economic interaction with the urban core (further information on definitions for MSAs can be found at: www.census.gov/population/www/estimates/00-32997.pdf).**
- **When classifying urban, suburban and rural counties, Connect Ohio follows the Census Bureau definition whereby counties are categorized as “urban” if they contain the core city of an MSA. “Suburban” counties are MSA counties that do not contain a core city, and “rural” counties include all remaining counties that are not part of any MSA.**
- **Using these definitions, there are currently 14 urban, 26 suburban, and 48 rural counties in Ohio.**

State Sample Profile (n=1,200)

Gender:		Age:		Any children under age 18 in household	40%
Male	48%	34 or younger	29%	Average household size (# of persons)	2.9
Female	52%	35 to 44	18%	Children covered by health insurance	94%
Marital Status:		45 to 54	20%	Employment Status:	
Single, never married	12%	55 to 64	15%	Employed full-time	48%
Married/partnered relationship	68%	65 or older	18%	Employed part-time	11%
Separated or divorced	11%	Mean age (years)	47	Retired	18%
Widowed	8%	Median age (years)	46	Unemployed	7%
No answer/refused	1%	Household Income:		Homemaker not employed outside home	6%
Educational Attainment:		Under \$25,000	18%	Student not working for wages	2%
Less than high school	8%	\$25,000 to \$49,999	23%	Disabled, not employed outside the home	5%
High school graduate	33%	\$50,000 to \$74,999	18%	Other / no answer	3%
Some college	25%	\$75,000 or higher	24%	Mean household income (\$000)	\$71.0
College graduate or higher	33%	No answer/refused	17%	Median household income (\$000)	\$51.3



Contact Information

Tom Fritz

Executive Director of Connect Ohio®

tfritz@connectohio.org

www.connectohio.org

(866) 881-9424