

# VERIZON FiOS INNOVATION INDEX

December 2012

## WHO ARE THE BORDERLESS CONSUMERS?

Borderless consumers are an important and rapidly growing segment, almost 40 percent of U.S. adults. These consumers use several devices and require connectivity, flexibility and choice whenever and wherever possible. They are defined as consumers who own a laptop or desktop, own a smartphone or tablet, have an Internet-enabled device at all times, are motivated to make technology and connectivity upgrades and are interested in the benefits of a connected home.



## SMART HOME ACTIVITIES

### Borderless Lifestyle Survey



## WHAT CONNECTED ACTIVITIES DO CONSUMERS ENGAGE IN AT HOME?

### ALL CONSUMERS



### BORDERLESS CONSUMERS

	BORDERLESS CONSUMERS	NON-BORDERLESS CONSUMERS
Bank online	86%	67%
Play video games	60%	48%
Watch online videos (e.g., YouTube, Vimeo, or Daily Motion)	84%	66%
Stream movies or TV shows (e.g., Netflix, Hulu, or FiOS Flex View)	63%	44%
Shop online	91%	78%
Access my work email from outside the office	57%	40%
Access the network at my place of employment	42%	28%
Utilize other work-related services or websites	43%	31%
Store/ Share photos online	77%	56%
Access my personal email	95%	92%
Read social media posts	77%	58%
Access health and fitness information online	61%	55%
Video calls or chatting (e.g., Skype)	43%	25%
Conference calls	20%	11%

Methodology: Results are based on five surveys conducted online by Harris Interactive on behalf of Verizon from among U.S. adults ages 18 and older (Sept-Nov, 2012). Each survey had a minimum of 2,000 respondents but are not based on probability samples and therefore no estimate of theoretical sampling error are calculated.



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## SMART HOME ACTIVITIES

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### INTEREST IN REMOTE HEALTH OPTIONS

#### ALL CONSUMERS



**59%**  
Manage illness for children/elderly



**63%**  
Monitor health of homebound children/elderly



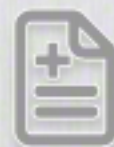
**54%**  
Virtual doctor house calls via videoconference



**67%**  
Direct online access to medical professionals



**59%**  
Online health and wellness monitoring devices



**60%**  
Wellness check-ins and monitoring from home

#### BORDERLESS CONSUMERS

	BORDERLESS CONSUMERS	NON-BORDERLESS CONSUMERS
Manage illness for children/elderly	73%	54%
Monitor health of homebound children/elderly	79%	57%
Virtual doctor house calls via videoconference	69%	47%
Direct online access to medical professionals	81%	61%
Online health and wellness monitoring devices	74%	53%
Wellness check-ins and monitoring from home	74%	54%

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## SMART HOME ACTIVITIES

### Borderless Lifestyle Survey



### WHY DO PEOPLE WANT EVEN MORE SPEED?

#### ALL CONSUMERS



**31%**  
Connect with friends/family



**24%**  
Connect with the world outside the home



**19%**  
Meet the needs of my spouse/significant other



**19%**  
Work related needs and demands



**19%**  
Connected appliances and home services



**19%**  
More connectivity equates to more convenience



**13%**  
Try new high-speed based products and services



**11%**  
Interests, needs and demands of my children



**10%**  
Richer media experiences

#### BORDERLESS CONSUMERS

	BORDERLESS CONSUMERS	NON-BORDERLESS CONSUMERS
Connect with friends/family	41%	25%
Connect with the world outside the home	31%	20%
Meet the needs of my spouse/significant other	30%	12%
Work related needs and demands	24%	16%
Connected appliances and home services	24%	16%
More connectivity equates to more convenience	27%	14%
Try new high-speed based products and services	23%	6%
Interests, needs and demands of my children	16%	8%
Richer media experiences	13%	8%

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