

Broadband Residential Survey

Tampa Bay Regional Planning Council



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Introduction

Purpose

- Since broadband is the indispensable infrastructure of the 21st century economy, the purpose of this survey is to gain an accurate idea of current and future broadband (high speed internet) needs in order to plan for future broadband improvements.

Methodology

- Population definition
 - All households in Polk, Charlotte, Lee, Collier, DeSoto, Glades, Hardee, Highlands, and Okeechobee counties
 - Person most knowledgeable about home internet use
- Sampling frame
 - All working residential telephone numbers (landline & cell)
- Sample size
 - 750 in total study
 - 250 in Polk County
 - 250 in Charlotte, Lee, Collier counties
 - 250 in DeSoto, Glades, Hardee, Highlands, and Okeechobee counties
- Sampling error (given a 95% confidence interval)
 - 3.6% points in total study
 - 6.2% points in Polk County
 - 6.2% points in Charlotte, Lee, Collier counties
 - 6.2% points in DeSoto, Glades, Hardee, Highlands, and Okeechobee counties
- Data collection
 - Telephone interviews conducted from Kerr & Downs Research's office using CATI system
 - Conducted in May 2012

Executive Summary

Nearly 4 out of 5 homes (78%) have internet service

- Among homes with internet service
 - 90% have high speed internet
 - 3 out of 4 have a wireless router
 - The typical home has 2 devices connected to the internet
 - 38% of homes plan to connect another device to the internet in the coming year
 - 2 out of 3 homes believe that a high speed connection is very important

Executive Summary

Nearly 4 out of 5 homes (78%) have internet service

- Among homes with internet service
- 80% use the internet for entertainment
 - 60% use it at least daily for entertainment
- 68% use the internet for online shopping
 - 7% use it at least daily for online shopping
- 58% use the internet for online banking or paying bills
 - 17% use it at least daily for online banking or paying bills
- 54% use the internet for educational purposes
 - 28% use it at least daily for educational purposes
- 37% use the internet for business related tasks
 - 16% use the internet for business related tasks

Executive Summary

Among the 78% of homes with internet service

- %s of homes with internet service that will increase their internet use for various uses if they had faster connections:
 - 39% - entertainment
 - 28% - online shopping
 - 35% - online banking or paying bills
 - 34% - educational purposes
 - 28% - business related purposes
- 14% of homes have a home business
- 14% of homes have a telecommuter
- 31% of homes have someone who does business at home on a computer

Executive Summary

- \$ 48/month – typical internet connection cost
- 57% of homes have internet connection bundled with other services
- \$34/month – typical cost for unbundled internet connection

Executive Summary

22% of homes do not have internet service

- Among homes without internet service:
 - 12% are very likely to use the internet for online shopping
 - 24% are very likely to use the internet for education
 - 25% are very likely to use the internet for entertainment
 - 18% are very likely to use the internet for business tasks
 - 16% are very likely to use the internet for online banking or paying bills

Executive Summary

22% of homes do not have internet service

- Reasons for not having internet service:
- 25% - Do not need it at home
- 24% - Too expensive
- 15% - Too much money for what one gets in return
- 11% - Don't know much about computers

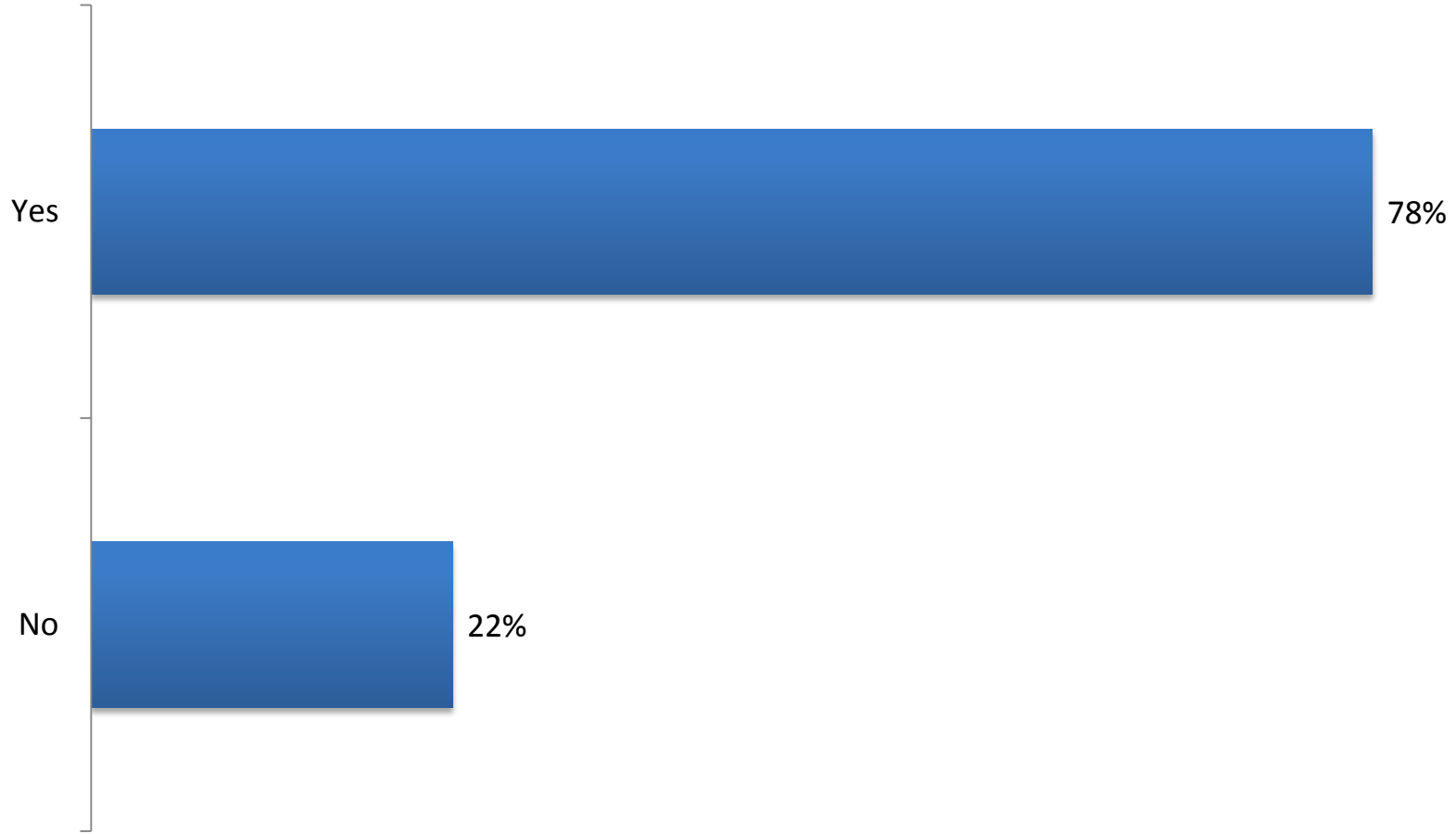
Executive Summary

Demographic profile of typical resident

- 3+ people per household (43%)
- No children under 18 (63%)
- 52 – median age
- Caucasian – 69%
- \$44,700 – median household income
- College degree (35%)
- Only a high school degree or less (41%)
- Female/male – 50%

Research Findings

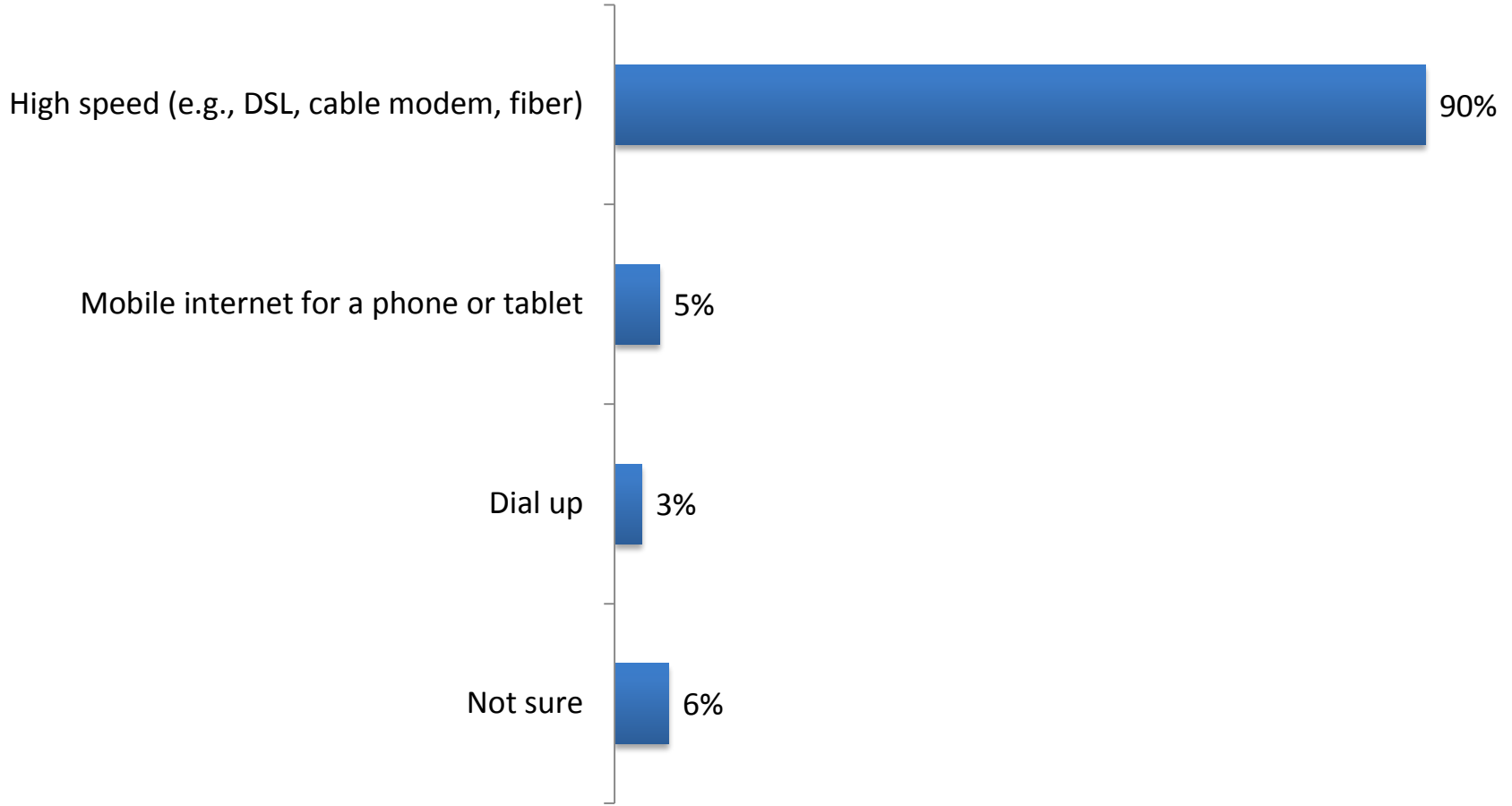
Internet service at home



Internet service at home

	Yes	No	Not sure
Total	78%	22%	0%
SW Florida	83%	17%	0%
Polk County	76%	24%	0%
RACEC	77%	23%	0%

Type of internet service*/**



*Base for this question and all other internet-related questions is 78% of total sample.

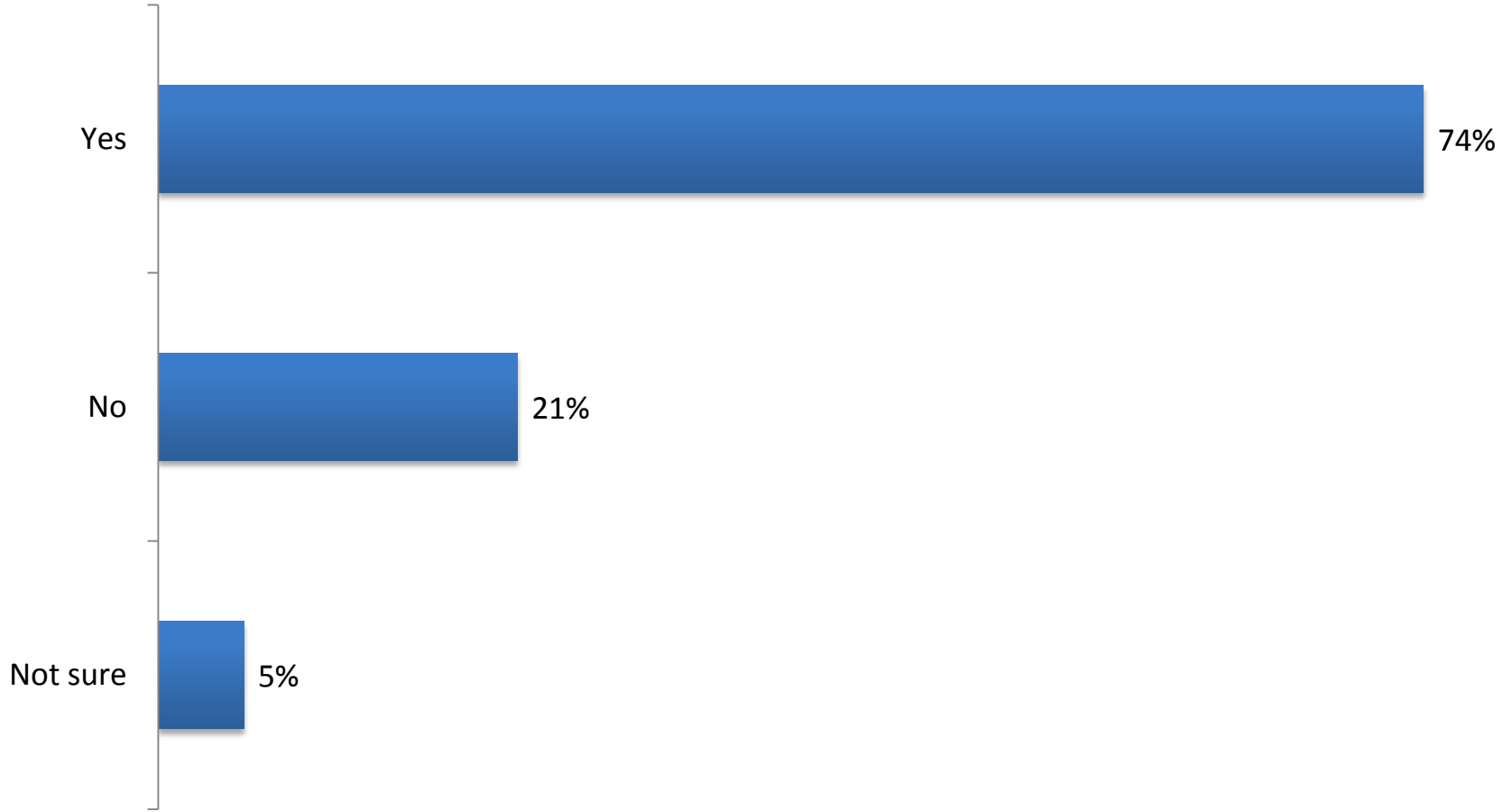
** Multiple responses permitted.

Type of internet service*

	High speed (e.g., DSL, cable modem, fiber)	Mobile internet for a phone or tablet	Dial up	Not sure	Other
Total	90%	5%	3%	6%	0%
SW Florida	90%	3%	2%	9%	0%
Polk County	87%	8%	3%	8%	1%
RACEC	93%	4%	3%	2%	0%

* Multiple responses permitted.

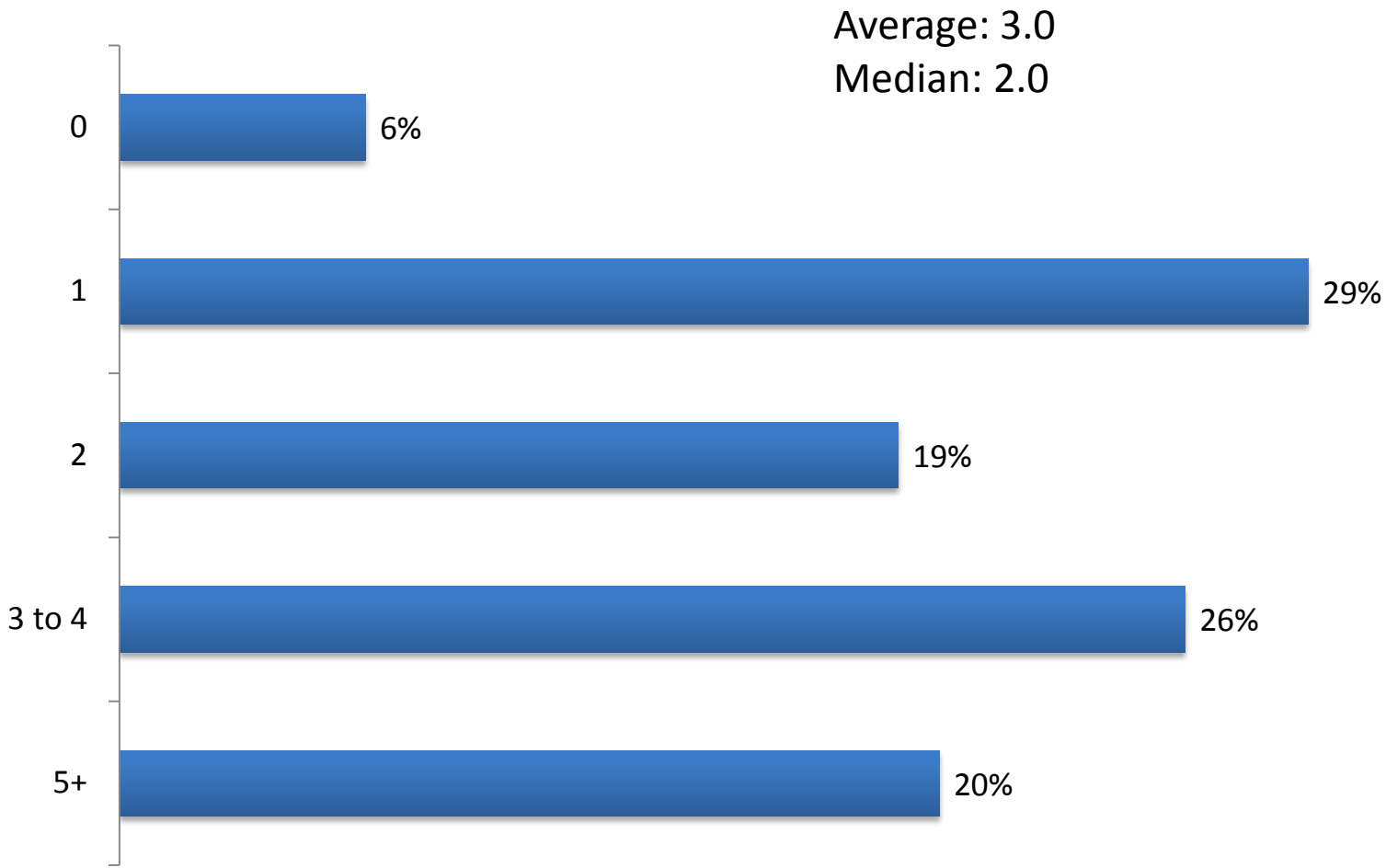
Wireless router



Wireless router

	Yes	No	Not sure
Total	74%	21%	5%
SW Florida	77%	20%	3%
Polk County	74%	16%	10%
RACEC	70%	27%	3%

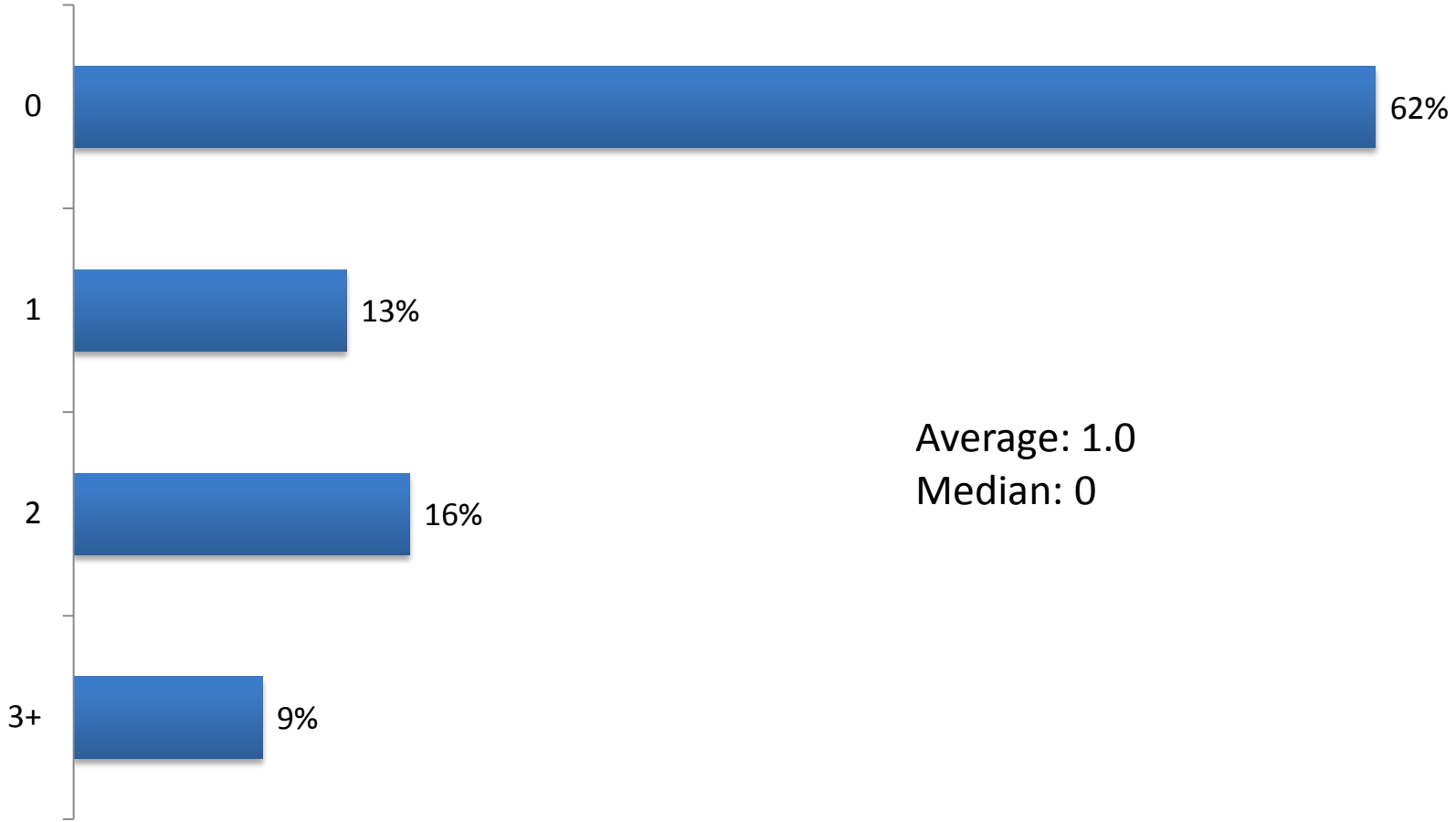
Number of devices that connect to the internet



Number of devices that connect to the internet

	0	1	2	3 to 4	5+
Total	6%	29%	19%	26%	20%
SW Florida	9%	27%	22%	25%	17%
Polk County	4%	26%	17%	28%	25%
RACEC	6%	33%	17%	26%	19%

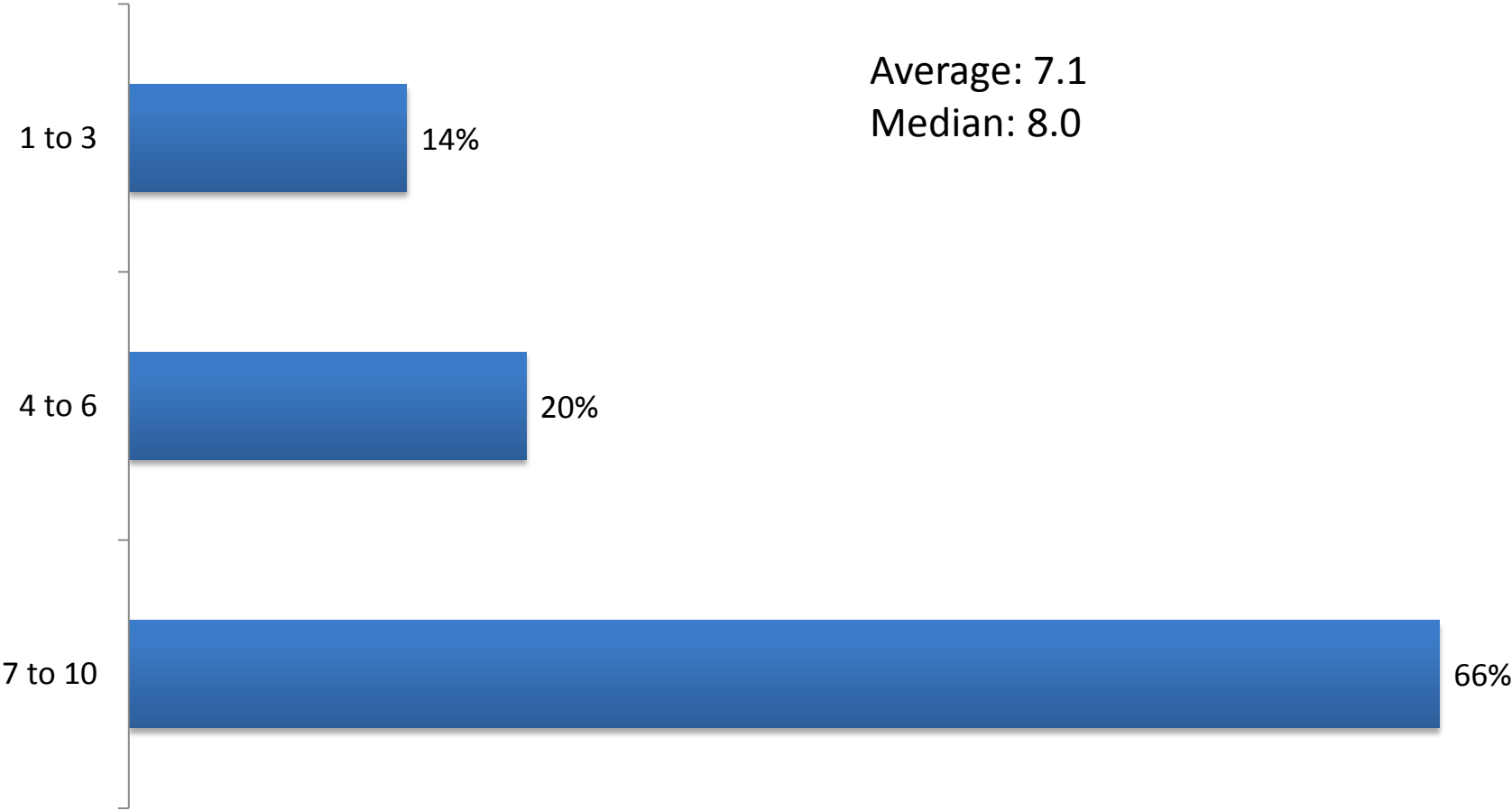
Number of devices that connect to the internet you plan to buy in the next year



Number of devices that connect to the internet you plan to buy in the next year

	0	1	2	3+
Total	62%	13%	16%	9%
SW Florida	68%	11%	14%	8%
Polk County	54%	17%	14%	14%
RACEC	64%	11%	20%	5%

Importance of high speed internet connection*



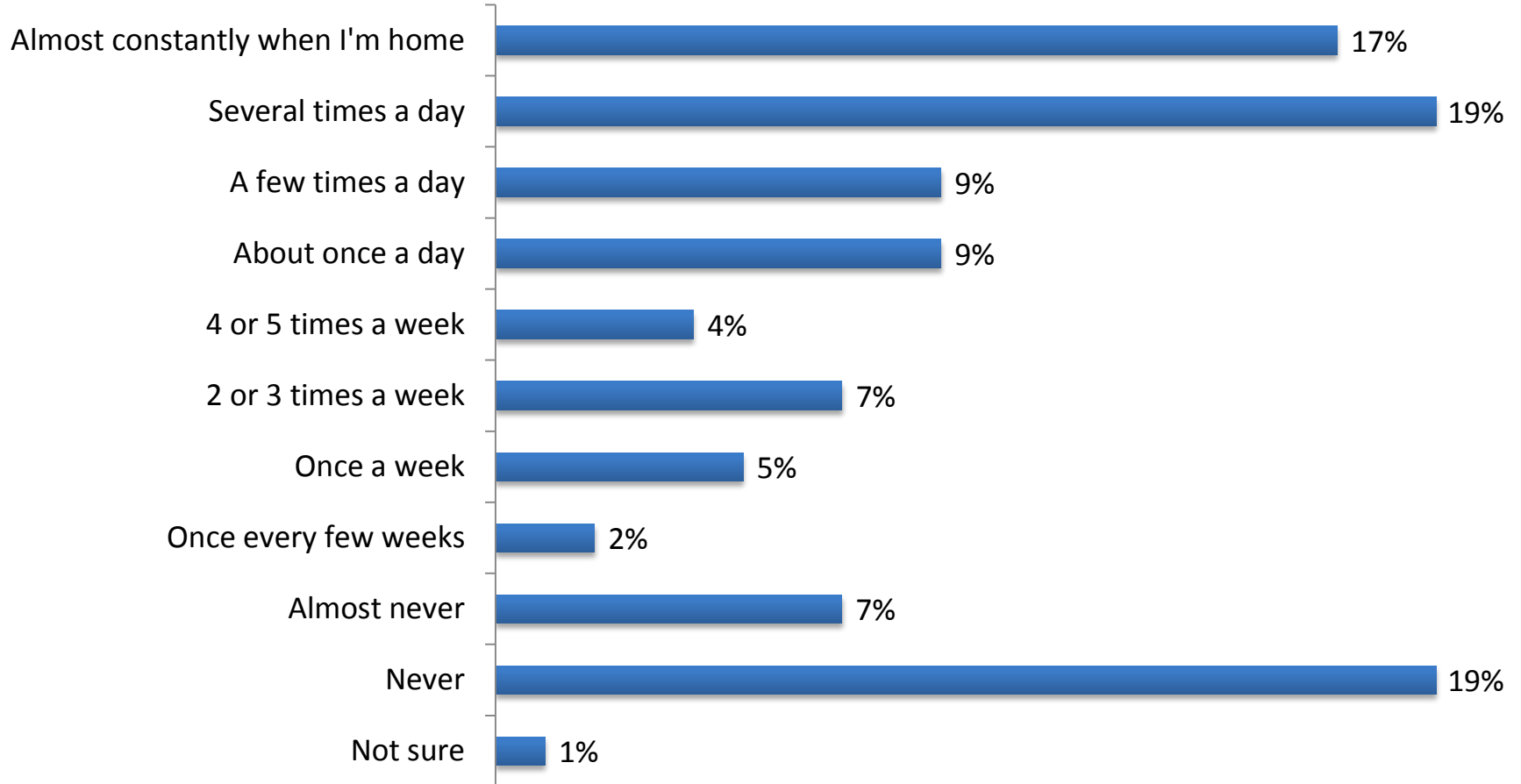
* 10 means you couldn't live without it, and 1 means no big deal.

Importance of high speed internet connection

	1 to 3	4 to 6	7 to 10
Total	14%	20%	66%
SW Florida	12%	18%	70%
Polk County	16%	18%	66%
RACEC	12%	26%	62%

* 10 means you couldn't live without it, and 1 means no big deal.

Frequency of individual's internet use for entertainment

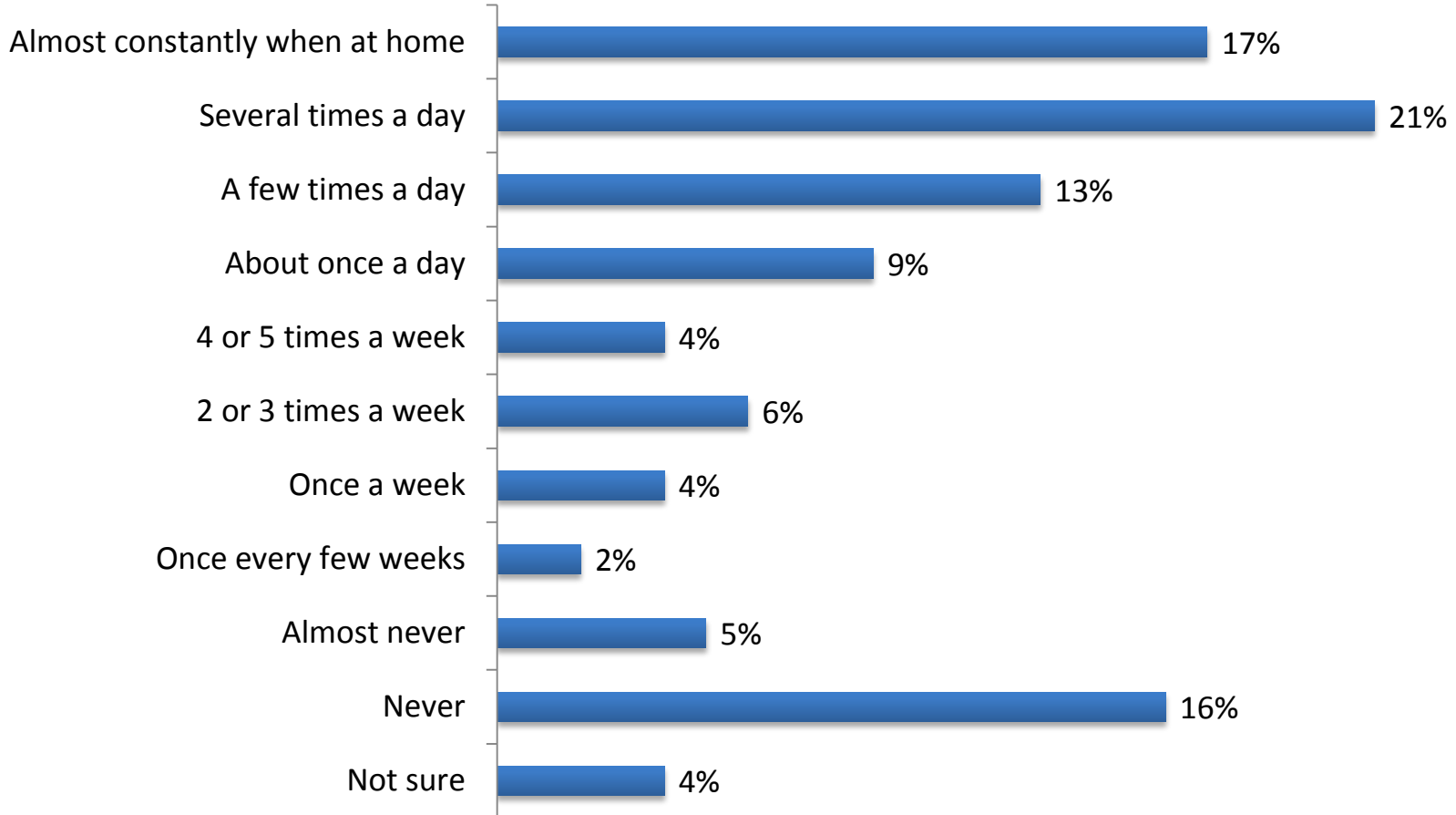


Median: About once a day.

Frequency of Individual's Internet use for Entertainment

	Almost constantly when I'm home	Several times a day	A few times a day	About once a day	4 or 5 times a week	2 or 3 times a week	Once a week	Once every few weeks	Almost never	Never	Not sure
Total	17%	19%	9%	9%	4%	7%	5%	2%	7%	18%	1%
SW Florida	21%	21%	10%	10%	6%	7%	4%	1%	9%	12%	0%
Polk County	16%	19%	13%	7%	5%	9%	6%	3%	4%	15%	4%
RACEC	14%	16%	4%	12%	1%	6%	5%	4%	7%	30%	0%

Frequency of all household members' internet use for entertainment

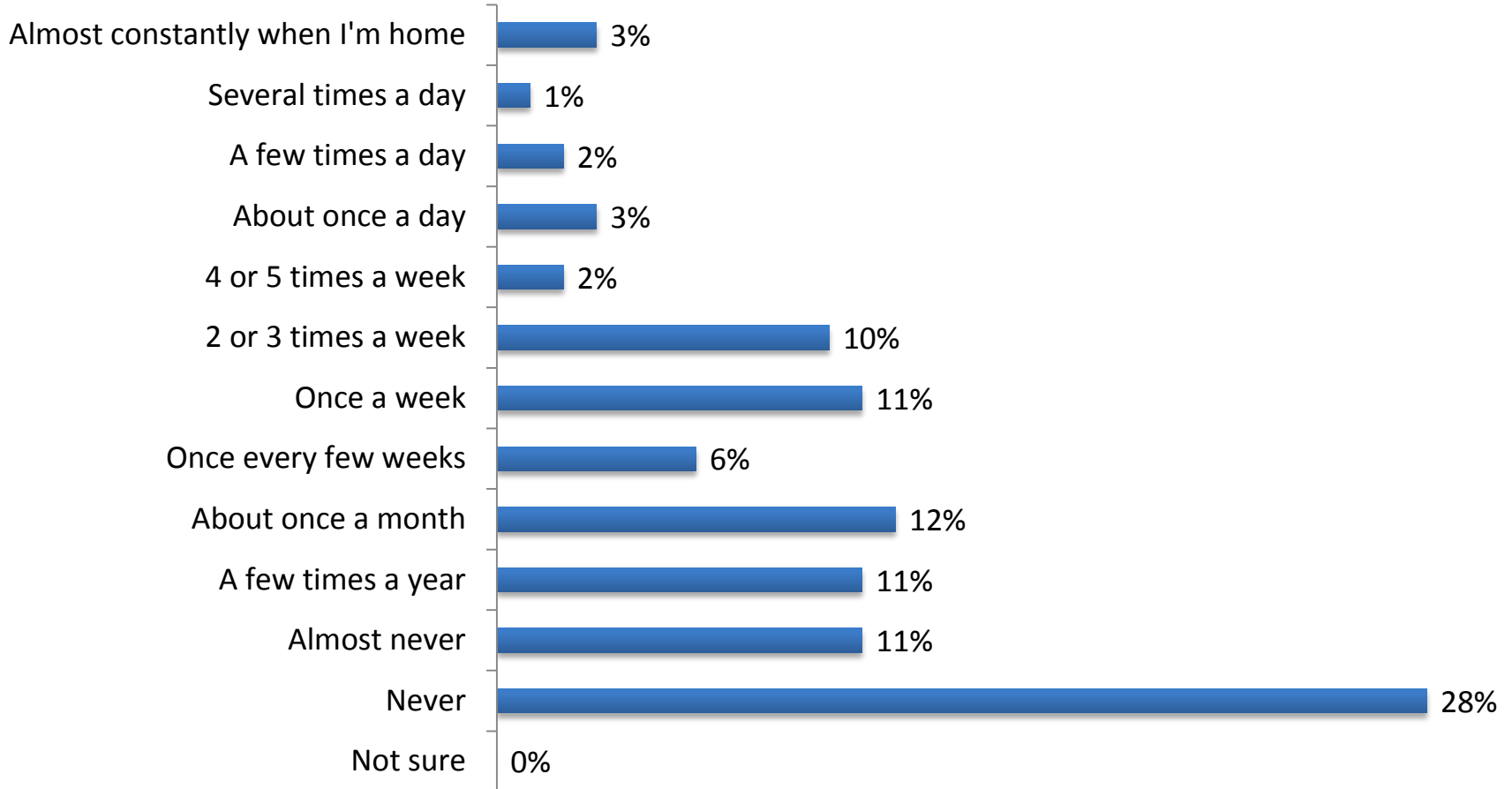


Median: A few times a day.

Frequency of all household members' internet use for entertainment

	Almost constantly when I'm home	Several times a day	A few times a day	About once a day	4 or 5 times a week	2 or 3 times a week	Once a week	Once every few weeks	Almost never	Never	Not sure
Total	17%	21%	13%	9%	4%	6%	4%	2%	5%	16%	4%
SW Florida	19%	25%	11%	9%	4%	6%	3%	2%	4%	16%	1%
Polk County	18%	24%	12%	7%	4%	6%	4%	0%	4%	10%	11%
RACEC	13%	12%	16%	12%	4%	5%	5%	3%	6%	25%	1%

Frequency of individual's internet use for online shopping

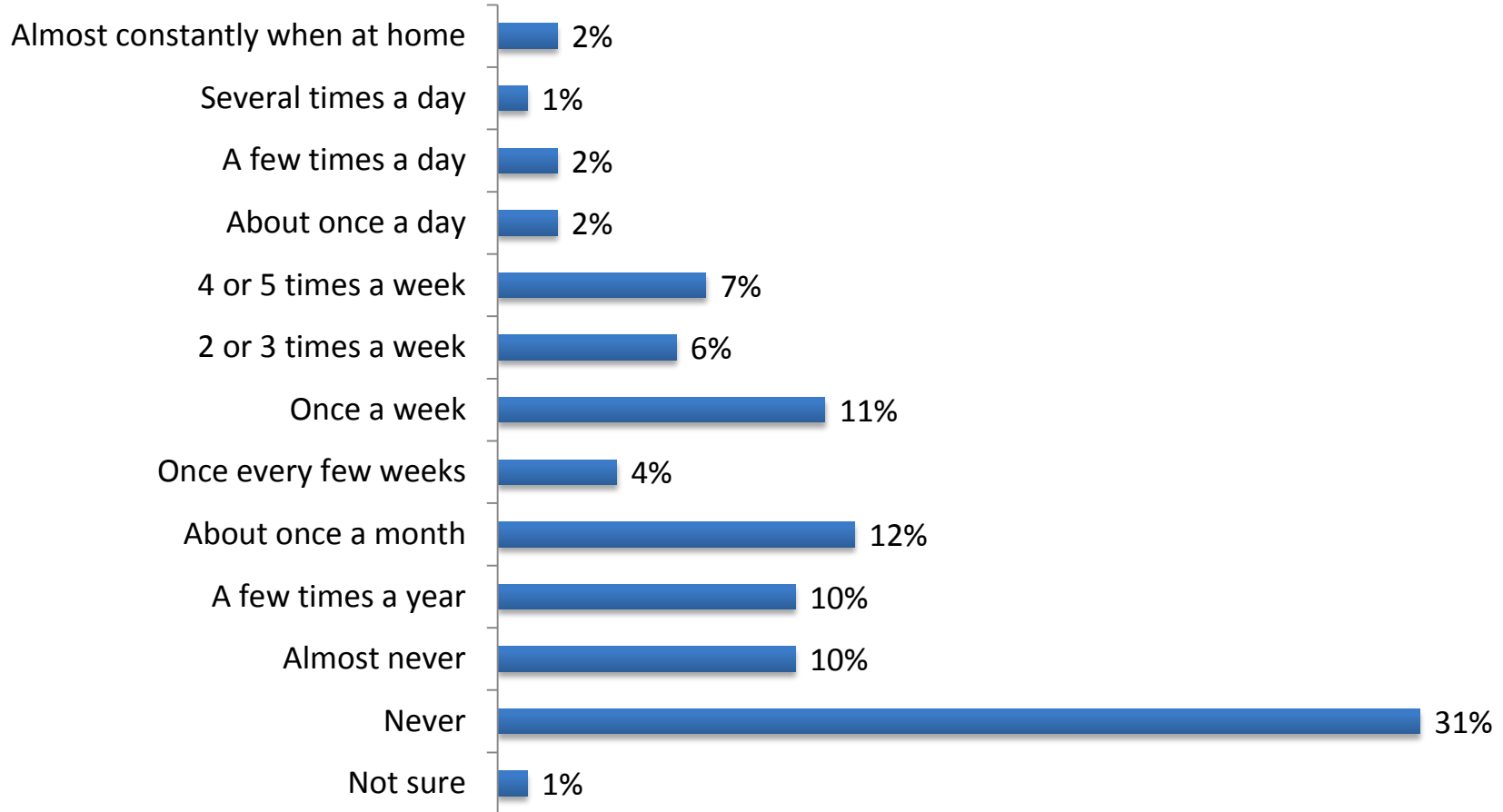


Median: About once a month.

Frequency of Individual's internet use for online shopping

	Almost constantly when I'm home	Several times a day	A few times a day	About once a day	4 or 5 times a week	2 or 3 times a week	Once a week	Once every few weeks	About once a month	A few times a year	Almost never	Never	Not sure
Total	3%	1%	2%	3%	2%	10%	11%	6%	12%	11%	11%	28%	0%
SW Florida	2%	2%	3%	4%	3%	9%	13%	4%	14%	11%	8%	29%	0%
Polk County	3%	1%	3%	3%	3%	8%	11%	7%	10%	13%	11%	27%	0%
RACEC	4%	1%	1%	1%	0%	12%	8%	8%	12%	11%	12%	29%	1%

Frequency of all household members' internet use for online shopping

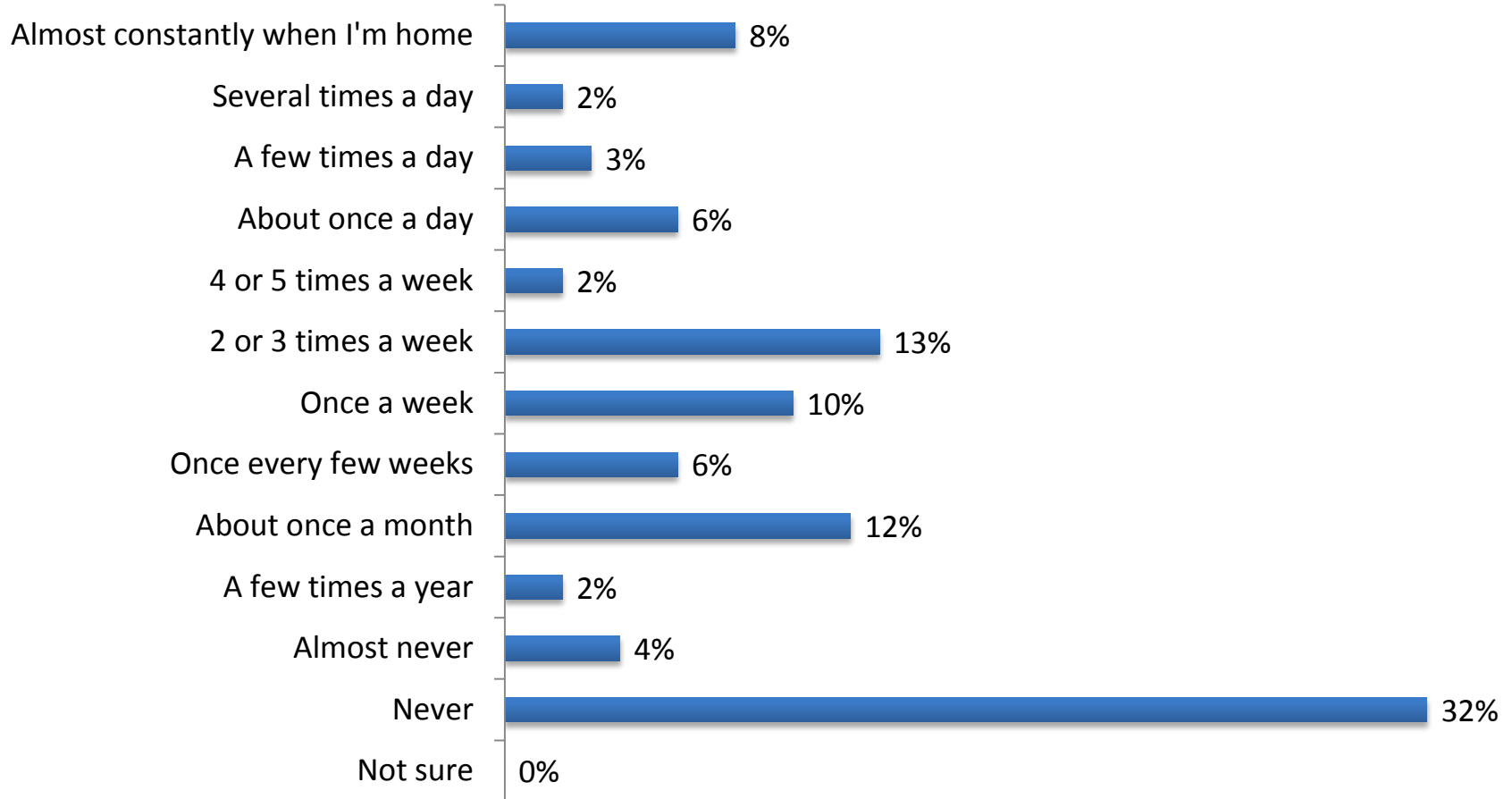


Median: About once a month.

Frequency of all household members' internet use for online shopping

	Almost constantly when I'm home	Several times a day	A few times a day	About once a day	4 or 5 times a week	2 or 3 times a week	Once a week	Once every few weeks	About once a month	A few times a year	Almost never	Never	Not sure
Total	2%	1%	2%	2%	7%	6%	11%	4%	12%	10%	10%	31%	1%
SW Florida	2%	2%	1%	3%	7%	5%	13%	5%	14%	10%	10%	29%	0%
Polk County	2%	0%	3%	3%	2%	9%	12%	2%	9%	11%	10%	36%	1%
RACEC	2%	2%	1%	1%	13%	4%	8%	5%	15%	8%	12%	30%	2%

Frequency of individual's internet use for online banking or paying bills

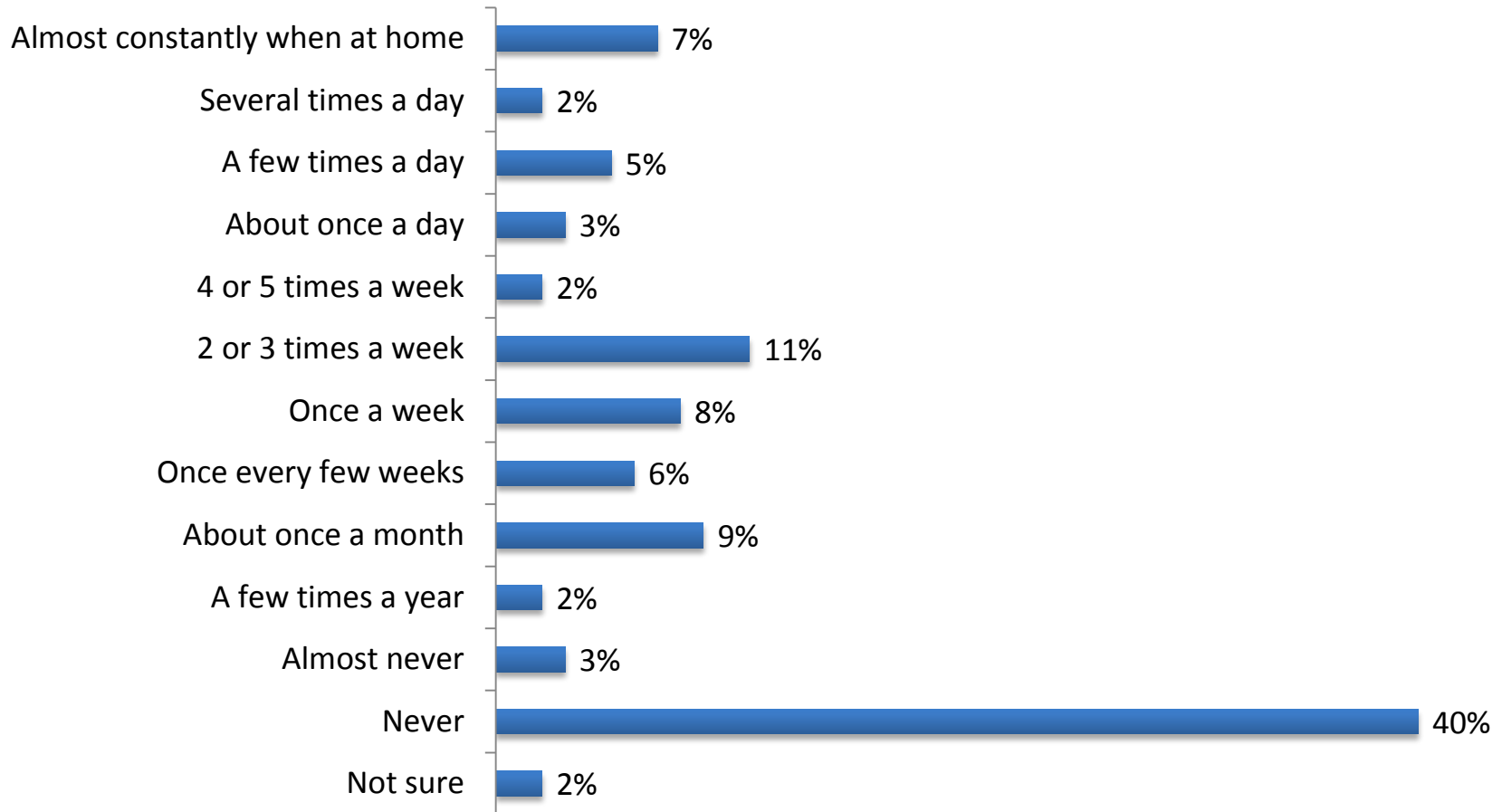


Median: Once every few weeks. 32

Frequency of individual's internet use for online banking or paying bills

	Almost constantly when I'm home	Several times a day	A few times a day	About once a day	4 or 5 times a week	2 or 3 times a week	Once a week	Once every few weeks	About once a month	A few times a year	Almost never	Never	Not sure
Total	8%	2%	3%	6%	2%	13%	10%	6%	12%	2%	4%	32%	0%
SW Florida	6%	2%	3%	7%	2%	12%	12%	8%	14%	1%	2%	31%	0%
Polk County	11%	2%	4%	4%	3%	9%	11%	5%	12%	6%	1%	31%	1%
RACEC	8%	3%	1%	6%	2%	18%	7%	5%	9%	1%	8%	33%	1%

Frequency of all household members' internet use for online banking or paying bills

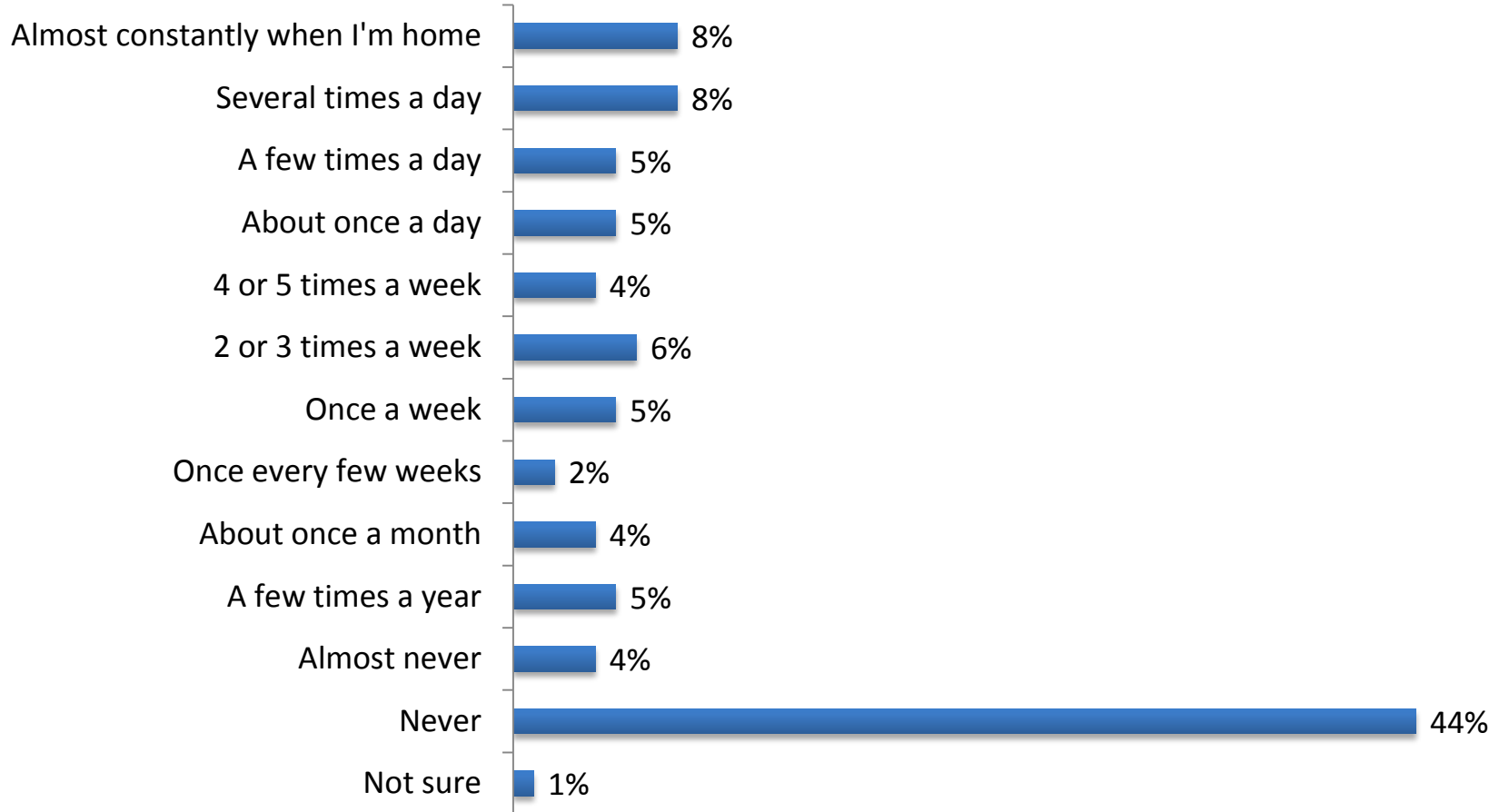


Median: About once a month.

Frequency of all household members' internet use for online banking or paying bills

	Almost constantly when I'm home	Several times a day	A few times a day	About once a day	4 or 5 times a week	2 or 3 times a week	Once a week	Once every few weeks	About once a month	A few times a year	Almost never	Never	Not sure
Total	7%	2%	5%	3%	2%	11%	8%	6%	9%	2%	3%	40%	2%
SW Florida	6%	3%	5%	5%	1%	7%	9%	9%	12%	0%	3%	36%	2%
Polk County	9%	1%	6%	2%	3%	7%	11%	4%	8%	6%	2%	40%	1%
RACEC	6%	1%	2%	3%	1%	20%	5%	5%	6%	1%	2%	44%	4%

Frequency of individual's internet use for educational purposes

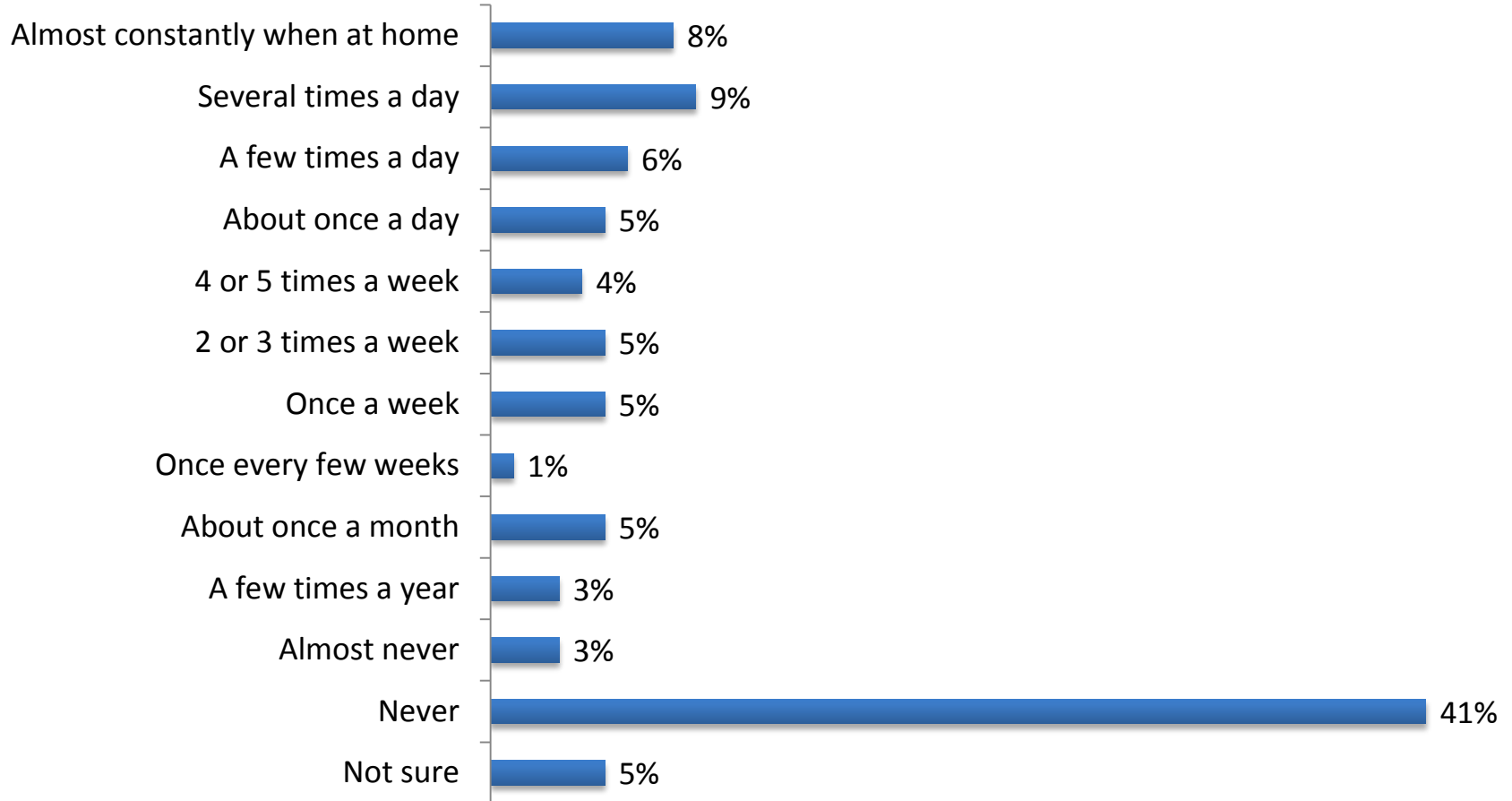


Median: A few times a year.

Frequency of individual's internet use for educational purposes

	Almost constantly when I'm home	Several times a day	A few times a day	About once a day	4 or 5 times a week	2 or 3 times a week	Once a week	Once every few weeks	About once a month	A few times a year	Almost never	Never	Not sure
Total	8%	8%	5%	5%	4%	6%	5%	2%	4%	5%	4%	44%	1%
SW Florida	9%	5%	8%	6%	6%	3%	3%	2%	4%	6%	2%	46%	0%
Polk County	9%	9%	5%	5%	1%	6%	7%	1%	4%	4%	5%	42%	1%
RACEC	6%	12%	0%	4%	5%	8%	4%	3%	4%	3%	6%	43%	1%

Frequency of all household members' internet use for educational purposes

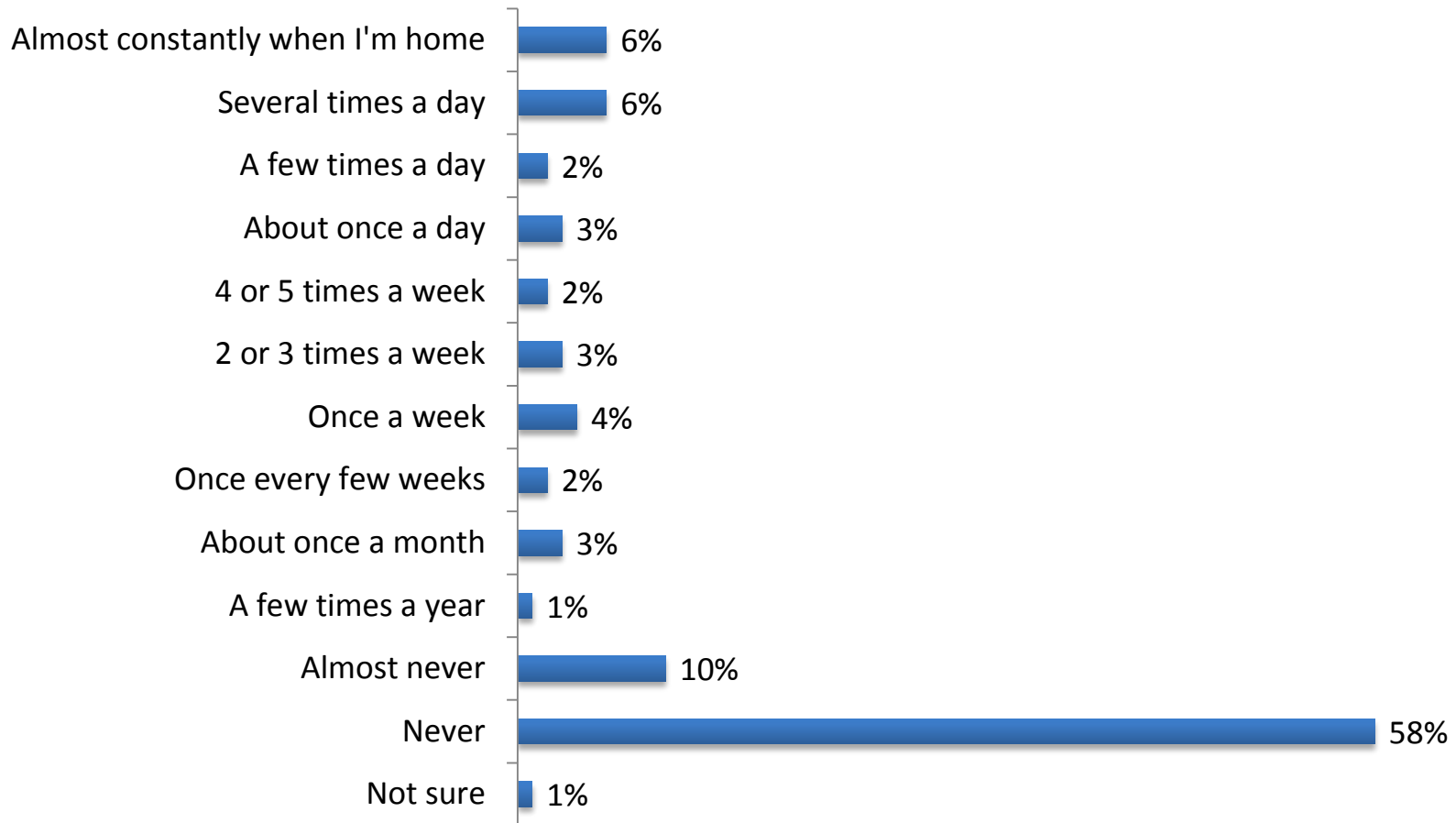


Median: A few times a year.

Frequency of all household members' internet use for educational purposes

	Almost constantly when I'm home	Several times a day	A few times a day	About once a day	4 or 5 times a week	2 or 3 times a week	Once a week	Once every few weeks	About once a month	A few times a year	Almost never	Never	Not sure
Total	8%	9%	6%	5%	4%	5%	5%	1%	5%	3%	3%	41%	5%
SW Florida	9%	8%	7%	6%	5%	2%	5%	1%	5%	3%	2%	44%	3%
Polk County	11%	7%	7%	5%	3%	5%	6%	1%	5%	5%	4%	35%	7%
RACEC	4%	14%	3%	3%	5%	9%	6%	2%	4%	1%	2%	44%	3%

Frequency of individual's internet use for business-related tasks

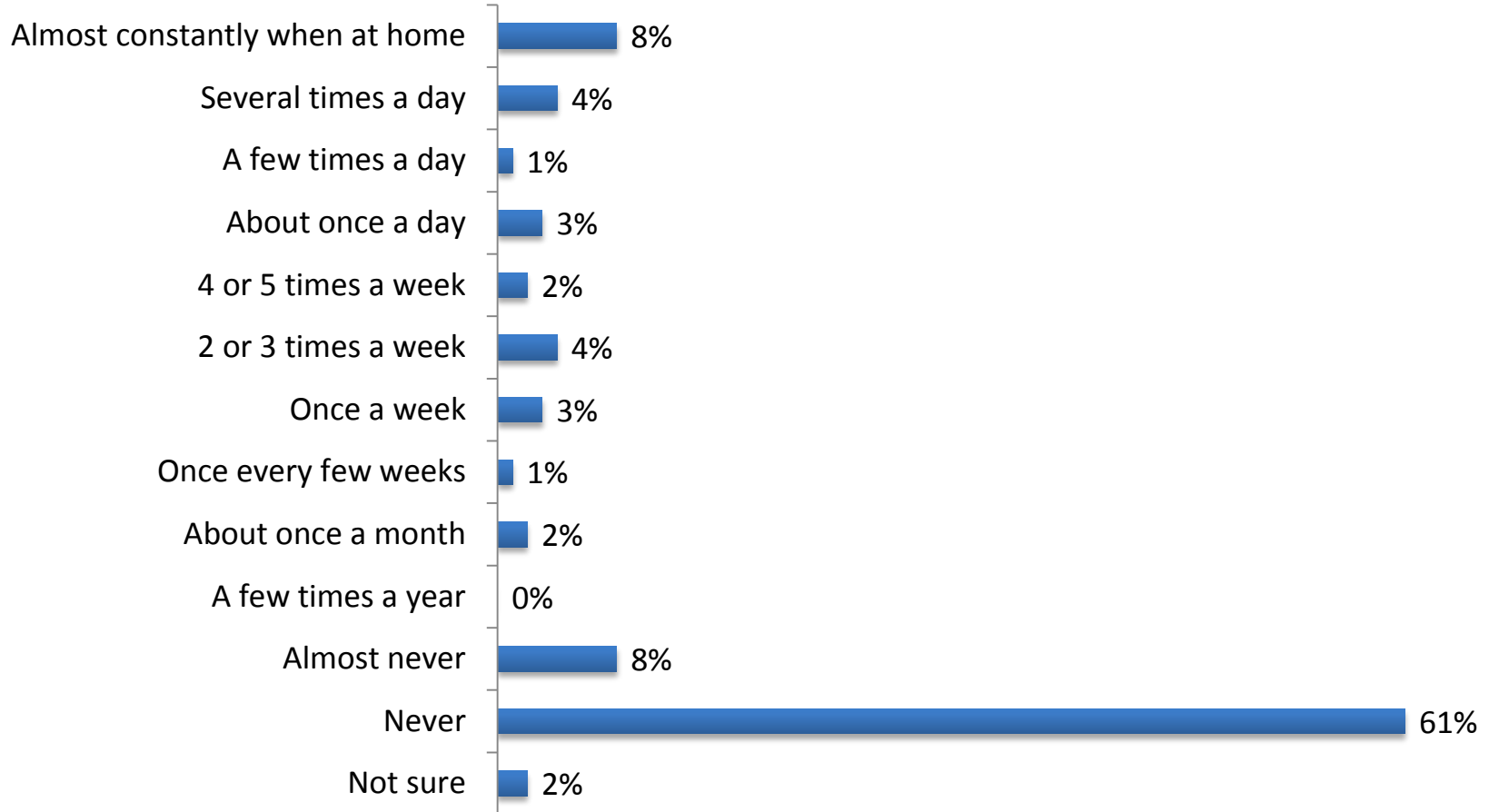


Median: Never.

Frequency of individual's internet use for business-related tasks

	Almost constantly when I'm home	Several times a day	A few times a day	About once a day	4 or 5 times a week	2 or 3 times a week	Once a week	Once every few weeks	About once a month	A few times a year	Almost never	Never	Not sure
Total	6%	6%	2%	3%	2%	3%	4%	2%	3%	1%	10%	58%	1%
SW Florida	7%	4%	2%	4%	1%	4%	4%	4%	5%	1%	8%	55%	1%
Polk County	6%	9%	2%	4%	1%	2%	5%	1%	2%	1%	12%	54%	2%
RACEC	4%	4%	1%	2%	3%	3%	1%	0%	1%	1%	10%	67%	1%

Frequency of all household members' internet use for business-related tasks

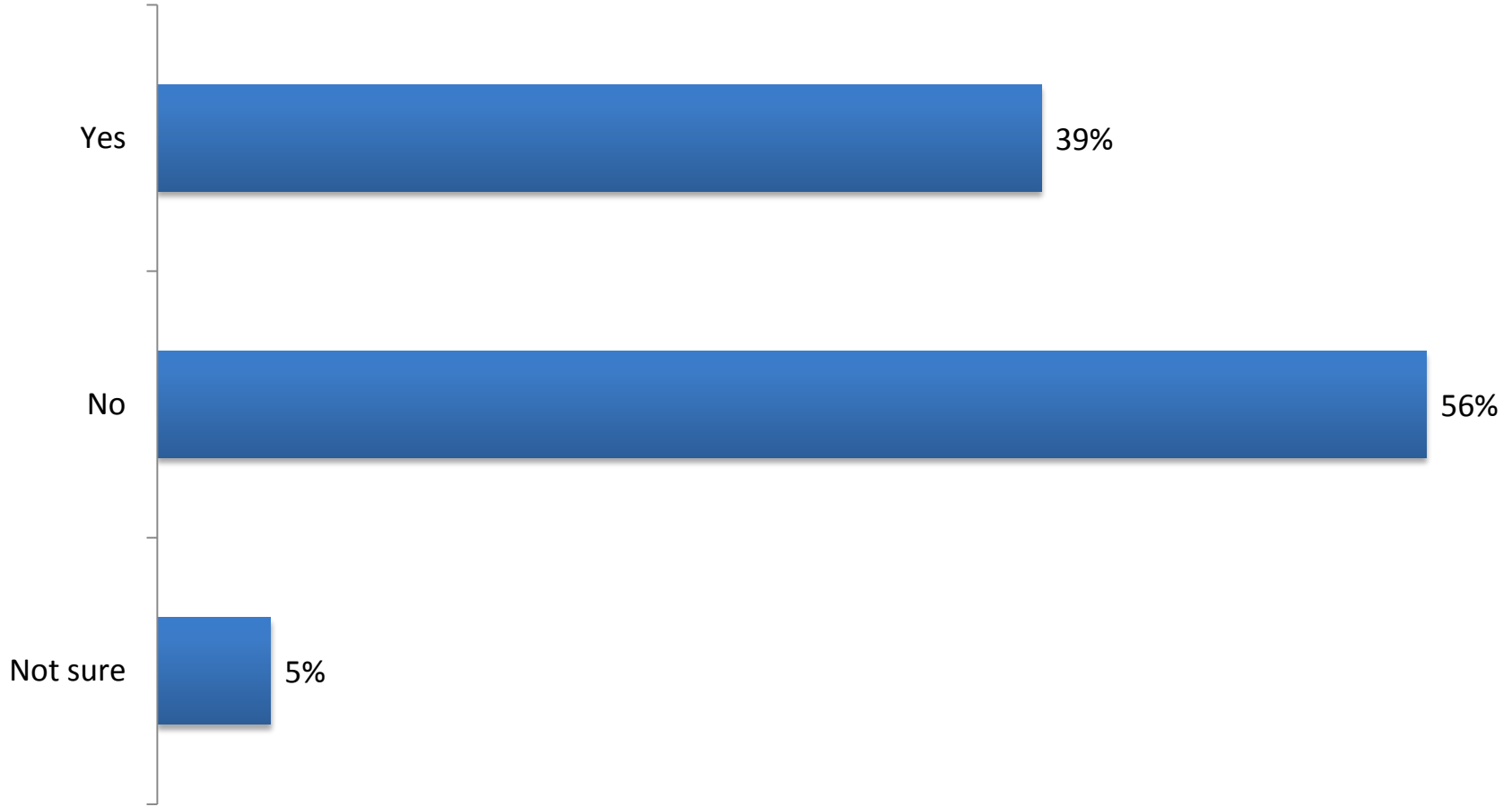


Median: Never.

Frequency of all household members' internet use for business-related tasks

	Almost constantly when I'm home	Several times a day	A few times a day	About once a day	4 or 5 times a week	2 or 3 times a week	Once a week	Once every few weeks	About once a month	A few times a year	Almost never	Never	Not sure
Total	8%	4%	1%	3%	2%	4%	3%	1%	2%	0%	8%	61%	2%
SW Florida	8%	3%	2%	3%	1%	6%	1%	2%	1%	0%	6%	63%	3%
Polk County	11%	7%	2%	3%	2%	3%	6%	0%	2%	1%	8%	54%	1%
RACEC	6%	3%	1%	1%	3%	3%	2%	0%	2%	0%	9%	68%	2%

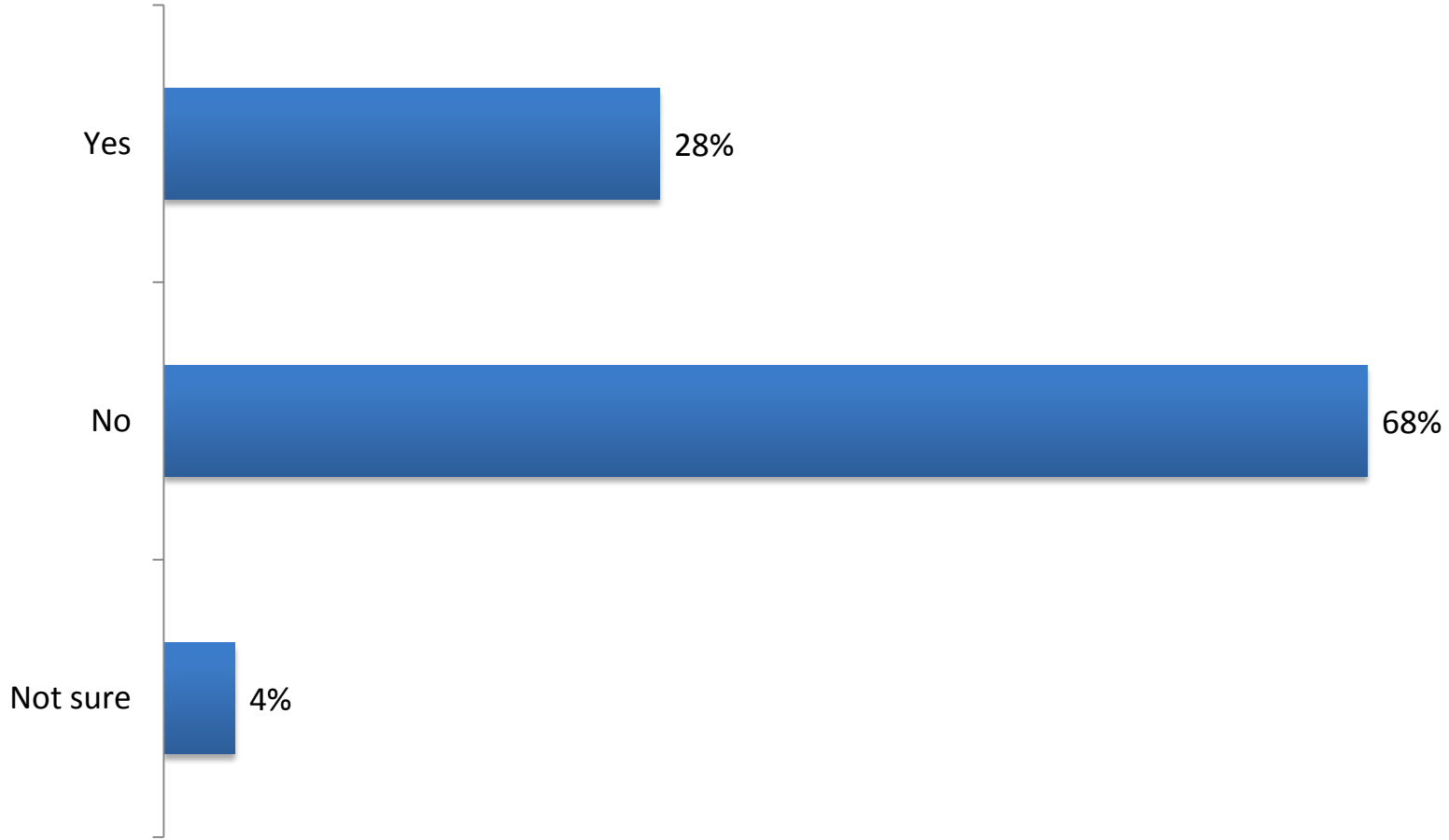
Would you increase your internet use if you had a faster connection: Entertainment



Would you increase your internet use if you had a faster connection: Entertainment

	Yes	No	Not sure
Total	39%	56%	5%
SW Florida	43%	52%	5%
Polk County	38%	57%	5%
RACEC	36%	60%	4%

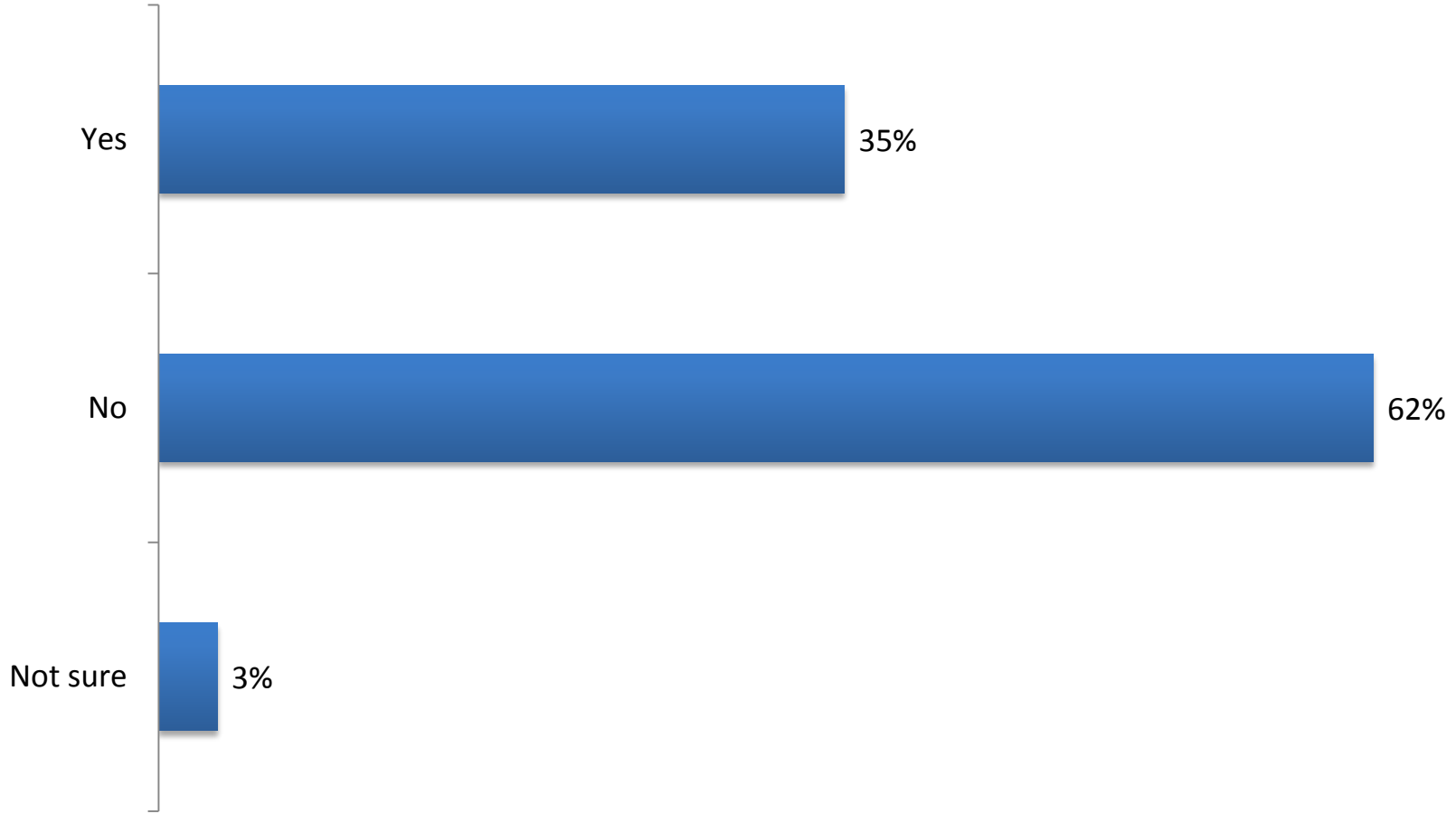
Would you increase your internet use if you had a faster connection: Online shopping



Would you increase your internet use if you had a faster connection: Online shopping

	Yes	No	Not sure
Total	28%	68%	4%
SW Florida	27%	71%	2%
Polk County	29%	67%	4%
RACEC	28%	66%	6%

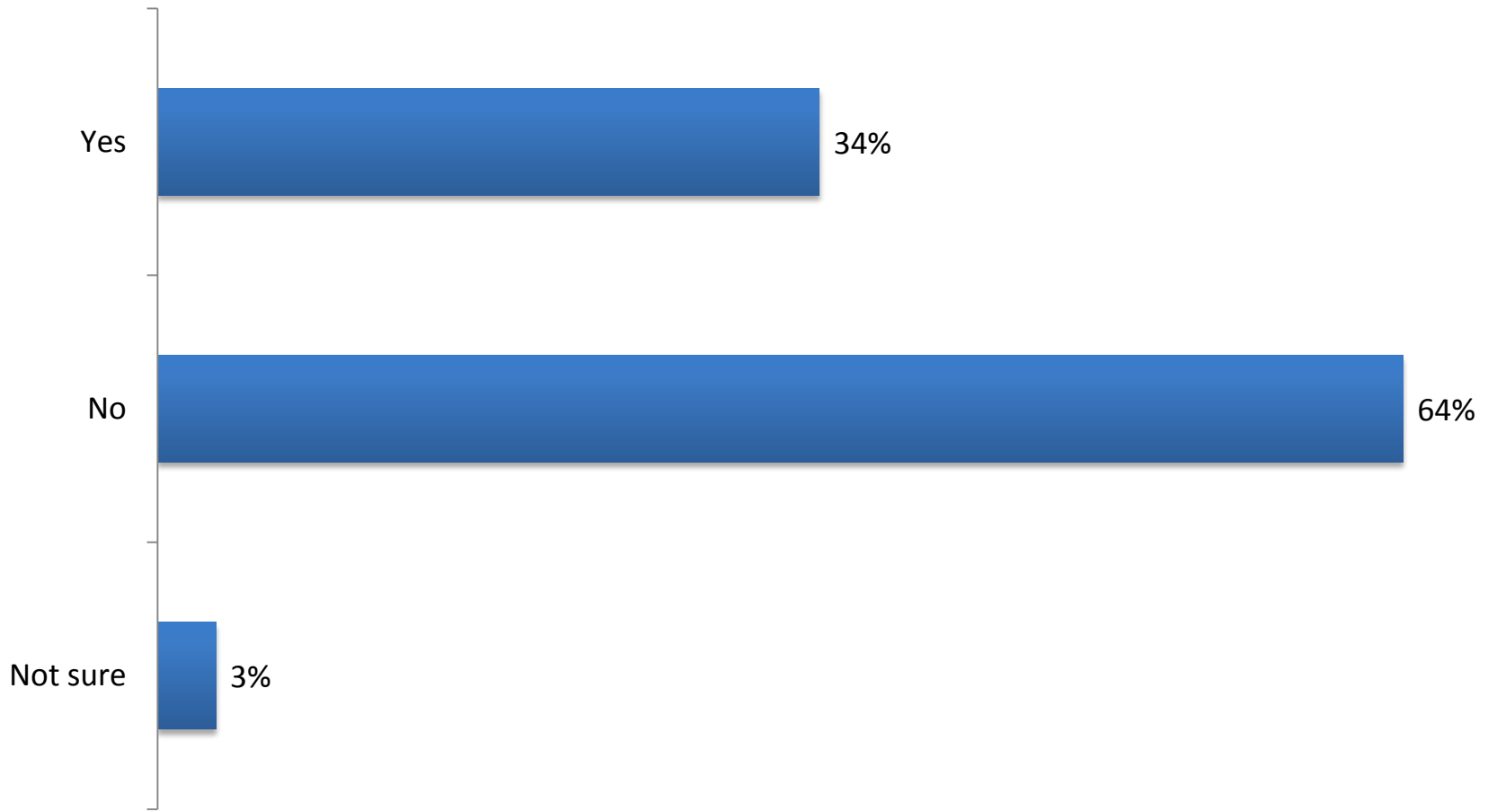
Would you increase your internet use if you had a faster connection: Online banking/paying bills



Would you increase your internet use if you had a faster connection: Online banking/paying bills

	Yes	No	Not sure
Total	35%	62%	3%
SW Florida	39%	57%	4%
Polk County	33%	64%	2%
RACEC	34%	64%	2%

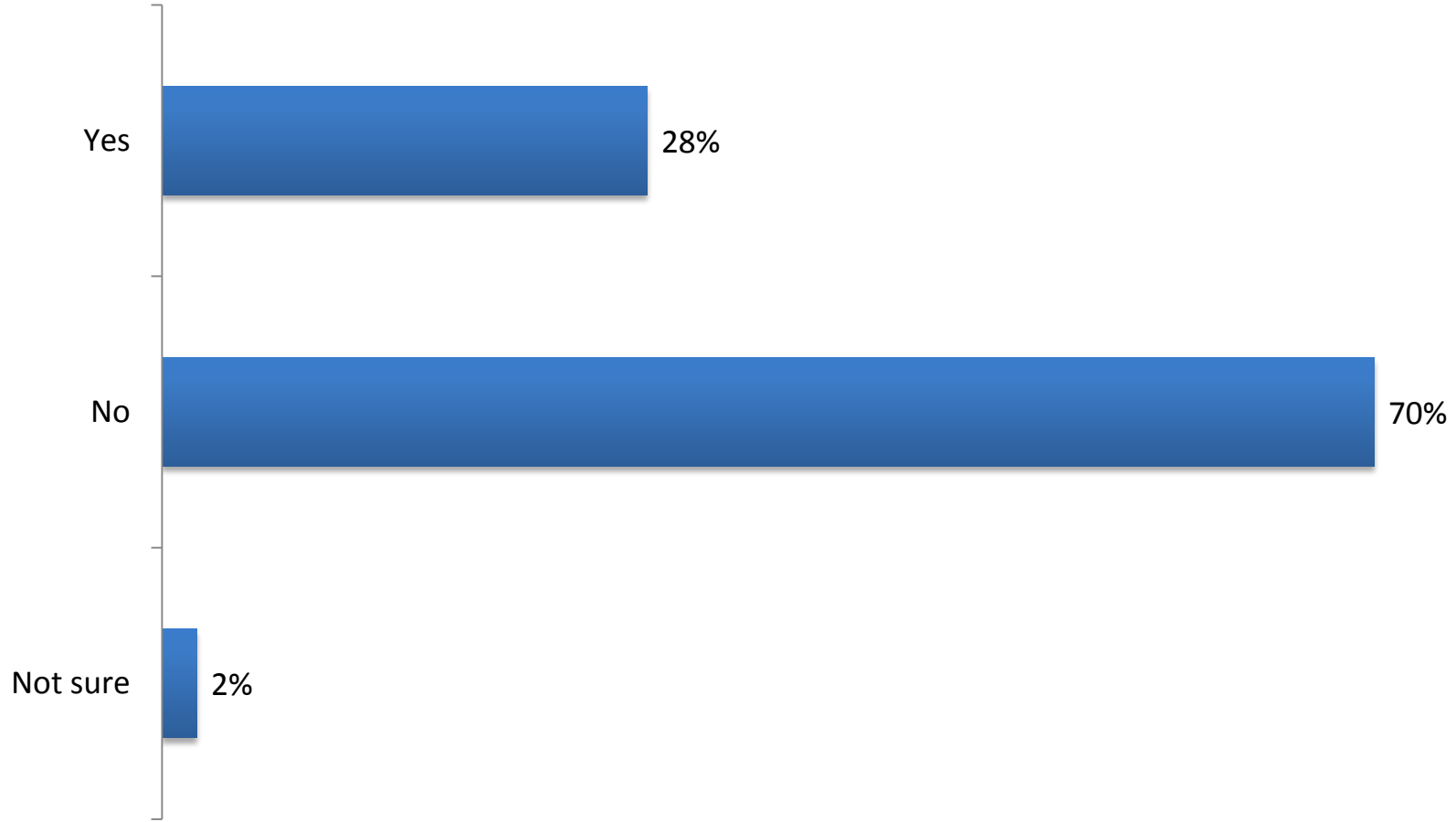
Would you increase your internet use if you had a faster connection: Education



Would you increase your internet use if you had a faster connection: Education

	Yes	No	Not sure
Total	34%	64%	3%
SW Florida	36%	63%	1%
Polk County	34%	61%	4%
RACEC	30%	67%	4%

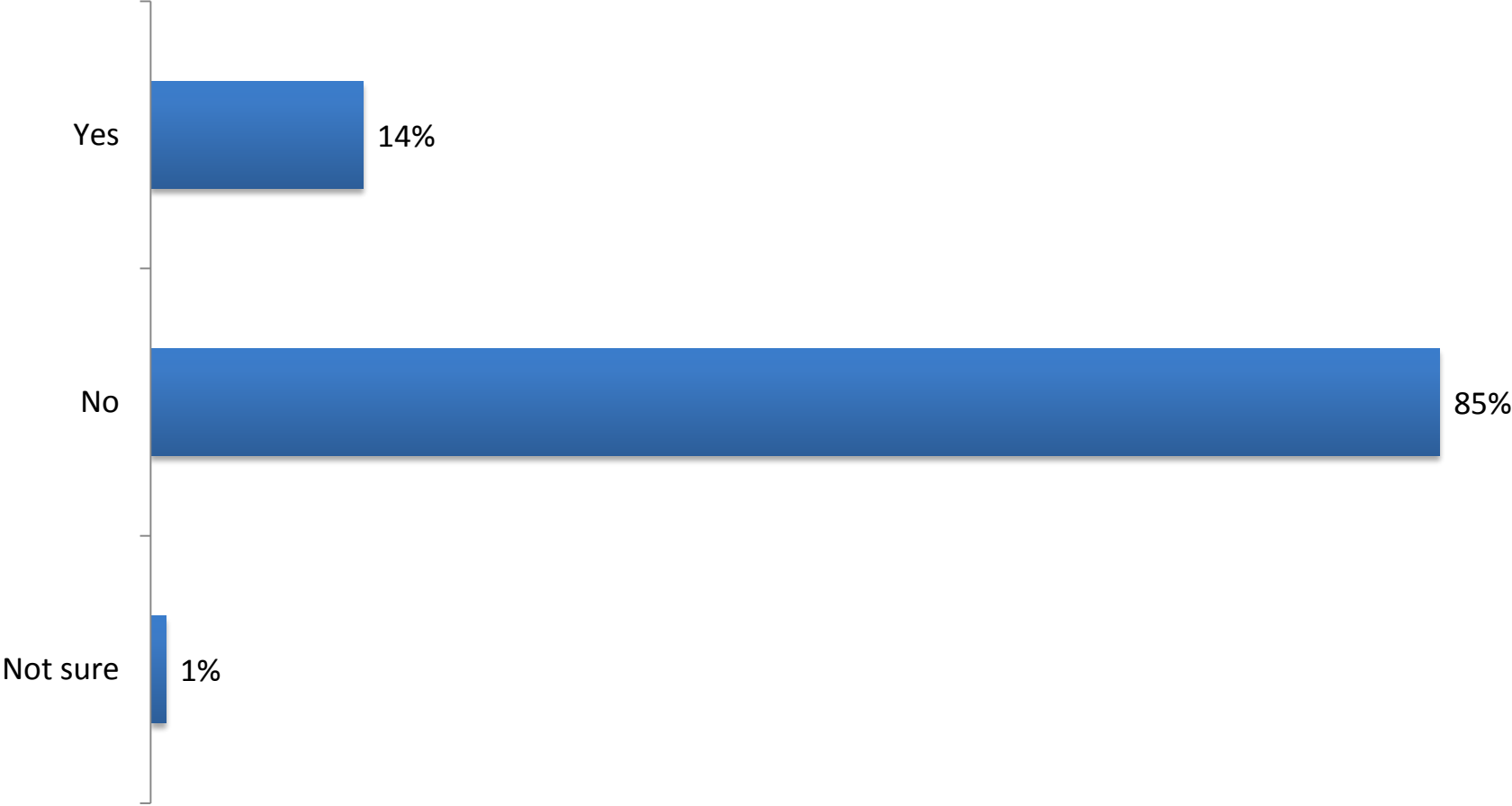
Would you increase your internet use if you had a faster connection: Business



Would you increase your internet use if you had a faster connection: Business

	Yes	No	Not sure
Total	28%	70%	2%
SW Florida	32%	67%	1%
Polk County	30%	68%	2%
RACEC	22%	76%	2%

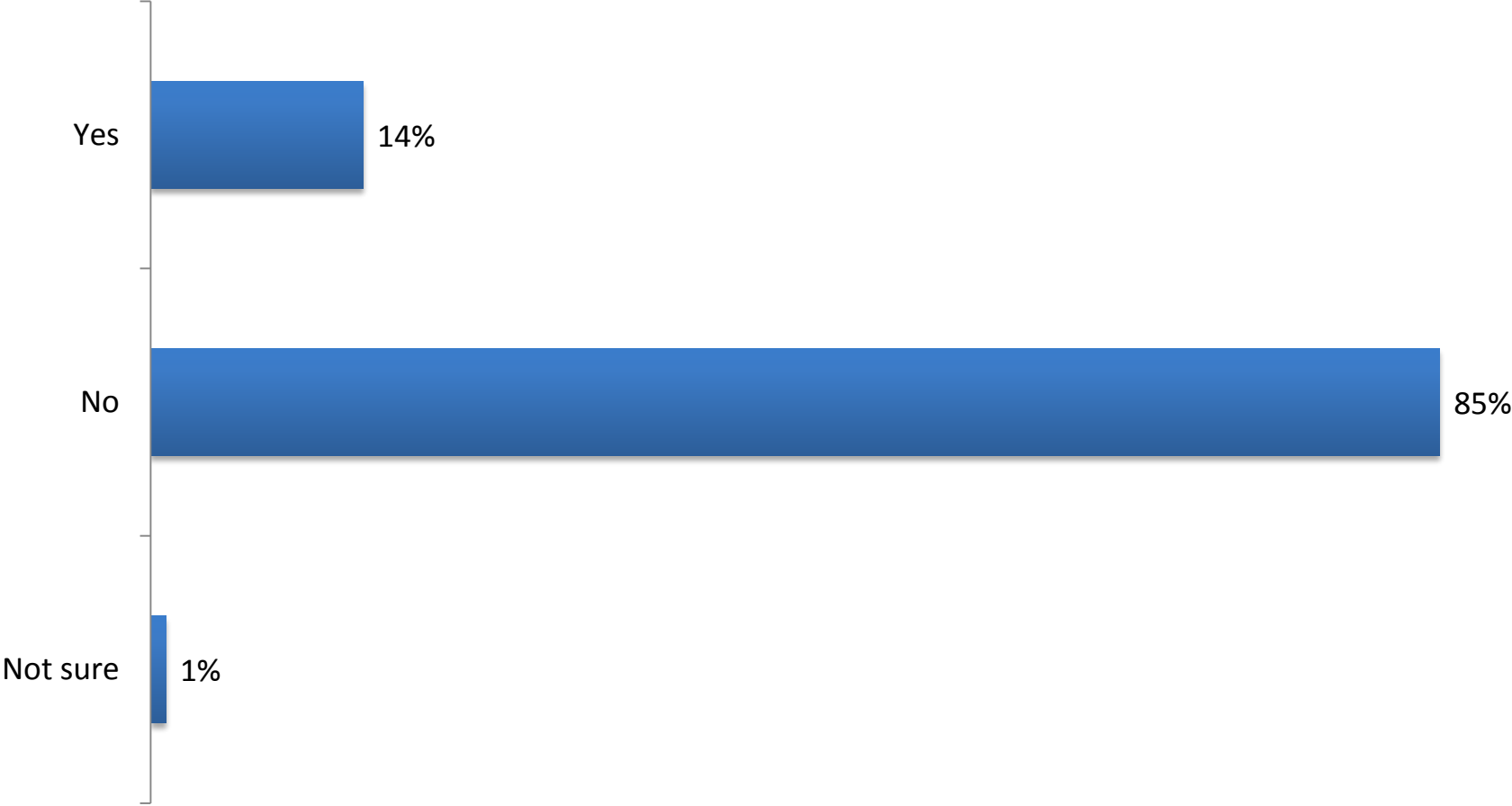
Do you or any members of your household: Have a home business



Do you or any members of your household: Have a home business

	Yes	No	Not sure
Total	14%	85%	1%
SW Florida	12%	88%	0%
Polk County	15%	83%	1%
RACEC	15%	84%	1%

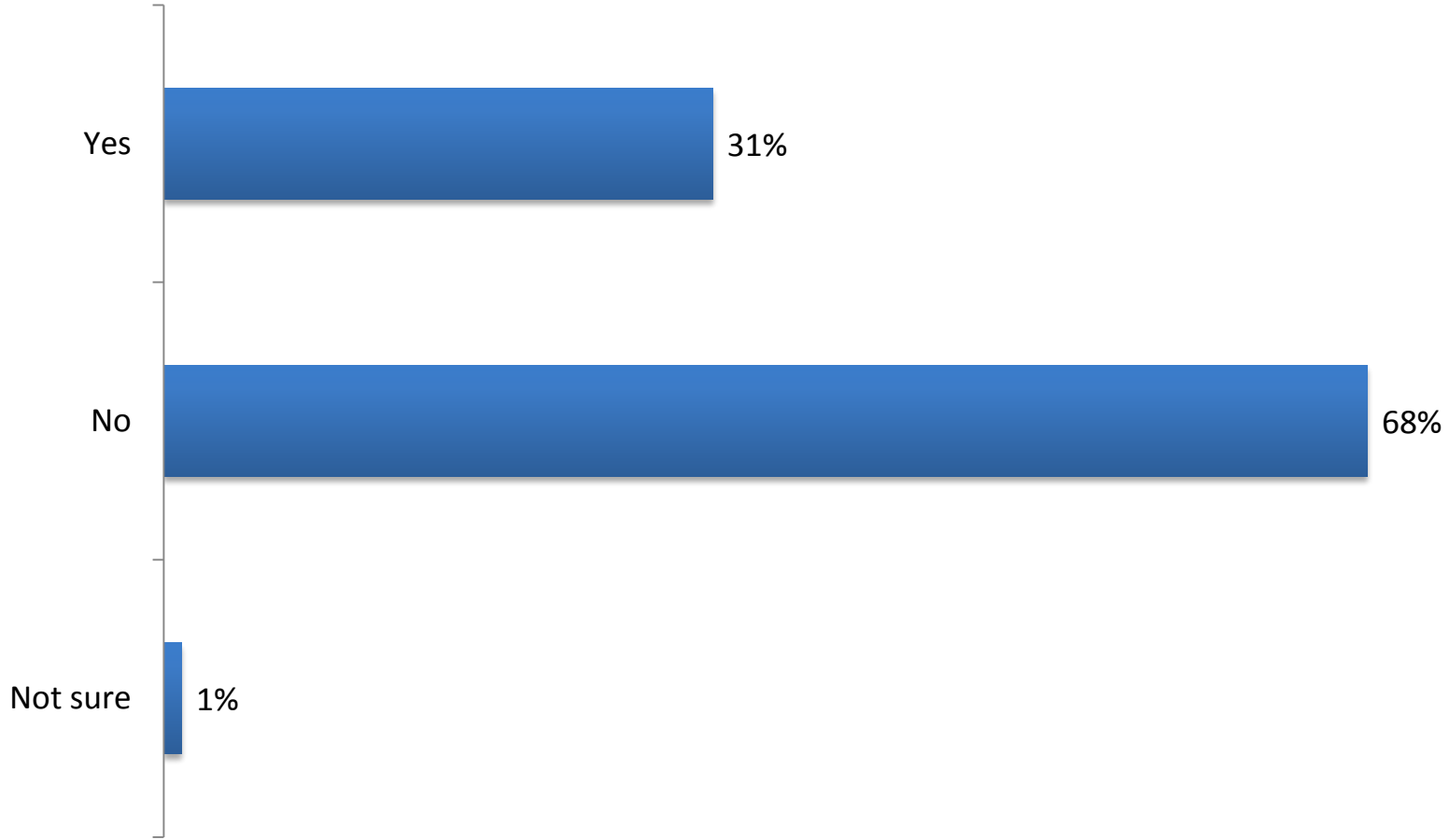
Do you or any members of your household: Telecommute



Do you or any members of your household: Telecommute

	Yes	No	Not sure
Total	14%	85%	1%
SW Florida	11%	88%	0%
Polk County	17%	81%	2%
RACEC	14%	86%	0%

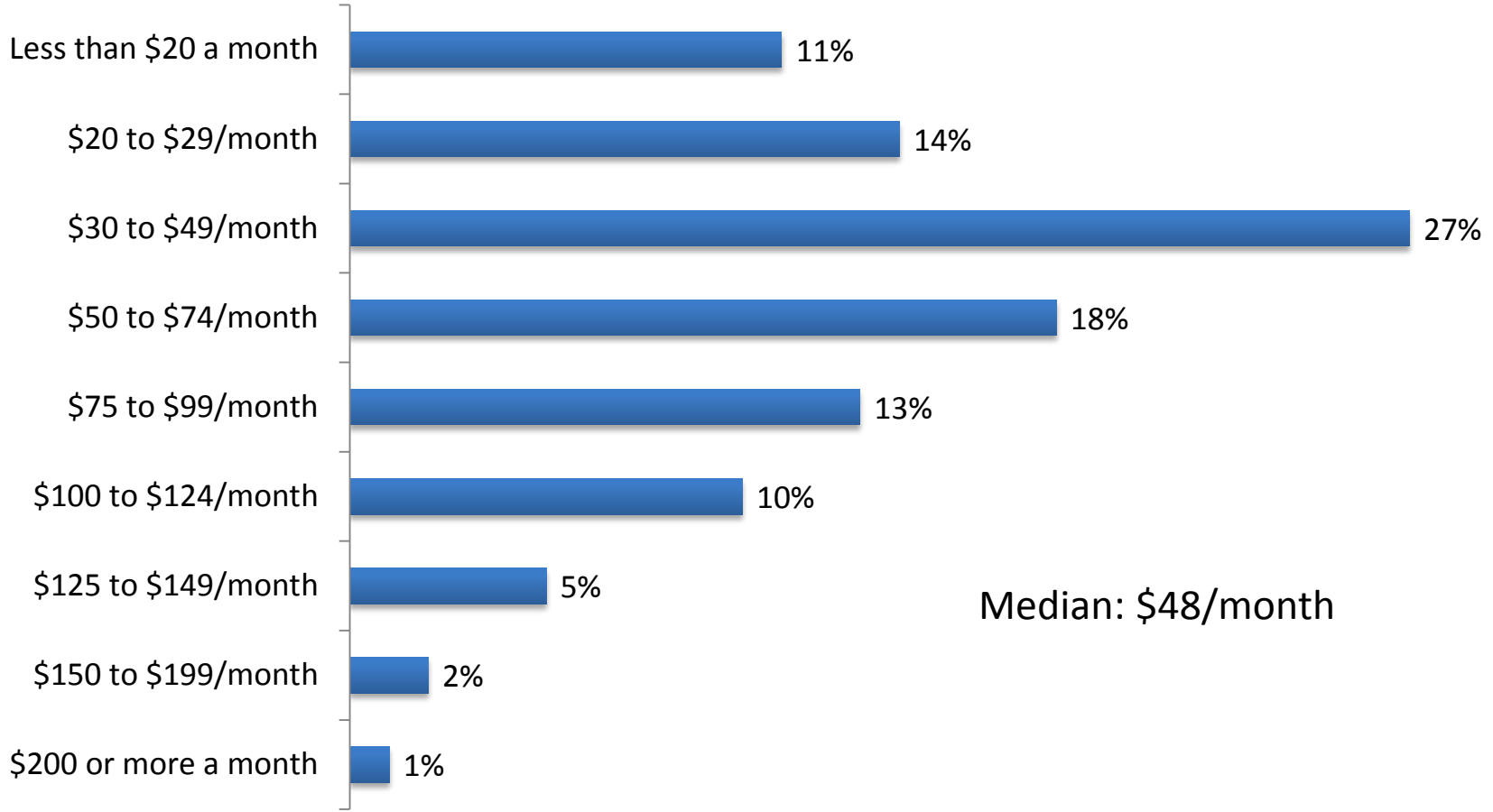
Do you or any members of your household: Do business-related work on a computer at home



Do you or any members of your household: Do business-related work on a computer at home

	Yes	No	Not sure
Total	31%	68%	1%
SW Florida	32%	68%	0%
Polk County	34%	64%	2%
RACEC	28%	72%	0%

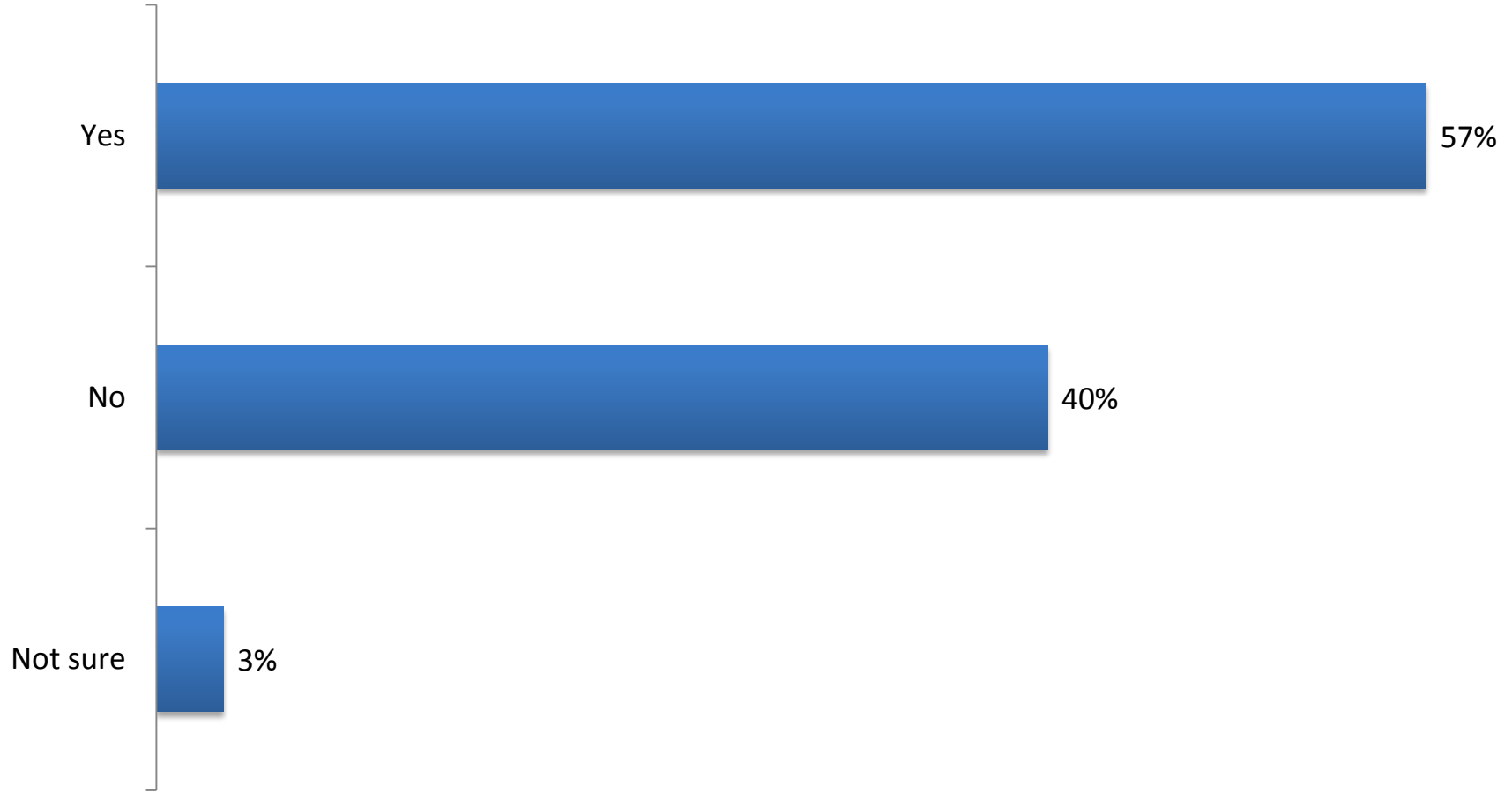
Best estimate for cost of internet connection



Best estimate for cost of internet connection

	Less than \$20 a month	\$20 to \$29 /month	\$30 to \$49 /month	\$50 to \$74 /month	\$75 to \$99 /month	\$100 to \$124 /month	\$125 to \$149 /month	\$150 to \$199 /month	\$200 or more a month
Total	11%	14%	27%	18%	13%	10%	5%	2%	1%
SW Florida	9%	13%	28%	17%	16%	6%	7%	2%	1%
Polk County	7%	10%	25%	21%	11%	16%	6%	3%	1%
RACEC	16%	19%	27%	17%	11%	7%	2%	2%	0%

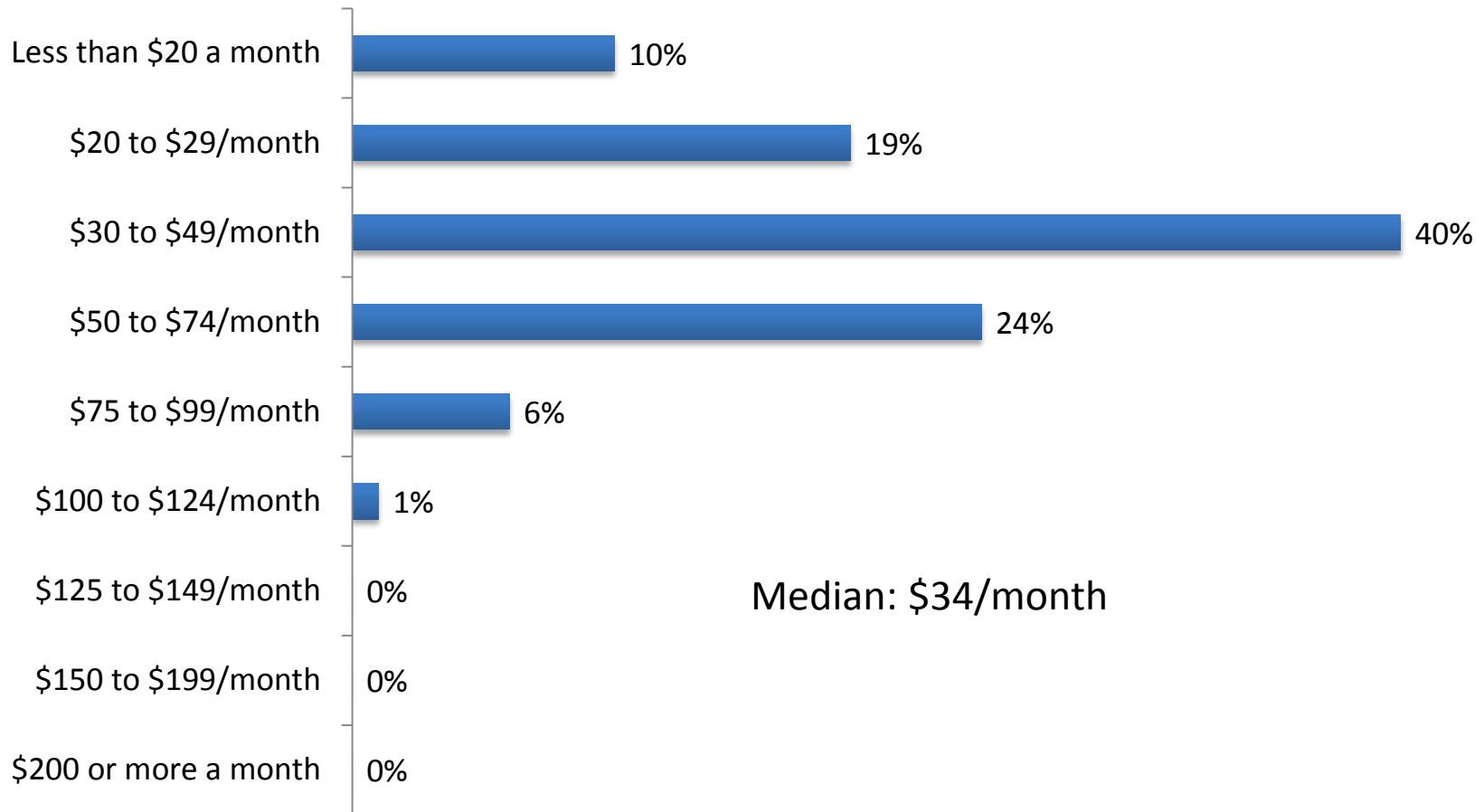
Does that cost include something else, such as cable TV, mobile phone, etc.?



Does that cost include something else, such as cable TV, mobile phone, etc.?

	Yes	No	Not sure
Total	57%	40%	3%
SW Florida	55%	42%	4%
Polk County	66%	31%	3%
RACEC	51%	48%	1%

Best estimate for cost for internet connection only

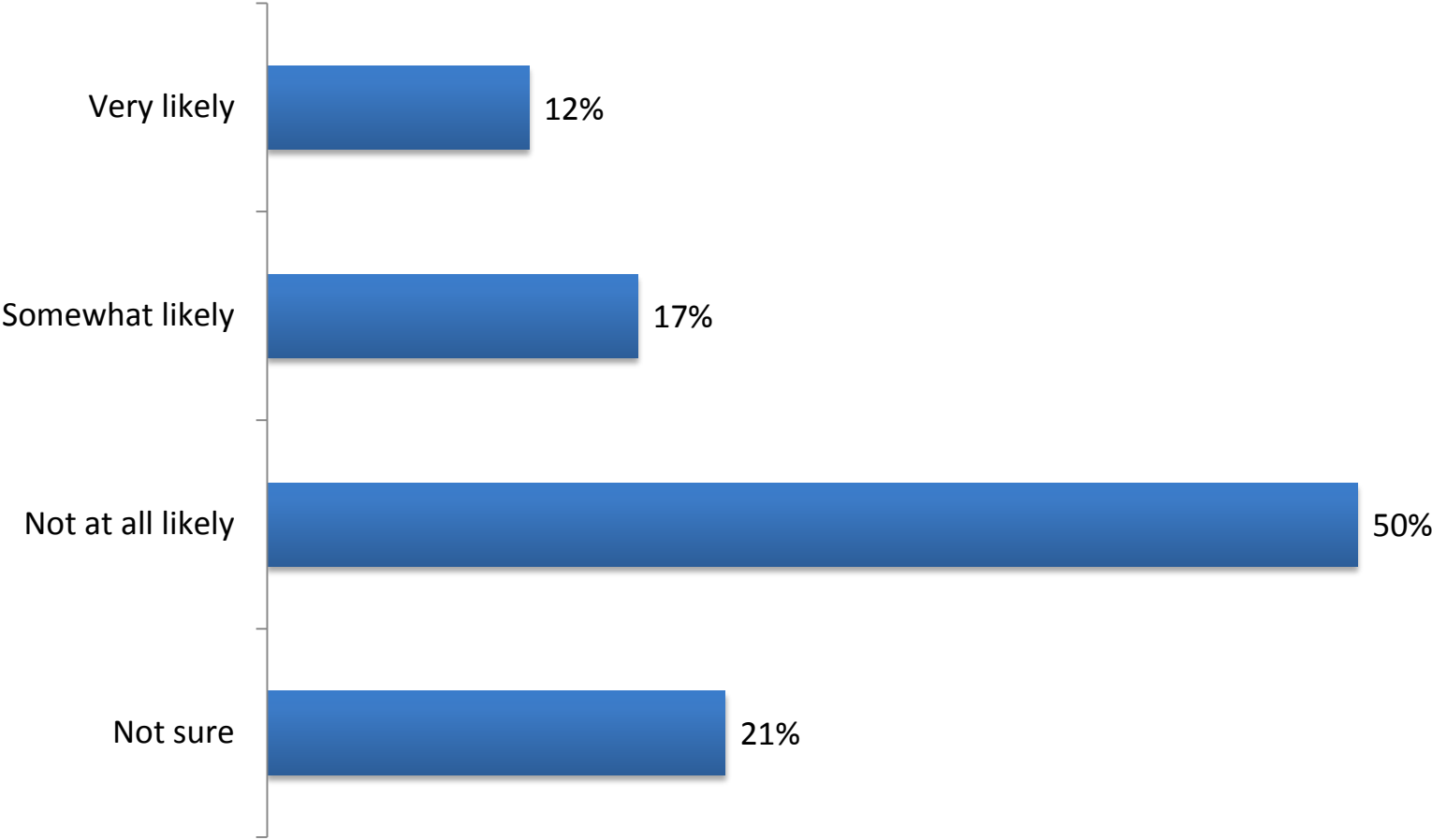


Best estimate for cost of internet connection only

	Less than \$20 a month	\$20 to \$29 /month	\$30 to \$49 /month	\$50 to \$74 /month	\$75 to \$99 /month	\$100 to \$124 /month	\$125 to \$149 /month	\$150 to \$199 /month	\$200 or more a month
Total	10%	19%	40%	24%	6%	1%	0%	0%	0%
SW Florida	11%	21%	39%	19%	9%	2%	1%	0%	0%
Polk County	6%	14%	45%	31%	3%	0%	0%	0%	0%
RACEC	11%	22%	37%	24%	5%	1%	0%	0%	0%

People who do not have home internet service

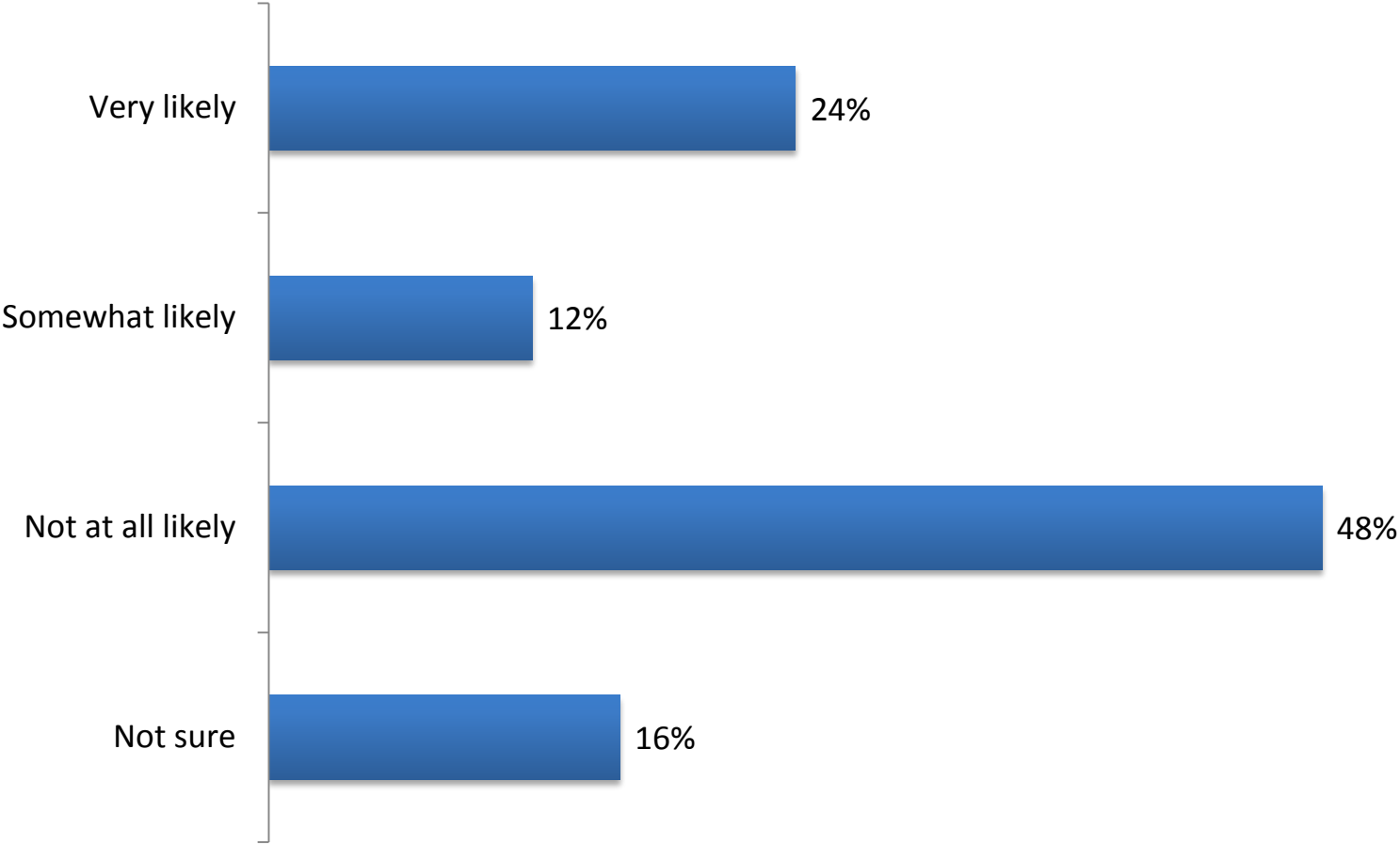
If you had an internet connection, how likely would your household members be to use the internet for: online shopping



If you had an internet connection, how likely would your household members be to use the internet for: online shopping

	Very likely	Somewhat likely	Not at all likely	Not sure
Total	12%	17%	50%	21%
SW Florida	14%	33%	43%	10%
Polk County	6%	12%	44%	38%
RACEC	19%	10%	62%	9%

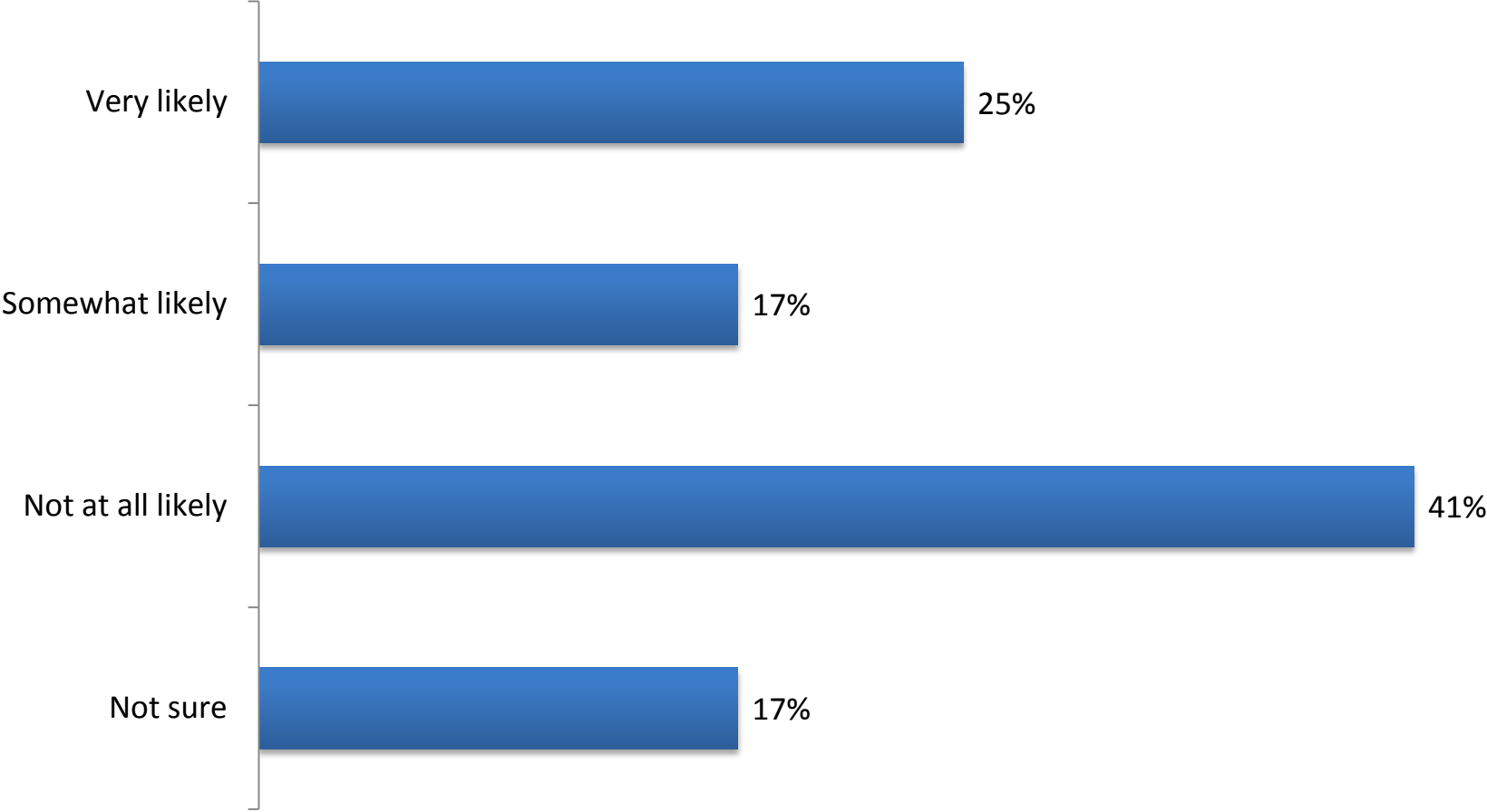
If you had an internet connection, how likely would your household members be to use the internet for: education



If you had an internet connection, how likely would your household members be to use the internet for: education

	Very likely	Somewhat likely	Not at all likely	Not sure
Total	24%	12%	48%	16%
SW Florida	50%	5%	38%	6%
Polk County	11%	11%	44%	33%
RACEC	19%	18%	61%	3%

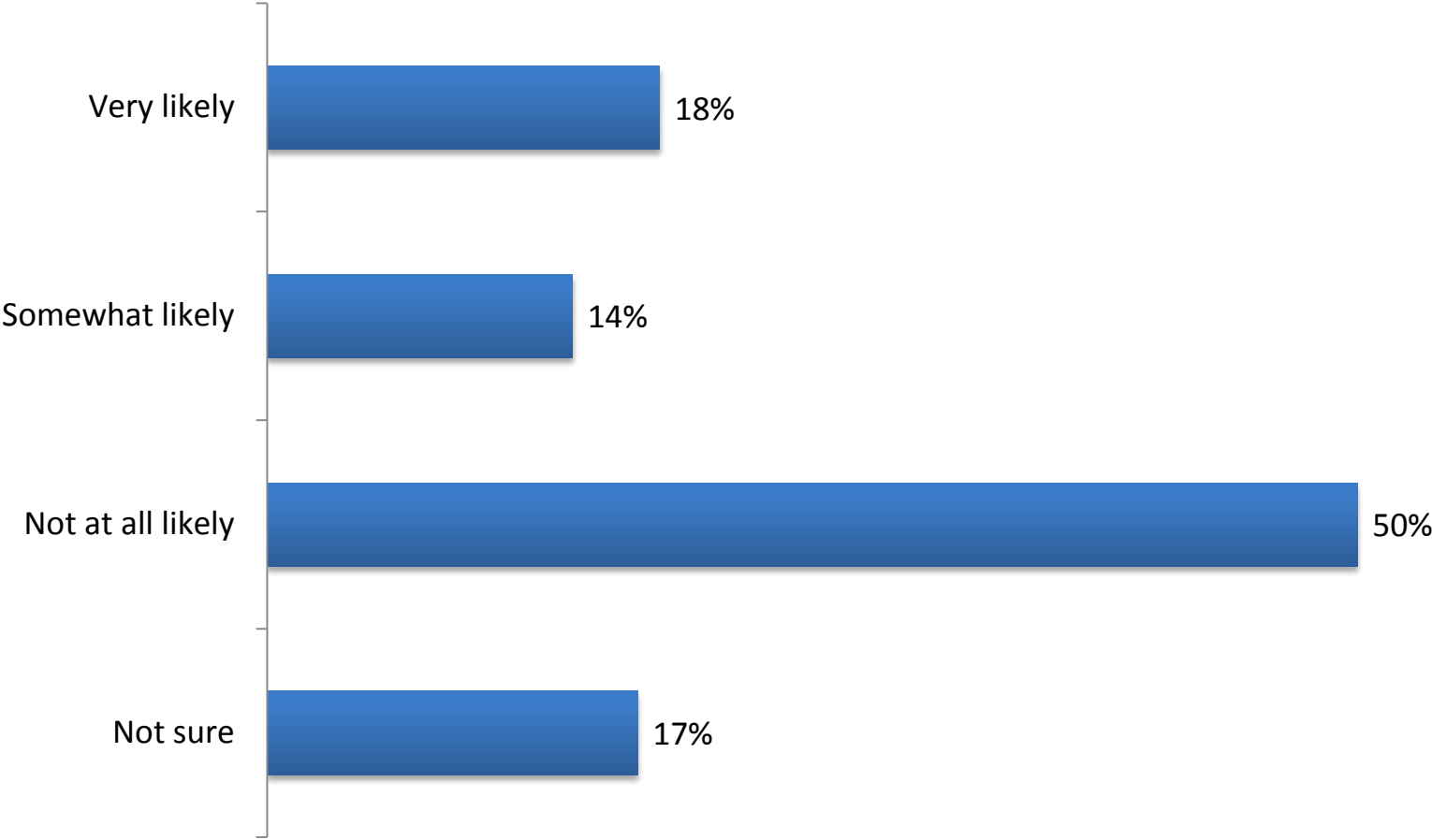
If you had an internet connection, how likely would your household members be to use the internet for: entertainment



If you had an internet connection, how likely would your household members be to use the internet for: entertainment

	Very likely	Somewhat likely	Not at all likely	Not sure
Total	25%	17%	41%	17%
SW Florida	42%	17%	31%	10%
Polk County	19%	10%	38%	33%
RACEC	21%	24%	53%	3%

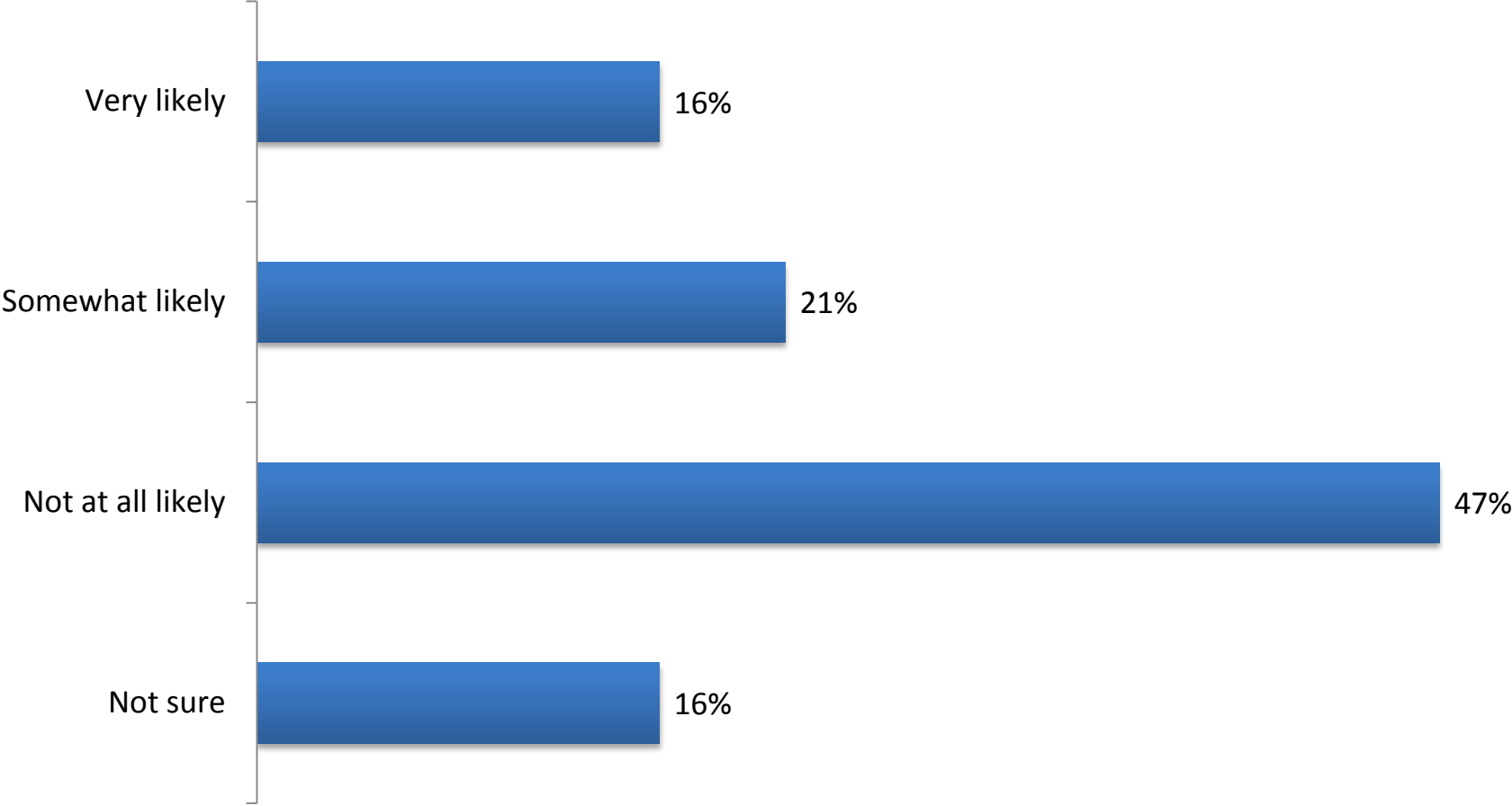
If you had an internet connection, how likely would your household members be to use the internet for: business-related tasks



If you had an internet connection, how likely would your household members be to use the internet for: business-related tasks

	Very likely	Somewhat likely	Not at all likely	Not sure
Total	18%	14%	50%	17%
SW Florida	31%	15%	43%	11%
Polk County	13%	10%	44%	33%
RACEC	15%	19%	64%	3%

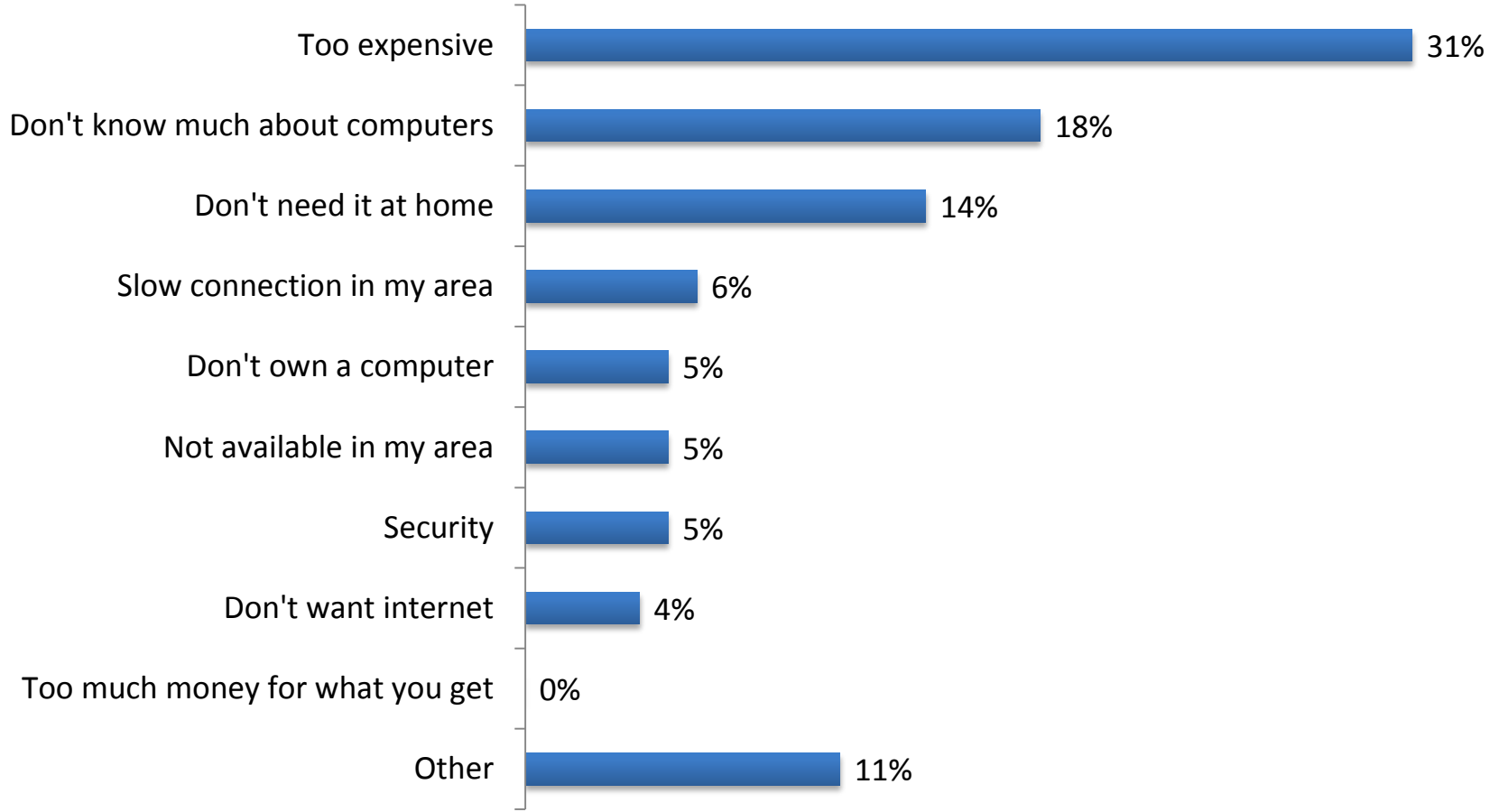
If you had an internet connection, how likely would your household members be to use the internet for: online banking or paying bills



If you had an internet connection, how likely would your household members be to use the internet for: online banking or paying bills

	Very likely	Somewhat likely	Not at all likely	Not sure
Total	16%	21%	47%	16%
SW Florida	12%	44%	40%	4%
Polk County	20%	6%	40%	34%
RACEC	13%	22%	62%	4%

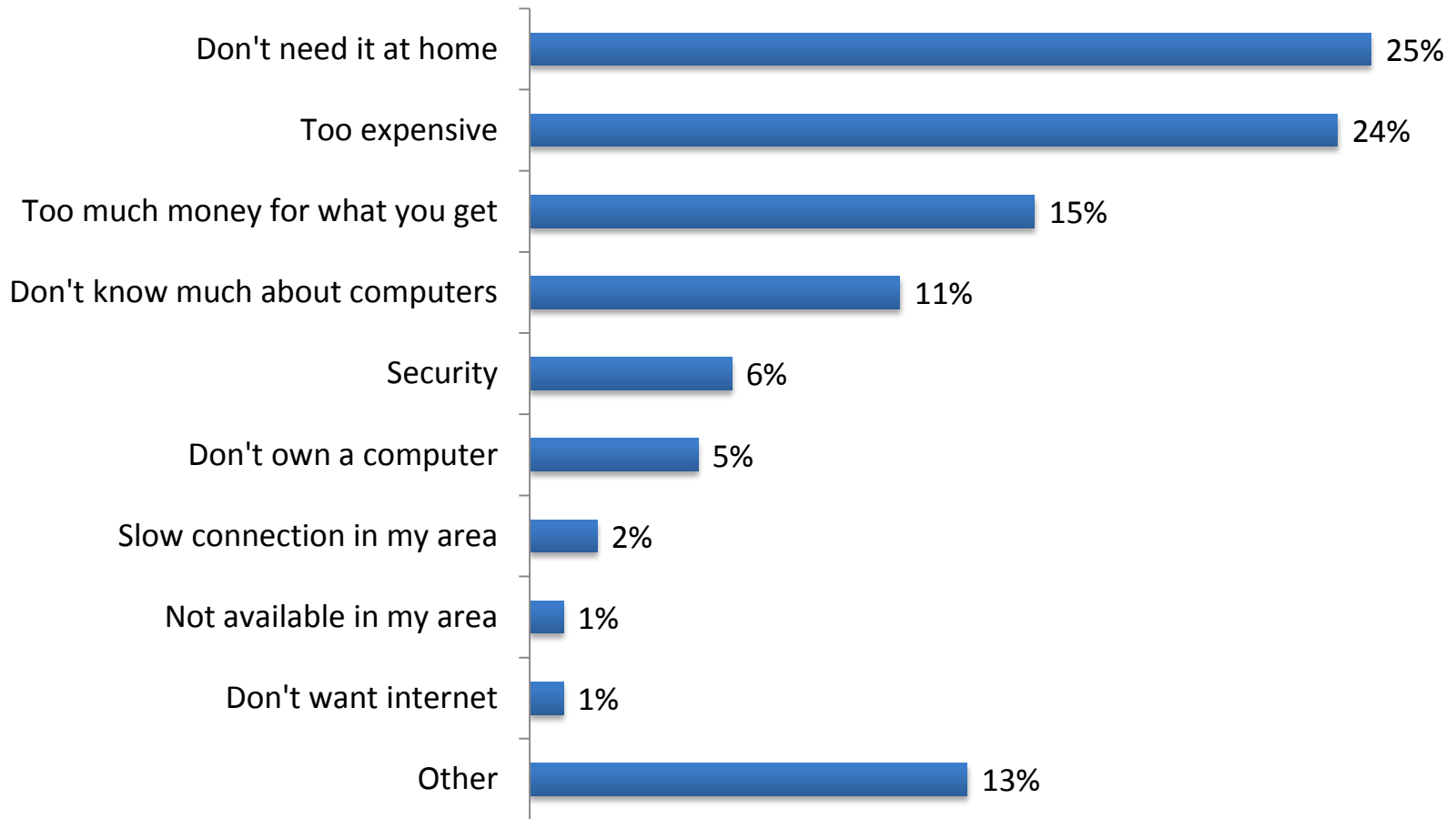
Number one reason for lack of internet service



Number one reason for lack of internet service

	Total	SW Florida	Polk County	RACEC
Too expensive	31%	15%	41%	33%
Don't know much about computers	18%	26%	10%	22%
Don't need it at home	14%	15%	11%	18%
Slow connection in my area	6%	18%	0%	3%
Don't own a computer	5%	4%	9%	2%
Security	5%	0%	10%	3%
Not available in my area	4%	5%	5%	3%
Don't want internet	4%	3%	6%	4%
Other	11%	14%	8%	13%

Other reasons for lack of internet service

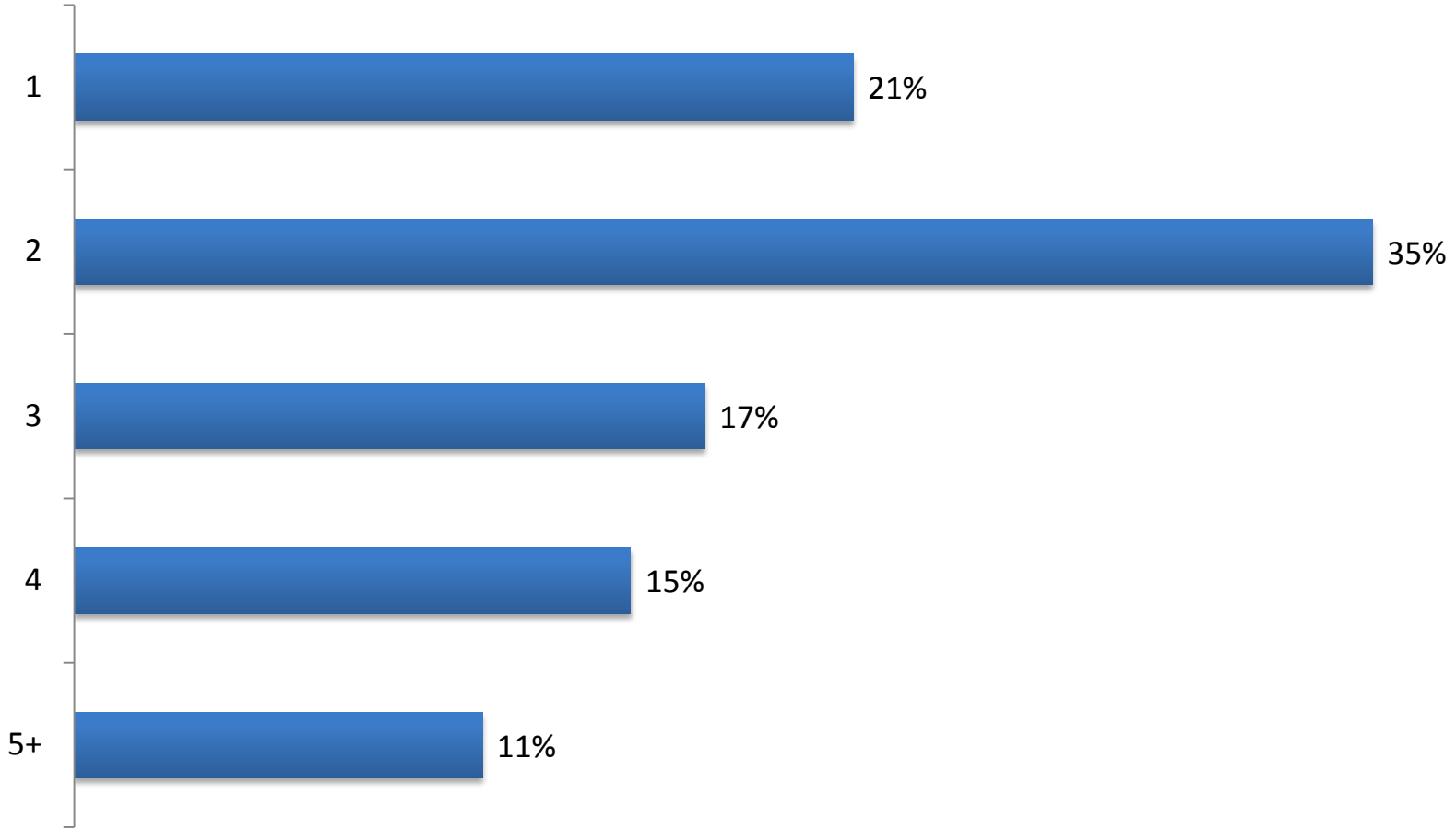


Other reasons for lack of internet service

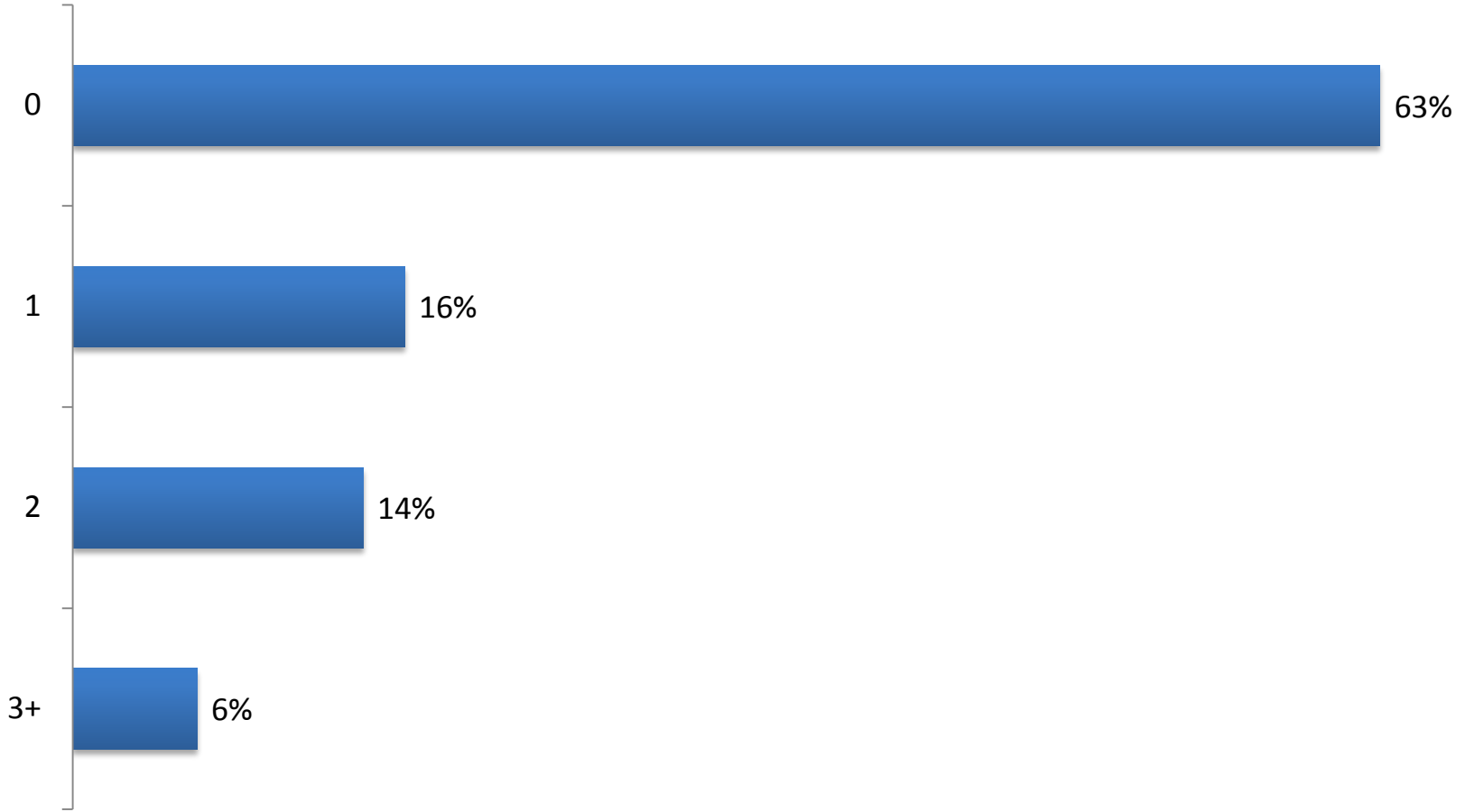
	Total	SW Florida	Polk County	RACEC
Don't need it at home	25%	22%	24%	29%
Too expensive	24%	20%	35%	14%
Too much money for what you get	15%	22%	5%	22%
Don't know much about computers	11%	10%	10%	12%
Security	6%	1%	11%	3%
Don't own a computer	5%	7%	4%	3%
Slow connection in my area	2%	3%	1%	3%
Not available in my area	1%	0%	3%	0%
Don't want internet	1%	0%	1%	3%
Other	13%	18%	8%	15%

Demographics

Fulltime household residents



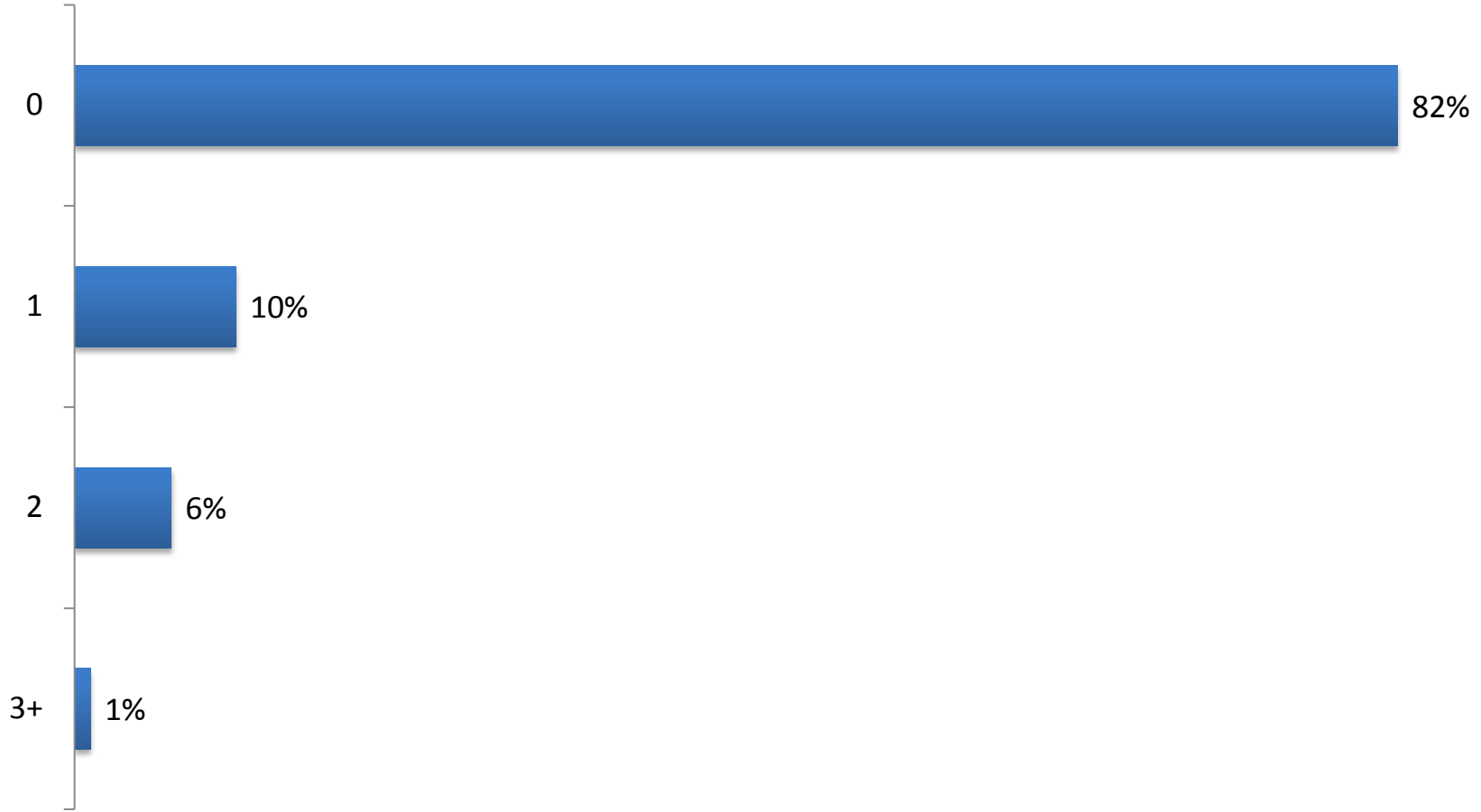
Fulltime household residents other than yourself: 18 years or younger



Fulltime household residents other than yourself: 18 years or younger

	0	1	2	3+
Total	63%	16%	14%	6%
SW Florida	69%	18%	11%	2%
Polk County	62%	18%	13%	6%
RACEC	59%	11%	19%	11%

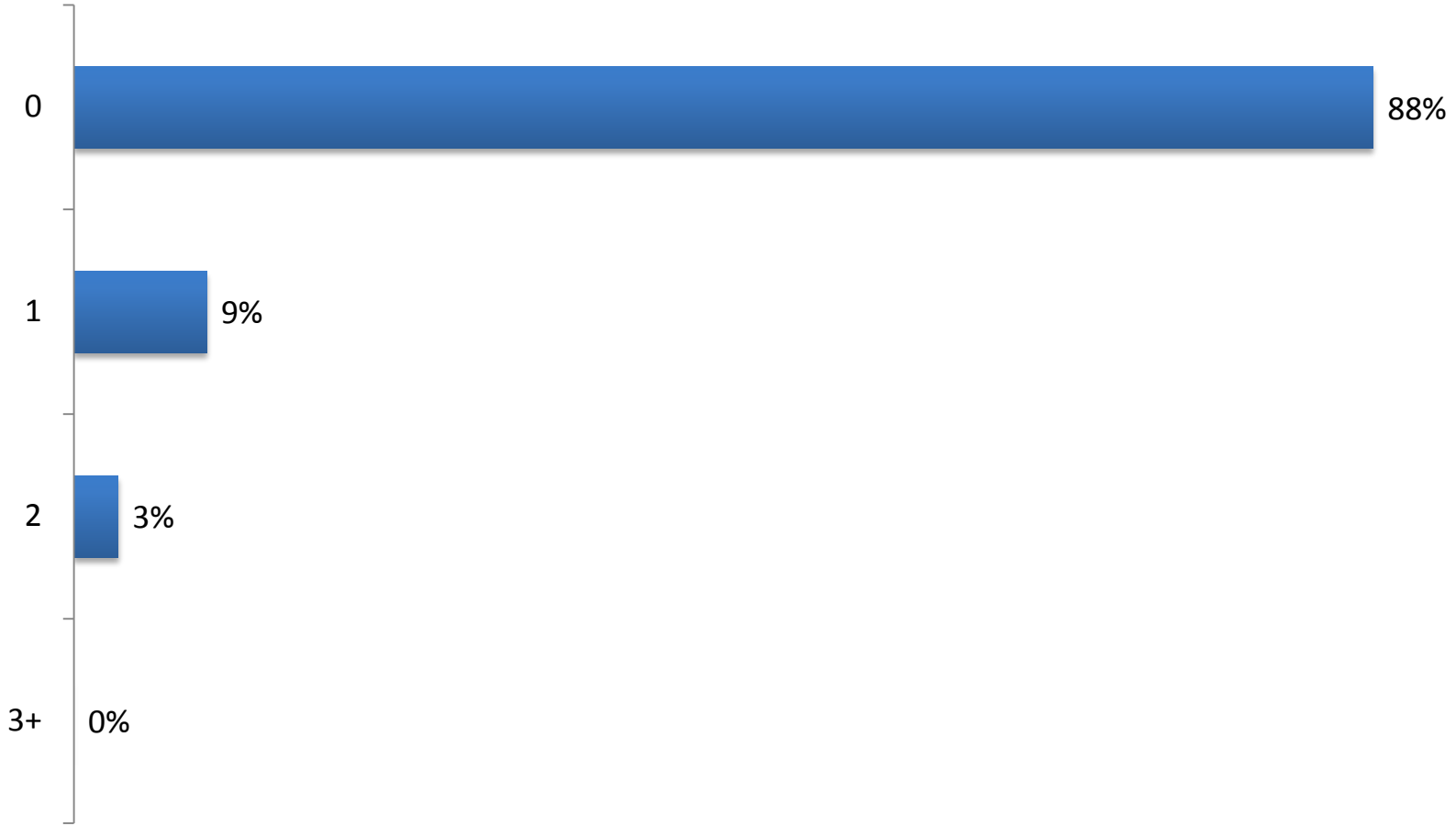
Fulltime household residents other than yourself: 19 to 24



Fulltime household residents other than yourself: 19 to 24

	0	1	2	3+
Total	82%	10%	6%	1%
SW Florida	77%	13%	7%	4%
Polk County	85%	9%	7%	0%
RACEC	86%	9%	4%	1%

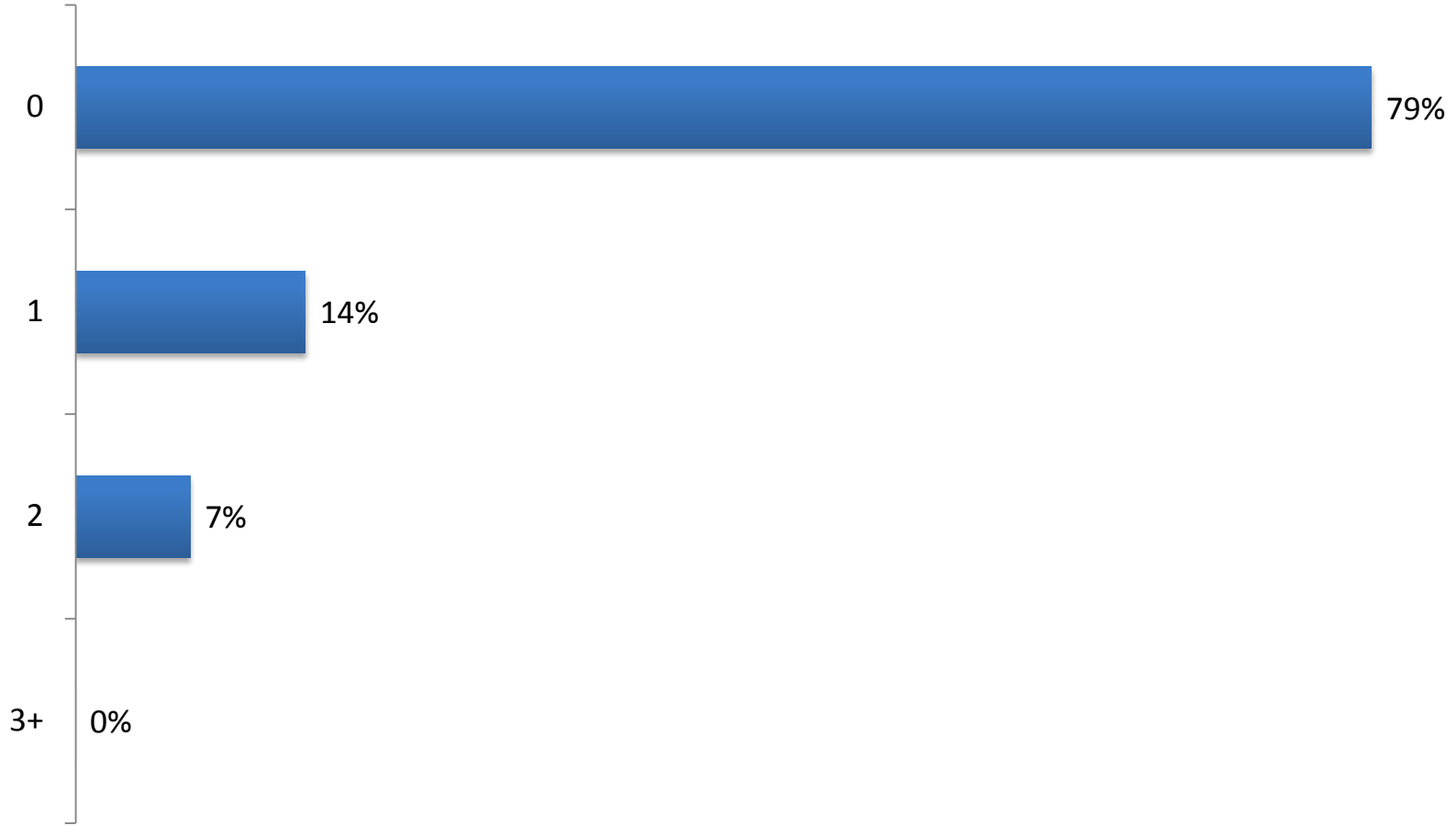
Fulltime household residents other than yourself: 25 to 29



Fulltime household residents other than yourself: 25 to 29

	0	1	2	3+
Total	88%	9%	3%	0%
SW Florida	87%	12%	1%	0%
Polk County	87%	7%	5%	1%
RACEC	90%	6%	3%	0%

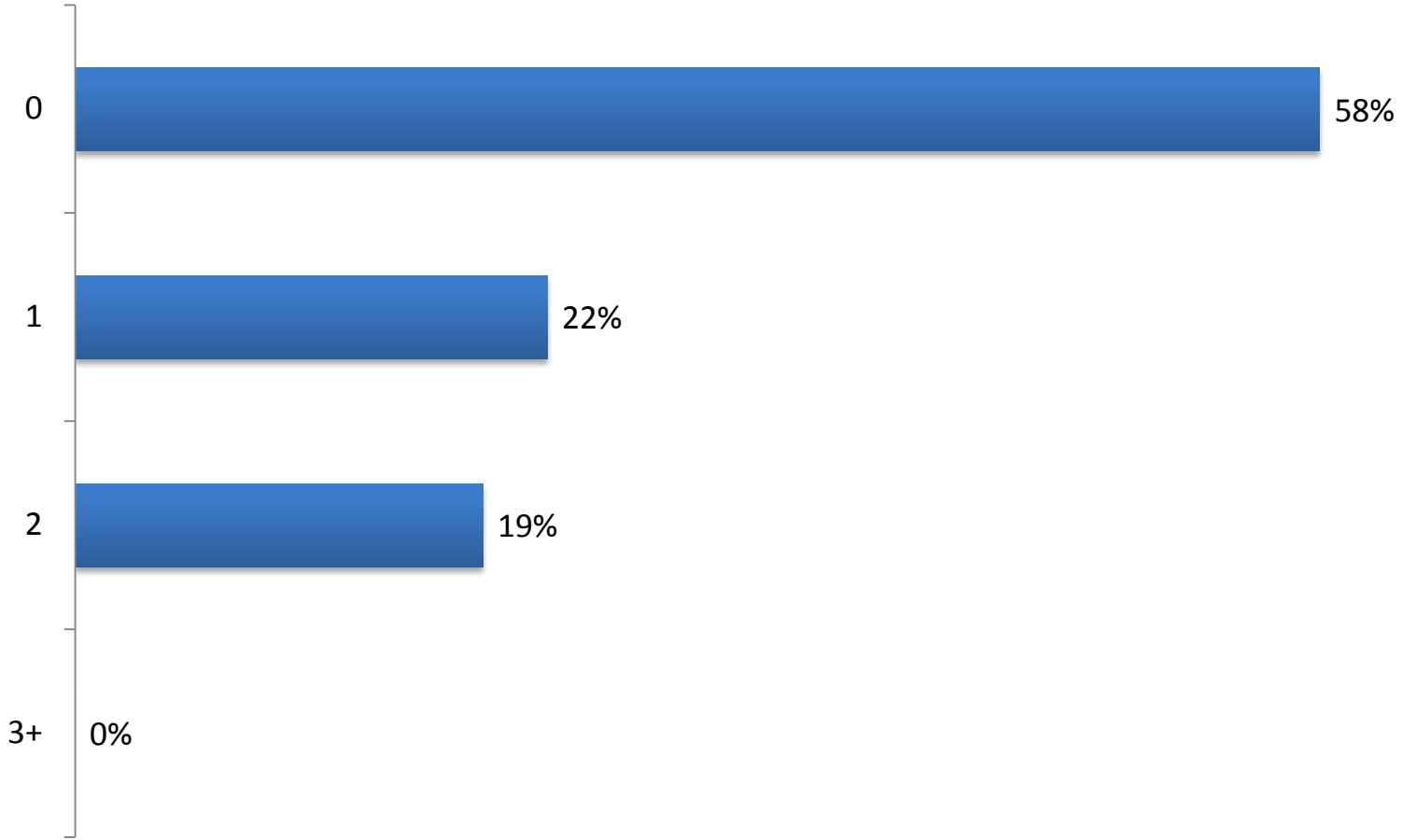
Fulltime household residents other than yourself: 30 to 39



Fulltime household residents other than yourself: 30 to 39

	0	1	2	3+
Total	79%	14%	7%	0%
SW Florida	82%	12%	6%	0%
Polk County	77%	15%	8%	0%
RACEC	78%	16%	5%	0%

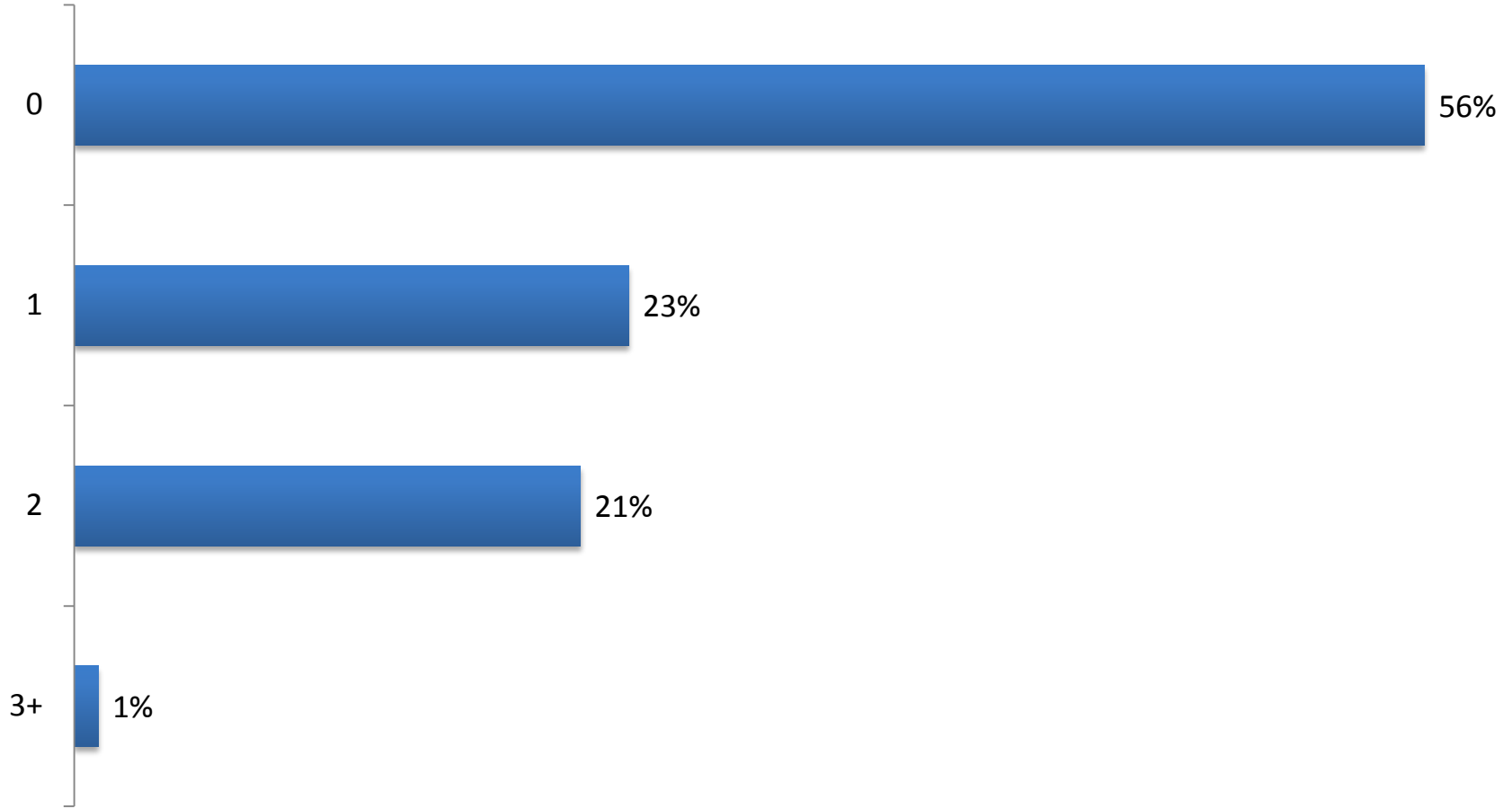
Fulltime household residents other than yourself: 40 to 59



Fulltime household residents other than yourself: 40 to 59

	0	1	2	3+
Total	58%	22%	19%	0%
SW Florida	54%	23%	22%	0%
Polk County	60%	24%	15%	0%
RACEC	60%	19%	20%	1%

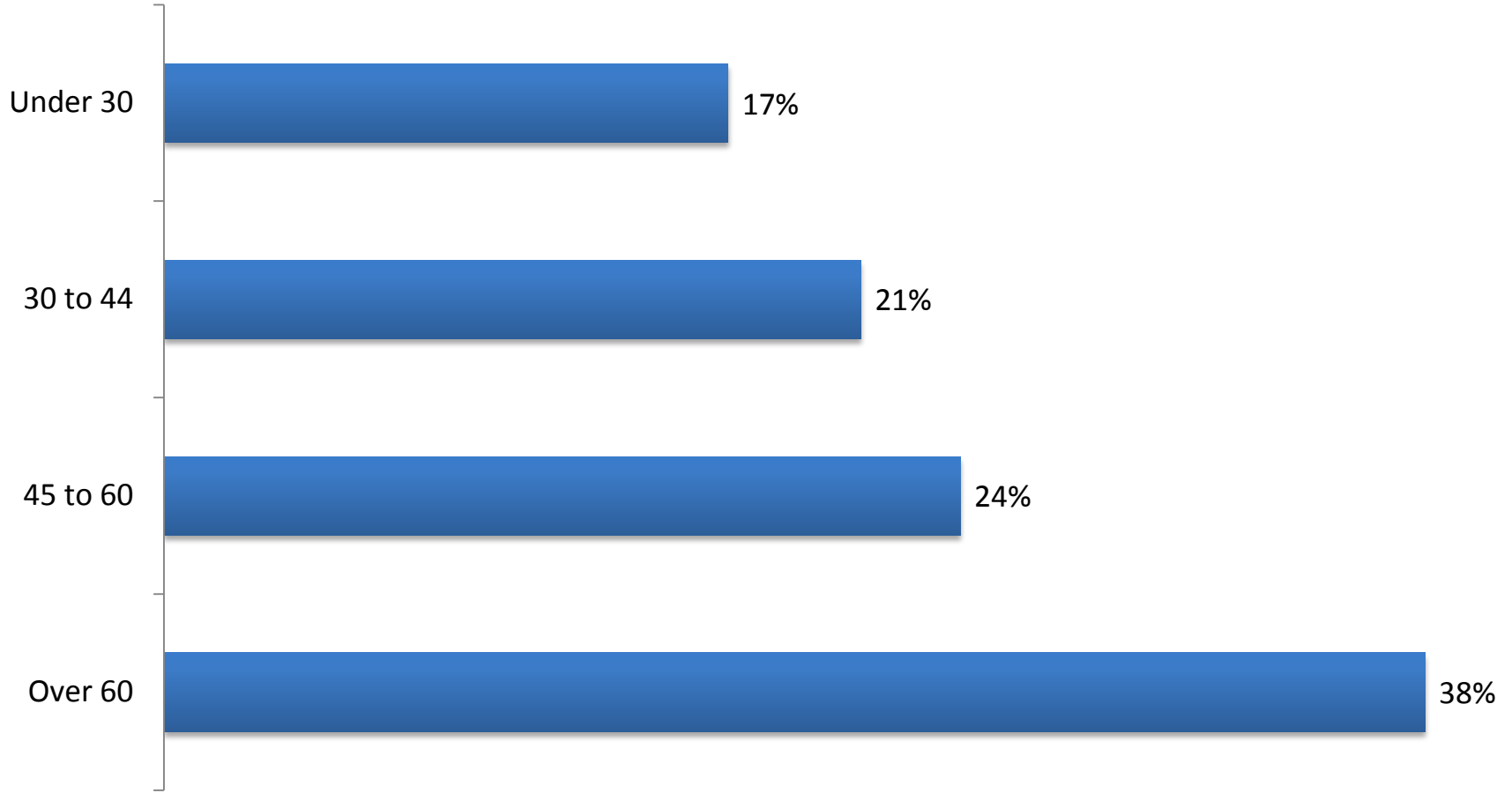
Fulltime household residents other than yourself: 60 or older



Fulltime household residents other than yourself: 60 or older

	0	1	2	3+
Total	56%	23%	21%	1%
SW Florida	60%	23%	15%	1%
Polk County	53%	25%	22%	0%
RACEC	54%	19%	25%	1%

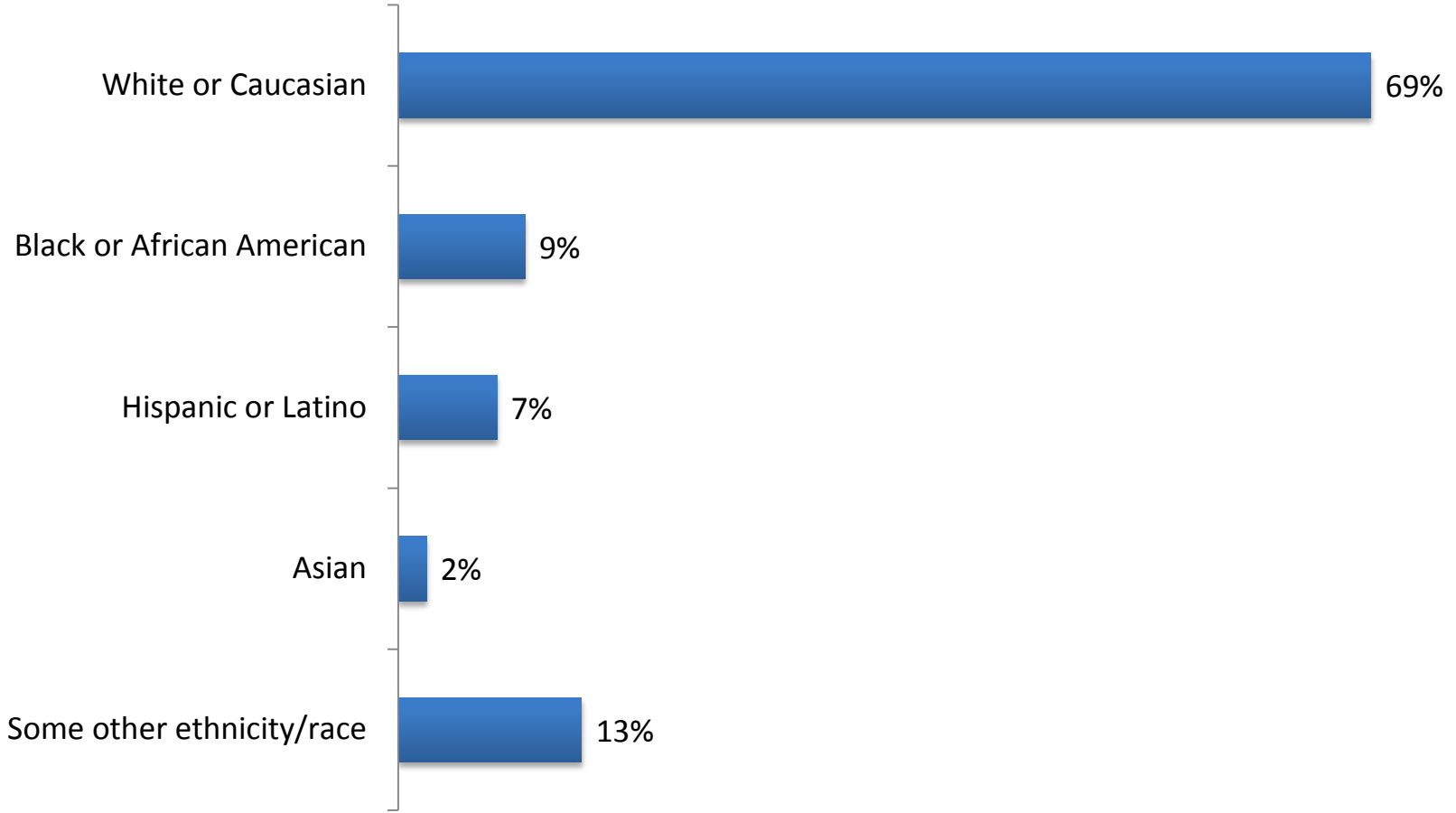
Resident's age



Resident's age

	Under 30	30 to 44	45 to 60	Over 60
Total	17%	21%	24%	38%
SW Florida	22%	14%	26%	39%
Polk County	18%	28%	19%	36%
RACEC	10%	21%	28%	41%

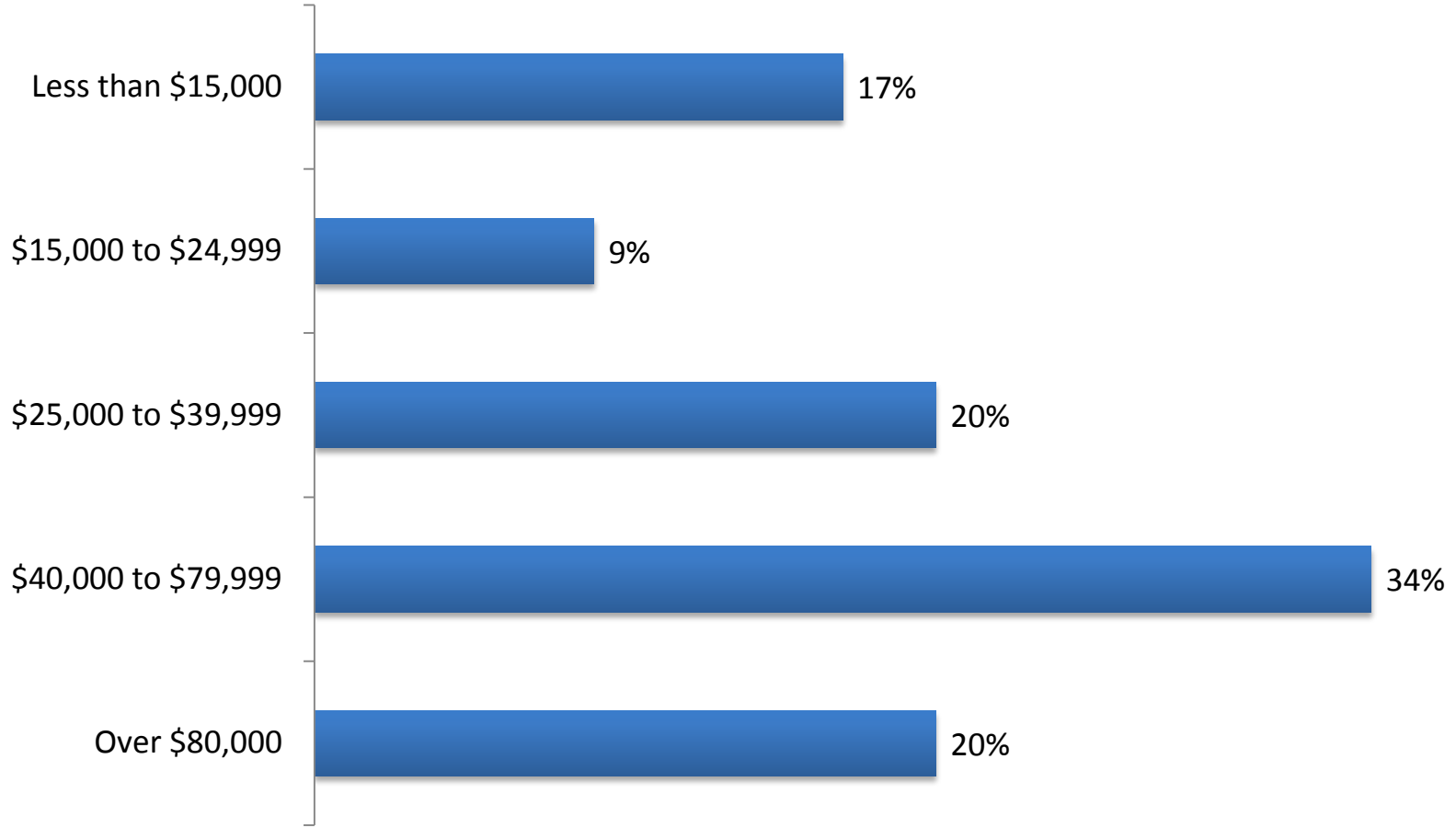
Race



Race

	White or Caucasian	Black or African American	Hispanic or Latino	Asian	Some other ethnicity/race
Total	69%	9%	7%	2%	13%
SW Florida	73%	8%	6%	3%	10%
Polk County	67%	8%	7%	0%	17%
RACEC	68%	11%	9%	2%	11%

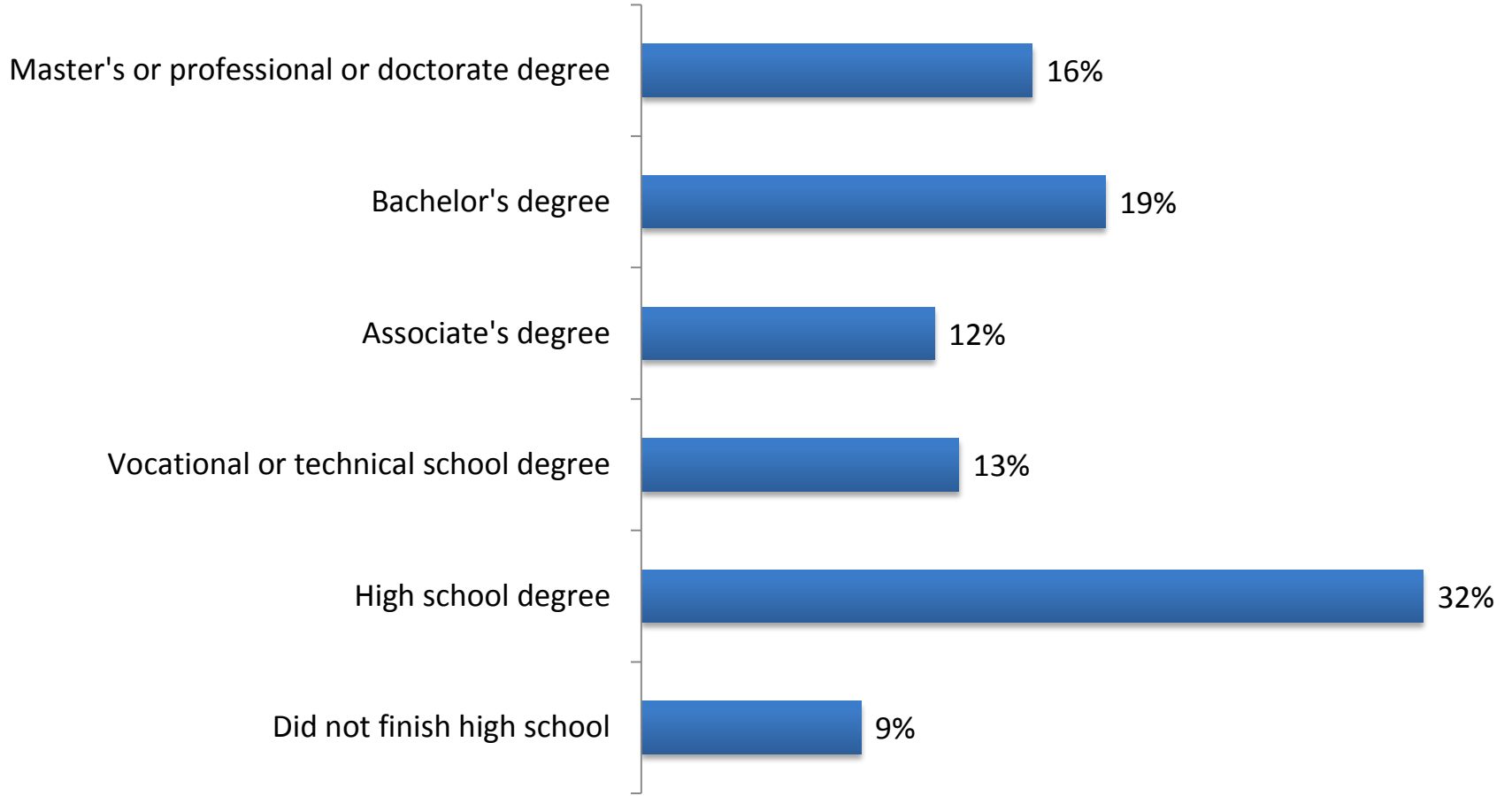
Household income



Household income

	Less than \$15,000	\$15,000 to \$24,999	\$25,000 to \$39,999	\$40,000 to \$79,999	Over \$80,000
Total	17%	9%	20%	34%	20%
SW Florida	12%	7%	17%	41%	24%
Polk County	27%	9%	16%	28%	20%
RACEC	11%	12%	26%	34%	18%

Education



Education

	Did not finish high school	High school degree	Vocational or technical school degree	Associate's degree	Bachelor's degree	Master's or professional or doctorate degree
Total	9%	32%	13%	12%	19%	16%
SW Florida	4%	32%	11%	12%	22%	19%
Polk County	13%	29%	11%	14%	21%	11%
RACEC	8%	34%	17%	10%	13%	18%

Gender



Gender

	Male	Female
Total	50%	50%
SW Florida	48%	52%
Polk County	51%	49%
RACEC	51%	49%