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PPIC STATEWIDE SURVEY

CALIFORNIA

Californians & information technology

in collaboration with
The California Emerging
Technology Fund

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PPIC

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INSTITUTE OF CALIFORNIA

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ABOUT THE SURVEY

The PPIC Statewide Survey series provides policymakers, the media, and the general public with objective, advocacy-free information on the perceptions, opinions, and public policy preferences of California residents. Inaugurated in April 1998, this is the 87th PPIC Statewide Survey in a series that has generated a database that includes the responses of more than 185,000 Californians. This survey is the first in a new five-year PPIC Statewide Survey series focusing on information technology issues, funded with grants from the California Emerging Technology Fund and from ZeroDivide. The series' intent is to inform state policymakers, encourage discussion, and raise public awareness about a variety of information technology issues. For this benchmark survey, we draw upon earlier PPIC Statewide Surveys for California trends over time and recent surveys by the Pew Internet & American Life Project for national comparisons.

Although the use of the Internet and information technology is expanding nationally, with California a global leader in this arena, we know from past studies that a number of large and important subgroups in the California population do not have access to information technology. Given the role of the Internet in modern society, and the reality of the digital divide, this survey seeks to inform and improve public policy choices involving this disjunction between large populations who are and are not “connected.” We examine both access and use of information technology as well as the public’s perceptions and attitudes.

This survey presents the responses of 2,503 adult residents interviewed in multiple languages and reached by landline and cellular telephone throughout the state, on the following topics:

- Access and use of information technology, including computer ownership, home Internet and broadband connections, and overall use of computers, the Internet, and email. We also ask about a variety of specific activities that are conducted on the Internet, how often residents access the Internet or email, what kind of Internet connection they have at home, and other issues related to home broadband adoption. We ask about the manner in which the Internet is used outside home and work, the use of mobile devices for the Internet and other purposes, and parents’ use of the Internet to connect to their children’s schools.
- Perceptions and attitudes regarding information technology, including the importance of access to the Internet, the importance of the Internet as a source of information in daily life, the role of government in Internet regulation and in improving the access and availability of broadband Internet technology, and residents’ comfort with and confidence in technology. We also ask about whether Californians in lower-income and rural areas are less likely to have access to broadband Internet technology and the level of concern regarding these access issues.
- California trends over time and differences between Americans nationally and Californians in access, uses, perceptions, and attitudes about information technology.
- Variations in behaviors, perceptions, and attitudes regarding information technology issues across the five major regions of the state (Central Valley, San Francisco Bay Area, Los Angeles County, Inland Empire, and Orange/San Diego Counties), among Asians, blacks, Latinos, and non-Hispanic whites, between urban and rural communities, and among socioeconomic and political groups.

Copies of this report may be ordered online (www.ppic.org) or by phone (415-291-4400). For questions about the survey, please contact survey@ppic.org. View our searchable PPIC Statewide Survey database online at <http://www.ppic.org/main/survAdvancedSearch.asp>.

PRESS RELEASE

Para ver este comunicado de prensa en español, por favor visite nuestra página de internet:
<http://www.ppic.org/main/pressreleaseindex.asp>

PPIC STATEWIDE SURVEY: CALIFORNIANS AND INFORMATION TECHNOLOGY

More Shop, Get News Online – Yet Digital Divide Widens

AS CALIFORNIANS BROADEN USE OF WEB, LATINO AND LOW-INCOME RESIDENTS LEFT BEHIND

SAN FRANCISCO, California, June 25, 2008 — At least half of Californians go online to get news, make purchases, look for health information, or visit government websites. But as the state's residents integrate the Internet into their daily lives, there are signs that the digital divide is widening for some groups, particularly Latino and low-income residents. These are among the key findings in a statewide survey released today by the Public Policy Institute of California (PPIC) in collaboration with the California Emerging Technology Fund.

Californians value access to the web: Nearly all Internet users (92%) say it is at least somewhat important in everyday life, and even 56 percent of those who don't go online agree. But disparities in Californians' use of technology reveal a digital divide: Residents who are white, black, or over age 55 have significantly increased their use of computers and the Internet since 2000, while Latinos, Asians, and low-income residents have not.

"Many Californians go online to research the decisions they make as voters, taxpayers, and consumers," says Mark Baldassare, PPIC president and CEO. "Yet there are tremendous differences in access to critical information that put many at a disadvantage in their everyday lives. At a time when technology's role is growing and in a state that has led the way, this poses a major policy challenge."

COMPUTER USE SIMILAR IN CALIFORNIA AND NATION

Three in four Californians (75%) use a computer at home, school, or work, a statistic that has held steady since 2000. A 2008 survey by the Pew Internet & American Life Project found similar results (74%) nationwide. The percentage of Californians who use the Internet has increased since 2000, from 65 percent to 70 percent. Today, Californians and adults across the nation are equally likely to have Internet access at home (63% vs. 62% in the 2008 Pew survey) and a broadband connection (55% each).

WHITE, BLACK, OLDER CALIFORNIANS INCREASE USE

Differences emerge in the way demographic groups use technology.

- **Race/ethnicity:** Since 2000, computer use has grown among whites (79% to 85%) and blacks (76% to 83%), as has Internet use (70% to 81% for whites, 60% to 82% for blacks). Among Latinos, computer use has declined (64% to 58%) and Internet use is unchanged (47% to 48%). Asians have seen declines in both their use of computers (91% to 81%) and the Internet (84% to 80%).
- **Age and income:** Internet use has grown sharply among those age 55 and older (42% to 58%), but not among adults with household incomes less than \$40,000 (47% to 49%). Adults under age 35 are more likely to use the Internet (78%) than older adults. Almost all adults with household incomes of \$80,000 or more use computers (94%) and the Internet (92%).

FEWER LATINOS HAVE COMPUTERS, WEB ACCESS AT HOME

A digital divide is also apparent among ethnic/racial groups, income levels, and regions when comparing rates of computer ownership, Internet access, and broadband connections at home.

- **Race/ethnicity:** Less than half of Latinos (48%) have home computers compared to about eight in 10 or more for whites (86%), Asians (84%), and blacks (79%). Just four in 10 Latinos (40%) have Internet access and a third (34%) broadband connection at home. In contrast, majorities in other racial or ethnic groups have both Internet access and broadband.
- **Income:** Among households with incomes under \$40,000, half have home computers, but only four in 10 (40%) have home Internet access and just a third (33%) have broadband. At higher income levels, overwhelming majorities of Californians have home computers, Internet access, and broadband.
- **Region:** Majorities in each region of the state say they have home computers and Internet access, but Los Angeles residents report lower rates of broadband connection (48%) than residents in the San Francisco Bay Area (65%), Orange County/San Diego (58%), Inland Empire (56%), and Central Valley (53%). Rural residents are somewhat less likely than urban residents to have a computer (65% vs. 73%), Internet connection (58% vs. 63%), or broadband (51% vs. 56%).

WHAT ARE CALIFORNIANS DOING ONLINE?

Californians are far more likely than they were in 1999 (PPIC Statewide Survey: Californians and Their Government, September 1999) to report that they go online to shop (52% vs. 30% in 1999) or get news about current events (55% vs. 43% in 1999), and slightly more likely to seek information about their work or jobs (49% vs. 45% in 1999). Half of Californians (50%) look for health information online or visit government websites. Less than half (47%) bank or manage finances online or look for community events and activities (47%). Fewer go online to use government resources, such as downloading forms (43%); get housing or real estate information (40%); engage in education activities, such as taking a class (27%); or use social networking sites (26%), such as Facebook, MySpace, or LinkedIn.

Stark differences emerge in the way demographic groups use the Internet. Latinos are more likely than they were in 1999 to go online for news (35% vs. 28%), but far less likely to do so than whites (67%), blacks (62%), and Asians (61%). Comparing age groups, most people under age 35 (62%) and between ages 35 and 54 (61%) get news online, compared to 41 percent of residents age 55 and older.

While more Latinos report shopping on the web today (29% vs. 16% in 1999), they are far less likely than whites (67%), blacks (63%), or Asians (58%) to research or make purchases online. Among other differences:

- **Health information:** While half of Californians say they get health information online, lower income adults (30%) and Latinos (31%) are the least likely to do so.
- **Social networking:** Half of residents under age 35 use social networking sites, compared to 20 percent in the 35-54 age group and 8 percent of adults over age 55.
- **School websites:** More than half of parents (56%) visit their children's school websites. However, only 30 percent of those with household incomes under \$40,000 do so, compared to 84 percent of those with incomes of \$80,000 or more.

WHO'S TEXTING?

Some experts have suggested that mobile devices may be the platform to bridge the digital divide because a phone and service plan costs less than a computer and Internet connection. In California, 75 percent of all adults and solid majorities in all demographic categories have cell phones. Whites (83%) and blacks (78%) are more likely than Asians (72%) and Latinos (63%) to have cell phones.

Nearly six in 10 use their cell phones to send or receive text messages, and younger residents (87%) are the most likely to do so. They are also the most likely to use their cell phones for email or to access the Internet. Overall, one in four Californians uses cell phones for email (26%) or to go online (25%).

MORE KEY FINDINGS:

More have DSL connections – Page 12

To access the Internet, 29 percent have DSL, 19 percent have cable modems, 5 percent have wireless, and 2 percent have fiber optic or T-1 connections. Just 7 percent have dial-up connections.

Most say cities should provide free wireless – Page 19

As local governments consider the benefits and difficulties of providing free wireless Internet access, 67 percent of Californians say it is a good idea and 26 percent say it is a bad one.

Comfort with technology, worries about security – Pages 20, 21

Internet users are comfortable using technology but less confident that they can keep viruses and spyware out of their computers. They're even less confident about the security and privacy of financial transactions online.

Californians concerned about digital divide – Page 22

Two-thirds (65%) think Californians in lower-income areas are less likely to have broadband Internet access, and nearly as many (62%) are at least somewhat concerned about the disparities.

ABOUT THE SURVEY

This is the first survey in a series on public opinion and information technology conducted with funding from the California Emerging Technology Fund and ZeroDivide. The report is based on a telephone survey of 2,503 California adult residents, including 2,253 interviewed on landline telephones and 250 on cell phones, conducted between June 3 and June 17, 2008. Interviews were conducted in English, Spanish, Chinese (Mandarin or Cantonese), Vietnamese, and Korean. The sampling error for the 2,503 adults is +/- 2%. The sampling error for subgroups is larger. For more information on methodology, see page 25.

Mark Baldassare is president and CEO of PPIC, where he holds the Arjay and Frances Fearing Miller Chair in Public Policy. He is founder of the PPIC Statewide Survey which he has directed since 1998. This is the 87th PPIC Statewide Survey in a series that has generated a database that includes the responses of more than 185,000 Californians.

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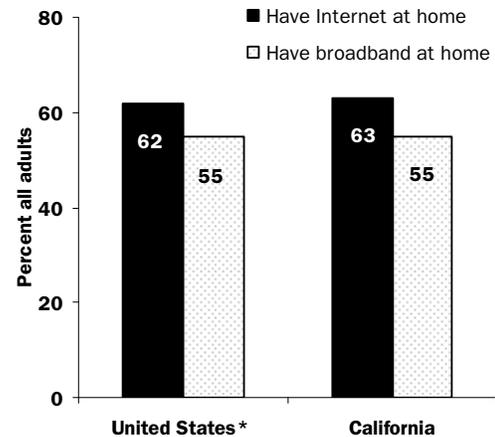
This report and a related *Just the Facts: The Digital Divide* will appear on PPIC's website (www.ppic.org) after 10 p.m. on June 25, 2008.

ACCESS AND USE

KEY FINDINGS

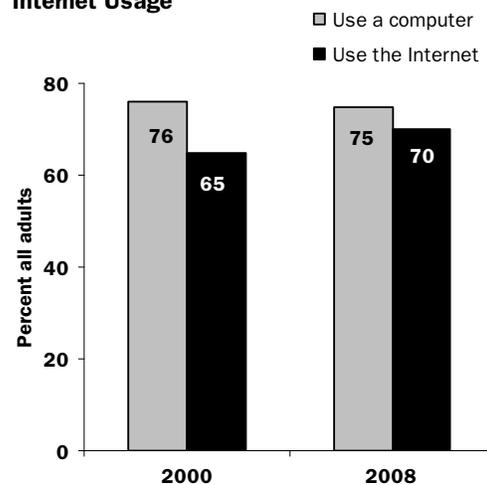
- Although the percentage of Californians using computers has not grown since 2000, the share who say they use the Internet has increased five points. Californians' usage is also similar to that of adults nationwide. Racial/ethnic, regional, and demographic disparities in ownership and computer use point to a digital divide in California. (pages 8, 9)
- At least half of Californians are using the Internet to get news, buy goods and services, get medical information, and visit government websites. There are large differences in specific uses of the Internet across racial/ethnic, income, and regional groups. Young adults are more likely to do social networking online. (pages 10, 11)
- DSL-enabled phone lines are the most common type of broadband Internet connection in the homes of California Internet users. Most say they like broadband because of the faster access and greater speed. (pages 12, 13)
- Many cell phone users, especially those under 34, are sending and receiving text messages on their phones, while just one in four use them to access the Internet or send emails. Internet use outside of home and work is most common among upper-income and younger Californians. (pages 14, 15)
- Half of California parents with school-age children visit their children's school websites and three in 10 get homework assignments through the Internet or by email. Income and racial/ethnic disparities point to a digital divide among parents of school-age children. (page 16)

Internet Access and Broadband at Home

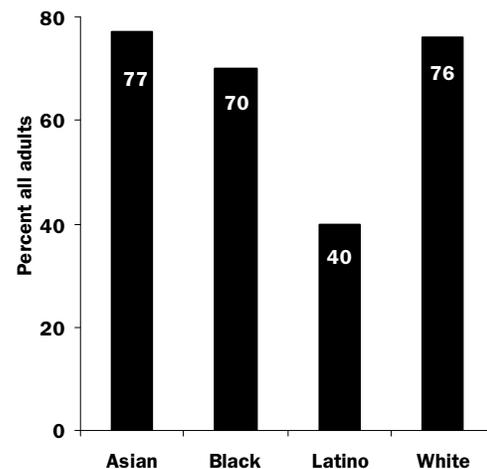


*Pew Internet & American Life Project

Californians' Overall Computer and Internet Usage



Californians with Internet in the Home



COMPUTER AND INTERNET ACCESS AT HOME

Large majorities of Californians today report that they have a computer (72%) and Internet access at home (63%). Californians are just as likely as residents nationwide to have Internet access at home (63% to 62%), according to a 2008 Pew Internet & American Life Project survey, and are just as likely to have broadband at home (55% each). (Broadband users are defined as having a DSL, cable, wireless, T-1, or fiber-optic Internet connection.) More Californians have computers at home today than in 1999 (63%); a similar comparison for Internet access at home is not available.

A digital divide is apparent today when comparing rates of home computer ownership, Internet connection, and broadband access across demographic groups. Fewer than half of Latinos (48%) report having a computer at home, compared to about eight in 10 or more whites (86%), Asians (84%), and blacks (79%). The same trends hold for having an Internet connection and broadband service. Lower-income respondents are also less likely to have a computer (50%), Internet access (40%), or home broadband service (33%), while almost all adults earning over \$80,000 a year have a computer (97%), Internet access at home (90%), and a broadband connection (85%). Adults over 55 are less likely to report having a computer (67%), an Internet connection at home (53%), or home broadband service (44%) than adults under 35 (71%, 68%, and 60%, respectively).

A regional disparity is also apparent: Los Angeles residents (48%) report having a broadband connection at a lower rate than do San Francisco Bay Area residents (65%). Residents in rural areas are also somewhat less likely to have a computer, Internet access, or broadband connection at home.

What is the main reason that adults do not have a computer at home? Thirty-seven percent say the cost of a computer, while fewer say they do not want one (22%) or they do not know how to use one (21%).

“Do you have...”

| Percent saying yes | | ... any type of personal computer, including laptops, in your home? | ... an Internet connection at home? | ...a broadband connection at home? |
|-----------------------|-------------------------------|---|-------------------------------------|------------------------------------|
| All Adults | | 72% | 63% | 55% |
| Age | 18-34 | 71 | 68 | 60 |
| | 35-54 | 77 | 67 | 61 |
| | 55 and over | 67 | 53 | 44 |
| Income | Under \$40,000 | 50 | 40 | 33 |
| | \$40,000 to \$79,999 | 84 | 76 | 64 |
| | \$80,000 or more | 97 | 90 | 85 |
| Race/Ethnicity | Asian | 84 | 77 | 67 |
| | Black | 79 | 70 | 66 |
| | Latino | 48 | 40 | 34 |
| | White | 86 | 76 | 68 |
| Region | Central Valley | 68 | 62 | 53 |
| | San Francisco Bay Area | 79 | 71 | 65 |
| | Los Angeles | 67 | 55 | 48 |
| | Orange/San Diego | 75 | 66 | 58 |
| | Inland Empire | 73 | 63 | 56 |
| Community | Rural | 65 | 58 | 51 |
| | Urban | 73 | 63 | 56 |

OVERALL COMPUTER AND INTERNET USAGE

Three in four Californians report using a computer at home, school, or work (75%) and seven in 10 access the Internet (70%). Overall computer use today is similar to 2000 (76% 2000, 75% today), but Internet use has increased somewhat (65% to 70%). According to the 2008 Pew Internet & American Life Project survey, Californians and adults nationwide today are similar in computer use (75% to 74%) and Internet use (70% to 73%).

Mirroring the divide in computer ownership and Internet access at home, a gap in overall computer and Internet use is evident across demographic groups. Whites (85%), blacks (83%), and Asians (81%) are again far more likely than Latinos (58%) to use a computer. In addition, about six in 10 Californians (58%) who earn less than \$40,000 annually report that they use a computer, while almost all adults who earn more than \$80,000 (94%) use a computer. Adults younger than 35 are the age group most likely to report using a computer (83%) or the Internet (78%), while adults 55 and over are the least likely (62%, and 58%, respectively).

Across the state's regions, Los Angeles residents have the lowest rate of computer and Internet usage (70% and 61%, respectively), while the San Francisco Bay Area has the highest (81% and 77%). The rate of computer use is higher in urban areas (76%) than in rural communities (66%) and the Internet is also used at higher rate within urban communities (70% to 63%)

| Percent saying yes | | Computer Use | Internet Use |
|--------------------|------------------------|--|---|
| | | Do you ever use a computer at home, at work, or at school? | Do you ever go online to access the Internet or worldwide web or send or receive email? or Do you send or receive email, at least occasionally? |
| | All Adults | 75% | 70% |
| | Age | | |
| | 18-34 | 83 | 78 |
| | 35-54 | 78 | 73 |
| | 55 and over | 62 | 58 |
| | Income | | |
| | Under \$40,000 | 58 | 49 |
| | \$40,000 to \$79,999 | 86 | 83 |
| | \$80,000 or more | 94 | 92 |
| | Race/Ethnicity | | |
| | Asian | 81 | 80 |
| | Black | 83 | 82 |
| | Latino | 58 | 48 |
| | White | 85 | 81 |
| | Region | | |
| | Central Valley | 74 | 71 |
| | San Francisco Bay Area | 81 | 77 |
| | Los Angeles | 70 | 61 |
| | Orange/San Diego | 77 | 73 |
| | Inland Empire | 73 | 70 |
| | Community | | |
| | Rural | 66 | 63 |
| | Urban | 76 | 70 |

SPECIFIC INTERNET ACTIVITIES

At least half of Californians use the Internet for getting news and information on current events (55%), to buy goods and services (52%), to get health and medical information (50%), and to visit a state, local, or federal government website (50%). Just under half use the Internet for information for their work or job (49%), to bank or manage finances online (47%), to get information about activities or events in their community (47%), or to get news and information about politics or the 2008 campaigns (46%). Fewer residents report going online to access government resources such as downloadable forms (43%), to get housing and real estate information (40%), for educational activities such as taking a class (27%), or to use a social networking site (26%).

Compared to 1999, Californians are far more likely now to report going online for shopping (30% 1999, 52% today) and to get news about current events (43% 1999, 55% today); residents are slightly more likely now to go online for information for their work or job (45% 1999, 49% today).

In recent surveys conducted by the Pew Research Center, Internet users nationwide are less likely than California's Internet users to report going online for certain activities. Seventy-nine percent of California Internet users have gone online to get news and information about current events, compared to 71 percent nationwide. The pattern is similar for going online to get news or information about politics or the 2008 campaigns (65% of California Internet users to 55% U.S. Internet users), online shopping (75% to 66%), visiting government websites (71% to 66%), going online for information about their work or job (70% to 47%), to bank or manage finances (67% to 53%), and for educational purposes such as taking a class (39% to 12%).

**“Please tell me if you ever use the Internet to do any of the following things:
How about going online ...”**

| Percent saying yes | | ...to get news on current events? | ...to purchase goods and services? | ...to get health or medical information? | ...to visit a government website? | ...for information for your work or job? | ...to do any banking? |
|-----------------------|-------------------------------|-----------------------------------|------------------------------------|--|-----------------------------------|--|-----------------------|
| All Adults | | 55% | 52% | 50% | 50% | 49% | 47% |
| Age | 18-34 | 62 | 56 | 54 | 54 | 60 | 54 |
| | 35-54 | 61 | 57 | 54 | 54 | 55 | 51 |
| | 55 and over | 41 | 43 | 43 | 41 | 29 | 35 |
| Income | Under \$40,000 | 34 | 27 | 30 | 27 | 30 | 26 |
| | \$40,000 to \$79,999 | 68 | 63 | 60 | 65 | 58 | 58 |
| | \$80,000 or more | 79 | 84 | 74 | 75 | 74 | 74 |
| Race/Ethnicity | Asian | 61 | 58 | 55 | 56 | 58 | 57 |
| | Black | 62 | 63 | 52 | 60 | 47 | 55 |
| | Latino | 35 | 29 | 31 | 27 | 34 | 28 |
| | White | 67 | 67 | 62 | 64 | 58 | 58 |
| Region | Central Valley | 50 | 50 | 51 | 50 | 49 | 43 |
| | San Francisco Bay Area | 66 | 62 | 57 | 60 | 57 | 55 |
| | Los Angeles | 49 | 44 | 45 | 42 | 43 | 41 |
| | Orange/San Diego | 60 | 60 | 51 | 54 | 53 | 55 |
| | Inland Empire | 50 | 47 | 49 | 46 | 43 | 44 |
| Community | Rural | 48 | 47 | 46 | 46 | 45 | 42 |
| | Urban | 55 | 53 | 51 | 50 | 49 | 47 |

SPECIFIC INTERNET ACTIVITIES (CONTINUED)

Despite California's overall higher rate of Internet activity, reports of Internet activity are significantly different across racial/ethnic and demographic subgroups, pointing again to a digital divide within the state. Lower-income Californians, Latinos, and older residents are overwhelmingly less likely than others to rely on the Internet for typical uses, with fewer than half reporting that they do so. Lower-income residents (30%) and Latinos (31%) are also far less likely than others to say they use the Internet to get health or medical information. Also, when it comes to online shopping, residents with annual household incomes over \$80,000 (84%) and incomes between \$40,000 and \$80,000 (63%) are significantly more likely than those with incomes under \$40,000 (27%) to say they have done this. And while just 29 percent of Latinos report shopping online, solid majorities of Asians (58%), blacks (63%), and whites (67%) say they do. As income and education levels rise, residents are much more likely to say they bank online, get news online, and get information for their jobs online.

As for regional differences, San Francisco Bay Area residents are much more likely than Los Angeles residents to have been engaged in a variety of online activities, including getting news on current events, shopping, getting medical information, visiting a government website, and doing banking. Rural residents lag somewhat behind urban residents in most Internet activities.

Half of residents under 35 are using a social networking site while 20 percent of 35–54 year olds and just 8 percent of those 55 and older do so.

**“Please tell me if you ever use the Internet to do any of the following things:
How about going online ...”**

| <i>Percent saying yes</i> | | ...to get information about your community? | ...to get news or information about politics? | ...to access government resources? | ...to get housing or real estate information? | ...for your education? | ...to use a social networking site? |
|---------------------------|-------------------------------|--|--|---|--|-------------------------------|--|
| All Adults | | 47% | 46% | 43% | 40% | 27% | 26% |
| Age | 18-34 | 52 | 52 | 45 | 44 | 43 | 52 |
| | 35-54 | 52 | 50 | 47 | 47 | 26 | 20 |
| | 55 and over | 36 | 33 | 35 | 28 | 11 | 8 |
| Income | Under \$40,000 | 30 | 27 | 23 | 24 | 20 | 26 |
| | \$40,000 to \$79,999 | 56 | 57 | 54 | 47 | 31 | 27 |
| | \$80,000 or more | 71 | 65 | 66 | 60 | 37 | 29 |
| Race/Ethnicity | Asian | 54 | 47 | 52 | 47 | 35 | 37 |
| | Black | 59 | 54 | 49 | 52 | 36 | 37 |
| | Latino | 29 | 29 | 22 | 22 | 21 | 22 |
| | White | 57 | 55 | 54 | 50 | 27 | 25 |
| Region | Central Valley | 43 | 38 | 41 | 38 | 29 | 26 |
| | San Francisco Bay Area | 59 | 56 | 52 | 47 | 26 | 30 |
| | Los Angeles | 40 | 42 | 35 | 34 | 25 | 25 |
| | Orange/San Diego | 53 | 50 | 52 | 42 | 28 | 27 |
| | Inland Empire | 42 | 39 | 39 | 37 | 28 | 29 |
| Community | Rural | 41 | 40 | 38 | 39 | 20 | 18 |
| | Urban | 48 | 46 | 43 | 40 | 27 | 27 |

FREQUENCY OF INTERNET USAGE

Four in 10 California Internet users go online or check email several times a day when at home; 43 percent go online several times a day from work. Sixty-six percent of California Internet users go online less frequently—once a day or more—from home. Fifty-two percent go online once a day or more from work. Very few Internet users go online or check email frequently outside home or work.

California Internet users today are more likely than those nationally to use the Internet or email from home at least once a day (66% to 58%). They are only slightly more likely than national users to use the Internet or email from work at least once a day (52% to 44%), according to the 2008 Pew survey.

“About how often do you use the Internet or email from...”

| <i>Internet users only</i> | ...home? | ...work? | ... some place other than home or work? |
|----------------------------|----------|----------|---|
| Several times a day | 41% | 43% | 8% |
| About once a day | 25 | 9 | 6 |
| 3-5 days a week | 13 | 5 | 6 |
| 1-2 days a week | 9 | 4 | 8 |
| Every few weeks | 3 | 1 | 7 |
| Less often | 3 | 5 | 24 |
| Never (volunteered) | 6 | 33 | 41 |

INTERNET CONNECTION AT HOME

Sixty-three percent of California residents report having some type of Internet connection at home. Fifty-five percent have a broadband connection—including 29 percent with a DSL connection, 19 percent with a cable modem, 5 percent with wireless, and 2 percent with a fiber optic or a T-1 connection. Only 7 percent report having a dial-up connection. Californians are just as likely as Americans nationwide to have broadband at home (55% each), according to the 2008 Pew survey.

The adoption of broadband in the home varies greatly by income and education level, varies slightly by urban and rural location, and is twice as high among whites as Latinos (68% to 34%). Adults 55 years and older (44%) are less likely than others to have broadband. Broadband use is highest in the San Francisco Bay Area (65%) and lowest in the Central Valley (53%) and Los Angeles County (48%).

“What kind of Internet connection do you have at home? Do you use a dial-up telephone line, or do you have some other type of connection, such as a DSL-enabled phone line, a cable TV modem, a wireless connection, a fiber optic connection such as FiOS or a T-1?”

| | All Adults | Household Income | | | Community | |
|-------------------------------------|------------|------------------|----------------------|------------------|-----------|-------|
| | | Under \$40,000 | \$40,000 to \$79,999 | \$80,000 or more | Rural | Urban |
| Dial-up telephone line | 7% | 7% | 11% | 5% | 6% | 7% |
| DSL-enabled phone line | 29 | 18 | 35 | 43 | 27 | 29 |
| Cable modem | 19 | 11 | 23 | 29 | 15 | 20 |
| Wireless connection | 5 | 3 | 4 | 9 | 6 | 5 |
| Fiber optic or T-1 | 2 | - | 2 | 4 | 3 | 2 |
| Other (volunteered) | 1 | 1 | - | 1 | 1 | 1 |
| No Internet/computer at home | 36 | 60 | 23 | 9 | 42 | 35 |
| Don't know | 1 | - | 2 | - | - | 1 |

BROADBAND ADOPTION

When asked what they like most about having a high-speed Internet connection, seven in 10 broadband users mention faster access or greater speed. Far fewer broadband users cite other reasons. More than six in 10 across racial/ethnic, income, age, and regional groups hold this view.

“What do you like most about having a high-speed Internet connection at home?”

| <i>Broadband users only</i> | All Broadband Users | Race/Ethnicity | | Income | | |
|--|---------------------------|----------------|-------|-------------------|-------------------------|-----------------------|
| | | Latino | White | Under \$40,000 | \$40,000 to \$79,999 | \$80,000 and above |
| Faster access/greater speed | 71% | 74% | 72% | 70% | 68% | 74% |
| Convenience in general | 11 | 11 | 11 | 11 | 12 | 11 |
| Easier to check email/easier to communicate | 3 | 2 | 2 | 4 | 3 | 2 |
| Doing job-related tasks from home/working from home | 2 | 2 | 2 | 1 | 2 | 3 |
| Downloading all types of files faster | 2 | 1 | 2 | 2 | 2 | 1 |
| The 'always on' connection | 2 | 2 | 2 | 2 | 3 | 3 |
| Other (volunteered) | 7 | 5 | 7 | 8 | 7 | 4 |
| Don't know | 2 | 3 | 2 | 2 | 3 | 2 |

Of those who have broadband, nearly six in 10 say they subscribe to basic service, while about three in 10 subscribe to a premium service that promises faster speed. Subscribing to premium service increases with income and age. Whites (32%) are somewhat more likely than Latinos (25%) to subscribe to premium service. Fewer than four in 10 broadband users in individual regions subscribe to premium service, with residents in the Inland Empire (37%) the most likely to do so.

“Thinking about your high-speed Internet service at home, do you subscribe to a basic broadband service, or do you pay extra for a premium service that promises faster speed?”

| <i>Broadband users only</i> | All Broadband Users | Race/Ethnicity | | Income | | |
|---|---------------------------|----------------|-------|-------------------|-------------------------|-----------------------|
| | | Latino | White | Under \$40,000 | \$40,000 to \$79,999 | \$80,000 and above |
| Subscribe to basic service | 58% | 64% | 56% | 66% | 59% | 55% |
| Subscribe to premium service at higher price | 31 | 25 | 32 | 24 | 32 | 33 |
| Don't know | 11 | 11 | 12 | 10 | 9 | 12 |

Among Internet users who do not have a broadband connection in their home, 74 percent say that high-speed Internet service is available in their neighborhood. Asked if they would like to have a faster broadband connection, seven in 10 dial-up users say they are not interested. When asked what it would take for them to switch to broadband, 35 percent of these dial-up users say that the price of broadband would have to be lower, but one in four say they are simply not interested in switching to broadband.

MOBILE DEVICES

Seventy-five percent of California adults say they have a cell phone. While cell phone ownership increases with education and income, about six in 10 or more in all demographic groups have a working cell phone. Across racial/ethnic groups, whites (83%) and blacks (78%) are more likely than Asians (72%) and Latinos (63%) to have a cell phone. A majority of cell phone users (58%) say they use the device to send or receive text messages, while about one in four send or receive email (26%), or access the Internet (25%) with their mobile phone.

Use of a cell phone to send or receive text messages is highest by far among younger cell phone users (87% under 35, 57% 35–54, 23% age 55 and over). Across racial/ethnic groups, Latinos (63%) are more likely than whites (54%) to text-message (sample sizes for black and Asian cell phone users are too small for separate analysis). Majorities of cell phone users across income groups and regions report using their cell phones to send and receive text messages. Residents who have broadband Internet at home are more likely than those without to send or receive text messages on a cell phone.

When it comes to using their cell phones to send and receive email messages, younger cell phone users (39%) are more likely to do this than others. Upper-income cell phone users (30%) are slightly more likely than others (24% under \$40,000, 24% \$40,000–\$80,000), and Latinos slightly more likely than whites (29% to 23%), to use a cell phone for this purpose. Across regions, cell phone users in the San Francisco Bay Area are somewhat less likely to report this activity than those in other regions.

Using cell phones to access the Internet is another activity that has been adopted much more often by younger users (41% under 35, 23% 35–54, 9% 55 and over). Across racial/ethnic groups, Latinos (25%) and whites (22%) are similarly likely to use a cell phone for Internet access. Among cell phone users in California who use them to access the Internet, 15 percent do not have a home Internet connection, while 84 percent do.

“Do you ever use your cell phone to...”

| <i>Cell phone users only Percent saying yes</i> | <i>...send or receive text messages?</i> | <i>...send or receive email?</i> | <i>...to access the Internet?</i> |
|---|--|--------------------------------------|---------------------------------------|
| All Cell Phone Users | 58% | 26% | 25% |
| Age | 18-34 | 87 | 39 |
| | 35-54 | 57 | 26 |
| | 55 and over | 23 | 11 |
| Income | Under \$40,000 | 60 | 24 |
| | \$40,000 to \$79,999 | 56 | 24 |
| | \$80,000 or more | 62 | 30 |
| Race/Ethnicity | Latino | 63 | 29 |
| | White | 54 | 23 |
| Region | Central Valley | 58 | 27 |
| | San Francisco Bay Area | 57 | 23 |
| | Los Angeles | 60 | 28 |
| | Orange/San Diego Inland Empire | 59 | 29 |

INTERNET USE OUTSIDE OF HOME AND WORK

More than one in three California Internet users (35%) access the Internet from someplace other than work or home at least once every few weeks. Of these, 60 percent use a laptop computer with a wireless connection, 42 percent use a cell phone or handheld device, and 37 percent use a computer at a public library.

More affluent (52%) and younger Californians (62%) are also the most likely use a laptop through a wireless connection when going online outside work or home. Those in the San Francisco Bay Area and Los Angeles (65% each) are more likely to access the Internet using a laptop through a wireless connection. Of those who use a wireless laptop, 72 percent have used public WiFi or other public wireless Internet services. Of those using WiFi, 55 percent have mostly used free services, 9 percent have mostly used pay services, and 34 percent have used a mix of the two.

Using cell phones or handheld devices to access the Internet is most popular among younger (49%) and more affluent Californians (58%). Whites and Latino do so equally (41% each).

Less affluent Californians (51%) are more likely to use a computer at a public library to access the Internet. Latinos (40%) are far more likely than whites (28%) to do so.

Among all adults, accessing the Internet with a wireless laptop, a cell phone, or at the library is rare and infrequent (14%, 10%, and 9% respectively) across all age, income, race/ethnic, and regional groups.

“Now please think about the ways you accessed the Internet from someplace other than from home or from work. Did you access the Internet...”

| <i>Those who access the Internet outside of home or work only</i> | | <i>...using a laptop through a wireless connection?</i> | <i>...using a cell phone or handheld device such as a Blackberry?</i> | <i>...using a computer at a public library?</i> |
|---|---------------------------------------|---|---|---|
| <i>Percent saying yes</i> | | | | |
| Internet Users | | 60% | 42% | 37% |
| Age | 18-34 | 62 | 49 | 42 |
| | 35-54 | 60 | 38 | 30 |
| | 55 and over | 53 | 30 | 39 |
| Income | Under \$40,000 | 52 | 33 | 51 |
| | \$40,000 to \$79,999 | 47 | 34 | 43 |
| | \$80,000 or more | 73 | 58 | 20 |
| Race/Ethnicity | Latino | 57 | 41 | 40 |
| | White | 65 | 41 | 28 |
| Region | Central Valley | 48 | 44 | 31 |
| | San Francisco Bay Area | 65 | 39 | 41 |
| | Los Angeles | 65 | 44 | 39 |
| | Orange/San Diego Inland Empire | 60 | 48 | 39 |

CHILDREN, SCHOOLS, AND THE INTERNET

Communication with schools is a significant driver of Internet use among parents of school-age children. About half of high school parents (53%), elementary school parents (51%), or middle school parents (49%) visit the website of their child’s school often or sometimes.

“Do you ever visit the website of this child’s school?”

| | Elementary school parents | Middle school parents | High school parents |
|-----------------------|---------------------------|-----------------------|---------------------|
| Yes, often | 19% | 23% | 28% |
| Yes, sometimes | 32 | 26 | 25 |
| No | 49 | 51 | 47 |

Altogether, more than half (56%) of those with children in school report visiting the website of their children’s school. However, there are stark differences by race/ethnicity, with nearly three in four whites (74%) using the Internet for this purpose, compared to four in 10 Latinos (41%). The gap is even wider between income groups—only 30 percent of those with household incomes under \$40,000 visit their child’s school website, compared to 84 percent of those with incomes of \$80,000 or more.

“Do you ever visit the website of this child’s school?”

| | Parents | Income | | | Race/Ethnicity | |
|------------|---------|----------------|----------------------|------------------|----------------|-------|
| | | Under \$40,000 | \$40,000 to \$80,000 | \$80,000 or more | Latino | White |
| Yes | 56% | 30% | 63% | 84% | 41% | 74% |
| No | 44 | 70 | 37 | 16 | 59 | 26 |

Use of the Internet to get homework assignments increases with the child’s level of schooling. Among elementary school parents, only 18 percent access their child’s homework assignments via email. The rate rises to 28 percent for middle school parents and to 35 percent among high school parents.

“Do you ever receive this child’s homework assignments via the Internet or email?”

| | Elementary school parents | Middle school parents | High school parents |
|-----------------------|---------------------------|-----------------------|---------------------|
| Yes, often | 8% | 13% | 15% |
| Yes, sometimes | 10 | 15 | 20 |
| No | 82 | 72 | 65 |

Altogether, 28 percent of parents with children in school use the Internet to obtain their child’s homework assignments through email. Again, there are divisions apparent among demographic groups. Whites (34%) report receiving their children’s homework electronically much more often than do Latinos (20%). Similarly, parents with annual household incomes of \$80,000 or more are nearly three times more likely than parents with household incomes of under \$40,000 to use the Internet or email for a child’s homework.

“Do you ever receive this child’s homework assignments via the Internet or email?”

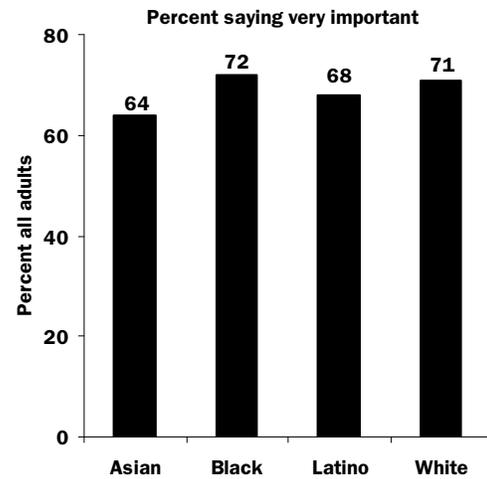
| | Parents | Income | | | Race/Ethnicity | |
|------------|---------|----------------|----------------------|------------------|----------------|-------|
| | | Under \$40,000 | \$40,000 to \$80,000 | \$80,000 or more | Latino | White |
| Yes | 28% | 15% | 30% | 41% | 20% | 34% |
| No | 72 | 85 | 70 | 59 | 80 | 66 |

PERCEPTIONS AND ATTITUDES

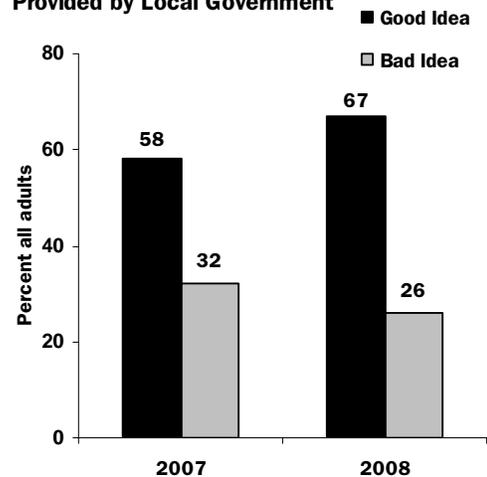
KEY FINDINGS

- Nearly seven in 10 Californians and strong majorities across demographic groups say it is very important for Californians to have Internet access. Most adults say the Internet is an important information source in their own daily lives, with younger, higher-income, and college-educated adults most likely to hold this view. (page 18)
- About two in three Californians today think that it would be a good idea for local governments to provide free wireless broadband Internet to all residents at no cost. About half say the government is doing just enough or more than enough to improve Internet access and to regulate the Internet. (page 19)
- Large majorities of Internet users say they are very comfortable with using the tools of modern information technology and getting information from the Internet. Most Internet users, however, are not very confident about keeping computer viruses out of their home computers, or that financial transactions on the Internet are secure and private. (pages 20, 21)
- Majorities of residents think that Californians in lower-income areas and rural areas have less access to broadband Internet technology than others, and majorities are also at least somewhat concerned about this. Awareness of this digital divide varies by income group, but not by rural status; concern varies by political group. (pages 22, 23)

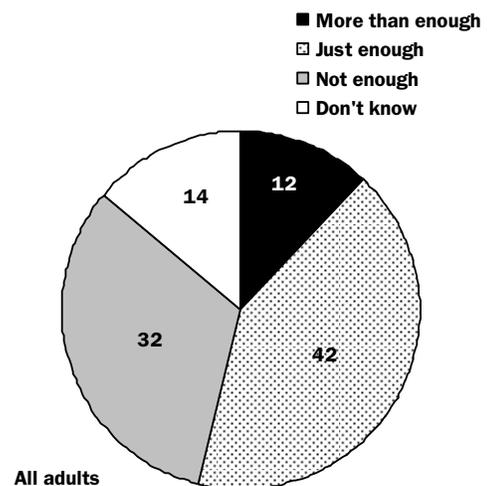
Perceived Importance of Californians Having Access to the Internet



Free Wireless Broadband Internet Provided by Local Government



Government Regulation of the Internet



PERCEPTIONS OF THE INTERNET

Nine in 10 residents say it is very important (69%) or somewhat important (21%) that Californians have Internet access, but what do they think about the role of the Internet in their own daily lives?

Half of Californians (51%) say the Internet is a very important information source, while another 29 percent say it is somewhat important, and fewer than one in five say it is not too (9%) or not at all (9%) important. The level of importance that Californians place on the Internet in their own lives rises with education and income, and decreases with older age. College graduates (61%), those with annual household incomes over \$80,000 (64%), and adults under 35 (61%) are the most likely to say the Internet is very important to them as a source of information in their everyday lives. Across racial/ethnic groups, Asians (57%) are somewhat more likely than blacks (53%), whites (51%), or Latinos (50%) to say the Internet is very important as a source of information. A high value placed on the Internet as an information source is similar among urban and rural residents, among U.S.- and foreign-born residents, among those with children 18 years or younger and those without children, and among men and women. Nearly all Californians who use the Internet (92%) say the Internet is at least somewhat important in everyday life, and even 56 percent of those who do not use the Internet agree with this statement.

“How important is the Internet as a source of information in your everyday life?”

| | | Very important | Somewhat important | Not too important | Not at all important | Don't know |
|-----------------------|-------------------------------|----------------|--------------------|-------------------|----------------------|------------|
| All Adults | | 51% | 29% | 9% | 9% | 2% |
| Age | 18-34 | 61 | 28 | 7 | 4 | - |
| | 35-54 | 55 | 29 | 9 | 5 | 2 |
| | 55 and over | 34 | 31 | 13 | 19 | 3 |
| Education | High school | 41 | 31 | 12 | 13 | 3 |
| | Some college | 56 | 29 | 8 | 7 | - |
| | College graduate | 61 | 27 | 7 | 5 | - |
| Income | Under \$40,000 | 43 | 30 | 14 | 11 | 2 |
| | \$40,000 to \$79,999 | 51 | 31 | 9 | 8 | 1 |
| | \$80,000 or more | 64 | 29 | 4 | 3 | - |
| Race/Ethnicity | Asian | 57 | 27 | 8 | 6 | 2 |
| | Black | 53 | 34 | 5 | 7 | 1 |
| | Latino | 50 | 29 | 11 | 9 | 1 |
| | White | 51 | 30 | 9 | 9 | 1 |
| Region | Central Valley | 48 | 30 | 10 | 10 | 2 |
| | San Francisco Bay Area | 52 | 31 | 9 | 7 | 1 |
| | Los Angeles | 53 | 27 | 9 | 10 | 1 |
| | Orange/San Diego | 48 | 33 | 9 | 9 | 1 |
| | Inland Empire | 53 | 28 | 10 | 8 | 1 |
| Community | Rural | 48 | 29 | 4 | 17 | 2 |
| | Urban | 51 | 29 | 10 | 8 | 2 |
| Use Internet | Yes | 61 | 31 | 6 | 2 | - |
| | No | 30 | 26 | 16 | 25 | 3 |

ROLE OF GOVERNMENT

With most residents saying that Internet access is important for Californians today, how do they feel about the government's role? A majority of Californians (54%) say the government is doing just enough (42%) or more than enough (12%) to regulate the Internet, while 32 percent say it is not doing enough, and 14 percent are undecided. Democrats (37%) are more likely than Republicans (28%) or independents (23%) to say that government is not doing enough to regulate the Internet.

When it comes to improving the access and availability of broadband Internet technology, a majority of Californians (51%) say the government is doing just enough (41%) or more than enough (10%), while 30 percent say it is not doing enough, and 19 percent are undecided. Findings among Internet users are similar to those of all adults.

Across parties, about four in 10 Republicans (43%), independents (40%), and Democrats (40%) say that government is doing just enough to improve broadband access, while Democrats (36%) and independents (33%) are more likely than Republicans (22%) to say government is not doing enough.

“Overall, thinking about the government’s role in improving the access and availability of broadband Internet technology, do you think the government is doing more than enough, just enough, or not enough?”

| | All Adults | Party | | | Internet Users | Likely Voters |
|-------------------------|------------|-------|-----|-----|----------------|---------------|
| | | Dem | Rep | Ind | | |
| More than enough | 10% | 7% | 14% | 9% | 10% | 11% |
| Just enough | 41 | 40 | 43 | 40 | 43 | 37 |
| Not enough | 30 | 36 | 22 | 33 | 31 | 31 |
| Don't know | 19 | 17 | 21 | 18 | 16 | 21 |

Some local governments have considered providing free wireless broadband Internet access to all their residents. Among Californians today, 67 percent say this is a good idea and 26 percent say it is a bad idea. Approval for providing free wireless access has increased since we first asked this question in March 2007 (58% good idea, 32% bad idea). Findings among Internet users are similar to all adults. A majority of likely voters say that local government providing wireless access is a good idea.

Democrats (75%) and independents (64%) are far more likely to say local government providing Internet access to residents is a good idea. Republicans are divided (45% good idea, 48% bad idea). Latinos (83%), blacks (81%), and Asians (75%) are more likely than whites (53%) to say it is a good idea. The belief that providing free wireless Internet access is a good idea is strong across most demographic groups, but declines as age, income, and education increase.

“Some local governments have considered providing wireless broadband Internet access to all residents at no cost. Is it a good idea or a bad idea for local governments to provide Internet access to its residents?”

| | All Adults | Party | | | Internet Users | Likely Voters |
|-------------------|------------|-------|-----|------|----------------|---------------|
| | | Dem | Rep | Ind. | | |
| Good idea | 67% | 75% | 45% | 64% | 66% | 57% |
| Bad idea | 26 | 19 | 48 | 27 | 28 | 35 |
| Don't know | 7 | 6 | 7 | 9 | 6 | 8 |

COMFORT WITH TECHNOLOGY

With most Californians saying the Internet is an important information source, nearly all (93%) Internet users describe themselves as at least somewhat comfortable. Sixty-two percent of Internet users say they are very comfortable with modern information technology, with even higher levels among college graduates (72%), younger residents (71%), and residents with annual household incomes of \$80,000 or more (73%). By contrast, just half of high school graduates (50%) and residents age 55 and older (48%) say they are very comfortable using technology.

Strong majorities of blacks (70%), Asians (62%), whites (62%), and Latinos (58%) all report being very comfortable using modern information technology. San Francisco Bay Area (67%) and Los Angeles (66%) residents are the most likely to say they are very comfortable, followed by residents in Orange/San Diego counties (64%), the Central Valley (59%), and the Inland Empire (53%). Men are somewhat more likely than women to say they are very comfortable (65% to 59%), while Californians with children 18 or younger are similar to residents without children in saying they are very comfortable (64% to 61%). U.S.- and foreign-born residents are also similarly likely to say they are very comfortable (62% to 61%). Broadband users are far more likely than non-broadband users to say they are very comfortable using the tools of modern information technology (66% to 44%).

“Overall, how comfortable are you using the tools of modern information technology?”

| <i>Internet users only</i> | Internet Users | Education | | | Age | | |
|-------------------------------|----------------|-------------|--------------|------------------|-------|-------|--------------|
| | | High School | Some College | College Graduate | 18-34 | 35-54 | 55 and above |
| Very comfortable | 62% | 50% | 59% | 72% | 71% | 63% | 48% |
| Somewhat comfortable | 31 | 40 | 33 | 23 | 26 | 30 | 38 |
| Not too comfortable | 5 | 8 | 6 | 3 | 2 | 6 | 9 |
| Not at all comfortable | 1 | 1 | 1 | 2 | - | 1 | 4 |
| Don't know | 1 | 1 | 1 | - | 1 | - | 1 |

Ninety-five percent of Internet users say they are very (70%) or somewhat comfortable (25%) using the Internet to get the information they need. Few Internet users say they are not too comfortable (3%) or not at all comfortable (1%). Men and women, and U.S.- and foreign-born residents report similarly high levels of comfort with using the Internet. Californians with children 18 or younger (73%) are somewhat more likely than residents without children under 18 (68%) to report they are very comfortable using the Internet. Comfort increases with higher income and education. Three in four broadband users (75%) say they are very comfortable using the Internet while just half of non-broadband users (50%) say so.

“Overall, how comfortable are you using the Internet to get the information needed in your everyday life?”

| <i>Internet users only</i> | Internet users | Income | | | Gender | |
|-------------------------------|----------------|----------------|-------------------|------------------|--------|-------|
| | | Under \$40,000 | \$40,000-\$79,999 | \$80,000 or more | Men | Women |
| Very comfortable | 70% | 59% | 67% | 82% | 71% | 69% |
| Somewhat comfortable | 25 | 34 | 26 | 16 | 24 | 25 |
| Not too comfortable | 3 | 3 | 5 | 2 | 3 | 3 |
| Not at all comfortable | 1 | 2 | 2 | - | 1 | 1 |
| Don't know | 1 | 2 | - | - | 1 | 2 |

CONFIDENCE IN TECHNOLOGY

While California Internet users report very high levels of comfort with using technology and the Internet, they are not as confident in their abilities to keep computer viruses, spyware, and adware out of their home computers. About seven in 10 say they are at least somewhat confident that they can do so when they want to, but only 32 percent say they are very confident about doing so.

Residents with at least some college education report higher levels of confidence than high school graduates in keeping things like computer viruses, spyware, and adware out of their home computers, while across age groups, Internet users under age 35 report the greatest levels of confidence. Across racial/ethnic groups, blacks (37%) and whites (35%) are more confident than Asians (29%) and Latinos (24%). Across demographic groups, men (35%) are somewhat more likely than women (29%), Californians without children (34%) are somewhat more likely than residents with children 18 or under (29%), and U.S.-born residents (34%) are somewhat more likely than foreign-born residents (27%) to say they are very confident about keeping things like computer viruses, spyware, and adware off their computers.

“Overall, how confident are you that you can keep things like computer viruses, spyware, and adware off of your home computer when you want to?”

| <i>Internet users only</i> | Internet Users | Education | | | Age | | |
|-----------------------------|----------------|-------------|--------------|------------------|-------|-------|--------------|
| | | High school | Some college | College graduate | 18-34 | 35-54 | 55 and above |
| Very confident | 32% | 25% | 37% | 34% | 37% | 29% | 30% |
| Somewhat confident | 41 | 38 | 43 | 41 | 38 | 41 | 44 |
| Not too confident | 17 | 22 | 12 | 17 | 16 | 20 | 15 |
| Not at all confident | 8 | 12 | 6 | 7 | 8 | 9 | 8 |
| Don't know | 2 | 3 | 2 | 1 | 1 | 1 | 3 |

When asked about the security and privacy of financial transactions on the Internet, 69 percent of California Internet users are at least somewhat confident that financial transactions on the Internet are secure and private, but just 26 percent say they are very confident. Confidence in the security and privacy of these transactions is highest among residents with household incomes of \$80,000 or more and among college graduates. Lower-income residents are twice as likely as upper-income residents to say they are very confident (40% to 20%). Men (29%) are somewhat more likely than women (23%) to say they are very confident about the security of online financial transactions. Across racial/ethnic groups, whites (29%) are the most likely to say they are very confident, followed by blacks (26%), Asians (22%), and Latinos (21%). Broadband users (30%) are significantly more likely than non-broadband users (11%) to say they are very confident about the security of online financial transactions.

“How confident are you that financial transactions on the Internet are secure and private?”

| <i>Internet users only</i> | Internet users | Income | | | Gender | |
|-----------------------------|----------------|----------------|-------------------|------------------|--------|-------|
| | | Under \$40,000 | \$40,000-\$79,999 | \$80,000 or more | Men | Women |
| Very confident | 26% | 19% | 26% | 33% | 29% | 23% |
| Somewhat confident | 43 | 38 | 42 | 46 | 43 | 42 |
| Not too confident | 16 | 20 | 18 | 13 | 14 | 19 |
| Not at all confident | 13 | 20 | 12 | 7 | 12 | 14 |
| Don't know | 2 | 3 | 2 | 1 | 2 | 2 |

ACCESS IN LOWER-INCOME AREAS

Two-thirds of Californians (65%) think that those in lower-income areas of the state are less likely than others to have access to broadband Internet technology, while 27 percent think they are no less likely to have access. The belief that residents in lower-income areas have less access to broadband Internet technology is highest for those with household income of \$80,000 or more. Findings are similar in urban and rural communities.

Among racial/ethnic groups, whites (68%), blacks (65%), and Latinos (63%) are similarly likely to say that Californians in lower-income areas are less likely than others to have broadband access, while Asians (57%) are somewhat less likely to agree. Across regions, at least six in 10 in the San Francisco Bay Area (68%), Central Valley (66%), Los Angeles (65%), and Orange/San Diego counties (61%) say there is an inequality in broadband access for lower-income residents, while Inland Empire residents (57%) are least likely to agree. Broadband users (69%) more than non-broadband users (59%) think that Californians in lower-income areas are less likely to have broadband Internet access.

“Do you think that Californians in lower-income areas are less likely than others to have access to broadband Internet technology, or not?”

| | All Adults | Household Income | | | Community | |
|----------------------------|------------|------------------|----------------------|------------------|-----------|-------|
| | | Under \$40,000 | \$40,000 to \$79,999 | \$80,000 or more | Rural | Urban |
| Yes, less likely | 65% | 64% | 62% | 71% | 63% | 65% |
| No, not less likely | 27 | 29 | 31 | 23 | 26 | 28 |
| Don't know | 8 | 7 | 7 | 6 | 11 | 7 |

Six in 10 Californians (62%) are at least somewhat concerned that Californians in lower-income areas are less likely than others to have access to broadband Internet technology, and 23 percent say they are very concerned. Across political parties, Democrats (32%) are the most likely to say they are very concerned, followed by independents (22%) and Republicans (13%). Findings are similar across income groups. Levels of concern about unequal broadband access are also similar among rural and urban residents.

Across racial/ethnic groups, blacks (35%) are much more likely than others to say they are very concerned that Californians in lower-income areas are less likely than others to have broadband access. Among the 65 percent of residents who think Californians in lower-income areas have less access, seven in 10 say they are very (30%) or somewhat concerned (42%).

“How concerned are you that Californians in lower-income areas are less likely than others to have access to broadband Internet technology?”

| | All Adults | Party | | | Community | |
|-----------------------------|------------|-------|-----|-----|-----------|-------|
| | | Dem | Rep | Ind | Rural | Urban |
| Very concerned | 23% | 32% | 13% | 22% | 21% | 23% |
| Somewhat concerned | 39 | 41 | 34 | 43 | 36 | 39 |
| Not too concerned | 19 | 14 | 25 | 20 | 17 | 19 |
| Not at all concerned | 15 | 10 | 24 | 13 | 23 | 15 |
| Don't know | 4 | 3 | 4 | 2 | 3 | 4 |

ACCESS IN RURAL AREAS

A majority of Californians (55%) think that those in rural areas are less likely to have access to broadband Internet technology. Thirty percent think they are no less likely. Across the state, Californians in rural areas and urban residents are similar in their belief that rural residents have less broadband access (58% to 55%). This belief increases with higher education and income and declines with higher age.

Residents of the San Francisco Bay Area (58%) and the Central Valley (57%) are the most likely to think Californians in rural areas have less broadband Internet access, with Inland Empire residents (51%) the least likely. Men are somewhat more likely than women to say rural areas have less broadband access (58% to 53%). Findings among U.S.- and foreign-born residents are similar (56% to 54%).

“Do you think that Californians in rural areas are less likely than others to have access to broadband Internet technology, or not?”

| | All Adults | Household Income | | | Community | |
|----------------------------|------------|------------------|----------------------|------------------|-----------|-------|
| | | Under \$40,000 | \$40,000 to \$79,999 | \$80,000 or more | Rural | Urban |
| Yes, less likely | 55% | 52% | 55% | 64% | 58% | 55% |
| No, not less likely | 30 | 32 | 33 | 24 | 26 | 30 |
| Don't know | 15 | 16 | 12 | 12 | 16 | 15 |

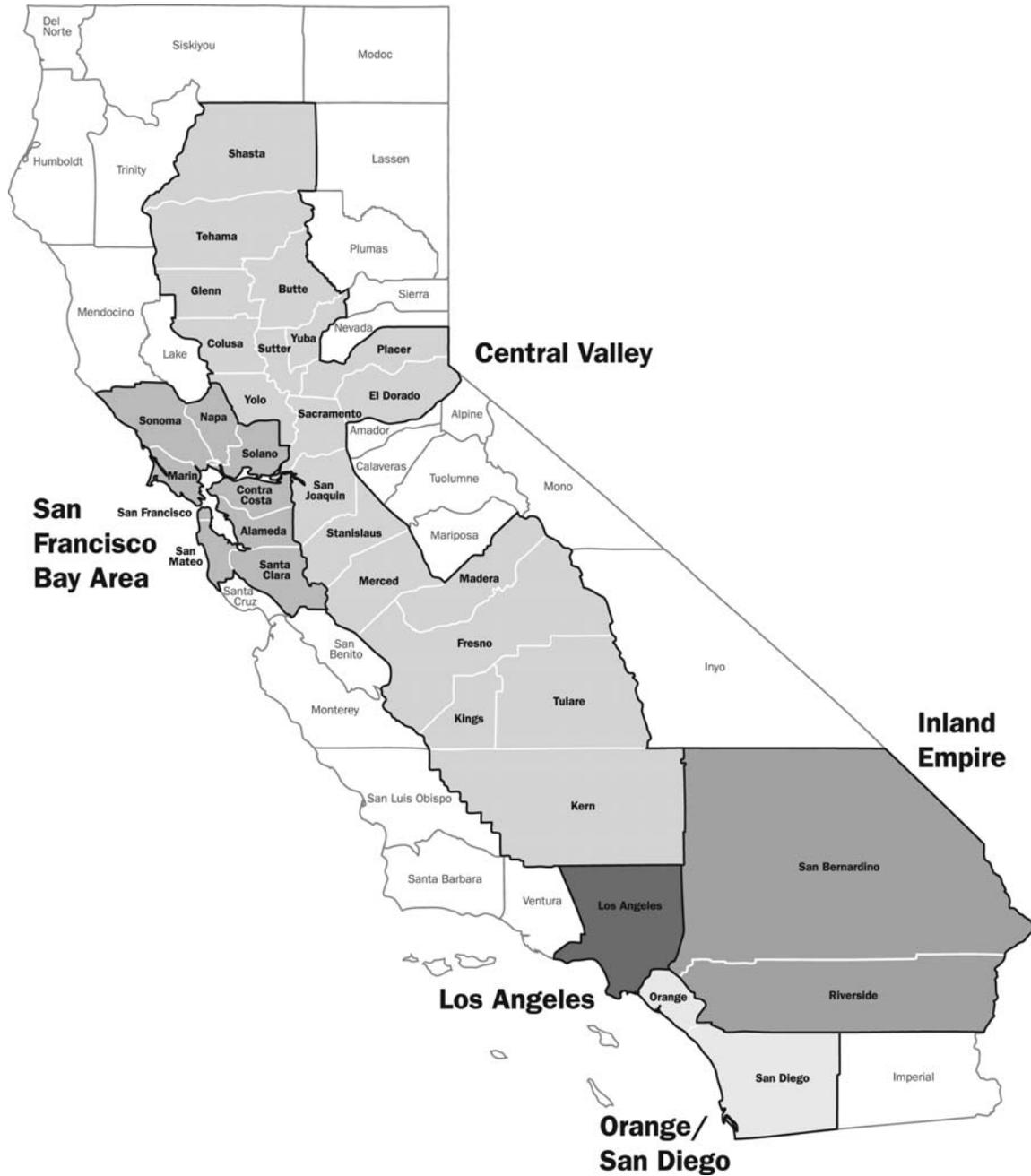
Half of Californians (51%) are at least somewhat concerned that rural residents are less likely to have broadband access; 14 percent say they are very concerned. Across parties, Democrats (19%) are the most likely to say they are very concerned, with Republicans the most likely to say they are not at all concerned (24%). Findings are similar across rural and urban communities.

Across racial/ethnic groups, blacks (20%) are the most likely to say they are very concerned, while whites (13%) and Asians (14%) are the least likely. Findings among men and women are similar. Concern decreases with increases in age. Among the 55 percent of residents who think rural Californians are less likely to have broadband access, six in 10 say they are very (20%) or somewhat concerned (43%).

“How concerned are you that Californians in rural areas are less likely than others to have access to broadband Internet technology?”

| | All Adults | Party | | | Community | |
|-----------------------------|------------|-------|-----|-----|-----------|-------|
| | | Dem | Rep | Ind | Rural | Urban |
| Very concerned | 14% | 19% | 9% | 12% | 12% | 15% |
| Somewhat concerned | 37 | 40 | 32 | 36 | 36 | 37 |
| Not too concerned | 24 | 23 | 31 | 30 | 24 | 24 |
| Not at all concerned | 19 | 15 | 24 | 18 | 22 | 19 |
| Don't know | 6 | 3 | 4 | 4 | 6 | 5 |

REGIONAL MAP



METHODOLOGY

The PPIC Statewide Survey is directed by Mark Baldassare, president and CEO and survey director at the Public Policy Institute of California, with assistance from Dean Bonner, project manager for this survey, survey research associates Jennifer Paluch and Sonja Petek, and survey intern Nicole Fox. This is the first in a series of surveys conducted with funding from the California Emerging Technology Fund (CETF) and ZeroDivide as part of a five-year project on public opinion and information technology issues. We benefited from discussions with the CETF leadership and other experts and consultation with researchers at the Pew Internet & American Life Project and PPIC; however, the survey methods, questions, and content of the report were determined solely by Mark Baldassare and the survey staff.

Findings in this report are based on a telephone survey of 2,503 California adult residents, including 2,253 interviewed on landline telephones and 250 interviewed on cell phones. Interviewing took place on weekday nights and weekend days from June 3 to June 17, 2008. Interviews took an average of 15 minutes to complete. Landline interviews were conducted using a computer-generated random sample of telephone numbers that ensured that both listed and unlisted numbers were called. All landline telephone exchanges in California were eligible for selection and the sample telephone numbers were called as many as six times to increase the likelihood of reaching eligible households. Once a household was reached, an adult respondent (age 18 or older) was randomly chosen for interviewing using the “last birthday method” to avoid biases in age and gender.

Cell phone interviews were included in this survey to account for the growing number of residents who use cell phones. These interviews were conducted using a computer-generated random sample of cell phone numbers. All cell phone numbers with California area codes were eligible for selection and the sample telephone numbers were called as many as eight times to increase the likelihood of reaching an eligible respondent. Once a cell phone user was reached, it was verified that this person was age 18 or older, a resident of California, and in a safe place to continue the survey (i.e., not driving). Cell phone respondents were offered a small reimbursement for their time to help defray the potential cost of the call. Cell phone interviews were conducted both with adults who have only cell phone service and with those who also have a landline telephone in their households.

Landline and cell phone interviewing was conducted in English, Spanish, Chinese (Mandarin or Cantonese), Vietnamese, and Korean, according to respondents’ preferences. We chose these languages because Spanish is the dominant language among non-English speaking adults in California, followed in prevalence by the three Asian languages. *Accent on Languages* translated the survey into Spanish, with assistance from Renatta DeFever. Abt SRBI Inc. translated the survey into Chinese, Vietnamese, and Korean, and conducted all interviewing.

With assistance from Abt SRBI, we used recent U.S. Census and state figures to compare the demographic characteristics of the survey sample with characteristics of California’s adult population. The survey sample was closely comparable to the census and state figures. Abt SRBI used data from the 2006 National Health Interview Survey (NHIS) for the Pacific Census Division and from the January–July 2007 NHIS to estimate landline and cell phone service in California and compare it against landline and cell phone service reported in the survey. The survey data in this report were statistically weighted to account for any differences in demographics and telephone service.

The sampling error for the total sample of 2,503 adults is +/- 2 percent at the 95 percent confidence level. This means that 95 times out of 100, the results will be within 2 percentage points of what they would be if all adults in California were interviewed. The sampling error for subgroups is larger: For the 1,835 registered voters, it is +/- 2.5 percent; for the 1,295 likely voters, it is +/- 3 percent. Sampling

error is only one type of error to which surveys are subject. Results may also be affected by factors such as question wording, question order, and survey timing.

Throughout the report, we refer to five geographic regions accounting for approximately 90 percent of the state population. “Central Valley” includes Butte, Colusa, El Dorado, Fresno, Glenn, Kern, Kings, Madera, Merced, Placer, Sacramento, San Joaquin, Shasta, Stanislaus, Sutter, Tehama, Tulare, Yolo, and Yuba counties. “San Francisco Bay Area” includes Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma counties. “Los Angeles” refers to Los Angeles County, “Inland Empire” includes Riverside and San Bernardino counties, and “Orange/San Diego” refers to Orange and San Diego counties. Residents from other geographic areas are included in the results reported for all adults, registered voters, and likely voters. However, sample sizes for these less populated areas are not large enough to report separately in tables and text. In this survey, we also asked for the zip code of the residence in order to compare the responses of those living in rural areas to those living in urban areas as defined by the U.S. Census. The U.S. Census defines urban areas as generally consisting of a large central place and adjacent densely settled census blocks that together have a total population of at least 2,500 for urban clusters, or at least 50,000 for urbanized areas. Rural areas are defined as any territory not classified as urban.

We present specific results for respondents in four self-identified racial/ethnic groups: Asian, black, Latino, and non-Hispanic white. We also compare the opinions of registered Democrats, Republicans, and independents (i.e., those registered as “decline to state”). We also analyze the responses of likely voters—those who are the most likely to participate in the state’s elections. In addition, we present the responses of Internet users—defined in a manner to be consistent with national surveys for comparison purposes as those who answered yes to either: “Do you ever go online to access the Internet or worldwide web or send or receive email?” or “Do you send or receive email, at least occasionally?”

We compare current PPIC Statewide Survey results to those in our earlier surveys and to those in recent surveys by the Pew Internet & American Life Project.

QUESTIONNAIRE AND RESULTS

CALIFORNIANS AND INFORMATION TECHNOLOGY

June 3–17, 2008

**2,503 California Adult Residents:
English, Spanish, Chinese, Korean, and Vietnamese**

MARGIN OF ERROR +/-2% AT 95% CONFIDENCE LEVEL FOR TOTAL SAMPLE

1. First, do you think things in California are generally going in the right direction or the wrong direction?
22% right direction
69 wrong direction
9 don't know
2. Turning to economic conditions in California, do you think that during the next 12 months we will have good times financially or bad times?
15% good times
78 bad times
7 don't know
- 3a. Changing topics, do you have any type of personal computer, including laptops, in your home?
72% yes [skip to q3e]
28 no [ask q3d]
[q3b and q3c not asked]
- 3d. And what is the main reason you don't have a computer at home?
[code, don't read]
37% cost
22 not interested
21 don't know how to use it
7 don't really know about computers
3 sufficient access elsewhere
3 concern about children's access
6 other
1 don't know
- 3e. Do you yourself ever use a computer at home, at work, or at school? (if yes: Do you use a computer often or only sometimes?)
58% yes, often [ask q4]
16 yes, sometimes [ask q4]
25 no [skip to q34]
1 don't know [skip to q34]
- 4/4a. Do you ever go online to access the Internet or worldwide web or send or receive email? or Do you send or receive email, at least occasionally?
70% yes
30 no/don't use a computer
[q5-q9 asked only of Internet users]
5. Did you happen to use the Internet yesterday?
78% yes
22 no
6. About how many years have you been an Internet user?
1% less than 1 year
26 1–5 years
42 6–10 years
21 11–15 years
8 more than 15 years
2 don't know

7. About how often do you use the Internet or email from home?

- 41% several times a day
- 25 about once a day
- 13 3–5 days a week
- 9 1–2 days a week
- 3 every few weeks
- 3 less often
- 6 never *(volunteered)*

8. About how often do you use the Internet or email from work?

- 43% several times a day
- 9 about once a day
- 5 3–5 days a week
- 4 1–2 days a week
- 1 every few weeks
- 5 less often
- 24 never *(volunteered)*
- 9 don't work/retired *(volunteered)*

9. About how often do you use the Internet or email from someplace other than home or work?

- 8% several times a day *[ask q10]*
- 6 about once a day *[ask q10]*
- 6 3–5 days a week *[ask q10]*
- 8 1–2 days a week *[ask q10]*
- 7 every few weeks *[ask q10]*
- 24 less often *[skip to q14]*
- 41 never *(volunteered) [skip to q14]*

Now please think about the ways you accessed the Internet from someplace other than from home or from work.

[q10-q12 asked only of those who accessed the Internet from somewhere other than home or work at least every few weeks]

10. Did you access the Internet using a laptop through a wireless connection?

- 60% yes
- 40 no

11. Did you access the Internet using a cell phone or handheld device such as a Blackberry?

- 42% yes
- 58 no

12. Did you access the Internet using a computer at a public library?

- 37% yes
- 63 no

[If "yes" to q10, ask q13 and q13a]

13. In the past year, have you ever used WiFi or other wireless Internet services in public places, such as airports, coffee shops or restaurants?

- 72% yes *[ask q13a]*
- 28 no *[skip to q14]*

13a. Do you mostly use free WiFi services in public areas, do you mostly use WiFi you have to pay for, or do you use a mixture of free and paid services?

- 55% mostly free
- 9 mostly pay
- 34 a mix
- 1 use other services/do not use WiFi *(volunteered)*
- 1 don't know

Next, please tell me if you ever use the Internet to do any of the following things?

[rotate q14-q23c]

[findings for q14-q24 reported for all adults]

14. How about going online to get news or information about politics or the 2008 campaigns?

- 46% yes
- 54 no/don't use computers or Internet

15. How about going online for information for your work or job?

- 49% yes
- 51 no/don't use computers or Internet

16. How about going online to purchase goods and services?
52% yes
48 no/don't use computers or Internet
17. How about going online to get news and information on current events, public issues, or politics?
55% yes
45 no/don't use computers or Internet
18. How about going online to use a social networking site like MySpace, Facebook or LinkedIn.com?
26% yes
74 no/don't use computers or Internet
19. How about going online to do any banking or manage your finances?
47% yes
53 no/don't use computers or Internet
20. How about going online to get health or medical information?
50% yes, do this
50 no/don't use computers or Internet
21. How about going online for your education, such as taking a college course?
27% yes, do this
73 no/don't use computers or Internet
22. How about going online to visit a state, local, or federal government website?
50% yes, do this
50 no/don't use computers or Internet
- 23a. How about going online to access government resources, such as obtaining forms, making payments, or registering to vote?
43% yes, do this
57 no/don't use computers or Internet
- 23b. How about going online to get housing or real estate information?
40% yes, do this
60 no/don't use computers or Internet
- 23c. How about going online to get information about activities or events in your community?
47% yes, do this
53 no/don't use computers or Internet
24. What kind of Internet connection do you have at home? Do you use a dial-up telephone line, or do you have some other type of connection, such as a DSL-enabled phone line, a cable TV modem, a wireless connection, a fiber optic connection such as FiOS or a T-1?
29% DSL-enabled phone line [ask q25]
19 cable modem [ask q25]
7 dial-up telephone line [skip to q27]
5 wireless connection (either land-based or satellite) [ask q25]
2 fiber optic or T-1 [ask q25]
1 other (specify) [skip to q27]
36 do not have Internet access/computer at home [skip to q27]
1 don't know [skip to q27]
- [q25 and q26 asked only of broadband users]**
25. What do you like most about having a high-speed Internet connection at home?
[code, don't read]
71% faster access/greater speed
11 convenience in general
3 easier to check email/communicate
2 doing job-related tasks from home/working from home
2 downloading all types of files faster
2 the "always on" connection
7 other
2 don't know
26. Thinking about your high-speed Internet service at home, do you subscribe to a basic broadband service, or do you pay extra for a premium service that promises faster speed?
58% subscribe to basic service
31 subscribe to premium service at higher price
11 don't know

[q27 asked only of those who don't have DSL, cable, fiber optic, or T1 Internet connection]

27. Do you happen to know whether high-speed Internet service is available in your neighborhood from a telephone company, a cable company or any other company?

- 74% yes, available
- 17 no, not available
- 9 don't know

[q28 and q29 asked only of dial-up users]

28. Would you like to have a faster broadband connection, or isn't that something you're interested in?

- 30% yes, interested
- 69 no, not interested
- 1 don't know

29. What would it take to get you to switch to broadband?

[code, don't read]

- 35% lower price
- 6 it would have to become available where I live
- 3 having someone else pay for it
- 2 my cable/telephone company would have to offer it where I live
- 24 nothing will convince me to get broadband/not interested
- 11 other
- 19 don't know

[q30-q33 asked only of Internet users]

30. Overall, how comfortable are you using the tools of modern information technology?

- 62% very comfortable
- 31 somewhat comfortable
- 5 not too comfortable
- 1 not at all comfortable
- 1 don't know

31. Overall, how comfortable are you using the Internet to get the information needed in your everyday life?

- 70% very comfortable
- 25 somewhat comfortable
- 3 not too comfortable
- 1 not at all comfortable
- 1 don't know

[rotate q32 and q33]

32. Overall, how confident are you that you can keep things like computer viruses, spyware and adware off of your home computer when you want to?

- 32% very confident
- 41 somewhat confident
- 17 not too confident
- 8 not at all confident
- 2 don't know

33. How confident are you that financial transactions on the Internet are secure and private?

- 26% very confident
- 43 somewhat confident
- 16 not too confident
- 13 not at all confident
- 2 don't know

[rotate q34 and q35]

[q34-q42 asked of all adults]

34. How important do you think it is for Californians to have access to the Internet?

- 69% very important
- 21 somewhat important
- 4 not too important
- 3 not at all important
- 3 don't know

35. How important is the Internet as a source of information in your every day life?

- 51% very important
- 29 somewhat important
- 9 not too important
- 9 not at all important
- 2 don't know

[rotate q36 and q37]

36. Overall, thinking about the way the Internet is regulated by the government, do you think the government is doing more than enough, just enough, or not enough?

- 12% more than enough
- 42 just enough
- 32 not enough
- 14 don't know

37. Overall, thinking about the government's role in improving the access and availability of broadband Internet technology, do you think the government is doing more than enough, just enough, or not enough?

10% more than enough
41 just enough
30 not enough
19 don't know

[rotate blocks: q38-q39 and q40-q41]

38. Do you think that Californians in lower-income areas are less likely than others to have access to broadband Internet technology, or not?

65% yes, less likely to have access
27 no, not less likely to have access
8 don't know

39. How concerned are you that Californians in lower-income areas are less likely than others to have access to broadband Internet technology?

23% very concerned
39 somewhat concerned
19 not too concerned
15 not at all concerned
4 don't know

40. Do you think that Californians in rural areas are less likely than others to have access to broadband Internet technology, or not?

55% yes, less likely to have access
30 no, not less likely to have access
15 don't know

41. How concerned are you that Californians in rural areas are less likely than others to have access to broadband Internet technology?

14% very concerned
37 somewhat concerned
24 not too concerned
19 not at all concerned
6 don't know

42. On another topic, some local governments have considered providing wireless broadband Internet access to all residents at no cost. Is it a good idea or a bad idea for local governments to provide Internet access to its residents?

67% good idea
26 bad idea
7 don't know

[q43 asked of those who completed survey on a landline telephone]

43. Now thinking about your telephone use, do you have a working cell phone?

75% yes, have cell phone
25 no, do not

[q44-q45a asked of all respondents who have a cell phone]

44. Do you ever use your cell phone to send or receive text messages?

58% yes
42 no

45. Do you ever use your cell phone to send or receive email messages?

26% yes
74 no

45a. Do you ever use your cell phone to access the Internet?

25% yes
75 no

46. On another topic, some people are registered to vote and others are not. Are you absolutely certain that you are registered to vote in California?

73% yes [ask q46a]
26 no [skip to q47]
1 don't know [skip to q47]

46a. Are you registered as a Democrat, a Republican, another party, or as an independent?

43% Democrat [skip to q48]
34 Republican [skip to q48]
3 another party (specify) [skip to q48]
20 independent [ask q47]

47. Do you think of yourself as closer to the Republican Party or Democratic Party?

- 21% Republican Party
- 46 Democratic Party
- 24 neither (*volunteered*)
- 9 don't know

48. Generally speaking, how much interest would you say you have in politics?

- 31% great deal
- 36 fair amount
- 24 only a little
- 8 none
- 1 don't know

49. Would you consider yourself to be politically:

[read list, rotate order top to bottom]

- 11% very liberal
- 19 somewhat liberal
- 31 middle-of-the-road
- 24 somewhat conservative
- 12 very conservative
- 3 don't know

[d1-d4: demographic questions]

[d5-d5h asked of parents with children 18 or under]

d5. Are any of your children in elementary school?

- 60% yes [*ask d5a*]
- 40 no [*skip to d5c*]

d5a. Do you ever visit the website of this child's school? (*if yes: Do you do this often or only sometimes?*)

- 19% yes, often
- 32 yes, sometimes
- 49 no

d5b. Do you ever receive this child's homework assignments via the Internet or email? (*if yes: Do you do receive these often or only sometimes?*)

- 8% yes, often
- 10 yes, sometimes
- 82 no

d5c. Are any of your children in middle school?

- 30% yes [*ask d5d*]
- 70 no [*skip to d5f*]

d5d. Do you ever visit the website of this child's school? (*if yes: Do you do this often or only sometimes?*)

- 23% yes, often
- 26 yes, sometimes
- 51 no

d5e. Do you ever receive this child's homework assignments via the Internet or email? (*if yes: Do you do receive these often or only sometimes?*)

- 13% yes, often
- 15 yes, sometimes
- 71 no
- 1 don't know

d5f. Are any of your children in high school?

- 37% yes [*ask d5g*]
- 63 no [*skip to d6*]

d5g. Do you ever visit the website of this child's school? (*if yes: Do you do this often or only sometimes?*)

- 28% yes, often
- 25 yes, sometimes
- 47 no

d5h. Do you ever receive this child's homework assignments via the Internet or email? (*if yes: Do you do receive these often or only sometimes?*)

- 15% yes, often
- 20 yes, sometimes
- 65 no

[d6-d20: demographic questions]

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