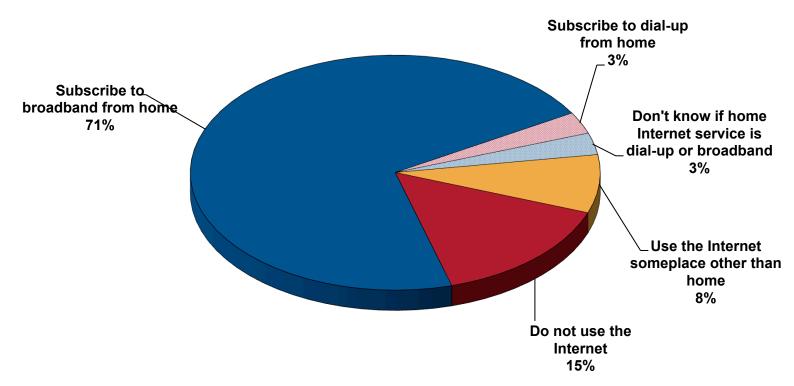


2012 Connect Ohio Residential Technology Assessment Results



Ohio Technology Adoption Summary

Percent of all Ohio residents



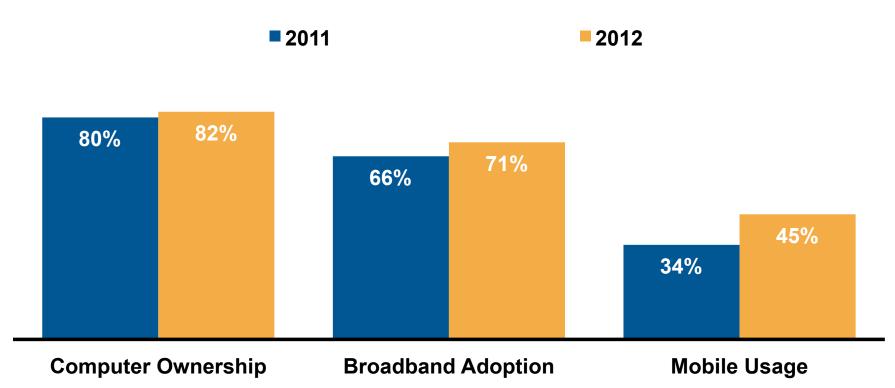
Q: Do you have an Internet connection at home?,

Q: Do you have access to the Internet from any locations outside of your own home? and

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



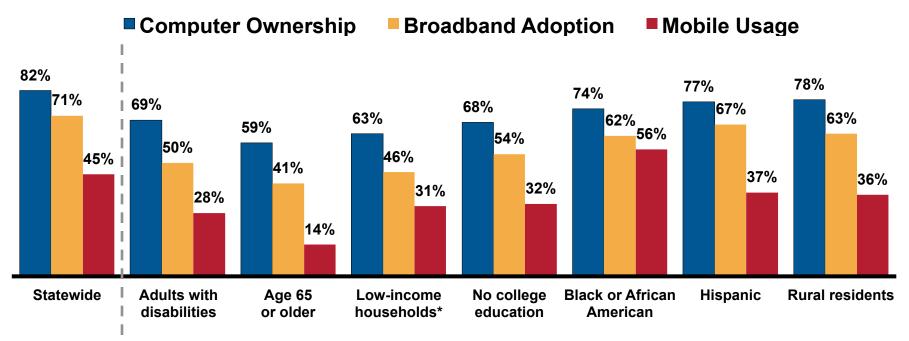
Ohio Technology Adoption Trends



- Q: Does your household have a computer?
- Q: Which of the following describe the type of Internet service you have at home?
- Q: When you are at your home, which of the following devices do you use to access the Internet? and
- Q: At what locations outside of your home do you use the internet? and
- 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: How often, if ever, do you go online using your cell phone? (n=1,200 OH residents in 2012 and n=1,201 OH residents in 2011)



Technology Adoption by Demographic



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

- Q: Does your household have a computer?
- Q: Which of the following describe the type of Internet service you have at home?
- Q: When you are at your home, which of the following devices do you use to access the Internet? and
- Q: At what locations outside of your home do you use the internet? and
- 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: How often, if ever, do you go online using your cell phone?

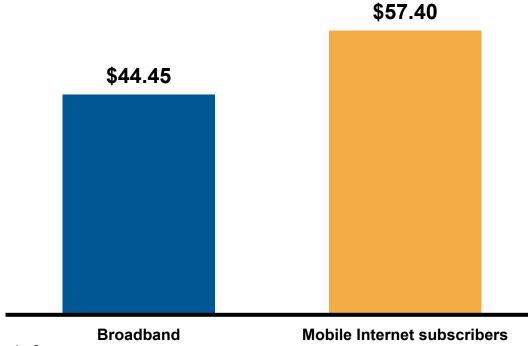
(n=1,200 OH residents; for the Hispanic sample, n=43 OH residents who identify themselves as of Hispanic, Latino, or Spanish origin, including 30 respondents who were contacted as part of an oversample survey of Hispanic residents in Ohio)



Average Monthly Price Paid for Broadband and Mobile Services by Ohio Residents

Average price paid for service

Ohio broadband subscribers pay an average of \$44.45 per month for their home broadband service, nearly \$13 less per month than Ohio mobile Internet subscribers pay for service.



Q: What do you pay each month for your Internet service?

Q: What do you pay each month for the mobile Internet service for your cell phone?

(n=807 OH residents with broadband service at home and 457 OH residents who subscribe to a data plan that allows Internet access on a cell phone)

Source: 2012 Connect Ohio Residential Technology Assessment www.connectohio.org

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subscribers



Ohio Residents With Home Broadband Service

Percent of all Ohio residents who subscribe to home broadband service



Statewide, 71% of all Ohio residents subscribe to home broadband service. This translates to approximately 2.6 million adults without broadband service at home.

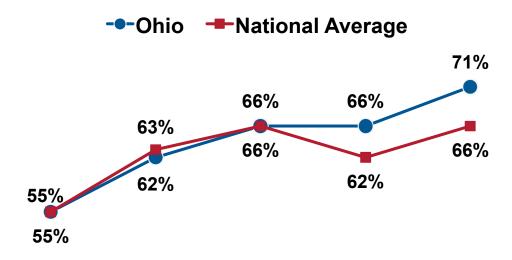
Q: Which of the following describe the type of Internet service you have at home? (n=1,200 OH residents)



State and National Trends in Residential Broadband Adoption

Statewide, home broadband adoption among Ohio residents increased 16 percentage points from 2008 to 2012, compared to a national increase of 11 percentage points.

Percent of all residents with broadband service at home



2008 2009 2010 2011 2012

Source: 2008-2012 Connect Ohio Residential Technology Assessments

www.connectohio.org

National Source: Pew Internet & American Life Project, *Trend Data (Adults), Home Broadband Adoption,* Released April 2012.

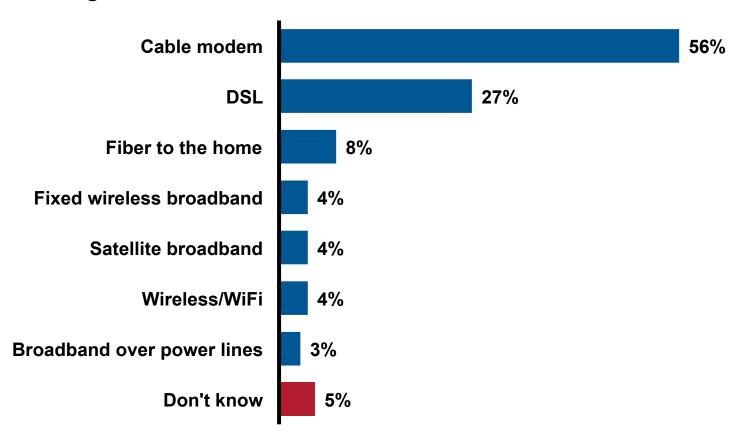
http://pewinternet.org/Trend-Data-(Adults)/

Q: Which of the following describe the type of Internet service you have at home? (n=1,200 OH residents in 2008; 1,200 OH residents in 2009; 1,200 OH residents in 2010; 1,201 OH residents in 2011; and 1,200 OH residents in 2012)



Types of Broadband Service That Ohio Residents Use

Among Ohio residents with a broadband connection at home*

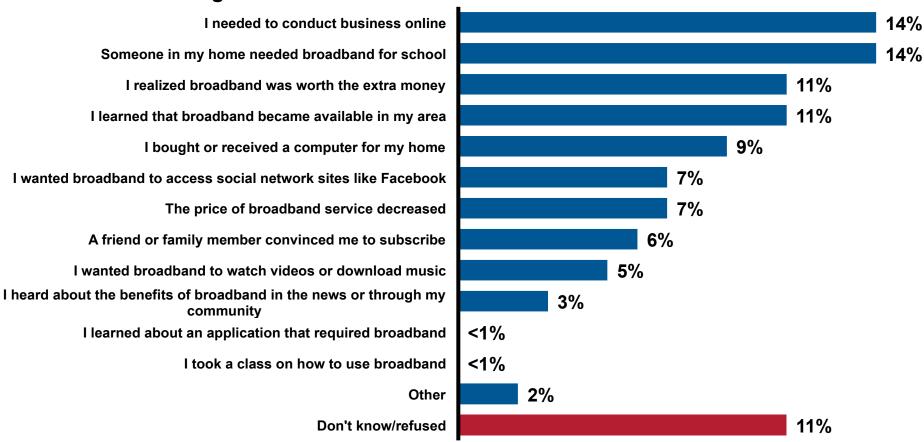


^{*}Percentages do not add up to 100% because respondents could give multiple responses. Q: Which of the following describes the broadband service you have at home? (n=807 OH residents with broadband service at home)



Main Reason Why Ohio Residents Subscribe to Broadband

Among Ohio residents with a broadband connection at home

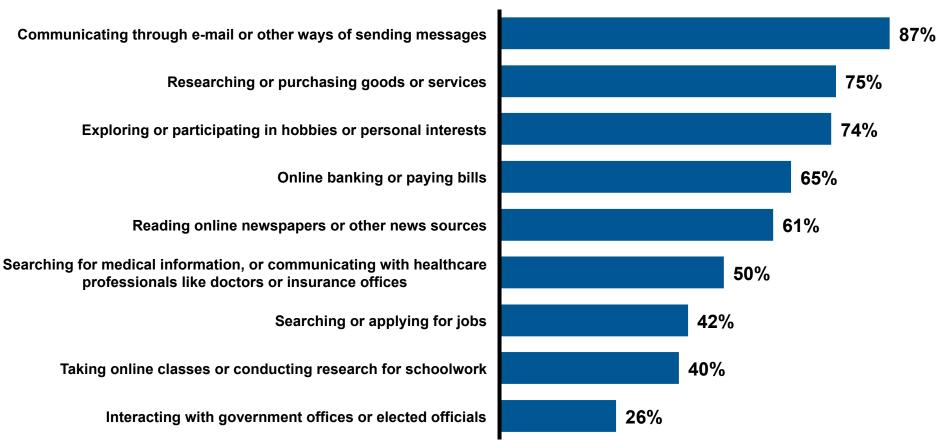


Q: Which one of these was the main reason why you decided to subscribe to home broadband service? (n=807 OH residents with broadband service at home)



Online Activities

Percent of Ohio Internet users who conduct following activities online

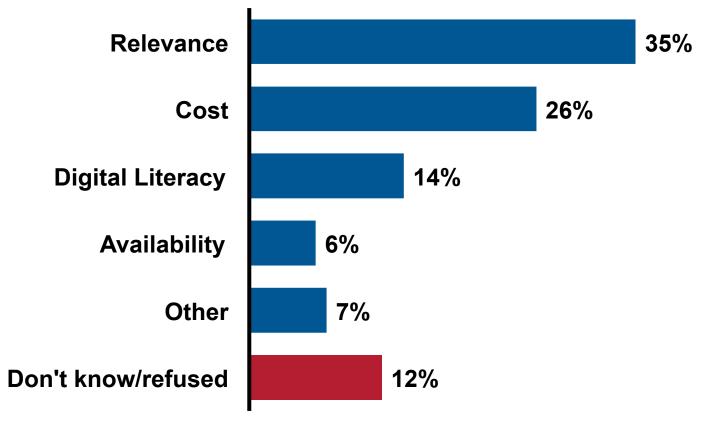


Q: Which of the following activities do you conduct using the Internet? (n=931 OH Internet users)



Main Barriers to Broadband Adoption

Among residents who do not subscribe to home broadband service



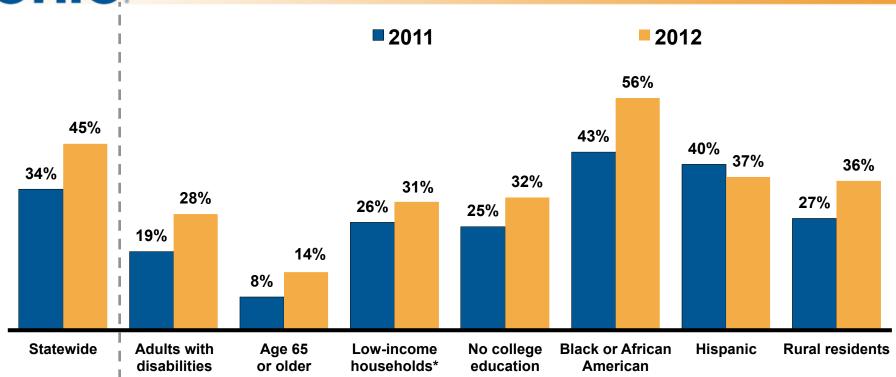
Q: Which one of these is the main reason why you do not subscribe to home Internet service?

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

Q: Which one of these is the main reason why you do not subscribe to home broadband service? (n=393 OH residents without broadband service at home)



Mobile Usage Trends by Demographic



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

(n=1,200 OH residents and n=1,201 Ohio residents in 2011; for the Hispanic sample in 2012, n=43 OH residents who identify themselves as of Hispanic, Latino, or Spanish origin, including 30 respondents who were contacted as part of an oversample survey of Hispanic residents in Ohio)

Q: When you are at your home, which of the following devices do you use to access the Internet? and

Q: At what locations outside of your home do you use the internet? and

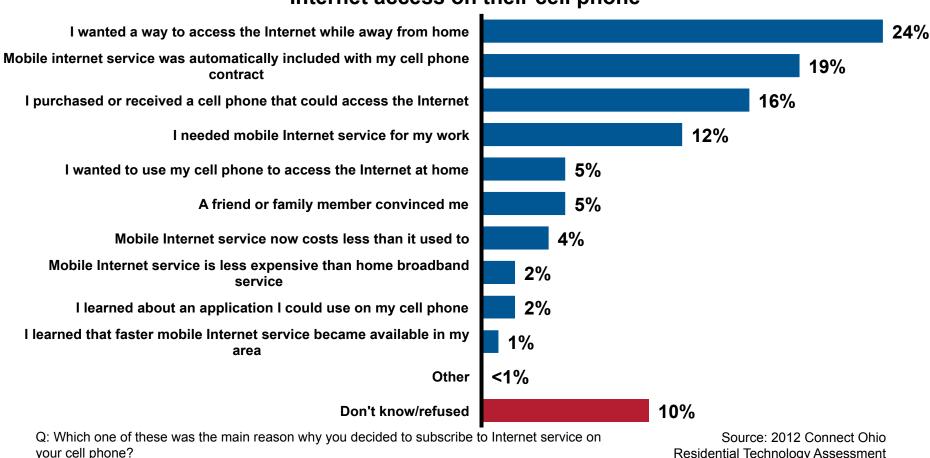
Q: On your laptop computer, do you subscribe to mobile wireless service that allows you to access the Internet through a cellular network? and

Q: How often, if ever, do you go online using your cell phone?



Why Ohio Residents Subscribe to Mobile Broadband

Among Ohio residents who subscribe to a data plan that allows Internet access on their cell phone



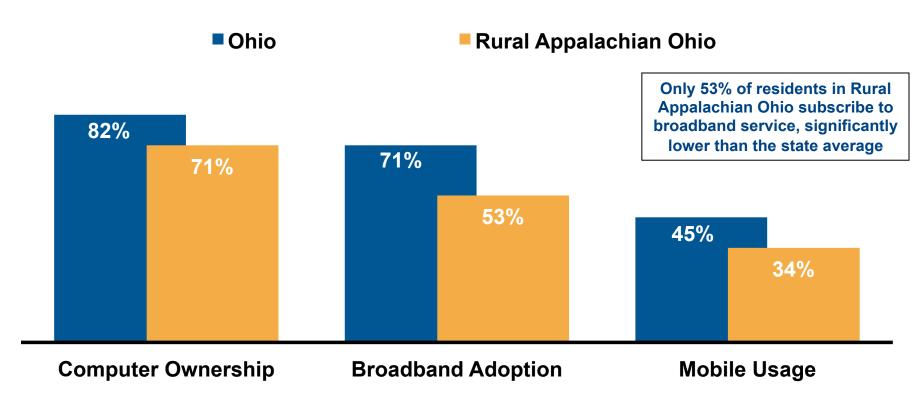
2012 © Connect Ohio.

(n=457 OH residents who subscribe to a data plan that allows Internet access on cell phone)

Residential Technology Assessment www.connectohio.org



Technology Adoption Rural Appalachian Ohio



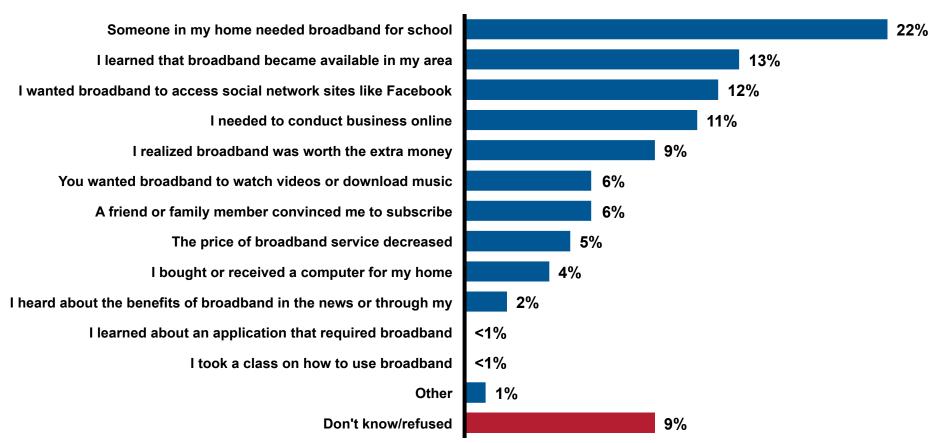
- Q: Does your household have a computer?
- Q: Which of the following describe the type of Internet service you have at home?
- Q: When you are at your home, which of the following devices do you use to access the Internet? and
- Q: At what locations outside of your home do you use the internet? and
- 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: How often, if ever, do you go online using your cell phone? (n=1200 OH residents and n=407 residents in Rural Appalachian OH)

Source: 2012 Connect Ohio Residential Technology Assessment www.connectohio.org



Why Rural Appalachian Ohio Residents Subscribe to Broadband

Among residents with a broadband connection at home

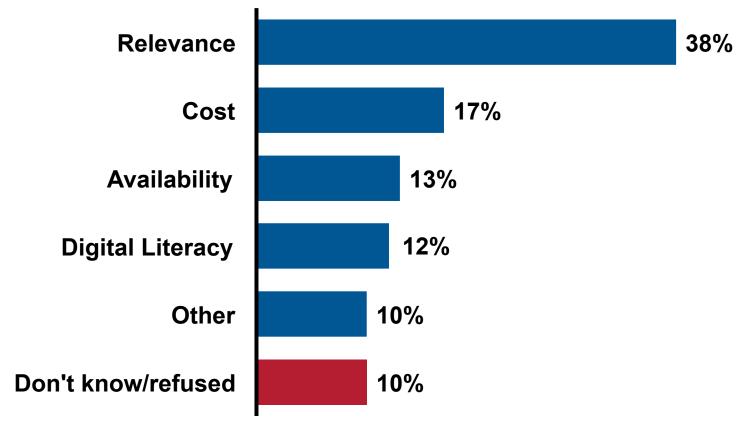


Q: Which of the following contributed to your decision to subscribe to broadband service? (n=230 Rural Appalachian OH residents with broadband service at home)



Main Barriers to Broadband Adoption in Rural Appalachian Ohio

Among residents who do not subscribe to home broadband service



Q: Which one of these is the main reason why you do not subscribe to home Internet service?

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

Q: Which one of these is the main reason why you do not subscribe to home broadband service? (n=177 Rural Appalachian OH residents without broadband service at home)



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 September 22 and October 13, 2012. On average, each survey took approximately 11 minutes to complete. Data were collected by Thoroughbred Research Group in Louisville, KY.
 - This research was designed to measure technology adoption trends and the awareness of available broadband service, and to determine factors that contribute to individuals choosing whether or not to subscribe to broadband service.
- The questionnaire screened to include only residents age 18 or older with quotas set by gender, age, and county of residence (to ensure that a sufficiently large sample of adult heads of households in rural Appalachian counties was achieved, these households were oversampled). 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, gender, and the respondent's county of residence (whether or not the respondent lives in a rural Appalachian county). Weighting and research consultation were provided by Lucidity Research LLC.
- Sampling margin of error:
 - Based on the effective sample size, the effective post-weighting margin of error =
 ±3.41% at a 95% level of confidence for the statewide sample
- In addition, Connect Ohio oversampled adult heads of households who identified themselves as of Hispanic, Latino, or Spanish origin to ensure a large enough sample size of this demographic group for reporting purposes (n=43).



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, we follow 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 an MSA.
- Rural Appalachian Classification: Connect Ohio defines Rural Appalachian respondents as adults heads of households who live in Ohio counties that are under the jurisdiction of the Appalachian Regional Commission (ARC) but are not part of the Cincinnati, Cleveland, or Youngstown MSA's. This includes the following counties: Adams, Athens, Belmont, Carroll, Coshocton, Gallia, Guernsey, Harrison, Highland, Hocking, Holmes, Jackson, Jefferson, Lawrence, Meigs, Monroe, Morgan, Muskingum, Noble, Perry, Pike, Ross, Scioto, Tuscarawas, Vinton, and Washington.