

Broadband Survey

A Nationally Representative Multi-Mode Survey

Prepared by CR Survey Research Department
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INTRODUCTION

In June, 2021 Consumer Reports conducted a nationally representative multi-mode survey. The purpose of the survey was to assess Americans' access to high-speed internet service, and gauge their experiences and satisfaction with their broadband internet service. NORC at the University of Chicago administered the survey through its AmeriSpeak® Panel to a nationally representative sample of 2,565 adult U.S. residents.

HIGHLIGHTS

Type of Services Used to Access the Internet

- About **three out of four (77%) Americans say their household accesses the internet using a broadband service**—high speed internet through a fixed cable or connection.
 - A larger percentage of white, non-Hispanic Americans (79%) than Black, non-Hispanic Americans (70%) say their household accesses the internet through a broadband service.
 - Eight in 10 Americans who live in urban areas say their household accesses the internet using a broadband service, while the same is true for 70% and 69% of Americans who live in a suburban or rural area, respectively.
- Fifteen percent of American households only have access to the internet through their smartphone data plan and one in 20 use DSL or dial-up to access the internet. **Three percent of Americans say their household does not have access to the internet.**
 - A larger percentage of Black, non-Hispanic Americans (21%) than white, non-Hispanic (14%) or Hispanic (15%) Americans access the internet only through a smartphone data plan.

Reasons for NOT Having Broadband

- **Nearly a third of Americans (32%) who do not have broadband say the reason they do not have it is because it costs too much.**
- **A quarter of Americans who don't have broadband in their homes say it is because it is not available where they live.**

Post-COVID Internet Usage and Upgrades

- **Forty-three percent of Americans who have broadband service in their household say they are currently using internet more in their household now** compared to before the COVID-19 pandemic began.
- **Sixteen percent of Americans with broadband in their household say they had to upgrade their internet package to accommodate their household's needs** since the pandemic began in early March 2020.

- A **larger percentage of Hispanic (28%) and Black, non-Hispanic (22%)** Americans than white, non-Hispanic (12%) Americans report having to **upgrade their internet package** to accommodate their household's needs since the pandemic began in early March 2020.

It Pays to Negotiate

- Nearly **two-thirds (64%) of Americans** who have a broadband service in their household say they **have not tried to negotiate** with their internet service provider for a better price or better features in the past 12 months.
- Of those who tried to negotiate for a better price, 42% were successful in getting one and for those who bargained for better features, nearly half (49%) were successful.

Cost of Broadband

- Overall, the median amount paid by Americans with broadband service is **\$70 per month** (including taxes and fees.)
- Nearly a quarter of Americans (**24%**) who have a broadband service at their home say it's difficult (somewhat difficult, 21%; very difficult, 3%) **to afford their monthly broadband costs.**
 - A larger percentage of Black, non-Hispanic (32%) and Hispanic (33%) Americans than white, non-Hispanic Americans (21%) say it's 'somewhat' or 'very' difficult to afford their monthly internet costs.
- **Forty-three percent** of Americans who have broadband service in their household say they are **dissatisfied with the value they get for the money.**

Broadband Internet Service Ratings

- More than half of Americans with broadband internet service in their household say the SPEED (54%) and RELIABILITY (52%) of their home internet connection is 'excellent' or 'very good.'
- More than three out of four (**77%**) **Americans who have broadband service** in their household say they are **satisfied overall with their current internet service.**

Opinions about Municipal/Community Broadband

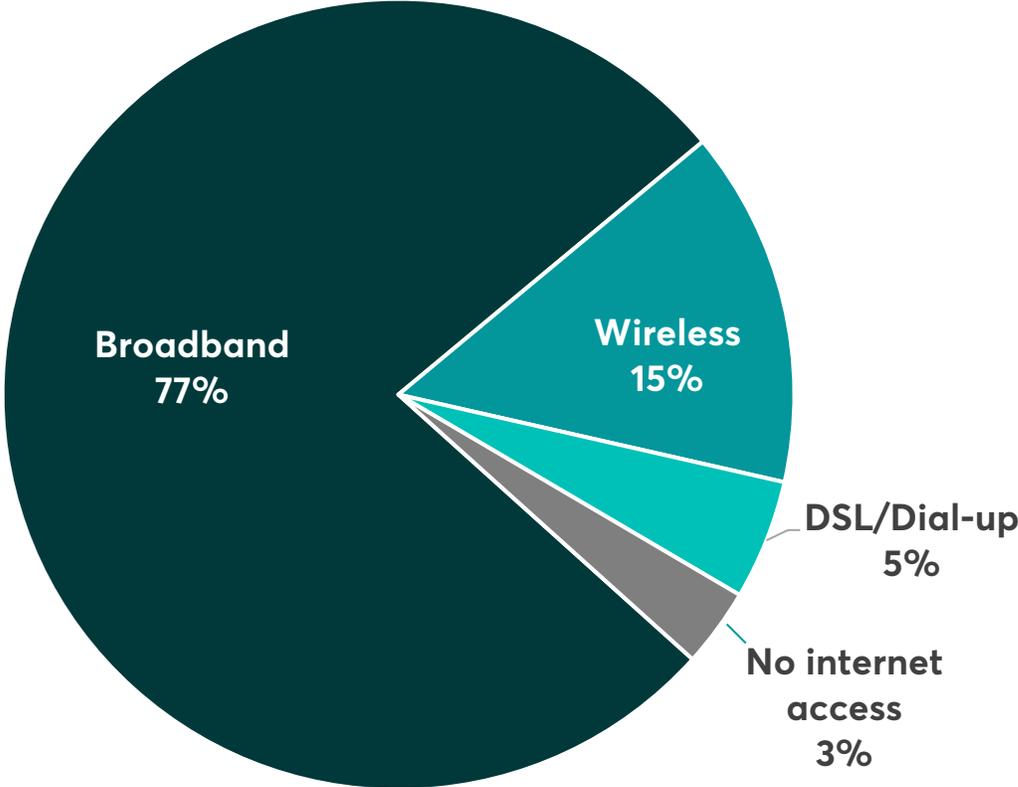
- **Three out of four Americans** feel that municipal/community broadband **should be allowed** because it would ensure that broadband access is treated like other vital infrastructure such as highways, bridges, water systems, and electrical grids, allowing all Americans to have equal access to it.
- A larger percentage of Democrats (85%) than Independents (74%) and Republicans (63%) say municipal/community broadband should be allowed.

ACCESSING THE INTERNET

Type of Services Used to Access the Internet

About three out of four (77%) Americans say their household accesses the internet using a broadband service—high speed internet through a fixed cable or connection. Fifteen percent of American households only have access to the internet through their smartphone data plan and one in 20 use DSL or dial-up to access the internet. Three percent of Americans say their household does not have access to the internet.

WHICH OF THE FOLLOWING SERVICES DOES YOUR HOUSEHOLD USE TO ACCESS THE INTERNET?



Base: All respondents

Reasons for NOT having Broadband

We asked Americans **who do not have broadband service** at home, the reasons why they don't have it.

32%

OF AMERICANS
WHO **DON'T HAVE BROADBAND SERVICE**
IN THEIR HOUSEHOLD

SAY THE REASON THEY DO NOT HAVE IT IS
BECAUSE...

IT COSTS TOO MUCH

25%

OF AMERICANS
WHO **DON'T HAVE BROADBAND SERVICE**
IN THEIR HOUSEHOLD

SAY THE REASON THEY DO NOT HAVE IT IS
BECAUSE...

IT IS NOT AVAILABLE WHERE THEY LIVE

16%

OF AMERICANS
WHO **DON'T HAVE BROADBAND SERVICE**
IN THEIR HOUSEHOLD

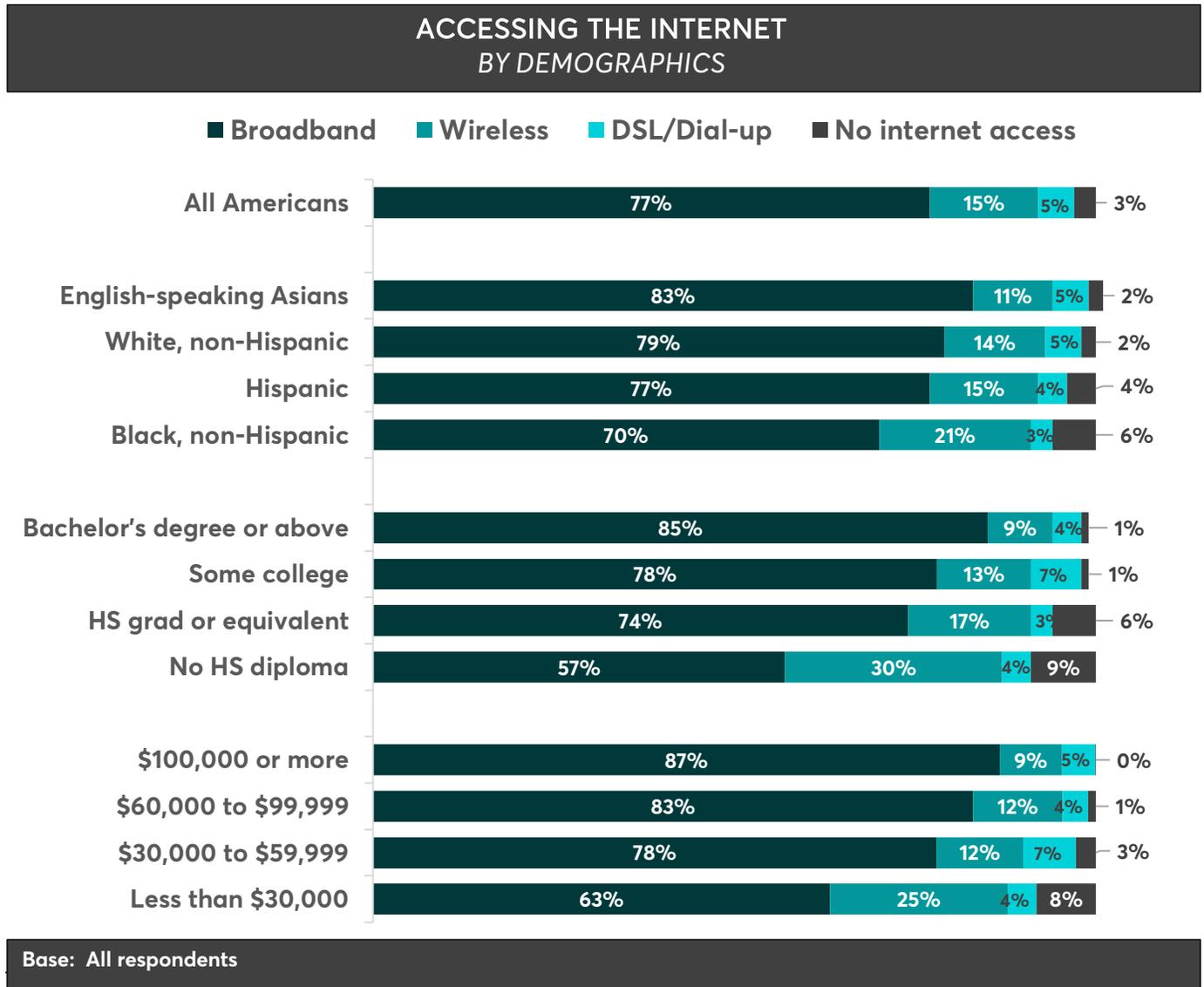
SAY THE REASON THEY DO NOT HAVE IT IS
BECAUSE...

THEY JUST DON'T WANT IT

Internet Access by Demographics

Income and education level play a key role when it comes to who has broadband access in their household. Those with lower levels of income and education are less likely to have broadband at home. Also, a larger percentage of white, non-Hispanic Americans (79%) than Black, non-Hispanic Americans (70%) say their household accesses the internet through a broadband service¹.

A larger percentage of Black, non-Hispanic Americans (21%) than white, non-Hispanic (14%) or Hispanic (15%) Americans access the internet only through a smartphone data plan².

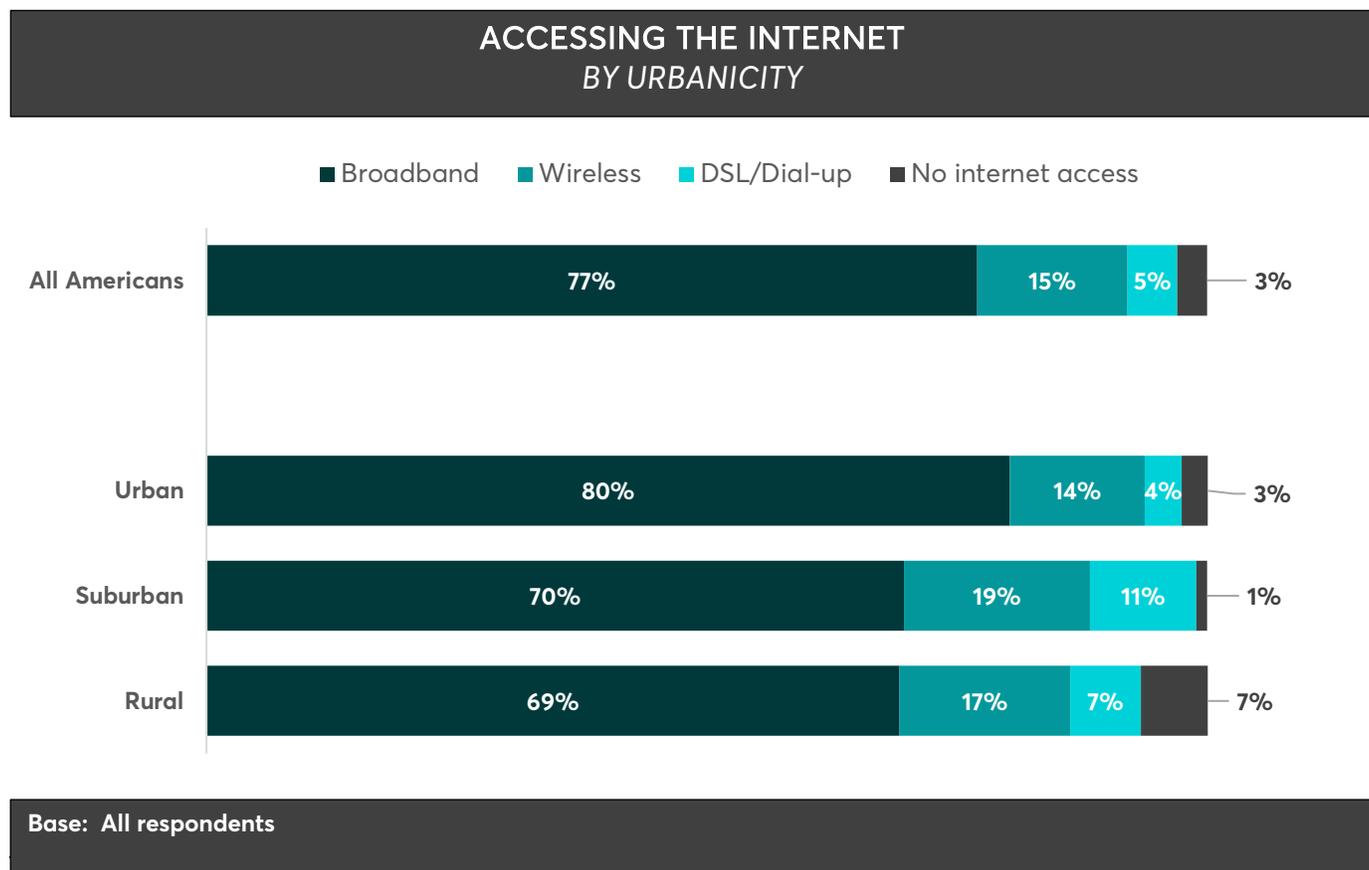


¹ These differences remain significant when controlling for age, gender, education level, household income, urbanicity, household size, and political party affiliation.

² These differences remain significant when controlling for age, gender, education level, household income, urbanicity, household size, and political party affiliation.

Internet Access by Urbanicity

Eight in 10 Americans who live in urban areas say their household accesses the internet using a broadband service, while the same is true for 70% and 69% of Americans who live in a suburban or rural area, respectively. About one in 10 (11%) suburban households use DSL or dial-up to access the internet, whereas 7% of rural households do. But, seven percent of those living in rural America say their household **does not have any access to the internet**.



Number of Broadband Providers Available

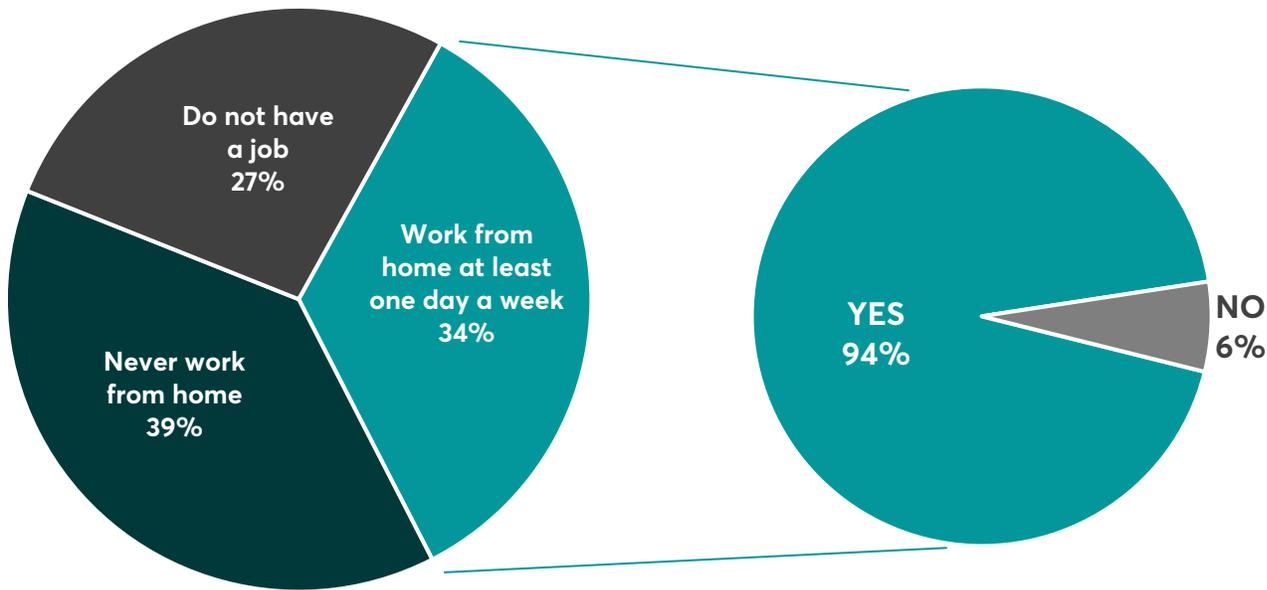
About a **quarter** (26%) of Americans who have broadband in their household say there was **only one broadband internet provider available** when they were choosing their household's internet service. Nearly two in 10 (19%) Americans were 'unsure' how many providers were available when they chose their broadband service.

However, the number of broadband providers varies by where you live. Excluding those who said they were unsure, we found Americans living in urban areas report a median of three broadband providers available to choose from when they were selecting their broadband service, whereas Americans living in rural or suburban areas report a median of two broadband provider options.

Working from Home

About a third (34%) of Americans who have a broadband service in their household say they work from home at least one day a week. Of those, nearly all (94%), say their work requires them to use the internet.

DO YOU CURRENTLY WORK FROM HOME? **DOES YOUR WORK FROM HOME REQUIRE YOU TO USE THE INTERNET?**



Base: Respondents who have broadband service in their household Base: Respondents who have broadband service in their household and work from home at least one day a week

POST-COVID INTERNET USAGE AND UPGRADES

Internet Usage After COVID-19 Pandemic

Forty-three percent of Americans who have broadband service in their household say they are currently using internet more in their household now compared to before the COVID-19 pandemic began in early March 2020. Just two percent say they are using it less now than before and about half (54%) are using it about the same.

43%

OF AMERICANS
WHO HAVE BROADBAND SERVICE
IN THEIR HOUSEHOLD

SAY THEY ARE USING THE INTERNET
MORE NOW THAN THEY DID PRIOR
TO THE START OF THE PANDEMIC

Americans with **higher education levels** are more likely than those with lower education levels to say they are **using the internet more now** than they did prior to the start of the pandemic.

A larger percentage of **English-speaking Asian Americans (67%)** than white, non-Hispanic (40%), Black, non-Hispanic (45%), and Hispanic (46%) Americans are **using the internet more now** than before the pandemic started.

54%

OF AMERICANS
WHO HAVE BROADBAND SERVICE
IN THEIR HOUSEHOLD

SAY THEY ARE USING THE INTERNET
ABOUT THE SAME NOW AS THEY DID
PRIOR TO THE START OF THE
PANDEMIC

2%

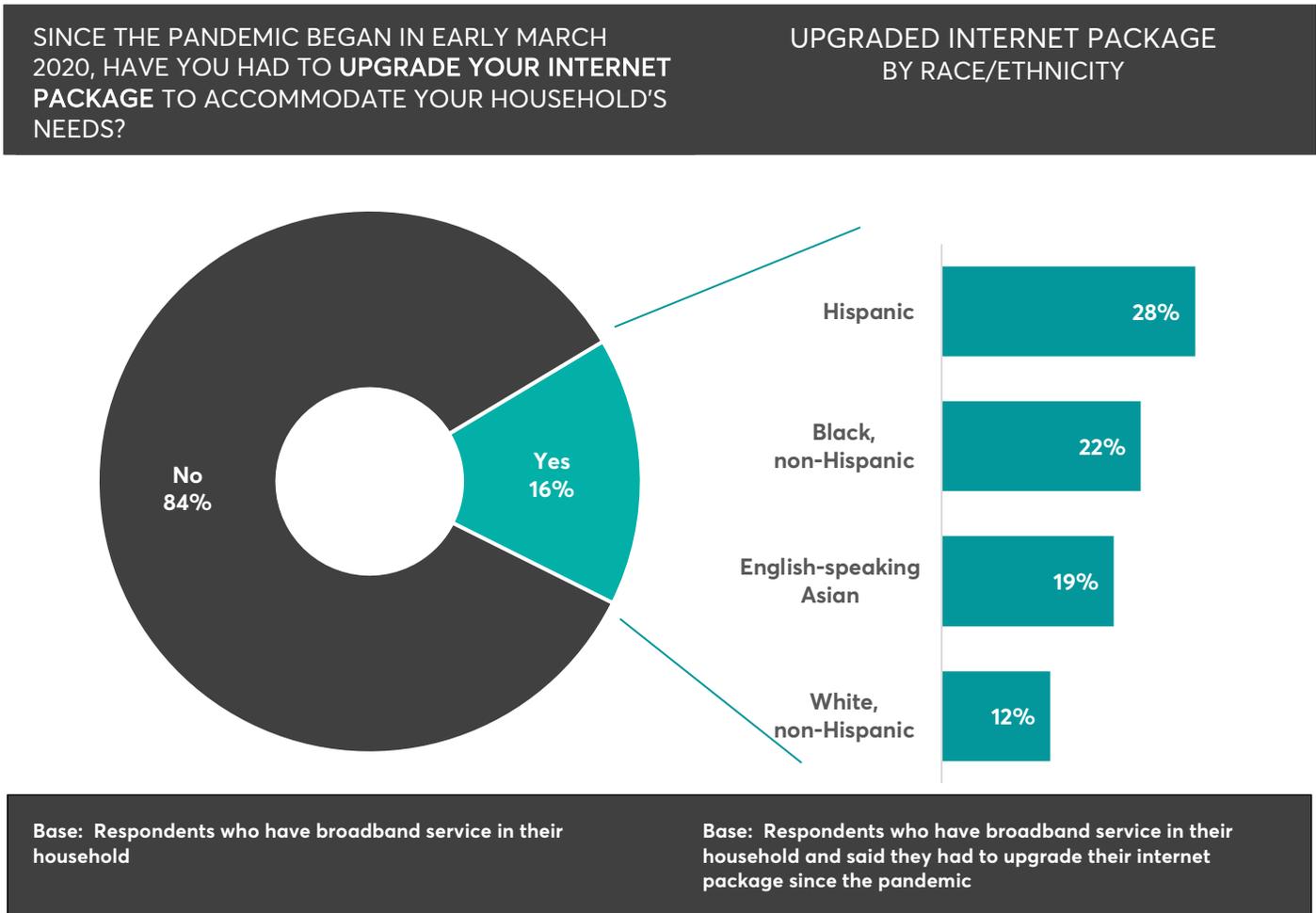
OF AMERICANS
WHO HAVE BROADBAND SERVICE
IN THEIR HOUSEHOLD

SAY THEY ARE USING THE INTERNET
LESS NOW THAN THEY DID PRIOR TO
THE START OF THE PANDEMIC

Internet Upgrades

Sixteen percent of Americans with broadband in their household say they had to **upgrade their internet package to accommodate their household's needs** since the pandemic began in early March 2020. **The median monthly increase reported is \$23.00.** A third of Americans who had to upgrade their internet package since the pandemic started in order to accommodate their household's needs say they are paying at least \$30 more per month for the upgrade.

Size of household play a significant role in needing to upgrade the household internet package. The larger the household, the more likely to report a need to upgrade³. Also, the need to upgrade was felt disproportionately among Black and Hispanic Americans. **A larger percentage of Hispanic (28%) and Black, non-Hispanic (22%) Americans than white, non-Hispanic (12%) Americans report having to upgrade their internet package to accommodate their household's needs since the pandemic began in early March 2020⁴.**



³ These differences remain significant when controlling for age, gender, education level, household income, urbanicity, race/ethnicity, and political party affiliation.

⁴ These differences remain significant when controlling for age, gender, education level, household income, urbanicity, household size, and political party affiliation.

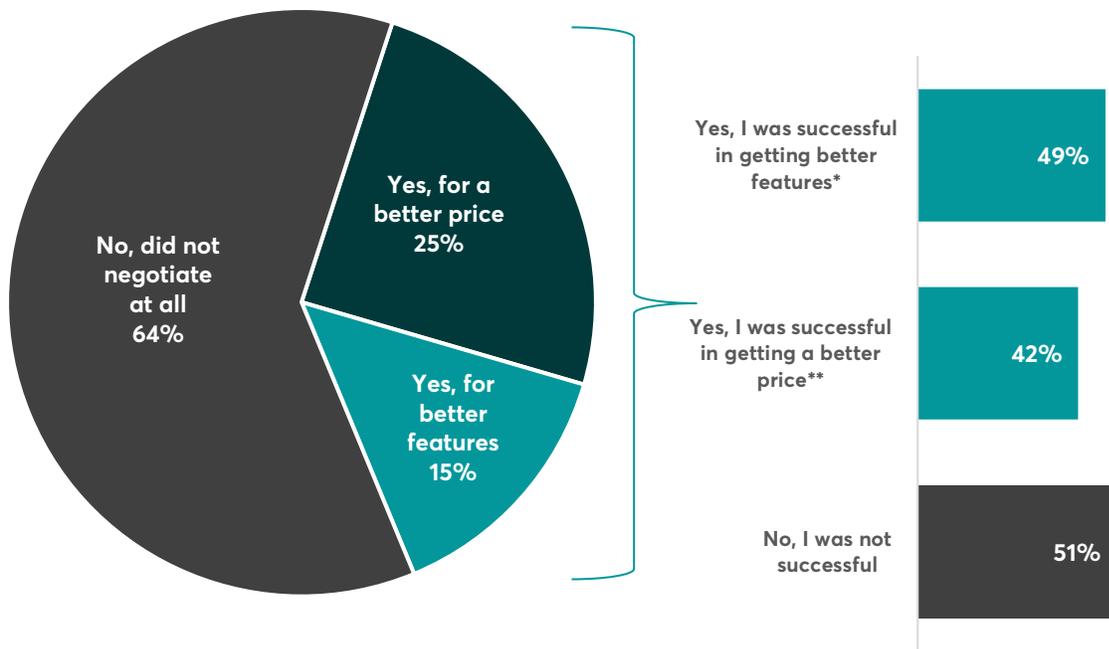
IT PAYS TO NEGOTIATE

Nearly **two-thirds (64%)** of Americans who have a broadband service in their household say they **have not tried to negotiate** with their internet service provider for a better price or better features in the past 12 months. Yet, **for those who have, nearly half were successful** in receiving a better price or getting better features.

Of those who tried to negotiate for a better price, 42% were successful in getting one and for those who bargained for better features, nearly half (49%) were successful.

HAVE YOU TRIED TO NEGOTIATE WITH YOUR INTERNET SERVICE PROVIDER FOR A BETTER PRICE OR BETTER FEATURES?

WERE YOU SUCCESSFUL NEGOTIATING FOR A BETTER PRICE OR BETTER FEATURES?



Base: Respondents who have broadband service in their household

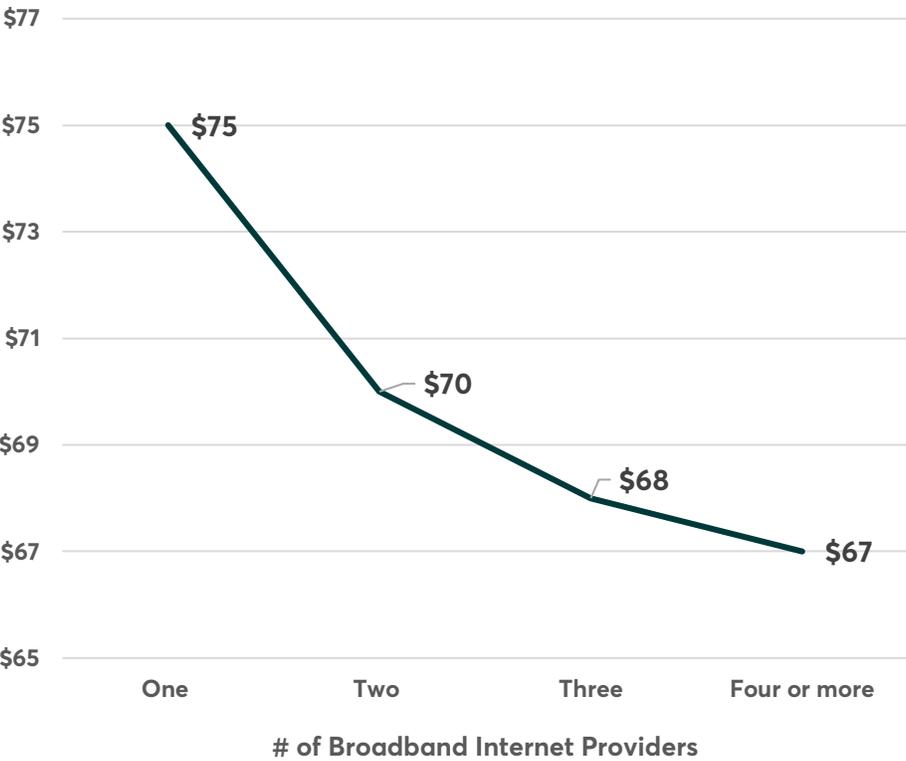
Base: Respondents who have broadband service in their household and tried to negotiate for a better price, better features, or both in the past 12 months

Note: Respondents selected all that apply. *Respondents who said they tried to negotiate for better features so they were shown and able to select this response. **Respondents who said they tried to negotiate for a better price so they were shown and able to select this response.

COST OF BROADBAND

Overall, the median amount paid by Americans with broadband service is **\$70 per month** (including taxes and fees.). However, this varies by the amount of competition. The median cost of broadband service is \$75 per month for Americans who say they only had one broadband service provider available to choose from, while broadband users who had four or more options pay a median of \$67 per month.

MEDIAN COST OF MONTHLY INTERNET SERVICE BY THE NUMBER OF BROADBAND INTERNET PROVIDERS AVAILABLE TO CHOOSE FROM



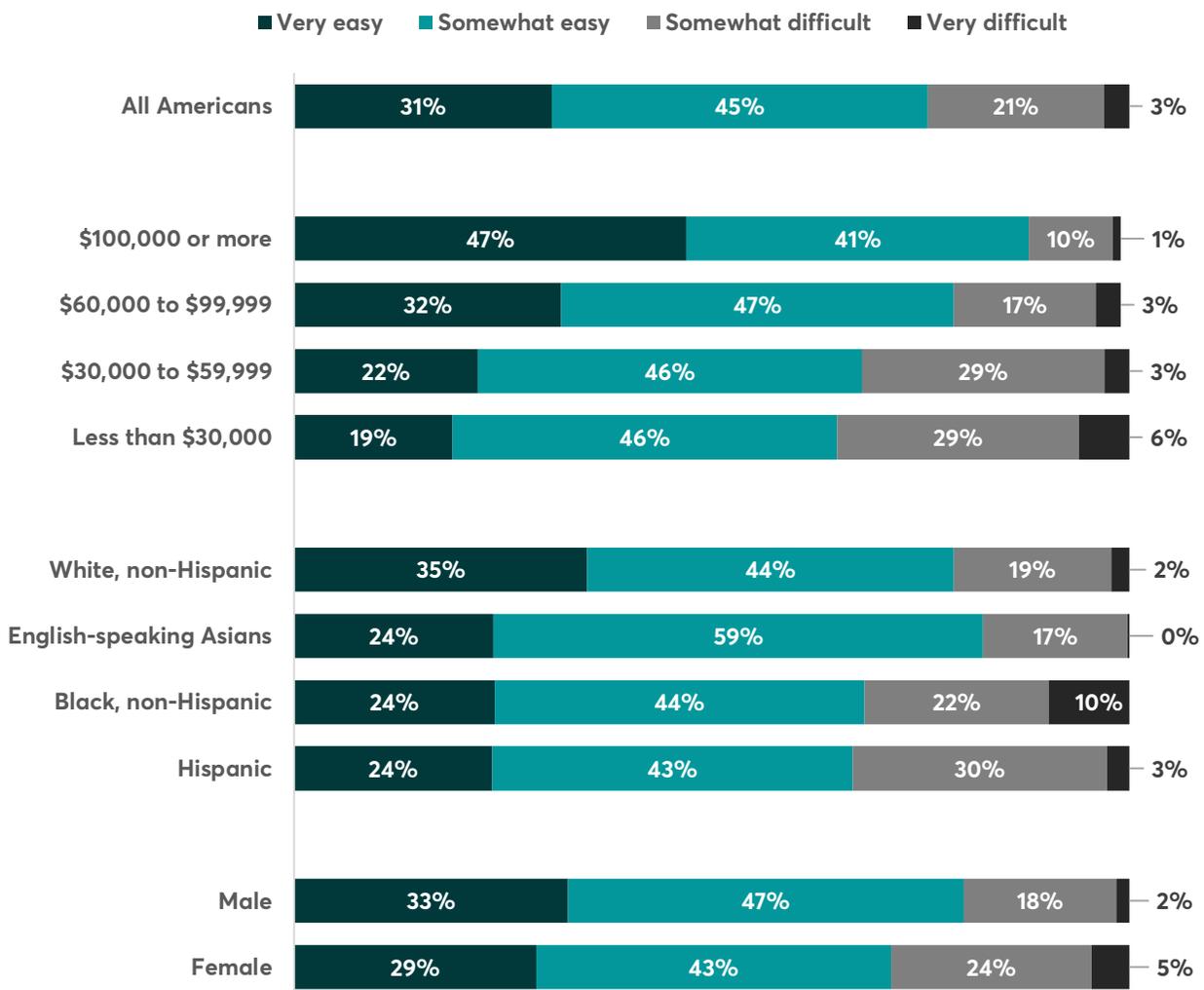
Base: Respondents who have broadband service in their household

Affordability

Nearly a quarter of Americans (24%) who have a broadband service in their home say it's difficult (somewhat difficult, 21%; very difficult, 3%) to afford their monthly broadband costs. There is a clear relationship between household income and affordability – those with lower household incomes are more likely to report having difficulty affording their monthly broadband bill⁵.

A larger percentage of Black, non-Hispanic (32%) and Hispanic (33%) Americans than white, non-Hispanic Americans (21%) say it's 'somewhat' or 'very' difficult to afford their monthly internet costs⁶.

HOW EASY OR DIFFICULT IS IT TO AFFORD YOUR MONTHLY INTERNET COSTS?



Base: Respondents who have broadband service in their household

⁵ These differences remain significant when controlling for age, gender, education level, race/ethnicity, urbanicity, household size, and political party affiliation.

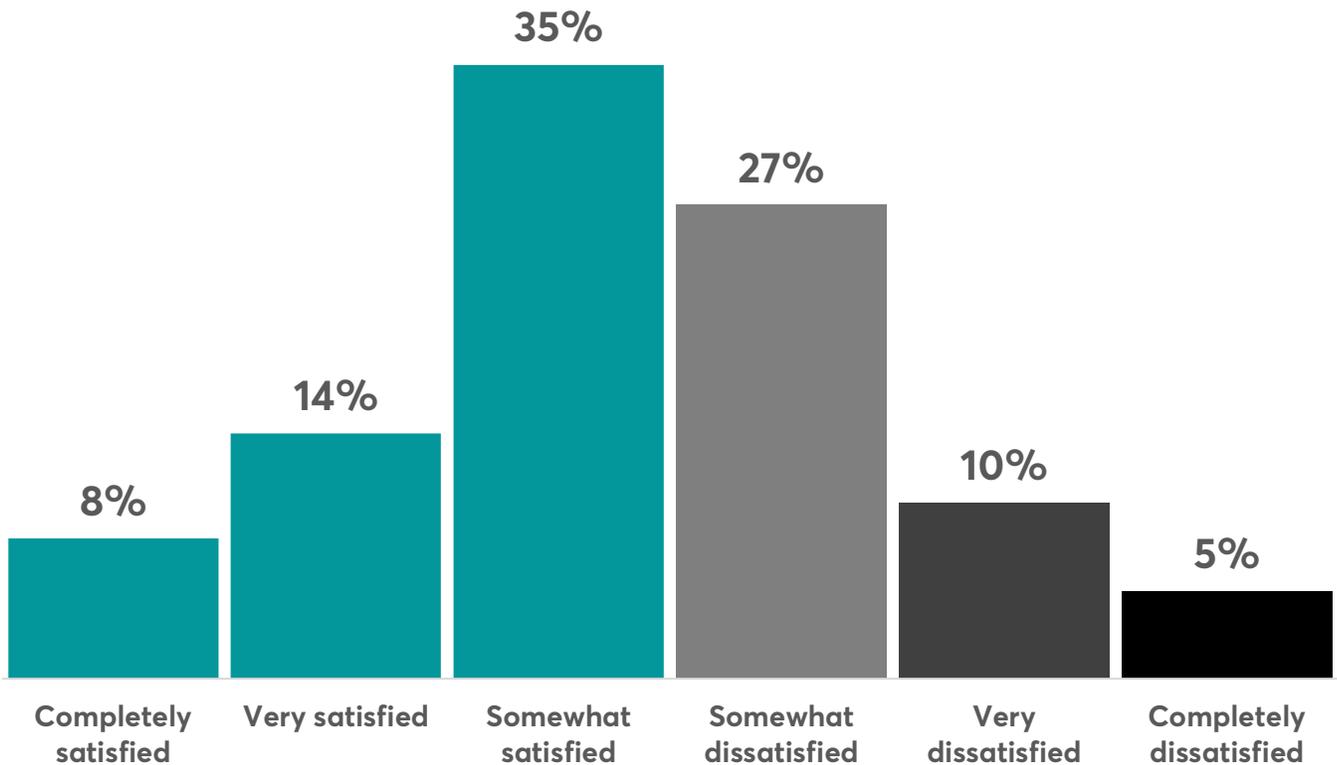
⁶ These differences remain significant when controlling for age, gender, education level, household income, urbanicity, household size, and political party affiliation.

Satisfaction with the Price of Broadband

We asked Americans how satisfied or dissatisfied they are with the price they pay (i.e., value for the money) for their broadband internet service. **Forty-three percent of Americans who have broadband service** in their household say they are **dissatisfied with the value they get for the money**. Only two in ten (22%) say they are 'completely' (8%) or 'very' (14%) satisfied with the value they get for the money.

Satisfaction with the price people pay is highly related to both the actual price they pay for internet service and how easy or difficult they say it is to afford their monthly internet costs⁷.

HOW SATISFIED OR DISSATISFIED ARE YOU WITH THE PRICE YOU PAY FOR YOUR INTERNET SERVICE?



Base: Respondents who have broadband service in their household

⁷ These differences remain significant when controlling for age, gender, education level, household income, urbanicity, household size, race/ethnicity, and political party affiliation.

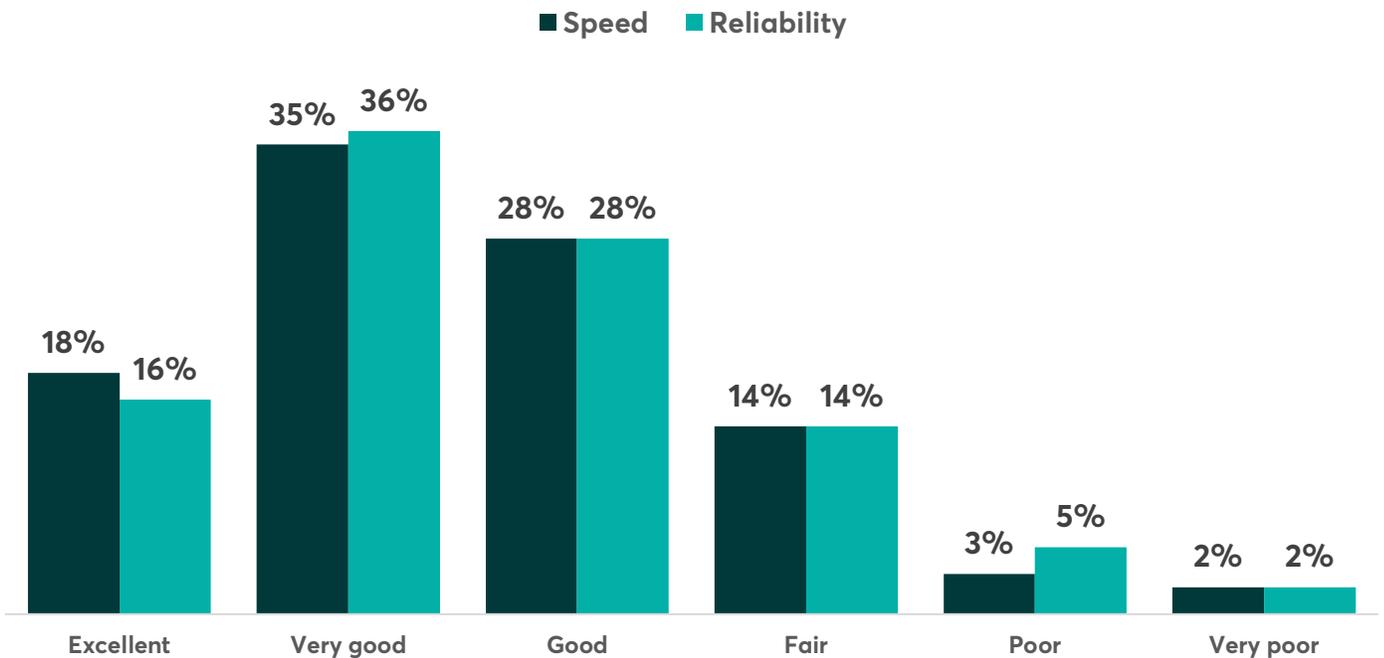
BROADBAND INTERNET SERVICE RATINGS

Speed and Reliability

We asked respondents to tell us how well their home internet service meets their household's needs (including work, school, entertainment, personal, etc.). They were asked to rate the speed and reliability of their home internet connection on a six-point from "very poor" to "excellent."

More than half of Americans with broadband internet service in their household say the SPEED (54%) and RELIABILITY (52%) of their home internet connection is 'excellent' or 'very good.'

SPEED AND RELIABILITY OF HOME BROADBAND INTERNET CONNECTION RATINGS

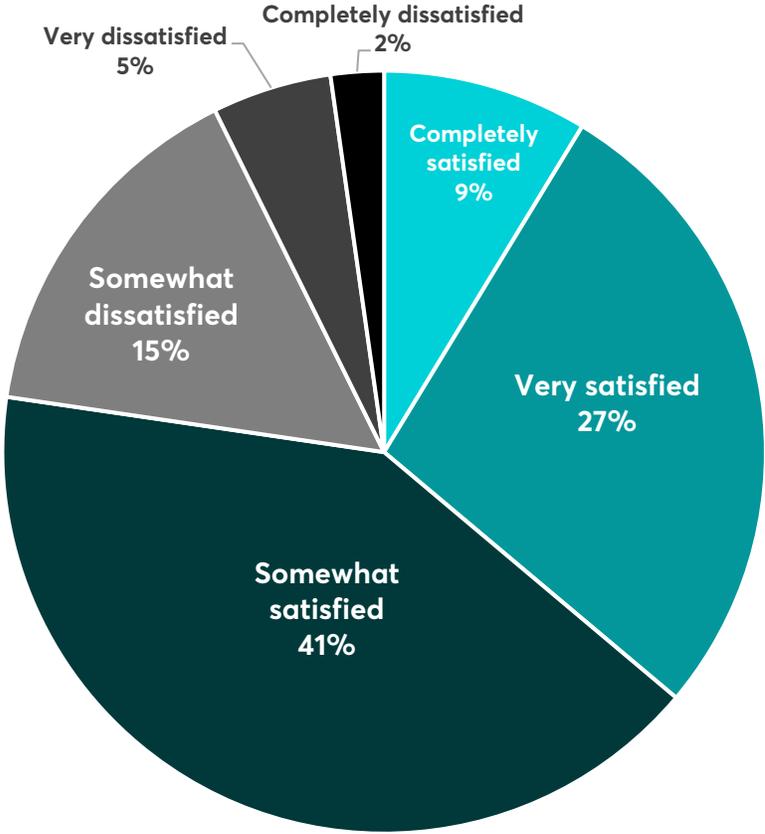


Base: Respondents who have broadband service in their household

Overall Satisfaction

More than three out of four (77%) Americans who have broadband service in their household say they are satisfied overall with their current internet service.

OVERALL SATISFACTION WITH CURRENT HOME BROADBAND SERVICE



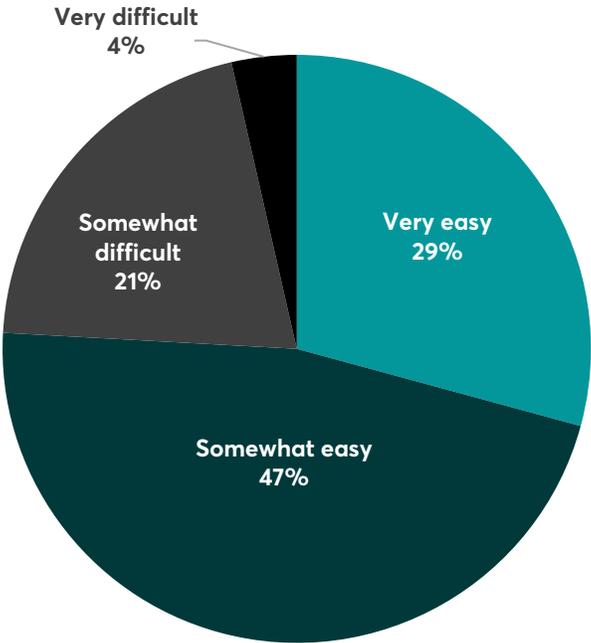
Base: Respondents who have broadband service in their household

UNDERSTANDING YOUR INTERNET BILL

Four in 10 Americans who have broadband service in their household say they review their bill **every time** before they pay it. Twenty-eight percent say they **sometimes** review it, two in 10 say they **hardly ever** review it, while 12% **never** review it.

About three out of four (76%) Americans who have broadband service in their home say it is **easy to understand their internet service bill** (very easy, 29%; somewhat easy, 47%.)

HOW EASY OR DIFFICULT IS IT TO UNDERSTAND YOUR INTERNET SERVICE BILL?



Base: Respondents who have broadband service in their household

OPINIONS ABOUT MUNICIPAL/COMMUNITY BROADBAND

We presented Americans with the following statement: "Local city and town governments around the United States are considering setting up public internet networks (also known as municipal or community broadband service) for their residents." We asked them, "Which of the following statements best describes how you feel, even if neither is exactly right?"

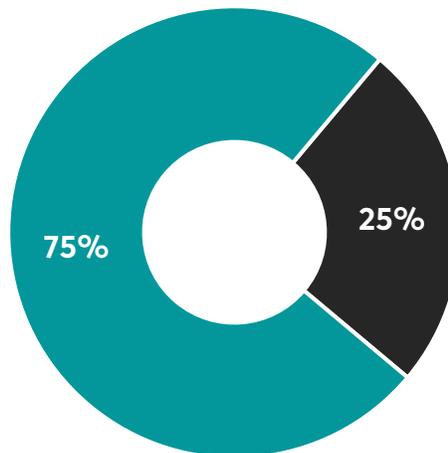
Statement 1: "Municipal or community broadband **should not** be allowed because it would be unfair to private internet companies to have to compete with government-funded networks, which could interfere with the growth of technology and the freedom of internet usage."

Statement 2: "Municipal or community broadband **should be** allowed because it would ensure that broadband access is treated like other vital infrastructure such as highways, bridges, water systems, and electrical grids, allowing all Americans to have equal access to it."

Three out of four Americans feel that municipal/community broadband **should be allowed**. A larger percentage of Democrats (85%) than Independents (74%) and Republicans (63%) say municipal/community broadband should be allowed⁸.

SHOULD MUNICIPAL/COMMUNITY BROADBAND BE ALLOWED?

- Municipal/community broadband **SHOULD NOT** be allowed
- Municipal/community broadband **SHOULD BE** allowed



Base: All respondents

⁸ These differences remain significant when controlling for age, gender, education level, household income, urbanicity, household size, and race/ethnicity.

SUMMARY

High speed internet access impacts every aspect of our day-to-day lives. We rely on it for the conveniences and efficiencies it provides and its importance on education, employment, health and public safety, government operations, transportation, commerce, and more. Yet, accessible and affordable broadband continues to be out of reach for many Americans.

Approximately **three out of four Americans say they have broadband service in their household**. Two in 10 Americans say their household relies on DSL or a cellular plan to connect to the internet at home. And, three percent of Americans say their **household does not have access to the internet**.

However, home **broadband adoption shows significant demographic disparities**. A larger percentage of Black, non-Hispanic Americans than white, non-Hispanic Americans say they do not have broadband at home and those with lower education and income are less likely to have broadband at home. In addition, where you live influences access and availability of broadband services. Individuals living in urban areas are more likely than those in rural or suburban areas to have broadband in their household and are more likely to have a greater number of choices in broadband providers.

Affordable broadband is a real problem – for both those who don't have it and those who do. Nearly **a third of Americans *who don't have broadband*** say it is because it **costs too much**. And for those ***who do have broadband at home*** – **about a quarter of them say it's difficult to afford their monthly broadband costs**. Difficulty in being able to afford broadband at home is felt disproportionately among Black and Hispanic Americans. A larger percentage of Black, non-Hispanic (32%) and Hispanic (33%) Americans than white, non-Hispanic Americans (21%) say it's 'somewhat' or 'very' difficult to afford their monthly internet costs. **Forty-three percent** of Americans who have broadband service in their household say they are **dissatisfied with the value they get for the money**.

Nevertheless, there is one universal cost-savings tip -- it pays to negotiate with your broadband service provider. Nearly **two-thirds (64%) of Americans** who have a broadband service in their household say they **have not tried to negotiate** with their internet service provider for a better price or better features in the past 12 months. Yet, **for those who have, nearly half were successful** in receiving a better price or getting better features.

METHODOLOGY

This multi-mode survey was fielded by NORC at the University of Chicago using a nationally representative sample. The survey was conducted from June 4-28, 2021. Interviews were conducted in English and in Spanish, and were administered both online and by phone.

A general population sample of U.S adults age 18 and older was selected from NORC's AmeriSpeak® Panel for this study. Funded and operated by NORC at the University of Chicago, AmeriSpeak® is a probability-based panel designed to be representative of the US household population. Randomly selected US households are sampled using area probability and address-based sampling, with a known, non-zero probability of selection from the NORC National Sample Frame. These sampled households are then contacted by US mail, telephone, and field interviewers (face to face). The panel provides sample coverage of approximately 97% of the U.S. household population. Those excluded from the sample include people with P.O. Box only addresses, some addresses not listed in the USPS Delivery Sequence File, and some newly constructed dwellings. While most AmeriSpeak households participate in surveys by web, non-internet households can participate in AmeriSpeak surveys by telephone. Households without conventional internet access but having web access via smartphones are allowed to participate in AmeriSpeak surveys by web. AmeriSpeak panelists participate in NORC studies or studies conducted by NORC on behalf of governmental agencies, academic researchers, and media and commercial organizations.

In total, NORC collected 2,565 interviews, 2,424 by web mode and 141 by phone mode. The margin of error for the sample of 2,565 is +/- 2.63 percentage points at the 95% confidence level. Smaller subgroups will have larger error margins. In addition, we oversampled English-speaking Asian Americans. This sample of Asian Americans is composed of people from many different countries of origin and ethnicities, and all took the survey in English. Panelists were offered the cash equivalent of \$2 after successfully completing the survey.

Final data are weighted by age, gender, race/Hispanic ethnicity, housing tenure, telephone status, education, and Census Division to be proportionally representative of the U.S. adult population. Key demographic characteristics (after weighting is applied) of this sample are presented below:

- 52% female
- Average age of 48 years old
- 63% White, Non-Hispanic
- 35% 4-year college graduates
- 56% have a household income of \$50,000 or more