

THE FIELD POLL

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Wide Differences in Broadband Connectivity Across California Households

Disparities Exist Among Demographic Subgroups

According to a new statewide *Field Poll* examining the "digital divide" in California, 79% of California households have a broadband connection at home, while 21% do not. Overall, including the much slower dial-up connections, 87% of households reported they have the ability to connect to the Internet from home. The survey was conducted on behalf of the California Emerging Technology Fund (CETF), a non-profit foundation focused on promoting broadband deployment and adoption.

The main reason for not having any home Internet connectivity continues to relate to the cost of Internet service or not having a computer or smart phone at home, cited by 77% of those without Internet access at home.

Home Internet connectivity, which includes using a smart phone to access the Internet, varies significantly across different subgroups of the state's households. Nearly all California households with annual incomes of \$60,000 or more, or include college graduates, white non-Hispanics, or adults under age 40 have Internet access at home.

The survey finds that nearly four in five California households (79%) report having high-speed Internet, at home. The large majority (71%) of this group accesses the Internet through DSL, cable, satellite or fiber optic connections to a home desktop, laptop or tablet computer, while 8% connect to the Internet at home only through a smart phone. Home broadband connectivity has increased slightly from last year, up from 75% in 2014, including 8% who connected only through a smart phone.

The subgroups that are least likely to have broadband connectivity at home are generally the same segments of the population without any access to the Internet at home. The following are the subgroups reporting the lowest levels of home broadband connectivity, including those using a smart phone only:

- Adults who have not graduated from high school (52%)
- Seniors age 65 or older (57%)
- Adults who identify having a disability (59%)

- Spanish-speaking Latinos (63%)
- Households whose total annual income is less than \$20,000 (65%)
- Non-citizens (68%)

The subgroups most likely to only have broadband connectivity through a smart phone are:

- Spanish-speaking Latinos (21%)
- Parents of children under age 18 who are not married (19%)
- Adults who have not graduated from high school (18%)
- Non-citizens (16%)
- Households whose total annual income is less than \$20,000 (16%)

Adults with broadband connectivity at home are twice as likely as those without it to report also having broadband access to the Internet through a computer outside their home. Overall, 57% of adults have broadband connectivity both at home and through a computer outside the home. More than half of those (36%) say they access the Internet through a computer at work. By contrast, just 29% of adults without broadband connectivity at home have access to the Internet through a computer outside their home, with their most common broadband connection being through a computer at the library (11%).

The survey was conducted by landline and cell phone with 1,664 California adults in six languages and dialects – English, Spanish, Cantonese, Mandarin, Vietnamese and Korean – between April 23 and May 16, 2015. PowerPoint graphs providing a more detailed summary of the findings from this year's survey are attached.

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Information About The Survey

Methodological Details

The findings in this report come from a telephone survey completed April 23-May 16, 2015 among a random sample of 1,664 California adults. The survey was conducted on behalf of the California Emerging Technology Fund, a non-profit foundation set up by the California Public Utilities Commission.

To capture the diversity of the California adult population, the survey was administered in six languages and dialects – English, Spanish, Cantonese, Mandarin, Vietnamese and Korean, depending on the preference of the respondent.

The sample was developed using a dual frame random digit dial cell phone and landline methodology to generate telephone listings covering the state of California. Up to six attempts were made to reach, screen and interview each randomly selected adult on different days and times of day during the interviewing period. After the completion of interviewing, the combined landline and cell phone sample was weighted to match demographic, geographic and other estimates of the adult population in California. The weighting process also takes into account the higher probability of reaching respondents who can receive calls on both a landline and cell phone.

Sampling error estimates applicable to the results of any probability-based survey depend on sample size and the percentage distributions being examined. The maximum sampling error for results from the overall random sample of adults is +/- 2.6 percentage points at the 95% confidence level.

The maximum sampling error estimates are based on survey findings near the middle of the sampling distribution (i.e., results near 30%-60%). Percentages at or near either tail of the distributions (i.e., results closer to 10% or 90%) have somewhat smaller margins of error. There are other potential sources of error in surveys of public opinion besides sampling error. However, the overall design and execution of this survey sought to minimize these other possible errors.

The Field Poll was established in 1947 as *The California Poll* by Mervin Field. The Poll has operated continuously since then as an independent, non-partisan survey of California public opinion. The Poll receives funding from media subscribers, from foundations, not-for-profit organizations, and from the University of California and California State University systems, who receive the data files from each *Field Poll* survey shortly after its completion for teaching and secondary research purposes.

Questions Asked

ASKED OF ALL ADULTS: Can you or can others in your household connect to the Internet from home? This includes connecting to the Internet from a smart phone or from a desktop, laptop or tablet computer. (IF YES, ASK: Is that through a smart phone, or through a desktop, laptop, or tablet computer?) (ANSWER CAN BE A MULTIPLE YES)

ASKED IF CAN CONNECT THROUGH DESKTOP/LAPTOP/TABLET: When connecting to the Internet from a computer at home, do you connect through a high speed or broadband connection, such as through D-S-L, cable, satellite, fiber optic or a T-1 line, or is it through a dial-up modem connection? (ASKED IF DON'T KNOW: People who have a dial-up connection to the Internet hear telephone tones and other sounds whenever their computer is connecting them to the Internet. When connecting to the Internet from a computer at your home, do you hear telephone tones and other sounds?)

ASKED IF CAN CONNECT THROUGH SMART PHONE AND NOT DESKTOP/LAPTOP/TABLET: Just to confirm, the only way that you or others in your household can connect to the Internet at home is through a smart phone. Is that correct?

ASKED IF NO INTERNET CONNECTIVITY AT HOME: 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 access. (READ ITEMS ONE AT A TIME IN RANDOM ORDER, ASKING:) Is this a reason why your household doesn't have Internet service?

- a. Internet service is too expensive
- b. Don't have a computer or a smart phone
- c. Internet service is not available where I live
- d. Not interested
- e. It's too difficult to set up and learn
- f. Too busy, don't have the time
- g. Can connect to it from another place if needed
- h. Concerns about privacy or computer viruses

ASKED OF ALL ADULTS: Do you yourself ever connect to the Internet through a high speed or broadband connection from a computer outside your home, such as at work, at school, at the library or some other place? (ASKED IF YES: Is that from a computer at work, at school, at the library or from some other place? (ANSWER CAN BE A MULTIPLE)



Internet Connectivity and the “Digital Divide” in California Households: 2015

- A statewide survey conducted for -
California Emerging Technology Fund

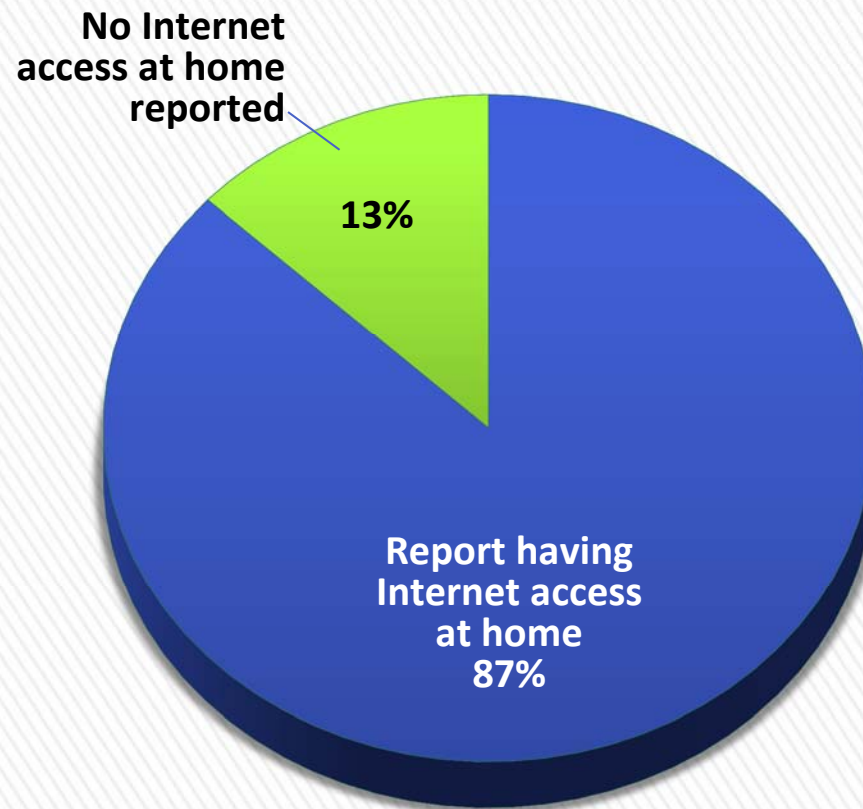
- by -
The Field Poll

May 2015

About the Survey

Population surveyed:	California adults age 18 or older
Method of data collection:	Interviews conducted by means of computer-assisted telephone interviewing by live interviewers
Sampling method:	Random samples of adults developed from dual frame of random digit dial cell and landline phone listings covering California
Languages of administration:	English, Spanish, Cantonese, Mandarin, Korean and Vietnamese
Sample size:	1,664 interviews completed: English (1,237), Spanish (326), Chinese (51), Vietnamese (30), Korean (20)
Interviewing period:	April 23 – May 16, 2015

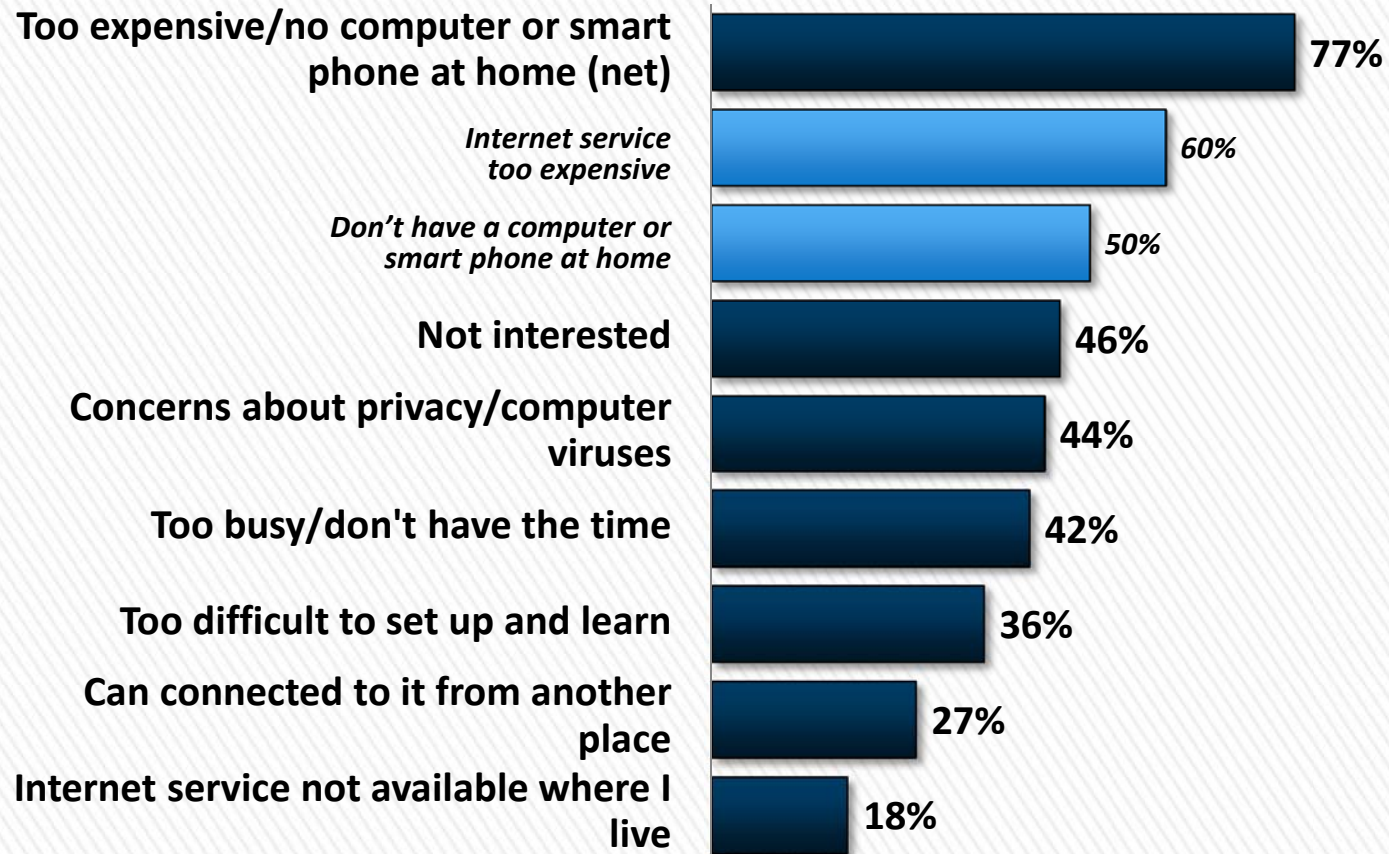
Table 1
**Internet connectivity in California households
through any device* (2015)**



* Includes Internet access through a smart phone or from a desktop, laptop or tablet computer.

Table 2

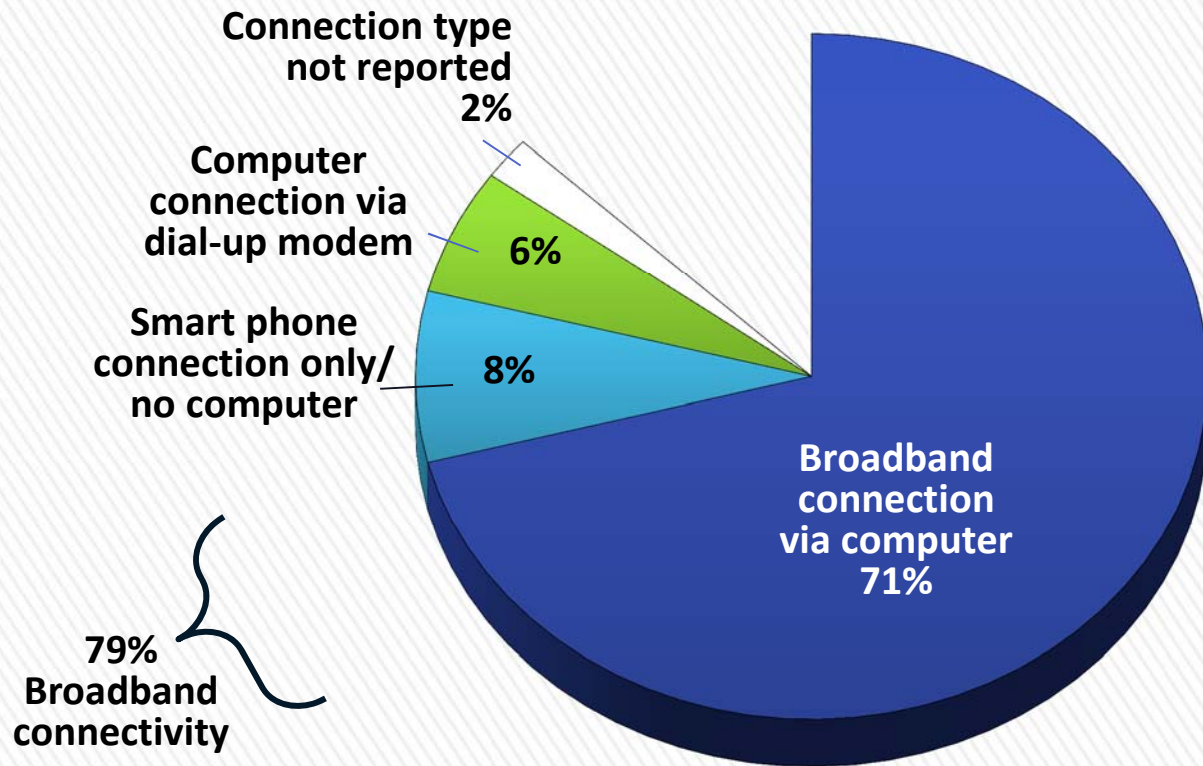
Reasons for not having Internet connectivity at home



Percentages add to more than 100% due to multiple mentions.

Table 3a

How California households with Internet access connect to it *(among the 87% of households with Internet connectivity)*



Note: Computer connection includes access to Internet through a desktop, laptop or tablet computer.

Table 3b

Broadband connectivity at home *(by region, household income and tenure)*

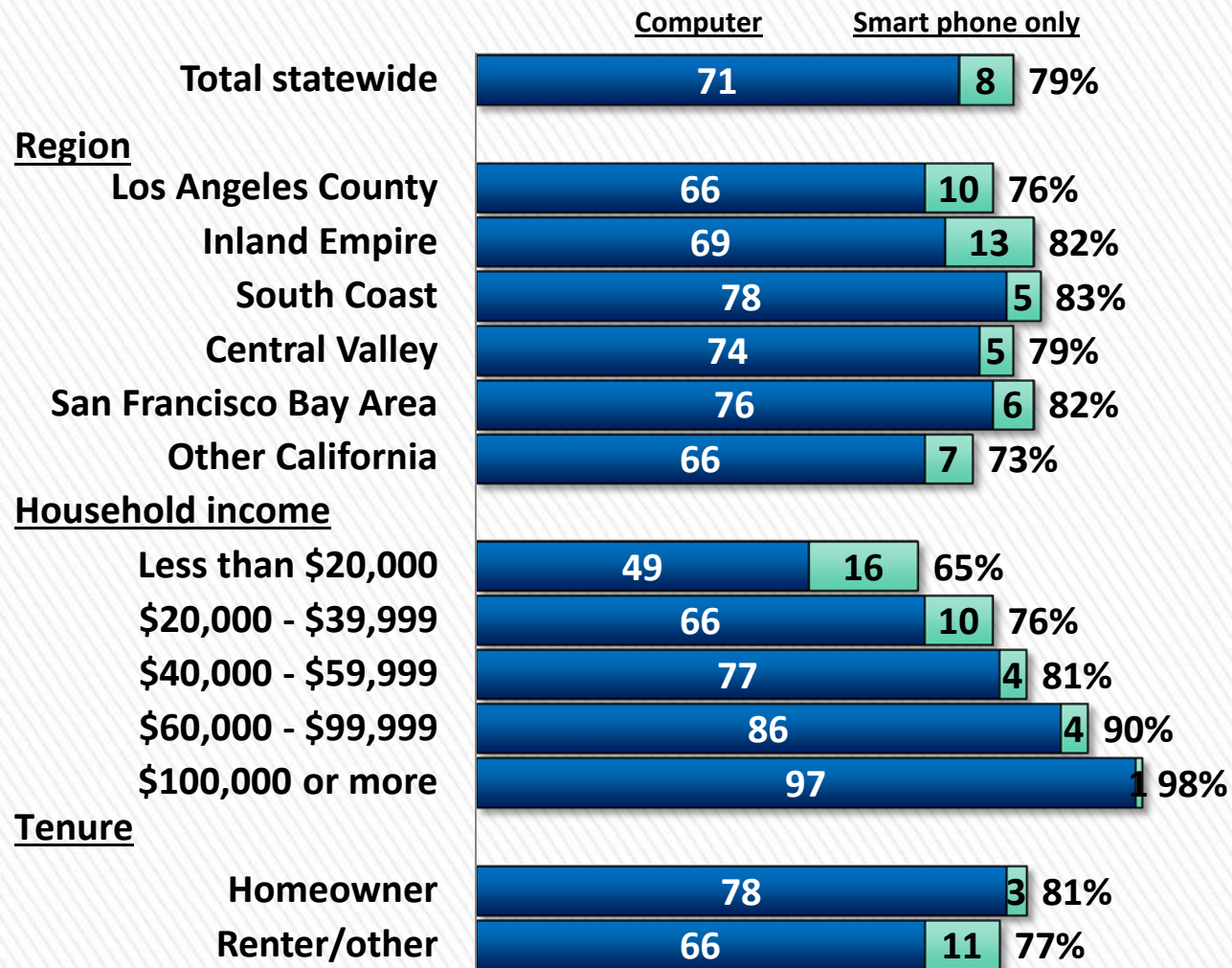


Table 3c

Broadband connectivity at home (by gender, age and race/ethnicity of householder)

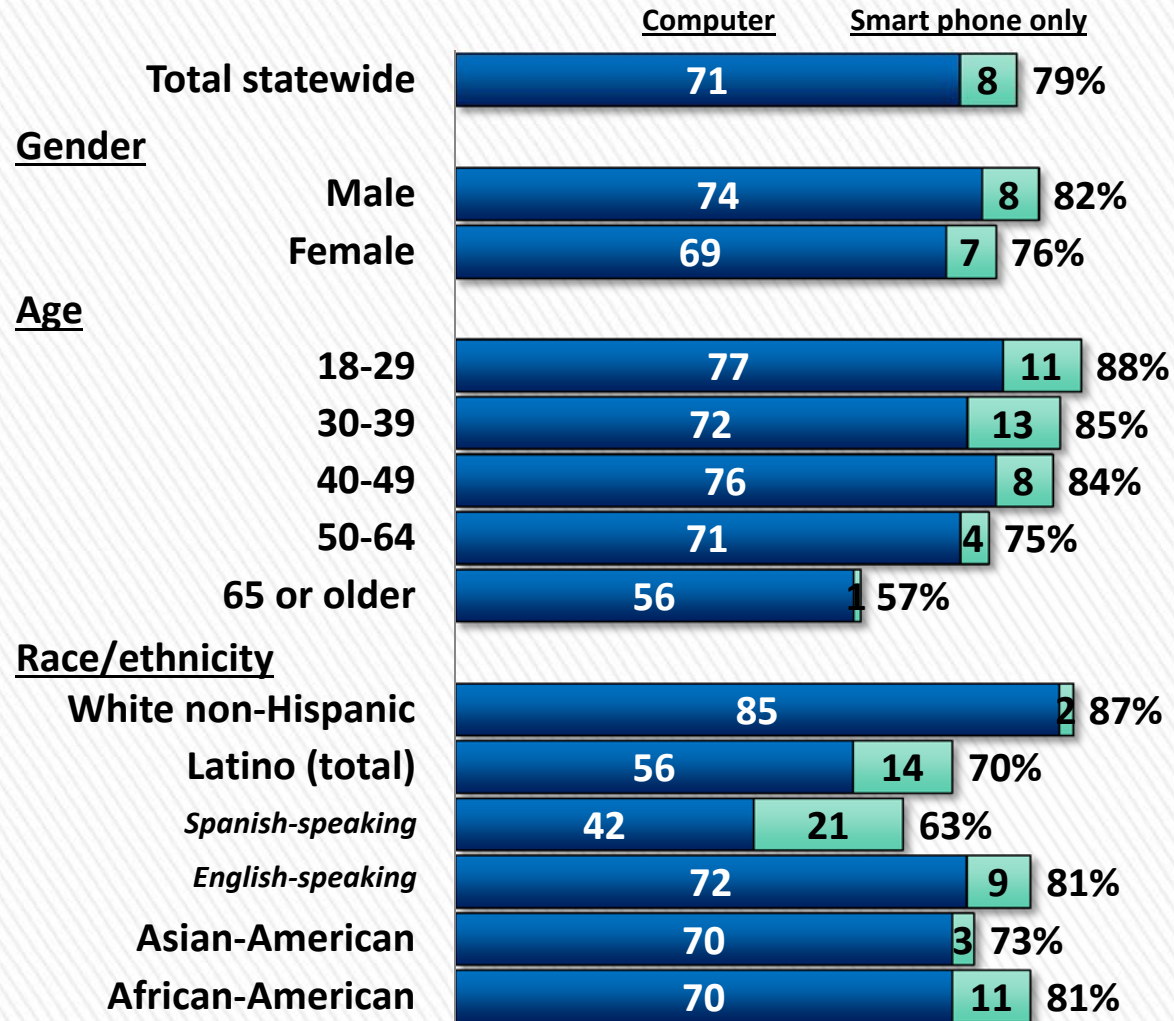


Table 3d

Broadband connectivity at home (by citizenship status, educational attainment and disability status of householder)

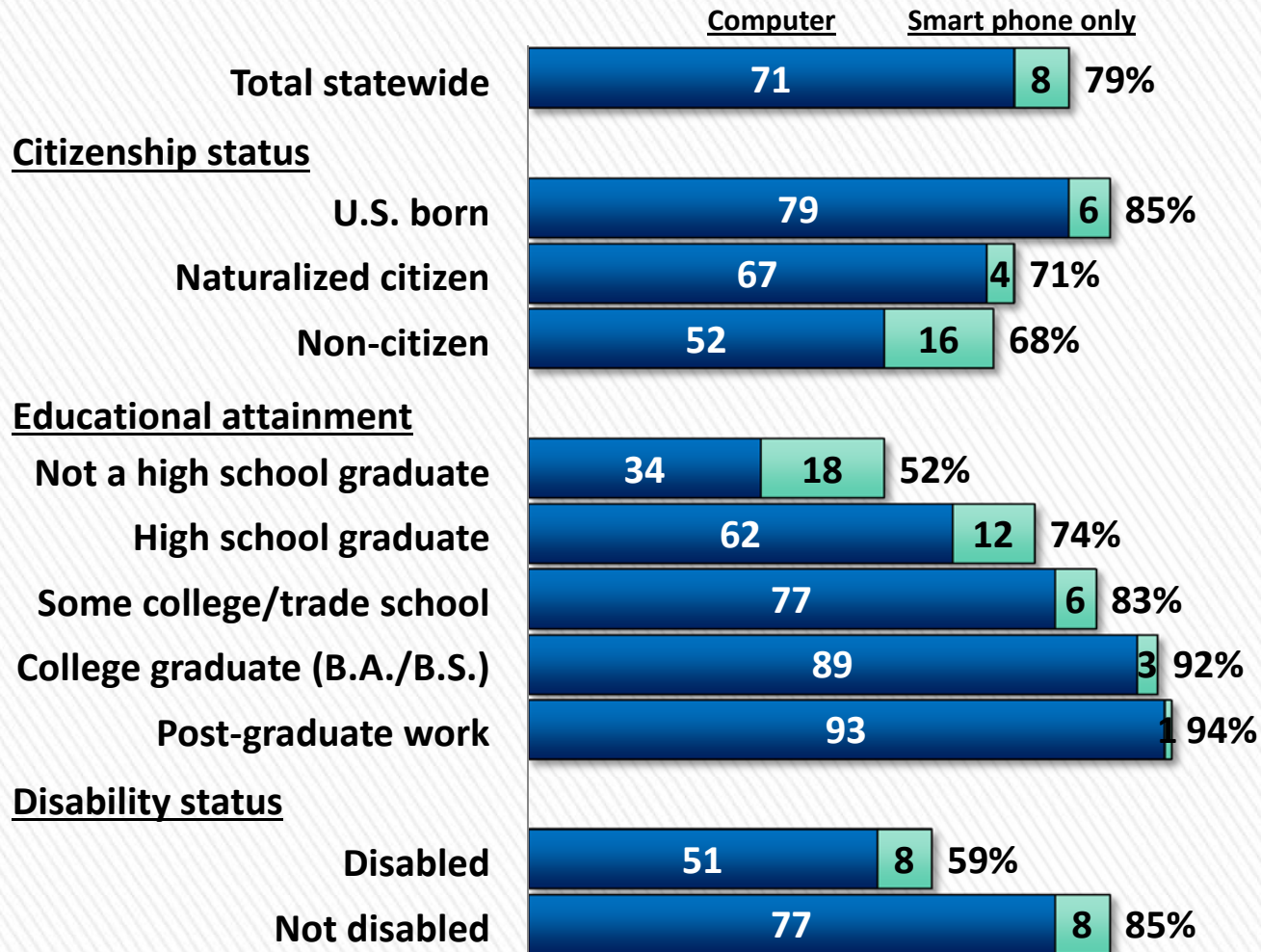


Table 3e
Broadband connectivity at home
(by marital and parental status of householder)

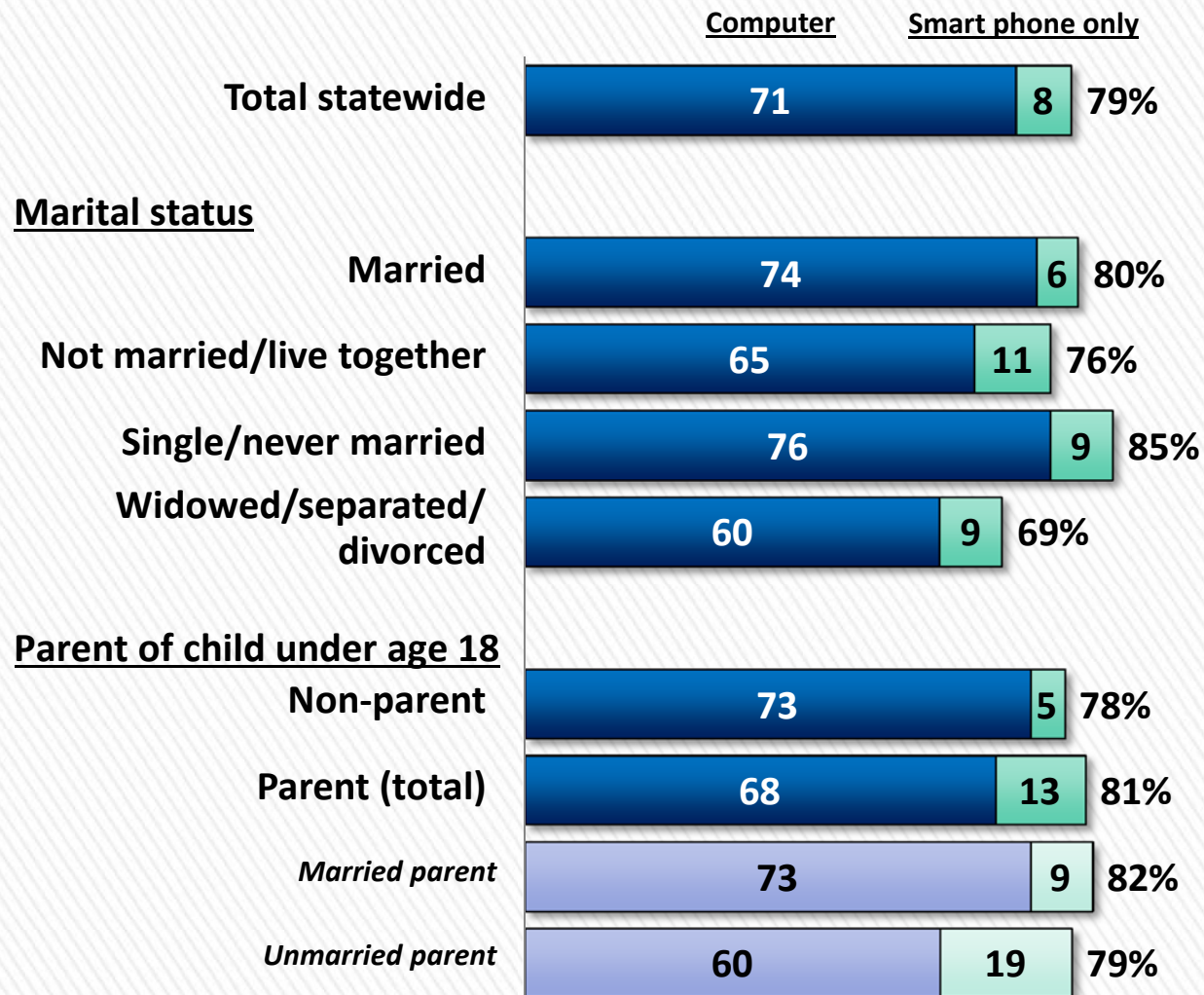
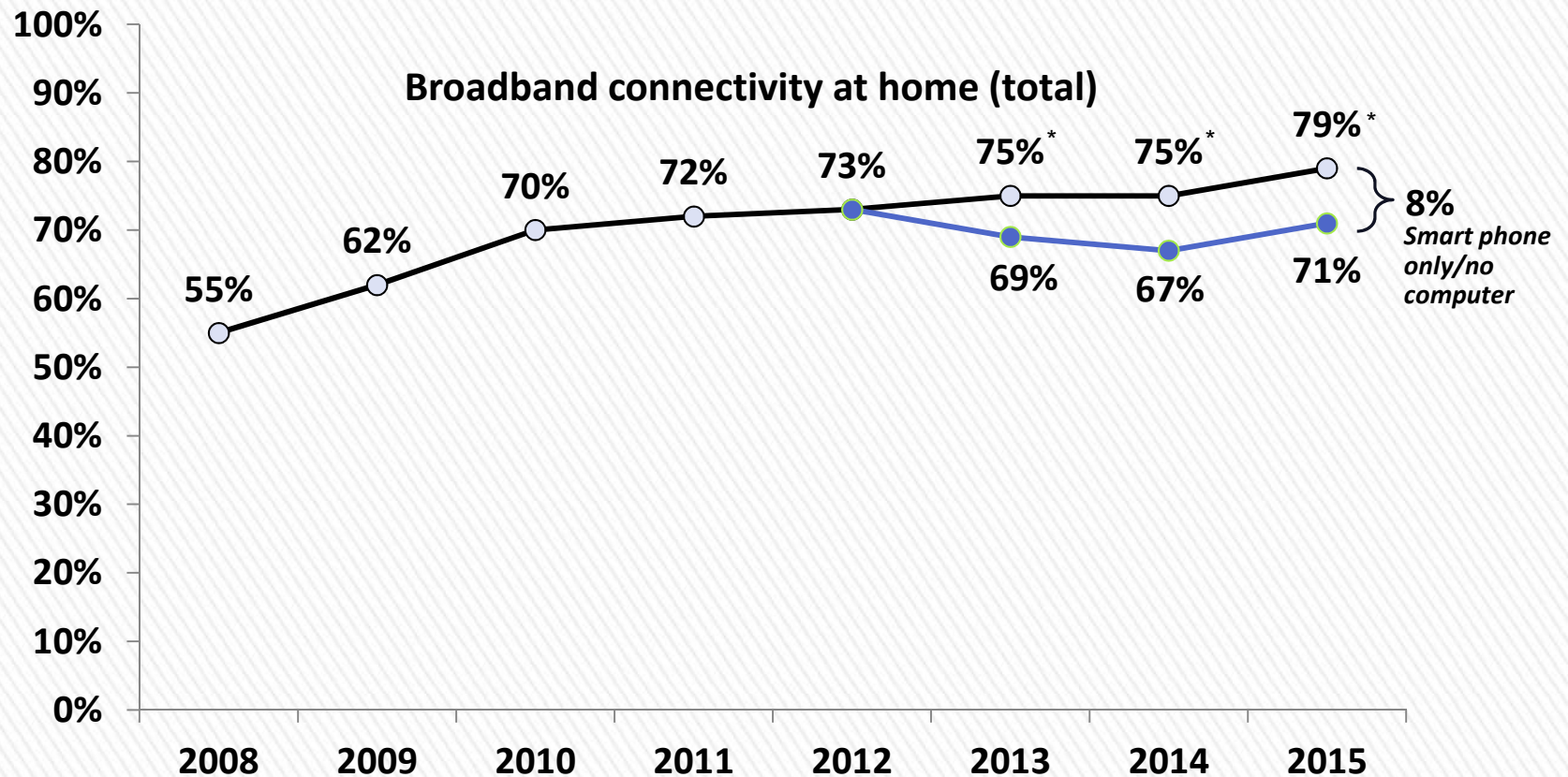


Table 4

Trend of California households with broadband connectivity (2008 - 2015)

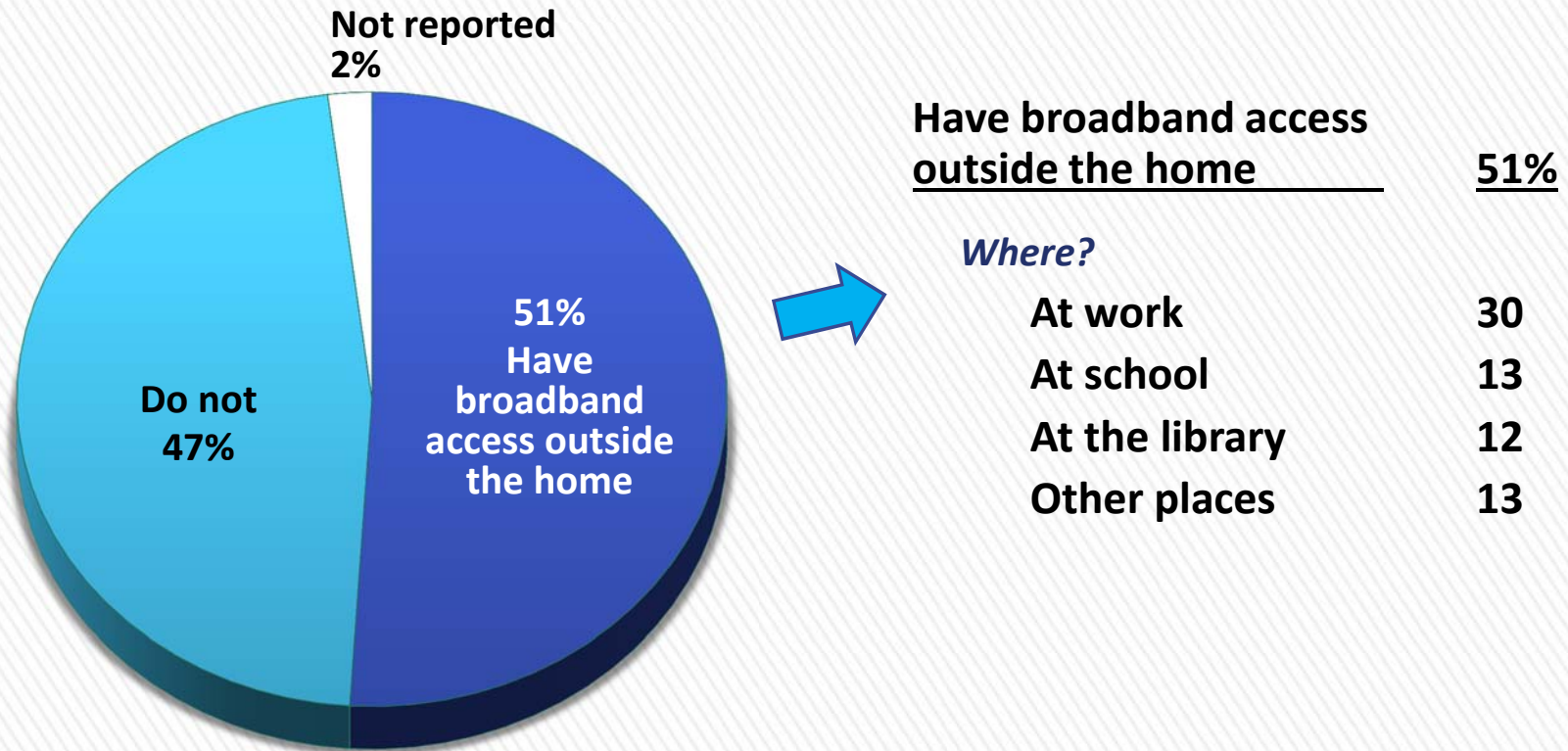


* For all years prior to 2013, broadband Internet connectivity included those accessing the Internet through DSL, cable, satellite or fiber optic connections to a home desktop, laptop or tablet computer. For 2013 and thereafter, this also includes those connecting to the Internet at home solely through a smart phone.

Source: 2015 and 2014 surveys conducted for the California Emerging Technology Fund by The Field Poll, while prior years' surveys conducted by the Public Policy Institute of California.

Table 5a

Access to broadband connectivity through a computer outside the home *(among California adults)*

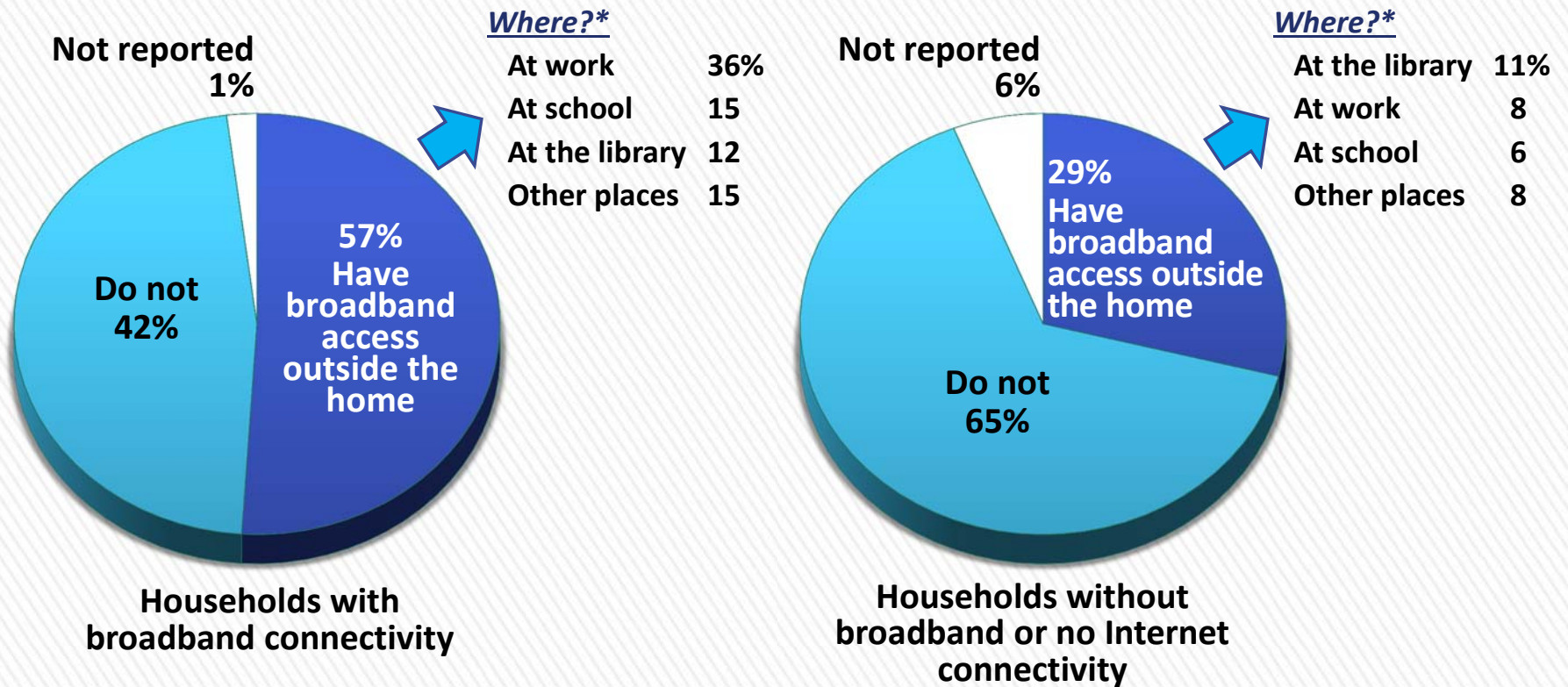


Note: Sum of places where adults report having broadband access adds to more than subtotal due to multiple mentions.

Table 5b

Access to broadband connectivity through a computer outside the home

(among adults with and without broadband connectivity at home)



* Percentages add to more than subtotal with broadband access outside the home due to multiple mentions.

Table 6

Access to broadband connectivity either at home or outside the home

