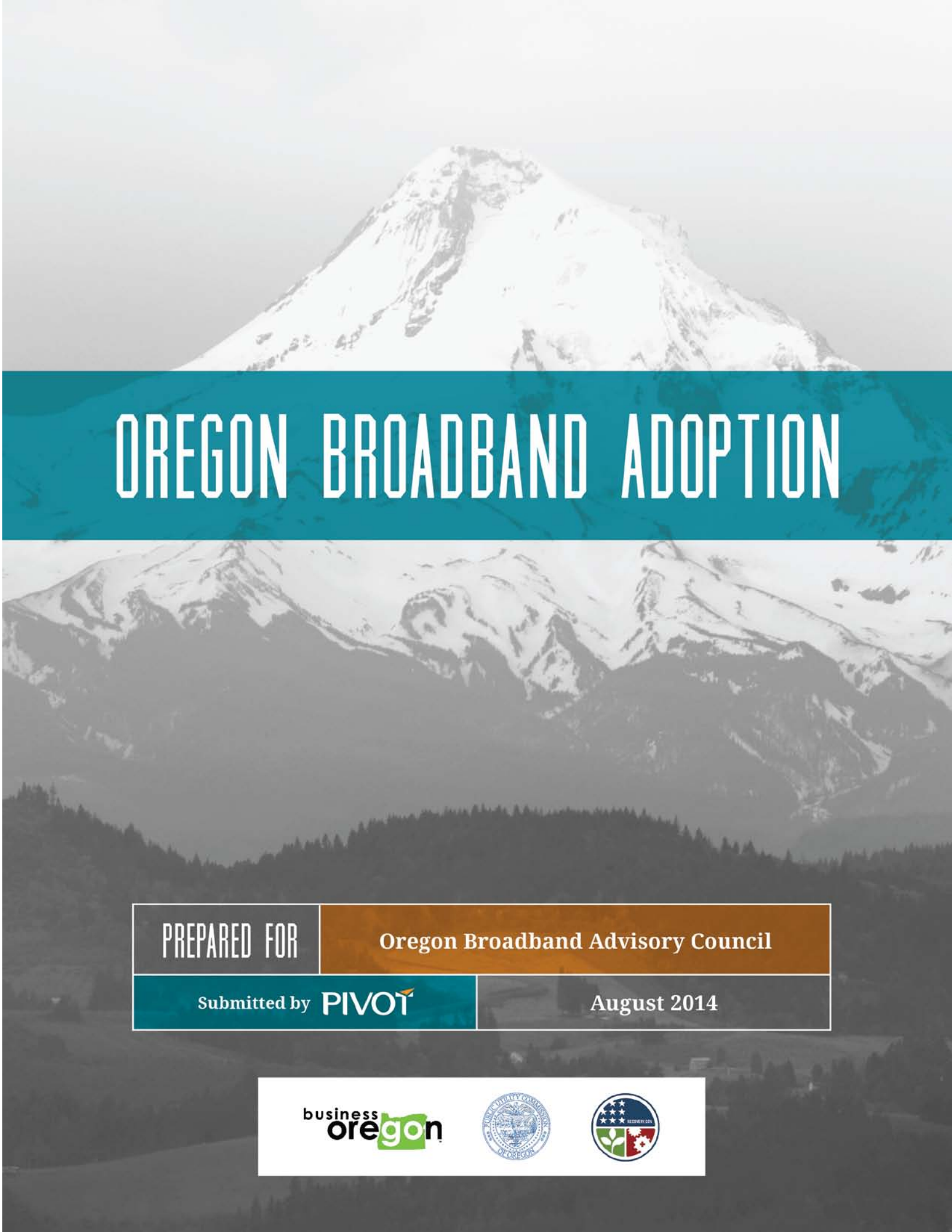

OREGON BROADBAND ADOPTION

PREPARED FOR	Oregon Broadband Advisory Council
Submitted by PIVOT	August 2014

business oregon

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About This Report

The Public Utility Commission of Oregon, using funds from its State Broadband Data and Development Program grant administered by the National Telecommunications and Information Administration, contracted with the Oregon Business Development Department (OBDD), on behalf of the Oregon Broadband Advisory Council, to perform a repeat of its 2010 telephone survey on broadband adoption in Oregon. The OBDD commissioned Pivot Group, LLC to conduct this second survey and report on the findings which are presented here.

Executive Summary

Survey Purpose and Objectives

This second survey provides Oregon-specific statewide and regional rates of:

- broadband adoption,
- computer ownership,
- service availability,
- Internet use,
- barriers to adoption,
- perceptions of cost,
- user satisfaction,

by demographics and how these factors measure against the results of the first survey and certain key broadband statistics nationally.[1] The type of devices used for Internet connection and the Internet activities being engaged were expanded in this second survey.

Internet Use

- Eighty-seven percent (87%) of adult Oregonians use the Internet, which is statistically unchanged since the 2010 study (88%). Oregon's current rate of Internet use is the same as the nationwide Internet usage rate of 87%.
- Ninety-five percent (95%) of Oregonians aged 18 to 29 use the Internet. Internet use drops significantly at age 65 or older (73%).
- Hispanics are significantly less likely than other racial/ethnic groups to use the Internet, which correlates to their lower income and education attainment compared to other groups. Internet use among this group (74%) is also significantly lower than it was in the 2010 survey (84%). Hispanics are also less likely to own any device, which correlates strongly with levels of Internet use. Device ownership among Hispanics is also lower than it was in the 2010 survey.

Findings of this survey show that an estimated 386,000 Oregon adults (13%) do not use the Internet at all, and 119,000 (4%) use the Internet only at a place away from home.

[1] National Internet and broadband usage statistics were sourced through the Pew Research Center at www.pewinternet.org.

- Compared to the 2010 findings, the South Central (-6%) and Eastern (-5%) regions of Oregon are each showing significantly lower percentages of Internet use.

Places Where Internet Users Access the Internet

- Among all users, 96% access the Internet at home. The percentage of Hispanics connecting at the public library has increased from 31% in 2010 to 45% in 2014.
- Younger adults, aged 18 to 29, are becoming increasingly mobile and comfortable accessing the Internet from virtually anywhere. Just over half of this age group connect to the Internet at four or more locations. Conversely, 55% of those aged 65 or older access the Internet only at home. Among Internet users who don't access the Internet at home, 50% access at someone else's house, 49% connect at the public library, and 35% access at work.

Primary Device Used to Access the Internet at Home

- The primary device used to access the Internet at home correlates more strongly with age than any other demographic. Forty-one percent (41%) of Internet users aged 18-29 use a smartphone as their primary connection device, while those of retirement age are more likely to use a desktop PC (57%).
- Hispanic and non-white/non-Hispanic respondents are significantly more likely than white respondents to use a smartphone as their primary device for accessing the Internet.
- Mobile / Cellular Internet access has increased significantly in the Portland area and has decreased significantly in Central Oregon as a specified connection type at home. Hispanics are significantly more likely to use only a Mobile/Cellular connection at home (29%) than white (7%) and non-white/non-Hispanic Internet users (15%).

Home Internet Connection Type

- Statewide, cable Internet service is significantly more prevalent than it was in 2010 (51% vs. 43%). Conversely, the percentage of DSL connections is significantly less common (25% vs. 34% in 2010). The greatest increases since 2010 among those who use cable are found in Northwest Coast, Southwest Oregon, and North and South Central regions. DSL is still used by over half in the Eastern Oregon region.

Home Broadband Adoption

- Statewide, home broadband adoption in Oregon is 82%. While this is above the national adoption rate of 80%, it's the same percentage observed in the 2010 survey. The percentage of home dial-up users has gone down (from 3% in 2010 to 1% in 2014). An offsetting increase has occurred, however, among Internet non-users and those using the Internet somewhere other than home (collectively, from 15% in 2010 to 17% in 2014).
- The demographic factors most correlated with home broadband adoption continue to be age, household income and educational attainment. Adults aged 18 to 49 are significantly more likely to have broadband Internet access at home compared to those aged 50 or older. Oregon seniors aged 65 and older, however, are more likely than seniors across the nation to have broadband at home (64% vs. 47%; note this excludes mobile/cellular access for national comparison purposes.)

- Higher income households and college graduates are significantly more likely to have broadband at home.
- Hispanics are less likely than other racial/ethnic groups to use the Internet. Home broadband adoption among Hispanics (66%) is also significantly lower than non-Hispanics. These findings mirror national statistics.[2]
- While statewide home broadband adoption is at 82%, just 69% of adults in South Central and 67% in Eastern Oregon subscribe to broadband service at home.

Broadband Internet Activities

- Using the Internet for social networking is significantly more common than it was in 2010, as 69% of Oregonians now perform this activity, vs. 63% in 2010. Interestingly, this increase is attributed mainly to the oldest age group, as 47% of those 65 and older have participated in social networking in the past 30 days, up from 33% in 2010. Significant increases in social networking were also observed among Hispanics and non-white/non-Hispanic Oregonians.

Internet Non-Users and Broadband Non-Adopters

- Ownership of Internet access devices is strongly correlated with Internet use, and in 2014 significantly fewer Internet non-users have a desktop, laptop or tablet PC (35% in 2010 vs. 18% in 2014).
- Notably, although smartphone adoption has skyrocketed among the Oregon population to 60%, only 8% of Internet non-users have a smartphone (The 8% is statistically the same as it was in 2010).
- A higher percentage of Internet non-users in 2014 earn less than $30K in household income (68% vs. 52% in 2010), and/or did not graduate high school (24% vs. 15% in 2010).
- Regarding shifts from 2010 by racial/ethnic groups, a higher percentage of Internet non-users include Hispanics (14% in 2010 vs. 25% in 2014).
- Among all broadband non-adopters, 40% said they've never used the Internet. This is statistically the same as in 2010. Increases have occurred in the percentage of broadband non-adopters who had home access but stopped (16% to 20%) and those who use the Internet now but not at home (12% to 17%).
- Listed below are some clues and plausible explanations why the adoption of broadband at home has not increased in Oregon over the past three years.
- Although the percentage of home dial-up users has gone down (from 3% in 2010 to 1% in 2014), an increase occurred in those who either stopped using the Internet or use the Internet somewhere other than home (from 5% to 7%). Cost continues to be a primary reason for not having home broadband service.
- Internet users who connect only from outside the home, such as at work, someone else's house or at a cafe or other business, are more likely today than in 2010 to say, "I have all the access I need through my cell phone or wireless device."

[2] http://www.pewinternet.org/fact-sheets/broadband-technology-fact-sheet/

- Compared to 2010 findings, significantly fewer Internet non-users expressed interest in using the Internet at home in the future. Waning interest is an indication that the market is nearing saturation. The majority of Oregonians, for example, who say they've never used the Internet just might never use it. In fact, nearly half of all Internet non-users— equating to 6% of all Oregonians— say they've never used the Internet and have no interest in starting.
- Computer ownership, whether it's a desktop, laptop or tablet PC, is highly correlated with home broadband use. The percentage of Oregonians who have at least one of these devices has decreased (84% in 2014 vs. 88% in 2010), while there is a corresponding increase in the percentage who have only a smartphone (5% in 2014 vs. 1% in 2010). Home broadband use among smartphone-only users is significantly lower than among those who have a desktop, laptop or tablet PC (86% vs. 97%).
- Home broadband use among Oregon Hispanics, who make up 12% of Oregon's population, is significantly lower (66% in 2014 compared to 80% in 2010). A substantially higher percentage of individuals who have never used the Internet are Hispanic.
- Significantly fewer Oregonians with less than a high school education use broadband at home (53% vs. 60% in 2010).
- Decreases in the use of dial-up in the South Central and Eastern regions were not offset by increases in home broadband use. Instead, fewer people in those regions are using the Internet at all.

Reasons for Not Using the Internet at Home

- Cost-related reasons rank highest overall, especially among not-at-home Internet users, 60% of whom rated monthly cost a four or five on a one-to-five scale. The percentage who rated the cost-related reasons a four or five is similar to the 2010 percentage.
- Among those who have never used the Internet, cost-related reasons do not rank highly, which is unchanged from 2010.
- Among those who have never used the Internet, the top reasons for non-use are related to discomfort and perceived need: "I am not comfortable using a computer" (43%), "There is nothing on the internet I want to see" (39%), and "I am worried about all the bad things that could happen" (34%). Among all respondents who don't use the Internet at home, significant increases have occurred with all reasons related to discomfort and perceived need. This supports other findings that Internet use is near saturation levels in the state overall.
- Internet users who don't use the Internet at home access from other locations, 50% access at someone else's house, 49% connect at the public library and 35% access at work. A significant increase over 2010 was observed for the reason "I have all the access I need through my cell phone or wireless device," which is likely due to the rise in tablet and smartphone use.

Interest in Using the Internet in the Future

- Among those who have never used the Internet, the percentage of those who are either somewhat or very interested has decreased significantly from 20% to 13%.
- An even wider gap exists between survey periods with regard to the percentage of broadband non-adopters who are past users. In 2010, 45% of past users were interested in using again, compared to 29% this year.

Device Ownership

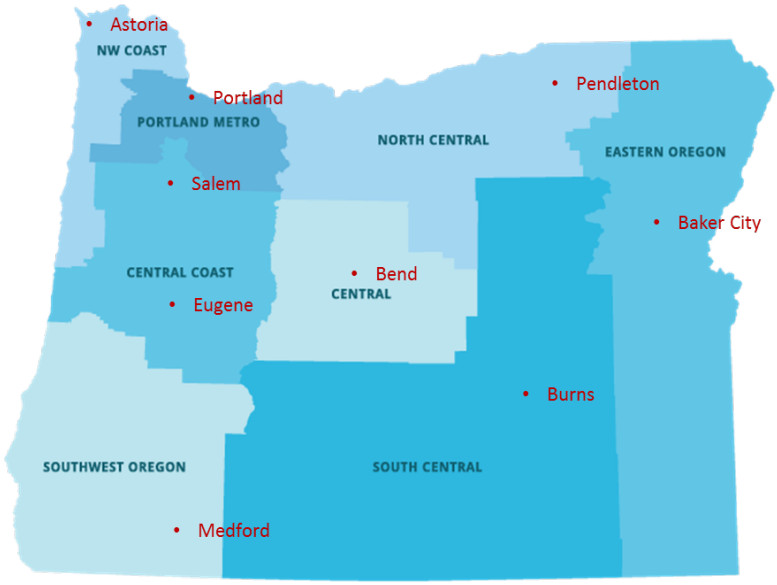
- Tablet PCs and smartphones have replaced a significant portion of desktop PCs and basic cell phones. The percentage of desktop PC owners has decreased significantly since 2010, from 72% to 57%. On the other hand, quite significant increases have occurred in the ownership of tablet PCs (8% to 42%) and smartphones (33% to 60%).
- Ownership of basic cell phones in Oregon has decreased from 54% to 31%, being replaced by smartphones. The youngest Oregonians (age 18-29) are 2.8 times more likely than someone age 65 or older to have a smartphone.
- Hispanic Oregonians are significantly less likely than other racial/ethnic groups to own a desktop, laptop or tablet PC, while they are just as likely as white adults to own a game console or smartphone. Hispanics in Oregon are significantly more likely than non-Hispanics to live in a cell-phone-only household.

Satisfaction with Internet Service

- Overall, Oregonians are generally satisfied with their Internet service. When asked to rate overall satisfaction with their service provider using a five-point scale, 75% of home broadband users rated them a four or five. There was little variance in satisfaction ratings by income, educational attainment, or by racial/ethnic group, although older respondents (65+) and female respondents were generally more satisfied.
- Notably, compared to the 2010 findings, significantly fewer respondents rated connection speed a four or five on a five-point scale.
- Residents with broadband access in Portland Metro and the Central Coast regions are significantly less satisfied with their connection speeds compared to four years ago. Portlanders are also significantly less satisfied with their connection reliability in 2014 compared to 2010. South Central Oregon was the only region that saw any improvement in satisfaction ratings across the board. In 2010, this region had among the lowest satisfaction levels in the state. Overall satisfaction across the state does not vary much by region, although South Central Oregon is trending higher and Eastern Oregon is trending lower.

Methodology

Data for the 2014 Oregon Broadband Adoption Survey were collected using telephone surveys conducted in February and March of 2014 among Oregon residents age 18 or older. With the increasing prevalence of cell-phone-only and cell-phone-primary households, inclusion of cell phones in the sample was necessary to collect accurate and reliable data from a random sample of households. An estimated 38% of Oregonians now live in a cell-phone-only household.[3] Strict dialing protocols were used to maximize response rates and to ensure that the data represent all Oregonians.



A total of 4,017 surveys was completed statewide—2,860 with a random-digit-dial (RDD) sample of landline telephone numbers and 1,157 with a random sample of cell phone numbers—resulting in a margin of error for the entire sample no greater than plus or minus 1.5 percent points at a 95% confidence level. A sample of this size allows for analysis of variances in responses between different segments. A total of 138 surveys was completed in Spanish by multi-lingual interviewers, using a translated version of the survey.

To confidently assess differences in key measures in different areas of the state, the sample targeted eight geographic areas, with between 373 and 532 interviews completed in 7 of the 8 regions identified. Due to the size and diversity within the Portland metropolitan area, 1,024 interviews were completed there to capture the most representative sample of this region. The same regions used in 2010 were again used in 2014 for comparison purposes. Interviews were completed with a randomly selected adult in the household 18 years of age or older.

Data were weighted in the same way as 2010, within each region so that the distribution of the sample reflects the target population and acts as a nonresponse correction. Weighting adjusts for distribution of age by gender and by race or ethnicity, and for cell-phone-only and cell-phone-primary households.

The questionnaire was developed in 2010 based on a review of other relevant research conducted nationwide. Key sources at that time included:

- Federal Communications Commission, Broadband Adoption and Use in America, OBI Working Paper Series No. 1, February 2010
- Pew Research Center, Home Broadband 2010
- Other states' research conducted as part of the Connected Nation program

[3] http://www.cdc.gov/nchs/data/nhis/earlyrelease/wireless201407.pdf

To achieve a demographic representation consistent with the 2010 survey for reporting time series data, the same sampling quotas were strictly adhered to. It is important to note that the sampling result for the Hispanic population in 2014 is closer to the actual state breakdown of this demographic (based on the most recent American Community Survey) but the 2014 sampling is three times larger than the Hispanic representation in 2010. This report considers this disparity and includes key differences and trends that pertain to Oregon's Hispanic population.

Minor changes were made to the 2010 questionnaire in 2014 to encourage respondents to describe more accurately the following:

1) devices used to connect to the Internet,
2) Internet activity and behavior,
3) a basic definition of Internet speed package they purchased, and
4) rate overall satisfaction with their Internet provider in addition to satisfaction with attributes of their Internet service.

The survey averaged 16 minutes in length.

Identifying Significant Differences

Throughout this report, differences between regions, demographic and behavioral segments are identified and described. Such differences are specifically highlighted when statistically significant at a 95% confidence level (likely to actually exist in the population), using color-shaded cells: yellow for the higher or highest numbers and orange for the lower or lowest numbers in tables with percentages, means and 2010-to-2014 differentials. Significant differences between any specific two segments can be found in this survey's cross tabulation data tables.

Internet Use

Eighty-seven percent (87%) of Oregonians use the Internet, which is statistically unchanged since the 2010 study (88%). Oregon's current rate of Internet use is the same as the nationwide Internet usage rate of 87%.[4]

Internet Use by Age Group

Ninety-five percent (95%) of Oregonians aged 18 to 29 use the Internet. Internet use drops significantly at age 65 or older (73%). No statistical changes have occurred since 2010 in any particular age group. Internet use among Oregon's oldest age group (65+) is significantly higher than nationwide Internet use within that age group (73% vs. 57%).[5]

	Total	18-29	30-49	50-64	65+
Oregon Internet Use 2014	87%	**95%**	**92%**	87%	73%
Difference from 2010	-1%	-2%	+1%	-1%	+2%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Internet Use by Household Income

At 98%, Internet use among those in the highest income bracket is near saturation. Those in the lowest income bracket (78%) are significantly less likely to use the Internet. However, that group's Internet use has increased six percentage points (from 72% in 2010). Oregon's Internet use by household income is similar to the nationwide breakdown by household income.[6]

Note these figures exclude people who didn't want to disclose their income, which made up 25% of all respondents in the survey. Among those 25%, Internet use decreased by two percentage points, which is why the total percentage is down one point despite all four income groups showing increases. (Again, change in Internet use between 2010 and 2014 is not statistically significant.)

	Total	< $30K	$30K - $49.9K	$50K - $74.9K	> $75K
Oregon Internet Use 2014	87%	78%	90%	**96%**	**98%**
Difference from 2010	-1%	+6%	+4%	+2%	+1%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

[4] http://www.pewinternet.org/2014/02/27/summary-of-findings-3/
[5] http://www.pewinternet.org/files/2014/02/12-internet-users-in-2014.jpg
[6] http://www.pewinternet.org/files/2014/02/12-internet-users-in-2014.jpg

Internet Use by Education

Oregonians with at least some college education are significantly more likely than those with high school or less education to use the Internet. Moreover, Internet use is lower than it was in 2010 among Oregonians with less than a high school education (from 66% to 61%) and higher among high school grads (from 77% to 82%). The breakdown of Oregon's Internet use by educational attainment is similar to nationwide figures.[7]

	Total	Some High School	High School	Some College	College Grad
Oregon Internet Use 2014	87%	61%	82%	**91%**	**95%**
Difference from 2010	-1%	-5%	+5%	+1%	-1%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Internet Use by Race/Ethnicity

Hispanics are significantly less likely than other racial/ethnic groups to use the Internet. Furthermore, Internet use among this group (74%) is significantly lower than it was in the findings of the 2010 survey (84%). Internet use among Hispanics in Oregon is also lower than Internet use among Hispanics nationwide.[8]

	Total	White	Hispanic	Non-white/Non-Hispanic
Oregon Internet Use 2014	87%	89%	74%	91%
Difference from 2010	-1%	+1%	-10%	0%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Internet Use by Region

Internet use continues to be more prevalent in the Portland area and Central Oregon. Compared to 2010 findings, Internet use stayed exactly the same in Portland and the North Central region, and statistically the same in the Southwest and Central Oregon regions. The Northwest Coast experienced an increase, and the South Central (-6%) and Eastern (-5%) regions are each showing significantly lower percentages of use.

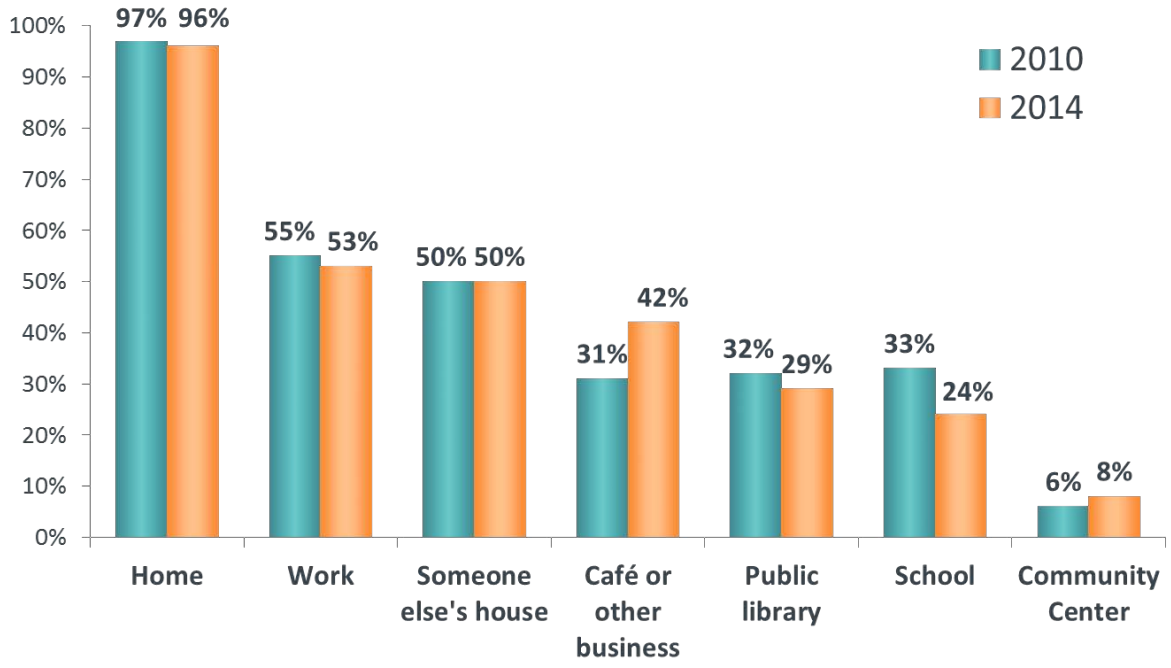
	Total	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern
Oregon Internet Use 2014	87%	86%	**90%**	87%	85%	80%	**90%**	76%	75%
Difference from 2010	-1%	+3%	0%	-2%	+1%	0%	-1%	-6%	-5%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

[7] http://www.pewinternet.org/files/2014/02/12-internet-users-in-2014.jpg
[8] http://www.pewinternet.org/files/2014/02/12-internet-users-in-2014.jpg

Places Where Internet Users Access the Internet

Among all users, 96% access the Internet at home. About half of all Internet users connect at work and half connect at someone else's house. An increase in users connecting at a café or other place of business (from 31% to 42%) is due to those under age 50, and likely because of the increase in overall mobile connectivity options as well as mobile device usage (i.e., smartphones, tablets, laptops, etc.). Finally, fewer users are connecting at the public library (29% vs. 32% in 2010) or at school (24% vs. 33% in 2010).



Internet use at work correlates with the type of job one performs. For example, people working at a retail store or restaurant, in construction, or at a manufacturing plant are less likely to use the Internet at work. The percentage of younger Oregonians (18-29) accessing the Internet at the public library decreased from 49% to 41%. The percentage of Hispanics connecting at the public library, however, rose from 31% to 45%. Increases in connecting at a café or other place of business occurred in all regions except South Central and Eastern where it was statistically the same.

Of all who are employed, 73% access the Internet at work, and of all students, 84% access at school.

Younger adults aged 18 to 29 are becoming increasingly mobile and comfortable accessing the Internet from virtually anywhere. Just over half of this age group connect to the Internet at four or more locations. Conversely, 55% of those aged 65 or older access the Internet only at home. Among all Internet users who don't access the Internet at home (regardless of age), 50% access at someone else's house, 49% at the public library, and 35% at work.

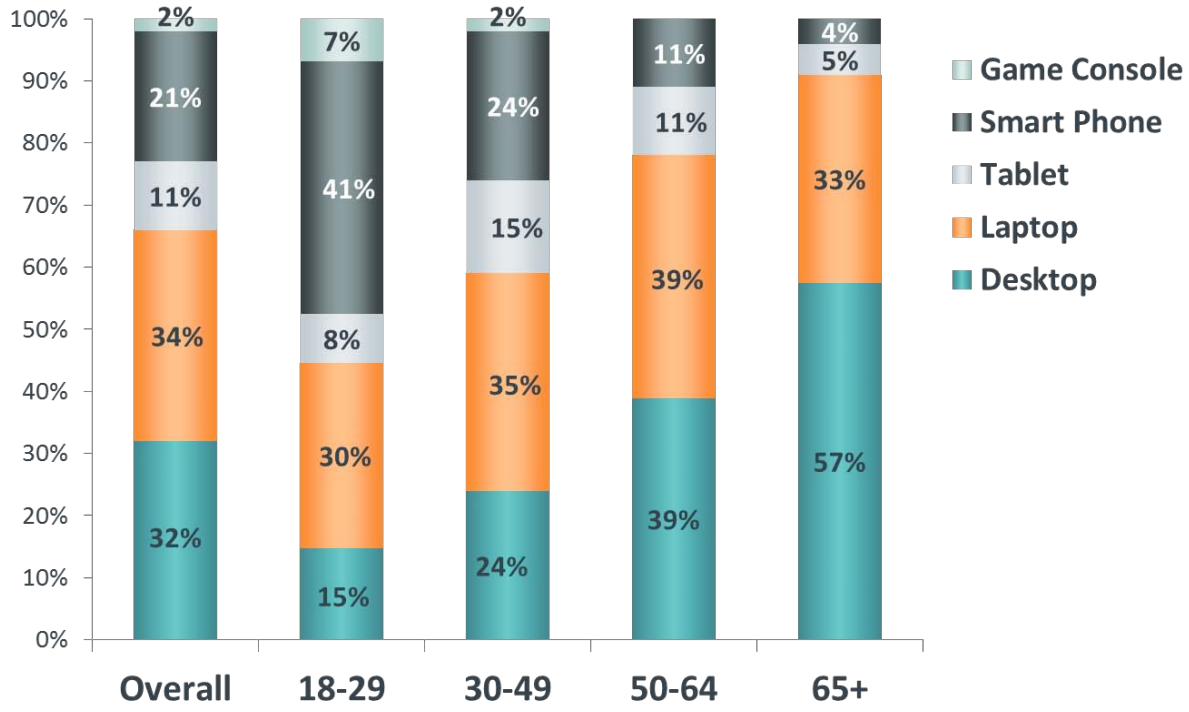
Oregonians whose income is under $30K are more likely to use the Internet at a public library. College grads are more likely than those with lower education to access at a café or other type of business.

Primary Device Used to Access the Internet at Home

The primary device used to access the Internet at home correlates more strongly with age than any other demographic. As detailed in the chart below, younger age groups are significantly more likely than older Oregonians to use smartphones as their primary connection device, while older age groups are more apt to use a desktop PC. Tablet PCs are more common among the middle-aged as this group is more likely to own a tablet PC as a third or fourth device (This middle-aged group also has more device users per household).

Among all Oregonians who have either a Desktop, Laptop or Tablet PC, 97% are Internet users. This is up from 95% in 2010, a significant increase.

Game consoles are a primary means of connecting for 7% of those under 30 and their use is non-existent among those aged 50 and older. Notably, among those who have only a smartphone and no other Internet capable device, 86% use the Internet.

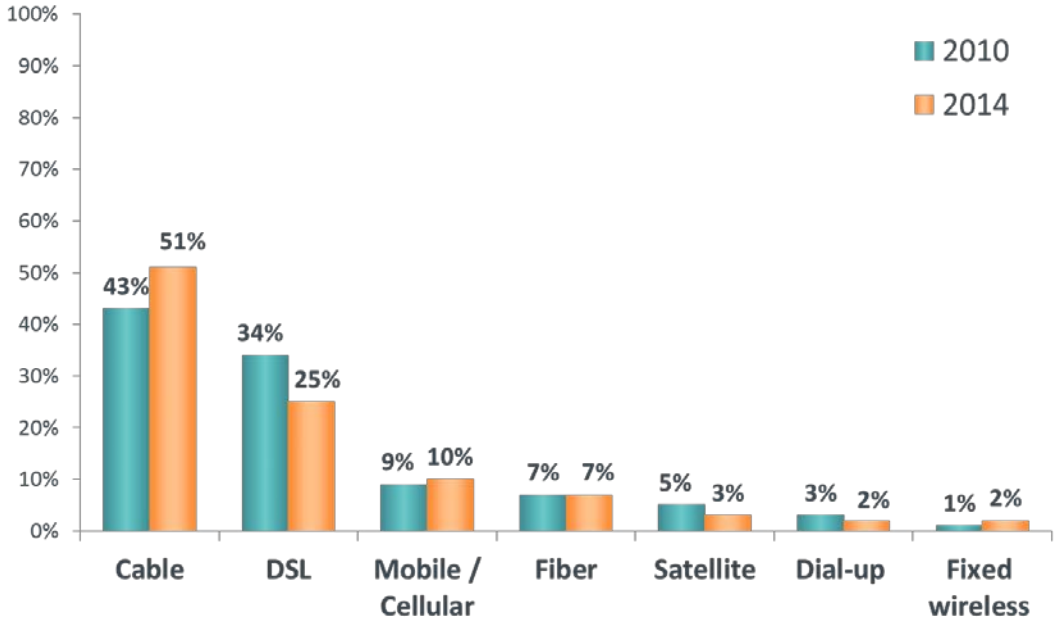


Hispanic and non-white/non-Hispanic respondents are significantly more likely than white respondents to use a smartphone as their primary device for accessing the Internet. This finding mirrors national data on the subject. According to the Pew Research Center's Internet & American Life Project, Hispanics are more likely to access the Internet on their phones than white adults.[9] [10] [11]

[9] http://www.pewhispanic.org/2013/03/07/closing-the-digital-divide-latinos-and-technology-adoption/
[10] http://www.pewinternet.org/2014/02/27/part-1-how-the-internet-has-woven-itself-into-american-life/
[11] http://www.pewinternet.org/2013/09/16/main-findings-2/

Home Internet Connection Type

Statewide, cable Internet service is significantly more prevalent than it was in 2010 (51% vs. 43%). Conversely, the percentage of DSL connections is significantly less common (25% vs. 34%).



Home Internet Connection Type by Region

Cable is more common in Portland (56%) and Southwest Oregon (53%), and less common in Eastern Oregon (18%). Compared to 2010, cable was specified as a connection type by a significantly greater percentage of users in the Northwest Coast, Southwest Oregon, and North and South Central regions. DSL is still used by over half of subscribers in the Eastern Oregon region. Mobile/Cellular Internet access has increased significantly in the Portland area and has decreased significantly in Central Oregon.

	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Cable	43%	**56%**	49%	**53%**	36%	42%	51%	18%
DSL	36%	20%	28%	24%	37%	38%	32%	**56%**
Mobile / Cellular	9%	10%	13%	9%	17%	5%	7%	5%
Fiber	5%	10%	5%	4%	2%	2%	3%	5%
Satellite	3%	1%	2%	6%	4%	6%	5%	9%
Dial-up	4%	1%	2%	2%	2%	3%	2%	6%
Fixed wireless	0%	2%	2%	1%	2%	3%	0%	0%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Home Internet Connection Type by Race/Ethnicity

Hispanics are significantly more likely to use only a Mobile/Cellular connection at home (29%) than white (7%) and non-white/non-Hispanic Internet users (15%). Nationally, Hispanics are twice as likely as white Internet users to be "cell-mostly" Internet users, meaning they *mostly use their cell phone* to access the Internet, as opposed to some other device.[12]

Primary Home Internet Connection Type (base=Internet users)	White	Hispanic	Non-white/Non-Hispanic
Cable	52%	38%	50%
DSL	27%	16%	22%
Mobile / Cellular	7%	**29%**	15%
Fiber	7%	9%	10%
Satellite	3%	2%	1%
Dial-up	2%	3%	0%
Fixed wireless	2%	2%	1%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

[12] http://www.pewinternet.org/2013/09/16/main-findings-2/

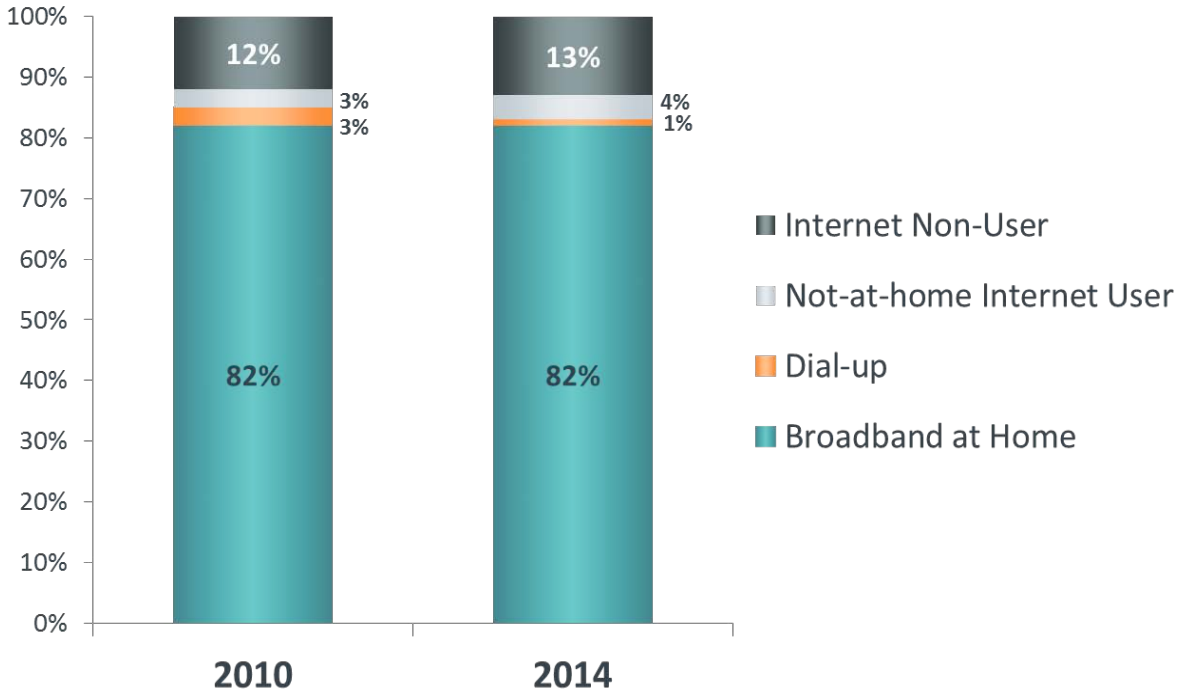
Broadband Adoption

The percentage of adults who use broadband Internet at home (82%) remains unchanged since the 2010 Oregon Broadband Adoption Survey. It is still, however, above the national average of 80%.

The percentage of home dial-up users has gone down (from 3% in 2010 to 1% in 2014). An offsetting increase has occurred, however, among Internet non-users and those using the Internet somewhere other than home (collectively, from 15% in 2010 to 17% in 2014).

The demographic factors most correlated with home broadband adoption continue to be age, household income and educational attainment. These factors are described on the following pages.

Among all Internet users, 94% use broadband at home. The remaining 6% are either dial-up users or they use the Internet only outside of the home.



Broadband Status by Age

Adults aged 18 to 49 are significantly more likely to have broadband Internet access at home compared to those aged 50 or older. A significantly lower percentage of those 65 or older have broadband at home (68%). These Oregon seniors, however, are more likely than seniors across the nation to have broadband at home. Excluding mobile/cellular access for national comparison purposes, 64% of Oregon seniors vs. 47% of this age group nationwide use broadband at home.[13] [14]

Broadband Status	Total	18-29	30-49	50-64	65+
Broadband at home	82%	**90%**	**87%**	82%	68%
Not-at-home Internet User	4%	5%	4%	4%	3%
Dial-up	1%	1%	1%	1%	**3%**
Internet Non-user	13%	5%	8%	13%	**27%**

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Broadband Status by Household Income

There are strong correlations between household income and the adoption of home broadband connections. Oregonians earning under $30K annually are significantly less likely to have a home broadband connection than even those in the next highest income bracket ($30K to $49.9K). They are more likely to be Internet non-users (22%), or use the Internet somewhere else besides home (8%). Among those earning over $75K annually, home broadband adoption is near saturation statewide.

Broadband Status	Total	< $30K	$30K -$49.9K	$50K - $74.9K	> $75K
Broadband at home	82%	68%	85%	**92%**	**97%**
Not-at-home Internet User	4%	**8%**	3%	3%	1%
Dial-up	1%	2%	2%	1%	1%
Internet Non-user	13%	**22%**	10%	4%	2%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

[13] http://www.pewinternet.org/2014/04/03/older-adults-and-technology-use/

[14] Some of the sources used for national comparisons do not count mobile/cellular users as broadband users.

Broadband Status by Educational Attainment

Those who have an AA degree, some college, a college degree or higher are more likely to have broadband at home. Not-at-home Internet users and dial-up users do not measurably correlate with education attainment level.

Broadband Status	Total	Some High School	High School	Some College	College Grad
Broadband at home	82%	53%	75%	85%	**93%**
Not-at-home Internet User	4%	6%	6%	4%	2%
Dial-up	1%	2%	1%	2%	1%
Internet Non-user	13%	**39%**	18%	9%	5%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Broadband Status by Race/Ethnicity

Hispanics are less likely than other racial/ethnic groups to use the Internet. Home broadband adoption among Hispanics (66%) is significantly lower than non-Hispanics. Excluding mobile-only home broadband users, 48% of Oregon's Hispanic population accesses broadband at home, compared to 56% of Hispanics nationwide.[15] [16]

Broadband Status	Total	White	Hispanic	Non-white/Non-Hispanic
Broadband at home	82%	85%	**66%**	85%
Not-at-home Internet User	4%	1%	2%	0%
Dial-up	1%	3%	6%	6%
Internet Non-user	13%	11%	**26%**	9%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

[15] http://www.pewinternet.org/2013/09/16/main-findings-2/
[16] http://www.pewinternet.org/fact-sheets/broadband-technology-fact-sheet/

Broadband Status by Region

As seen in the table below, use of broadband at home is highest in the Portland, Central Coast and Central Oregon regions. While statewide home broadband adoption is at 82%, just 69% of adults in South Central and 67% in Eastern Oregon subscribe to broadband service at home. In these mostly rural regions, the percentage without broadband is significantly higher than the statewide figure of 13%.

Broadband Status	Total	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern
Broadband at home	82%	78%	**85%**	**83%**	79%	76%	**83%**	69%	67%
Not-at-home Internet User	4%	6%	4%	2%	4%	3%	5%	6%	4%
Dial-up	1%	3%	1%	1%	2%	1%	2%	1%	**4%**
Internet Non-user	13%	14%	10%	13%	15%	**20%**	10%	**24%**	**25%**

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Broadband Internet Activities

The table below shows the percentage of home broadband users who have performed each Internet activity within the past thirty days, along with the percentage-point difference from 2010. Checking email is by far the most common activity overall. The percentage (91%) is lower, however, than it was in 2010. Examining demographic differences shows Hispanics and those with less than a high school education are the greatest contributors to this difference.

Using the Internet for social networking is significantly more common than it was in 2010, as 69% of Oregonians now perform this activity, vs. 63% in 2010. What's interesting is this increase is attributed mainly to the oldest age group, as 47% of those 65 and older have participated in social networking in the past 30 days, up from 33% in 2010. Significant increases in social networking were also observed among Hispanics and non-white/non-Hispanic Oregonians.

Using the Internet to get public safety information increased by 21 percentage points, the greatest difference observed from 2010 for any single activity. A logical explanation for this increase is that the 2014 survey was fielded at the tail end of the winter months, so a greater number of people had recently checked weather and road conditions.

Searching for information on schools is six percentage points lower. This may also be seasonally affected as the 2014 survey was fielded further into the school year.

Getting environment-related information and/or monitoring energy use in the home is five percentage points higher than in 2010.

Lastly, these Internet activities were performed significantly less in 2014 than in 2010: reading or watching the news, obtaining information from a government Web site, and looking for a job.

Activity Using Broadband at Home	2014	Difference from 2010
Check email	91%	-5%
Research prices	74%	-2%
Online Banking	70%	0%
Social networking	69%	**6%**
Read or watch news	69%	-4%
Find local businesses or events	69%	1%
Entertainment such as TV, videos or gaming	65%	2%
Download or stream music	57%	*n/a**
Get public safety info such as road conditions, closures, etc.	57%	**21%**
Buy or sell goods / services	53%	-1%
Obtain information from government website	52%	-4%
Get healthcare or medical information	49%	2%
Activities relating to my current job	45%	-2%
Read sports news or scores	43%	*n/a**
Educational or training purposes	40%	-1%
Get information on schools	30%	-6%
Read stock market and related financial news	29%	*n/a**
Information on the environment and/or monitor energy use in home	24%	**5%**
Look for a job	22%	-4%
Control heating, cooling, or other energy systems in home	4%	1%

**New activity added to the list in 2014.*
Differential percentages shaded in yellow are significantly higher than 2010 percentages and those shaded in orange are significantly lower.

Internet Activity – Differences by Demographics

Below are additional noteworthy findings by demographic segments regarding Internet activities performed by home broadband adopters:

- Age is strongly correlated with social networking, downloading and streaming music, and using the Internet to look for a job. Younger age groups are more likely to use the Internet for these activities than older respondents.
- Home broadband users between 30 and 49 years old are more likely than other Oregonian adults to read or watch the news online (74%).
- Those with higher household incomes and educational attainment are more likely to use the Internet to check their email, use online banking services, find local events or services, and for activities related to their current job.
- Those earning less than $30K annually are more likely than higher income earners (32%) to use the Internet to look for a job.
- Home broadband users earning over $75K annually are significantly more likely than those with lower income (68%) to get public safety information online.
- Hispanic home broadband users are significantly less likely than others to go online to check their email, find local businesses or events, get healthcare or medical information, seek activities related to their current job, or to read stock market and related financial news.
- Hispanic home broadband users are significantly more likely than other racial / ethnic groups to use the Internet to read sports news or scores (59%). Notably, college graduates are also significantly more likely than those with less education to read sports news and scores online (51%).
- White home broadband users are significantly less likely than other race/ethnicity groups to use the Internet for educational purposes and to get information on schools, colleges, and universities.

Attitudes Toward the Internet

Agreement with Attitudinal Statements

Respondents were asked whether they agree or disagree (somewhat or strongly) with each of seven statements. The table shows the mean ratings and how they compare between 2014 and 2010 Internet users. Means scores are based on a 1 to 4 scale where 1 means "strongly disagree" and 4 means "strongly agree."

Agreement that the Internet is a valuable source for information and learning has increased significantly. On the other hand, agreement that the Internet makes people more productive has decreased. This decrease may be due, at least in part, to the increase in social media activities.

	Internet User 2010	Internet User 2014
INTERNET VALUE		
Internet is a valuable source for information and learning	3.44	**3.75**
People can be more productive using the Internet	**3.85**	3.41
It is important for children to learn how to use the Internet	3.59	3.57
The Internet makes shopping and buying much more convenient	n/a	3.48
INTERNET SAFETY		
The Internet is too dangerous for children	2.61	2.74
There is too much pornography and offensive material on the Internet	3.37	3.24
It is too easy for my personal information to be stolen online	3.06	3.12

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Opinions Regarding the Importance of Broadband

Respondents were asked to rate the importance of broadband using a five-point scale where one means "not at all important" and five means "very important." Two statements were read to them, one regarding the importance of high-speed Internet access to them personally, and the other regarding how important it is for all Oregonians to have high-speed Internet access. Compared to 2010, Internet users rated all households in Oregon having access significantly higher in importance. The importance of having personal access to high-speed Internet is statistically unchanged between 2010 and 2014.

	Internet User 2010	Internet User 2014
It's important that all households in Oregon have access to high-speed Internet such as DSL or Cable	3.63	**3.81**
It's important that you, personally, have access to high-speed Internet such as DSL or Cable at home	4.34	4.30

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Some interesting demographic differences were also noted. Hispanic Internet users rate the importance of personal access significantly less (4.12) compared to white (4.32) Internet users. On the other hand, Hispanic Internet users place a significantly higher value on providing high-speed Internet access to all Oregon households (4.00) than White users (3.78). Also of note, more affluent Oregonians (earning $75K or more vs. less than $75K annually) are strong advocates of having high-speed Internet access available to all households across the state (3.98).

Concerns about Internet Safety

Respondents were asked to rate their level of concern about Internet safety, using a five-point scale where one means "not at all concerned" and five means "very concerned." Compared to 2010, Oregon Internet users are significantly less concerned about their family's privacy and the protection of their personal identity while on the Internet. Respondents between the ages of 50 and 64 are significantly more likely than other age groups to be concerned about their family's privacy while the Internet. Concern about the protection of one's personal identity is lower among those aged 18 to 29 than older age groups.

	Internet User 2010	Internet User 2014
Concern about my privacy or my family's privacy while on the Internet	**4.59**	4.38
Concern about protection of personal identity while on the Internet	**4.71**	4.49

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Attitudes Toward the Internet Among Internet Non-Users

The table below compares the same attitudinal ratings between Internet Users and Non-Users. As shown, Internet Users have more positive attitudes toward the Internet than Non-Users.

	Internet User	Internet Non-User
INTERNET VALUE*		
Internet is a valuable source for information and learning	**3.75**	3.37
People can be more productive using the Internet	**3.41**	2.96
It is important for children to learn how to use the Internet	**3.57**	3.22
The Internet makes shopping and buying much more convenient	**3.48**	2.56
INTERNET SAFETY*		
The Internet is too dangerous for children	2.74	**3.20**
There is too much pornography and offensive material on the Internet	3.24	**3.54**
It is too easy for my personal information to be stolen online	3.12	**3.56**
INTERNET PRIVACY**		
Concern about my or my family's privacy while on the Internet	**4.38**	3.81
Concern about protection of personal identity while on Internet	**4.49**	4.00

Numbers bolded and shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.
** Mean is based on a four-point scale where "1" means "strongly disagree" and "4" means "strongly agree"*
*** Mean is based on a five-point scale where "1" means "no concern at all" and "5" means "significant concern"*

Internet Non-Users and Broadband Non-Adopters

As stated, 82% of Oregonians use high-speed Internet or broadband at home. The remaining 18% is made up of:

- Users of home dial-up (1%);
- People who use the Internet outside the home only (4%)[17]; and
- People who don't use the Internet at all (13%).

Collectively, they are all part of the "broadband non-adopters." This section of the report examines them in more detail, starting with the Internet non-users, or the 13% who do not use the Internet.

	Internet Non-users 2010	Internet Non-users 2014
Device Ownership		
Have a PC/Laptop/Tablet	35%	**21%**
Have a smartphone	6%	8%
Age		
18 to 29	6%	9%
30 to 49	26%	20%
50 to 64	27%	29%
65+	41%	42%
Income*		
Less than $30K	52%	**68%**
$30K to $49.9K	**28%**	21%
$50K to $74.9K	**11%**	6%
$75K or more	**9%**	4%
Education		
Some High School	15%	**24%**
High School Degree	**48%**	36%
Some College or AA Degree	25%	27%
College Degree or Higher	12%	14%
Employment Status		
Employed	31%	30%
Unemployed/Seeking employment	**8%**	3%
Unemployed/Not seeking employment/Disabled	14%	13%
Homemaker	0%	**6%**
Retired	44%	47%
Race/Ethnicity		
White	**79%**	67%
Hispanic	14%	**25%**
Non-white/Non-Hispanic	7%	8%

*Interpretation advisory: caution should be used when comparing 2014 with 2010 income findings as the distribution is affected by a large percentage of Internet non-users who refused to answer the income question. *Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.*

[17] In this report, Broadband Non-adopters refers to all people, including both users and non-users of the Internet, who do not use broadband at home.

Understanding Internet Non-Users

People who do not use the Internet are sub-labeled "Internet non-users" primarily for ease of comparing with the 2010 group with the same name. Unique to the 2014 report, the Internet non-users will be split further into two groups and analyzed in more detail on the following pages.

Consistent with findings thus far, significantly fewer Internet non-users have a desktop, laptop or tablet PC (35% in 2010 vs. 21% in 2014).

Notably, although smartphone adoption has skyrocketed among the Oregon population to 60%, only 8% of Internet non-users have a smartphone (The 8% is statistically the same as it was in 2010).

The demographic make-up of Internet non-users is different compared with 2010, as the table shows. Specifically, a higher percentage of Internet non-users in 2014 earn less than $30K in household income (68% vs. 52% in 2010), and/or did not graduate high school (24% vs. 15% in 2010).

Regarding shifts from 2010 by racial/ethnic groups, a higher percentage of Internet non-users include Hispanics (14% in 2010 vs. 25% in 2014).

Interestingly, of the Internet non-users, 22% said someone else in the household uses the Internet. Applying this percentage to infer household representation of Internet users, an estimated 90% of Oregon households use the Internet. This is the same percentage of households that used the Internet in 2010. It is also interesting that, of the households where neither the respondent nor his/her spouse use the Internet, 23% say a child under 18 in the household uses the Internet.

Compared to 2010 findings, a greater percentage of Oregonians:

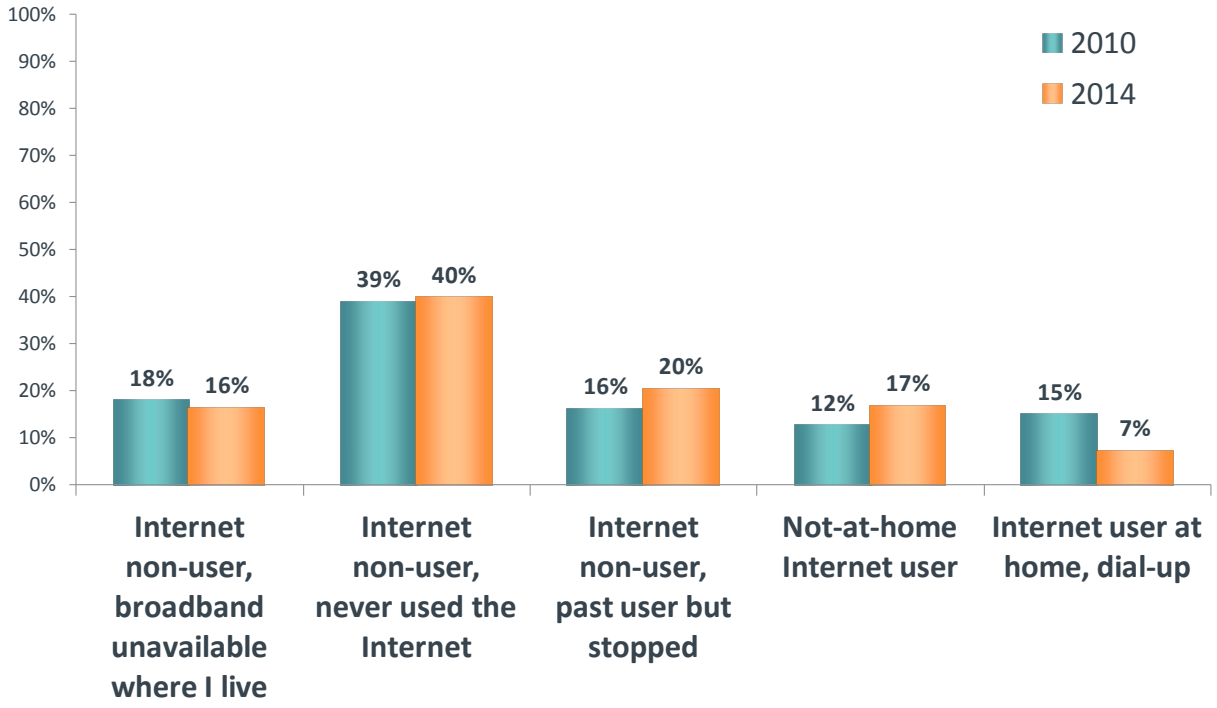
1) Had home Internet access in the past, but no longer do; or
2) Use the Internet currently, but somewhere else besides home.

Broadband Non-Adopters

As stated on the previous page, the broadband non-adopters make up 18% of all Oregonians and include two groups of Internet non-users. A third group of broadband non-adopters—Internet users who do not use broadband at home—accesses the Internet only away from home.

These three groups are broken down in further detail in the chart below and compared with the same groups from the 2010 findings. Among all broadband non-adopters, 40% said they've never used the Internet. This is statistically the same as in 2010. Increases have occurred in the percentage of broadband non-adopters who had home access but stopped (16% to 20% in 2014) and those who use the Internet now but not at home (12% to 17% in 2014).

As described previously, there are significantly fewer dial-up users in Oregon than there were in 2010. They are more common in the NW Coast and Eastern Oregon regions than any of other the regions. These two regions, along with North and South Central, are regions where respondents were most likely to say broadband is not available where they live. Please note dial-up users are excluded from further analysis in this section because the sample size is small. Also excluded are those who can't get broadband because it's unavailable, since they are restricted by something currently out of their control.



Profile of Broadband Non-Adopters

The following three groups are considered home broadband non-adopters because they do not use broadband at home. Their differences and similarities are described in greater detail on the following pages.

- Home broadband non-adopters who have never used the Internet
- Home broadband non-adopters who had Internet access at home in the past but no longer do; and
- Internet users that don't use the Internet at home, thus have no home broadband.

Broadband non-adopters who have never used the Internet tend to be older, as 43% are 65 or older. They typically earn lower income and have less education, as 73% live in a household earning under $30K annually and 27% have less than a high school education. Almost a third (32%) are Hispanic.

Not-at-home Internet users include more people under age 30 (27%). Nearly 6 out of 10 (59%) in this group earn under $30K annually, and just 16% are age 65 or older.

	Broadband Non-Adopters Total	Never Used	Non-User/ Past User	Not-at-Home Internet User
Age				
18 – 29	13%	11%	7%	**27%**
30 – 49	20%	18%	19%	27%
50 – 64	31%	29%	38%	30%
65+	36%	**43%**	36%	16%
Income				
Less than $30K	65%	**73%**	59%	59%
$30K to $49.9K	22%	18%	27%	22%
$50K to $74.9K	9%	4%	10%	15%
$75K or more	4%	5%	4%	3%
Education				
Some High School	21%	**27%**	19%	13%
High School Degree	35%	36%	31%	35%
Some College or AA Degree	29%	25%	32%	35%
College Degree or Higher	15%	12%	19%	17%
Race / Ethnicity				
White	66%	62%	68%	68%
Hispanic	23%	**32%**	16%	13%
Non-white/Non-Hispanic	11%	5%	15%	19%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Device Ownership Among Broadband Non-Adopters

Those who have never used the Internet are least likely to own a device.

Not-at-home Internet users are just as likely to own a desktop PC but significantly more likely to own other devices compared to Internet non-users.

Device Owned	No Broadband at Home Total	Never Used	Non-User/ Past User	Not-at-Home Internet User
Desktop PC	14%	14%	13%	14%
Laptop PC	13%	8%	**19%**	**18%**
Tablet	8%	6%	5%	**15%**
Game Console	8%	5%	9%	**16%**
Smartphone	14%	7%	9%	**37%**
Basic Cell Phone	59%	61%	62%	53%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

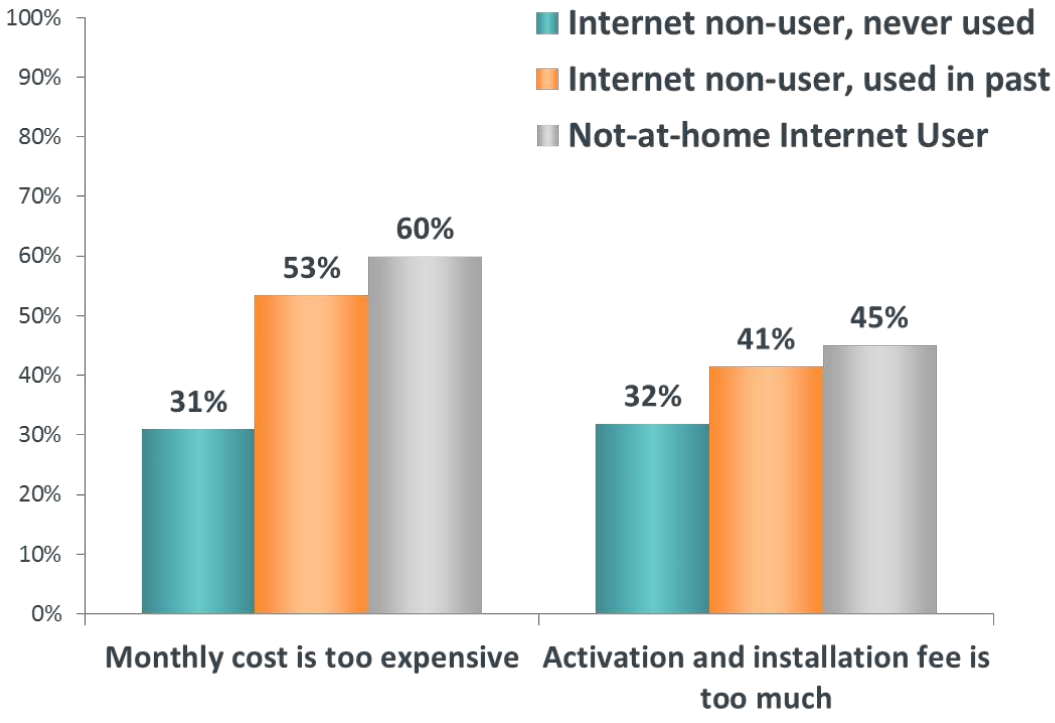
Reasons for Not Using the Internet at Home

Respondents were asked to rate each of ten reasons why they may not be using the Internet at home. Ratings are based on a 1 to 5 scale where 1 means "Not at all a reason" and 5 means "A major reason for not using the Internet." The chart below displays the top box ratings (a 4 or 5 rating) given by respondents who said they do not have Internet access at home. This excludes dial-up users and people who said it's not available where they live.

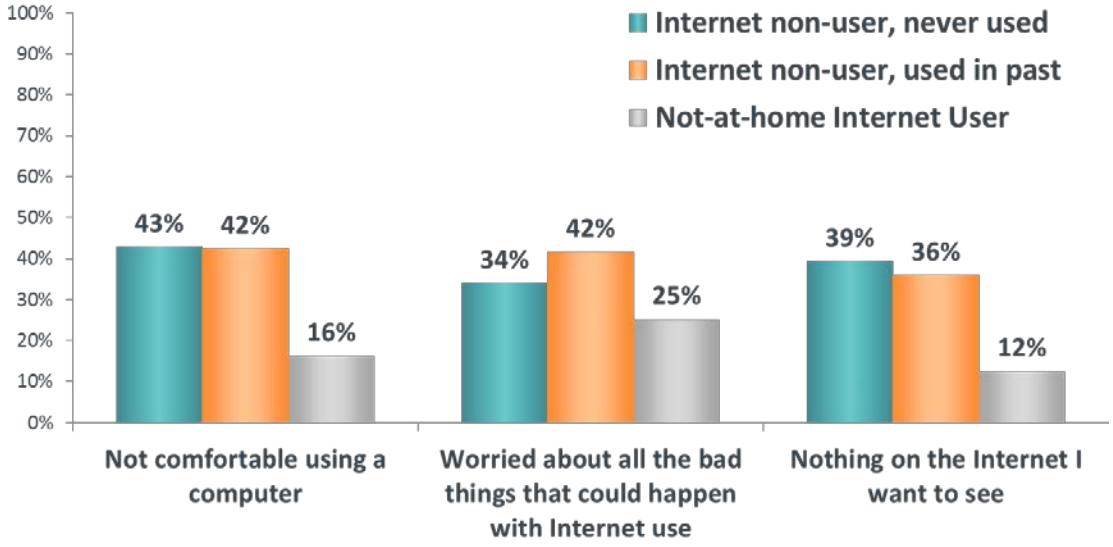
Cost-related reasons are the highest-rated overall, especially among not-at-home Internet users, 60% of whom rated monthly cost a 4 or 5. The percentage who rated the cost-related reasons a 4 or 5 is similar to the percentage in 2010.

Among Internet users who don't have broadband at home, the overriding reason why is cost. Among people who have never used the Internet, however, lack of need and/or perceived discomfort with the Internet or computers are more common reasons than cost.

Among those who have never used the Internet, cost-related reasons are not as common as are reasons pertaining to discomfort and perceived need, which are presented on the next page.



Among those who have never used the Internet, top reasons are related to discomfort and perceived need: "I am not comfortable using a computer" (43%), "There is nothing on the internet I want to see" (39%), and "I am worried about all the bad things that could happen" (34%). Among all respondents who don't use the Internet at home, significant increases have occurred with all reasons related to discomfort and perceived need. This supports other findings that Internet use is near saturation levels in the state overall.



Internet users who don't use the Internet at home access the Internet at two other locations, on average, whether at someone else's house (50%), or connecting at the public library (49%), or at work (35%). A significant increase over 2010 was observed for the reason, "I have all the access I need through my cell phone or wireless device," which is likely due to the rise in tablet and smartphone use.

Reasons for Not Using the Internet at Home (4-5 on a 5-pt scale)	**Not-at-Home Internet User 2014**	**Change from 2010**
ACCESS TO SERVICE		
Can access the internet all I want at a public location	45%	+5%
Can access the Internet all I want at a friend or family member's home	36%	*n/a*
Have all the access I need through my cell phone or wireless device *[of those who have a wireless device]*	30%	**+10%**
Can access the Internet all I want at work *[of those who are employed]*	31%	-8%

Numbers shaded in yellow indicate the percentage is higher than it was in 2010.

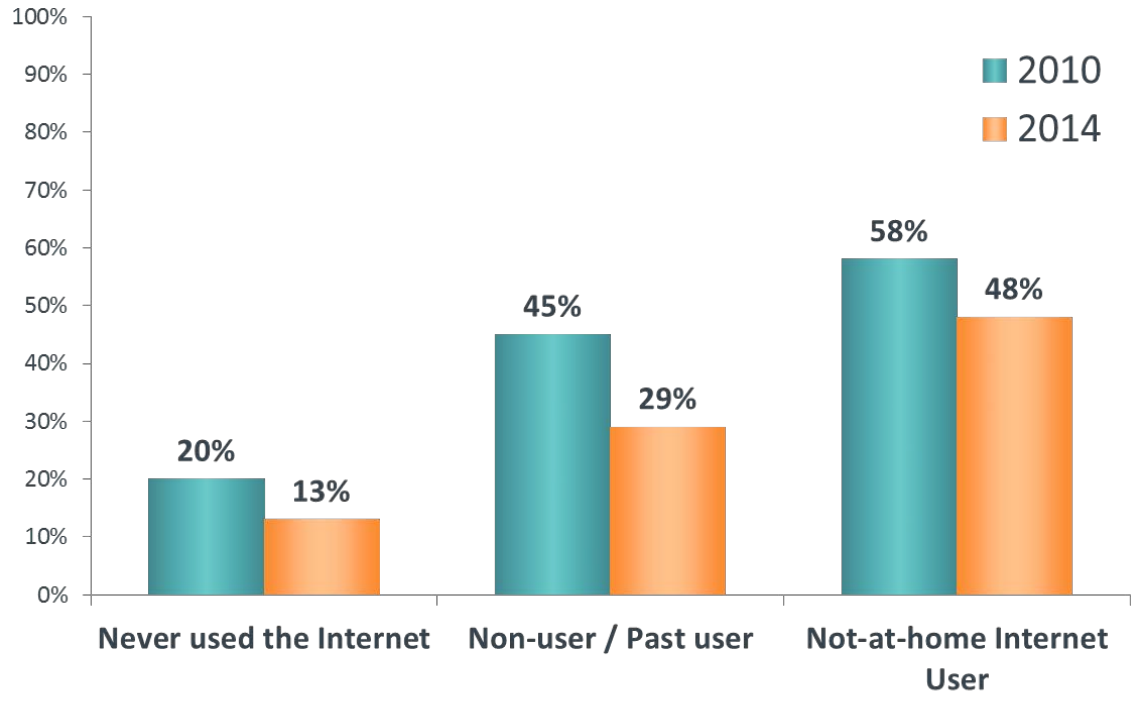
Interest in Using the Internet in the Future

Those who have never used the Internet were asked whether they'd be interested (very or somewhat) or uninterested (very or somewhat) in starting to use it. The percentage of those who are either somewhat or very interested has decreased significantly from 20% to 13%.

As shown below, an even wider gap exists between survey periods with regard to the percentage of broadband non-adopters who are past users, as 45% were interested in 2010, compared to 29% this year. Evidence of waning interest among non-adopters to begin using broadband at home is an indication that the market is nearing saturation. In other words, for example, the majority of Oregonians who say they've never used the Internet just might never use it. In fact, nearly half of all broadband non-adopters who do not use the Internet - which equates to 6% of all Oregonians - say they've never used the Internet and they have no interest in starting to use the Internet.

Fewer non-users in 2014 than in 2010 are interested in using the Internet. Among all current non-users of broadband at home, 22% are either somewhat or very interested in using the Internet at home, compared to 29% in 2010.

Among those who said broadband isn't available where they live (3% of all survey respondents), half said they would be somewhat or very likely to use it, if it were available. Younger respondents are more likely than older Oregonians to express interest in broadband access if it were available.

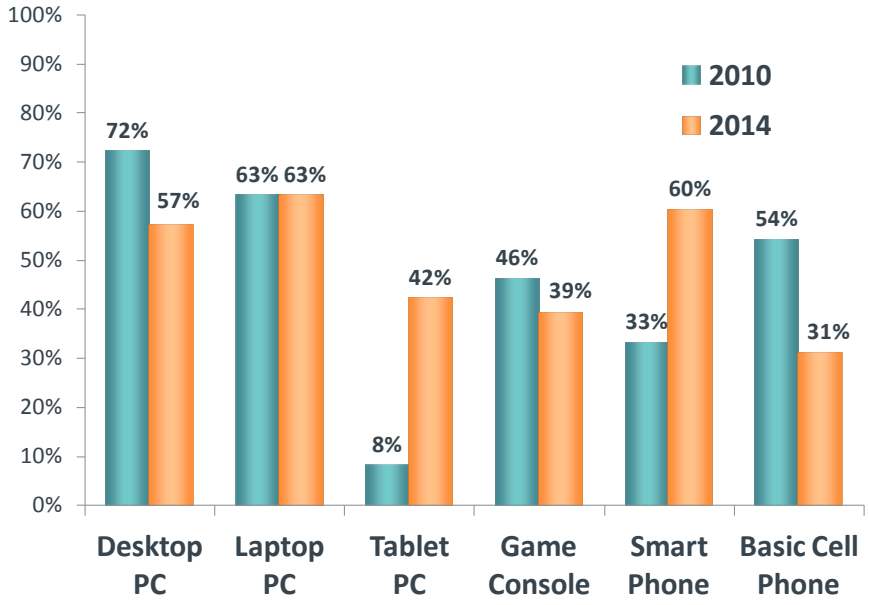


Device Ownership

Results of the 2014 survey reveal major trend shifts in device ownership since 2010. Tablet PCs and smartphones have replaced a significant portion of desktop PCs and basic cell phones.[18] As a result, computer ownership is transforming into "device" ownership. Device ownership naturally correlates with Internet use. Among all Oregonians, 97% have at least one of the following: desktop PC, laptop PC, tablet PC, game console, smartphone or basic cell phone.

As shown in the chart at right, the percentage of desktop PC owners has decreased significantly since 2010, from 72% to 57%. On the other hand, quite a significant increase has occurred in the ownership of tablet PCs (8% to 42%) and smartphones (33% to 60%), which are rapidly replacing basic cell phones (down significantly from 54% to 31%).

As indicated in the table below, the 2014 breakdown of device ownership in Oregon, including the growth of tablet and smartphone use, is similar to that of the U.S. population overall.[19] [20]



National Breakdown of Device Ownership	U.S. 2010	U.S. 2014
Desktop PC	59%	57%
Laptop PC	52%	64%
Tablet PC	4%	42%
Game Console	42%	41%
Smartphone	35%	58%
Basic Cell Phone	50%	32%

More people are using a smartphone and no other device, as 5% have only a smartphone compared to 1% in 2010.

[18] For the purposes of this report, a basic cell phone is defined as a cellular phone that has been identified by the respondent as a cellular phone that is not a "smartphone, such as an iPhone or Android phone."
[19] http://www.pewinternet.org/data-trend/mobile/device-ownership/
[20] http://www.gallup.com/poll/166745/americans-tech-tastes-change-times.aspx

Device Ownership by Age Group

Age correlates strongly with device ownership. Oregonians under age 50 are significantly more likely than those aged 50 and older to own a smartphone, laptop or a game console. Those aged 65 and older are significantly more likely to own a basic cell phone.

Devices Owned	Total	18-29	30-49	50-64	65+
Desktop PC	57%	51%	57%	62%	58%
Laptop PC	63%	**69%**	**71%**	63%	48%
Tablet PC	42%	42%	**53%**	41%	26%
Game Console	39%	**64%**	**52%**	27%	8%
Smartphone	60%	**81%**	**71%**	52%	29%
Basic Cell Phone	31%	16%	22%	37%	**55%**

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Being digitally connected has become the norm for the younger generation. Based on a report published in July, 2014 by Experian Marketing Services, Millennials (aged 18-34) are the most digitally connected generation. Three-quarters (77%) of adult Millennials nationwide own a smartphone and the average owner spends 14.5 hours a week using it. They spend so much time on their smartphones that they account for 41% of the total time Americans spend using smartphones, despite making up just 29% of the U.S. population.[21]

Device Ownership by Region

Oregonians who reside in the NW Coast and Portland regions are more likely than those in the Eastern region to own a smartphone. Oregonians who reside in the Portland region are more likely than other regions to own mobile devices such as laptops, tablets, and smartphones. Central Oregon residents are significantly more likely to own a laptop than those in South Central, North Central, and SW Oregon. South Central and Eastern are more likely than other regions, especially Portland, to have a basic cell phone.

Devices Owned	Total	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern
Desktop PC	57%	54%	59%	57%	55%	54%	54%	55%	52%
Laptop PC	63%	61%	**66%**	63%	58%	56%	**69%**	54%	60%
Tablet PC	42%	40%	**48%**	38%	34%	40%	42%	32%	38%
Game Console	39%	37%	**41%**	37%	35%	40%	35%	37%	35%
Smartphone	60%	51%	**69%**	56%	49%	50%	55%	45%	42%
Basic Cell Phone	31%	36%	25%	35%	38%	36%	34%	40%	**42%**

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

[21] http://www.experian.com/marketing-services/millennials-report.html

Device Ownership by Household Income

Device ownership is strongly correlated with annual household income. Oregonians with an annual household income under $30K are significantly less likely than those in higher earning brackets to own a desktop, laptop, tablet, game console, or smartphone. About three-quarters of those with household income greater than $75K own both a laptop and a smartphone. Tablet PC ownership in particular is also strongly correlated with household income. Just 26% of those earning under $30K own a tablet PC, compared to 68% of those earning over $75K.

Nationwide usage, as of January 2014, shows 58% of American adults owning a smartphone, which is just under Oregon's statewide total of 60%. Nationally, tablet ownership is at 42%, exactly the same as in Oregon.[22]

Device at home	Total	< $30K	$30K - $49.9K	$50K - $74.9K	> $75K
Desktop PC	57%	45%	55%	**67%**	**71%**
Laptop PC	63%	47%	65%	71%	**86%**
Tablet PC	42%	26%	37%	**51%**	**68%**
Game Console	39%	34%	41%	43%	48%
Smartphone	60%	47%	60%	66%	**82%**
Basic Cell Phone	31%	**40%**	32%	29%	15%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Device Ownership by Race/Ethnicity

Hispanic Oregonians are significantly less likely than other racial/ethnic groups to own a desktop, laptop or tablet PC, while they are just as likely as white adults to own a game console, smartphone or basic cell phone. Nationally, just 53% of white adults own a smartphone compared to 61% of Hispanic adults.[23] Note that only 56% of Hispanic respondents have an e-mail account compared to 87% of white respondents and 85% of non-white/non-Hispanic respondents.[24]

Non-white/non-Hispanic Oregonians are more likely than Hispanics to own any device while white Oregonians are significantly more likely than non-white/non-Hispanics to own a basic cell phone. Note that the higher percentages of the non-white/non-Hispanics owning devices are attributed specifically to the mixed race and Asian demographics.

Device at home	Total	White	Hispanic	Non-white/Non-Hispanic
Desktop PC	57%	61%	34%	**55%**
Laptop PC	63%	66%	40%	**70%**
Tablet PC	42%	42%	36%	**48%**
Game Console	39%	38%	40%	**48%**
Smartphone	60%	59%	61%	**69%**
Basic Cell Phone	31%	33%	29%	23%

Numbers bolded and shaded in yellow are significantly higher and numbers shaded in orange are significantly lower.

[22] http://www.pewinternet.org/data-trend/mobile/device-ownership/

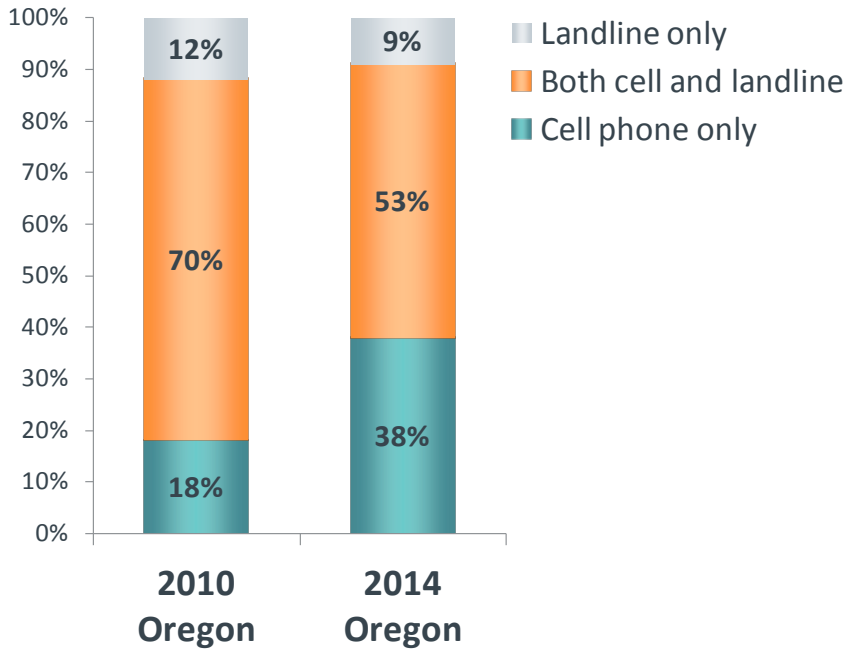
[23] http://www.pewinternet.org/2014/02/27/part-1-how-the-internet-has-woven-itself-into-american-life/

[24] For the purposes of this report, the non-white/non-Hispanic label combines respondents who identify their race category as either African American, American Indian or Alaska Native, Asian or Pacific Islander, or of mixed race origins.

Cell Phone vs. Landline Phone Use

As cell phone/smartphone adoption has reached 91% statewide, an increasing number of Oregonians are dropping landline phone service in favor of cellular phone service. Between 2010 and 2014, the percentage of those with landline phones decreased from 82% to 62%, while cell-phone-only households rose from 18% to 38%. These findings are consistent with national figures that show cell-phone-only households have increased from 25% to 39% between 2010 and 2013. Over that same period, U.S. landline use has decreased from 75% to 61%.[25]

This trend away from landline use is strongly correlated with age and income. In Oregon, 70% of adults between the ages of 18 and 29 live in a cell-phone-only household. In contrast, just 16% of Oregonians over the age of 65 have completely stopped subscribing to a landline service. Over half of all Oregonians with annual household incomes under $30K live in cell-phone-only households compared to 27% of those earning over $75K annually. Also of note: 63% of Hispanic adults in Oregon live in a cell-phone-only household, compared to 50% nationally.[26]



The prevalence of cellular-exclusive households is most pronounced in the Portland metro area (44%) and the Central Coast region (38%). In the NW Coast, South Central, and Eastern Oregon, cell-phone-only households are less prevalent, at 23%, 24%, and 22% respectively.

Phone Type	Total	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern
Cell-Phone-Only	38%	23%	**44%**	**38%**	32%	29%	33%	24%	22%
Both Landline and Cell Phone	53%	**64%**	50%	53%	55%	58%	55%	61%	62%
Landline Only	9%	13%	6%	9%	13%	13%	12%	**15%**	**16%**

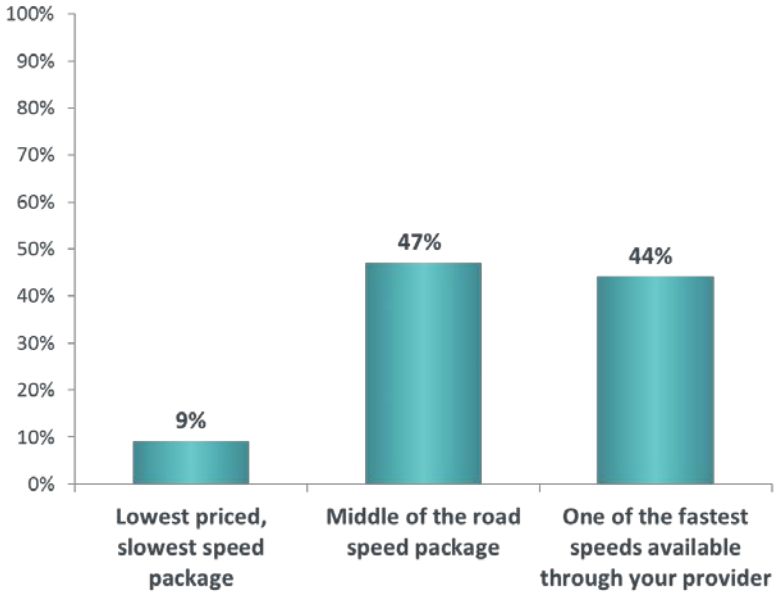
Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

[25] http://www.cdc.gov/nchs/data/nhis/earlyrelease/wireless201312.pdf
[26] http://www.cdc.gov/nchs/data/nhis/earlyrelease/wireless201312.pdf

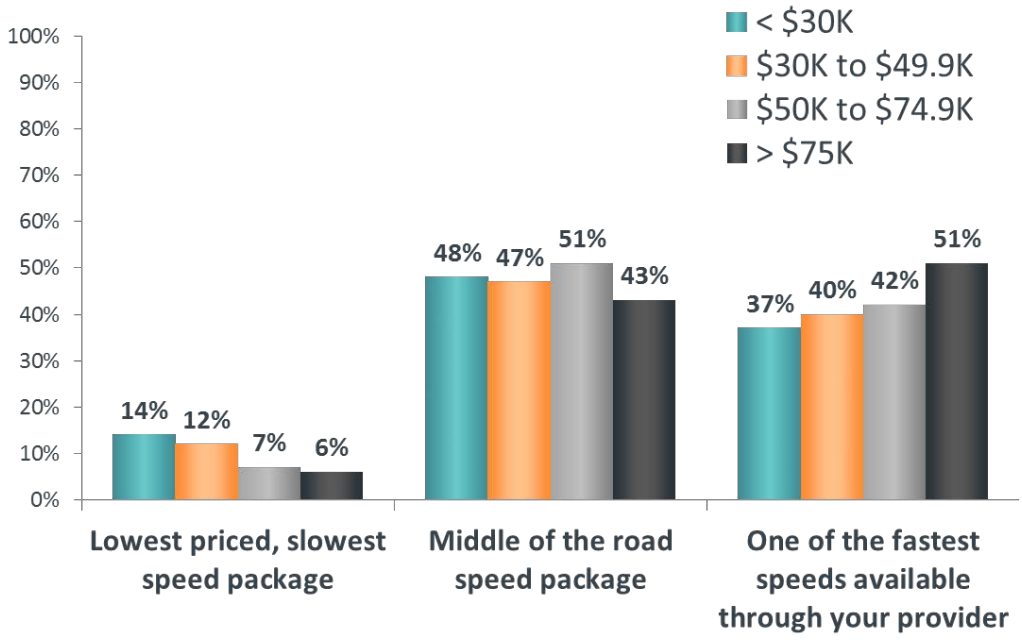
Current Monthly Cost and Perceived Costs

When asked to describe their current Internet speed at home, just 9% of Oregonians stated that they subscribed to the "lowest priced, slowest speed package."

Across regions, Eastern Oregon is more likely than most regions to subscribe to the "lowest priced / slowest speed" package (14%). The NW Coast and SW Oregon are more likely than most regions to indicate they subscribe to the "fastest" with 50% of respondents in each region indicating this tier of service.



Predictably, household income is correlated to an extent with the tier of service to which Oregonians subscribe. Interestingly, even users in the lowest income bracket have (or perceive that they have) a fast Internet speed, with 37% of those earning under $30K indicating they subscribe to "one of the fastest speeds available."



Cost of Current Broadband Service vs. What's Reasonable by Region

Respondents with broadband service at home were asked how much they spend monthly on their service. Across the state, $53.31 was the average price indicated. Residents of both Portland and the Central Coast indicated their monthly service cost was on average $55, which is higher than most regions. Residents of Eastern Oregon and North Central, with expenses averaging near $47 each, are paying the least amount across the state. Please note that, because of the popularity of bundled services, it's difficult for many respondents to estimate the broadband Internet portion of their monthly bill.

As a follow-up question, home broadband users were also asked what would be a reasonable monthly cost for high speed Internet service. Statewide, the average reasonable monthly cost indicated was $36.13, which is about two-thirds the average monthly amount specified. Across all eight regions, the range of what is considered a reasonable cost spans just $4, with Portland / Central Coast indicating the highest amount ($37) and Eastern Oregon indicating the lowest ($33).

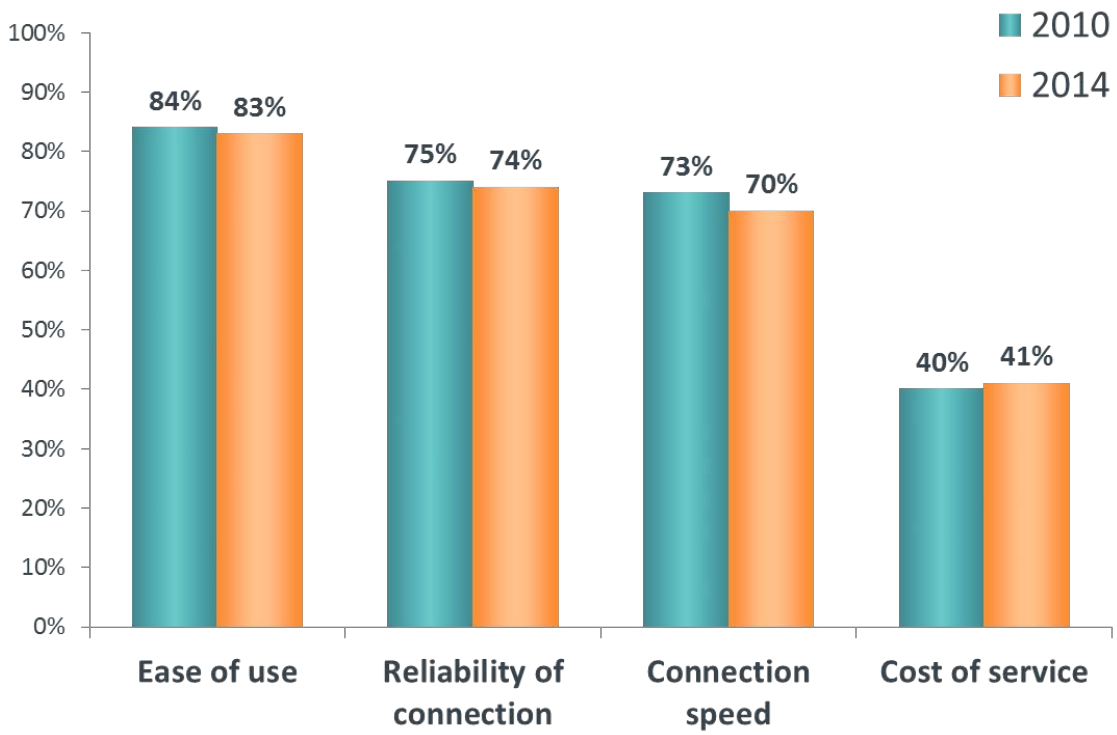
	Total	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern
Currently Monthly Cost	$53	$53	**$55**	**$55**	$48	$47	$53	$49	$47
Reasonable Monthly Cost	$36	$35	$37	$37	$34	$35	$36	$34	$33
Difference	$17	$18	$18	$18	$14	$12	$17	$15	$14

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Satisfaction with Internet Services

Overall, Oregonians are generally satisfied with their Internet service. When asked to rate overall satisfaction with their service provider using a five-point scale, 75% of home broadband users rated them either a 4 or 5. There was little variance in satisfaction ratings by income, educational attainment, or by racial/ethnic group, although older respondents (65+) and female respondents were generally more satisfied.

Respondents were also asked to rate their satisfaction with specific attributes related to their Internet service using the same five-point scale, with 1 meaning "not at all satisfied" and 5 meaning "very satisfied." Here, Oregonians were most satisfied with ease of use, then reliability of the connection and followed by connection speed of their services. Satisfaction with cost of service remains comparatively low. Notably, compared to the 2010 findings, significantly fewer respondents rated connection speed a 4 or 5.



Pivot has experience conducting studies regarding satisfaction with these attributes including Internet speed. Based on the findings that Pivot has observed, a drop in satisfaction can be caused by an increase in the number of devices being used in the home. For example, whereas a broadband user may have been satisfied with their speed in the past, the perceived speed of the same connection will go down as more users are on the Internet performing bandwidth-intensive activities such as streaming music or video, or using an Internet connected Xbox. Many Internet providers are facing the challenge of keeping up with bandwidth demand.

The following table shows the mean satisfaction ratings of each of the four satisfaction attributes, by region, and the difference from 2010. These ratings are based on a 1 to 5 scale where 1 means "Not at all satisfied" and 5 means "Very satisfied."

Residents with broadband access in Portland Metro and the Central Coast regions are significantly less satisfied with their connection speeds compared to four years ago. Portlanders are also significantly less satisfied with their connection reliability in 2014 compared to 2010. South Central Oregon was the only region that saw any improvement in satisfaction ratings across the board. In 2010, this region had among the lowest satisfaction levels in the state. Overall satisfaction across the state does not vary much by region, although South Central Oregon is trending higher and Eastern Oregon is trending lower.

Satisfaction Ratings with Internet	Total	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Overall Satisfaction	3.97	3.94	3.96	3.96	3.96	3.98	3.99	4.09	3.91
Your connection speed	3.96	3.92	3.97	3.93	4.00	3.92	4.00	4.14	3.78
Difference from 2010	-0.11	-0.08	-0.15	-0.12	0.02	-0.09	-0.18	0.29	0.12
Cost of Service	3.20	3.05	3.19	3.10	3.39	3.35	3.32	3.38	3.33
Difference from 2010	-0.06	-0.24	-0.02	-0.10	-0.05	-0.13	-0.11	0.01	-0.06
Ease of use	4.29	4.30	4.32	4.27	4.26	4.24	4.25	4.39	4.25
Difference from 2010	-0.04	-0.09	-0.06	0.02	-0.08	-0.21	-0.08	0.19	0.08
The reliability of your connection	4.02	3.92	4.03	4.03	4.02	3.91	3.98	4.10	3.81
Difference from 2010	-0.04	-0.08	-0.09	0.04	0.01	-0.11	-0.13	0.07	-0.10

Significant decreases from 2010 are highlighted in orange.

Summary of Key 2014 Statistics

Below is a summary of key statistics drawn from the 2014 Oregon Broadband Adoption Survey.

Summary of Key 2014 Statistics
Internet / Broadband Use
87% of Oregonians use the Internet.
83% of Oregonians access the Internet at home.
97% of those who have either a desktop PC, laptop PC, or tablet PC use the Internet.
97% of those earning $75K or more annually use home broadband.
93% of college graduates use home broadband.
42% of Internet users access the Internet at a cafe or other type of business.
51% of all home Internet users say they use cable as their primary connection type.
82% of Oregonians use broadband / high-speed Internet at home.
Device Ownership
84% of Oregonians have a desktop, laptop or tablet PC at home.
42% of Oregonians have a tablet PC at home.
91% of Oregonians have either a basic cell phone or smartphone.
60% of Oregonians have a smartphone.
31% of Oregonians have a basic / traditional cell phone.
5% of Oregonians have a smartphone only and not a desktop, laptop or tablet PC.
38% of Oregonians have a cell phone or smartphone but no landline at home.

Appendices

Appendix A. Key Findings by Region

Computer Ownership	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Yes	88%	82%	81%	**85%**	82%	79%	77%	**86%**	74%	77%
No	12%	18%	19%	15%	18%	21%	23%	14%	**26%**	23%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Respondents (n = 4,015)

Device Ownership	2010 OBAS	State -wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
No computer at home	12%	18%	19%	15%	18%	21%	23%	14%	**26%**	23%
Desktop PC only	25%	18%	19%	17%	18%	20%	19%	16%	19%	15%
Laptop PC only	15%	24%	26%	23%	24%	24%	21%	**32%**	17%	23%
Tablet PC only	0%	1%	1%	**2%**	1%	< 1%	2%	1%	2%	2%
Desktop and Laptop PC	48%	39%	34%	**42%**	39%	35%	35%	37%	36%	37%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Respondents (n = 4,015)

Use Internet at Home	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
% Use Internet at Home	85%	84%	80%	**86%**	84%	81%	77%	**85%**	70%	71%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Respondents (n = 3,360)

Appendix A. Key Findings by Region (continued)

Use Internet At Home	County	% Use Internet at Home	2010 OBAS % Use Internet at Home
NW Coast	Clatsop	82%	75%
	Columbia	83%	80%
	Lincoln	78%	79%
	Tillamook	77%	82%
Portland	Clackamas	88%	83%
	Multnomah	84%	88%
	Washington	89%	89%
	Yamhill	84%	89%
Central Coast	Benton	83%	99%
	Linn	85%	90%
	Lane	89%	88%
	Marion	78%	78%
	Polk	87%	93%
SW Oregon	Coos	84%	86%
	Curry*	96%	71%
	Douglas	74%	81%
	Jackson	82%	84%
	Josephine	80%	74%
North Central	Gilliam*	69%	-
	Hood River	89%	77%
	Morrow*	73%	58%
	Sherman*	48%	-
	Umatilla	77%	76%
	Wasco	71%	81%
	Wheeler*	100%	-
Central Oregon	Crook	77%	89%
	Deschutes	89%	90%
	Jefferson*	67%	83%
South Central	Grant*	77%	75%
	Harney*	79%	71%
	Klamath	69%	78%
	Lake*	65%	67%
Eastern Oregon	Baker	74%	80%
	Malheur	66%	72%
	Union	72%	78%
	Wallowa*	78%	60%

** Note: Cell sizes are small (n = < 20). Care should be taken in using these results.*

Appendix A. Key Findings by Region (continued)

Access Locations	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Average # of Access Points	3.0	3.0	2.8	3.2	2.9	2.6	2.8	2.9	2.5	2.5
Home	97%	96%	93%	96%	97%	96%	96%	95%	92%	95%
School*	93%	84%	**100%**	89%	80%	82%	76%	73%	89%	**100%**
Work**	77%	73%	66%	**76%**	72%	65%	66%	73%	72%	64%
Someone Else's House	50%	50%	43%	**56%**	49%	41%	44%	45%	37%	40%
Café or Other Business	31%	42%	34%	**49%**	37%	31%	39%	39%	25%	21%
Public Library	32%	29%	26%	32%	28%	23%	27%	29%	23%	26%
Community Center	6%	8%	11%	9%	8%	6%	11%	9%	6%	5%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Users (n = 3,497)

** Base is limited to those who are students*

*** Base is limited to the employed*

Last Time Used the Internet	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Today	79%	83%	77%	**84%**	83%	79%	81%	81%	80%	83%
In the past week but not today	18%	14%	15%	13%	15%	18%	17%	16%	17%	14%
In the past month but not this week	2%	2%	**5%**	1%	2%	1%	1%	3%	2%	2%
Longer than one month ago	1%	1%	3%	2%	1%	2%	1%	-	1%	1%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Users (n = 3,429)

Frequency of Internet Use	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Daily	75%	80%	79%	**83%**	78%	78%	74%	76%	76%	72%
5 – 6 days a week	11%	8%	8%	7%	9%	7%	10%	10%	10%	11%
3 – 4 days a week	7%	6%	5%	5%	7%	8%	8%	6%	6%	**12%**
1 – 2 days a week	4%	4%	4%	3%	3%	5%	7%	4%	**7%**	3%
2 – 3 days a month or less	4%	2%	4%	2%	3%	2%	1%	4%	1%	3%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Users (n = 3,376)

Appendix A. Key Findings by Region (continued)

Frequency of Using Cell Phone to Access Internet or Check Email	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Access Internet										
Daily	62%	72%	68%	75%	71%	69%	72%	68%	66%	69%
Sometimes	28%	20%	22%	19%	20%	22%	22%	24%	26%	23%
Never	10%	8%	11%	6%	9%	9%	6%	8%	8%	8%
Check Email										
Daily	58%	66%	54%	**70%**	66%	60%	57%	60%	59%	55%
Sometimes	22%	18%	26%	17%	18%	21%	27%	21%	18%	24%
Never	20%	15%	20%	13%	16%	19%	16%	19%	23%	21%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.
Base Sample Size: Weighted Total Answering Among All Respondents who use their smart phone to access the Internet (n =2207)

Appendix A. Key Findings by Region (continued)

Activity Using Broadband at Home	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Check email	91%	93%	91%	90%	93%	91%	93%	92%	93%
Research prices	74%	76%	74%	76%	71%	74%	76%	73%	72%
Online banking	70%	68%	72%	68%	70%	60%	71%	66%	69%
Social networking	69%	65%	71%	68%	70%	68%	65%	65%	69%
Read or watch news	69%	65%	**72%**	65%	66%	64%	69%	62%	68%
Find local businesses or events	69%	67%	71%	69%	66%	56%	66%	54%	55%
Entertainment such as TV, videos or gaming	65%	65%	**68%**	65%	62%	63%	59%	61%	57%
Download or stream music	57%	53%	**61%**	53%	53%	51%	55%	51%	51%
Get public safety info such as road conditions, closures, etc.	57%	60%	59%	55%	48%	63%	60%	59%	61%
Buy or sell goods / services	53%	56%	57%	47%	54%	52%	54%	54%	45%
Obtain information from government website	52%	56%	54%	50%	47%	51%	53%	46%	49%
Get healthcare or medical information	49%	50%	**52%**	46%	46%	38%	45%	43%	39%
Activities relating to my current job	45%	39%	**53%**	41%	34%	40%	41%	39%	38%
Read sports news or scores	43%	40%	**47%**	41%	36%	40%	41%	34%	33%
Educational or training purposes	40%	36%	**43%**	37%	36%	38%	**44%**	36%	36%
Get information on schools	30%	24%	**34%**	27%	26%	32%	27%	25%	26%
Read stock market and related financial news	29%	26%	**33%**	26%	23%	27%	27%	20%	24%
Information on the environment and/or monitor energy use in home	24%	22%	25%	25%	19%	21%	24%	17%	19%
Look for a job	22%	15%	23%	22%	21%	22%	26%	21%	17%
Control heating, cooling, or other energy systems in home	4%	5%	5%	3%	4%	4%	3%	5%	3%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Adopters (n = 3,170)

Appendix A. Key Findings by Region (continued)

Future Interest Among Non-Users	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
% Interest*	31%	15%	19%	8%	17%	18%	20%	**36%**	17%	18%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Non-Users (n = 398)

** Interest = combined "very" and "somewhat" interested*

Reasons for Not Using the Internet	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Cost										
Monthly cost is too expensive	2.88	2.79	2.32	2.98	2.61	2.71	3.10	3.07	2.65	2.37
Activation and install fee is too much	3.01	2.69	2.33	2.78	2.86	2.24	**3.15**	2.93	2.56	2.11
Comfort / Need										
Not comfortable using a computer	2.78	3.00	3.00	3.03	3.17	2.88	2.97	2.50	2.64	2.93
Worried about all the bad things that could happen if I use the Internet	2.80	2.76	2.10	2.84	2.85	2.67	**3.15**	2.62	2.55	2.35
Nothing I want to see on the Internet	2.65	2.82	2.61	2.85	3.00	2.55	3.08	2.40	2.90	2.58
Access to Service										
Can access the Internet all I want at a public location	2.31	2.09	2.34	2.19	2.04	1.88	**2.42**	1.73	1.92	2.12
Can access the Internet all I want at a friend or family member's home	n/a	2.10	2.24	2.16	2.28	1.73	2.29	1.77	1.91	1.93
Have all the access I need through my cell phone or wireless device*	2.04	2.14	2.08	1.96	2.41	2.13	2.23	1.65	2.31	2.03
Can access the Internet all I want at work**	2.03	1.68	1.11	1.73	1.77	1.33	1.60	1.63	2.06	2.24
It is not available where I live	1.68	1.72	1.62	1.91	1.71	1.31	2.00	1.56	1.82	1.71

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Mean is based on a 5-point scale where "1" means "not a reason at all and "5" means "a major reason"
Base Sample Size: Weighted Total Answering Among All Internet Non-Users (n = 498)
** Base is limited to those who have a wireless device*
*** Base is limited to those who are employed*

Appendix A. Key Findings by Region (continued)

Attitudes toward the Internet – Internet Users	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Internet Value*										
Internet is a valuable source for information and learning	3.44	3.75	3.78	3.76	3.73	3.75	3.70	3.75	3.74	3.66
People can be more productive using the Internet	3.85	3.41	3.41	**3.45**	3.36	3.42	3.29	3.39	3.34	3.23
It is important for children to learn how to use the Internet	3.59	3.57	3.56	3.59	3.57	3.56	3.51	3.56	3.50	3.49
The Internet makes shopping and buying much more convenient	n/a	3.48	3.52	**3.52**	3.44	3.44	3.48	3.40	3.40	3.37
Internet Safety*										
The Internet is too dangerous for children	2.61	2.74	2.80	2.74	2.68	2.80	2.85	2.74	**2.91**	2.84
There is too much pornography and offensive material on the Internet	3.37	3.24	3.40	3.16	3.24	3.37	3.39	3.27	**3.45**	3.41
It is too easy for my personal information to be stolen online	3.06	3.12	3.24	3.08	3.08	3.23	3.19	3.14	3.24	3.19
Internet Privacy**										
Concern about my privacy or my family's privacy while on the Internet	4.59	4.38	4.39	4.37	4.31	4.49	4.41	4.40	4.39	**4.56**
Concern about protection of personal identity while on the Internet	4.71	4.49	4.50	4.49	4.42	4.53	4.61	4.59	4.52	4.59

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Users (n = 3,502)

** Mean is based on a 4-point scale where "1" means "strongly disagree" and "4" means "strongly agree"*

*** Mean is based on a 5-point scale where "1" means "no concern at all" and "5" means "significant concern"*

Appendix A. Key Findings by Region (continued)

Attitudes toward the Internet – Internet Non-Users	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Internet Value*										
Internet is a valuable source for information and learning	3.48	3.37	3.29	3.20	**3.56**	**3.53**	3.33	3.40	3.18	3.40
People can be more productive using the Internet	2.96	2.96	2.80	2.96	3.03	2.81	3.11	2.97	2.81	3.14
It is important for children to learn how to use the Internet	3.21	3.22	3.50	3.25	3.21	2.96	3.24	3.40	3.19	3.41
The Internet makes shopping and buying much more convenient	n/a	2.56	**3.01**	2.42	2.60	2.57	2.52	2.53	2.68	**3.00**
Internet Safety*										
The Internet is too dangerous for children	3.28	3.20	3.12	3.13	3.21	3.30	**3.51**	2.78	**3.52**	3.19
There is too much pornography and offensive material on the Internet	3.79	3.54	3.29	3.46	3.67	3.58	3.53	3.56	3.60	3.43
It is too easy for my personal information to be stolen online	3.61	3.56	3.16	3.64	3.66	3.32	3.62	3.56	3.45	3.43
Internet Privacy**										
Concern about protection of personal identity while on the Internet	4.42	4.00	3.44	4.25	3.87	3.52	4.36	4.19	4.20	4.11
Concern about my privacy or my family's privacy while on the Internet	4.20	3.81	3.02	4.08	3.68	3.42	4.12	3.92	3.96	3.72

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Non-Users (n = 487)

** Mean is based on a 4-point scale where "1" means "strongly disagree" and "4" means "strongly agree"*

*** Mean is based on a 5-point scale where "1" means "no concern at all" and "5" means "significant concern"*

Appendix A. Key Findings by Region (continued)

Overall Results	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Home Broadband	82%	82%	78%	**85%**	**83%**	79%	76%	**83%**	69%	67%
Dial-up	3%	1%	3%	1%	1%	2%	1%	2%	1%	4%
Internet User Other than Home	3%	4%	6%	4%	2%	4%	3%	5%	6%	4%
Non-user	12%	13%	14%	10%	13%	15%	**20%**	10%	**24%**	**25%**

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Respondents (n = 4,017)

Type of Service	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Cable Modem	42%	51%	43%	**56%**	49%	**53%**	36%	42%	51%	18%
DSL	34%	25%	36%	20%	28%	24%	37%	38%	32%	**56%**
Mobile / Cellular	21%	10%	9%	10%	13%	9%	**17%**	5%	7%	5%
Fiber		7%	5%	**10%**	5%	4%	2%	2%	3%	5%
Satellite		3%	3%	1%	2%	6%	4%	6%	5%	**9%**
Fixed Wireless		2%	-	2%	2%	1%	2%	3%	< 1%	-
Other High Speed		1%	1%	1%	2%	1%	3%	2%	1%	**7%**
Dial-Up	3%	2%	4%	1%	2%	2%	2%	3%	2%	**6%**

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Have Internet Access at Home (n = 3,122)

Appendix A. Key Findings by Region (continued)

Reported Monthly Cost for Home Internet Service	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
< $20 / Mo	6%	6%	5%	7%	5%	3%	4%	5%	5%	8%
$21 - $40 / Mo	44%	33%	34%	28%	31%	**46%**	44%	38%	41%	**45%**
$41 - $60 / Mo	36%	33%	35%	33%	32%	31%	39%	36%	36%	31%
> $60 / Mo	15%	28%	26%	**32%**	**31%**	20%	13%	22%	18%	16%
Median	$44.07	$53.31	$53.39	$54.77	$55.06	$47.57	$46.61	$52.98	$49.33	$47.08

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Adopters (n = 2,641)

Reported Monthly Cost for Home Internet Service	Actual Monthly Cost (reported by broadband adopters) *	Perceived Monthly Cost (reported by broadband non-adopters) **	Difference	2010 OBAS Difference
Statewide	$53.31	$48.64	$4.67	($0.33)
Northwest Coast	$53.39	$57.29	($3.90)	$3.95
Portland Metro	$54.77	$51.84	$2.94	($1.37)
Central Coast	$55.06	$40.62	$14.44	($0.07)
Southwest Oregon	$47.57	$46.59	$0.99	($5.02)
North Central	$46.61	$45.86	$0.75	$8.17
Central Oregon	$52.98	$51.78	$1.20	($0.96)
South Central	$49.33	$56.48	($7.15)	$3.32
Eastern Oregon	$47.08	$43.59	$3.48	($5.12)

** Base Sample Size: Weighted Total Answering Among all Broadband Adopters (n = 2,641)*

*** Base Sample Size: Weighted Total Answering Among All Broadband Non-Adopters (n = 470)*

Appendix A. Key Findings by Region (continued)

Satisfaction with Internet Service	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Overall Satisfaction	n/a	3.97	3.94	3.96	3.96	3.96	3.98	3.99	4.09	3.91
Connection Speed	4.02	3.96	3.92	3.97	3.93	4.00	3.92	4.00	**4.14**	3.78
Cost of Service	3.27	3.20	3.05	3.19	3.10	**3.39**	3.35	3.32	**3.38**	3.33
Ease of Use	4.30	4.29	4.30	4.32	4.27	4.26	4.24	4.25	4.39	4.25
Reliability of Connection	4.05	4.02	3.92	4.03	4.03	4.02	3.91	3.98	**4.10**	3.81

Mean is based on a 5-point scale where "1" indicates "Not at all satisfied" and "5" indicates "Very satisfied"

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Adopters (n = 3,202)

Appendix A. Key Findings by Region (continued)

Satisfaction with Internet Service by County	County	Overall Satisfaction	Ease of Use	Reliability of Connection	Connection Speed	Cost of Service
NW Coast	Clatsop	3.78	4.23	3.74	3.78	2.82
	Columbia	3.83	4.14	3.89	3.94	3.10
	Lincoln	4.05	4.43	4.03	3.95	3.14
	Tillamook*	4.25	4.48	4.02	4.09	3.18
Portland	Clackamas	4.06	4.38	4.15	4.03	3.14
	Multnomah	3.91	4.29	3.96	3.91	3.12
	Washington	4.04	4.38	4.14	4.07	3.34
	Yamhill	3.74	4.10	3.73	3.78	3.12
Central Coast	Benton	3.92	4.36	4.03	3.85	3.51
	Linn	4.18	4.39	4.20	4.05	3.08
	Lane	3.78	4.19	3.86	3.83	2.85
	Marion	4.03	4.27	4.12	4.00	3.35
	Polk	4.20	4.28	4.16	3.94	2.95
SW Oregon	Coos	3.81	4.16	3.83	3.80	3.36
	Curry*	4.25	4.58	4.27	4.19	3.43
	Douglas	3.94	4.10	4.12	3.99	3.57
	Jackson	3.99	4.34	4.03	4.12	3.35
	Josephine	3.91	4.24	3.93	3.78	3.26
North Central	Gilliam*	1.77	2.58	1.77	5.00	1.81
	Hood River*	4.09	4.53	3.77	4.00	3.51
	Morrow*	4.06	4.23	4.00	3.56	3.21
	Sherman*	3.71	4.01	3.84	3.86	3.36
	Umatilla	4.01	4.20	4.00	3.98	3.34
	Wasco*	4.01	4.27	3.95	3.79	3.42
	Wheeler*	3.68	3.94	3.71	3.71	3.16
Central Oregon	Crook	3.77	4.26	3.91	3.60	3.42
	Deschutes	4.02	4.28	4.06	4.08	3.31
	Jefferson*	3.92	3.82	3.04	3.69	3.29
South Central	Grant*	4.26	4.32	4.08	4.15	3.61
	Harney*	3.84	4.30	3.85	3.70	2.90
	Klamath	4.09	4.43	4.15	4.27	3.39
	Lake*	4.09	4.12	3.86	3.52	3.45
Eastern Oregon	Baker*	3.87	4.23	3.85	3.55	3.24
	Malheur*	3.97	4.34	3.97	4.12	3.26
	Union*	3.96	4.25	3.73	3.88	3.42
	Wallowa*	3.61	4.01	3.61	3.19	3.58

Mean is based on a 5-point scale where "1" indicates "Not at all satisfied" and "5" indicates "Very satisfied"

** Note: Cell sizes are small (n = < 20). Care should be taken in using these results.*

Appendix A. Demographic Findings by Region – All Respondents

Gender	Population*	Statewide	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Male	49%	50%	50%	50%	49%	49%	50%	50%	50%	52%
Female	51%	50%	50%	50%	51%	51%	50%	50%	50%	48%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

** Source: 2010 – 2012 American Community Survey 3 – Year Estimates*

Base Sample Size: Weighted Total Answering Among All Respondents (n = 4,017)

Age	Population*	Statewide	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
18 to 24	12%	12%	10%	11%	**16%**	10%	12%	10%	11%	12%
25 to 34	18%	18%	14%	**20%**	17%	13%	17%	16%	14%	14%
35 to 44	17%	16%	14%	**19%**	15%	13%	17%	16%	14%	14%
45 to 54	18%	17%	18%	18%	17%	17%	18%	18%	18%	18%
55 to 64	17%	17%	20%	16%	16%	19%	17%	18%	20%	18%
65 and older	18%	19%	24%	16%	20%	**27%**	19%	22%	24%	24%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

** Source: 2010 – 2012 American Community Survey 3 – Year Estimates*

Base Sample Size: Weighted Total Answering Among All Respondents (n = 3,958)

Income	Population*	Statewide	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Less than $30K	31%	33%	37%	28%	36%	38%	**43%**	30%	**42%**	39%
$30K to $49.9K	20%	23%	21%	22%	25%	23%	23%	26%	25%	**31%**
$50K to $74.9K	19%	18%	20%	19%	19%	18%	16%	14%	17%	13%
$75K or more	30%	26%	22%	**31%**	20%	22%	19%	**30%**	16%	17%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

** Source: 2010 – 2012 American Community Survey 3 – Year Estimates*

Base Sample Size: Weighted Total Answering Among All Respondents (n = 2,997)

Appendix A. Demographic Findings by Region – All Respondents (continued)

Employment Status	Population*	Statewide	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Employed	55%	60%	55%	**66%**	58%	48%	**61%**	51%	47%	51%
Unemployed/ Seeking employment	8%	3%	1%	3%	2%	5%	4%	5%	**6%**	3%
Unemployed/Not seeking employment		2%	2%	2%	2%	2%	1%	3%	2%	3%
Disabled	37%	3%	4%	2%	3%	5%	3%	3%	**8%**	3%
Student		5%	2%	5%	6%	4%	4%	**8%**	5%	4%
Homemaker		3%	4%	3%	4%	3%	3%	2%	4%	3%
Retired		23%	**31%**	18%	24%	**32%**	23%	29%	28%	**33%**

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

** Source: 2010 – 2012 American Community Survey 3 – Year Estimates, age 16+ in the labor force*

Base Sample Size: Weighted Total Answering Among All Respondents (n = 3,877)

Education	Population*	Statewide	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Some High School	11%	7%	6%	6%	8%	8%	**17%**	7%	10%	8%
High School Degree	26%	24%	28%	23%	25%	24%	26%	25%	**31%**	30%
Some college or AA Degree	37%	34%	41%	29%	35%	41%	35%	35%	33%	37%
College +	27%	35%	26%	**42%**	31%	28%	22%	33%	26%	25%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

** Source: 2010 – 2012 American Community Survey 3 – Year Estimates*

Base Sample Size: Weighted Total Answering Among All Respondents (n = 3,851)

Household Composition	Population*	Statewide	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Single Adult	27%	18%	19%	17%	17%	22%	17%	22%	20%	**24%**
Adults Only	43%	48%	50%	47%	48%	49%	45%	48%	49%	41%
Family (with children)	30%	34%	31%	**36%**	35%	29%	**38%**	30%	31%	34%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

**Source: 2010 Census*

Base Sample Size: Weighted Total Answering Among All Respondents (n = 3,848)

Appendix A. Demographic Findings by Region – All Respondents (continued)

Race / Ethnicity	Popu-lation*	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
White	78%	77%	**87%**	73%	78%	**87%**	68%	**86%**	82%	81%
African American	2%	2%	1%	**3%**	1%	1%	1%	1%	< 1%	1%
American Indian	1%	1%	1%	1%	1%	1%	2%	1%	2%	1%
Asian / Pacific Islander	4%	2%	1%	**3%**	1%	1%	2%	< 1%	1%	< 1%
Hispanic	12%	12%	7%	12%	14%	7%	**25%**	9%	10%	14%
Other		< 1%	-	1%	-	< 1%	< 1%	-	< 1%	1%
Mixed	3%	5%	3%	**7%**	5%	3%	2%	4%	5%	2%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

** Source: 2010 – 2012 American Community Survey 3 – Year Estimates*

Base Sample Size: Weighted Total Answering Among All Respondents (n = 3,817)

Own or Rent	Popu-lation*	State-wide	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Own	62%	64%	71%	61%	63%	69%	70%	72%	71%	75%
Rent	38%	36%	29%	**39%**	**37%**	31%	30%	28%	29%	25%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

** Source: 2010 to 2012 American Community Survey 3 – Year Estimates*

Base Sample Size: Weighted Total Answering Among All Respondents (n = 3,722)

Appendix A. Demographic Profiles by Region – Internet Users

Gender	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Male	49%	50%	50%	50%	50%	49%	50%	52%	51%	51%
Female	51%	50%	50%	50%	50%	51%	50%	48%	49%	49%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Users (n = 3,513)

Age	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
18 to 24	14%	14%	11%	12%	**18%**	12%	15%	11%	13%	15%
25 to 34	19%	19%	14%	**21%**	18%	16%	19%	17%	17%	15%
35 to 44	18%	17%	15%	**20%**	15%	15%	16%	17%	16%	16%
45 to 54	19%	17%	19%	18%	16%	16%	19%	17%	17%	19%
55 to 64	17%	17%	21%	16%	17%	18%	17%	18%	19%	17%
65 and Older	14%	16%	20%	13%	17%	**25%**	15%	20%	18%	18%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Users (n = 3,469)

Income	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Less than $30K	17%	28%	34%	25%	32%	32%	36%	26%	37%	29%
$30K to $49.9K	21%	23%	20%	21%	26%	23%	24%	26%	26%	**36%**
$50K to $74.9K	23%	20%	22%	20%	20%	20%	17%	15%	19%	14%
$75K or more	38%	28%	24%	**33%**	22%	25%	23%	**32%**	19%	21%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Users (n = 2,680)

Appendix A. Demographic Profiles by Region – Internet Users (continued)

Employment Status	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Employed	61%	64%	61%	**70%**	62%	52%	64%	53%	55%	56%
Unemployed/Seeking employment	15%	4%	1%	4%	3%	5%	4%	5%	6%	2%
Unemployed/Not seeking employment		2%	2%	2%	1%	2%	2%	3%	2%	3%
Disabled		2%	3%	2%	2%	4%	3%	3%	5%	3%
Student	8%	6%	3%	5%	7%	5%	5%	8%	6%	5%
Homemaker	1%	3%	2%	3%	3%	3%	4%	1%	**5%**	3%
Retired	17%	20%	27%	15%	21%	**30%**	18%	26%	22%	28%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Users (n =3,409)

Education	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Some High School	4%	5%	4%	4%	6%	5%	**12%**	4%	7%	5%
High School Degree	22%	23%	26%	22%	22%	22%	24%	24%	27%	27%
Some college or AA Degree	32%	34%	42%	29%	37%	43%	39%	36%	36%	39%
College +	42%	38%	28%	**45%**	35%	30%	25%	36%	29%	29%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Users (n = 3,392)

Household Composition	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Single Adult	8%	15%	16%	14%	14%	18%	15%	18%	16%	19%
Adults Only	52%	49%	49%	49%	50%	52%	46%	50%	50%	46%
Family (with children)	41%	36%	34%	37%	36%	30%	40%	32%	35%	35%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Users (n = 3,388)

Appendix A. Demographic Profiles by Region – Internet Users (continued)

Race / Ethnicity	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
White	79%	79%	**88%**	74%	81%	**89%**	72%	**88%**	82%	83%
African American	2%	2%	1%	**3%**	1%	1%	1%	1%	< 1%	< 1%
American Indian	1%	1%	1%	2%	1%	1%	2%	-	3%	2%
Asian / Pacific Islander	5%	2%	2%	**3%**	2%	1%	3%	< 1%	1%	< 1%
Hispanic	10%	10%	6%	10%	11%	5%	**20%**	7%	9%	11%
Other	1%	1%	-	1%	-	< 1%	< 1%	-	-	1%
Mixed	3%	6%	3%	**7%**	5%	4%	2%	4%	6%	2%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Users (n = 3,350)

Own or Rent	2010 OBAS	State-wide	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Own	76%	65%	72%	62%	63%	69%	73%	73%	72%	78%
Rent	24%	35%	28%	**38%**	**37%**	31%	27%	27%	28%	22%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Users (n = 3,307)

Demographic Profiles by Region – Internet Non-Users

Gender	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Male	48%	47%	44%	45%	47%	50%	51%	37%*	47%	52%
Female	52%	53%	56%	55%	53%	50%	49%	**63%***	53%	48%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.
**The male/female breakdown among Internet Non-Users in Central Oregon could be considered an outlier.*
Base Sample Size: Weighted Total Answering Among All Internet Non-Users (n = 504)

Age	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
18 to 24	4%	2%	-	3%	1%	3%	-	-	2%	3%
25 to 34	9%	10%	14%	12%	14%	1%	12%	-	4%	12%
35 to 44	14%	10%	4%	11%	11%	5%	**19%**	9%	9%	9%
45 to 54	18%	18%	11%	15%	21%	24%	15%	24%	20%	12%
55 to 64	15%	17%	18%	14%	15%	26%	17%	16%	23%	24%
65 and Older	41%	42%	53%	44%	38%	42%	37%	50%	43%	41%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.
Base Sample Size: Weighted Total Answering Among All Internet Non-Users (n = 488)

Income	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Less than $30K	52%	68%	57%	65%	73%	68%	74%	73%	65%	73%
$30K to $49.9K	28%	21%	26%	24%	19%	23%	15%	15%	24%	11%
$50K to $74.9K	11%	6%	7%	8%	5%	2%	9%	6%	11%	13%
$75K or more	9%	4%	10%	3%	3%	6%	1%	6%	-	3%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.
Base Sample Size: Weighted Total Answering Among All Internet Non-Users (n = 318)

Appendix A. Demographic Profiles by Region – Internet Non-Users (continued)

Employment Status	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Employed	31%	30%	19%	32%	29%	29%	**48%**	27%	19%	36%
Unemployed/Seeking employment	21%	3%	-	3%	-	6%	3%	4%	6%	7%
Unemployed/Not seeking employment		5%	-	**9%**	3%	5%	1%	2%	2%	4%
Disabled		8%	7%	5%	10%	11%	3%	8%	**17%**	2%
Student	1%	1%	-	2%	-	-	-	-	-	-
Homemaker	< 1%	6%	**15%**	4%	10%	5%	2%	4%	3%	2%
Retired	43%	47%	59%	45%	47%	44%	43%	54%	51%	48%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Non-Users (n = 469)

Education	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Some High School	15%	24%	18%	21%	26%	25%	**42%**	28%	21%	16%
High School Degree	48%	36%	39%	30%	45%	31%	35%	33%	42%	41%
Some college or AA Degree	26%	27%	30%	31%	22%	28%	14%	27%	21%	30%
College +	11%	14%	13%	17%	8%	16%	9%	12%	16%	14%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Non-Users (n = 459)

Household Composition	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Single Adult	20%	44%	39%	48%	40%	45%	30%	**61%**	34%	41%
Adults Only	59%	34%	**53%**	31%	35%	31%	40%	26%	48%	27%
Family (with children)	21%	23%	8%	21%	25%	24%	30%	13%	17%	**32%**

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Non-Users (n = 460)

Appendix A. Demographic Profiles by Region – Internet Non-Users (continued)

Race / Ethnicity	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
White	79%	67%	78%	66%	62%	74%	53%	68%	**81%**	74%
African American	3%	3%	-	**8%**	1%	1%	3%	-	1%	2%
American Indian	1%	2%	4%	-	3%	3%	-	6%	2%	-
Asian / Pacific Islander	< 1%	< 1%	-	-	-	1%	1%	-	-	-
Hispanic	14%	25%	17%	22%	33%	21%	**42%**	24%	13%	22%
Other	1%	< 1%	-	1%	-	-	-	-	2%	-
Mixed	2%	3%	2%	4%	2%	1%	1%	2%	2%	2%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Non-Users (n = 467)

Own or Rent	2010 OBAS	State-wide	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Own	64%	40%	37%	**47%**	41%	29%	42%	38%	34%	34%
Rent	36%	60%	63%	53%	59%	**71%**	58%	62%	66%	66%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Internet Non-Users (n = 415)

Demographic Profiles by Region – Broadband Adopters

Gender	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Male	50%	50%	49%	50%	50%	50%	50%	51%	51%	53%
Female	50%	50%	51%	50%	50%	50%	50%	49%	49%	47%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Adopters (n = 3,309)

Age	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
18 to 24	13%	14%	9%	12%	**19%**	12%	16%	10%	11%	15%
25 to 34	20%	19%	14%	**21%**	18%	16%	18%	16%	16%	15%
35 to 44	18%	17%	16%	19%	15%	14%	16%	18%	17%	17%
45 to 54	19%	17%	20%	18%	15%	15%	19%	17%	18%	19%
55 to 64	17%	17%	21%	16%	16%	19%	17%	19%	19%	17%
65 and older	13%	16%	20%	12%	17%	**24%**	15%	20%	19%	17%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Adopters (n = 3,269)

Income	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Less than $30K	16%	27%	31%	23%	30%	30%	34%	24%	33%	27%
$30K to $49.9K	20%	24%	21%	21%	27%	23%	26%	28%	27%	**36%**
$50K to $74.9K	24%	20%	**23%**	21%	20%	21%	17%	16%	20%	15%
$75K or more	40%	30%	25%	**35%**	23%	26%	24%	**33%**	21%	22%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Adopters (n = 2,519)

Appendix A. Demographic Profiles by Region – Broadband Adopters (continued)

Employment Status	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Employed	63%	64%	61%	**70%**	62%	52%	63%	54%	56%	57%
Unemployed/Seeking employment	15%	3%	1%	3%	2%	**5%**	4%	4%	4%	2%
Unemployed/Not seeking employment		2%	3%	2%	1%	2%	2%	3%	3%	3%
Disabled		2%	3%	2%	2%	3%	3%	2%	**5%**	3%
Student	8%	6%	3%	5%	7%	5%	6%	8%	5%	5%
Homemaker	1%	3%	2%	3%	4%	3%	4%	2%	5%	3%
Retired	17%	20%	27%	15%	21%	**29%**	19%	27%	23%	27%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Adopters (n = 3,214)

Education	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Some High School	4%	5%	4%	3%	6%	5%	**12%**	4%	5%	5%
High School Degree	21%	22%	24%	21%	22%	22%	23%	23%	27%	26%
Some college or AA Degree	32%	34%	43%	29%	37%	42%	39%	37%	37%	39%
College +	43%	39%	29%	**46%**	35%	31%	25%	36%	31%	29%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Adopters (n = 3,198)

Household Composition	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Single Adult	7%	14%	14%	13%	13%	17%	14%	17%	16%	17%
Adults Only	52%	50%	49%	49%	50%	53%	47%	51%	48%	47%
Family (with children)	41%	36%	36%	38%	37%	30%	39%	32%	37%	37%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Adopters (n = 3,192)

Appendix A. Demographic Profiles by Region – Broadband Adopters (continued)

Race / Ethnicity	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
White	79%	79%	89%	75%	80%	89%	74%	89%	83%	85%
African American	2%	1%	1%	**2%**	< 1%	1%	1%	-	< 1%	-
American Indian	1%	1%	1%	2%	1%	1%	1%	< 1%	3%	2%
Asian / Pacific Islander	4%	2%	2%	**3%**	2%	1%	3%	< 1%	1%	1%
Hispanic	10%	9%	5%	9%	12%	5%	**19%**	6%	7%	10%
Other	1%	1%	-	1%	-	< 1%	< 1%	-	-	-
Mixed	3%	6%	3%	**7%**	5%	4%	2%	4%	6%	2%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Adopters (n = 3,153)

Own or Rent	2010 OBAS	State-wide	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Own	76%	66%	75%	63%	63%	69%	73%	75%	73%	80%
Rent	24%	34%	25%	**37%**	**37%**	31%	27%	25%	27%	20%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Adopters (n = 3,121)

Demographic Profiles by Region – Broadband Non-Adopters[27]

Gender	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Male	47%	48%	50%	49%	48%	45%	50%	47%	48%	48%
Female	53%	52%	50%	51%	52%	55%	50%	53%	52%	52%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.
Base Sample Size: Weighted Total Answering Among All Broadband Non-Adopters (n = 708)

Age	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
18 to 24	10%	5%	11%	5%	3%	6%	-	5%	9%	6%
25 to 34	9%	12%	14%	16%	11%	4%	17%	11%	8%	13%
35 to 44	14%	12%	5%	16%	13%	8%	**19%**	10%	8%	8%
45 to 54	17%	19%	11%	15%	22%	**25%**	15%	23%	17%	14%
55 to 64	15%	16%	19%	13%	16%	18%	17%	15%	23%	20%
65 and Older	34%	36%	39%	35%	35%	39%	32%	36%	35%	38%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.
Base Sample Size: Weighted Total Answering Among All Broadband Non-Adopters (n = 689)

Income	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Less than $30K	46%	65%	60%	62%	68%	66%	72%	65%	69%	67%
$30K to $49.9K	29%	22%	21%	25%	20%	23%	14%	15%	21%	17%
$50K to $74.9K	13%	9%	7%	10%	10%	6%	11%	7%	10%	11%
$75K or more	12%	5%	12%	4%	2%	5%	3%	**13%**	-	6%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.
Base Sample Size: Weighted Total Answering Among All Broadband Non-Adopters (n = 478)

[27] Broadband Non-Adopters includes dial-up users, Internet non-users and those who use the Internet but not at home.

Appendix A. Demographic Profiles by Region – Broadband Non-Adopters (continued)

Employment Status	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Employed	39%	38%	35%	43%	34%	34%	**55%**	35%	26%	40%
Unemployed/Seeking employment	19%	5%	2%	5%	2%	4%	2%	9%	**10%**	6%
Unemployed/Not seeking employment		4%	-	**6%**	3%	3%	1%	1%	2%	4%
Disabled		7%	6%	5%	9%	11%	4%	9%	13%	3%
Student	3%	2%	< 1%	2%	2%	< 1%	< 1%	6%	5%	1%
Homemaker	< 1%	5%	**11%**	3%	8%	5%	2%	2%	2%	4%
Retired	37%	39%	47%	35%	41%	42%	36%	38%	41%	44%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Non-Adopters (n = 663)

Education	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Some High School	12%	20%	11%	20%	20%	20%	**33%**	20%	24%	14%
High School Degree	44%	35%	43%	33%	39%	30%	38%	34%	40%	38%
Some college or AA Degree	28%	29%	31%	31%	26%	**36%**	19%	29%	23%	31%
College +	16%	16%	15%	16%	15%	15%	10%	17%	14%	17%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Non-Adopters (n = 652)

Household Composition	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Single Adult	18%	40%	38%	41%	40%	42%	29%	**49%**	30%	41%
Adults Only	57%	36%	**51%**	34%	36%	34%	37%	31%	**54%**	30%
Family (with children)	25%	24%	11%	25%	24%	24%	34%	20%	16%	29%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Non-Adopters (n = 657)

Appendix A. Demographic Profiles by Region – Broadband Non-Adopters (continued)

Race / Ethnicity	2010 OBAS	State-wide	NW Coast	Port-land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
White	80%	68%	79%	64%	66%	77%	51%	71%	78%	72%
African American	2%	4%	-	6%	2%	2%	3%	4%	1%	2%
American Indian	1%	1%	2%	-	2%	3%	2%	3%	2%	-
Asian / Pacific Islander	2%	< 1%	-	1%	-	< 1%	< 1%	-	< 1%	-
Hispanic	12%	23%	17%	23%	25%	16%	**41%**	20%	16%	21%
Other	< 1%	< 1%	-	< 1%	-	-	-	-	1%	2%
Mixed	2%	4%	2%	**5%**	4%	1%	1%	1%	2%	2%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

Base Sample Size: Weighted Total Answering Among All Broadband Non-Adopters (n = 664)

Own or Rent	2010 OBAS	State-wide	NW Coast	Portland	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
Own	64%	57%	56%	48%	61%	70%	62%	59%	65%	66%
Rent	36%	43%	44%	**52%**	39%	30%	38%	41%	35%	34%

Numbers shaded in yellow are significantly higher and numbers shaded in orange are significantly lower than at least one other number in the row.

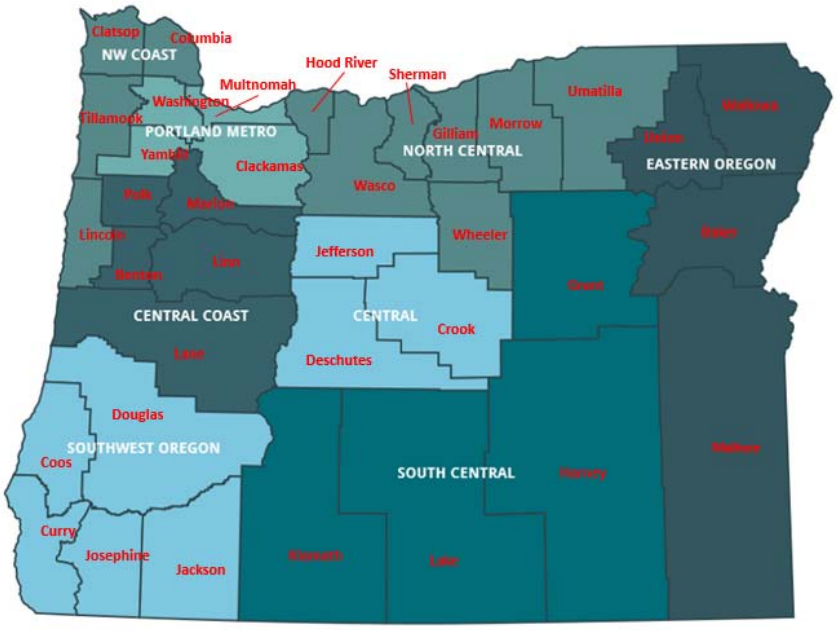
Base Sample Size: Weighted Total Answering Among All Broadband Non-Adopters (n = 601)

Appendix B. Detailed Methodology

A total of 4,017 surveys were completed throughout the state of Oregon: 2,860 with a random-digit-dial (RDD) sample of landline telephone numbers and 1,157 with a random sample of cell phone numbers. The resulting margin of error for the entire sample is no greater than plus or minus 1.5 percentage points at a 95% confidence level. Both landline and cellphone sample types were purchased from Scientific Telephone Samples (STS), a leading U.S.-based sample provider. Telephone surveys were conducted by ISA Corporation, a leading U.S.-based data collection company.

Region	Counties
NW Coast	Clatsop
	Columbia
	Lincoln
	Tillamook
Portland	Clackamas
	Multnomah
	Washington
	Yamhill
Central Coast	Benton
	Linn
	Lane
	Marion
	Polk
SW Oregon	Coos
	Curry
	Douglas
	Jackson
	Josephine
North Central	Gilliam
	Hood River
	Morrow
	Sherman
	Umatilla
	Wasco
	Wheeler
Central Oregon	Crook
	Deschutes
	Jefferson
South Central	Grant
	Harney
	Klamath
	Lake
Eastern Oregon	Baker
	Malheur
	Union
	Wallowa

As with the 2010 Oregon Broadband Adoption Study, the sample targeted eight geographic areas, with between 373 and 532 interviews completed in 7 of the 8 regions identified. Due to the size and diversity within the Portland metropolitan area, 1,024 interviews were completed there to capture the most representative sample of this region.



Sampling

The sample plan was designed to mirror that of the 2010 Broadband Adoption Survey. The goal was to achieve an estimated sample size around 400 per region, except for the Portland metro area where the goal number of completes was higher due to greater variance in the more diverse market. The table below details the actual sample sizes achieved in each region (number of completed surveys in each region) and the resulting margin of error based on the sample sizes and actual population counts.

Also shown is the breakdown of completes by landline and cell phone sample. Cell phone sample was used to ensure representation of households that have only cell phones and those that primarily use their cell phones.

	Total	NW Coast	Port - land	Central Coast	SW Oregon	North Central	Central Oregon	South Central	Eastern Oregon
House-holds	1,512,696	65,604	685,309	364,733	196,371	50,461	81,937	37,917	30,364
% of HH		4%	45%	24%	13%	3%	5%	3%	2%
Population age 18 +	3,036,930	126,119	1,387,159	743,539	384,892	104,729	158,911	69,914	61,666
% of Population		4%	46%	24%	13%	3%	5%	2%	2%
Landline Sample	2,860	306	605	362	353	326	312	300	296
Cell Phone Sample	1,157	81	405	169	146	99	100	78	79
Total n=	4017	373	1024	532	510	427	404	373	374
% of Sample		10%	25%	13%	12%	11%	10%	9%	9%
Precision		+/-4.9%	+/-3.1%	+/-4.2%	+/-4.4%	+/-4.7%	+/-4.8%	+/-5%	+/-5%

Data Collection

Data collection was completed by ISA, one of the largest and most reputable data collection companies in the country. ISA is based in Los Angeles, was founded in 1982 and currently has a 350-station CATI-based call center. They are also experts in researching the Hispanic and Asian markets in North America.

Data collection by telephone using the dual-frame sample plan described above continues to be the most reliable methodology to reach a random and representative sample of all households.

Data collection occurred from February 11, 2014, through April 2, 2014. Calls were completed in the evenings (4:00 to 8:30 P.M. PST), and on Saturday (10:00 A.M. to 8:00 P.M. PST). A small number of shifts were scheduled during daytime hours to find those respondents with non-standard work schedules.

Daily interviewing averaged a supervisor-to-interviewer ratio of 1:10. ISA continually monitored data collection. Interviewers were monitored at random, and as standard practice, each was monitored through a complete interview at least once per shift.

A supervisor was immediately available to handle any questions that came up during a live interview. Call records and data were reviewed daily to verify that sample specifications were met and data quality was maintained.

Every evening after the shift for that day, Pivot Group was provided with, and subsequently reviewed, a detailed progress report to verify quota balancing and progress.

Sample Management

When deciding on the telephone sampling methodology to use, it is important to consider the statistical validity of the sampling method. When statistical accuracy is of key importance, sampling via an RDD methodology is the preferred method – especially due to the large and growing number of unlisted telephones. RDD samples are completely representative of the sampling universe or frame.

Although RDD samples are more representative, they are less efficient than “listed” samples -- especially for very low-incidence target audiences. For this survey, it was necessary to start using listed sample later in the data collection process in order to reach the younger demographic (ages 18-24).

All sampling and call management tasks such as scheduling of callbacks, call dispositions, quota controls and interviewer productivity, was handled by ISA’s computer-assisted telephone interviewing (CATI) networked system. ISA uses CfMC’s WebCATI, enabling the ability to handle the most complex questionnaires and sample design.

Landline sample was dialed automatically with a predictive dialer. Using a predictive maximizes call efficiency since busy, no answer, and unobtainable numbers are detected instantly, which minimizes the amount of time interviewers must wait before being connected with respondents. At the time of this survey, government regulations don’t allow predictive dialers to be used when dialing cell phone numbers.

Contact and Sample Management

Pivot Group developed and led a very detailed briefing process to ensure the same data collection procedures and protocols that were used in 2010 were followed. This was very important for upholding the objective of achieving consistent and accurate comparisons between 2010 and 2014 findings.

These procedures and protocols are listed below:

- For RDD and age-targeted samples, a minimum of seven and a maximum of 15 attempts were made to households that had not yet been converted into a completed interview. Calls were attempted on different days and at different times to increase the probability of reaching someone. An interview was considered complete only if the respondent answered a majority of the demographic questions at the end of the survey.
- For cell phone sample, a minimum of three and a maximum of five attempts were made to each number, on different days and at different times to increase the probability of reaching someone.
- Callbacks were scheduled with the selected member of the household if he or she was not immediately available or the individual on the phone was unable or unwilling to pass the phone to someone else.
- For RDD and age-targeted samples, a maximum of two conversion attempts was made on all initial/soft refusals throughout the data collection period.
- For cell phone sample, one conversion attempt was made on all initial/soft refusals throughout the data collection period.

Respondent Characteristics and Weighting

Men and younger individuals are consistently underrepresented in purely RDD survey samples. The difficulty in reaching them is due to a combination of higher level of mobility and greater use of cell phones / smart phones, as well as a relatively lower receptiveness to completing surveys in general. As a result, it is necessary to ensure representation of these key segments to minimize requirements for post stratification weighting. Measures that were taken to optimize representation of these groups include:

- Setting firm quota caps on age groups that are easier to reach;
- Use of age-targeted listed sample to reach those 18 to 24; and
- An increased use of cell phone sample to reach the younger age groups.

In addition to the sampling methodology listed above, the final data was weighted to more accurately reflect the actual population. Probability sampling assumes that each household has a known and nonzero probability of selection. In telephone surveys today, all households do not have an equal probability of selection. Weighting adjusts for the probability of being selected resulting from multiple telephone lines in the household, households without telephones, cell-phone-only households, and number of adults in the household.

Post stratification weighting adjusts the sample so that the distribution of the sample reflects the target population and acts as a nonresponse correction. Household weighting adjusts for the number of single-person versus multiple-person households, for primary racial and ethnic makeup of the households, and for home ownership. Respondent weighting adjusts for distribution of age within gender and for race / ethnicity.

The table below shows the distribution of actual geographic and demographic characteristics of this survey's sample, the actual Oregon population, and the distribution achieved after applying the weighting scheme. Note the "Weighted Sample" distribution is the distribution on which all findings in the report are based.

	Unweighted Sample	Oregon Population*	Weighted Sample
Oregon Region			
Northwest Coast	9%	4%	4%
Portland Metro	25%	46%	46%
Central Coast	13%	24%	24%
Southwest Oregon	13%	13%	13%
North Central	11%	3%	3%
Central Oregon	10%	5%	5%
South Central	9%	2%	2%
Eastern Oregon	9%	2%	2%
Gender			
Male	48%	49%	50%
Female	52%	51%	50%
Age			
18 to 24	10%	12%	12%
25 to 34	13%	18%	18%
35 to 44	15%	17%	16%
45 to 54	20%	18%	17%
55 to 64	21%	17%	17%
65 or older	21%	18%	19%
Race			
White (Non-Hispanic)	80%	78%	77%
Black (Non-Hispanic)	1%	2%	2%
Native American (Non-Hispanic)	1%	1%	1%
Asian / Pacific Islander (Non-Hispanic)	2%	4%	2%
Other / Hispanic	7%	12%	13%
Two or more races	4%	3%	5%
Ethnicity			
Hispanic	7%	12%	12%
Non-Hispanic	93%	88%	88%
Frame Type			
Cell Phone Only	19%	38%	38%
Both Landline and Cell Phone	62%	53%	53%
Landline Only	18%	9%	9%

*Sources:
Household Type by Tenure- Data Set: 2010-2012 American Community Survey 3 and 5 – Year Estimates
Age and Sex- Data Set: 2012 American Community Survey 1, 3 and 5 – Year Estimates
ACS Demographic and Housing Estimates- 2012 American Community Survey 1, 3 and 5 – Year Estimates
Wireless Substitution: State-level Estimates from the National Health Interview Survey, January – December 2011

Margin of Sampling Error Explained

In any quantitative study, sample size considerations are very important in order to achieve appropriate and accurate representation of the population. Since surveying the entire population isn't feasible, a certain amount of risk comes into play that the sample doesn't accurately represent the population being studied. The larger the sample size, the lower this risk. Ultimately, we must accept some level of risk, and it's measured by a statistic called "margin of sampling error."

Sampling error is the extent to which the results may differ from what would be obtained if the whole population were surveyed. The margin of error is a statistic expressing the amount of random sampling error in a survey's results. The larger the margin of error, the less faith one should have that the survey's reported results are close to the true figures, that is, the figures for the whole population. The margin of error decreases as the sample size increases, but only to a point. The margin of error for the entire sample in the Oregon Broadband Adoption Survey is no greater than plus or minus 1.5 percentage points at a 95% confidence level. This means that if the survey were duplicated in the same time frame with a different 4,000 respondents who were sampled in the same fashion, 95 times out of 100, the same result would occur, within the stated range would be achieved (i.e., +/- 1.5%).

As an example, this survey found that 60% of 4,017 randomly sampled Oregonians use a smart phone. This means we can say we are 95% confident that the proportion of Oregonians who use a smart phone is actually in the range of 58.5% and 61.5%.

Appendix C. 2014 Survey Questionnaire

Below is the actual questionnaire (English version) used for the telephone interviews. The Spanish-translation is available upon request.

Introduction

[PROGRAMMING: SECTION FOR TIMING]

INTRO1 [RDD AND AGE-TARGETED SAMPLE]

Hello, this is _____ with Pivot Group, an independent market research firm based in Portland. I am calling on behalf of the State of Oregon. We are conducting a survey among Oregon residents about communication and technology and would like to include your input.

[PROGRAMMING - RANDOMLY SHOW MALE INTRO OR YOUNGEST INTRO 50/50]

[YOUNGEST INTRO] For this survey I would like to speak with the ***youngest*** member of this household who is 18 years of age and older? Would that be you?

[INTERVIEWING NOTE: IF YOUNGEST PERSON UNAVAILABLE, SCHEDULE CALL-BACK]

[MALE INTRO] For this survey I would like to speak with the ***male*** member of this household who is 18 years of age and older? Would that be you?

[INTERVIEWING NOTE: IF MALE UNAVAILABLE, SCHEDULE CALL-BACK; IF NO MALE IN THE HOUSEHOLD, ASK FOR YOUNGEST FEMALE]

[INTERVIEWING NOTE: IF UNAVAILABLE, SCHEDULE CALL-BACK]

1 RESPONDENT AVAILABLE [CONTINUE TO INTRO2]
2 NO ONE IN HH 18 YEARS OF AGE OR OLDER – [SKIP TO THANKAGE]
9 DON'T KNOW/REFUSED [SKIP TO THANKREF]

INTRO2 (WITH RESPONDENT)

[IF NEW PERSON ON THE PHONE:] Hello, this is _____ with Pivot Group, an independent market research firm based in Portland. I am calling on behalf of the State of Oregon. We are conducting a survey among Oregon residents about communication and technology and would like to include your input. Let me assure you that this is not a sales call and everything you say will remain strictly anonymous. Your name and telephone number will not end up on any list as a result of your participation. This call maybe monitored or recorded for quality control purposes.

INTRO CELL [CELL SAMPLE TYPE 1]

Hello,this _____ with Pivot Group, an independent market research firm based in Portland. I am calling on behalf of the State of Oregon. We are conducting a survey among Oregon residents about communication and technology and would like to include your input.

This study is being conducted for research purposes only, and this call may be monitored and/or recorded for quality control purposes. Let me assure you that this is not a sales call and everything you say will be kept strictly confidential.

First of all, are you currently driving? **IF YES:** When is a more convenient time to call you back?

For this survey I would like to speak with someone who is 18 years of age and older? Would that be you?

[AS NEEDED: This survey will provide important data that will help the state improve access to technology, so your participation is very important. This survey will last approximately 15 minutes.]

1 CONTINUE – NOT DRIVING
2 NO ONE 18 YEARS OF AGE OR OLDER IN HH – NQ AGE
3 IMMEDIATE/SOFT REFUSAL – [CALLBACK TO REFUSAL CONVERT]
4 FINAL REFUSAL [REFUSAL]
9 DK – SCREENER REFUSAL

Screening Questions

LANG Which language do you prefer to use or are you most comfortable expressing your opinions in? **[ONE RESPONSE ONLY]**

1 ENGLISH [SKIP TO CTY]
2 SPANISH [SKIP TO SPANISHCALLBACK]
3 VIETNAMESE
4 CHINESE
5 KOREAN
6 OTHER [SPECIFY]
9 DON'T KNOW / REFUSED

LANG2 **[ASK IF LANG=3 | LANG=4 | LANG=5 | LANG=6 | LANG=9]** May I speak to another adult household member who would be most comfortable speaking English?

1 YES
2 NO / NO ONE AVAILABLE **[SKIP TO THANKLANG**]

INTRO2A **[ASK IF LANG2=1]**

[WHEN NEW PERSON GETS ON THE PHONE]: Hello, this is _____ with Pivot Group, an independent market research firm based in Portland. I am calling on behalf of the State of Oregon. We are conducting a survey among Oregon residents about communication and technology and would like to include your input. Let me assure you that this is not a sales call and everything you say will remain strictly anonymous. Your name and telephone number will not end up on any list as a result of your participation. This call maybe monitored or recorded for quality control purposes.

CTY **[ASK IF COUNTY FROM SAMPLE IS AVAILABLE]** Do you live in **<INSERT COUNTY FROM SAMPLE>** County?

1 YES **[SKIP TO ZIPCO]**
2 NO
9 DON'T KNOW / REFUSED

CTY2 **[ASK IF CTY >1 OR IF COUNTY IS NOT AVAILABLE IN SAMPLE]** What county do you live in?

1	Baker	17	Deschutes	33	Josephine	49	Morrow	65	Wasco
3	Benton	19	Douglas	35	Klamath	51	Multnomah	67	Washington
5	Clackamas	21	Gilliam	37	Lake	53	Polk	69	Wheeler
7	Clatsop	23	Grant	39	Lane	55	Sherman	71	Yamhill
9	Columbia	25	Harney	41	Lincoln	57	Tillamook		
11	Coos	27	Hood River	42	Linn	59	Umatilla		
13	Crook	29	Jackson	45	Malheur	61	Union		
15	Curry	31	Jefferson	47	Marion	63	Wallowa		

98 None of the above / Not an Oregon County **[SKIP TO THNKAREA]**
99 DON'T KNOW / REFUSED **[SKIP TO THANKREF]**

[PROGRAMMING NOTE: CALCULATE CTY AND REGION QUOTAS]

SCR1. What is your zip code?

____ ENTER ZIP CODE
99999 DON'T KNOW / REFUSED

SCR2. For statistical purposes only, can I have your age please?

___ ENTER AGE
99 DON'T KNOW / REFUSED

SCR2A. [ASK IF SCR2 = 99] Are you… [CALCULATE AGE_CAT]

1. 18 to 24
2. 25 to 34
3. 35 to 44
4. 45 to 54
5. 55 to 64
6. 65 or older
9. DON'T KNOW / REFUSED

GENDER. ENTER RESPONDENT'S GENDER

1. MALE
2. FEMALE

Access to Technology

PHONE1 **[ASK IF CELL PHONE SAMPLE]** In addition to your cell-phone, do you have a landline in your home that is used to make and receive calls? **READ:** By landline telephone we mean a "regular" telephone in your home that is connected to outside telephone lines through a cable or cord and is used to make and receive calls.

[READ IF NECESSARY: By cell-phone we mean mobile or wireless cell phone, smart phone, P-C-S or prepaid cell phone service.]

1 YES
2 NO
9 DON'T KNOW / REFUSED

PHONE2 **[IF RDD OR AGE-TARGETED SAMPLE]** In addition to your landline, do you have a cell-phone that is used to make or receive calls?

[READ IF NECESSARY: By cell-phone we mean mobile or wireless cell phone, smart phone, P-C-S or prepaid cell phone service.]

1 YES
2 NO
9 DON'T KNOW / REFUSED

PHONE3 **[ASK IF PHONE1=1 OR PHONE2=1]** Do you primarily use your cell phone, or your landline, to make and receive calls?

1 PRIMARILY CELL PHONE
2 PRIMARILY LANDLINE
3 BOTH EQUALLY
9 DON'T KNOW / REFUSED

PHONE4 **[ASK IF (RDD SAMPLE OR AGE TARGETED SAMPLE OR PHONE1=1)]** How many **landline** telephone numbers are associated with this household? Please do **not** include cellular telephone service.

[**READ IF NECESSARY:** By landline telephone we mean a "regular" telephone in your home that is connected to outside telephone lines through a cable or cord and is used to make and receive calls.]

___ ENTER NUMBER **[VALID RANGE: 1-98; CANNOT BE 0]**
99 DON'T KNOW / REFUSED

PHONE5 **[ASK IF PHONE4 > 1 AND PHONE4 < 99]** How many landline telephone lines in your household are currently used only for non-voice communications, such as a dedicated fax or modem line?

[READ IF NECESSARY: Do NOT include cellular telephone service.]

___ ENTER NUMBER **[VALID RANGE: 0-98 MUST BE ≤ ANSWER IN PHONE4]**
99 DON'T KNOW / REFUSED

PHONE6 **[ASK IF CELL SAMPLE OR PHONE2=1]** How many **cell phone** numbers are associated with this household? Please include all cell phones for every member of the house and please do **not** include landline telephone service.

___ ENTER NUMBER **[VALID RANGE: 1-98; CANNOT BE 0]**
99 DON'T KNOW / REFUSED

AA1. Next, I would like to read a list of some technology that you might have at home. As I read the following list of items, please tell me if you, personally, happen to have each one at home, or not. Do you have…

[RANDOMIZE C – L]

1. YES
2. NO
9. DON'T KNOW / REFUSED

C A working desktop computer
D. A working laptop or notebook computer
E. Internet access
G. **[ASK IF CELL SAMPLE OR PHONE2=1**] A "smart phone" such as i-Phone, or Android phone
J. A game console like Xbox or PlayStation
K. A tablet computer like an iPad
L. An e-mail account

AA1b. **[ASK IF YES TO AA1-E]** Do you personally access the Internet using **[INSERT AA1 RESPONSE]** while at home?
INSERT AA1 RESPONSES THEY SELECTED AMONG C, D, G, J AND K

1. YES
2. NO

AA1c. **[ASK IF YES TO AA1-E]** Which of these is your <u>primary</u> method for using the Internet while at home?
LIST AA1b RESPONSES TO WHICH THEY SAID YES, AND SELECT ONLY ONE

L2. **[ALWAYS FOLLOW L – ASK IF L = 1**] How many email address are associated with the members of this household?

___ ENTER RESPONSE
999 DON'T KNOW/REFUSED

AA2 . **[ASK IF: AA1C=1 OR AA1D = 1]** Does your computer or laptop have a wireless internet connection device or wireless card?

1. YES
2. NO
9. DON'T KNOW / REFUSED

Access to Internet

A1. Do you personally use the Internet?

1. YES
2. NO
9. DON'T KNOW / REFUSED **[SKIP TO THANKREF]**

A1A. **[ASK IF A1=1]** How many years have you personally used the Internet?

[READ IF NECESSARY]

1. Less than a year
2. 1 to 2 years
3. 3 to 5 years
4. Over 5 years
9. DON'T KNOW / REFUSED

A1B. Does anyone else in your household use the Internet?

1. YES
2. NO
9. DON'T KNOW / REFUSED

A1C. **[ASK IF A1B=1]** Who else in your household uses the Internet? **[SELECT ALL THAT APPLY]**

[DO NOT READ LIST: IF RESPONDENT SAYS "MY CHILD" ASK "WOULD THAT BE A CHILD UNDER OR OVER 18?]

1. YOURSELF
2. YOUR SPOUSE
3. A CHILD OVER 18 LIVING AT HOME
4. A CHILD UNDER 18 LIVING AT HOME
5. A PARENT
6. OTHER (SPECIFY)
7. ROOMMATE
8. SIBLING
9. DON'T KNOW / REFUSED

A2. **[ASK IF A1=1]** I am going to list some places where the Internet is commonly available. Please tell me which of these places you use to access the Internet . . . **[READ LIST]**

[RANDOMIZE A – G]

1. YES
2. NO
9. DON'T KNOW / REFUSED

A. At Home
B. At Work
C. At School
D. At a Public Library
E. At a Community Center
F. At someone else's house
G. At a café, or other business

A3. **[ASK IF A2A=1]** What type of Internet connection do you have at home?

[MULTIPLE SELECT. IF RESPONDENT INITIALLY REPLIES WITH "DON'T KNOW" THEN READ LIST AND DESCRIPTIONS AS NECESSARY]

1. Dial-up telephone line
2. DSL-enabled phone line (such as Centurylink or AT&T)
3. Cable modem with a cable company (such as Comcast or Charter)
4. Fiber optics (such as Frontier's FIOS **[pronounced "fye-hose"]** or a private connection)
5. Satellite internet service
6. Mobile / Cellular (Internet access through your cell-phone provider).
7. Other (enter verbatim: _____]
8. Wireless or Wi-Fi through the home's router or network
9. Fixed wireless (such as Clear or Freewire Broadband)
10. High speed (unspecified)

99. Don't know / refused

A3a. **[ASK IF A3 > 6]** Can you tell me what company you use to access the Internet at home? (**IF NECESSARY:** Who do you pay for your Internet access?) **[READ LIST AS NEEDED] [ALLOW MULTIPLE SELECTIONS]**

1	AOL (dial-up)	13	Freewire Broadband (fixed wireless)
2	AT&T (cell phone / wireless)	14	Frontier Communications (DSL or Fiber Optics)
3	Budget (dial-up)	15	HughesNet (satellite)
4	Cable One (cable)	16	Net Zero (dial-up)
5	CenturyLink (DSL or Fiber Optics)	17	Verizon (cell phone / wireless)
6	Charter Internet or Charter Cable (cable)	18	Xfinity Internet or Xfinity Cable (cable)
7	Clear.com (fixed wireless)	19	Unspecified / Unknown name but respondent says "Local **phone** company"
8	Clearwire (fixed wireless)	20	Unspecified / Unknown name but respondent says "Local **cable** company"
9	Comcast Internet or Comcast Cable (cable)	21	Unspecified / Unknown name - Cell phone or wireless provider
10	DirecTV (satellite)	22	Unspecified / Unknown name - Satellite
11	Dish (satellite)	98	Other (ENTER VERBATIM _____)
12	Earthlink (dial-up)	99	DON'T KNOW / REFUSED

A3b. **[ASK IF A3a= 5, 14, or 19]** Is your **[INSERT A3a RESPONSE]** Internet DSL, or Fiber Optic?

1. DSL **[CODE A3=2]**
2. Fiber Optic / FiOS **[CODE A3=4]**
9. DON'T KNOW / REFUSED

IF:	THEN:	VALUE LABEL:	STATUS:
A3A = ANY OF 1, 3, 12, 16	A3=1	Dial-up	Status = 3
A3B=1 OR A3B=9	A3=2	DSL	Status = 4
A3A = ANY OF 4, 6, 9, 18, 20	A3=3	Cable	Status = 4
A3B=2	A3=4	Fiber Optics	Status = 4
A3A = ANY OF 10, 11, 15, 22	A3=5	Satellite	Status = 4
A3A = ANY OF 2, 17, 21	A3=6	Mobile / Cellular	Status = 4
A3A = ANY OF 7, 8, 13	A3=9	Fixed Wireless	Status = 4
A3A = 98	A3=7	Other specified	Status = 4
A3A = 99	A3 = 99	Don't know	Status = 4

IN SUMMARY:

IF (A1=2) STATUS=1.
IF (A2A=2) STATUS=2.
IF (A3=1) STATUS=3.
IF (A3 ≥ 2 & A3 ≤ 6) STATUS=4.
IF (A3A IS NOT CODE 1) STATUS=4.

Non-Adopter Questions [ASK IF STATUS = 1, 2, or 3]

1 – Non user / 2 – User, not at home / 3 – User, dial-up /

NON1. **[ASK IF STATUS=1]** Have you ever at some point used the Internet but have since stopped for some reason?

1. NEVER USED THE INTERNET
2. USED THE INTERNET BUT STOPPED
9. DON'T KNOW / REFUSED

NON1A. **[ASK IF: NON1=2 OR STATUS = 2]** Did you ever at some point have the Internet at home, but no longer do?

1. NEVER HAD ACCESS TO THE INTERNET AT HOME
2. HAD ACCESS AT HOME AND NO LONGER DO
3. **STILL HAVE ACCESS AT HOME BUT DON'T USE IT**
9. DON'T KNOW / REFUSED

NON1B. **[ASK IF NON1A=2 OR NON1A=3]** Why do you no longer use (or have) the Internet at home? **[OPEN END]**

INTERVIEWER DOES NOT SEE THESE RESPONSES

1 TOO EXPENSIVE / CANNOT AFFORD IT
2 NOT AVAILABLE IN OUR AREA
3 SOMEONE ELSE USES IT, BUT NOT ME
4 NO COMPUTER / BROKEN COMPUTER
5 JUST DON'T NEED IT / SEE ANY REASON FOR IT
6 JUST MOVED
7 TOO SLOW
10 OTHER

NON2: **[ASK IF STATUS=1]** For each of the following statements, please tell me if it is a reason as to why you do not use the Internet. Please use a 5-point scale where "1" means it is "not at all a reason" and "5" means "a major reason for not using the Internet".

[ASK IF STATUS=2 OR STATUS=3] For each of the following statements, please tell me if it is a reason that you do not have high-speed Internet access in your home? Please use a 5-point scale where "1" means it is "not at all a reason" and "5" means "a major reason for not having high-speed internet in your home".
[RANDOMIZE A – J]

1. Not at all a reason
2.
3.
4.
5. A major reason
9. DON'T KNOW / REFUSED

A. Monthly cost is too expensive
B. I am not comfortable using a computer
C. I am worried about all the bad things that could happen if I use the Internet
D. The activation and installation fee to get service is too much
E. There is nothing on the Internet I want to see or use
F. It is not available where I live
G. I can access the Internet all I want at work
H. I can access the Internet all I want at a public location
I. I have all the access I need through my cell phone or wireless device
J. I can access the Internet all I want at a friend or family member's home

NON2.1 **[ASK IF NON2F >2 AND IF NON2F<9]** If high-speed internet were available where you live, would you be likely or unlikely to use it? **[INTERVIEWER PROBE:** "Would that be very or somewhat likely/unlikely"**]**

1. VERY UNLIKELY
2. SOMEWHAT UNLIKELY
3. NEITHER
4. SOMEWHAT LIKELY
5. VERY LIKELY
8. DON'T KNOW
9. REFUSED

NON2.1A **[ASK IF NON2.1=4 OR 5]** What types of things would you use the Internet for if it were available where you live?
[OPEN END] ***INTERVIEWER DOES NOT SEE THESE RESPONSES***

1 ***MOVIES / GAMING / ENTERTAINMENT***
2 ***BUY / SELL GOODS***
3 ***KEEP IN TOUCH WITH FAMILY / FRIENDS***
4 ***SOCIAL NETWORKING***
5 ***SCHOOL / EDUCATIONAL***
6 ***WORK FROM HOME***
7 ***GENERAL RESEARCH / INFORMATION GATHERING***
10 ***OTHER***

NON3: **[ASK IF STATUS=1 OR STATUS=2 OR STATUS=3]** How much do you think the monthly cost for ***high speed Internet*** access is in your area? **[OPEN END]**

[**IF NEEDED:** High speed Internet is any Internet connection that is not dial-up. It includes DSL, Cable Internet or Fiber Optic]

$____ / Month
999. DON'T KNOW / REFUSED

NON3A. **[IF NON3=999]** Do you think the monthly cost for ***high speed Internet*** access in your area is…**READ LIST**

1. $10-$20/month
2. $21-$30/month
3. $31-$40/month
4. $41-$50/month
5. $51-$60/month
6. $61-$70/month
7. $71-$80/month
8. $81-$90/month
9. $91-$100/month
10. Over $100/month
99. DON'T KNOW / REFUSED

NON4. **[ASK IF STATUS=1 OF STATUS=2 OR STATUS=3]** What do you think is a reasonable monthly cost for ***high speed Internet*** in your area?

$____ / Month
999 DON'T KNOW / REFUSED

NON4A. **[ASK IF NON4=999]** Would a reasonable monthly cost for ***high speed Internet*** in your area be… **READ LIST**

1. $10-$20/month
2. $21-$30/month
3. $31-$40/month
4. $41-$50/month
5. $51-$60/month
6. $61-$70/month
7. $71-$80/month
8. $81-$90/month
9. $91-$100/month
10. Over $100/month
99. DON'T KNOW / REFUSED

NON5. **[ASK IF NON1 = 1]** Would you be interested in starting to use the Internet?

[PROBE: Would that be very or somewhat [INTERESTED / NOT INTERESTED]

[ASK IF NON1A = 2] Would you be interested in getting Internet access at home again?

[PROBE: Would that be very or somewhat [INTERESTED / NOT INTERESTED]

1. Very interested
2. Somewhat interested
3. Somewhat uninterested
4. Very uninterested
9. DON'T KNOW / REFUSED

NON6. **[ASK IF NON5= 1 OR NON5=2]** Do you feel that you know enough about computers and technology to be able to set it up on your own, or would you need someone to help you?

1. KNOW ENOUGH TO DO IT ON MY OWN
2. WOULD NEED SOMEONE TO HELP ME
3. WOULD NOT WANT TO START USING THE INTERNET
9. DON'T KNOW / REFUSED

Internet User Questions

U1A. **[ASK IF STATUS=2 OR STATUS=3 OR STATUS=4]** When was the last time you used the internet?
[READ IF NECESSARY, STOP WHEN RESPONDENT ANSWERS]

1. Today
2. In the past week but not today
3. In the past month but not this week
4. Within the past three months but not in the past 30 days
5. Four to six months ago
6. Seven months to one year ago
7. It has been over a year
9. DON'T KNOW / REFUSED

U1B. **[IF U1 < 4]** In a given month, would you say that you use the Internet…
[READ LIST, STOP WHEN RESPONDENT ANSWERS]

1. Daily
2. 5-6 days a week
3. 3-4 days a week
4. 1-2 days a week
5. 2-3 days a month
6. One day a month or less
9. DON'T KNOW / REFUSED

U3. **[ASK IF STATUS=2 OR STATUS=3 OR STATUS=4]** Next, I'm going to read a list of things that people may use the Internet for. Please tell me whether this is something that **you** have never done, done in the past 30 days, or done but not recently. **[RANDOMIZE A – T]**

[IF RESPONDENT IS UNSURE BECAUSE SOMEONE IN THEIR HOUSEHOLD DOES AN ACTIVITY AND THE RESPONDENT DOESN'T, SPECIFY THAT WE ARE ASKING ABOUT "YOUR" SPECIFIC USE]

1 NEVER DONE
2 DONE BUT NOT RECENTLY
3 DONE IN THE PAST 30 DAYS
4 DON'T KNOW / REFUSED

A To buy or sell goods or services
B For activities relating to my current job
C For educational or training purposes such as doing homework or taking a class
D For entertainment such as TV, videos or gaming
E To find local businesses or events
F To get healthcare or medical information
G To get information on schools, colleges, or universities
H To look for a job
I For online banking and/or to pay bills such as cell phone, cable, or power bills
J To read or watch news
K To research prices or product information
L For social networking such as blogs, Facebook, or Twitter
M To obtain information from a city, county, state, or federal government website
N To search for information on the environment and/or monitor energy use in my home
O To control heating, cooling, or other energy systems in your home
P Check email
Q To get public safety information such as road conditions, closures, etc
R To download or stream music or listen to online radio
S To read sports news or scores
T To read stock market and related financial news

[SHOW ITEMS THAT HAVE BEEN DONE IN THE PAST 30 DAYS; IF ONLY ONE SELECTED FOR PAST 30 DAYS, SKIP U3AA]

U3AA **[ASK IF STATUS=4) AND ANY U3A to U3T=3]** a. Which of these do you do most often with your high-speed internet? **[SELECT ONE ONLY]** b. Which do you do second most often?

01 To buy or sell goods or services
02 For activities relating to my current job
03 For educational or training purposes such as doing homework or taking a class
04 For entertainment such as TV, videos or gaming
06 To find local businesses or events
07 To get healthcare or medical information
08 To get information on schools, colleges, or universities
09 To look for a job
10 For online banking and/or to pay bills such as cell phone, cable, or power
11 To read or watch news
12 To research prices or product information
13 For social networking such as blogs, Facebook, or Twitter
14 To obtain information from a city, county, state, or federal government website
16 To search for information on the environment and/or monitor energy use in my home
18 To control heating, cooling, or other energy systems in your home
19 Check email
20 To get public safety information such as road conditions, closures, etc
21 To download or stream music or listen to online radio
22 To read sports news or scores
23 To read stock market and related financial news
99 DON'T KNOW / REFUSED

U4. **[ASK IF STATUS=2 OR STATUS=3 OR STATUS=4]** Do you use the Internet at your job?

1. YES
2. NO
3. UNEMPLOYED
4. RETIRED
9. DON'T KNOW / REFUSED

U5. **[ASK IF: U4 = 1]** How often, if ever, do you work from a remote location or telecommute using the Internet, would that be…[READ LIST IF NECESSARY: STOP WHEN RESPONDENT ANSWERS]

1. Everyday
2. 3 to 4 times per week
3. 1 to 2 times per week
4. A few times per month
5. A few times per year
6. Never
9. DON'T KNOW / REFUSED

U6. **[ASK IF STATUS=3 OR STATUS=4]** The next set of questions is regarding your satisfaction with your Internet access at home. Please rate your satisfaction with the following attributes on a 5-point scale with 1 being "Not at all satisfied" and 5 being "Very satisfied". How satisfied are you with…

1. Not at all satisfied
2.
3.
4.
5. Very satisfied
9. DON'T KNOW / REFUSED

A. Your connection speed
B. The cost of your service
C. Ease of use
D. The reliability of your connection

U7. Using the same 5-point scale, how satisfied are you with your Internet service overall?

U9. **[ASK IF STATUS=4]** What is the monthly cost for ***high speed Internet*** access is in your home?
[IF NECESSARY READ: "Your best estimate is fine."]
$____/ Month
999. DON'T KNOW / REFUSED

U9A **[IF U9=999]** Is the monthly cost for ***high speed Internet*** access in your home…

1. $10-$20/month
2. $21-$30/month
3. $31-$40/month
4. $41-$50/month
5. $51-$60/month
6. $61-$70/month
7. $71-$80/month
8. $81-$90/month
9. $91-$100/month
10. Over $100/month
98. DON'T KNOW
99. REFUSED

U10. **[ASK IF STATUS=4]** What do you think is a reasonable monthly cost for ***high speed Internet*** in your area?
$____/ Month
999. DON'T KNOW / REFUSED

U10A. **[IF U10=999]** Would a reasonable monthly cost for ***high speed Internet*** in your area be…

1. $10-$20/month
2. $21-$30/month
3. $31-$40/month
4. $41-$50/month
5. $51-$60/month
6. $61-$70/month
7. $71-$80/month
8. $81-$90/month
9. $91-$100/month
10. Over $100/month
98. DON'T KNOW
99. REFUSED

U11A. Which of the following best describes your current Internet speed at home?

1 You subscribe to the lowest priced, slowest speed package
2 You subscribe to a middle of the road speed package
3 The package you subscribe to is one of the fastest speeds available through your provider
4 Don't know

Mobile Access **(note: in these questions, cell phone is the same thing as smart phone or mobile phone)**

MA1. **[ASKIF: CELL PHONE SAMPLE OR PHONE2= 1 OR AA1-G=1]** Do you use your cell phone to **access the Internet** daily? IF NO, do you use it to access the internet sometimes or not at all?

1. YES - DAILY
2. YES - SOMETIMES
3. NO, NOT AT ALL
9. DON'T KNOW / REFUSED

MA2. **[ASKIF: CELL PHONE SAMPLE OR PHONE2= 1 OR AA1-G=1]** Do you use your cell phone to **check email** daily? IF NO, do you use it to access the internet sometimes or not at all?

1. YES - DAILY
2. YES - SOMETIMES
3. NO, NOT AT ALL
9. DON'T KNOW / REFUSED

MA3. **[ASKIF: CELL PHONE SAMPLE OR PHONE2= 1 OR AA1-G=1]** Over the next 24 months, do you expect to access the Internet using your cell phone...?

1. A lot more often
2. A little more often
3. The same
4. A little less often
5. A lot less often

Perceptions of Technology [ASK ALL]

P1. On a 5-point scale, with "1" being "Not at all important" and "5" being "Very important" please tell me how important you think each of the following are.

1. Not at all Important
2.
3.
4.
5. Very Important
9. DON'T KNOW / REFUSED

C. That all households in Oregon have access to ***high-speed Internet*** such as DSL or Cable
D. That you, personally, have access to ***high-speed Internet*** such as DSL or Cable at home.

P2. On a 5-point scale, with "1" being "not at all concerned" and "5" being "Very concerned" please tell me how concerned you are about the following. **[RANDOMIZE A – D]**

1. Not at all concerned
2.
3.
4.
5. Very Concerned
9. DON'T KNOW / REFUSED

A. You and your family's privacy while on the Internet
D. The protection of your personal identity while on the Internet, such as having your social security number or bank
information stolen.

P3. Do you agree or disagree with each of the following statements? Would that be somewhat or strongly [AGREE / DISAGREE]? **[RANDOMIZE A – F]**

1. Strongly disagree
2. Somewhat disagree
3. Somewhat agree
4. Strongly Agree
9. DON'T KNOW / REFUSED

A. There is too much pornography and offensive material on the Internet
B. It is too easy for my personal information to be stolen online
C. The Internet is a valuable source for information and learning
D. It is important for children to learn how to use the Internet
E. The Internet is too dangerous for children
F. People can be more productive using the Internet
G. The Internet makes shopping and buying much more convenient

Demographics

DEMOINT The following questions are for classification purposes only. Your answers will remain strictly confidential and will only be used to help us group your answers.

D1. I am going to read a list of race categories. Please choose one or more races you consider yourself to be: **[SELECT ALL THAT APPLY] [READ LIST]**

1 White or Caucasian
2 Black or African American
3 American Indian or Alaska Native
4 Asian or Pacific Islander
5 Hispanic, Latino or Spanish origin
6 Other [ENTER VERBATIM:_____]

9 DON'T KNOW / REFUSED

D2. Including yourself, how many people live in your household?

(IF NEEDED: How many people live and sleep in your house most of the time, including you?)

___ ENTER RESPONSE [MUST BE AT LEAST 1] (RANGE 1-15)
15 15 OR MORE
99 DON'T KNOW / REFUSED

D3. **[IF D2 > 1]** How many children under the age of 18 live in your household?

___ ENTER RESPONSE

0 NO ONE UNDER 18
99 DON'T KNOW / REFUSED

D4. What is the highest grade level you have completed?

1. Some high school
2. High school diploma
3. Some college or an AA degree
4. Bachelor's degree
5. Post-graduate work
6. Post-graduate degree
9. DON'T KNOW / REFUSED

D5. What is your current employment status?

1. Employed full-time
2. Employed part-time
3. Student and not employed
4. Student and employed
5. Retired
6. Not employed, not actively looking for work
7. Not employed, actively looking for work
8. Self employed
9. Home maker
10. Disabled and unable to work
98. OTHER [ENTER VERBATIM: _____]
99. DON'T KNOW / REFUSED

D6. What best describes your home?
1 A single-family home, detached from other buildings
2 A townhouse or duplex
3 An apartment or condominium
4 A mobile home
5 Dorm
6 Retirement home
8 Or something else? [ENTER VERBATIM: _____]
9 DON'T KNOW / REFUSED

D7. Do you currently rent or own your home?
1. Rent
2. Own
9. DON'T KNOW / REFUSED

D8. Do you have any of the following long-lasting conditions?
1. YES
2. NO
9. DON'T KNOW / REFUSED

A Blindness or a severe vision impairment even with glasses or contact lenses
B. Deafness or a severe hearing impairment even with a hearing aid?
C. A physical condition that substantially limits your ability to walk or climb stairs?
D. A condition that makes it difficult to type on an ordinary typewriter or traditional computer keyboard?

D8a. **[ASKIF: D8 = 1]** Does your disability or illness make it harder for you to use the Internet or does it make no difference?

1. YES, IT MAKES IT HARDER
2. NO, IT DOESN'T MAKE A DIFFERENCE
9. DON'T KNOW / REFUSED

D9A. Finally, I'm going to read a list of income ranges and when I come to the category that best represents the total combined income before taxes of all members of this household during 2013, please let me know. Was your household's income for 2013 above or below $30,000?

1. ABOVE $30,000
2. BELOW $30,000
9. DON'T KNOW / REFUSED

D9B. **[IF D9A=2]** Was your household income…
1. Under $10,000
2. $10,000 to under $15,000
3. $15,000 to under $20,000
4. $20,000 to under $25,000
5. $25,000 to under $30,000
9. DON'T KNOW / REFUSED

D9C. **[IF D9A=1]** Was your household income…
1. $30,000 to under $40,000
2. $40,000 to under $50,000
3. $50,000 to under $60,000
4. $60,000 to under $75,000
5. $75,000 to under $85,000
6. $85,000 to under $100,000
7. $100,000 to under $150,000
8. $150,000 or more
99. DON'T KNOW / REFUSED