

# **An Overview of Home Internet Access in the U.S.**

December, 2008

## **Summary**

One proposal of the incoming Obama administration is to ensure that all have access to high-speed internet service. In fact, the President Elect's campaign website clearly states, "Obama and Biden believe we can get true broadband to every community in America. In a paragraph on the site entitled, "Deploy Next-Generation Broadband," it says "Barack Obama believes that America should lead the world in broadband penetration and Internet access. As a country, we have ensured that every American has access to telephone service and electricity, regardless of economic status, and Obama will do likewise for broadband Internet access. Obama and Biden believe we can get true broadband to every community in America through a combination of reform of the Universal Service Fund, better use of the nation's wireless spectrum, promotion of next-generation facilities, technologies and applications, and new tax and loan incentives."

This Nielsen Company report on home internet access (IA) aggregates data from several different sources including the national and local television panels, the quarterly Home Technology phone survey (through 3<sup>rd</sup> quarter, 2008), and the Nielsen Claritas 2008 Convergence Audit survey, which is a combination of internet and mail respondents.<sup>1</sup> In this paper we will note differences in internet access by geography and a number of socio-economic factors. Note that the metered TV panel data do not distinguish between the type of internet connection in the home, e.g., dial-up vs. high-speed, however. For that information we will look at two other internal sources: the quarterly Home Technology survey and annual Nielsen Claritas Consumer Audit.

Four-fifths (80.6%) of all homes in Nielsen's national TV panel have a home computer as of November, 2008. Over ninety percent of them, or about three-fourths of all panelist homes, also have access to the internet in their home. So while there are a sizable number of PC homes that do not have web access, there is actually a greater number who do not have a personal computer, either for economical or technological reasons.

These numbers are virtually identical to the most recent wave of Nielsen's Home Technology telephone study. According to the HT survey, over one-half (57%) of all American homes now have access to a high-speed internet service. Another 17% subscribe to a dial-up service. And according to the most recent Consumer Audit survey the average home spends about \$37 per month for their home internet service, about one half of what they spend individually on cell phone and TV service.

There are marked differences in the types of homes that have any internet service at home, as well as those who subscribe to a high-speed service, compared to a dial-up offering. (Indices for sixteen different demographic breaks, based on Nielsen's National television panel, are contained in an Appendix A at the end of this report. The higher the index, the higher the IA level.) Among the most pronounced differences:

- Internet access is positively correlated with the respondent's or Head of Household's education level as well the home's combined annual income. As they increase, so does the likelihood of internet access.
- IA of either type (high-speed or dial-up) is lowest in Spanish Dominant (45 index) and Black homes (65) and where the head of household has not completed a high school education (43).
- Access is higher where there are children under 18 in the home. Conversely, in one-person households the IA index is 58, meaning access is below-average in these homes.
- Internet access is much lower (69 index) in the most rural areas—"D" counties.
- Access is two times lower (47 index) in "broadcast only" homes.

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<sup>1</sup> The Home Technology Report findings are based on 5,200 completed interviews since 4th quarter, 2007. The 2008 Convergence Audit included 25,000 internet completions and 7,000 returned mail surveys. Both surveys were weighted to be representative of the total United States.

- Internet access is also lower (66) in homes that are light in other media, where there is only a single TV set.
- Dial-up internet homes are older with more modest incomes and lower education levels than high-speed internet homes. They are also more likely to be retired or out of work.

### Detailed Findings

Overall, 80.6% of homes in Nielsen’s National People Meter panel have a computer (either desktop or laptop) in their homes as of mid-November, 2008. Over the past year that number has inched upward slightly, from 77.9% a year ago. And nine of ten homes with home computers (91.6%) have some sort of internet connection: 73.9% of all U.S. panel homes have some sort of internet access. That figure is up three full points from November, 2007. Even so, part of the challenge in extending web access to all Americans is that there are more homes without homes computers than there are PC homes without the Internet.

We look to two other Nielsen Company surveys—the quarterly Home Technology Report and annual Convergence Audience—to learn more about the type of internet connection; e.g., dial-up and high-speed. Both studies confirm that a high-speed internet connection is more likely to be found among younger respondents and in more “upscale” homes--those with higher incomes, more education and professional occupations.

**Table 1—  
Home Internet Connection Type by Respondent Age  
(2008 Nielsen Claritas Convergence Audit)**

Age	No Internet	High-Speed	Dial-up	Total
18-34	12%	78%	10%	100%
35-44	14%	76%	11%	100%
45-54	19%	69%	12%	100%
55-64	24%	64%	12%	100%
65+	40%	50%	10%	100%
<b>Total</b>	<b>22%</b>	<b>67%</b>	<b>11%</b>	<b>100%</b>

In general, access is lowest in the youngest and oldest sample homes, likely the result of household income. Appendix A shows that homes headed by someone less than 25 (an index of 78) or 65 years plus (62) under-index in access. Homes with a 35-54 year old HOH have the highest levels (132 index).

Table 1 is based on the 2008 Nielsen Claritas Convergence Audit and shows how internet connection type varies by the respondent’s age. Technological familiarity is certainly a deciding factor in whether someone has a computer and internet access. Table 1 shows that 40% of respondents aged 65+ report having no home internet connection. Meanwhile, high-speed is most prevalent among the youngest respondents: over three-fourths of 18-34 year olds have this service at home.<sup>2</sup> Dial-up service is very consistent across all five age categories, averaging 11%. It would be unlikely that free access alone would be the deciding factor in boosting home internet access among the oldest sector, based on technological considerations.

**Table 2—  
Home Internet Connection Type by Education Level  
(2008 Nielsen Claritas Convergence Audit)**

Education Completed	No Internet	High-Speed	Dial-up	Total
Grade school	73%	22%	5%	100%
Some High School	63%	28%	9%	100%
HS grad	36%	53%	11%	100%
Some college	15%	74%	12%	100%
College grad	11%	78%	10%	100%
Post college grad	13%	77%	10%	100%
<b>Total</b>	<b>22%</b>	<b>67%</b>	<b>11%</b>	<b>100%</b>

Education level is also a driving factor in the presence and type of internet connection. Homes with a college graduate HOH (273) had one of the highest indices for all breaks other than income. Conversely, homes where the HOH did not complete high school index at only 43, the lowest number for all breaks. Using the CA study to get at type of access, among those who only completed grade school nearly three-fourths do not have the internet in their home and only 22% have a

<sup>2</sup> High-speed service includes DSL, cable, satellite, wireless, fiber and Wi-Max.

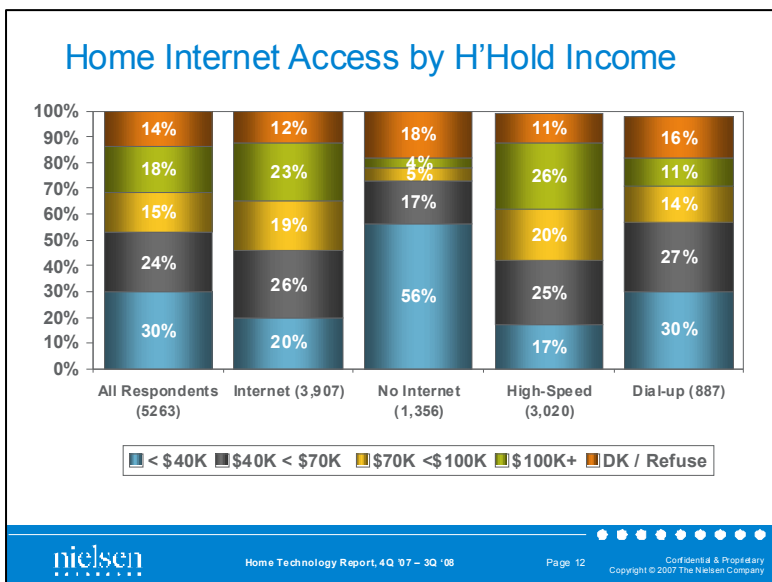
high-speed service. About three-quarters of those who have attended at least some college have a high-speed connection at home. While not shown here, it follows that those employed in white collar and profession occupations are also more likely to have high-speed service while those who are unemployed or not in the labor force are much less likely to have any type of connection, let alone high-speed.

**Table 3—  
Home Internet Connection Type by Income Level  
(2008 Nielsen Claritas Convergence Audit)**

Annual H'hold Income	No Internet	High-Speed	Dial-up	Total
Less than \$25K	38%	48%	13%	100%
\$25-49K	25%	63%	12%	100%
\$50-74K	18%	72%	10%	100%
\$75-199K	13%	79%	8%	100%
\$200K+	22%	69%	8%	100%
<b>Total</b>	<b>22%</b>	<b>67%</b>	<b>11%</b>	<b>100%</b>

Income, too, is positively correlated to high-speed connection as seen in Appendix A and Table 3. Homes in the TV sample with a combined income of \$125K had the single highest IA index—723. Those with incomes less than \$25K annually were only at 44. The CA study offers a higher income ceiling but the results are similarly. Nearly 80% of those making between \$75,000 and less than \$200,000 have a high-speed internet service. Given the price of high-speed internet it is somewhat surprising to see that nearly one-half (48%) of those making less than \$25,000 annually subscribe to the faster option. Again, the differences aren't nearly as pronounced for dial-up service by income.

Another way to look at the ties between income and internet access is to look at the income distribution for each of four categories as graphed to the right. For instance, 20% of the homes with any type of internet service have an annual income of less than \$40,000. However, within the group with no access, the lowest income group account for more than half (56%) of all homes. Conversely, over one-fourth of those with high-speed access (26%) earn at least \$100,000 annually. Only 11% of the dial-up universe earns that much.



**Table 4—  
Home Internet Connection Type by Presence of Kids/Teens  
(2008 Nielsen Claritas Convergence Audit)**

Presence of Children/Teens	No Internet	High-Speed	Dial-up	Total
Yes	14%	75%	11%	100%
No	26%	63%	11%	100%
<b>Total</b>	<b>22%</b>	<b>67%</b>	<b>11%</b>	<b>100%</b>

Appendix A reveals that presence of a teenager (12-17) is the group most likely of all kids breaks to have IA (188), followed by LT 12 (113). Homes with no children actually *under-index* (90) slightly on internet access.

From the Convergence Audit survey, Table 4 also illustrates that homes with children and/or teenagers show a greater likelihood to have internet access (75% + 11% = 86%), including high-speed service (75%).

## Home Internet Connection Type by Race & Hispanic/Latino Origin

In the national TV panel, Appendix A depicts how Asian respondents were most likely of all minority groups to have ANY internet service (198 index). Black (65) and Hispanic homes (67) were least likely to have any home internet service. Within the Hispanic break, those homes where the language spoken is primarily Spanish index slightly lower (45).

**Table 5—  
Home Internet Connection Type by Geographic Region  
(2008 Nielsen Claritas Convergence Audit)**

Geographic Region	No Internet	High-Speed	Dial-up	Total
New England	19%	71%	10%	100%
Middle Atlantic	24%	66%	9%	100%
East North Central	22%	66%	11%	100%
West North Central	21%	67%	12%	100%
South Atlantic	21%	69%	10%	100%
East South Central	26%	61%	13%	100%
West South Central	22%	67%	11%	100%
Mountain	22%	67%	11%	100%
Pacific	20%	69%	11%	100%
<b>Total</b>	<b>22%</b>	<b>67%</b>	<b>11%</b>	<b>100%</b>

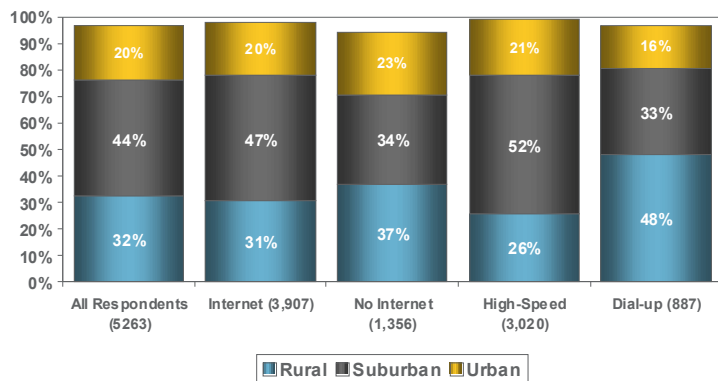
Based on the CA survey, the East South Central region of the U.S. was the sole area where ANY access and high-speed service varied by more at least four percentage points from the national average. High speed service was highest in the New England region, four points above the national average.

Part of the challenge in extending high-speed access to all Americans may involve extending the reach of the pipeline itself out to America's rural areas. From the Home Technology Study over the past four quarters we found larger percentages among those living in rural regions for non-internet and dial-up homes.

In terms of County Size, Appendix A shows how the largest counties ("A") have the greatest internet levels (125) while the smallest, most rural areas under-index at 69.

It was a lack of access to cable service that helped fuel the rise of Direct Broadcast Satellite providers in the 1980s and 1990s. It may require a wireless solution to grant them the same access to high-speed internet access.

## Home Internet Access by Residential Zone



## Internet Access Based on Nielsen's 56 Local Metered Market samples

The Nielsen Company also collects whether a household has home access to the internet within their local markets that use set meter technology for the television tuning estimates. These metered samples are in fifty-six of the country's largest markets and represent 70% of the Total U.S. household population. From this information insight can be gained about the types of homes without access to the internet at home in this coverage area. Because they tend to be in more densely populated and urban regions, they contain populations that are more upscale (income, education) but also more ethnically diverse.

Currently 23% of installed households do not have access to the internet at home. This compares to 26% last December.

As we saw from the survey data in the previous section, we can confirm that the metered market data show:

- Homes with a lower educated householder and lower household incomes are least likely to have internet access. Only 3% of households with incomes over \$125K do not have home internet access.
- Spanish Dominant Hispanics and Blacks are more likely to not have home internet access, while Asians rank among one of the highest groups with access.
- Households with only Over the Air distribution of their TV signals are more likely to not have home internet access and those with Digital Cable most likely.

The characteristics of households without home internet access are detailed in Tables 1 and 2. This information is also available for each of the individual 56 metered markets.

**Table 1**

**% of HH without Home Internet Access by Household Characteristic**  
Across all Local Meter Markets

Characteristic	Dec07	Dec08	Change	Characteristic	Dec07	Dec08	Change
<b>Total Households</b>	<b>26%</b>	<b>23%</b>	<b>-2%</b>				
AOH <25	34%	30%	-4%	<4 Yrs. High School	67%	64%	-2%
AOH 25-34	20%	18%	-3%	4 Yrs. High School	40%	37%	-3%
AOH 35-54	19%	17%	-2%	1-3 College	22%	20%	-2%
AOH 55-64	24%	23%	-1%	4+ Yrs. College	10%	8%	-2%
AOH 65+	45%	41%	-3%				
Household Size, 1	45%	42%	-3%	Under \$25,000	61%	59%	-3%
Household Size, 2	22%	20%	-2%	\$25,000-\$49,999	34%	30%	-3%
Household Size, 3-4	17%	14%	-3%	\$50,000-\$74,999	16%	13%	-2%
Household Size, 5+	20%	18%	-2%	\$75,000-\$99,999	8%	7%	-1%
No Children <18	30%	27%	-3%	\$100,000-\$124,999	5%	4%	-1%
Only Kids <12	20%	18%	-3%	\$125,000+	3%	3%	0%
Any Teens 12-17	17%	15%	-2%				
Hispanic	42%	37%	-5%	POM	13%	11%	-2%
Spanish Dominant	63%	58%	-6%	Blue Collar - Skilled	28%	25%	-3%
Spanish Non-Dominant	29%	26%	-3%	Blue Collar- Unskilled	36%	32%	-3%
Non-Hispanic	24%	22%	-2%	Not in Labor Force	39%	37%	-2%
Black	38%	37%	-1%	Landline Phone: Yes	23%	21%	-2%
Non-Black	24%	21%	-3%	Lanline Phone: No	46%	39%	-7%
Asian	13%	13%	0%				
Non-Asian	26%	24%	-2%	Home Ownership Owned	20%	18%	-2%
Broadcast Only	46%	49%	2%	Home Ownership Rented	42%	38%	-3%
Cable Plus	23%	20%	-3%				
Cable No	30%	29%	-2%	Structure Single Family Home	21%	19%	-2%
Cable Yes	23%	20%	-3%	Structure Multi Family Home	38%	36%	-2%
Digital Cable	15%	13%	-2%	Structure Mobile Home	49%	44%	-5%
ADS	22%	20%	-2%	Own a Second Home	17%	16%	-1%
No ADS	27%	24%	-2%				
DVR Yes	8%	8%	-1%	Sex Of Head Male	23%	20%	-3%
Non-DVR	31%	30%	-1%	Sex Of Head Female	28%	26%	-2%
Video Game	17%	13%	-4%				
				1 TV Set	38%	36%	-2%
				2 TV Sets	31%	29%	-2%
				3 TV Sets	24%	21%	-3%
				4+ TV Sets	16%	14%	-2%

Dec07: Avg. week ending 12/16/07; Dec08: Avg. week ending 12/14/08

**Table 2 (ranked by highest penetration of no internet access)**

**% of HH without Home Internet Access by Household Characteristic  
Across all Local Meter Markets**

Characteristic	Dec07	Dec08	Change	Characteristic	Dec07	Dec08	Change
<b>Total Households</b>	<b>26%</b>	<b>23%</b>	<b>-2%</b>	3 TV Sets	24%	21%	-3%
<4 Yrs. High School	67%	64%	-2%	Landline Phone: Yes	23%	21%	-2%
Under \$25,000	61%	59%	-3%	Non-Black	24%	21%	-3%
Spanish Dominant	63%	58%	-6%	Sex Of Head Male	23%	20%	-3%
Broadcast Only	46%	49%	2%	Household Size, 2	22%	20%	-2%
Structure Mobile Home	49%	44%	-5%	ADS	22%	20%	-2%
Household Size, 1	45%	42%	-3%	Cable Plus	23%	20%	-3%
AOH 65+	45%	41%	-3%	1-3 College	22%	20%	-2%
Lanline Phone: No	46%	39%	-7%	Cable Yes	23%	20%	-3%
Home Ownership Rented	42%	38%	-3%	Structure Single Family Home	21%	19%	-2%
Hispanic	42%	37%	-5%	Household Size, 5+	20%	18%	-2%
4 Yrs. High School	40%	37%	-3%	Only Kids <12	20%	18%	-3%
Not in Labor Force	39%	37%	-2%	AOH 25-34	20%	18%	-3%
Black	38%	37%	-1%	Home Ownership Owned	20%	18%	-2%
Structure Multi Family Home	38%	36%	-2%	AOH 35-54	19%	17%	-2%
1 TV Set	38%	36%	-2%	Own a Second Home	17%	16%	-1%
Blue Collar- Unskilled	36%	32%	-3%	Any Teens 12-17	17%	15%	-2%
\$25,000-\$49,999	34%	30%	-3%	4+ TV Sets	16%	14%	-2%
AOH <25	34%	30%	-4%	Household Size, 3-4	17%	14%	-3%
Non-DVR	31%	30%	-1%	Video Game	17%	13%	-4%
2 TV Sets	31%	29%	-2%	\$50,000-\$74,999	16%	13%	-2%
Cable No	30%	29%	-2%	Digital Cable	15%	13%	-2%
None <18	30%	27%	-3%	Asian	13%	13%	0%
Sex Of Head Female	28%	26%	-2%	POM	13%	11%	-2%
Spanish Non-Dominant	29%	26%	-3%	4+ Yrs. College	10%	8%	-2%
Blue Collar - Skilled	28%	25%	-3%	DVR Yes	8%	8%	-1%
No ADS	27%	24%	-2%	\$75,000-\$99,999	8%	7%	-1%
Non-Asian	26%	24%	-2%	\$100,000-\$124,999	5%	4%	-1%
55-64	24%	23%	-1%	\$125,000+	3%	3%	0%
Non-Hispanic	24%	22%	-2%				

Dec07: Avg. week ending 12/16/07; Dec08: Avg. week ending 12/14/08

Those individual local markets with the highest percentage of low income homes, as well as the highest percentage of households of Black Race and/or Hispanic Origin rank among those with the highest penetration of homes without access to the internet.

- The five markets with the highest percentage of homes with access are Washington, DC, Norfolk, Salt Lake City, Boston and Portland. Those with the lowest percentages are Knoxville, Greenville, Albuquerque, Memphis and Tulsa
- Looking at changes from last year, San Diego, Louisville, Richmond and Chicago have seen the largest percent growth in internet penetration from last year.

**Table 3 (Individual Metered Markets ranked by highest penetration of no internet access**

**% of HH without Home Internet Access by Market**

Across all Local Meter Markets

Market	Dec07	Dec08	Change	Market	Dec07	Dec08	Change
<b>Across All Local Metered Markets</b>	26%	23%	-2%				
Knoxville Meter Market	37%	38%	1%	Greensboro-H.Point-W.Salem Meter Market	27%	23%	-4%
Greenvll-Spart-Ashevl-And Meter Market	39%	36%	-4%	Columbus, OH Meter Market	23%	23%	-1%
Albuquerque-Santa Fe Meter Market	38%	36%	-2%	Los Angeles People Meter Market	27%	23%	-4%
Memphis Meter Market	33%	34%	1%	Philadelphia People Meter Market	24%	22%	-1%
Tulsa Meter Market	37%	34%	-3%	Jacksonville Meter Market	26%	22%	-3%
New Orleans Meter Market	35%	32%	-2%	Phoenix (Prescott) People Meter Market	24%	22%	-2%
San Antonio Meter Market	33%	30%	-3%	Denver Meter Market	21%	22%	1%
Dallas-Ft. Worth People Meter Market	31%	29%	-3%	Cincinnati Meter Market	23%	21%	-2%
Birmingham (Ann and Tusc) Meter Market	30%	28%	-2%	Indianapolis Meter Market	24%	21%	-3%
Miami-Ft. Lauderdale Meter Market	32%	28%	-4%	Providence-New Bedford Meter Market	21%	21%	0%
Dayton Meter Market	31%	27%	-3%	Austin Meter Market	23%	21%	-2%
Cleveland-Akron (Canton) Meter Market	24%	27%	3%	Raleigh-Durham (Fayetteville) Meter Market	23%	20%	-3%
Ft. Myers-Naples Meter Market	27%	27%	0%	West Palm Beach-Ft. Pierce Meter Market	25%	20%	-4%
Houston People Meter Market	30%	27%	-3%	Milwaukee Meter Market	25%	20%	-5%
Buffalo Meter Market	29%	25%	-4%	Orlando-Daytona Bch-Melbrn Meter Market	21%	20%	-2%
Louisville Meter Market	33%	25%	-7%	Sacramnto-Stkton-Modesto Meter Market	20%	19%	0%
Tampa-St. Pete (Sarasota) People Meter Market	24%	25%	1%	Hartford & New Haven Meter Market	21%	19%	-2%
Detroit People Meter Market	26%	25%	-1%	Kansas City Meter Market	22%	18%	-4%
Nashville Meter Market	28%	25%	-3%	New York People Meter Market	19%	18%	-2%
Richmond-Petersburg Meter Market	30%	24%	-6%	Baltimore Meter Market	19%	17%	-2%
Pittsburgh Meter Market	25%	24%	-1%	San Francisco-Oak-San Jose People Meter Marke	19%	17%	-2%
Las Vegas Meter Market	27%	24%	-3%	San Diego Meter Market	25%	17%	-9%
Minneapolis-St. Paul Meter Market	22%	24%	2%	Seattle-Tacoma People Meter Market	18%	17%	-2%
Atlanta People Meter Market	27%	24%	-3%	Portland, OR Meter Market	17%	17%	0%
Oklahoma City Meter Market	28%	24%	-4%	Boston (Manchester) People Meter Market	20%	16%	-4%
St. Louis Meter Market	25%	23%	-2%	Salt Lake City Meter Market	17%	15%	-1%
Chicago People Meter Market	29%	23%	-6%	Norfolk-Portsmth-Newpt Nws Meter Market	18%	15%	-3%
Charlotte Meter Market	25%	23%	-2%	Washington, DC (Hagrstwn) People Meter Market	17%	14%	-3%

**Monthly Phone, Internet and TV Expenditures**

While there may be some homes who cannot afford a dial-up or broadband internet connection, it may not preclude them from spending on other phone or TV services. As mentioned at the beginning of this report, there are still 20% of U.S. homes that do not even have a personal computer, let alone internet access.

The Media Audit survey asks how much respondents spend on a number of services, including those in the right-hand table. As the two highlighted columns indicate, non-internet homes are still spending at the same levels for phone and TV service compared to internet homes.

	Have internet access	Do not have internet access	Have high speed internet access*	Have dial up internet access
Home local and long distance phone (if combined)	\$53.46	\$54.82	\$53.05	\$59.46
Home local phone (if separate)	\$38.32	\$36.54	\$38.43	\$38.92
Home long distance phone (if separate)	\$25.01	\$21.61	\$25.48	\$28.47
Cell/wireless phone	<b>\$80.99</b>	<b>\$72.74</b>	\$82.66	\$71.15
Satellite TV	<b>\$69.96</b>	<b>\$70.38</b>	\$70.57	\$66.61
Cable TV	<b>\$64.80</b>	<b>\$65.01</b>	\$64.81	\$61.14
Fiber optic TV	<b>\$66.90</b>	<b>\$78.40</b>	\$67.47	\$56.13
Internet	<b>\$36.79</b>	-	\$38.20	\$26.90

\*Includes DSL, cable, satellite, wireless, fiber and Wimax

**APPENDIX A**  
**Nielsen National People Meter Sample Characteristics of**  
**Homes Without Internet Access**  
**December 8-14, 2008**

Demographic Break	% of Total US (Daily Scaled Installed)	% of Non- accessible Universe.	Index
Wired Cable	61.3%	50.5%	122
No Wired Cable	38.6%	49.5%	78
Cable Plus	89.1%	77.2%	115
Broadcast Only	10.9%	22.9%	47
Wired Digital Cable	41.3%	23.0%	180
ADS	28.7%	27.1%	106
No ADS	71.3%	72.9%	98
HH Size = 1	22.6%	38.8%	58
HH Size = 2	34.3%	30.1%	114
HH Size = 3	15.9%	12.1%	131
HH Size = 4+	27.2%	19.0%	143
HH w/no children	64.5%	71.7%	90
HH w/children <12	26.7%	23.6%	113
HH w/children 12-17	8.8%	4.7%	188
HOH Race=Black	12.6%	19.3%	65
HOH Race= Non-black	87.4%	80.7%	108
Asian HHS	3.5%	1.8%	198
Non-Asian HHS	90.0%	88.7%	101
Hispanic	11.1%	16.5%	67
Spanish Dominant	4.3%	9.7%	45
Non-Spanish Dominant	95.7%	90.3%	106
Non-Hispanic	88.9%	83.5%	107
HOH Age <25	4.2%	5.4%	78
HOH Age 25-34	16.8%	15.6%	108
HOH Age 35-54	41.2%	31.2%	132
HOH Age 55-64	18.0%	16.1%	111
HOH Age 65+	19.7%	31.7%	62
HOH Male	49.9%	46.5%	107
HOH Female	50.1%	53.5%	94
TV Sets = 1	21.5%	32.7%	66
TV Sets = 2	32.8%	36.6%	90
TV Sets = 3	24.8%	20.0%	124
TV Sets = 4-10	20.9%	10.6%	196
DVR Homes	29.4%	11.6%	254
Non-DVR Homes	70.6%	88.4%	80
Video Game Owners	39.1%	25.3%	155
Home Owner	69.4%	55.1%	126
Home Renter	30.6%	44.9%	68
2nd Home Owner	4.1%	2.8%	149
Single Family Home	73.8%	60.8%	121
Multi-Family Home	20.5%	27.9%	73
Mobile Home	5.8%	11.3%	51



**APPENDIX A**  
**Nielsen National People Meter Sample Characteristics of**  
**Homes Without Internet Access**  
**(continued)**  
**December 8-14, 2008**

Demographic Break	% of Total US (Daily Scaled Installed)	% of Non- accessible Universe.	Index
HH Income <\$25K	20.0%	45.5%	44
HH Income \$25-50K	28.0%	35.0%	80
HH Income \$50-74K	21.2%	13.3%	159
HH Income \$75-99K	13.8%	3.6%	381
HH Income \$100-125K	7.3%	1.2%	608
HH Income \$125K+	9.7%	1.3%	723
Blue Collar HOH	26.6%	34.3%	77
White Collar HOH	43.4%	22.8%	190
Skilled HOH	9.3%	10.2%	91
Unskilled HOH	16.6%	23.0%	72
NILF HOH	30.0%	42.9%	70
HOH 1-3 Yrs HS	6.8%	15.9%	43
HOH HS Grad	22.5%	34.3%	66
HOH 1-3 Yrs College	34.7%	29.3%	118
HOH 4+ Yrs College	32.7%	12.0%	273
COUNTY SIZE A	39.2%	31.4%	125
COUNTY SIZE B	31.2%	30.1%	104
COUNTY SIZE C	14.9%	17.2%	87
COUNTY SIZE D	14.7%	21.3%	69
METERED MARKET	69.7%	61.3%	114
NON-METERED MARKET	30.3%	38.7%	78