



Technology Assessment of Tennessee Residential Consumers January 2008



Demographics of Tennessee Technology Adopters

Tennessee residents with:

	A cellular phone	A home computer	Home Internet service	Home dial-up service	Home broadband service	Voice over Internet Protocol (VoIP)
All Tennessee adults	76%	76%	70%	19%	50%	2%
Residents age 18-34	81%	86%	81%	22%	59%	4%
Residents age 65 or older	59%	47%	38%	11%	25%	0%
Married residents	83%	87%	80%	21%	58%	3%
Residents with children at home	83%	88%	82%	23%	59%	3%
Employed full-time or part-time	84%	88%	82%	23%	59%	4%
Disabled residents	53%	44%	37%	14%	23%	0%
College graduates	91%	93%	90%	17%	74%	6%
Household incomes less than \$25,000 per year	48%	45%	36%	19%	16%	0%

Significantly* higher than the state average:

Significantly* lower than the state average:

*(significance measured at a 95% confidence level)

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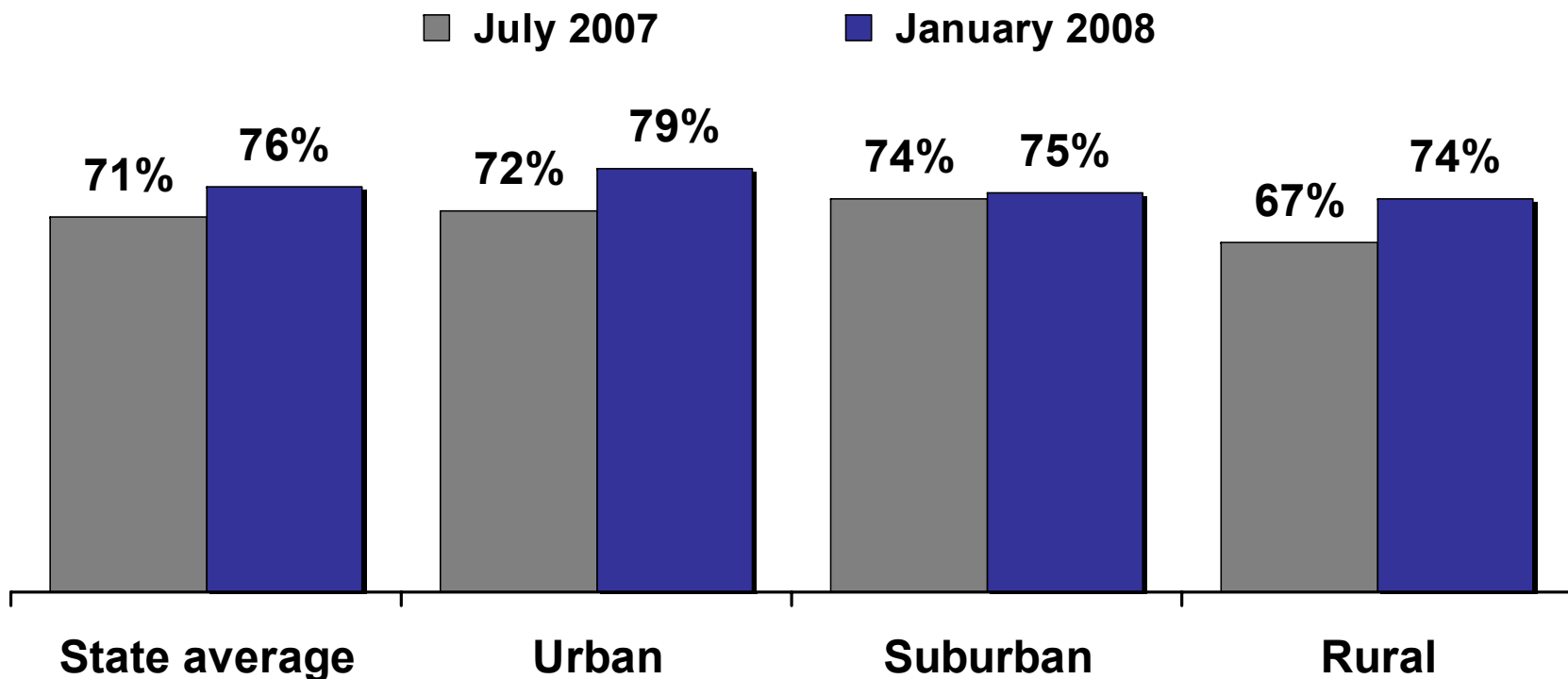


Computer and Internet Adoption



Trends in Computer Ownership by Urban-Rural Classification

Percent of Tennessee residents with a computer:



Q: Does your household have a computer?

(n = 1,106 TN residents)

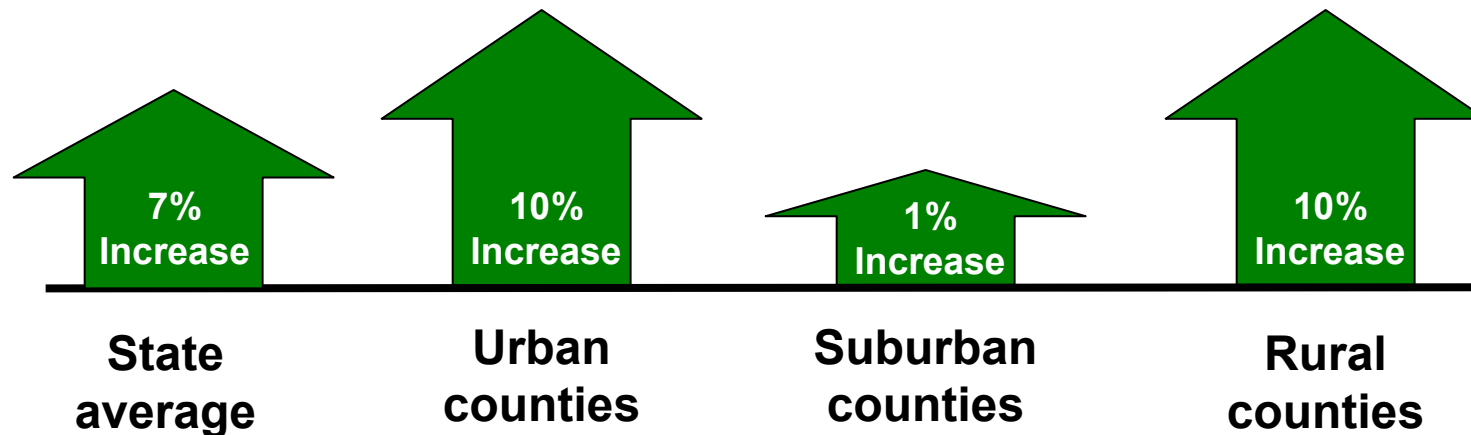
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Trends in Computer Ownership by Urban-Rural Classification

Percent change in computer ownership from July 2007 to January 2008:



Q: Does your household have a computer?

(n = 1,106 TN residents)

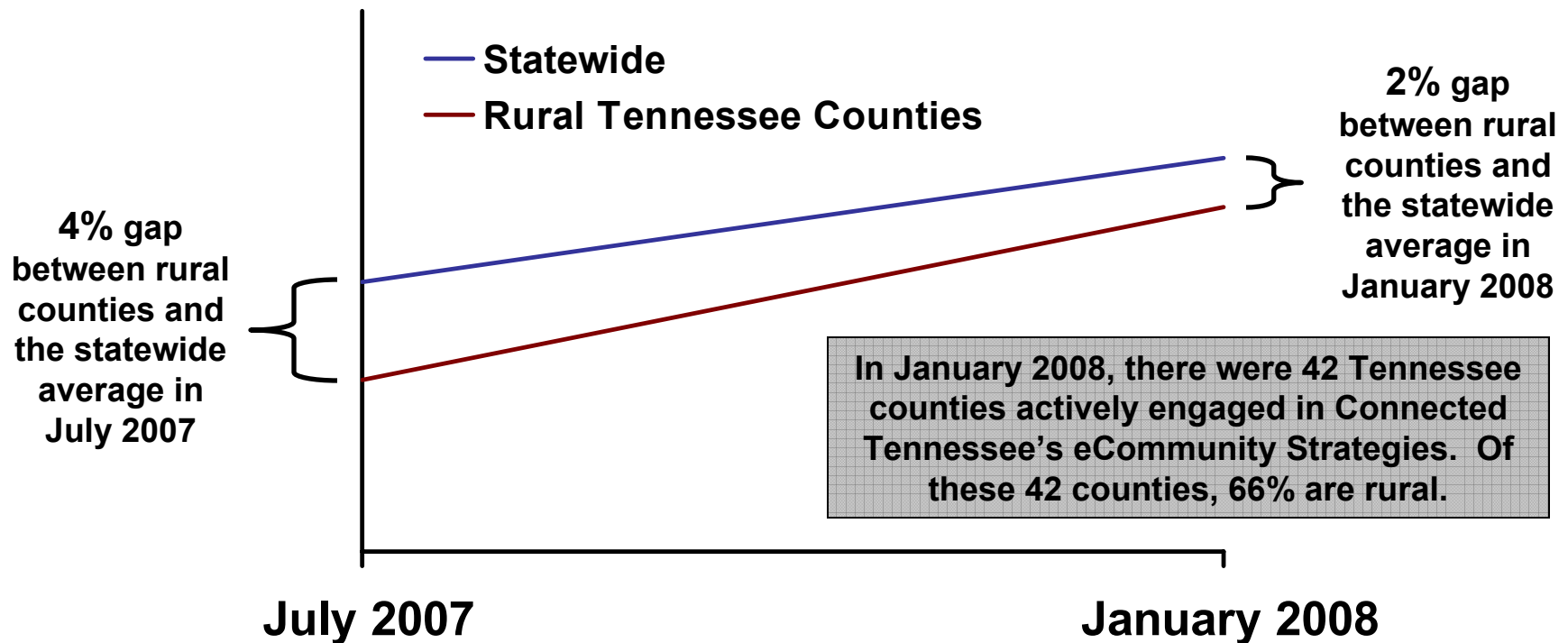
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Trends in Rural Computer Ownership

Percent of Tennessee residents who own a computer:



Q: Does your household have a computer?

(n = 1,106 TN residents)

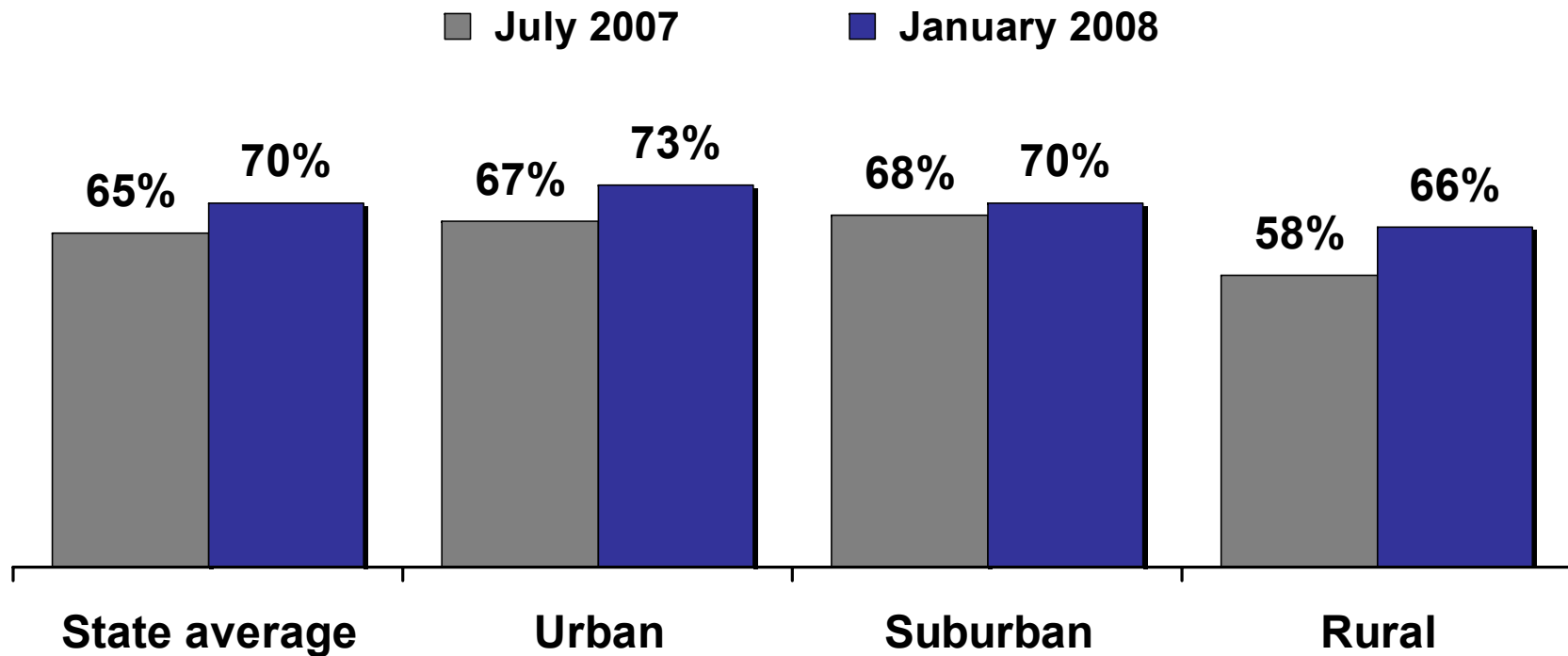
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Trends in Internet Adoption by Urban-Rural Classification

Percent of Tennessee residents with Internet service at home:



Q: Do you have an Internet connection at home?

(n = 1,106 TN residents)

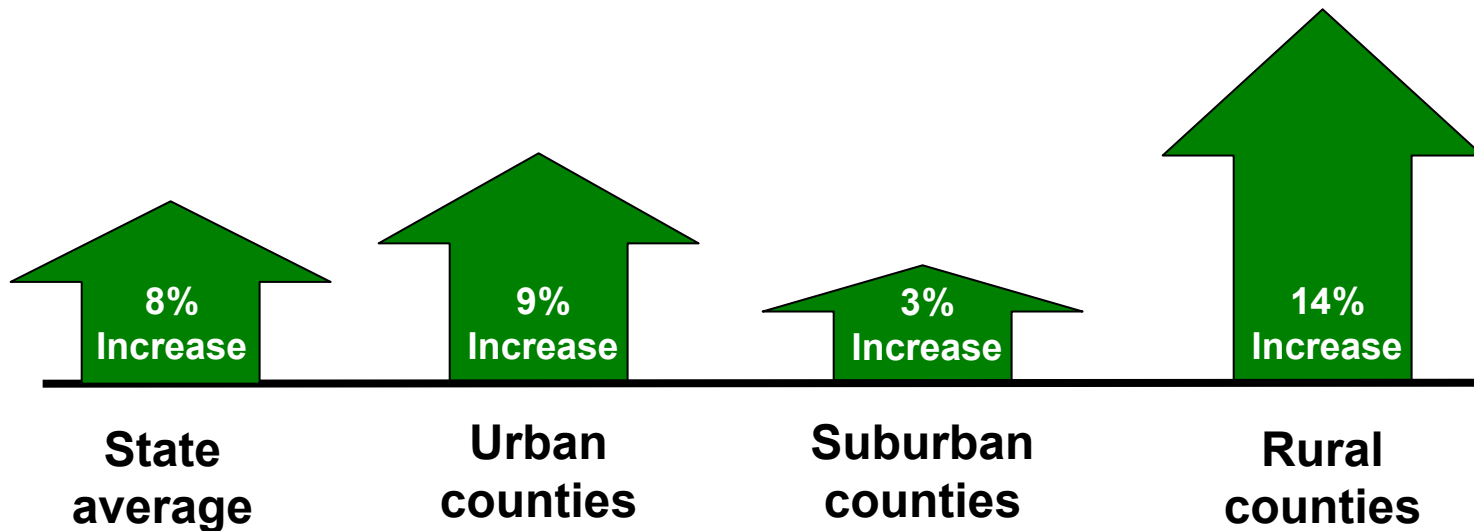
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Trends in Internet Adoption by Urban-Rural Classification

Percent change in Internet adoption from July 2007 to January 2008:



Q: Do you have an Internet connection at home?

(n = 1,106 TN residents)

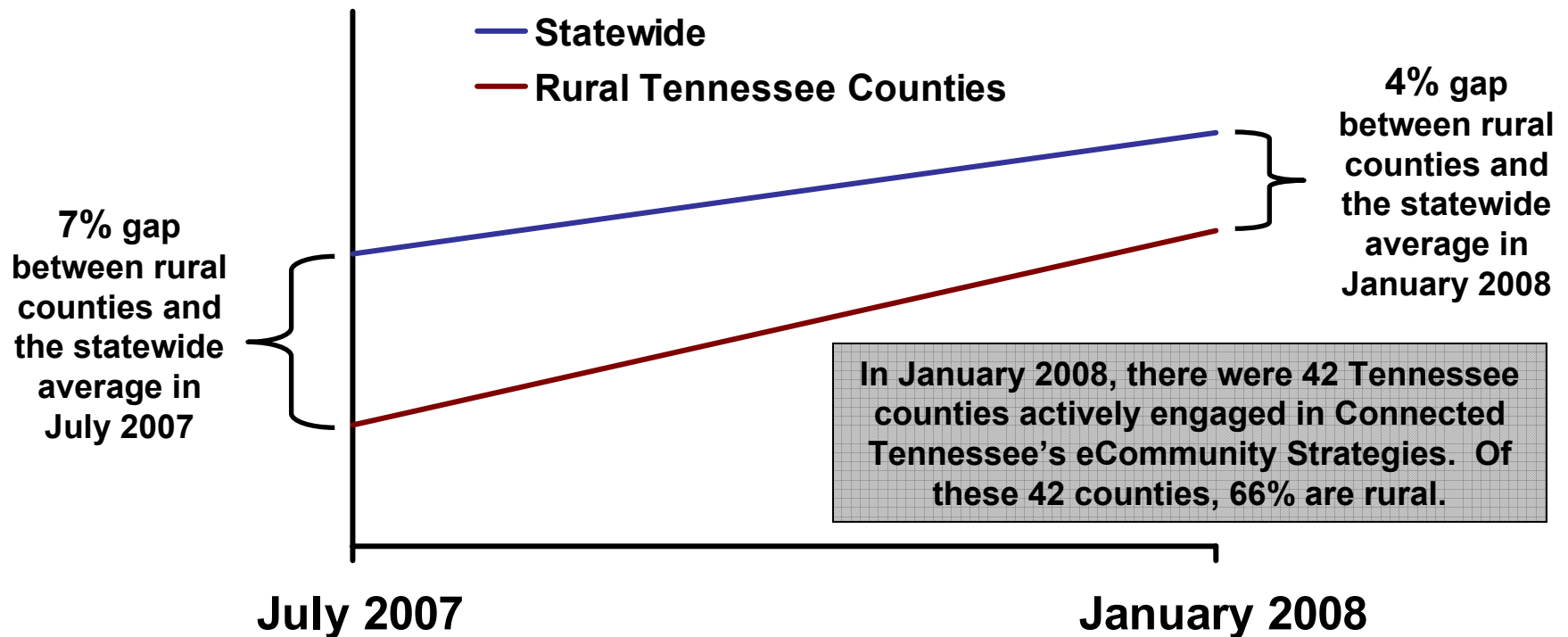
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Trends in Rural Internet Adoption

Percent of Tennessee residents with Internet service at home:



Q: Do you have an Internet connection at home?

(n = 1,106 TN residents)

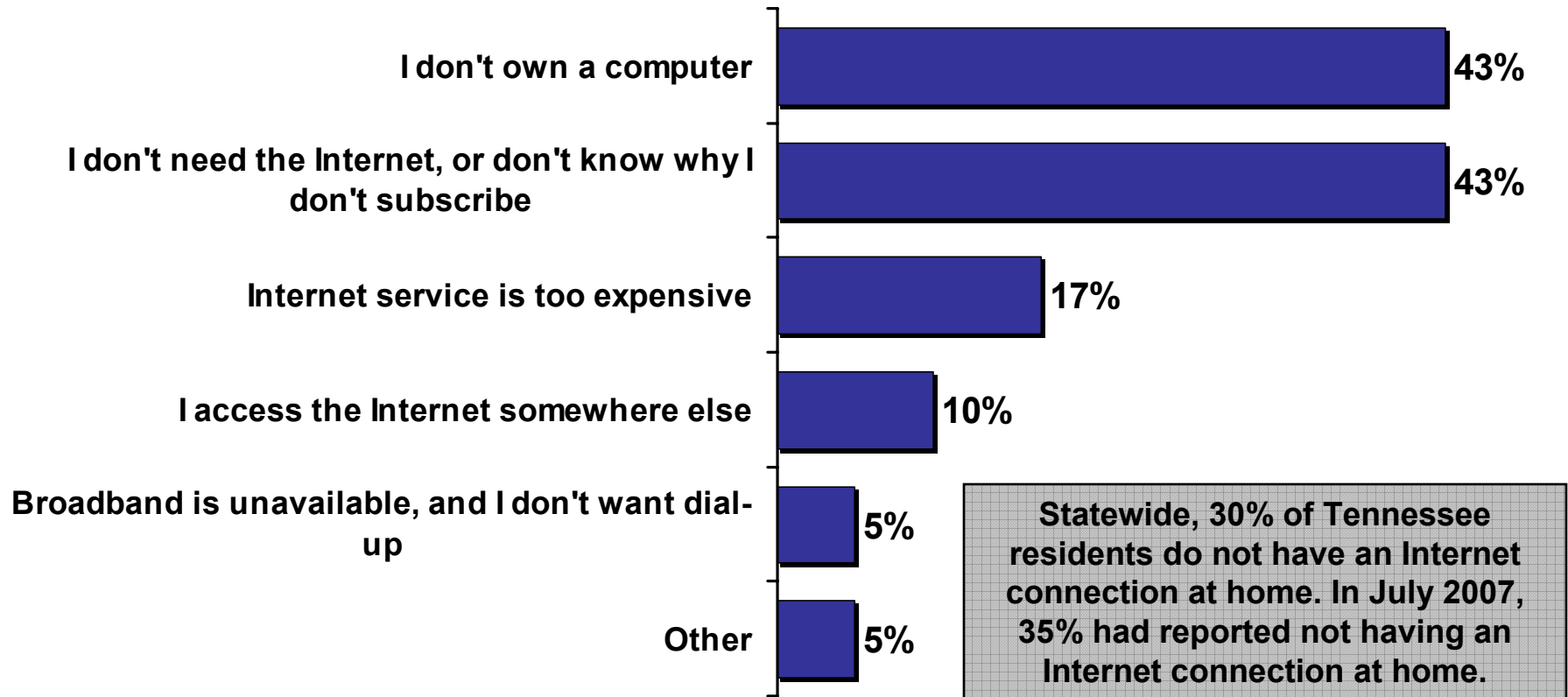
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Barriers to Internet Adoption

Percent of Tennessee residents with no Internet connection at home*:



Q: Why don't you subscribe to the Internet at home?
(n = 333 TN residents with no Internet service in their household)
*Percentages do not add up to 100% because individuals could give multiple responses.

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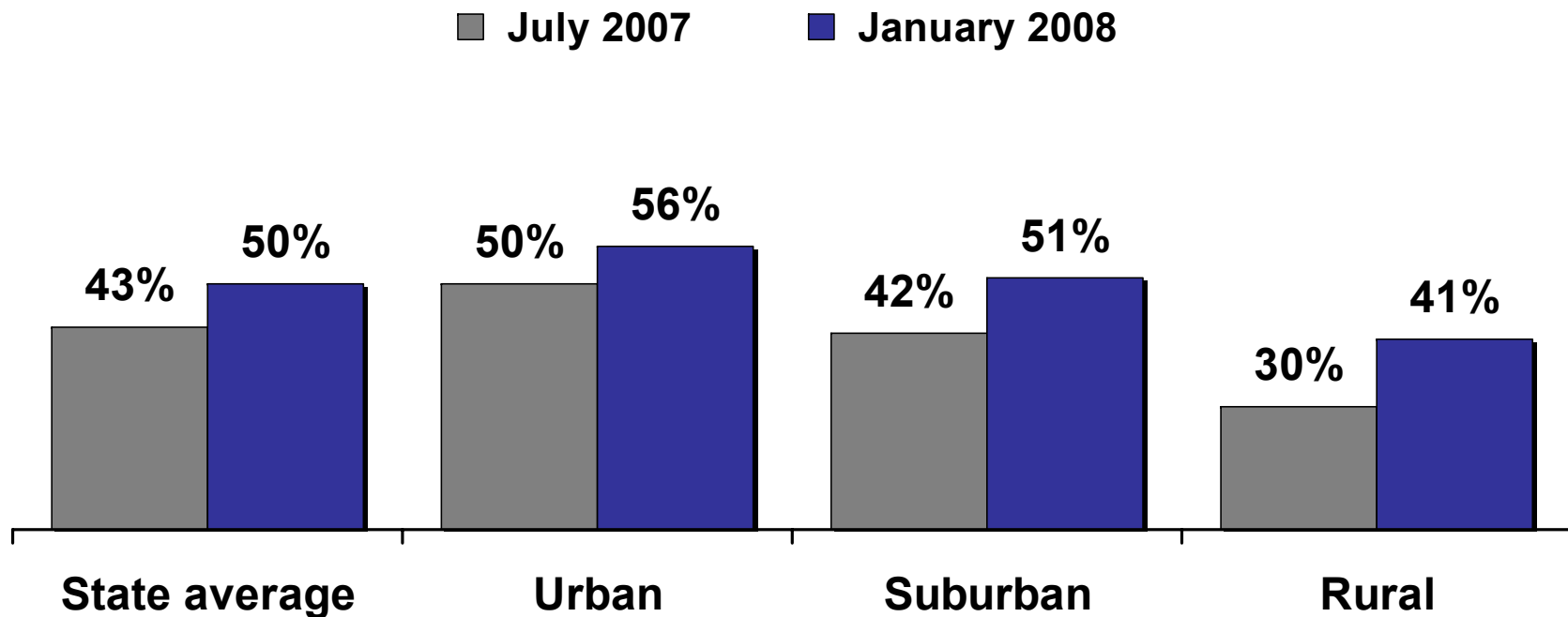


Broadband Adoption and Usage



Trends in Broadband Adoption by Urban-Rural Classification

Percent of Tennessee residents with broadband service at home:



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

(n = 1,106 TN residents)

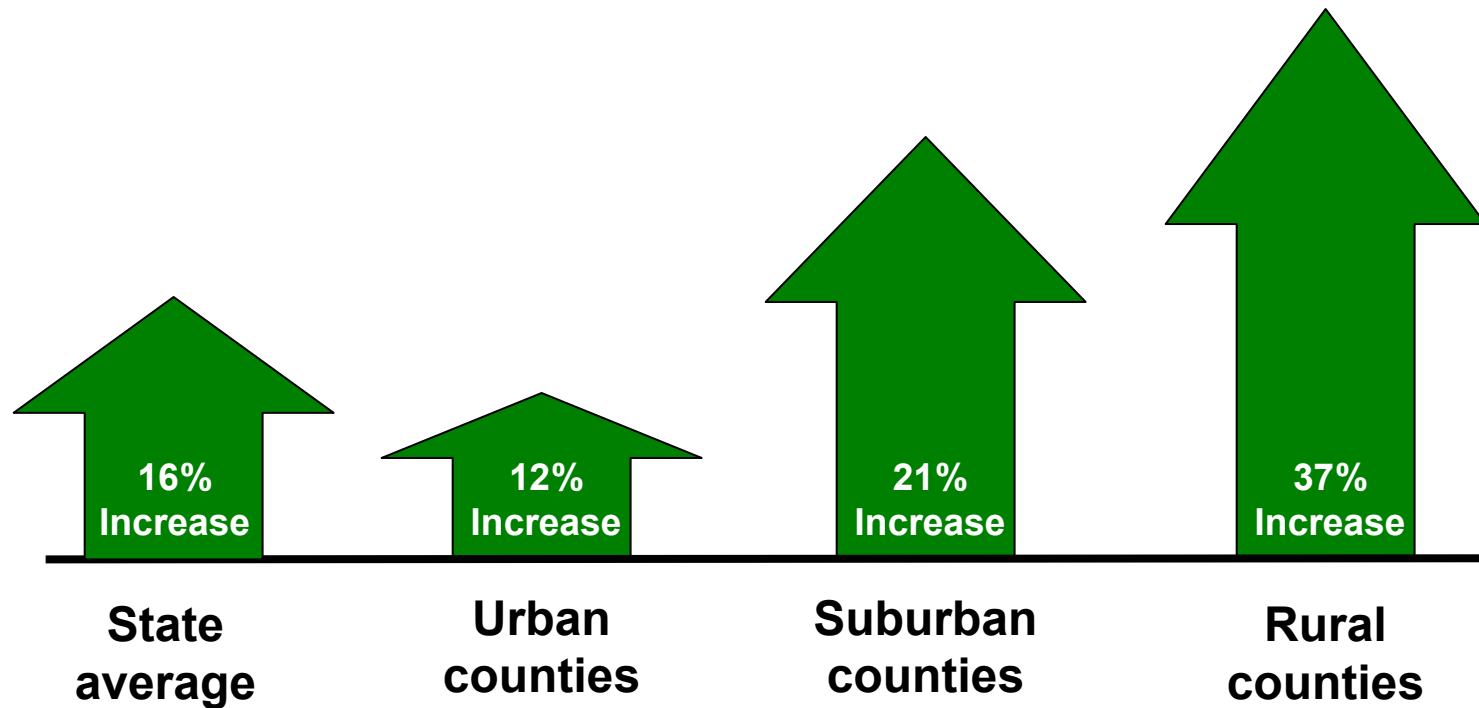
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Trends in Broadband Adoption by Urban-Rural Classification

Percent change in broadband adoption from July 2007 to January 2008:



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

(n = 1,106 TN residents)

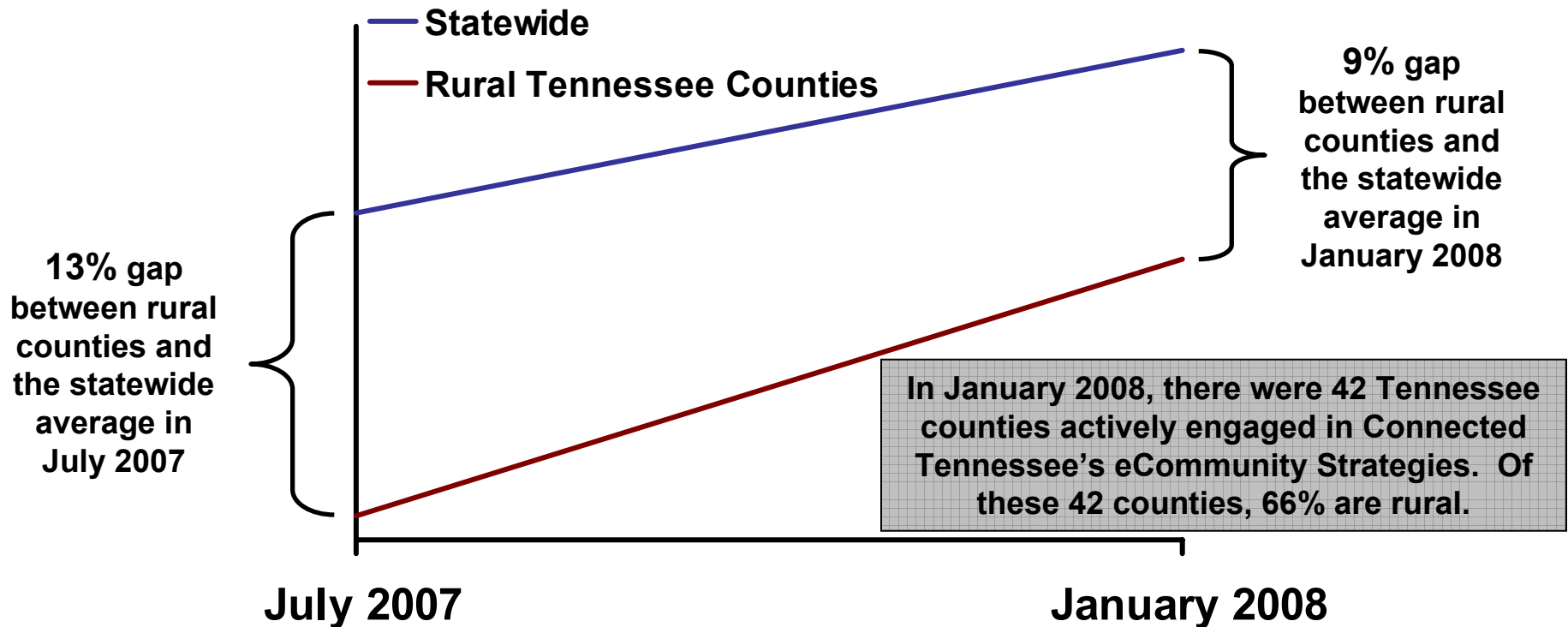
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Trends in Rural Broadband Adoption

Percent of Tennessee residents with broadband service at home:



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

(n = 1,106 TN residents)

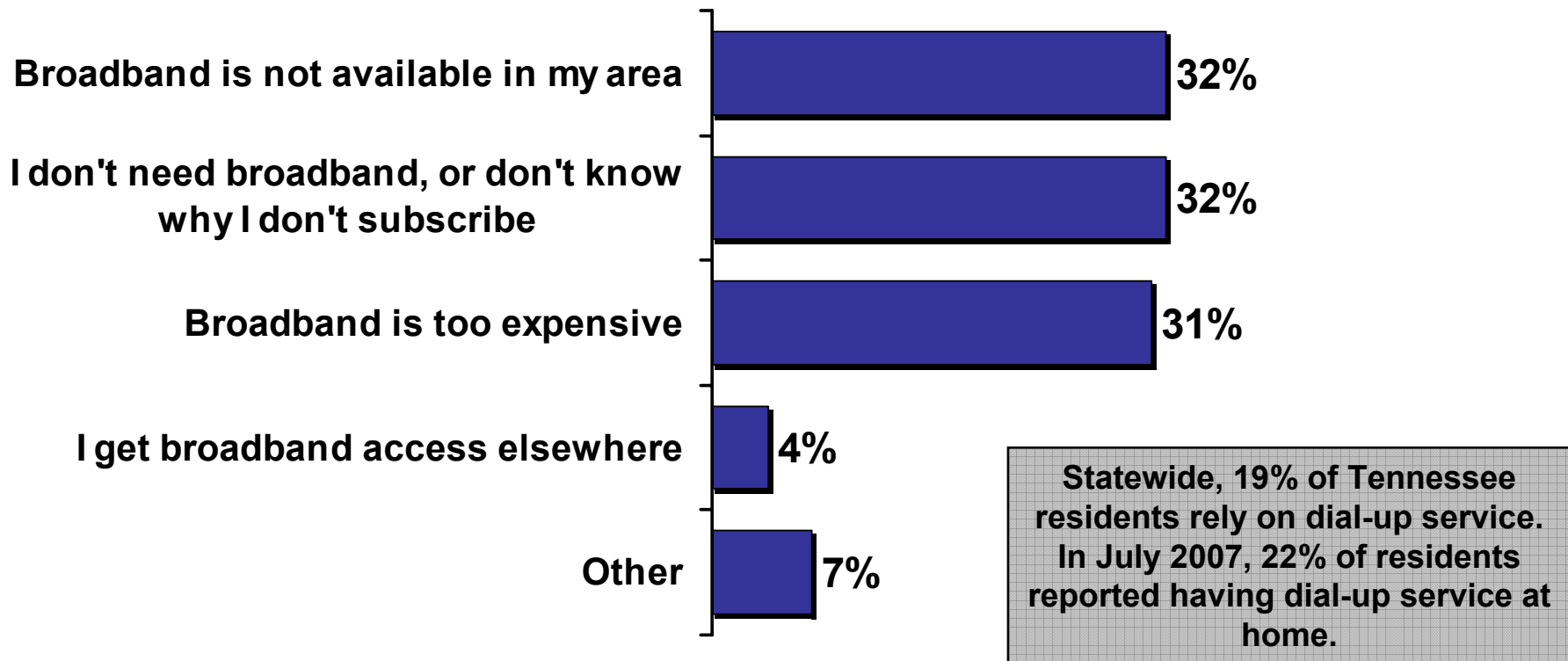
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Barriers to Broadband Adoption Among Dial-Up Users

Percent of Tennessee residents who rely exclusively on dial-up for their home Internet service*:



Q: Why don't you subscribe to broadband at home?
(n = 224 TN residents with dial-up service at home)
*Percentages do not add up to 100% because individuals could give multiple responses.

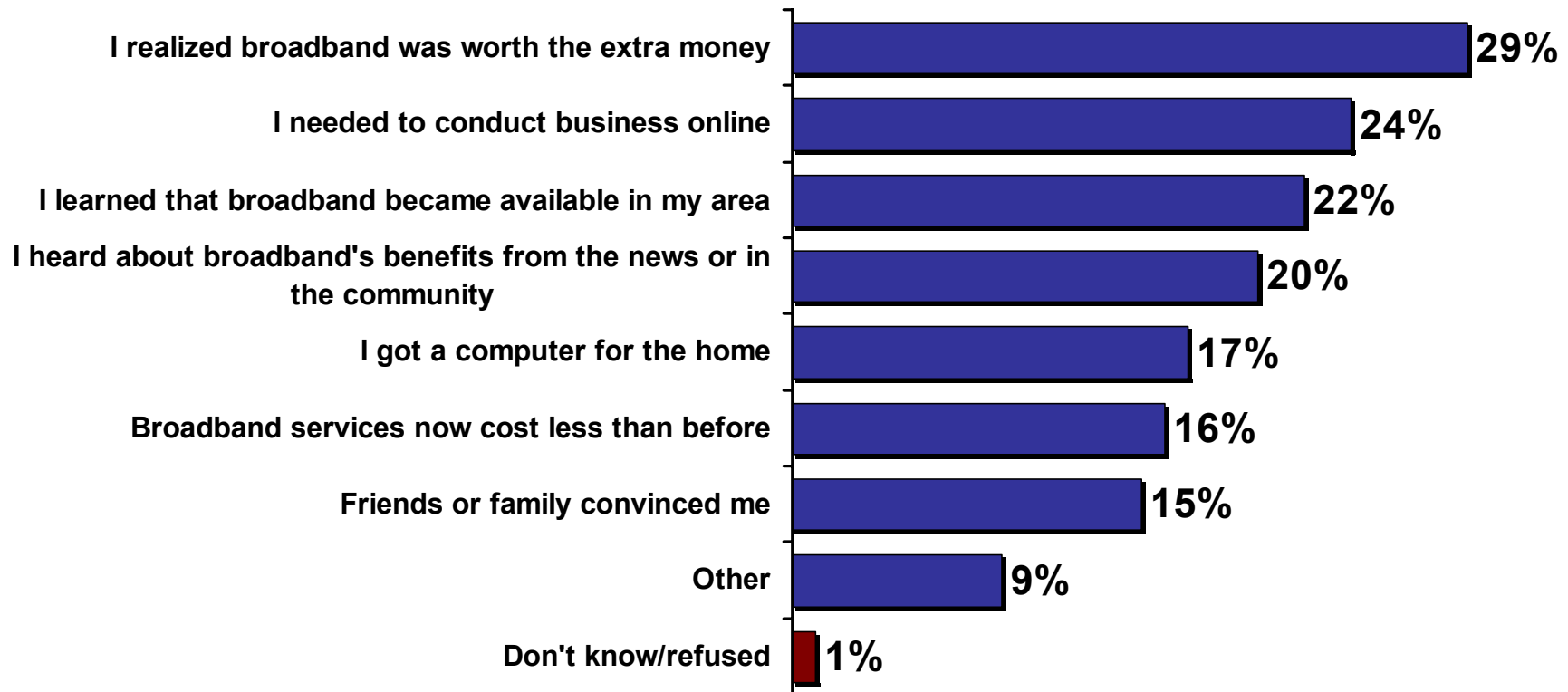
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Why Tennessee Residents Subscribe to Broadband

Percent of Tennessee residents with a broadband connection at home*:



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

(n = 549 TN residents with broadband service at home)

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

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Research Methodology



Methodology

- **Data were collected by telephone through live computer assisted interviews from a statewide random digit dial (RDD) sample of 1,106 households contacted between January 23 and February 1, 2008.**
 - This research was designed to update the state-level benchmarks that were established by the benchmark survey completed in July 2007.
- **The questionnaire screened to include only adults age 18 or older with quotas set by gender and age to insure adequate representation of all adults in the state.**
- **Weights were applied to correct for minor variations and insure that the sample matches the most recent U.S. Census estimates of the state's population by age and gender.**
- **Sampling margin of error:**
 - Statewide, full sample (n=1,106): $\pm 2.9\%$ at the 95% level of confidence.
- **National comparisons for Internet and broadband adoption rates are taken from surveys conducted by the Pew Internet and American Life Project in August 2007 and December 2007. This time period was used because it most accurately mirrors the dates Connected Tennessee's residential surveys were conducted; however, it should be noted that the national comparison period is slightly shorter than the Tennessee growth period. When the same six month growth in Tennessee is compared to national growth rates over a longer period (using data from similar surveys conducted by Pew in February 2007 and December 2007), Internet and broadband adoption still grew faster in Tennessee than the national average.**



Urban-Rural Classifications Defined

- **The U.S. Census Bureau uses an urban-rural classification based on Metropolitan Statistical Areas (MSAs), which are designated by the United States Office of Management and Budget to collect, tabulate and publish federal statistics.**
- **Metropolitan statistical areas contain a core urban area with a population of 50,000 or more. Each MSA also includes one or more counties that have a high degree of social and economic interaction with the urban core (further information on definitions for MSAs can be found at: www.census.gov/population/www/estimates/00-32997.pdf).**
- **When classifying urban, suburban and rural counties, we follow the Census Bureau definition whereby counties are categorized as “urban” if they contain the core city of an MSA. “Suburban” counties are MSA counties that do not contain a core city, and “rural” counties include all remaining counties that are not part of an MSA.**
- **Using these definitions, there are currently 10 Urban, 28 Suburban and 57 Rural counties in Tennessee.**



State Sample Profile (n=1,106)

Gender:		Any children under age 18 in household	42%
Male	48%	Average household size (# of persons)	2.9
Female	52%	Employment Status:	
Age:		Employed full-time or part-time	59%
18 to 34	30%	Retired	17%
35 to 44	19%	Homemaker not employed outside home	9%
45 to 54	19%	Student not working for wages	2%
55 to 64	15%	Unemployed, disability, other	11%
65 or older	17%	No answer/refused	2%
Mean age (years)	47	Educational Attainment:	
Median age (years)	44	Less than high school	12%
Race:		High school graduate	30%
White	83%	Some college	25%
Black	9%	College graduate or higher	30%
Any other	3%	No answer /refused	3%
Refused	5%	Household Income:	
Of Hispanic origin or descent	2%	Under \$25,000	21%
Marital Status:		\$25,000 to \$49,999	27%
Single, never married	11%	\$50,000 to \$74,999	15%
Married or living in partnership	68%	\$75,000 or higher	22%
Separated or divorced	11%	No answer/ refused	15%
Widowed	9%	Mean household income (\$000)	\$60.2
Refused to say	1%	Median household income (\$000)	\$45.5



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