



**Summary of the Findings
From the 2018
CETF Follow-up Survey**

for the

*California Emerging
Technology Fund*

June 2018

Table of Contents

Introduction	3
Findings in Brief	4
Summary of the Findings	6
1. Changes in access to broadband Internet among households re-interviewed in June 2018 compared what was reported in June 2017	7
2. Length of time household has had access to high speed Internet.	8
3. Households connected only through a smartphone that are limited in the amount of data they can download each month	9
4. Proportion of households under-connected or not connected to the Internet who feel they are at a disadvantage when trying to perform various activities	10
5. Reasons given for not having access to the Internet at home	11
6. Awareness of a special discount program that Internet providers make available to low-income households that significantly reduces the cost of getting access to high speed Internet at home	12
7. Ways that households with broadband connectivity are using the Internet now compared to last year	13
8. How important is having access to the Internet at home to your overall quality of life (among those with access to the Internet through a computing device) ..	14
9. Perceived importance of Internet access through a computing device to your overall quality of life (among those under-connected or not connected)	15
10. How important is it for the state of California to ensure that all California households have access to high speed Internet through a computing device ...	16
Appendices.	17
Survey questionnaire.	18
Pre-approach email invitation	24
Disposition of contact attempts	25

Introduction

This report provides a summary of the findings from a follow-up survey of Californians who agreed to be re-interviewed after completing the 2017 Digital Divide Survey. The survey was administered by telephone by Davis Research, LLC (Davis) on behalf of the California Emerging Technology Fund (CETF).

Interviewing for the follow-up survey was completed approximately one year after administration of CETF's 2017 Digital Divide Survey. Davis made every effort to administer the follow-up survey using the same interviewing procedures and staff that it used when administering data collection for the 2017 study.

Davis was responsible for completing all phases of the follow-up survey, including development of the survey questionnaire and pre-approach email, translation of these documents into Spanish, programming the English and Spanish questionnaires onto its computer-assisted telephone interviewing system, interviewer training, data collection, data processing, tabulation of the survey results, and the preparation of this summary report.

Prior to the start of data collection, eligible respondents who provided their email addresses at the conclusion of the 2017 Digital Divide Survey, were sent an email from CETF's Executive Director Sunne Wright McPeak, encouraging them to participate in the follow-up survey. Up to sixteen attempts were made to re-contact and interview each eligible respondent who were paid an incentive worth \$5 or \$10 upon completion of the survey.

A total of 546 telephone interviews were completed in English and Spanish as part of the 2018 CETF Follow-up Survey. This represents 51% of the 1,079 respondents who completed the 2017 Digital Divide Survey in those languages and gave their consent to be re-interviewed this year, and were therefor included in the follow-up survey's sample frame.

A disposition of the final outcome of all call attempts made to eligible respondents included in the follow-up survey can be found in the appendix section of this report, along with a hard-copy version of the questionnaire developed for the survey, and the pre-approach email that was forwarded to these respondents.

Findings in Brief

- Nearly all households (95%) who reported being connected to the Internet through a computing device such as a computer, laptop, or tablet in June 2017 and were re-interviewed this year say they continue to access the Internet from home in this way. Another 4% said they now have access only through a smartphone, while 1% no longer has broadband Internet connectivity at home.
- By comparison, about three in four of those under-connected or not connected to the Internet last year report no change in their household's Internet status this year. Of those who had access only through a smartphone, 22% say they migrated up and are now able to access the Internet through a computing device, while 4% no longer have access to the Internet at home. Of the households re-interviewed this year who reported not having broadband connectivity to the Internet last year, 21% can now connect to the Internet at home through a computing device, while another 4% now have access to the Internet but only through a smartphone.
- Greater than three in four of the households re-interviewed this year (78%) who can now access the Internet through a computing device have been online for six or more years. By contrast, just 17% of those whose only means of connecting to the Internet is currently through a smartphone have had Internet access for six or more years, while over half (52%) have had access for three years or less.
- Four in ten of the households (40%) who can only access the Internet at home through a smartphone say they are limited in the amount of data that they can download from the Internet each month. Although sample sizes are small, low-income households appear to be more likely to report this than others whose only means of connecting to the Internet at home is through a smartphone.
- Many of the households re-interviewed this year whose only means of connecting to the Internet is through a smartphone or who have no access to the Internet feel they are at a disadvantage when trying to perform a number of common activities. For example, about half of these households say they are at a disadvantage when trying to learn about or get access to government services (51%) or finding out about job opportunities or applying for a job online (50%). Another four in ten of these households feel they are at a disadvantage assisting children to learn and keep up with their school work (48%), getting health and medical information or communicating with a doctor (45%), gaining new career skills or taking classes or training courses online (43%), watching or downloading TV shows, movies or playing video games (40%), or keeping up with the news (40%).
- Cost is the main reason given by the households re-interviewed this year without access to the Internet this year for being without access. Greater than eight in ten (82%) of those without Internet access at home offer "too expensive" among the reasons why they are currently connected, and most (54%) say this is their main reason.

- There is generally low awareness of the special discount program that Internet providers make available to low-income households. Of all those re-interviewed this year in the follow-up survey, just 27% report having seen or heard about this program. Similarly, just 31% of respondents living in low-income households report being aware of this special discount, and only 18% say they contacted an Internet provider to inquire about the program.
- Households re-interviewed this year with access to the Internet say they are now going online to perform an increasing number of activities at home. The activities most frequently cited include assisting children to learn or keep up with their schoolwork (52%), watching or downloading TV shows, movies or playing video games (45%), getting health and medical information or communicating with a doctor online (37%), keeping up with the news (36%), managing money, transferring funds or banking online (33%). In each case, most of those not reporting an increase in online activity this year say they are doing this about as much as they did last year.
- Households with access to the Internet through a computing device are overwhelmingly of the view that having such access is extremely or very important (84%) to their overall quality of life. When households who are either under-connected or not connected are asked how important having access to the Internet through a computing device would be to their overall quality of life, a somewhat smaller proportion (48%) feel it would be extremely or very important to them, while another 26% feel it would be somewhat important.
- When all those re-interviewed this year were asked about the importance of the state ensuring that all California households have access to high speed Internet at home through a computing device, seven in ten (70%) feel it is extremely or very important. Another 15% describe this as somewhat important, while just 14% think it is not important.

Summary of the Findings

1. Changes in access to broadband Internet among households re-interviewed in June 2018 compared what was reported in June 2017

Nearly all households who reported being connected to the Internet through a computing device in June 2017 (95%) and were re-interviewed this year say that they continue to access the Internet from home in this way. Another 4% said they now have access only through a smartphone, while 1% no longer has broadband Internet connectivity at home.

By comparison, about three in four of those under-connected or not connected to the Internet last year report no change in their household’s Internet status this year. Of those who had access only through a smartphone, 22% say they migrated up and are now able to access the Internet through a computing device, while 4% no longer have access to the Internet at home. Of the households re-interviewed this year who reported not having broadband connectivity to the Internet last year, 21% can now connect to the Internet at home through a computing device, while another 4% now have access to the Internet but only through a smartphone.

Table 1
Changes in access to broadband Internet among households re-interviewed in June 2018 compared what was reported in June 2017

	Accessed the Internet thru a computing device last year %	Accessed the Internet only thru a smart-phone last year %	Broadband access not reported last year %
Internet access now (June 2018)			
Can access Internet at home thru a computing device	95	22	21
Can access Internet at home only thru a smartphone	4	74	4
No broadband Internet access at home reported	1	4	75
(n)	(472)	(46)*	(28)*

* Results based on small samples

2. Length of time household has had access to high speed Internet

Greater than three in four of the households re-interviewed this year (78%) who could access the Internet through a computing device, such as a computer, laptop, or tablet, have been online for six or more years. Another 11% have been connected between three and six years, while just 11% were connected for three years or less.

By contrast, just 17% of those whose only means of connecting to the Internet was through a smartphone report having had Internet access for six or more years, while over half (52%) have had access for three years or less. Another 27% have been connected to the Internet at home for three to six years.

Table 2
Length of time household has had access to high speed Internet
(comparing those with access through a computing device
to those with access only through a smartphone)

	Access thru computing device %	Access thru smartphone only %
1 year or less	5	13
Greater than 1 year – 3 years	6	37
Greater than 3 years – 6 years	11	27
Greater than 6 years	78	19
Not reported	**	4
(n)	(466)	(52)*

* Results based on a small sample

** Less than 1%

3. Households connected only through a smartphone that are limited in the amount of data they can download each month

Four in ten of the households whose only means of connecting to the Internet is through a smartphone (40%) say they are limited in the amount of data that they can download from the Internet each month, while 58% say they are not.

Although sample sizes are small, low-income households appear to be more likely than other households to have an Internet plan that limits the amount of data they can download each month.

Table 3
Households connected only through a smartphone that are limited in the amount of data they can download each month

	Total connected only thru a smartphone %	Household income	
		Less than \$20,000 %	\$20,000 or more %
Limited in amount of data that they can download each month			
Yes	40	48	33
No	58	48	67
Don't know	2	4	**
(n)	(52)*	(23)*	(27)*

* Results based on small samples

** Less than 1%

4. Proportion of households under-connected or not connected to the Internet who feel they are at a disadvantage when trying to perform various activities

Many of the households re-interviewed this year whose only means of connecting to the Internet is through a smartphone or who have no access to the Internet at home at all feel their household is at a disadvantage when trying to perform a number of common activities. For example, about half of these under-connected or unconnected households feel they are at a disadvantage when learning about or getting access to government services (51%) and when finding out about job opportunities or applying for a job online (50%)

Another four in ten of these households feel they are at a disadvantage assisting children to learn and keep up with their school work (48%), getting health and medical information or communicating with a doctor (45%), gaining new career skills or taking classes or training courses online (43%), watching or downloading TV shows, movies or playing video games (40%), or keeping up with the news (40%).

Table 4
Proportion of households under-connected or not connected to the Internet who feel they are at a disadvantage when trying to perform various activities

	Total under-connected /not connected %	Connected only thru a smartphone %	No Internet access at home %
Learning about or getting access to government services	51	53	46
Finding out about job opportunities or applying for a job	50	52	46
Assisting children to learn or keep up with school work	45	49	38
Getting health and medical information or communicating with a doctor	45	44	46
Gaining new career skills or taking classes or training courses	43	39	50
Watching or downloading TV shows, movies, or video games	40	46	29
Keeping up with the news	40	44	32
Managing money, transferring funds or banking online	36	31	46
Keeping in touch with family or friends	35	34	36
	(n)	(80)*	(52)*
			(28)*

* Results based on small samples

5. Reasons given for not having access to the Internet at home

Cost is the main reason given by the households re-interviewed this year without access to the Internet this year for being without access. Greater than eight in ten (82%) of those without Internet access at home offer “too expensive” among the reasons why they are currently connected, and most (54%) say this is their main reason.

About two in three of those who are without Internet access at home (68%) offer “can connect from another place if needed” as a reason for going without, and more than half also offer “too busy/ don’t have the time” (57%) or don’t have a computer or smartphone (54%). However, few offer any of these as their main reason for not having Internet access at home.

Table 5
Reasons given for not having access to the Internet at home
(among those not currently reporting access to broadband Internet at home)

	Total citing this as a reason for not being connected %	Main reason for not being connected %
Too expensive	82	54
Can connect from another place, if needed	68	7
Too busy/ don’t have the time	57	7
Don’t have a computer or smartphone	54	7
Not interested	46	7
Concerns about privacy or computer viruses	39	7
Too difficult to set up and learn	39	**
Internet service not available/adequate where I live	29	**
Not reported	--	10
<i>(n)</i>	<i>(28)*</i>	<i>(28)*</i>

* Results based on small samples

** Less than 1%

6. Awareness of a special discount program that Internet providers make available to low-income households that significantly reduces the cost of getting access to high speed Internet at home

There is generally low public awareness of the special discount program that Internet providers make available to low-income households. Of all those re-interviewed this year in the follow-up survey, just 27% report having seen or heard about this program.

Similarly, just 31% of respondents living in low-income households report being aware of this special discount, and only 18% say they contacted an Internet provider to inquire about the program.

Table 6
Awareness of a special discount program that Internet providers make available to low-income households that significantly reduces the cost of getting access to high speed Internet at home

	Total households	Low-income households
	%	%
No, not aware	74	72
Yes, aware of these programs	<u>27</u>	<u>31</u>
<u>Ever contact an Internet provider about this?</u>		
Yes	N/A	18
No	N/A	13
	(n)	(88)*
	(546)	

* Results based on a small sample

N/A: Follow-up question asked only of low-income households

7. Ways that households with broadband connectivity are using the Internet now compared to last year

Households re-interviewed this year with access to the Internet at home say they are now going online to perform an increasing number of activities.

The activity most frequently cited relates to assisting children to learn or keep up with their schoolwork, which 52% of the households with children under age 18 report doing this more of this year than last. Another 37% of these household report doing this as much as they did last year, while just 11% are going online to do this less this year than last or are not doing it at all.

Other activities that increasing proportions of households report going online to perform this year compared to last year include: watching or downloading TV shows, movies or playing video games (45%), getting health and medical information or communicating with a doctor online (37%), keeping up with the news (36%), managing money, transferring funds or banking online (33%). In each case, most of those not reporting an increase in online activity this year say they are doing this about as much as they did last year, while relatively small proportions report doing this less or not at all.

Table 7
Ways that households with broadband connectivity are using the Internet now compared to last year

	Doing this more now than last year	Doing this about the same as last year	Doing this less now/ not at all
	%	%	% (n)
Assisting children to learn, keep up with school work	52	37	10 (221)*
Watching or downloading TV shows, movies, or video games	45	40	15 (518)
Getting health and medical information or communicating with a doctor	37	38	25 (518)
Keeping up with the news	36	46	18 (518)
Managing money or transferring funds or banking	33	52	15 (518)
Keeping in touch with family or friends	30	60	10 (518)
Gaining new career skills, taking classes, training courses	31	24	45 (518)
Learning about or getting access to government services	27	40	33 (518)
Finding out about job opportunities, applying for a job	23	25	52 (518)

* Results of this activity based on households with children under age 18

8. How important is having access to the Internet at home to your overall quality of life (among those with access to the Internet through a computing device)

Households with access to the Internet through a computing device are overwhelmingly of the view that having such access is extremely or very important (84%) to their overall quality of life. Another 12% feel it is somewhat important to their overall quality of life, while just 3% say it is not too or not at all important.

Table 8
How important is having access to the Internet at home
to your overall quality of life?
(among those with access to the Internet through a computing device)

	Households with access to Internet thru a computing device
	%
Extremely important	52
Very important	32
Somewhat important	12
Not too important	3
Not at all important	1
<i>(n)</i>	<i>(466)</i>

9. Perceived importance of Internet access through a computing device to your overall quality of life (among those under-connected or not connected)

When households who are either under-connected or not connected are asked how important having access to the Internet through a computing device would be to their overall quality of life, 48% say it would be extremely or very important to them, while another 26% feel it would be somewhat important. Just one in four (24%) feel this would not be important to them.

Those connected to the Internet only through a smartphone are more likely than those without any access to the Internet at home to feel that having access to the Internet at home through a computing device would be extremely or very important to their overall quality of life.

Table 9
Perceived importance of having Internet access thru a computing device to your overall quality of life
(among those under-connected or not connected to the Internet at home)

	Total under-connected /not connected %	Connected only thru a smartphone %	No Internet access at home %
Extremely important	12	15	7
Very important	36	40	29
Somewhat important	26	27	25
Not too important	10	10	11
Not at all important	14	8	25
No opinion	1	**	3
	(n)	(80)*	(52)*
			(28)*

* Results based on small samples

** Less than 1%

10. How important is it for the state of California to ensure that all California households have access to high speed Internet through a computing device

When all those re-interviewed this year were asked about the importance of the state ensuring that all California households have access to high speed Internet at home through a computing device, seven in ten (70%) feel it is extremely or very important. Another 15% describe this as somewhat important, while just 14% think it is not important.

Table 10
How important is it for the state of California to ensure that all California households have access to high speed Internet through a computing device?

	Total households	%
Extremely important	31	
Very important	39	
Somewhat important	15	
Not too important	6	
Not at all important	8	
No opinion	1	
	(n)	(546)

Appendices

2018 CETF Follow-up Survey

Hello. May I please speak to **FIRST NAME OF RESPONDENT**?

ONCE DESIGNATED RESPONDENT ON THE PHONE SAY:

My name is _____ and I'm calling on behalf of the California Emerging Technology Fund. About a year ago, you participated in a telephone survey about your household's use of the Internet. At the end of that survey you said it would be okay if we called you back to ask you a few additional questions this year. This will not take long – only about 5 or 10 minutes for most people and we'll pay you (\$5) (\$10) once we're done. **(IF NECESSARY, SAY:)** We are not selling anything.

- | | |
|--|-----------------------------|
| 1. When we spoke last year you said that your household | SAME (NO CHANGE).....1 |
| (INSERT ONLY ONE OF THE FOLLOWING FROM ANSWER GIVEN IN 2017): | DIFFERENT2 |
| (1) could connect to the Internet at home through a computer, laptop, or tablet computing device. (2) could connect to the Internet at home through a smartphone and not through a computer laptop or tablet computing device. (3) did not have access to the Internet at home.) Is that still the case? | DON'T KNOW/NOT SUREDK |

IF Q1=2 OR DK (DIFFERENT OR DON'T KNOW/NOT SURE):

- | | |
|---|-----------------------------|
| 2. Can you (or can others in your household) now connect to the Internet from home? | YES.....1 |
| | NO2 |
| | DON'T KNOW/NOT SUREDK |

IF YES OR DON'T KNOW/NOT SURE, ASK:

- | | |
|--|----------------------|
| 3. Can you (or can others) connect to the Internet from home (READ IN RANDOM ORDER) | <u>YES</u> <u>NO</u> |
| a. through a computer, laptop or tablet computing device? | 1..... 2 |
| b. through a smartphone? | 1..... 2 |

IF CURRENTLY CONNECTED TO INTERNET THRU ANY DEVICE:

- | | |
|---|-----------------------------|
| 4. How long have you had access to the Internet from home (IF CAN CONNECT THRU A COMPUTER, LAPTOP OR TABLET, SAY: through a computer, laptop or tablet) (IF SMART PHONE AND NOT A COMPUTING DEVICE: through your smartphone) -- for 1 year or less, for greater than 1 year but not more than 3 years, for greater than 3 years but not more than 6 years, or for more than 6 years? | 1 YEAR OR LESS..... 1 |
| | >1 YEAR - 3 YEARS..... 2 |
| | > 3 YEARS – 6 YEARS 3 |
| | > 6 YEARS 4 |
| | DON'T KNOW DK |

IF CONNECTED TO THE INTERNET AT HOME THRU A SMARTPHONE AND NOT A COMPUTING DEVICE:

- | | |
|---|-------------------|
| 5. Are you now limited in the amount of data that you can download from the Internet each month, such that if you were to go over the limit you would need to pay more? | YES..... 1 |
| | NO.....2 |
| | DON'T KNOW.....DK |

ASKED OF HOUSEHOLDS NOW CONNECTED TO THE INTERNET THRU ANY DEVICE

ASK ITEMS IN Q6(1) ONLY FOR TASKS THAT THE INTERNET WAS REPORTEDLY USED IN 2017:

6 (1). Last year you reported that you (or others in your household) connected to the Internet from home to ITEM. (READ EACH ITEM REPORTEDLY USED IN 2017 ONE AT A TIME IN RANDOM ORDER) Compared to last year, are you (or are others in your household) now connecting to the Internet from home to do this more, about the same or less than last year?

	<u>MORE</u>	<u>SAME</u>	<u>LESS</u>	<u>DK</u>
a. learn about or obtain access to government services	1	2	3	DK
b. keep in touch with family or friends	1	2	3	DK
c. find out about job opportunities or to apply for a job	1	2	3	DK
d. manage money, transfer funds or bank online	1	2	3	DK
e. gain new career skills or take a class or training course	1	2	3	DK
f. get health or medical information or communicate with a doctor	1	2	3	DK
g. assist the children in your household to learn or keep up with their schoolwork	1	2	3	DK
h. keep up with the news	1	2	3	DK
i. watch or download TV shows or movies, play games or listen to music	1	2	3	DK

ASK ITEMS IN Q6(2) ONLY FOR TASKS THAT THE INTERNET WAS NOT USED IN 2017 OR AMONG THOSE CURRENTLY INTERNET USERS WHO WERE NOT CONNECTED IN 2017:

6 (2). Do you (or do others in your household) now connect to the Internet from home to ITEM ? (READ EACH ITEM NOT REPORTEDLY USED IN 2017 ONE AT A TIME IN RANDOM ORDER)

	<u>YES</u>	<u>NO</u>	<u>DK</u>
() a. learn about or obtain access to government services	1	2	DK
() b. keep in touch with family or friends	1	2	DK
() c. find out about job opportunities or to apply for a job	1	2	DK
() d. manage money, transfer funds or bank online	1	2	DK
() e. gain new career skills or take a class or training course	1	2	DK
() f. get health or medical information or communicate with a doctor	1	2	DK
() g. assist the children in your household to learn or keep up with their schoolwork	1	2	DK NA
() h. keep up with the news	1	2	DK
() i. watch or download TV shows or movies, play games or listen to music	1	2	DK

IF CONNECTED TO THE INTERNET AT HOME THRU A SMARTPHONE AND NOT A COMPUTING DEVICE, ASK THE ITEMS IN Q7 IMMEDIATELY AFTER THAT ITEM WAS ASKED AS PART OF Q6(1) OR Q6(2):

7.	Do you feel that you (or others in your household) are at a disadvantage when you (or they) want to (READ EACH ITEM IN RANDOM ORDER) because your only means of connecting to the Internet at home is through a cell phone?			
		<u>YES</u>	<u>NO</u>	<u>DK</u>
()	a. learn about or get access to government services	1	2	DK
()	b. keep in touch with family or friends	1	2	DK
()	c. find out about job opportunities or to apply for a job	1	2	DK
()	d. manage money, transfer funds or bank online	1	2	DK
()	e. gain new career skills or take a class or training course	1	2	DK
()	f. get health or medical information or communicate with a doctor	1	2	DK
()	g. assist the children in your household to learn or keep up with their schoolwork	1	2	DK NA
()	i. watch or download TV shows, movies or play video games	1	2	DK

IF CONNECTED TO THE INTERNET THRU A COMPUTER, LAPTOP OR TABLET AT HOME:

8.	How important is it to your overall quality of life to have access to high speed Internet at home -- (READ CATEGORIES)? For example, to get more opportunities to earn income, or to get greater access to essential health, government or financial services, or to enable you to pursue more of your personal interests.	Extremely important.....	1
		Very important.....	2
		Somewhat important.....	3
		Not too important.....	4
		Not at all important.....	5
		DON'T KNOW.....	DK

IF CONNECTED TO THE INTERNET AT HOME THRU A SMARTPHONE AND NOT A COMPUTING DEVICE:

9.	How important would it be to your overall quality of life to have access to the high speed Internet at home through a computer, laptop or tablet rather than just through a smartphone - (READ CATEGORIES)? For example, to get more opportunities to earn income, or to get greater access to essential health, government or financial services, or to enable you to pursue more of your personal interests.	Extremely important.....	1
		Very important.....	2
		Somewhat important.....	3
		Not too important.....	4
		Not at all important.....	5
		DON'T KNOW.....	DK

ASKED OF HOUSEHOLDS NOT CURRENTLY CONNECTED TO INTERNET

IF NOT CURRENTLY CONNECTED TO THE INTERNET FROM HOME:

10. I am going to read some reasons why people do not have Internet service at home. For each, please tell me whether or not this is a reason why your household doesn't have Internet service from home. **(READ ITEMS ONE AT A TIME IN RANDOM ORDER, ASKING:)** Is this a reason why your household doesn't have Internet service?

IF MORE THAN ONE "YES" ANSWER:

11. You gave the following answers as reasons your household doesn't have Internet service. **(READ BACK ALL CATEGORIES ANSWERED YES, ASKING:)** Which of these would you say is the main reason your household doesn't have Internet service?

	(Q10)			(Q11)
	<u>YES</u>	<u>NO</u>	<u>DK</u>	<u>MAIN</u>
() a. Internet service is too expensive	1	2	DK	1
() b. don't have a computer or a smart phone	1	2	DK	2
() c. Internet service is not available or adequate where I live	1	2	DK	3
() d. not interested	1	2	DK	4
() e. it is too difficult to set up and learn	1	2	DK	5
() f. too busy, don't have the time	1	2	DK	6
() g. can connect to it from another place if needed	1	2	DK	7
() h. concerned about privacy or computer viruses	1	2	DK	8
	DON'T KNOW			DK

12. Do you feel that you (or others in your household) are at a disadvantage when you (or they) want to **(ITEM)** but cannot because your household does not have Internet service?

	<u>YES</u>	<u>NO</u>	<u>DK</u>
() a. learn about or get access to government services	1	2	DK
() b. keep in touch with family or friends	1	2	DK
() c. find out about job opportunities or to apply for a job	1	2	DK
() d. manage money, transfer funds or bank online	1	2	DK
() e. gain new career skills or take a class or training course	1	2	DK
() f. get health or medical information or communicate with a doctor	1	2	DK
() g. assist the children in your household to learn or keep up with their schoolwork	1	2	DK / NA
() h. keep up with the news	1	2	DK
() i. watch or download TV shows, movies or play video games	1	2	DK

13. How important would it be to your overall quality of life to have access to high speed Internet at home - **(READ CATEGORIES)?** For example, to get more opportunities to earn income, or to get greater access to essential health, government or financial services, or to enable you to pursue more of your personal interests.

Extremely important	1
Very important	2
Somewhat important	3
Not too important	4
Not at all important	5
DON'T KNOW	DK

QUESTIONS ASKED OF EVERYONE

14. How important do you feel it is for the state to ensure that all California households have access to high speed Internet at home through a computer, laptop or tablet computing device -- extremely important, very important, somewhat important, not too important or not at all important?	EXTREMELY IMPORTANT 1
	VERY IMPORTANT..... 2
	SOMEWHAT IMPORTANT..... 3
	NOT TOO IMPORTANT 4
	NOT AT ALL IMPORTANT 5
	DON'T KNOW..... DK

Finally, some questions about yourself for classification purposes . . .

15. Are you still living in the same household as you did last year or have you moved?	SAME HOUSEHOLD 1
	MOVED..... 2
	REFUSAL REF

IF MOVED:

16. In what county do you live?			
ALAMEDA 01	LAKE 17	RIVERSIDE 33	SONOMA 49
ALPINE 02	LASSEN 18	SACRAMENTO..... 34	STANISLAUS 50
AMADOR 03	LOS ANGELES 19	SAN BENITO 35	SUTTER 51
BUTTE 04	MADERA 20	SAN BERNARDINO 36	TEHAMA 52
CALAVARES..... 05	MARIN 21	SAN DIEGO..... 37	TRINITY..... 53
COLUSA 06	MARIPOSA 22	SAN FRANCISCO 38	TULARE..... 54
CONTRA COSTA 07	MENDOCINO..... 23	SAN JOAQUIN 39	TUOLUMNE 55
DEL NORTE 08	MERCED 24	SAN LUIS OBISPO 40	VENTURA 56
EL DORADO 09	MODOC 25	SAN MATEO 41	YOLO..... 57
FRESNO..... 10	MONO 26	SANTA BARBARA 42	YUBA 58
GLENN..... 11	MONTEREY 27	SANTA CLARA 43	NOT IN CA 59
HUMBOLDT..... 12	NAPA 28	SANTA CRUZ 44	(TERMINATE)
IMPERIAL 13	NEVADA 29	SHASTA 45	OTHER/DK DK
INYO..... 14	ORANGE 30	SIERRA 46	
KERN..... 15	PLACER..... 31	SISKIYOU 47	
KINGS..... 16	PLUMAS 32	SOLANO..... 48	

17. Including yourself, how many people currently live in your household?	_____ PEOPLE
	REFUSED REF

IF MORE THAN ONE:

18. Are there any children under age 18 currently living in your household?	YES..... 1
	NO..... 2
	REFUSED..... REF

IF MOVED FROM Q15 OR REFUSED HOUSEHOLD INCOME QUESTION IN 2017:

19. Now, we don't want to know your exact income, but just roughly, could you tell me if your annual household income before taxes is under \$20,000, \$20,000-\$40,000, \$40,000-\$60,000, \$60,000-\$80,000, \$80,000-\$100,000 or \$100,000 or more?	LESS THAN \$20,000 1
	\$20,000-\$39,999 2
	\$40,000-\$59,999 3
	\$60,000-\$79,999 4
	\$80,000-\$99,999 5
	\$100,000 OR MORE 6
	DON'T KNOW/REFUSED DK

20. Are you aware of any special discount offers that Internet companies in California make available to households like yours) **(IF HOUSEHOLD INCOME LESS THAN \$20,000, ADD: (IF HOUSEHOLD INCOME \$20,000 OR MORE, ADD: low income households) that significantly reduce the costs of getting high speed Internet service at home?**
- YES..... 1
 NO2
 DON'T KNOW.....DK

IF Q20=YES AND HOUSEHOLD INCOME LESS THAN \$20,000:

- | | |
|--|--|
| 21. Have you ever contacted an Internet company to ask them about these discount offers to see if your household can get high speed Internet access at one of these low rates? | YES 1
NO2
DON'T KNOWDK |
|--|--|

These are all the questions I have.

22. As a special thank you, we would like to send you a gift card from Amazon worth (five/ten) dollars and can send this to you by email. Are you reachable by email? **(IF HOUSEHOLD INCOME \$80,000 OR MORE, ADD: Alternatively, we can make a (five/ten) dollar donation to a charity that helps disadvantaged families. Which would you prefer?)**
- REACHABLE BY EMAIL—SEND GIFT CARD1- **ASK Q23**
 NOT REACHABLE BY EMAIL.....2- **ASK Q24**
 MAKE DONATION INSTEAD.....3-**END**
 REFUSES PAYMENT.....4-**END**

IF YES:

- | | |
|--|------------------------|
| 23. What is your email address? (CONFIRM EMAIL ADDRESS) | EMAIL ADDRESS
_____ |
|--|------------------------|

IF NO:

- | | |
|---|--|
| 24. We can also mail you a check for (five/ten) dollars. Would you like us to mail you a check? (IF YES, ASK) To what name and address should we mail the check? | MAIL CHECK
YES..... 1
NO..... 2
NAME:

ADDRESS:

CITY/ZIP :
_____ |
|---|--|

Thank you very much for participating in this survey.

**2018 CETF Follow-up Survey
Email Invitation**

Dear <FIRST NAME>,

At about this time last year, you kindly participated in an important telephone survey conducted on behalf of the California Emerging Technology Fund (CETF), a non-profit foundation whose mission is to promote broadband Internet access among all Californians. At the end of last year's survey you said that it would be okay if we called you back again this year to ask you some additional questions, and you also gave us your email address at that time.

In the next couple days a telephone interviewer working on our behalf will be calling you to complete a follow-up survey about your household's usage of the Internet.

While taking part in the survey is totally voluntary, your answers are very important to us and we hope you will take the time to complete the survey. It will not take long, only about 5-10 minutes for most people. As a token of our appreciation, after you've completed the survey we will send you with a gift certificate from Amazon worth (\$5) (\$10).

Please be assured that we are not selling anything and that you will not receive any follow-up solicitations from anyone as a result of participating in the survey. All of your answers will remain anonymous and not be identified with you in any way. They will simply be combined with the answers given by other Californians to permit us to analyze all survey responses overall.

If you prefer to complete the survey at a time of your own choosing instead of waiting for our interviewer to call, you can do so by calling 1-800-387-0840 toll-free between 9 a.m. and 9 p.m. any day during the coming week. Please tell the person answering that you would like to take part in "the CETF Internet survey."

For more information about the California Emerging Technology Fund and our mission to promote Internet access among all Californians, please visit www.cetfund.org.

Thank you very much for your time.

Sunne Wright McPeak,
President and CEO, California Emerging Technology Fund

**2018 CETF Follow-up Survey
Final Disposition of Contact Attempts**

	TOTAL
TOTAL ELIGIBLE LISTINGS	1079
NON-USABLE LISTINGS	<u>168</u>
DISCONNECTED/NON-WORKING/NON-RESIDENTIAL NUMBER	66
LANGUAGE BARRIER	8
FAX NUMBER	1
WRONG NUMBER/RESPONDENT DOESN'T LIVE THERE	73
NO LONGER A CALIFORNIA RESIDENT	18
OTHER UNUSABLE	2
USABLE LISTINGS	<u>911</u>
REFUSAL/DO NOT CALL BACK	93
TERMINATED MID-SURVEY	13
PHONE NUMBER BLOCKED	1
NO ANSWER / BUSY / VOICEMAIL AFTER FINAL ATTEMPT	258
COMPLETED SURVEY	546