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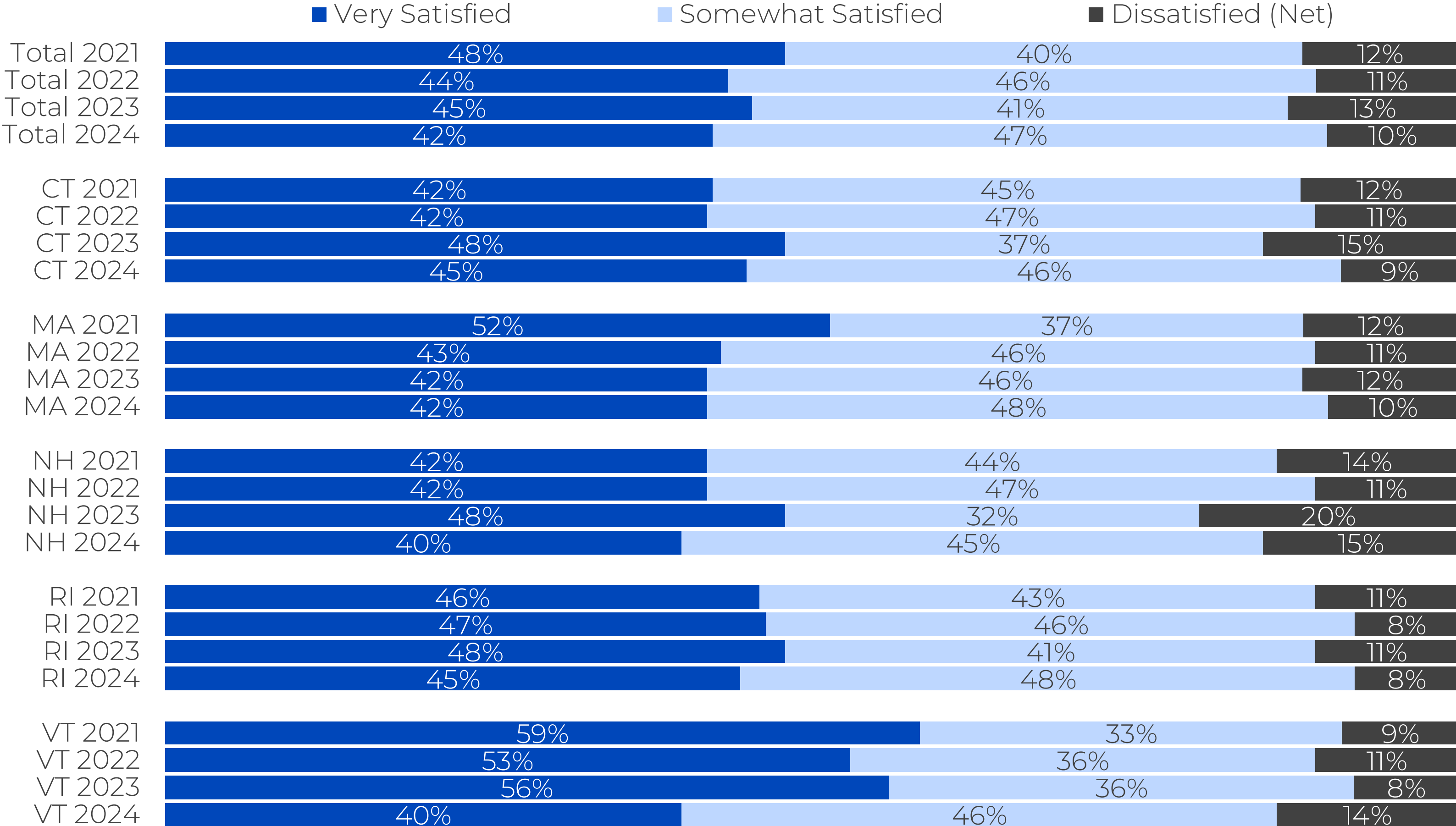
BROADBAND SERVICE

USAGE TRENDS & CONSUMER PERCEPTIONS

The logo for NECTA, consisting of a solid blue circle with the word "NECTA" written in white, uppercase, sans-serif font in the center.

NECTA

HIGH LEVELS OF SATISFACTION IN ISPS.



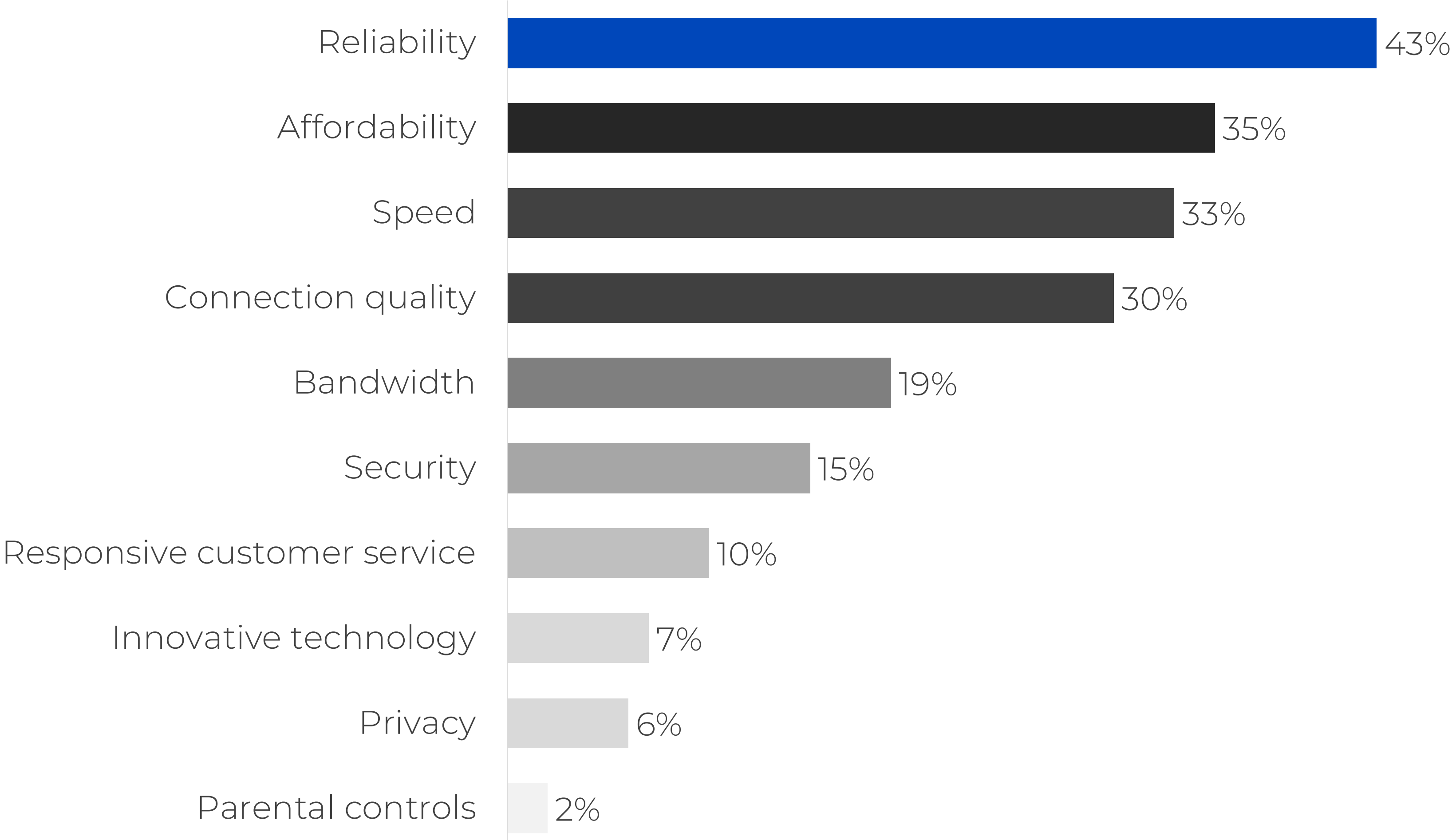
QUESTION:

How satisfied would you say that you are with your home internet service?

(Asked only of those who indicated that they have home internet service.)

RELIABILITY IS THE THE TOP PRIORITY.

This is followed by affordability and speed.



QUESTION:

Which of the following attributes of home internet service is the most important to you?

(Top two choices combined. Asked only of those who indicated that they have home internet service.)

CUSTOMERS ARE VERY SATISFIED.

Satisfaction has remained steady with their top priority: reliability.

While satisfaction has improved, nearly half are still dissatisfied with their second-most important priority: affordability.

QUESTION:

How satisfied or dissatisfied are you with the following attributes of your internet service?

(Asked only of those who indicated that they have home internet service.)



Reliability



Speed



Connection Quality



Bandwidth



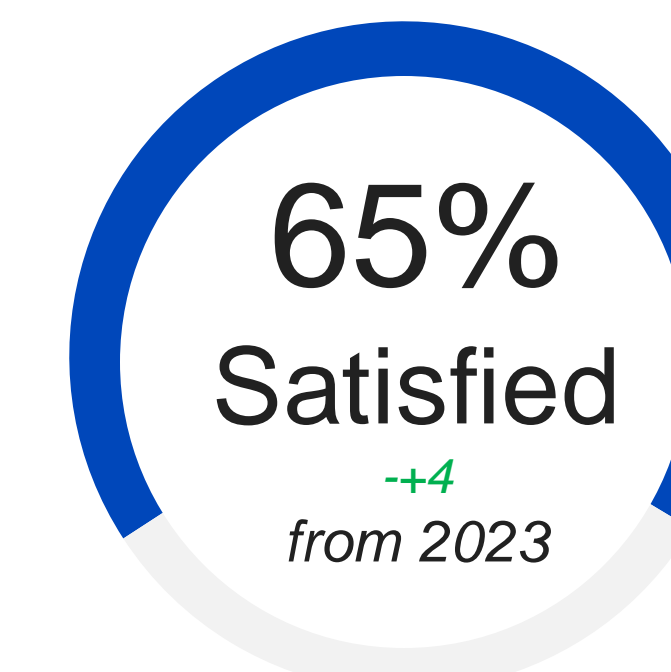
Security



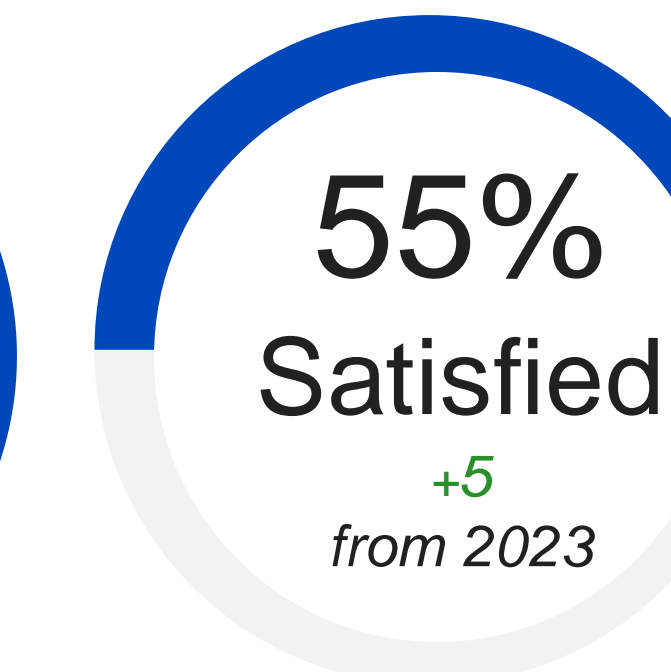
Privacy



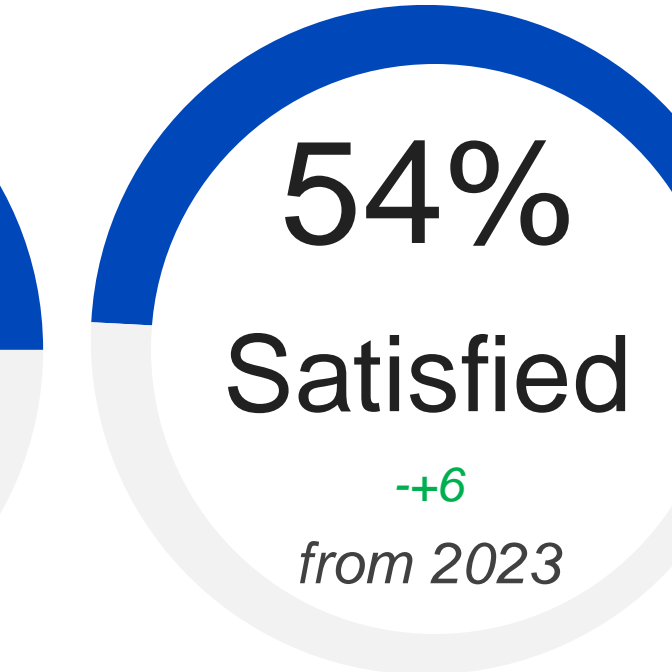
Innovative Technology



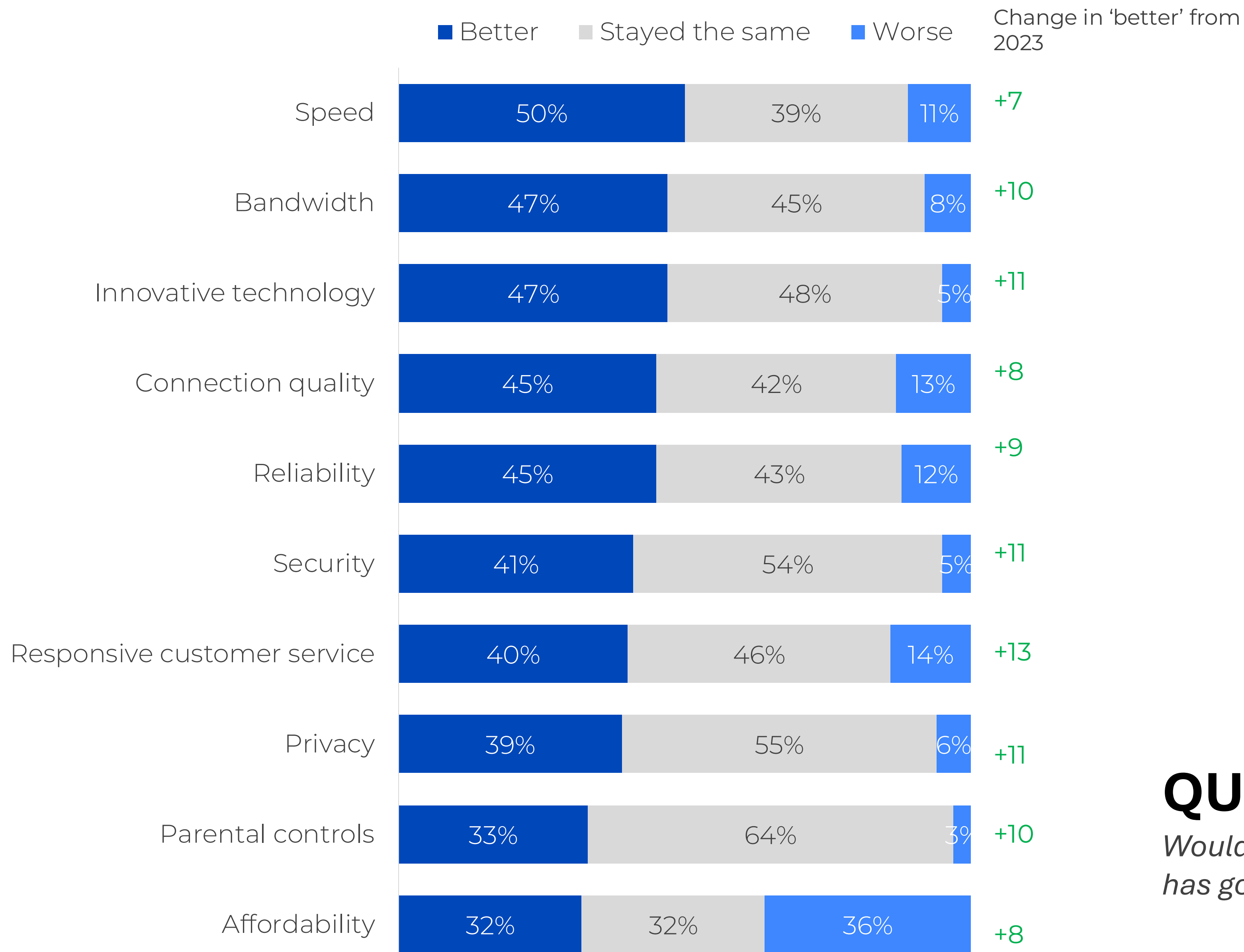
Responsive Customer Service



Affordability



Parental Controls



NOTICABLE IMPROVEMENTS IN

ALL

SERVICES


Consumers note improvement over the past year – even with affordability.

QUESTION:

Would you say that the ____ of your home internet service has gotten better or worse over the past two years?

INTERNET ACCESS

CONSUMER PERCEPTIONS OF THE DIGITAL DIVIDE

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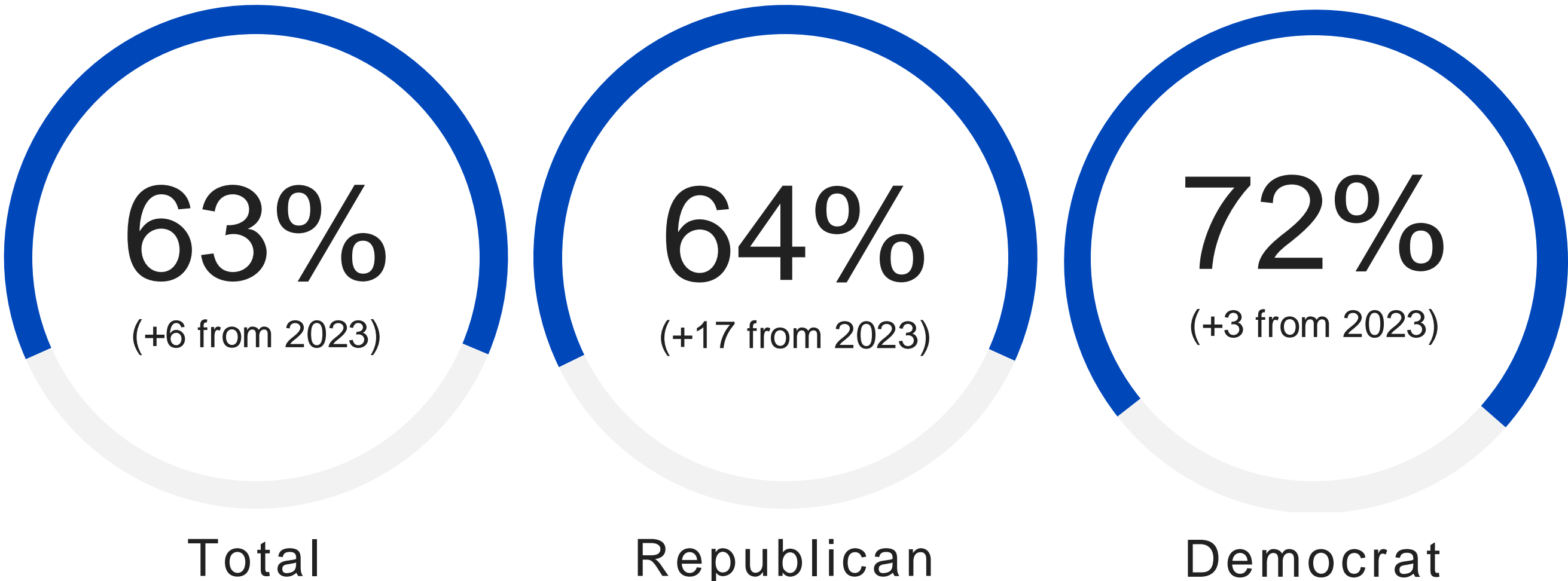
INTERNET ACCESS IS A RIGHT AND MORE PEOPLE WILL PAY.

The belief that internet service is a right has increased over the past year – and the willingness to pay to ensure everyone has that access has **DRAMATICALLY** increased. This is driven largely by Republicans.

QUESTION:

Do you consider internet access to be a “right”?

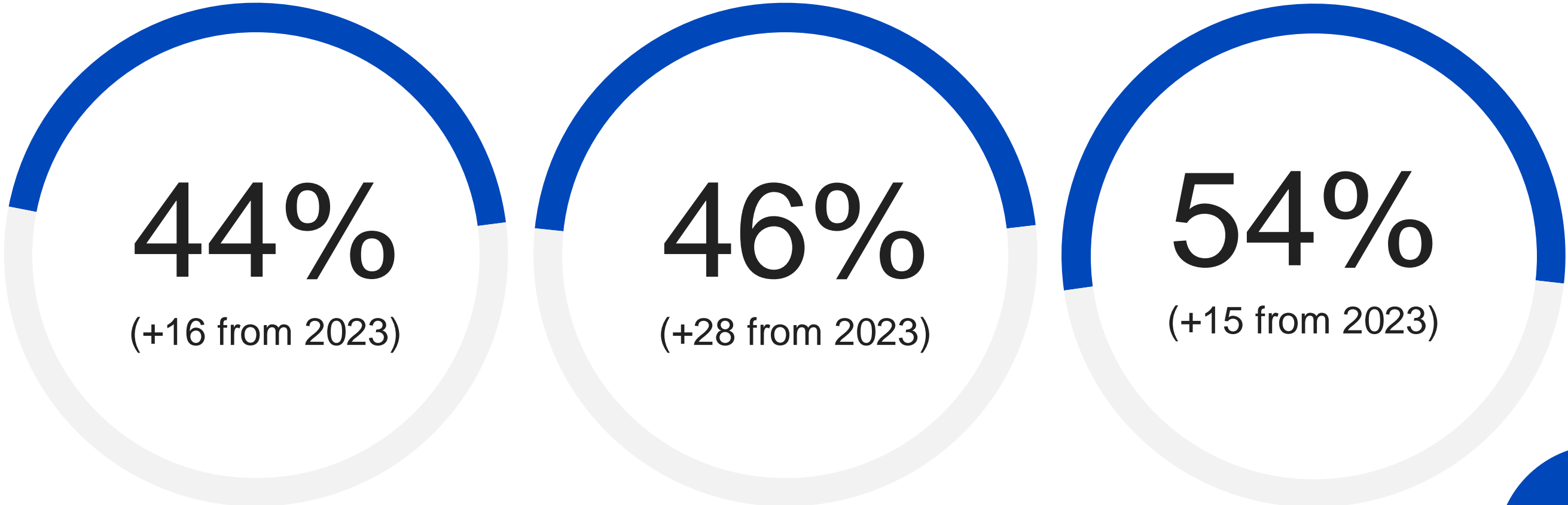
(Graphs display “yes” answers.)



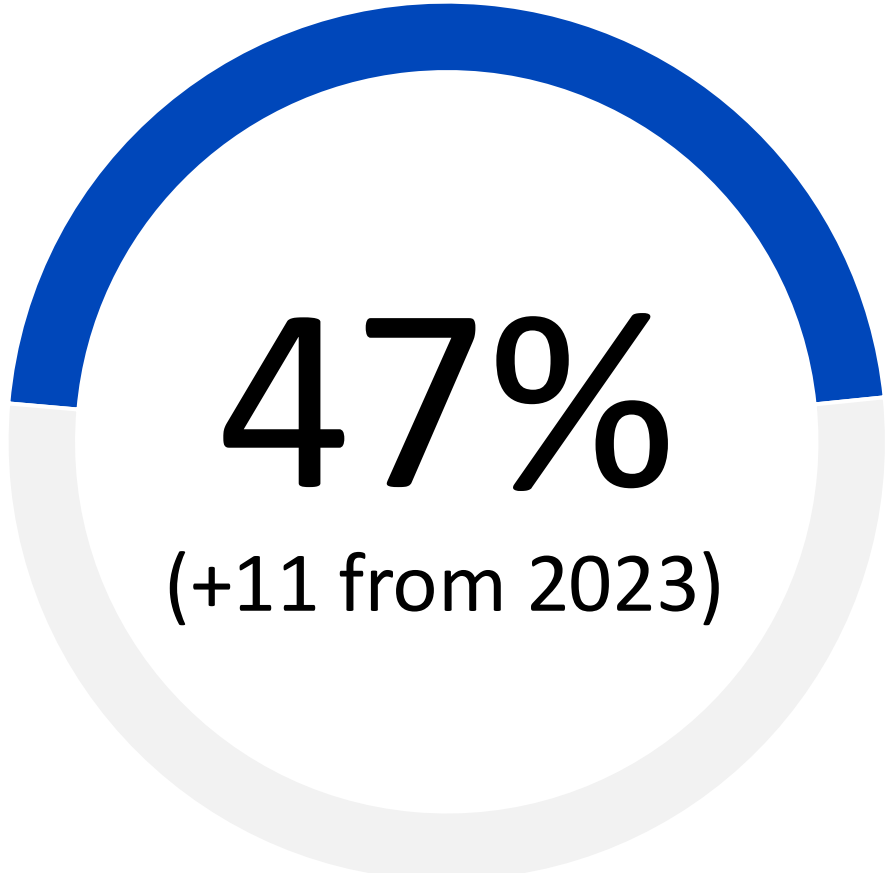
QUESTION:

Would you be willing to pay more on your monthly bill to ensure everyone has internet access?

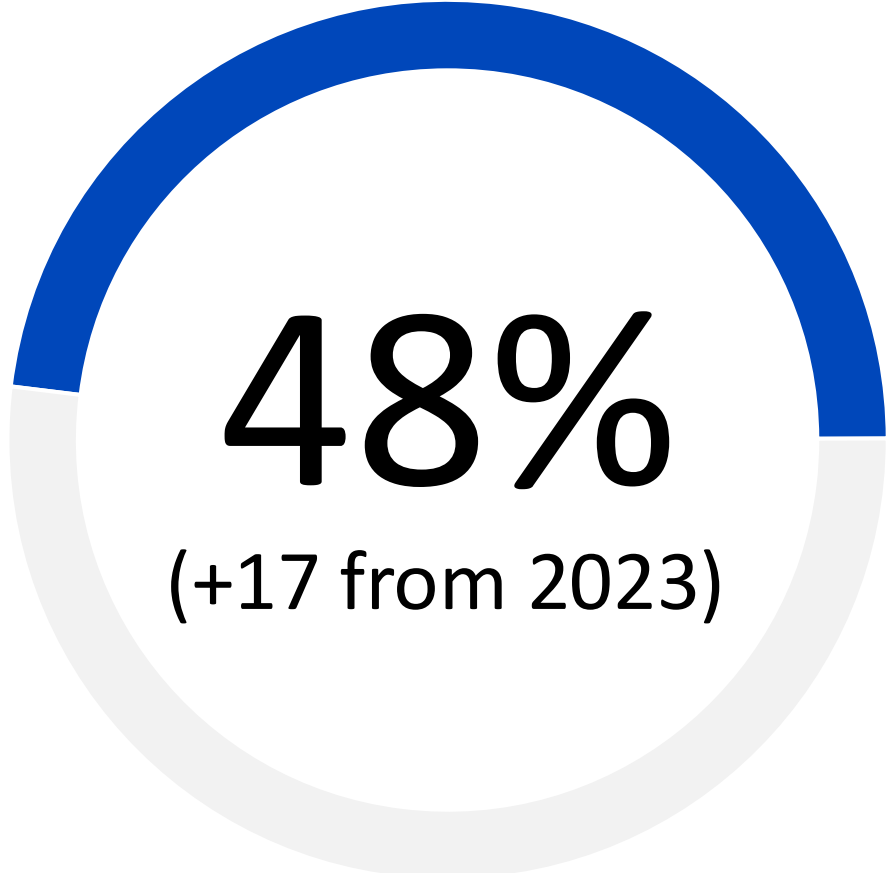
(Graphs display “yes” answers.)



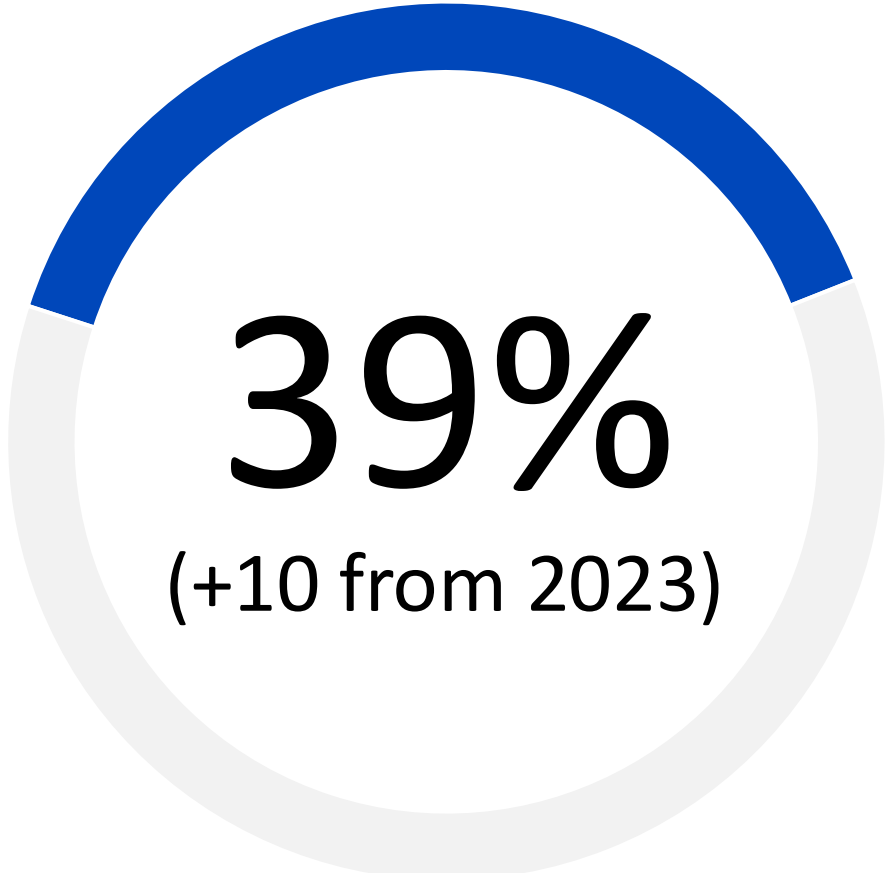
INCREASE IN AWARENESS OF AFFORDABILITY PROGRAMS.



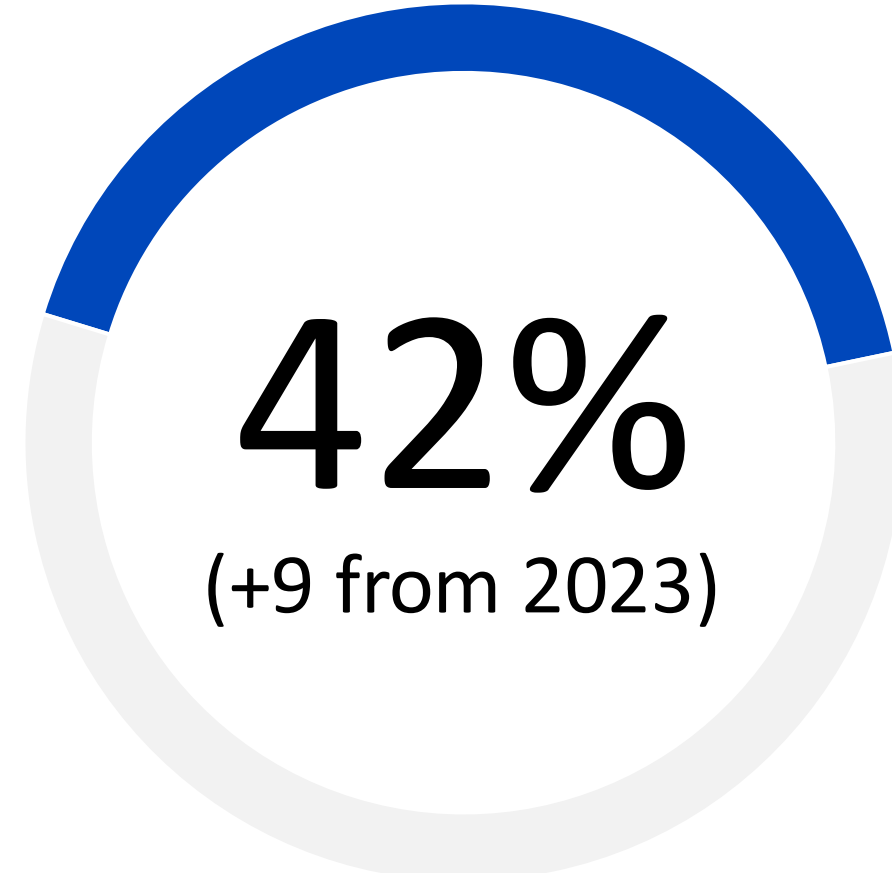
Comcast Internet Essentials



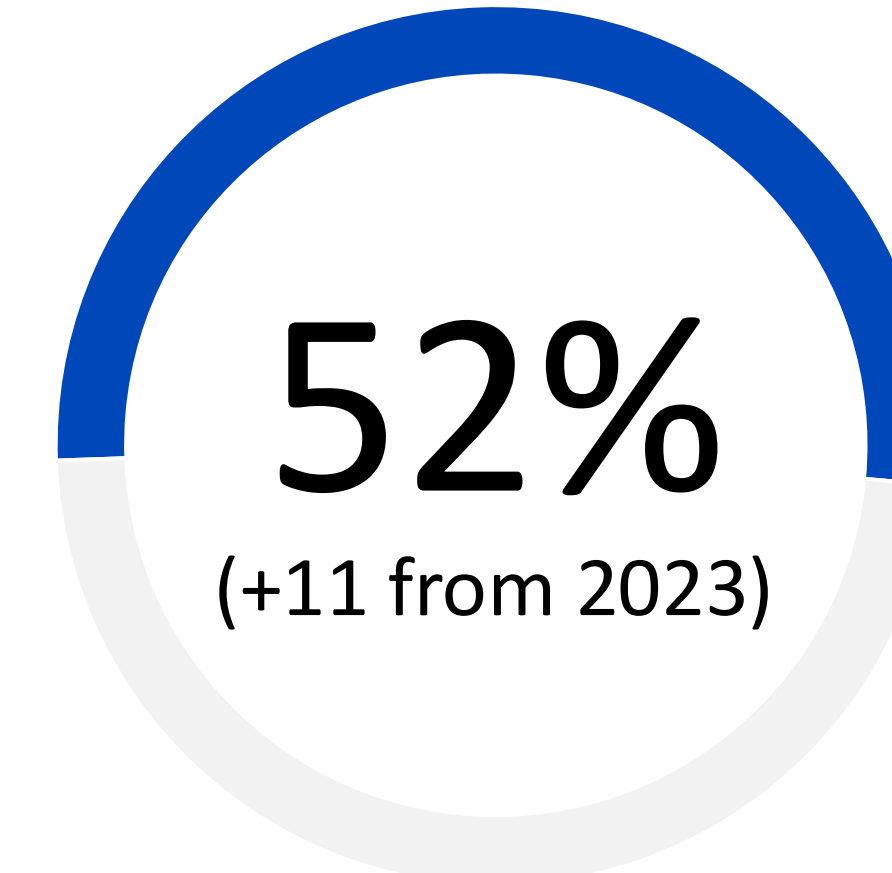
Cox Connect2Compete



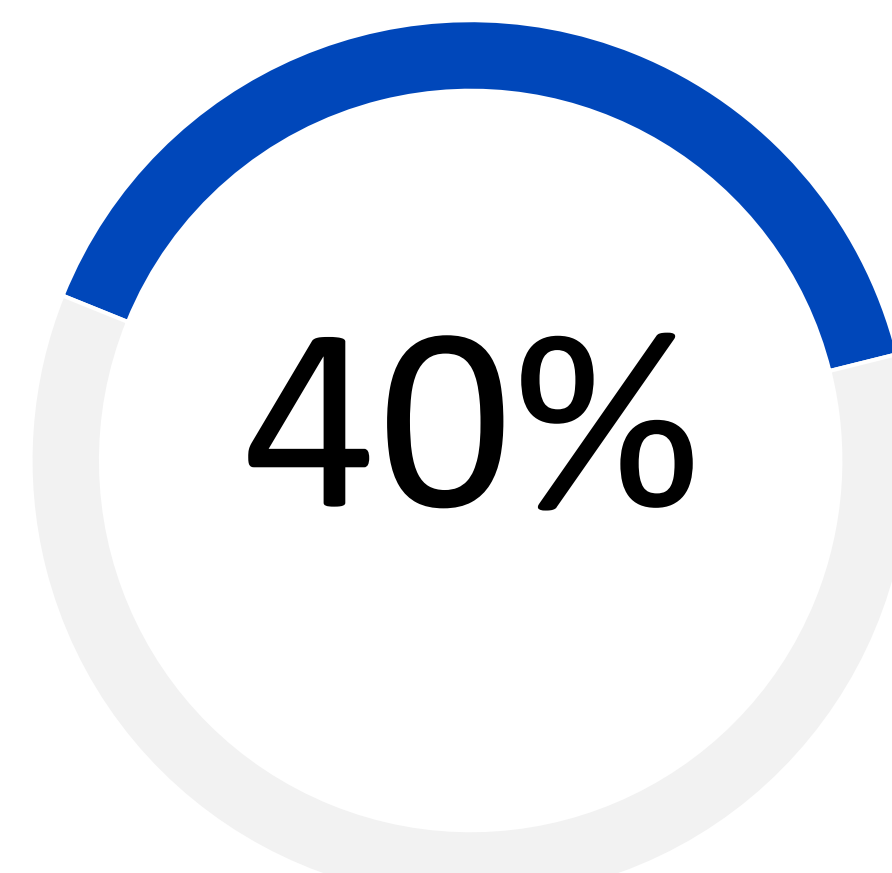
Charter Spectrum Internet Assist



Breezeline Internet Assist Program



The FCC's Affordable Connectivity Program



The FCC's Lifeline Program


QUESTION:

Are you aware of the following programs designed to make broadband access more affordable?

(Graphs show responses of "Aware".)

MUNICIPAL NETWORKS

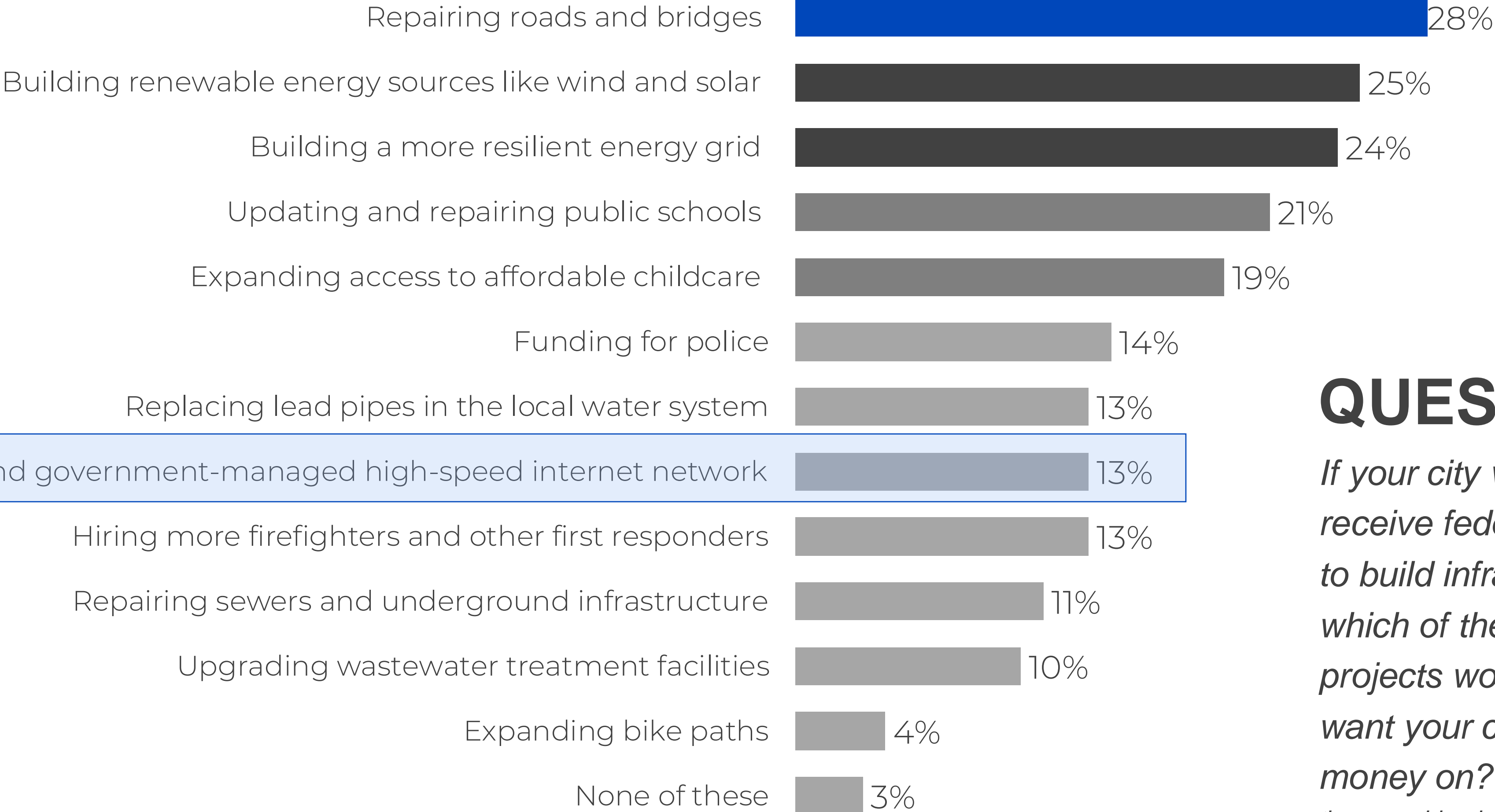
WHO DO CONSUMERS TRUST TO CONSTRUCT AND MAINTAIN RELIABLE NETWORKS?

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MUNICIPAL NETWORKS AREN'T A PRIORITY FOR VOTERS.

There are far more advantageous uses of federal funding than to construct and maintain a municipal broadband network. New Englanders much prefer creating physical infrastructure or renewable and resilient energy.



QUESTION:

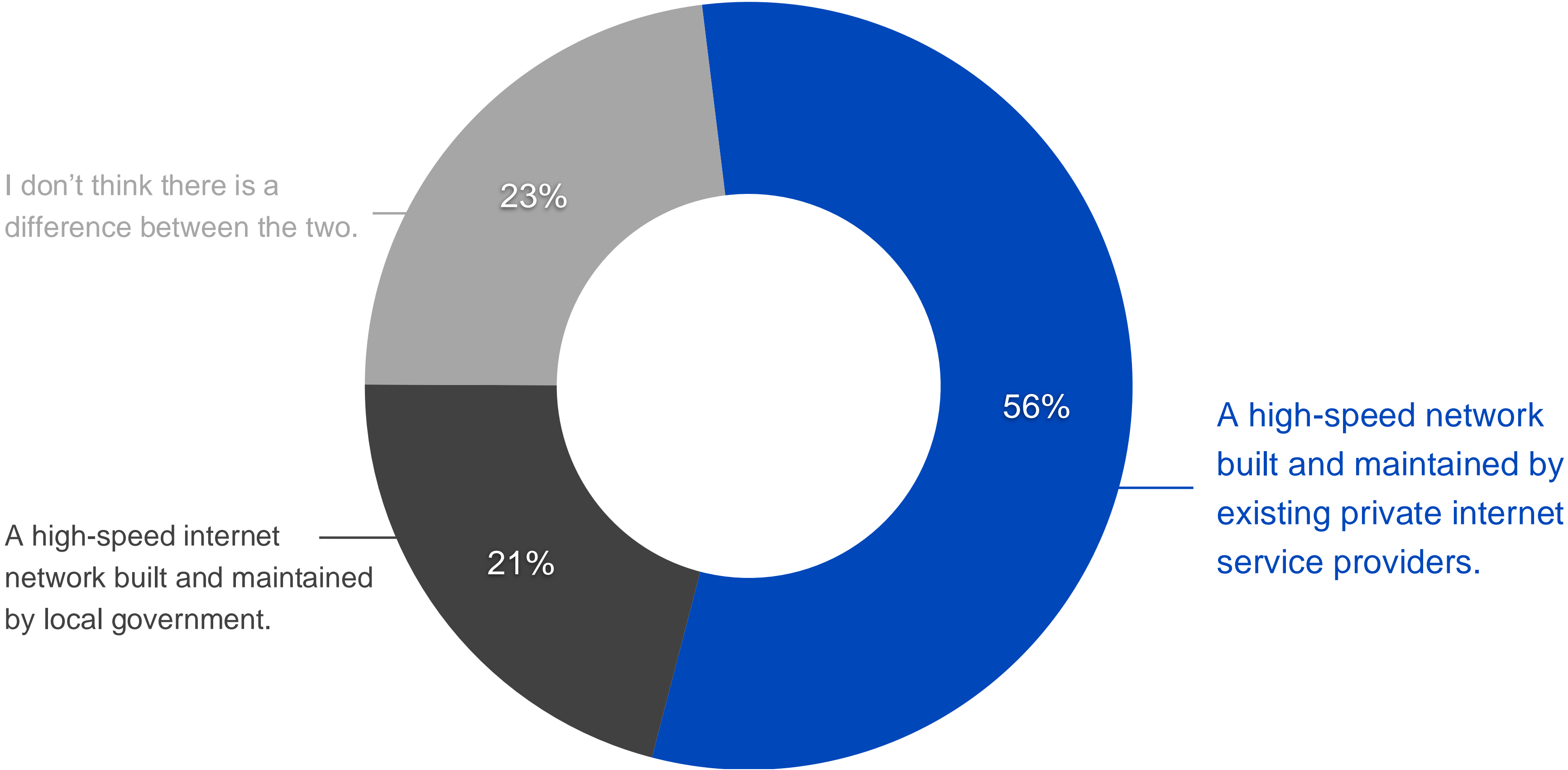
If your city were to receive federal funding to build infrastructure, which of the following projects would you most want your city to spend money on? (Showing top three combined choices.)

CONSUMERS TRUST PRIVATE ISPs MORE FOR HOME USE.

Only a quarter would trust a GON more.

QUESTION:

Which type of broadband network would you trust more to use in your own home?

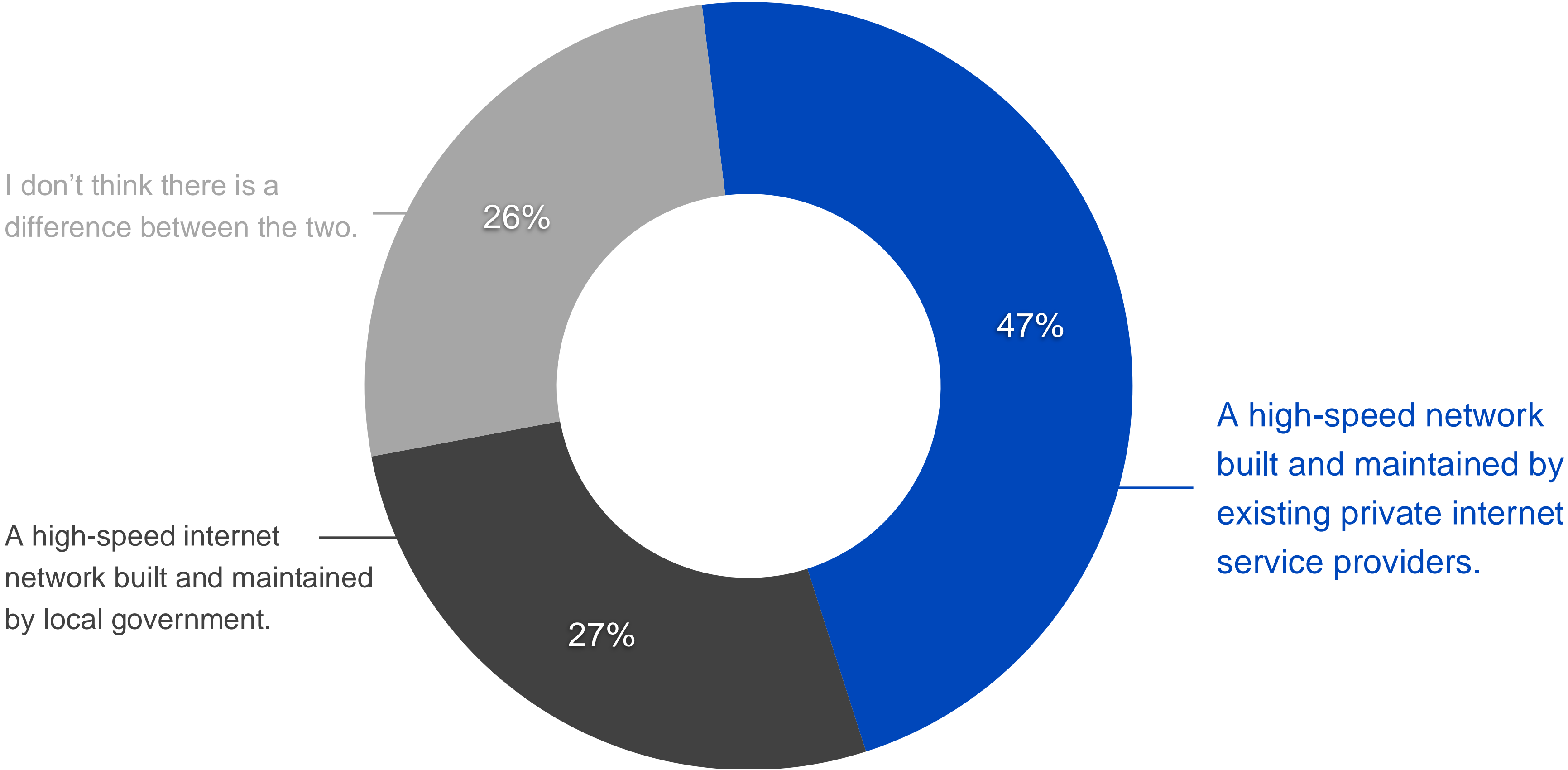


CONSUMERS TRUST PRIVATE ISPs FOR AI PROTECTION.

Only a quarter would trust a GON more.

QUESTION:

Which type of broadband network would you trust more to protect you against threats from AI?



CABLE VIDEO SERVICE

USAGE TRENDS & CONSUMER PERCEPTIONS

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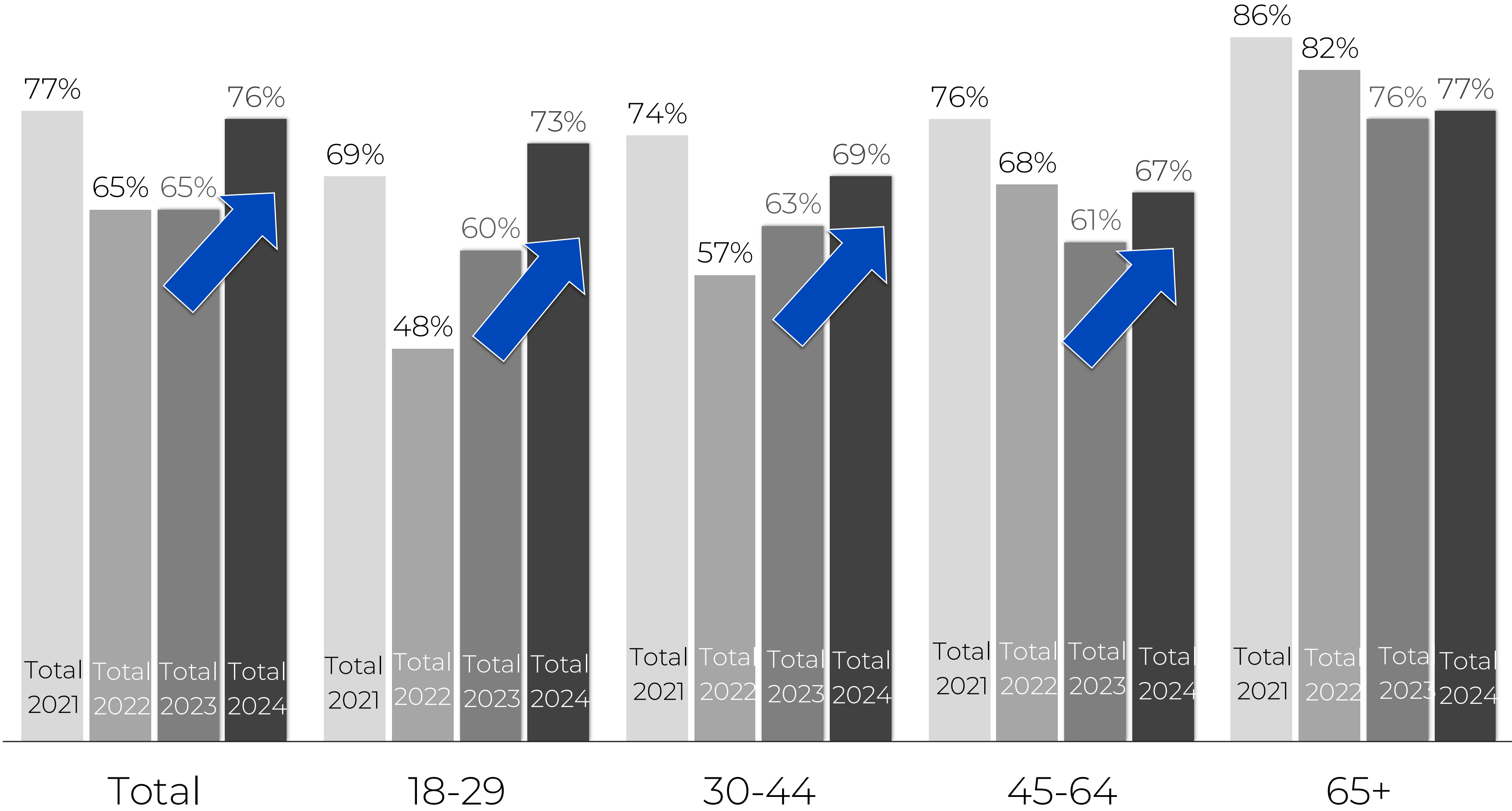
NECTA

SUBSCRIPTIONS ARE UP WITH CONSUMERS UNDER 65.

Compared to trended data from last year, subscriptions are up overall – driven by younger consumers.

QUESTION:

Do you currently subscribe to a cable or satellite television service that uses a set-top box with a channel guide?
 (Showing “Yes” responses only.)



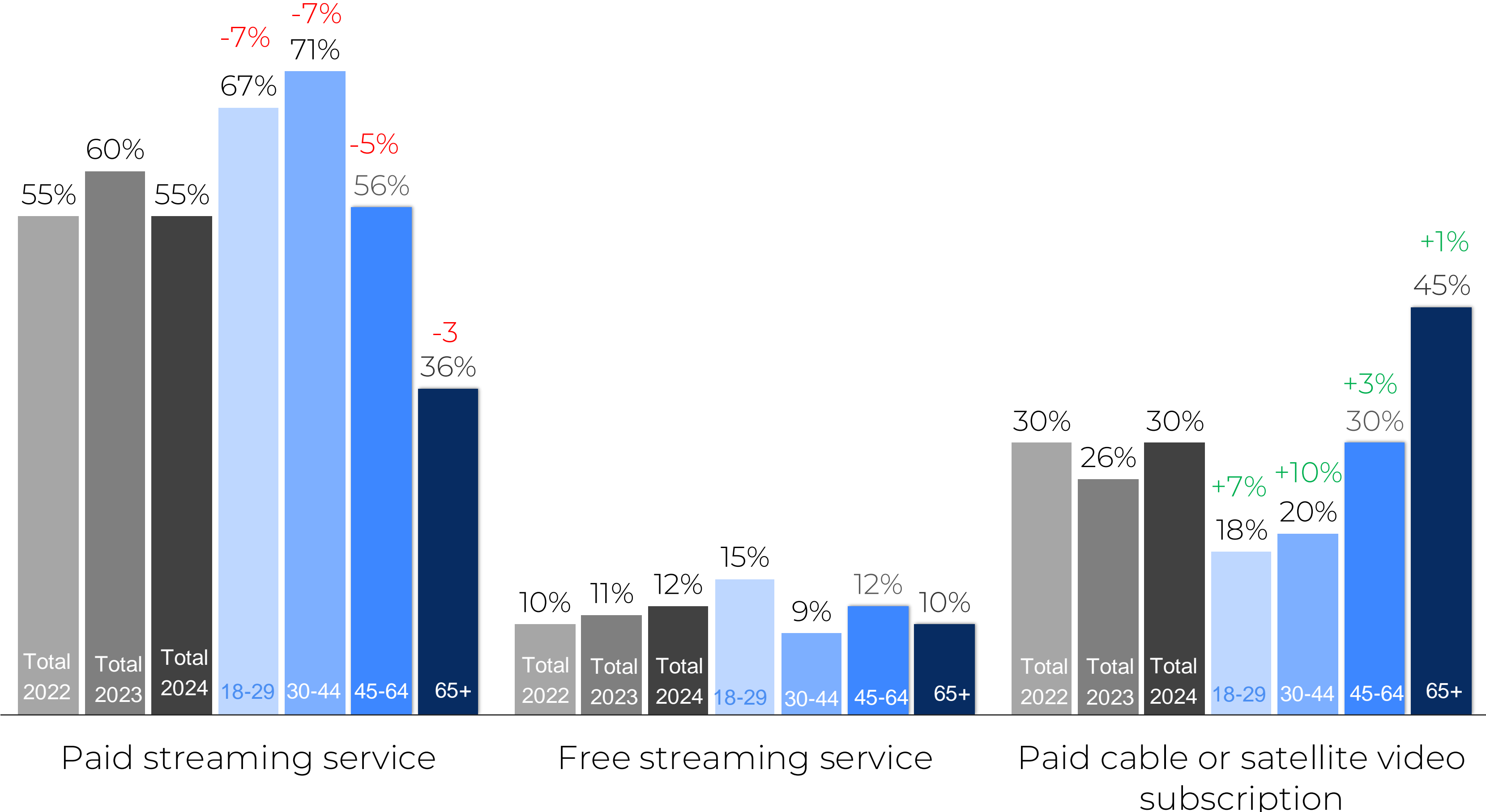
CABLE IS REBOUNDED...DRIVEN BY YOUNGER CONSUMERS.

All consumers have decreased their use of paid streaming and increased their use of paid cable or satellite packages.

QUESTION:

Overall, which type of video service do you use most frequently to watch shows and movies?

(Asked only of those with a current cable or satellite video subscription. Responses of "Don't know" not shown.)

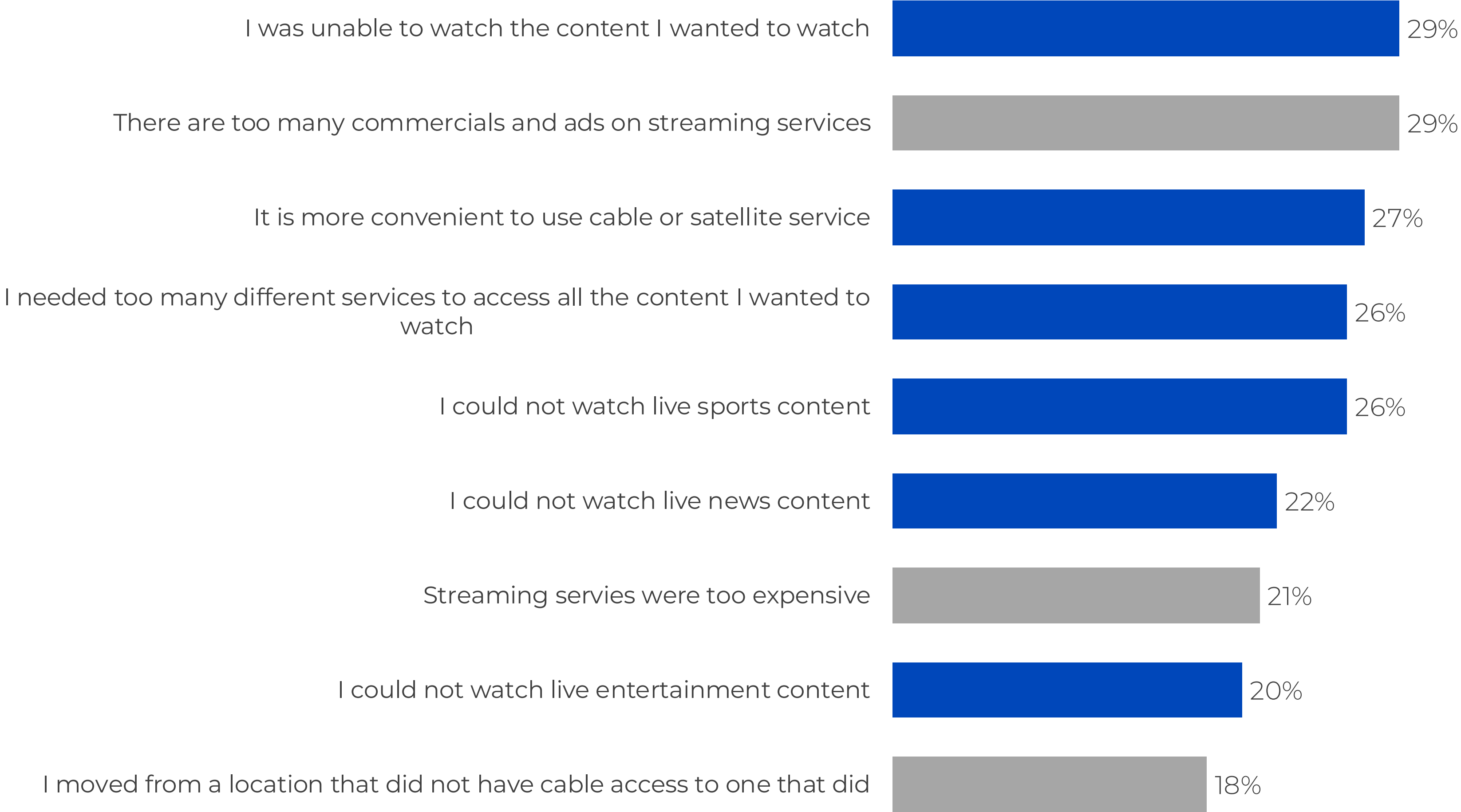


CONTENT AND CONVENIENCE ARE KEY TO “UN-CUTTERS.”

Price is a secondary driver.


QUESTION:

Why did you return to cable or satellite providers for video service? Please select all that apply. (Asked only of those who indicated that they currently subscribe to a cable or satellite television service that uses a set-top box with a channel guide but are former cord cutters.)



AI

USAGE TRENDS & CONSUMER PERCEPTIONS

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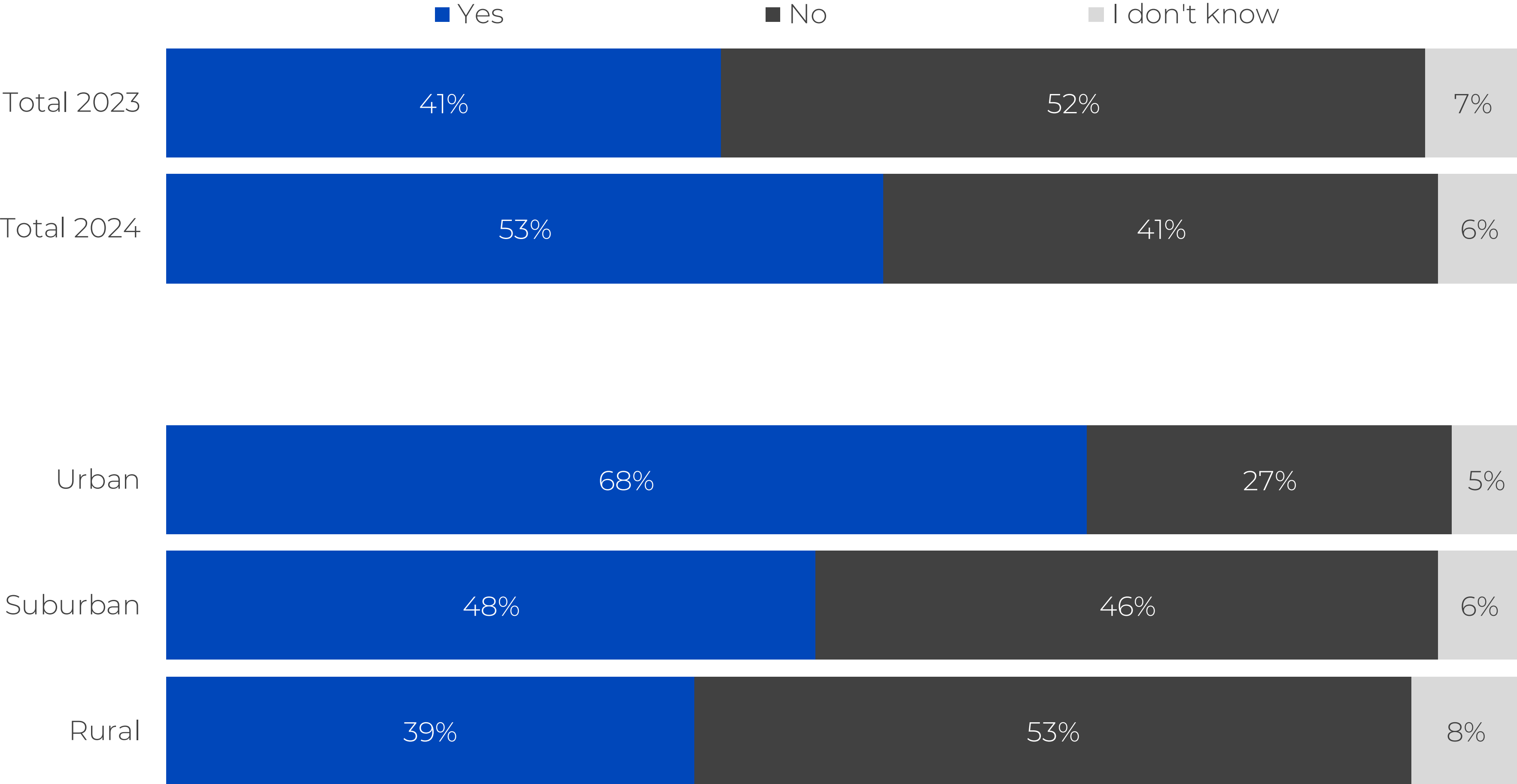
NECTA

MAJORITY HAVE USED AN AI CHATBOT.

Urban consumers are much more likely to have used an AI chatbot than those in rural or suburban areas.

QUESTION:

Have you ever used a generative artificial intelligence (AI) chatbot such as ChatGPT, Microsoft Bing, or Google Bard?



AI IS MOST USED AS AN INTERNET SEARCH TOOL.

This is followed by generating research and bolstering personal productivity.



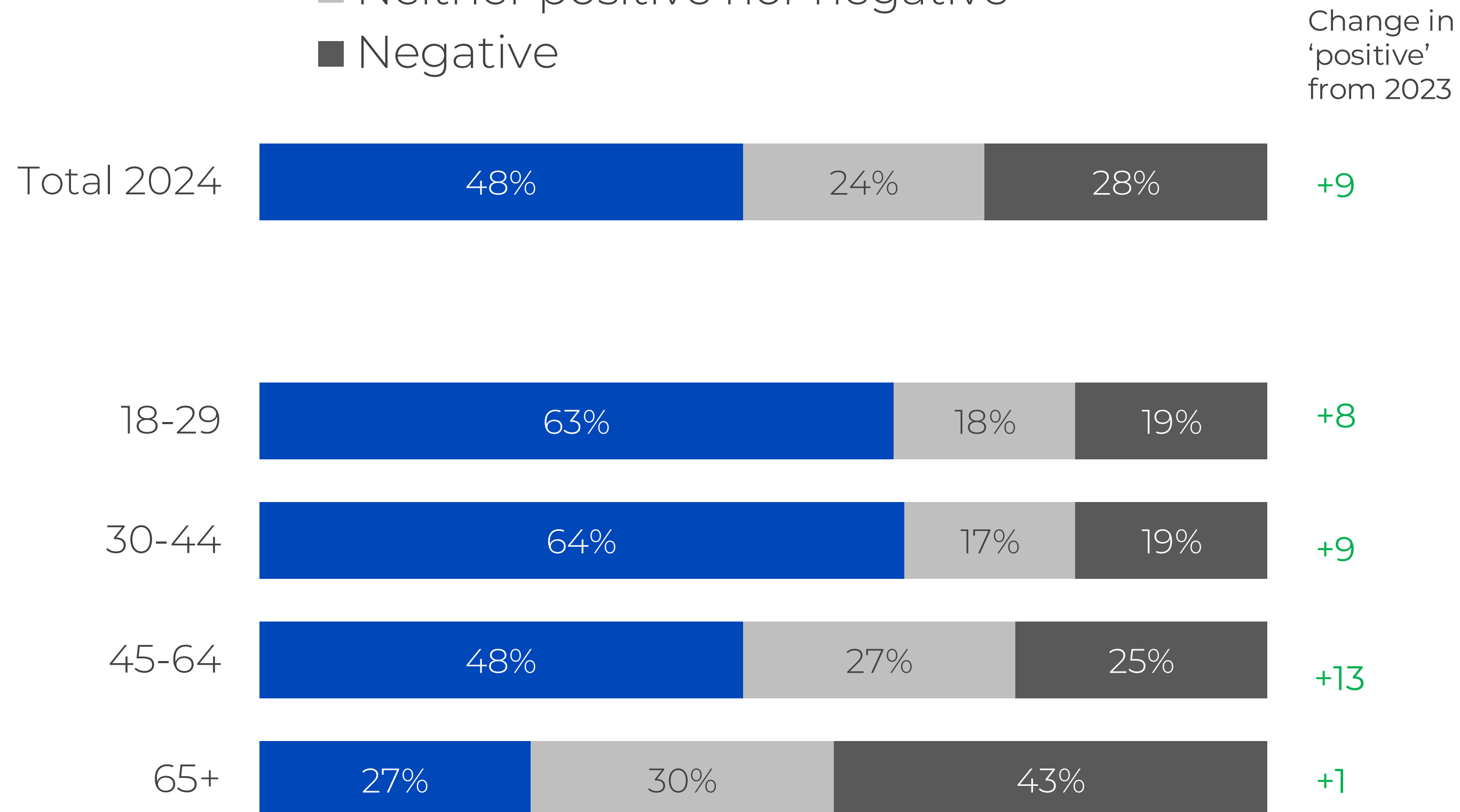
QUESTION:

What do you use AI most for? (Top two uses combined. Asked only of those who indicated they have used AI before.)

QUESTION:

Do you think artificial intelligence chatbots like ChatGPT, Microsoft Bing, or Google Bard have an overall positive or negative impact?

- Positive
- Neither positive nor negative
- Negative



CONSUMERS BECOMING MORE COMFORTABLE WITH AI.

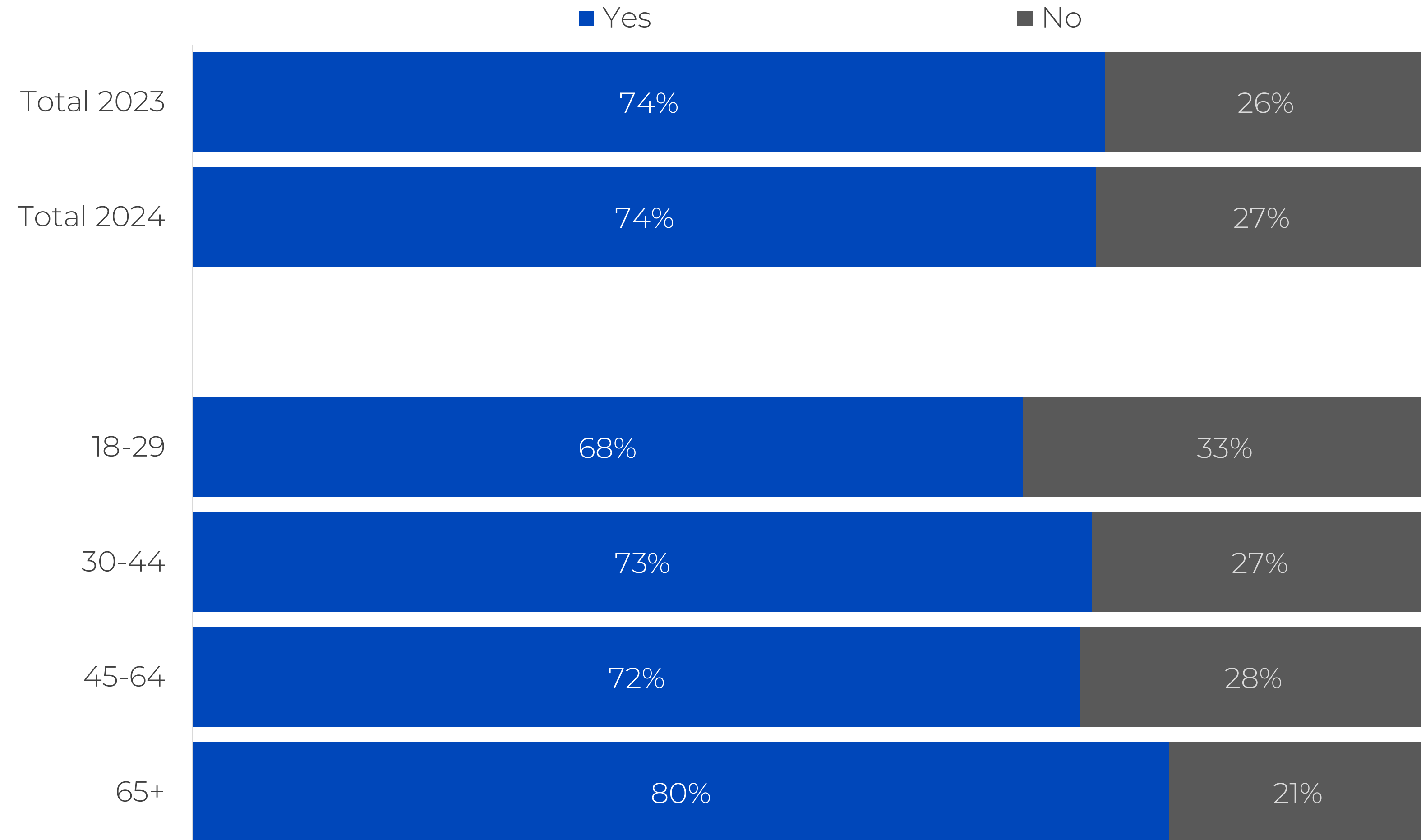
Consumers under 45 are optimistic about AI's overall impact, and those 45-65 are moving in that direction.

3/4 BELIEVE AI POSES A THREAT TO SECURITY.

This belief extends to all age groups and has remained steady over the past year.

QUESTION:

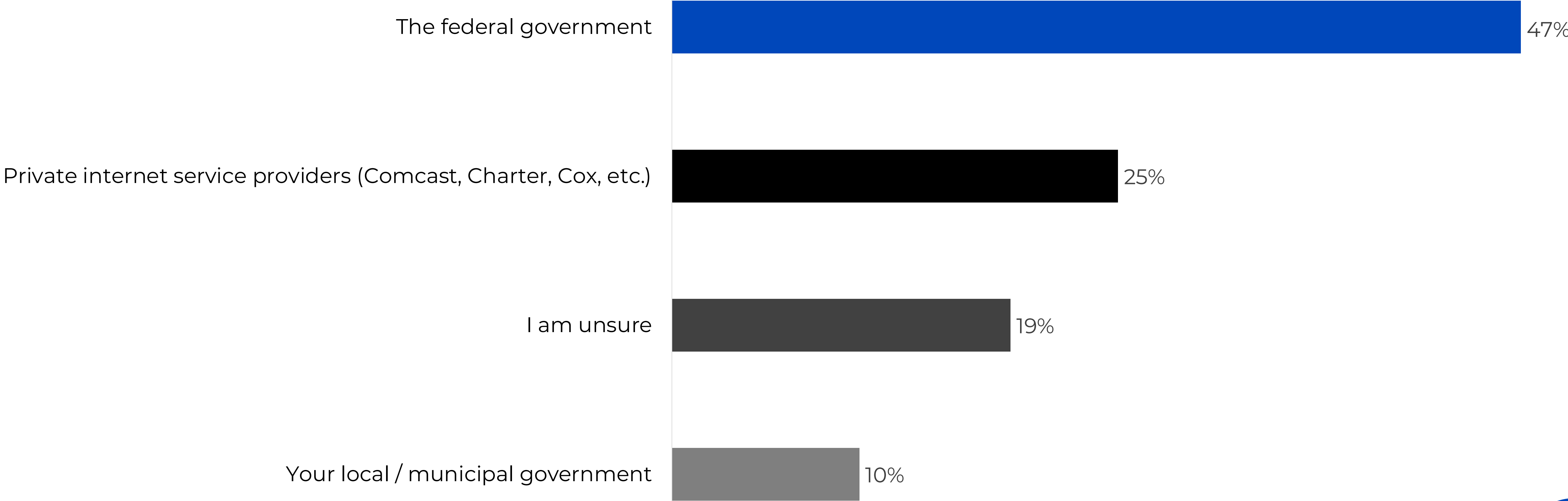
Do you believe that artificial intelligence poses a threat to your online security?



FEDERAL GOVERNMENT BEST EQUIPPED TO REGULATE AI.

QUESTION:

What group is best equipped to regulate Artificial Intelligence (AI) in general?



SECURITY

CONSUMER PERCEPTIONS OF ONLINE SAFETY

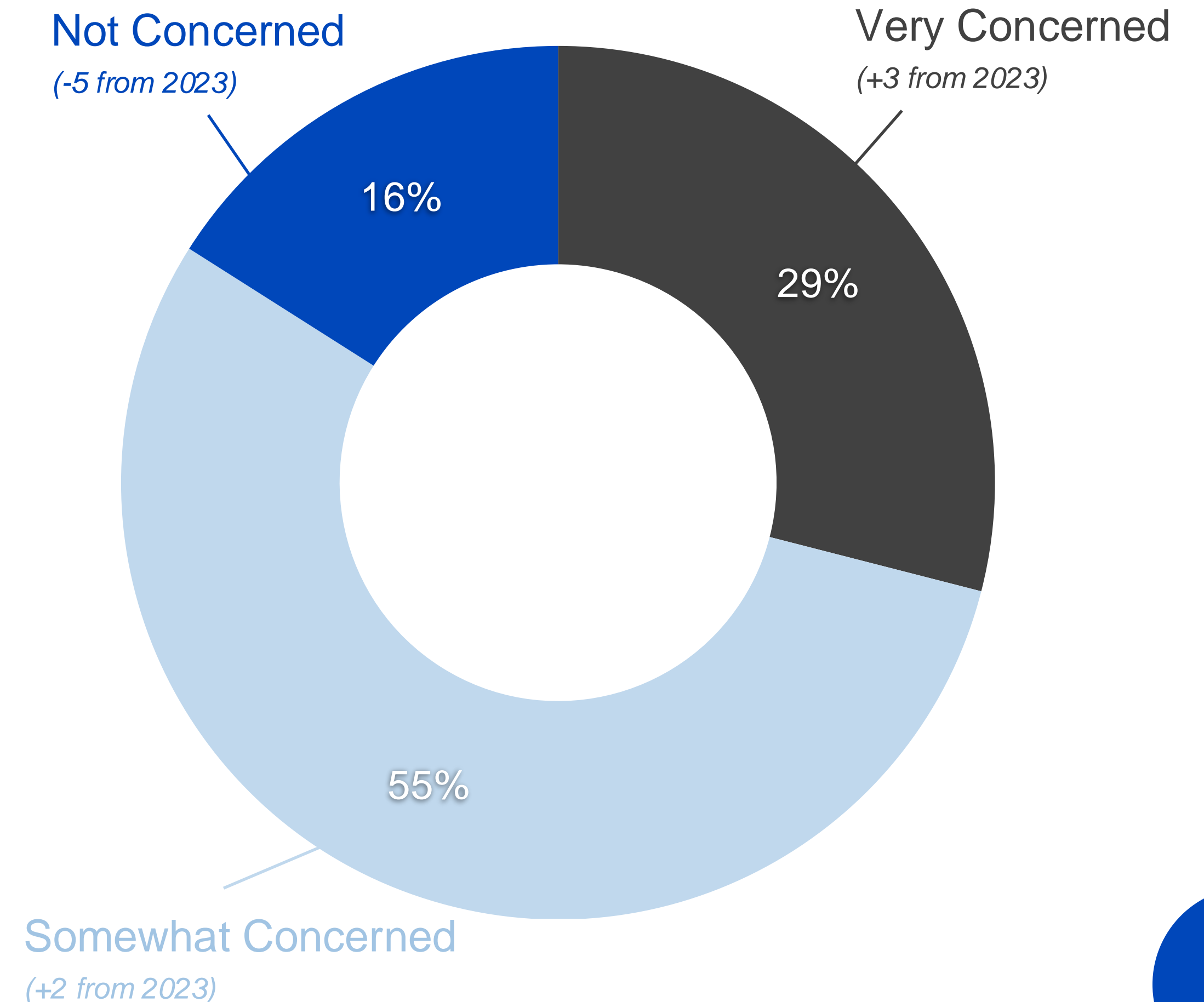


MAJORITY ARE AT LEAST SOMEWHAT CONCERNED ABOUT CYBERATTACKS.

Intense concern is trending slightly up.

QUESTION:

What is your level of concern about the possibility of cyberattack disrupting your broadband service?

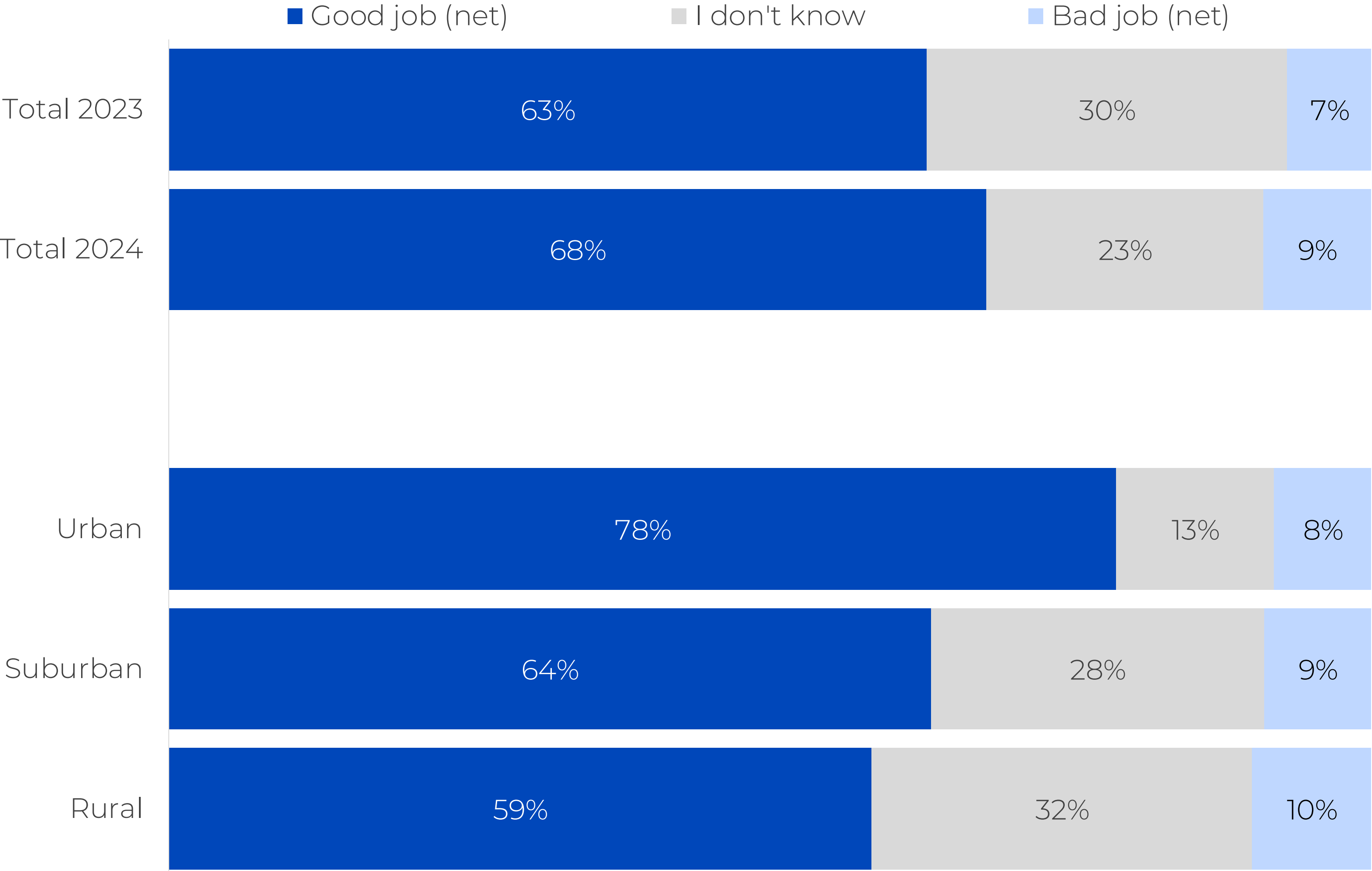


MAJORITY BELIEVE ISPS DO A GOOD JOB ON SECURITY.

Urban consumers are more aware of the role ISPs play in protecting them from cyberattacks than suburban or rural consumers are.

QUESTION:

Does your Internet Service Provider do a good job or a bad job of protecting you from cyberattacks?



Methodology



QUANTITATIVE: NEW ENGLAND VOTER SAMPLE BREAKDOWN: N=2000

(N=2000 | Fielded 10/7/2024 to 10/16/2024 | M.o.E +/- 2.2%)

