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July 15, 2014

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CALIFORNIA EMERGING TECHNOLOGY FUND  
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The Honorable Jim DeMartini, Chairman, District 5 County Supervisor  
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The Honorable Vito Chiesa, District 2 County Supervisor  
The Honorable Dick Monteith, District 4 County Supervisor  
Stanislaus County Board of Supervisors  
1010 10th Street, Suite 6500  
Modesto, California 95354

Dear Stanislaus County Board of Supervisors:

Enclosed please find a copy of the California Emerging Technology Fund (CETF) 2013-2014 Annual Report which highlights the importance of leadership in closing the Digital Divide and salutes Broadband Champions, representative of trailblazers throughout the state. California has re-emerged as a national leader on Digital Inclusion because elected officials such as you have stepped forward at pivotal moments to make a difference.

This CETF Annual Report shows that it is possible to tackle a major challenge, set a quantified goal, and make substantial gains in a relatively short period of time with focus and hard work from elected officials, policymakers, stakeholders, civic leaders, and community organizations. We invite your continued interest and partnership in pursuing the quest to close the Digital Divide. Nothing less than equity and opportunity for all residents and California's global competitiveness hang in the balance.

We are also including the findings of our 7<sup>th</sup> Annual Survey examining the Digital Divide in California. Fully one-quarter of California households do not have high-speed Internet at home. As I wrote in our press release accompanying the results, these findings are a sobering reminder that while we live in a state renowned for technology and innovation, the Digital Divide is real and impacting millions of Californians. This is not acceptable.

This should serve as a wake-up call to the Federal Communications Commission and elected leaders that the nation needs an affordable broadband rate and sustainable programs to address the literacy needs of low-income residents if we want our country to be competitive.

We commend your commitment, leadership, and diligent efforts to help close the Digital Divide in California and we look forward to continuing to working with you to achieve success.

Sincerely,

Sunne Wright McPeak  
President and CEO

ATTACHMENTS AVAILABLE  
FROM CLERK



**Embargoed for media use: Tuesday, July 8, 2014**  
**Contact: Mary Anne Ostrom, [Maryanne.Ostrom@cetfund.org](mailto:Maryanne.Ostrom@cetfund.org)**  
**Mobile: 510-381-3070**

## **California Emerging Technology Fund Calls for National Policy on Affordable Broadband Rate**

### ***New Poll Shows Large Disparities in Home Broadband Use in California***

**San Francisco and Los Angeles, CA – July 8, 2014** – The California Emerging Technology Fund (CETF) in partnership with The Field Poll today released results of a new survey examining the depth of the Digital Divide in California. CETF, a non-profit foundation, was set up by the California Public Utilities Commission in 2005 to break down barriers to broadband deployment and adoption based on statewide goals.

The poll found that home broadband adoption rates have stagnated over the past few years, leaving the hardest-to-reach Californians without an essential tool to access the educational, employment and civic engagement opportunities that lead to self-sufficiency. The statewide goal is to achieve 80% home adoption by 2017, with no single demographic group or region below 70%.

According to The Field Poll, demographic groups with home broadband adoption rates that fall more than 10 percentage points below the 2014 state home broadband adoption\* average of 75% include:

<b>Not a high school graduate (32%)</b>	<b>Spanish-speaking Latinos (46%) All Latinos (63%)</b>
<b>65 or older (47%)</b>	<b>Household income of less than \$20,000 (53%)</b>
<b>People with disabilities (59%)</b>	<b>Non-citizens (60%)</b>

“These findings are a sobering reminder that while we live in a state renowned for technology and innovation, the Digital Divide is real and impacting millions of Californians. Fully one-quarter of California households do not have high-speed Internet at home. This is not acceptable,” said Sunne Wright McPeak, President and CEO of the California Emerging Technology Fund.

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\*This percentage includes adults accessing the Internet at home with a smartphone or through DSL, cable, satellite or fiber optic connections to a home desktop, laptop or tablet computer.

2-2-2-2

“On the brighter side, 6 in 10 of those who do not use the Internet at home suggested they might be interested if they had access to affordable broadband and equipment and the skills to use it. This should serve as a wake-up call to the Federal Communications Commission and elected leaders that the nation needs an affordable broadband rate and sustainable programs to address the literacy needs of low-income residents if we want our country to be competitive,” McPeak said.

### **Poverty and Broadband Adoption**

While progress has been made since initial polling data showed California at 55% home broadband adoption in 2008, the stakes are even higher now. It is nearly impossible to find employment without at having at least basic digital skills, and economic self-sufficiency is the only pathway out of poverty.

“We must recognize that the Digital Divide is both a manifestation of, and driver of, the economic divide. These survey findings indicate that a large swath of Californians, notably Spanish-speakers, low-income residents and those without at least a high school education, exhibit significant disparities in their access and use of the Internet. And because digital connectivity is crucial to gaining economic empowerment in the digital age, this is a recipe for leaving a significant share of Californians behind. In today's world and tomorrow's future, economic and social opportunity are dependent on access to affordable high-speed Internet at home,” said Dr. Manuel Pastor, Professor of Geography and American Studies & Ethnicity at the University of Southern California.

### **Older Californians and Broadband Adoption**

Older Californians are among the least-connected, according to the survey, which raises critical quality-of-life issues for this group.

“Far too many older adults are being left behind. Often, these are our parents and grandparents. This has huge implications for their health and welfare, personal fulfillment and social connectedness,” said CETF Board Secretary Barbara O’Connor. “Businesses, governments and non-profits must work to reduce broadband adoption barriers by implementing affordable high-speed Internet access at home for older adults, integrating technology into the delivery of government services, and providing digital literacy training, particularly in the area of health and financial empowerment.”

### **Usage Patterns by Smartphones and Computing Devices**

With the explosion of smartphones, the survey examined how people use the Internet from home for different activities depending on whether they mostly or only used a computer or whether they only used a smartphone. Higher percentages of poor households, Latinos, African-Americans and non-citizens said they only use the smartphone to connect at home.

3-3-3-3

While both types of users cited entertainment and social media as their top activities, “smartphone only users” were much less likely to visit government or community web sites, bank online or transfer funds to family members, get health or medical information or communicate with their doctor or take a class online.

### **Education and Broadband Adoption**

“While mobile phones are essential devices, they are not enough to help poor Californians access many of the services they need to break out of poverty or close the education Achievement Gap,” McPeak said. For example, California public school students are now required to take assessment tests on a computing device and those without daily experience at home using a desktop, laptop or tablet will be at a disadvantage.

The poll found that parents who have a broadband connection other than a smartphone at home were highly likely to go online at home to help their children learn (84%) and to obtain information about their children’s homework and grades from the school website (75%).

“As technology is integrated in the classroom, poor students who only have smartphone access to the online world when they go home will fall farther behind and we all will be worse off for it. This is a call to action for government, industry and philanthropic groups to work to finally close the Digital Divide in California,” McPeak said.

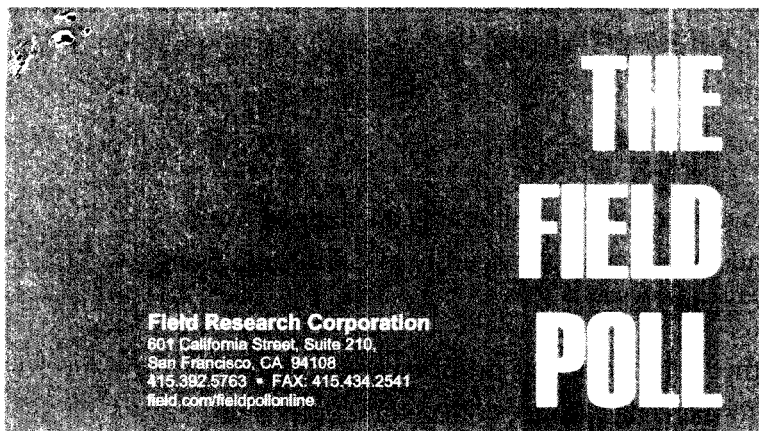
**For full poll results, please go to <http://www.field.com/fieldpollonline/subscribers/Rls2476.pdf>**

### **How to Subscribe to Affordable Broadband at Home**

CETF partners with the Stride Contact Center, an independent, non-profit entity that provides free telephone consultations on how to find discount broadband service where you live. For more information, call 1-888-491-5982.

### **About the California Emerging Technology Fund**

*The mission of CETF is to close the Digital Divide in California by breaking down barriers to high-speed Internet access at home. The goal is to reach 98% of all residences with broadband infrastructure and to achieve 80% home adoption by 2017. This statewide goal can only be accomplished if the following specific hard-to-reach target communities achieve at least a 70% adoption rate: low-income populations, Latino households, rural communities, and people with disabilities. For more information, please visit [www.cetfund.org](http://www.cetfund.org).*



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**DIGITAL DIVIDE PERSISTS IN CALIFORNIA**  
**Wide Differences in Internet Use and Broadband Connectivity Across Demographic Subgroups of the State's Adult Population**

According to a *Field Poll* conducted on behalf of the California Emerging Technology Fund (CETF), 86% of adult Californians use the Internet at least occasionally. This proportion is unchanged from a similar CETF survey completed last year.

However, Internet use varies significantly across different segments of the state's population. While greater than 95% of Californians age 18 -29, college graduates and those with annual household incomes of \$60,000 or more report being an Internet user, significantly smaller proportions of other California adults do so. Shown below are the subgroups reporting the lowest levels of Internet use:

- Adults who have not graduated from high school (51%)
- Spanish-speaking Latinos (60%)
- Seniors age 65 or older (67%)
- Non-citizens (70%)
- Residents with annual household incomes of less than \$20,000 (71%)
- Disabled adults (73%)
- Naturalized citizens (76%)

When Californians who do not use the Internet at home are asked their reasons for not doing so, 36% say they are not interested or feel they do not need it. However, 60% offer reasons other than a lack of interest or need. This includes 21% who say they don't know how to use it, 12% reporting that computers are too expensive, 10% saying that Internet connectivity is too expensive, 3% volunteering that service is not available in the area where they live and 22% offering a wide assortment of other reasons.

The survey also finds that three in four California adults (75%) live in households with broadband Internet connectivity. The largest component are adults accessing broadband Internet through DSL, cable, satellite or fiber optic connections to a home desktop, laptop or tablet computer (67%). However, a small but significant segment of other adults (8%) are now connecting to broadband Internet at home solely through a smart phone.

*The Field Poll/CETF*  
*Tuesday, July 8, 2014*

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The overall proportion of adults with broadband Internet connectivity at home is unchanged from 2013. Prior to this, broadband connectivity at home had been increasing steadily in California, from 55% in 2008 to 62% in 2009, to 70% in 2010 and to 73% in 2012.

There are wide variations in access to broadband Internet at home across different segments of the state's population. While greater than nine in ten Californians age 18-29, college graduates and those with annual household incomes of \$100,000 or more have broadband Internet access at home, significantly smaller proportions of the following populations report this:

- Adults who have not graduated from high school (32%)
- Spanish-speaking Latinos (46%)
- Seniors age 65 or older (47%)
- Residents with annual household incomes of less than \$20,000 (53%)
- Disabled adults (59%)
- Non-citizens (60%)
- Naturalized citizens (63%)

The 8% of California adults using a smart phone as their sole means of connecting to the Internet at home include many of the same subgroups reporting lower than average access to broadband Internet connectivity at home. These include Spanish-speaking Latinos, non-citizens, adults who have not graduated from high school, and residents whose annual household income is less than \$40,000.

This is significant because there are big differences between how Californians with access to broadband through a home computer are using the Internet versus those solely accessing it at home through a smart phone. The following are Internet uses where the differences are particularly large.

- Visiting government or community web sites (74% vs. 57%)
- Banking online or transferring funds to family members (69% vs. 41%)
- Getting health or medical information or communicating with their doctor (61% vs. 41%)
- Taking a class or a training course online (40% vs. 27%)

In addition, the survey finds that large majorities of parents with access to broadband Internet through a home computer use their computer to help their child learn (84%) and obtain information about homework and grades from their child's school website (75%).

– 30 –

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Mark DiCamillo, The Field Poll, 415-392-5763, [markd@field.com](mailto:markd@field.com)

*The Field Poll/CETF*  
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## **Information About The Survey**

### **Methodological Details**

The findings in this report are based on a *Field Poll* completed June 5-22, 2014 on behalf of the California Emerging Technology Fund, a non-profit foundation set up by the California Public Utilities Commission. The survey was conducted among a random sample of 2,013 California adults. 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 dual frame random digit dial landline and cell phone listings covering the state of California. For this survey, a total of 1,402 interviews were conducted with respondents on their cell phone and 611 were conducted on a landline or other type of phone. The combined landline and cell phone sample was weighted to match demographic, geographic and voter registration estimates of the adult population in California. The weighting process also takes into account the higher probability of reaching respondents who 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 adult sample is +/- 2.2 percentage points at the 95% confidence level.

The maximum sampling error estimates are based on survey findings in the middle of the sampling distribution (i.e., results at or near 50%). Percentages at either tail of the distributions (i.e., results closer to 10% or 90%) have somewhat smaller margins of error. There are other 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, who is still an active advisor. 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 California foundations and independent 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**

Do you use the Internet, at least occasionally?

Do you send or receive email, at least occasionally?

Do you or do others in your household use a device that is not a cell phone to access the Internet from home, like a desktop, laptop or tablet computer?

(IF INTERNET USED WITH DEVICE OTHER THAN CELL PHONE): What kind of Internet connection do you have at home? Is it a dial-up telephone line or a high speed Internet connection, such as D-S-L, cable, satellite or fiber optic connections?

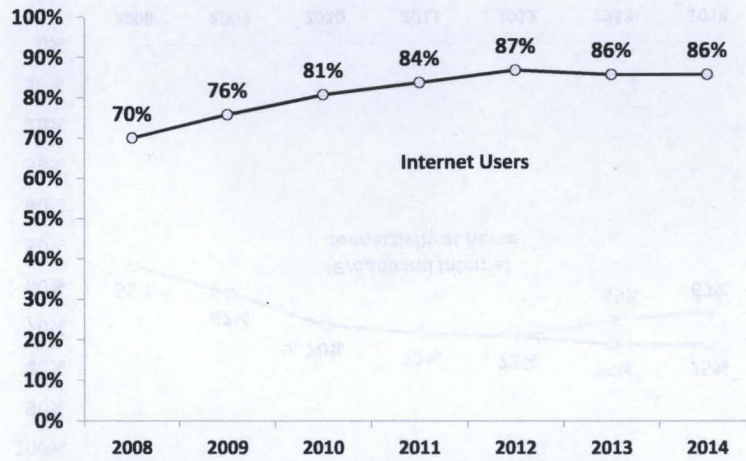
(IF INTERNET USER): When you use the Internet at home, do you do that only using a cell phone, mostly using a cell phone, mostly using some other device like a desktop, laptop or tablet computer, only using a desktop, laptop, or tablet computer or other device, or don't you use the Internet at home?

(IF INTERNET USER AT HOME): Do you use the Internet at home, at least occasionally, to (ITEM)?

- a. to visit a government or community web site to obtain information or use public services
- b. to search for jobs
- c. to apply for a job
- d. to take a class or training course online
- e. to get health or medical information or communicate with your doctor
- f. to visit social networking sites, such as Facebook, LinkedIn, Twitter or Instagram
- g. (IF PARENT:) to help your child learn
- h. (IF PARENT:) to obtain information from the web site of your child's school about homework and grades
- i. to bank online or transfer funds to family members
- j. for entertainment, such as listening to music, watching or downloading TV shows or movies, or playing games

(IF DOES NOT USE INTERNET AT HOME): What is the main reason you don't use the Internet at home?

**Table 1**  
**Trend of Internet use among California adults**  
(2008 - 2014)



*Note: Internet users during each year include those who report using the Internet or email at least occasionally. Surveys prior to 2014 conducted for the California Emerging Technology Fund by the Public Policy Institute of California.*

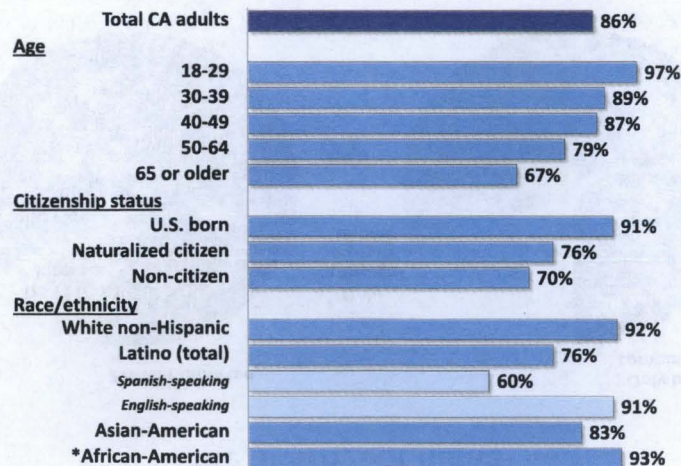
## Updating the "Digital Divide" In California

- A statewide survey conducted for -  
**California Emerging Technology Fund**

- by -  
**The Field Poll**

June 2014

**Table 2a**  
**Internet use in California varies by age, citizenship status and race/ethnicity**



*\* Findings from this subgroup have a smaller sample base and are subject to larger margins of sampling error.*

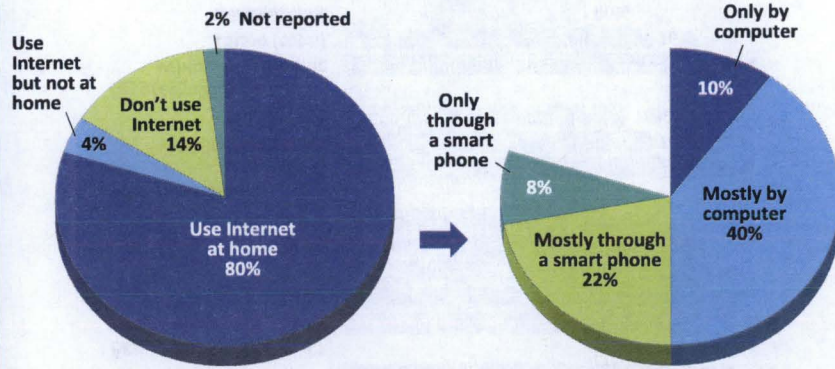
## About the Survey

- 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 sample of adults developed from random digit dial landline and cell phone listings
- Sample size:** 2,013
- Languages of administration:** English, Spanish, Cantonese, Mandarin, Korean and Vietnamese
- Interviewing period:** June 5-22, 2014



Table 3

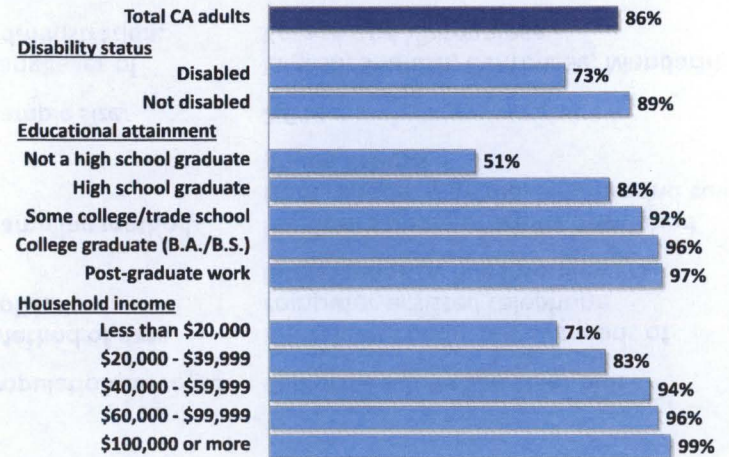
How California adults access the Internet at home



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

Table 2b

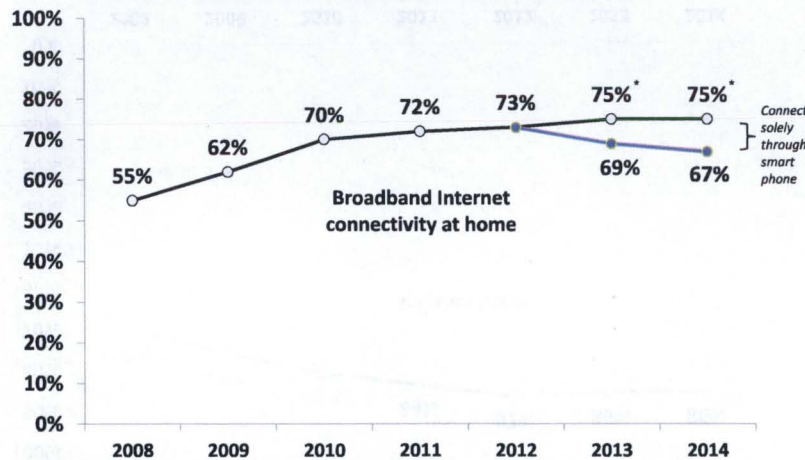
Internet use also varies by disability status, educational attainment and household income



Note: Disabled adults include those who report having an impairment or illness that prevents them from fully participating at work, school, or in performing domestic chores or other activities, or who have trouble seeing, hearing, speaking or walking.

Table 4

Trend of California adults with broadband Internet connectivity at home (2008 - 2014)

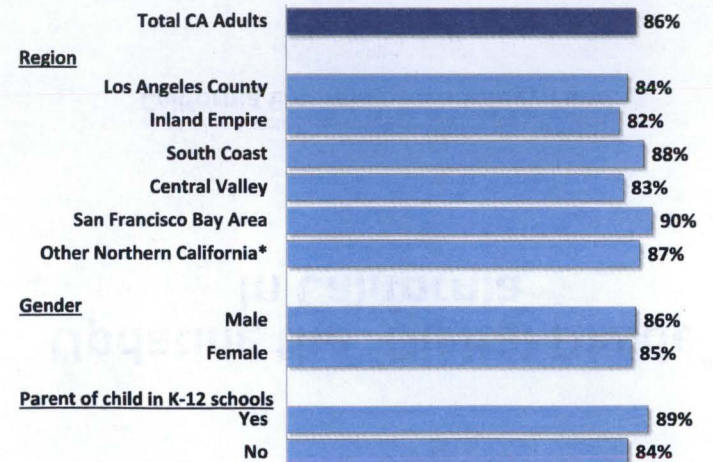


\* For all years prior to 2013, broadband Internet connectivity included those accessing the Internet through DSL, cable, satellite or fiber optic connections to a home desktop, laptop or tablet computer. For years 2013 and 2014, this also includes those connecting to the Internet at home solely through a smart phone.

Surveys prior to 2014 conducted for the California Emerging Technology Fund by the Public Policy Institute of California.

Table 2c

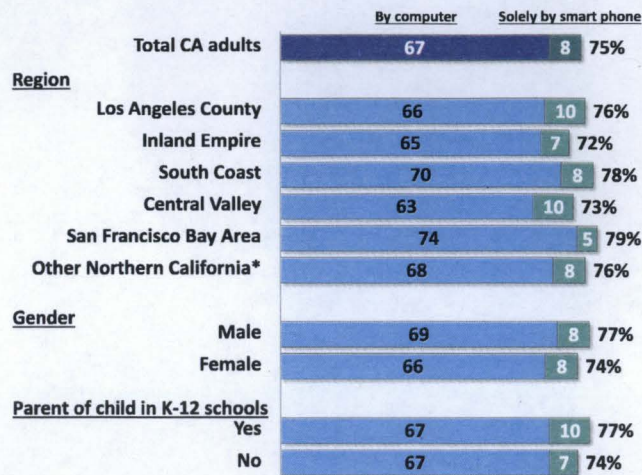
There is not much variation in Internet use across regions of the state, by gender or among parents



\* Findings from this subgroup have a smaller sample base and are subject to larger margins of sampling error.

Table 5c

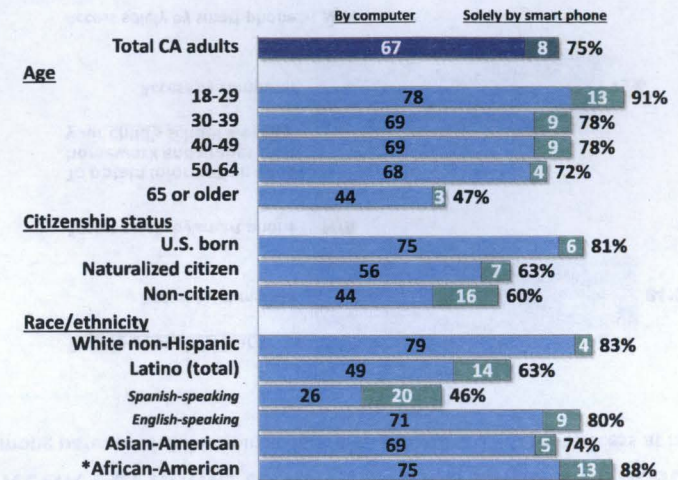
### Not much difference in broadband Internet connectivity at home by gender, among parents or by region of the state



\* Findings from this subgroup have a smaller sample base and are subject to larger margins of sampling error.

Table 5a

### Broadband Internet connectivity at home is related to age, race/ethnicity, English proficiency, and citizenship status

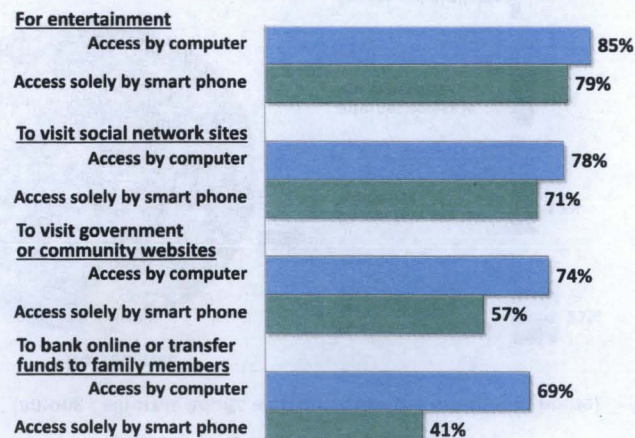


\* Findings from this subgroup have a smaller sample base and are subject to larger margins of sampling error.

Table 6a

### Selected ways that California adults use the Internet at home<sup>(1 of 2)</sup>

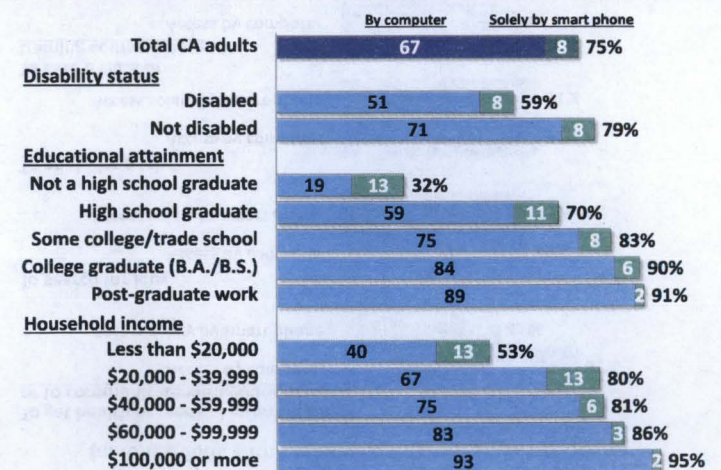
(among adults with broadband Internet access at home)



Note: Entertainment includes listening to music, watching or downloading TV shows or movies, or playing games.

Table 5b

### Broadband Internet connectivity at home is also related to disability status, educational attainment and household income

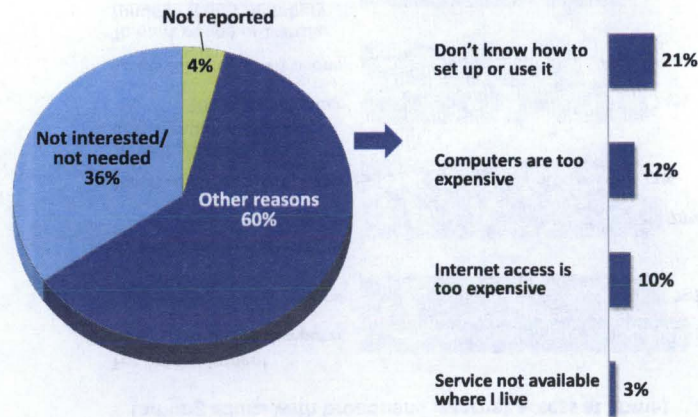


Disabled adults include those who report having an impairment or illness that prevents them from fully participating at work, school, or in performing domestic chores or other activities, or who have trouble seeing, hearing, speaking or walking.

Table 8

### Reasons that non-users give for not using the Internet at home

(among California adults who don't use the Internet at home)



Note: A wide range of reasons other than those listed above are cited by another 22%.  
The sum of all reasons offered adds to more than 100% due to multiple mentions.

Table 6b

### Selected ways that California adults use the Internet at home (2 of 2)

(among adults with broadband Internet access at home)

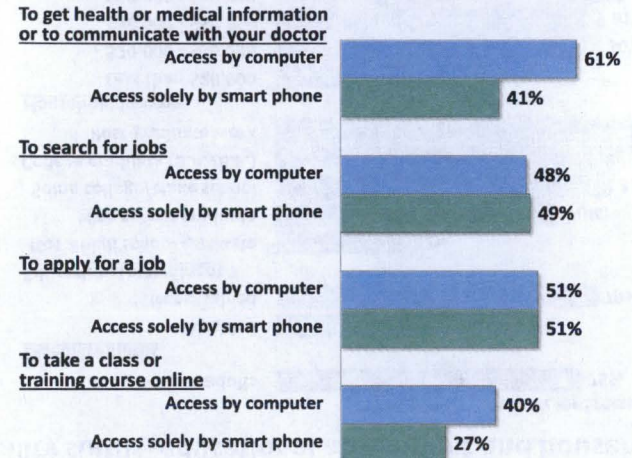
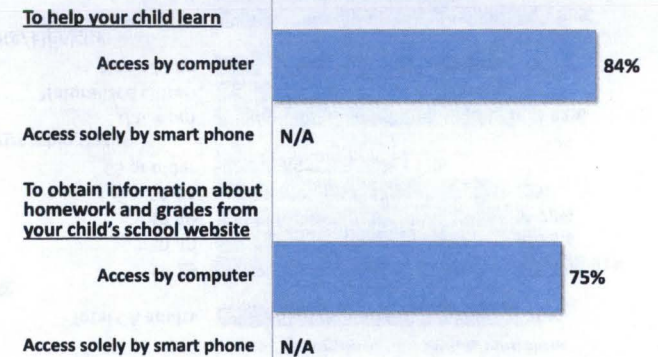


Table 7

### Selected ways that California parents use the Internet at home to further their child's education

(among parents of children in school with broadband Internet access at home)



N/A: Sample sizes too small to report reliable results for this subgroup.

# San Jose Mercury News

## Poll: California's digital divide still gaping

By Patrick May  
[pmay@mercurynews.com](mailto:pmay@mercurynews.com)

Posted: 07/08/2014 08:58:02 AM PDT



Patrons use computers at the Hayward Library Tech Lab on Monday, July 7, 2014 in Hayward,

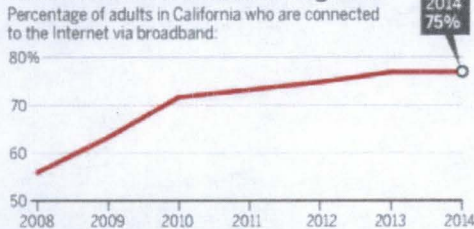
Araceli Barron, the bilingual mother of three young children in Sunnyvale, has seen California's digital divide up close. Until recently, the family had no Internet access at home and as more and more schoolwork required an online presence, her sixth-grade daughter was starting to fall behind.

"In January we finally got Internet and it's made a huge difference in all my kids' grades," said Barron, whose household income is not much more than \$20,000 a year. "And that's really helped my kids' self-esteem."

### Who has broadband Internet access



### Access to broadband Internet stagnates



Source: Field Poll survey of 1,402 California adults, conducted June 5-22.  
Margin of error: +/- 2.2 percentage points  
BAY AREA NEWS GROUP

Despite living in the tech-rich heart of Silicon Valley, Barron and her children have straddled a stubborn gap between the state's digital-haves and have-nots that shows little sign of closing anytime soon. According to a statewide Field Poll released Tuesday, broadband adoption rates have stagnated over the past few years, with access by Latinos, seniors and others lagging behind that enjoyed by younger adults and those with higher incomes.

According to the poll, 75 percent of adult Californians have broadband Internet connectivity at home. While that's up from 55 percent when the first poll was done in 2008, this year's number was unchanged from 2013 as growth appears to have stalled.

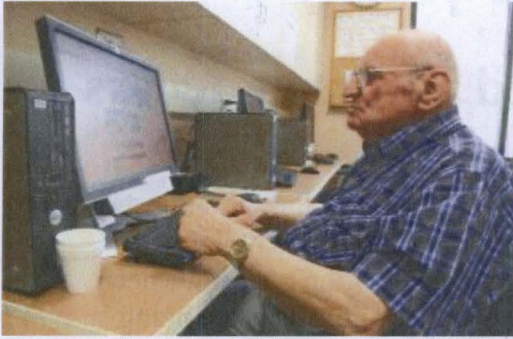
Perhaps even more troubling, usage patterns vary significantly across different segments of the state's population. For example, while nearly 90 percent of Californians age 18-29 and those who have graduated from college or who earn annual household incomes of \$60,000 or more report having broadband Internet access at home, significantly smaller slices of other groups were able to say the same.

They include adults who have not graduated from high school (32 percent of whom have broadband Internet access), Spanish-speaking Latinos (46 percent), seniors 65 or older (47 percent) and residents with annual household incomes of less than \$20,000 (53 percent).

"These findings are a sobering reminder that while we live in a state renowned for technology and innovation, the digital divide is real and impacting millions of Californians," said Sunne Wright McPeak, president and CEO of the California Emerging Technology Fund, which partnered with Field on the poll. "Fully one-quarter of California households do not have high-speed Internet at home. This is not acceptable."

One of the more intriguing findings from the poll was the growth among adults who are now connecting to broadband Internet at home solely through a smartphone. While that number is a relatively small 8 percent, it raises questions about how much and what kind of online information people are getting this way.

"Using a smartphone is a much different way of accessing the Internet than using a desktop or laptop," said Santa Clara University law professor Allen Hammond, who heads the Broadband Institute of California, an academic think tank. "While the smartphone has made information more accessible, the information comes more like a trickle than a stream."



Elias, 88, of San Ramon, uses the computer in the computer lab at San Ramon Senior Center in San Ramon, Calif. on Monday, July 7, 2014. (Jim Stevens/Bay Area News Group) ( JIM STEVENS )

The survey seemed to support Hammond's view that smartphone users often go online for different chores than those who use desktops. It showed that larger percentages of Latinos, African-Americans, noncitizens and poor households reported using only the smartphone to go online from home. And these "smartphone-only users" were far less likely to go to community or government websites or to seek health and medical information or even to take online classes. For example, while 61 percent of home-computer users said they got medical information or communicated online with their doctors, only 41 percent of smartphone-only users did so.

In a statement, McPeak said that "while mobile phones are essential devices, they are not enough to help poor Californians access many of the services they need to break out of poverty or close the education Achievement Gap." She said that despite having quick access to the Internet through their phones, students without a desktop, laptop or tablet at home are at a disadvantage when they must take assessment tests and do other school assignments using only a smartphone.

McPeak called on federal regulators to press Internet providers to offer affordable broadband service for low-income customers who qualify, and she asked the Federal Communications Commission to consider making online access easier for all Americans as large telecommunication companies continue to merge, as Comcast and Time Warner Cable are now trying to do.

"If the authorities do this right," said McPeak, "they can help close the digital divide and, in turn, close the achievement divide in schools as well."

The poll found that parents who have a broadband connection other than a smartphone at home were highly likely to go online at home to help their children learn (84 percent) and to obtain information about their children's homework and grades from the school website (75 percent).

"As technology is integrated in the classroom, poor students who only have smartphone access to the online world when they go home will fall farther behind and we all will be worse off for it," McPeak said. "This is a call to action for government, industry and philanthropic groups to work to finally close the Digital Divide in California."

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NORTHERN CALIFORNIA'S LARGEST NEWSPAPER

## Digital divide grows on high-speed Internet access

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In a state that's dependent on technological innovation to drive its economic future, it's both surprising and disturbing to learn that 25 percent of California households still lack high-speed Internet. According to a statewide Field Poll released Tuesday, home broadband adoption rates have been trading water for the past several years - and millions of disadvantaged Californians are being left behind.

What's particularly troubling about the poll is who does not have broadband at home. Only 32 percent of adults who haven't graduated from high school have home access. For Spanish-speaking Latinos, the rate is just 46 percent. Low-income households (income of less than \$20,000 per year) are at 53 percent, while people with disabilities have a rate of 59 percent.

The digital divide is alive and well.

This will have tremendous implications for the future of the next generation of Californians. Even basic jobs now require some digital skills, and it's clear from these numbers that many people in California aren't going to be able to learn those skills at home.

There are also real impacts for public health. Only 47 percent of those who are 65 and older have home broadband, and increasingly, digital connection is important to independence and quality-of-life issues. Sixty-one percent of home computer users said that they got medical information or communicated with their doctors online; the numbers are substantially lower for those without it.

There has been some progress in broadband access if you count smartphones. Higher percentages of noncitizens, Latinos, African Americans and low-income households access broadband at home using only a smartphone. (Eight percent of California adults have only a smartphone to connect to the Internet at home.) The problem is, as the poll found, people who only have a smartphone to connect to the Internet are far less likely to build digital skills, get health or medical information or access services like online banking. Parents are likelier to use a home computer to help their children with schoolwork.

A smartphone is helpful, but it's too small to use for these kinds of information-heavy activities. But these are the activities that will help Californians improve their quality of life and close the state's many achievement gaps.

What can be done now? The state has a goal to achieve 80 percent home broadband adoption by 2017. It seems unlikely to meet that without serious help. Unfortunately, expanding access to broadband is unlikely to be a priority for large telecommunications companies, many of which are merging. These large mergers, which can leave consumers with only a single broadband provider in their areas, aren't good for the country. Since they're likely to lead to higher prices, too, that means they're a threat to access for communities who are currently missing out. There's a role for federal regulators in encouraging Internet providers to offer affordable service for lower-income consumers. As far as the country's future goes, getting online has become as basic a need as phone service is.