

Statewide Survey on Broadband Adoption 2023

Internet Adoption and the “Digital Divide” in California

Results from a Survey Conducted for the California Department of Technology (CDT) and the California Emerging Technology Fund (CETF)

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About the Statewide Survey on Adoption

- **Population:** California Adults (Age 18 and Older)
- **Method of Collection:** Multimodal (RDD + Text-to-Web)
- **Languages:** English, Spanish, Mandarin, Vietnamese
- **Margin of Error:** <3% for 95% Confidence Level
- **Fieldwork Dates:** February – June 2023
- **Sampling:** Main Sample + 3 Oversamples

Sampling Strategy and Sample Size

Sample Type	Description	Amount	Total
Main Sample	Telephone Surveys Complete	1,000	1,899
	Telephone Surveys Basic	249	
	Online Text-to-Web	650	
Oversample	Rural County Regions (4)	1,059	1,661
	Low-Income HHs (Pre-Paid)	283	
	Department of Rehabilitation	319	
TOTAL			3,560

Main Topics

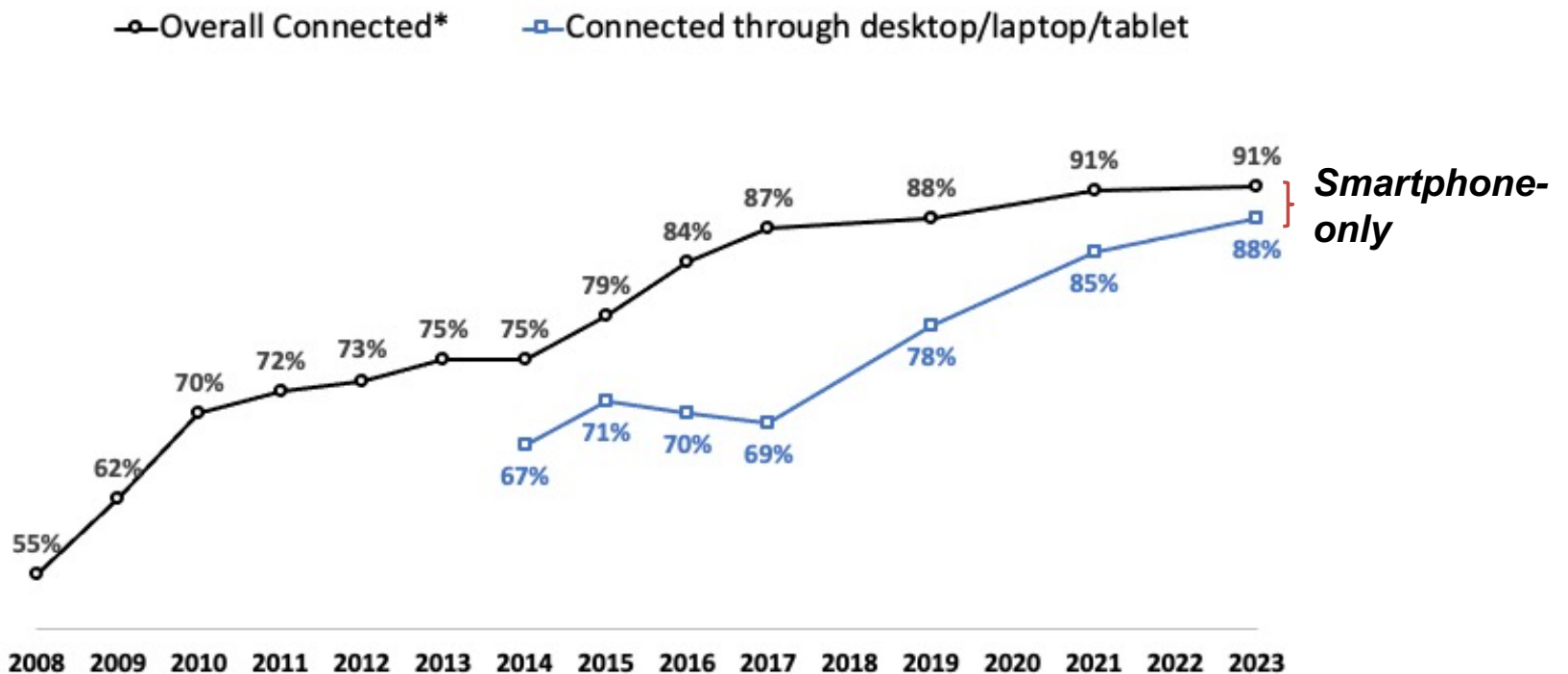
1. Adoption Across Covered Populations and Regions
2. Broadband Costs
3. Reasons for Non-Adoption
4. Service Reliability and Customer Service
5. ACP Awareness and Participation
6. Telehealth
7. Access and Devices Among K-12 Households
8. Digital Skills

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Broadband Adoption Remains High While Share of Underconnected (Smartphone-only) Continues to Drop

Broadband Adoption in California (2008-2023)

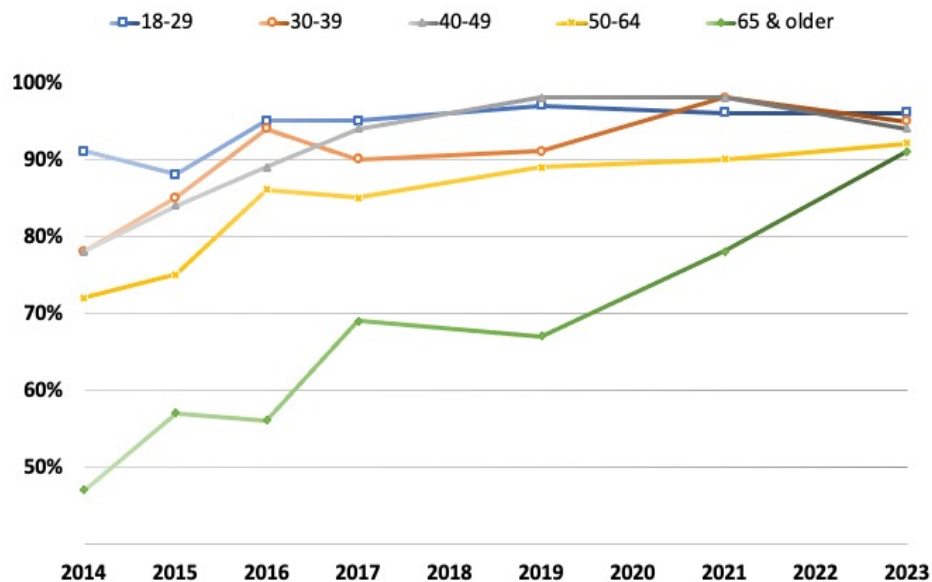


Source: 2021/23 from USC; 2017/2019 from Berkeley IGS Poll; 2014 to 2016 from The Field Poll; 2008 to 2013 from PPIC.

*Includes those who can connect to the Internet either through a desktop, laptop, tablet computer, or smartphone.

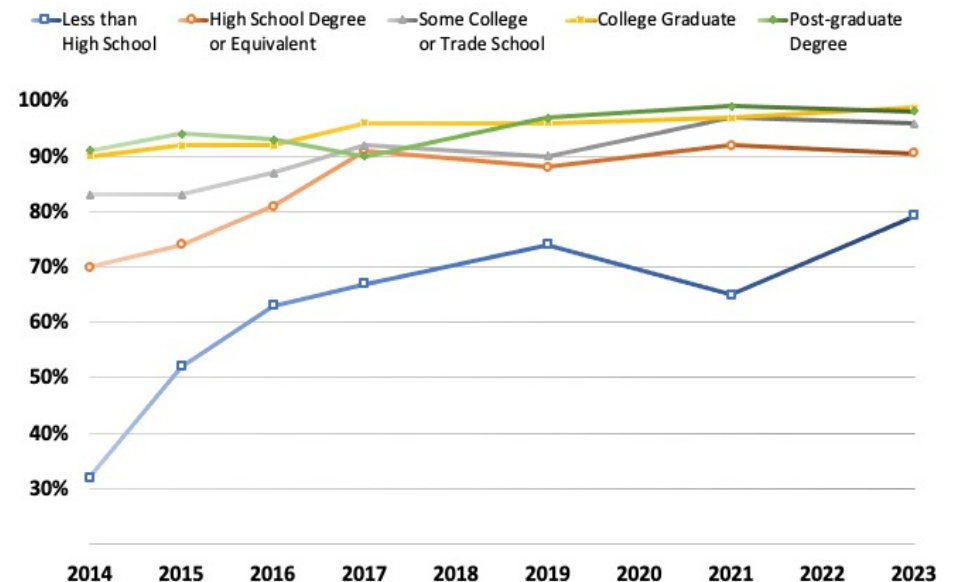
Adoption Gaps for Several Covered Populations and Disadvantaged Groups Are Closing

Broadband Adoption by Age Group (2014 - 2023)



Source: 2021/23 from USC; 2017-2019 from Berkeley IGS Poll; 2014 to 2016 from The Field Poll.

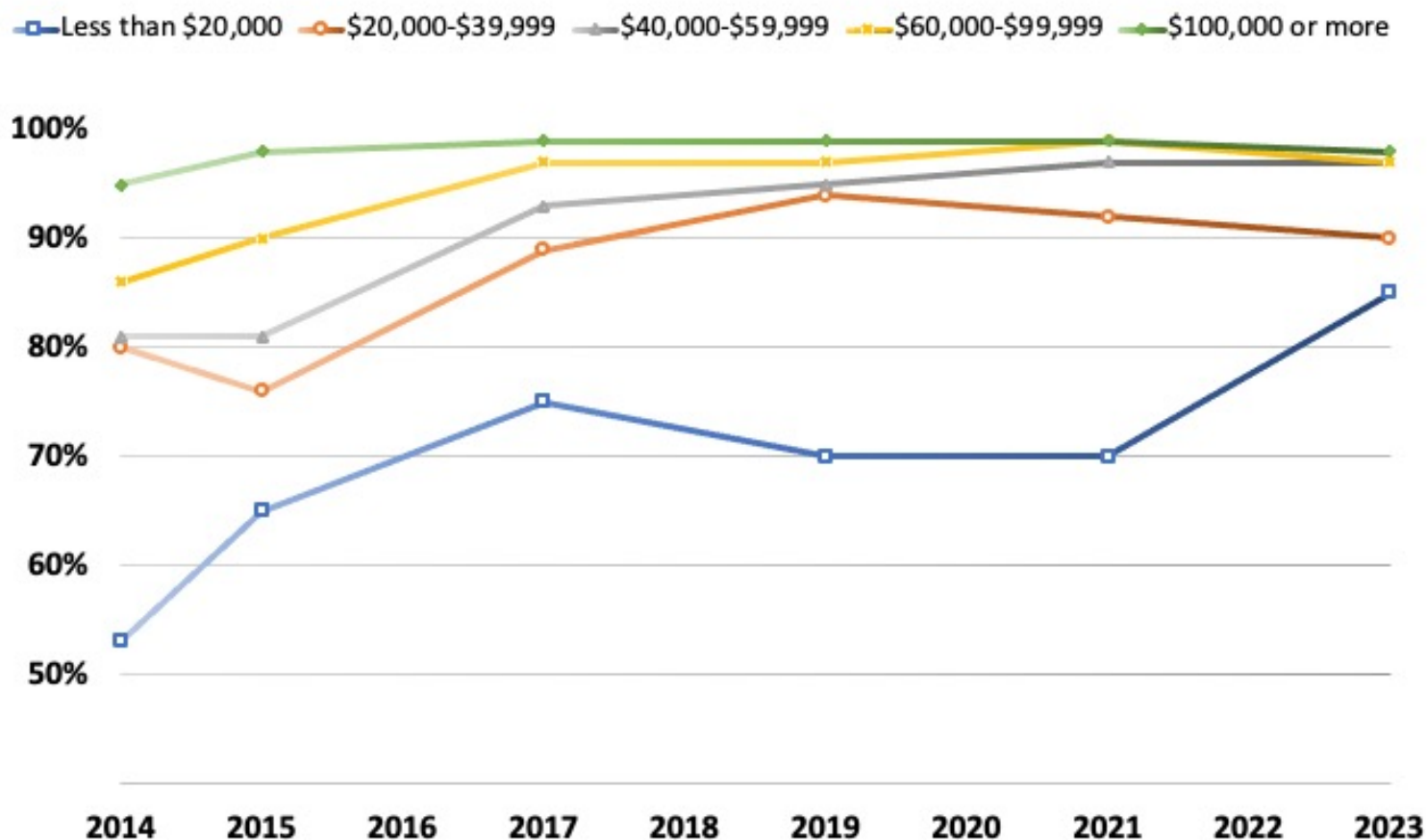
Broadband Adoption by Educational Attainment (2014 - 2023)



Source: 2021/23 from USC; 2017-2019 from Berkeley IGS Poll; 2014 to 2016 from The Field Poll.

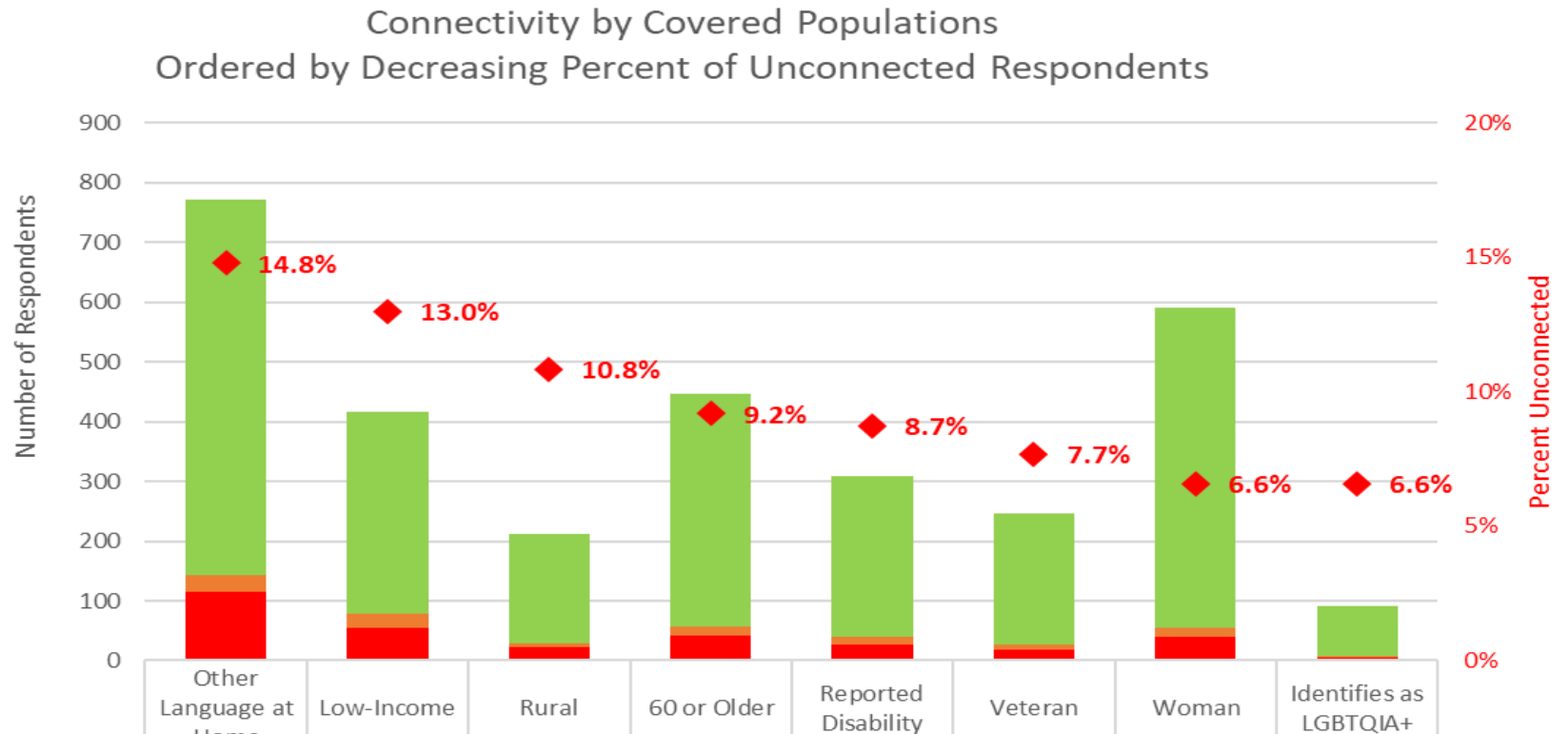
Income Gap in Broadband Adoption Has Decreased Thanks to Jump in Adoption Among the Poorest Households (<20K)

Broadband Adoption by Household Income (2014 - 2023)



Source: 2021/23 from USC; 2017-2019 from Berkeley IGS Poll; 2014 to 2016 from The Field Poll.

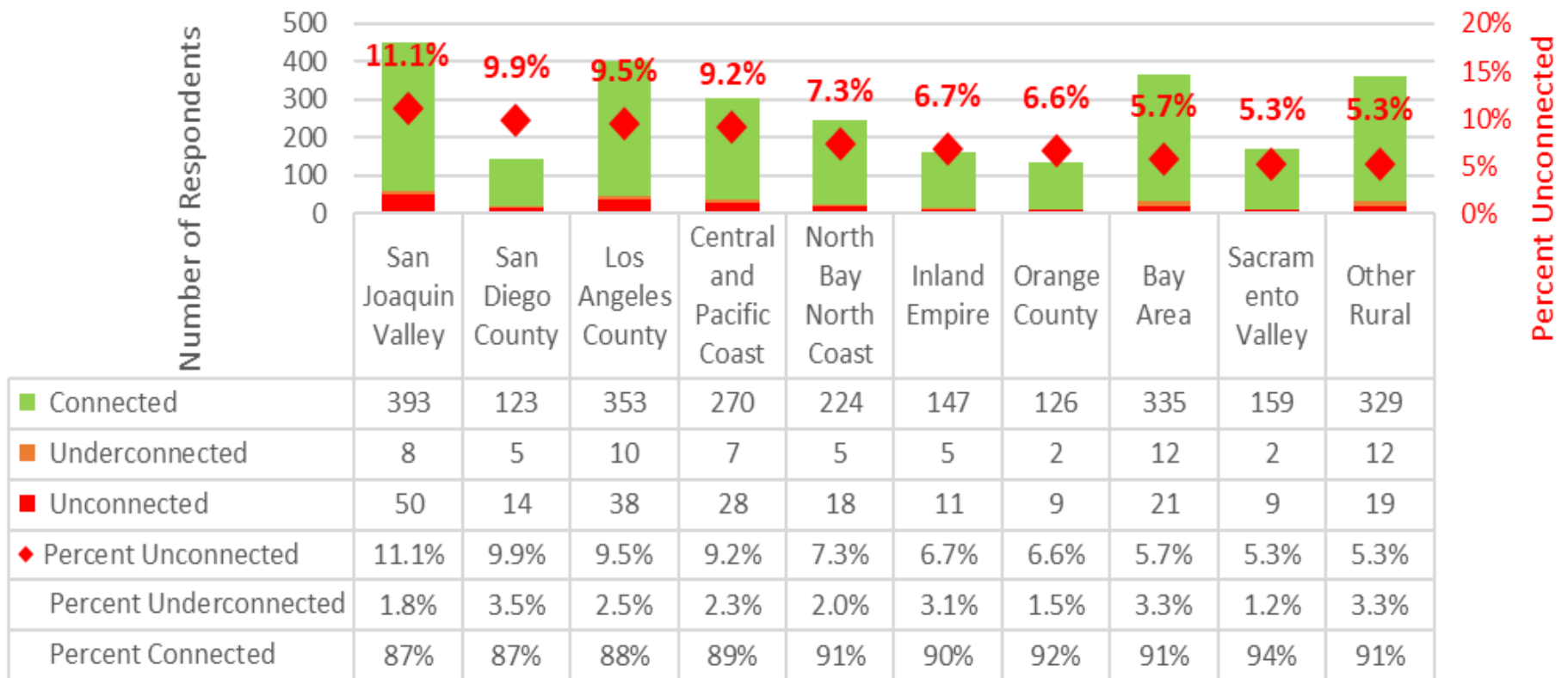
Covered Populations: Low-income and Households with Language Barriers Still Lag Behind in Broadband Adoption



Main Sample; All Respondents

Main + rural oversample: Broadband Adoption Varies Across the State, San Joaquin Valley Lags Behind Other Regions

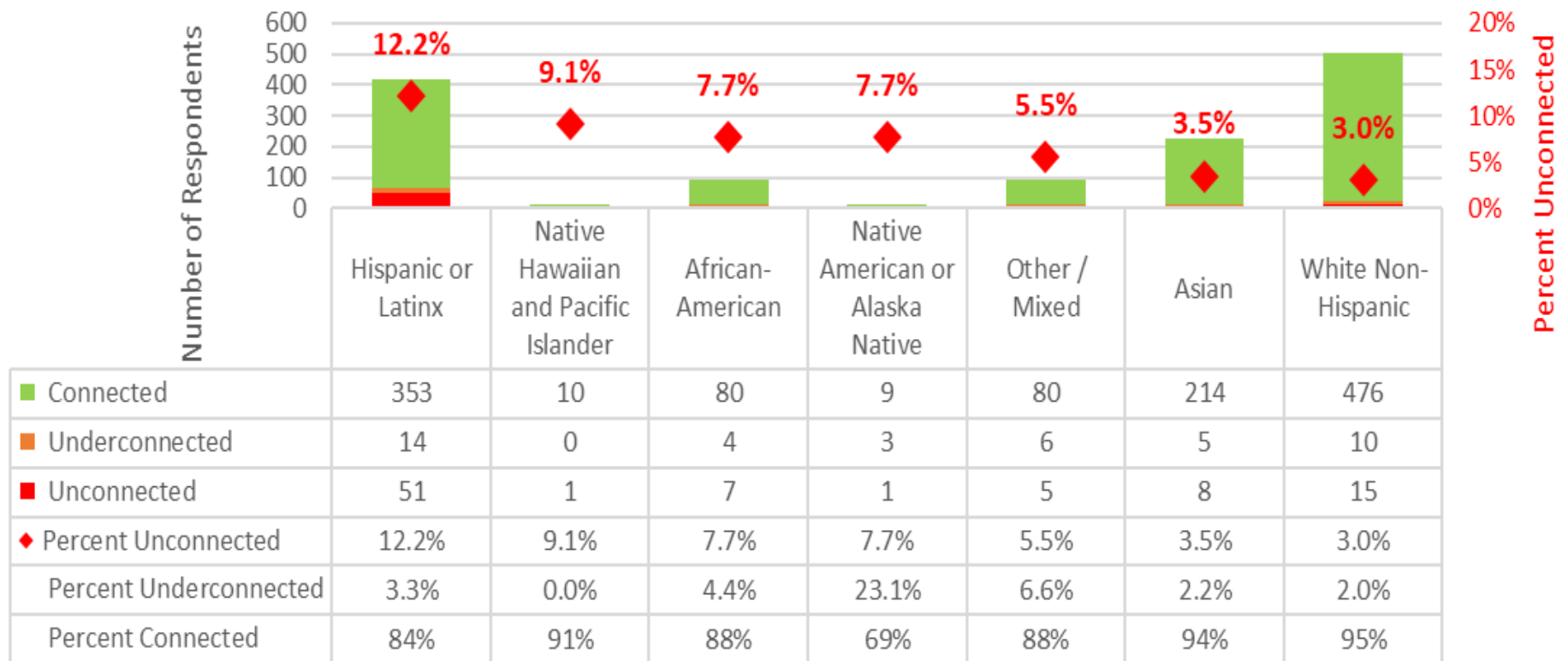
Connectivity by Region
Ordered by Decreasing Percent of Unconnected Respondents



Main Sample and Rural Counties Oversample; All Respondents; Valid Responses n = 2744

Hispanic/Latinx Residents More Likely to be Unconnected than Other Racial/Ethnic Groups

Connectivity by Race and Ethnicity
Ordered by Decreasing Percent of Unconnected Respondents



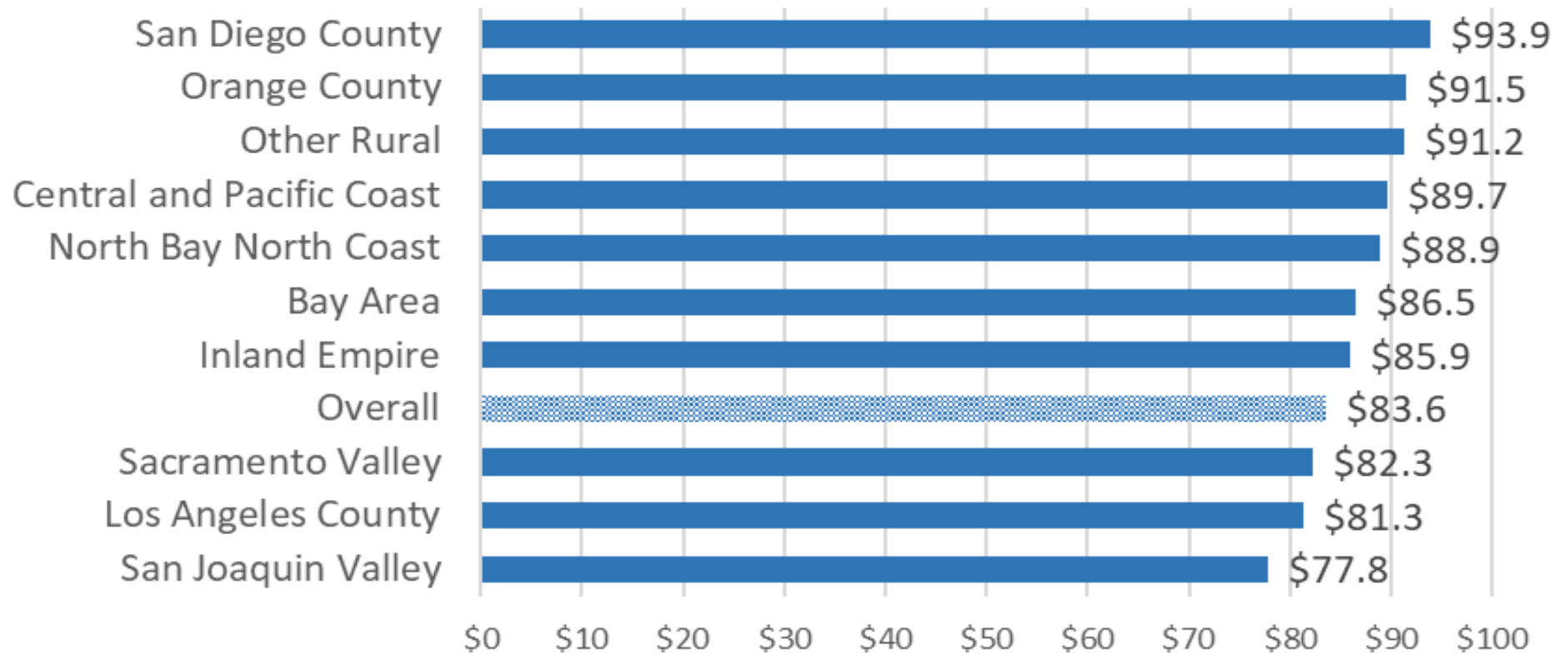
Main Sample; All Respondents; Valid Responses n = 1352

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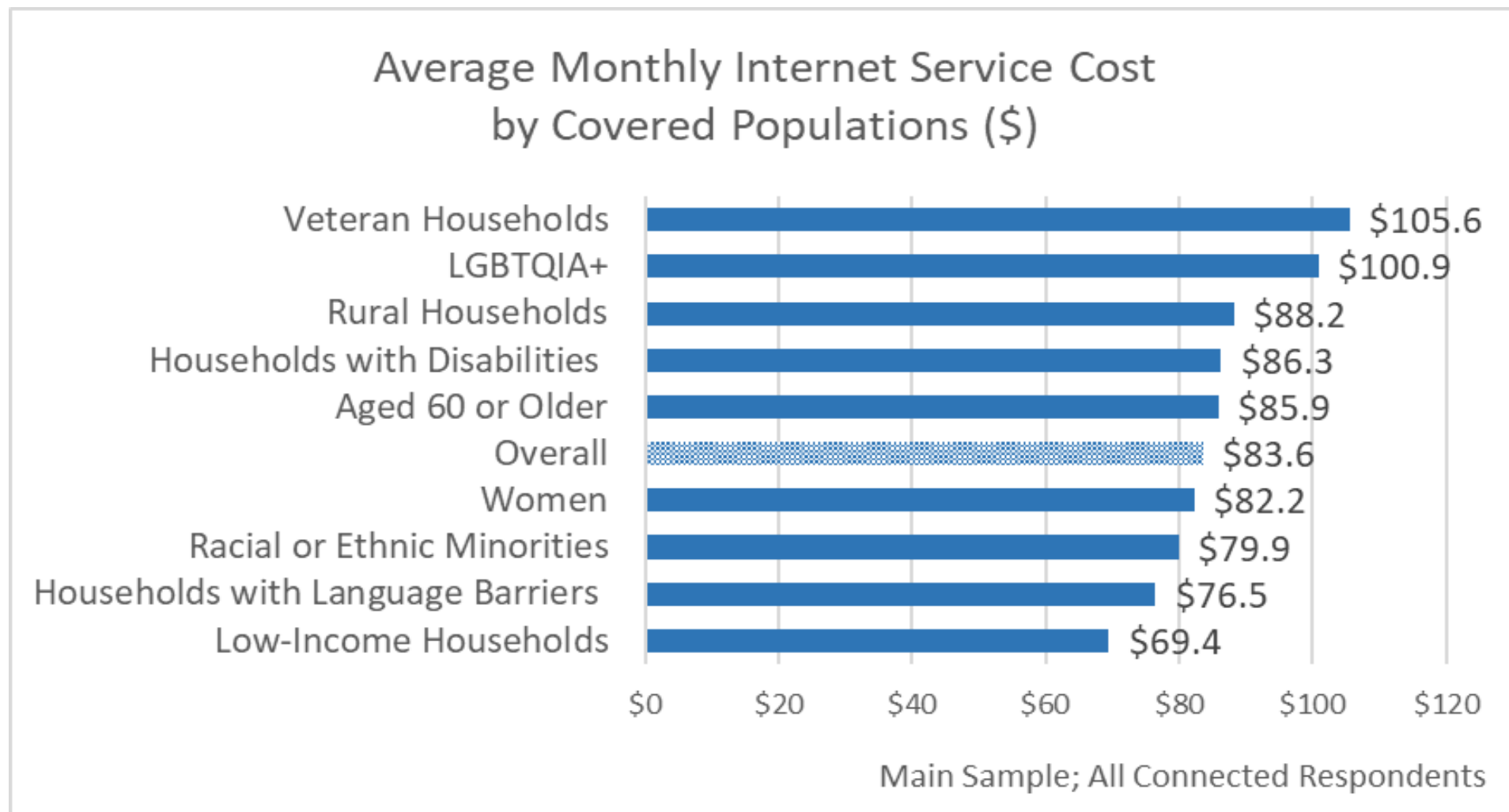
Average Cost of Broadband in CA \$83.6/month, Generally Higher in Rural Areas

Average Monthly Internet Service Cost by Region (\$)



Main Sample and Rural Counties Oversample; All Connected Respondents

Higher than Average Broadband Costs for Several Covered Populations



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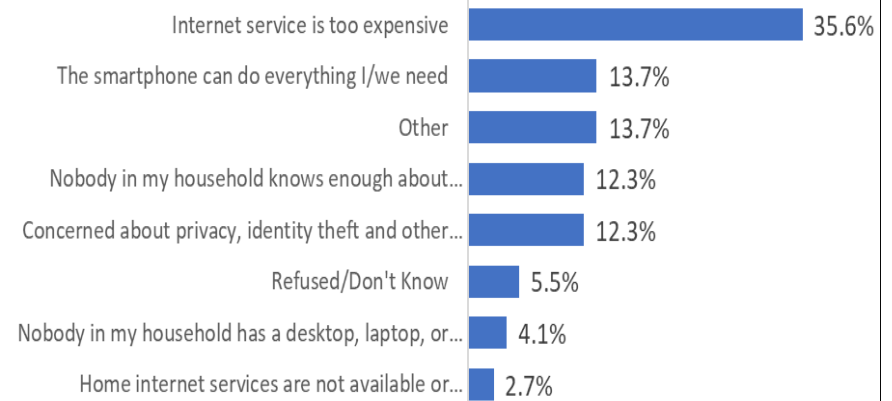
Cost Is the Main Barrier to Broadband Adoption, Followed by Concerns About Privacy

Reasons for Not Having Internet (Multiple Answers)



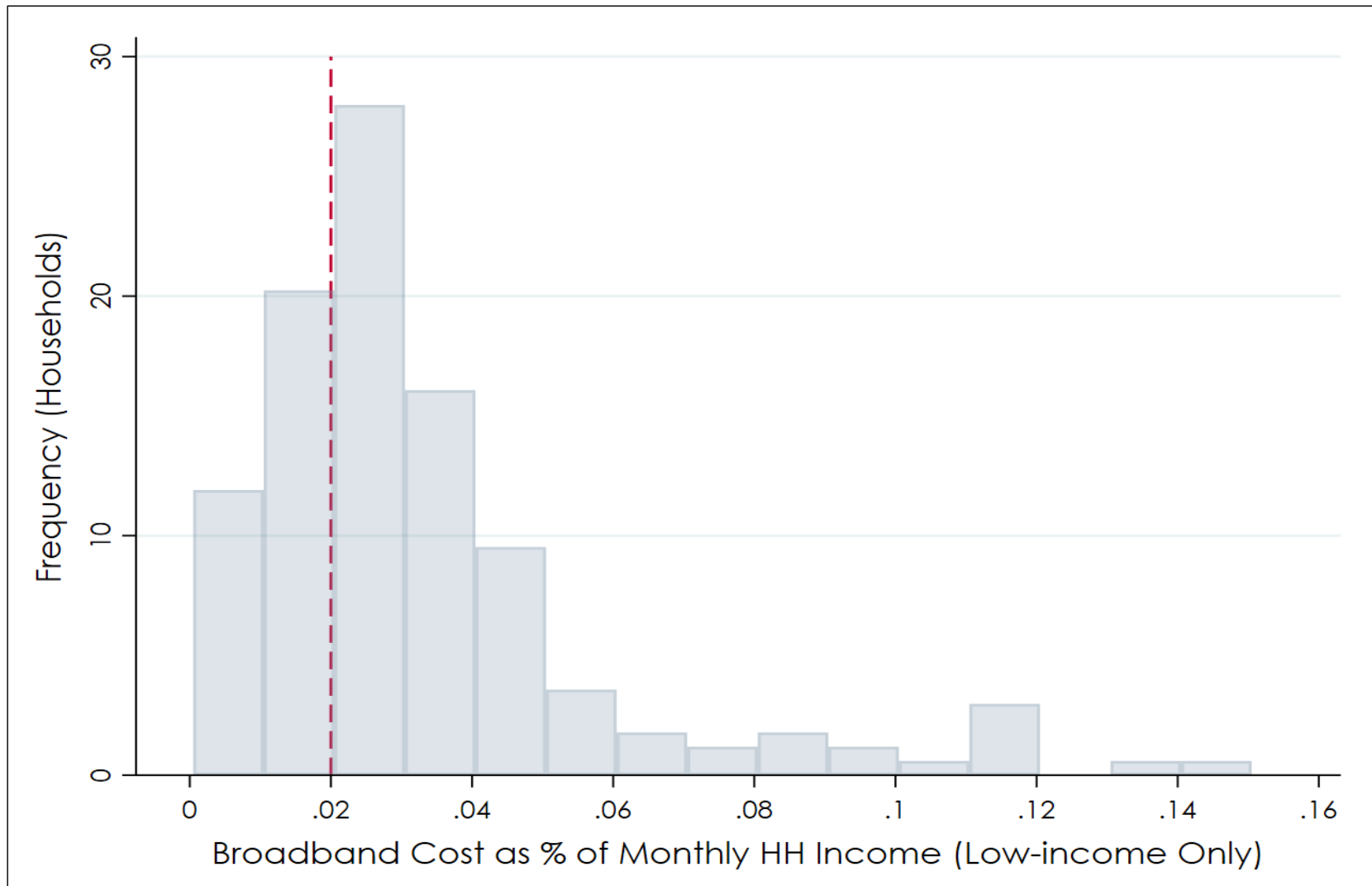
Main Sample; Unconnected and Underconnected Respondents ; Valid Responses n= 118

Top Reason Why not Connected (Single Response)

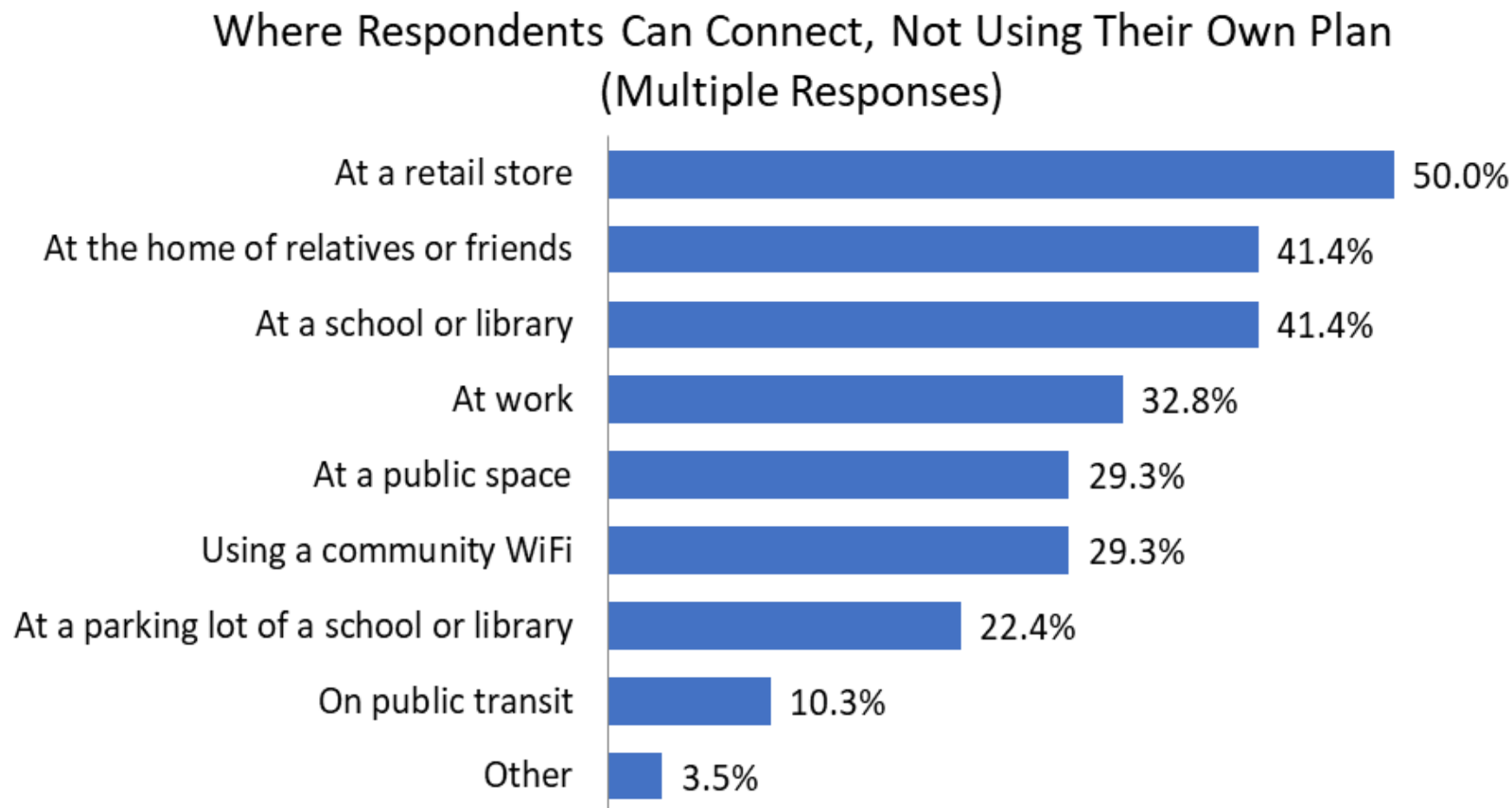


Main Sample; Underconnected and Unconnected Respondents; Valid Responses: n=73

For Most Low-income Households (~70%), Cost Exceeds FCC-recommended Threshold (2% of Disposable Income)



Public/Community Broadband Remains a Key Access Alternative for Unconnected Households



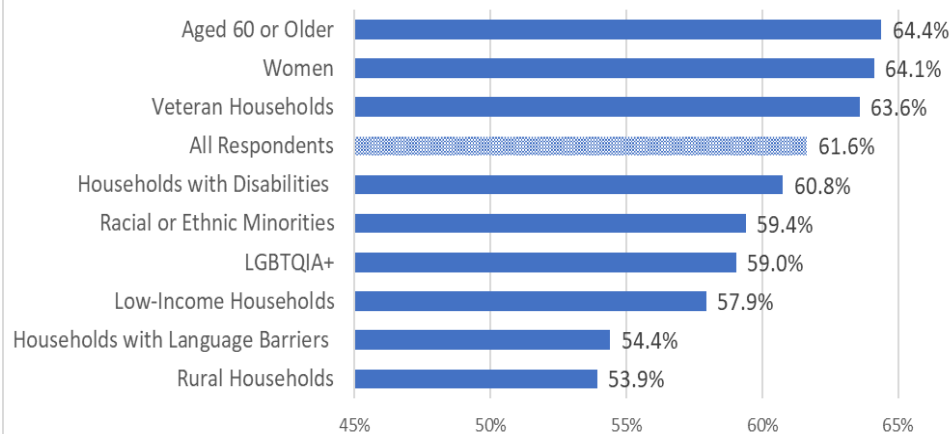
Main Sample; Unconnected and Underconnected Respondents ; Valid Responses n= 58

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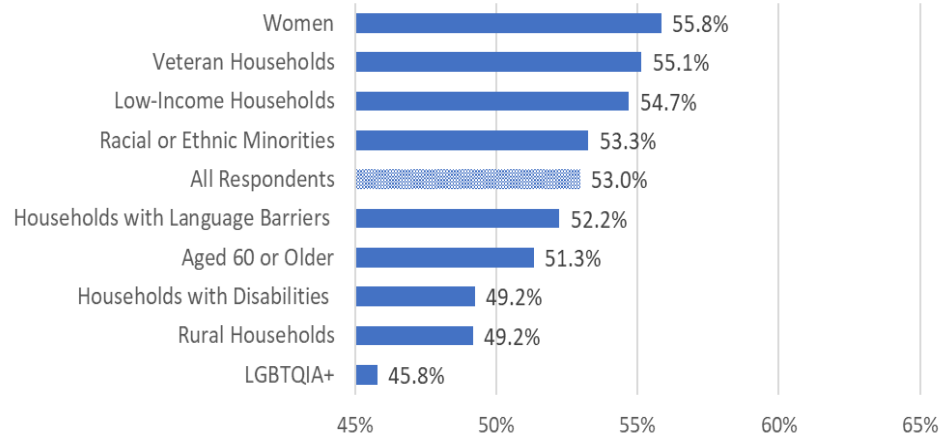
Most Respondents Consider Broadband Service Reliable, Lower Level of Satisfaction with Customer Service

Internet Reliability: Percent of High Ratings (4s and 5s)
Ordered by Declining Reliability Rating



Main Sample; All Connected Respondents

Customer Service: Percent of High Ratings (4s and 5s)
Ordered by Declining Service Rating



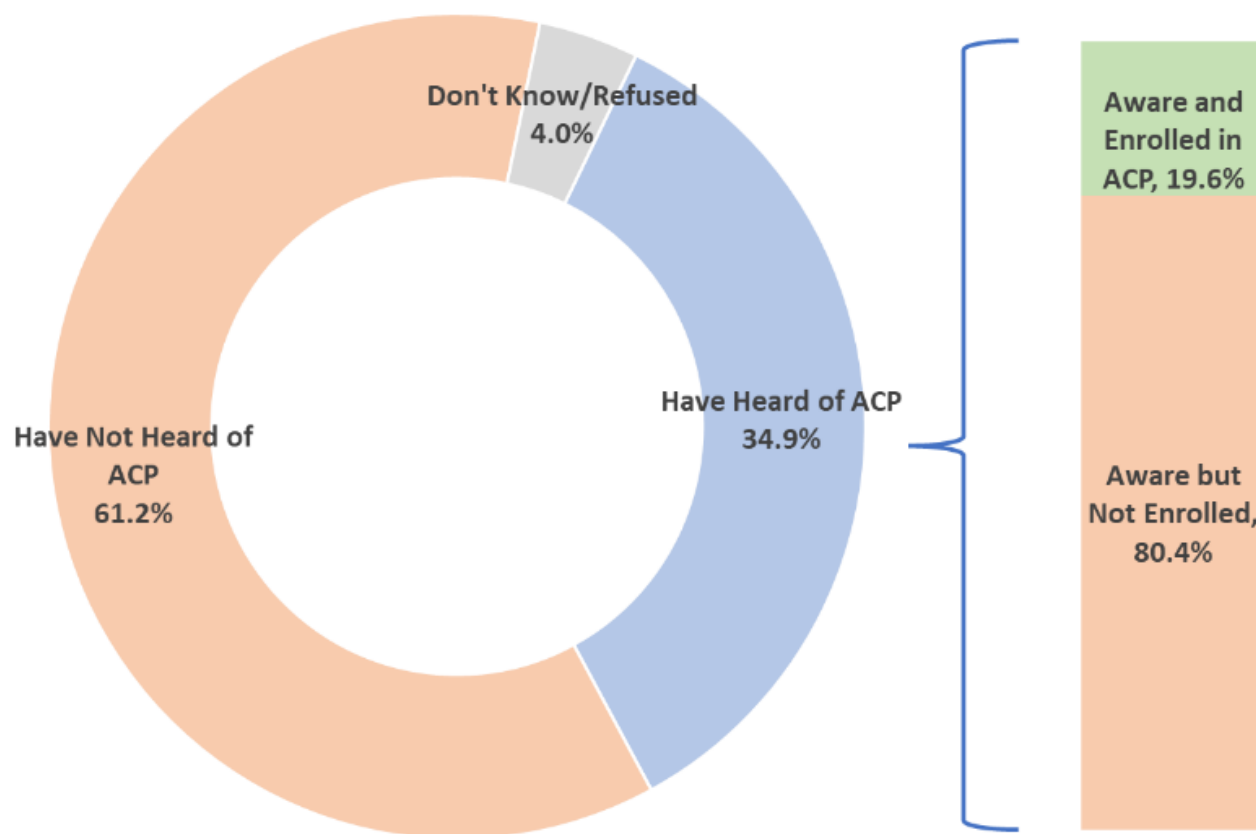
Main Sample; All Connected Respondents

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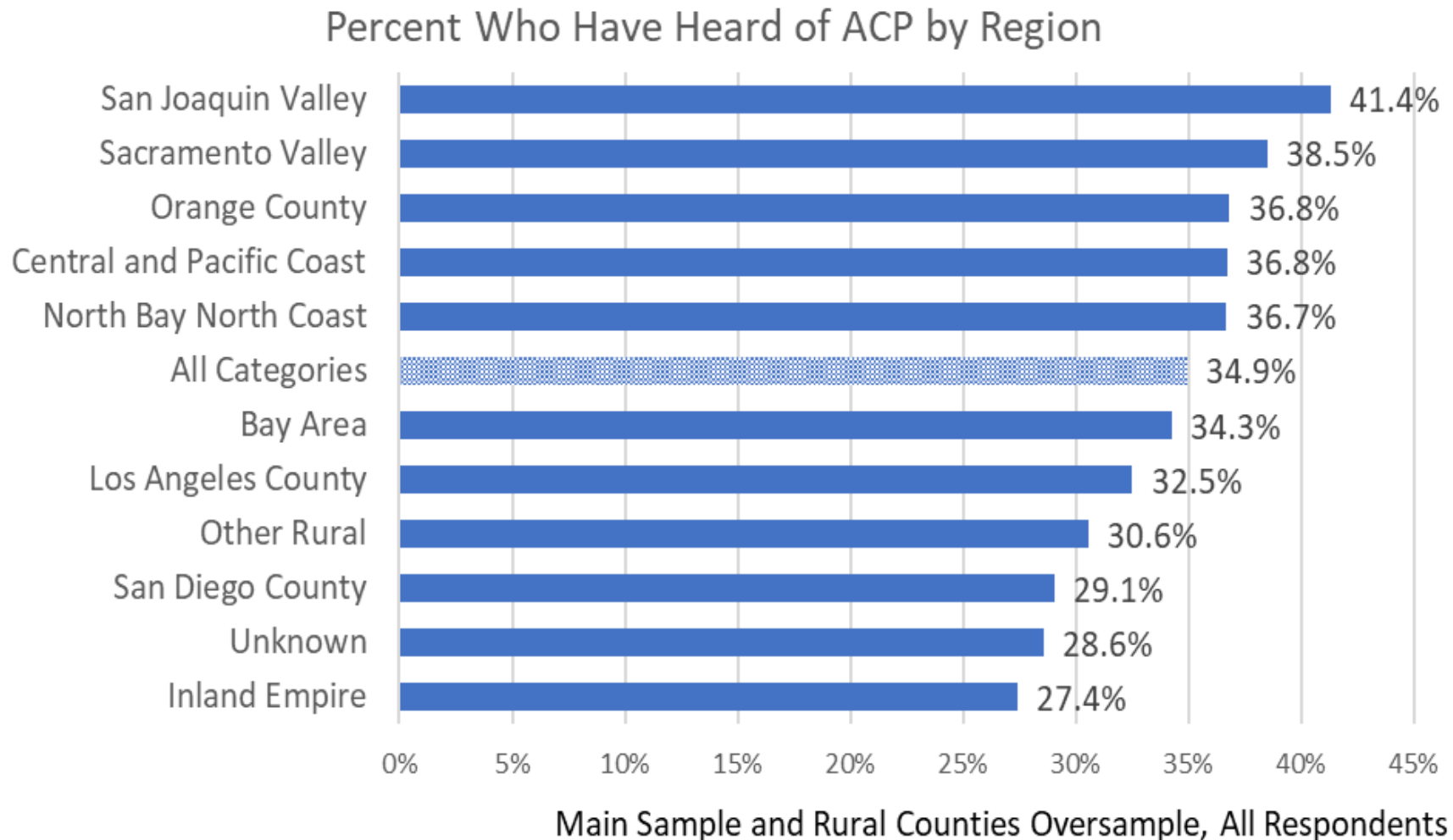
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ACP Awareness and Participation Rates Remain Low Among Eligible Households

ACP Awareness and Enrollment Among ACP Eligible Respondents

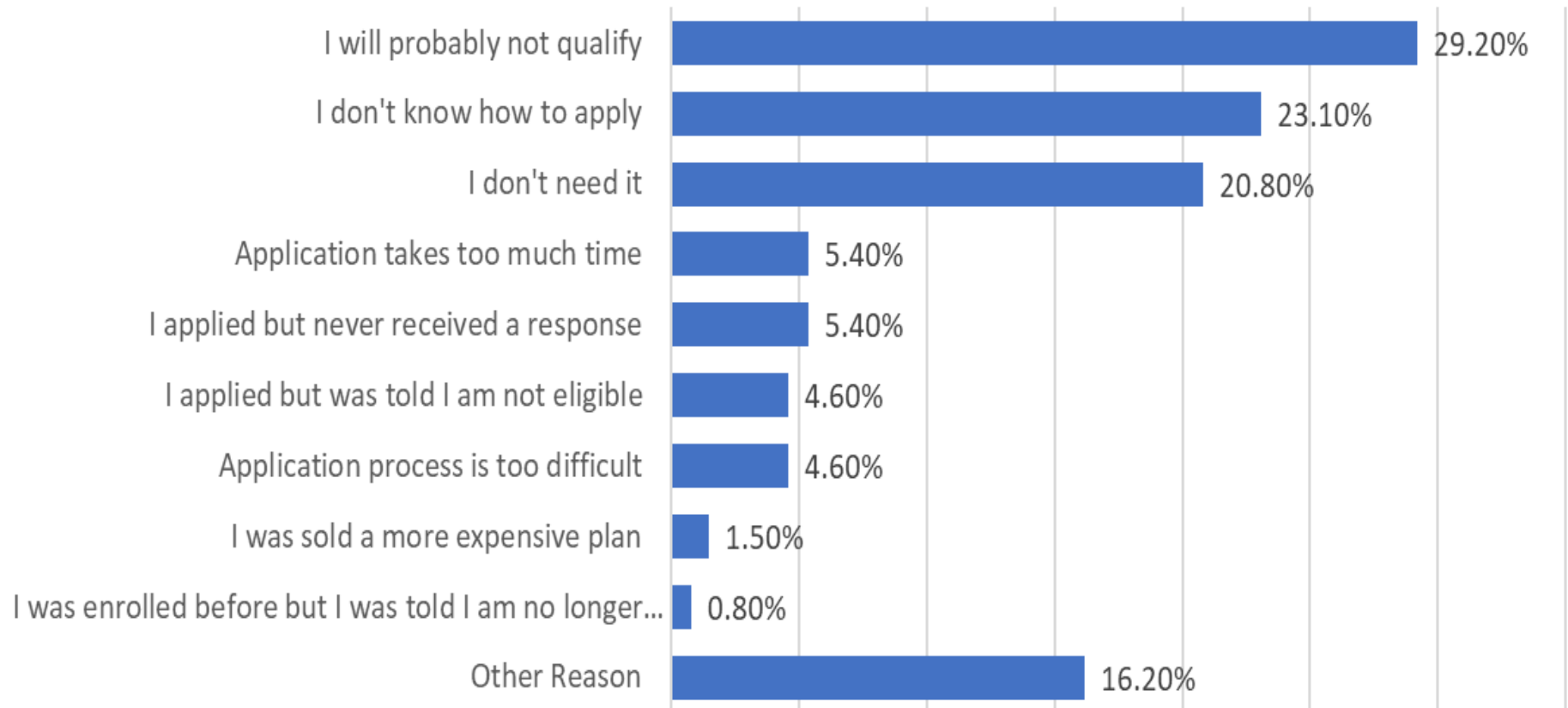


ACP Awareness Varies Across the State, Higher in San Joaquin/Sacramento Valley, Lower in Inland Empire



Beyond Awareness, Lack of Information/Misinformation Also Reduce Participation in ACP and Similar Programs

Why are you not currently enrolled in ACP or Other Discount Programs?



Main Sample; ACP Eligible and Not Enrolled

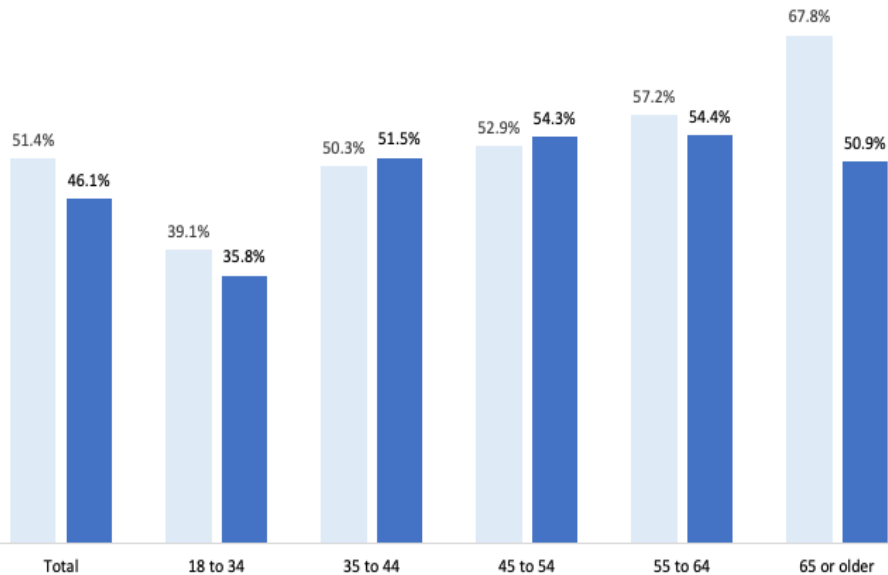
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Following Pandemic Surge, Telehealth Utilization Has Declined in Particular for Older Adults

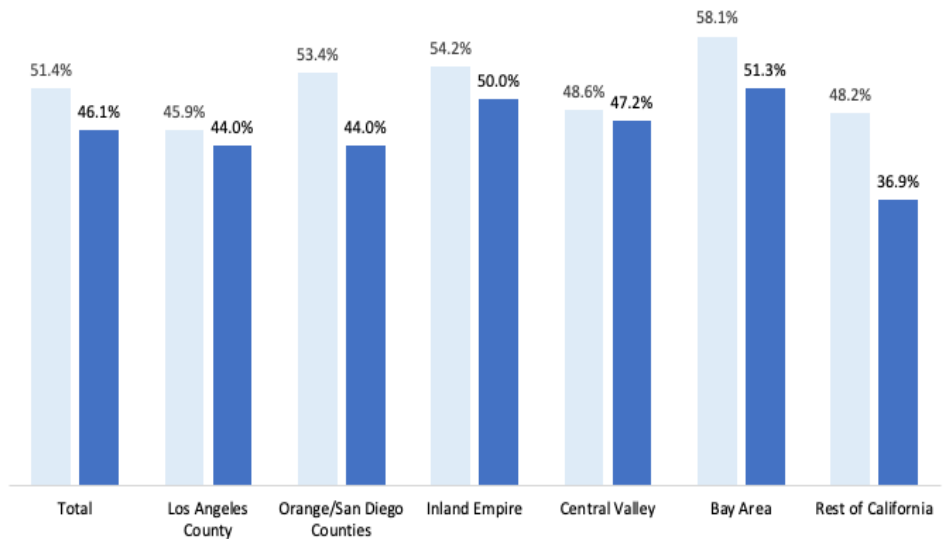
Telehealth utilization by age group (2021 -2023)

2021 2023

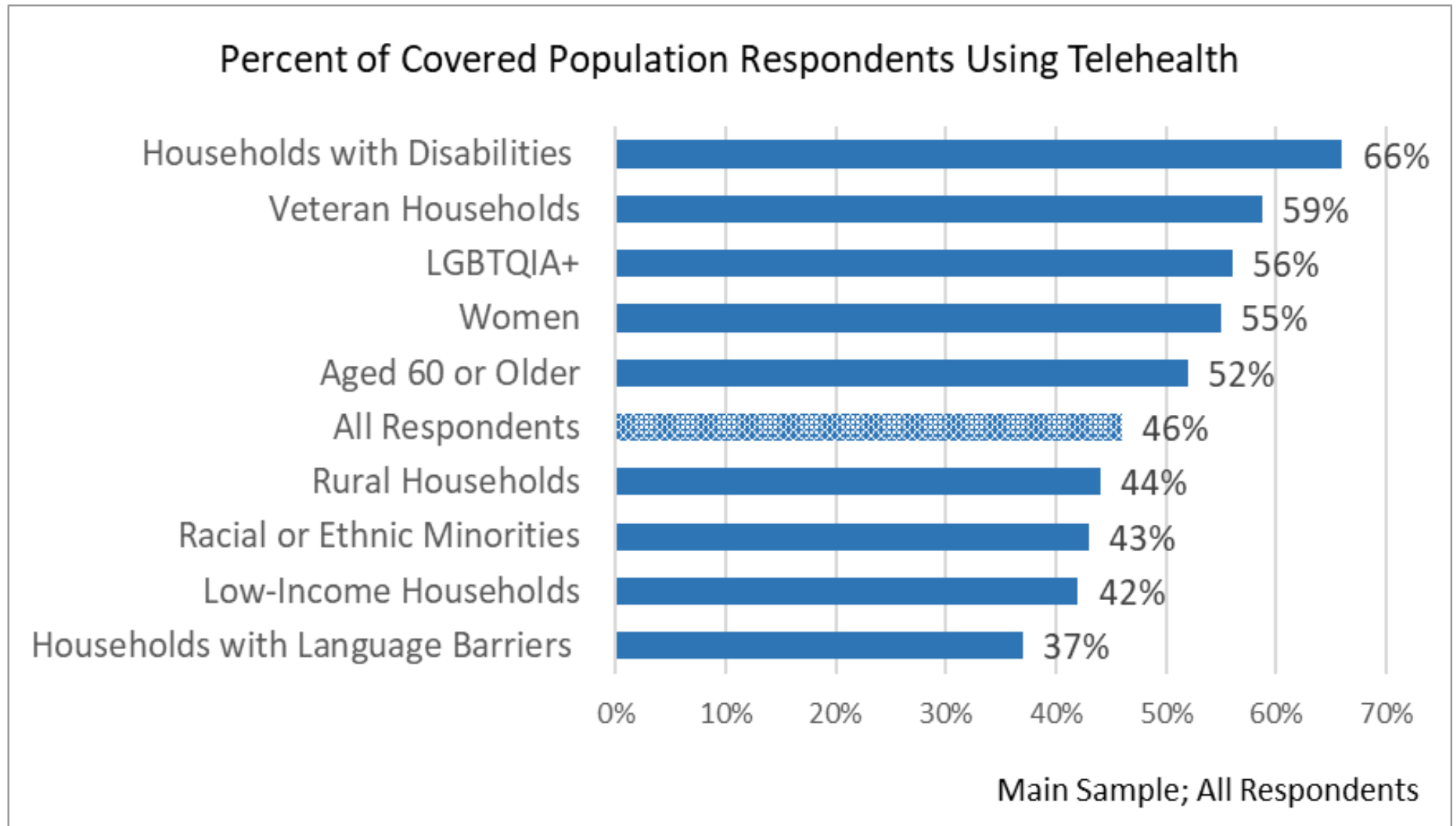


Telehealth utilization by region (2021 - 2023)

2021 2023



Telehealth Utilization Lower for Those With Language Barriers and Low-income Households

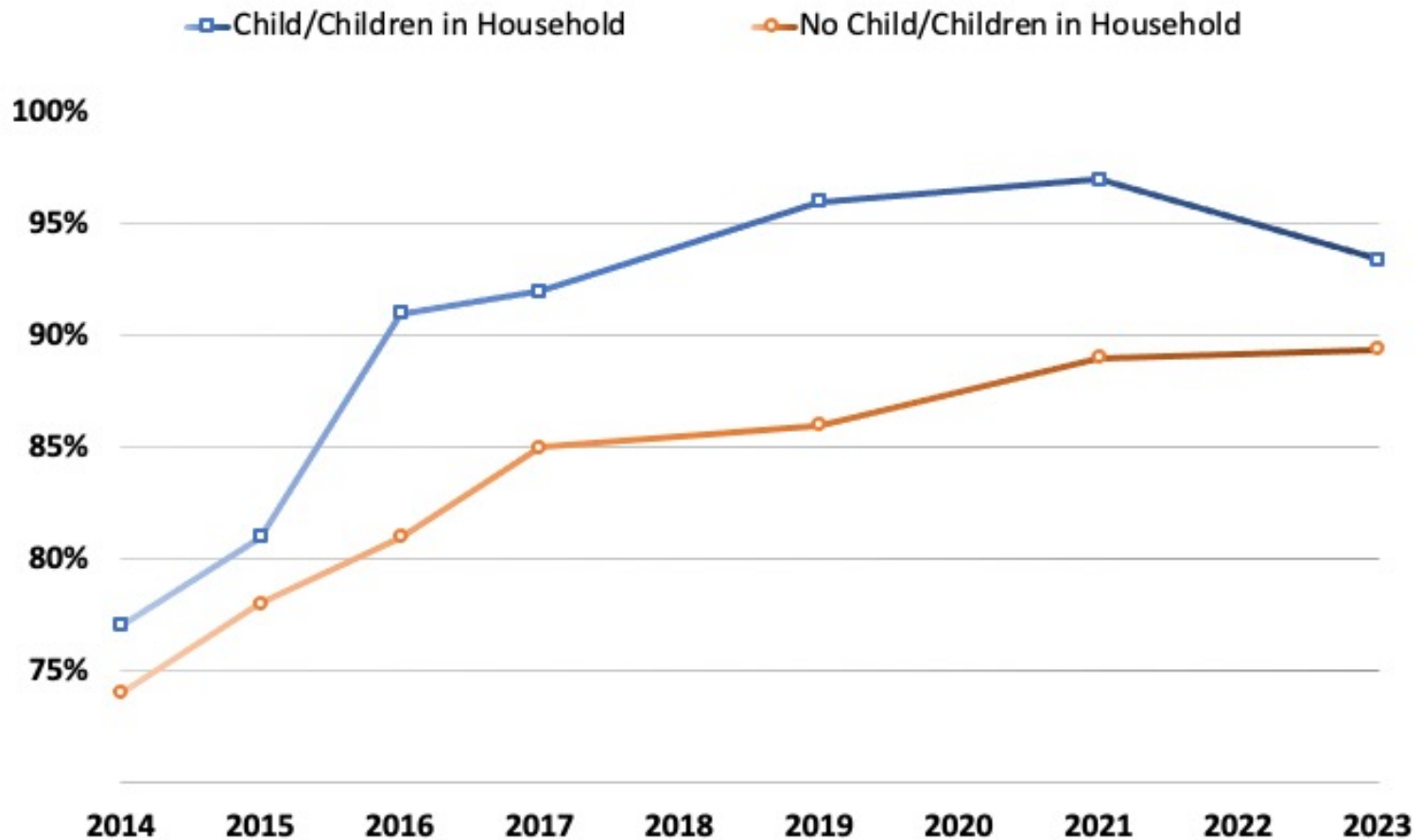


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Broadband Adoption Among K-12 Households Has Decreased to Just Below Pre-pandemic Levels

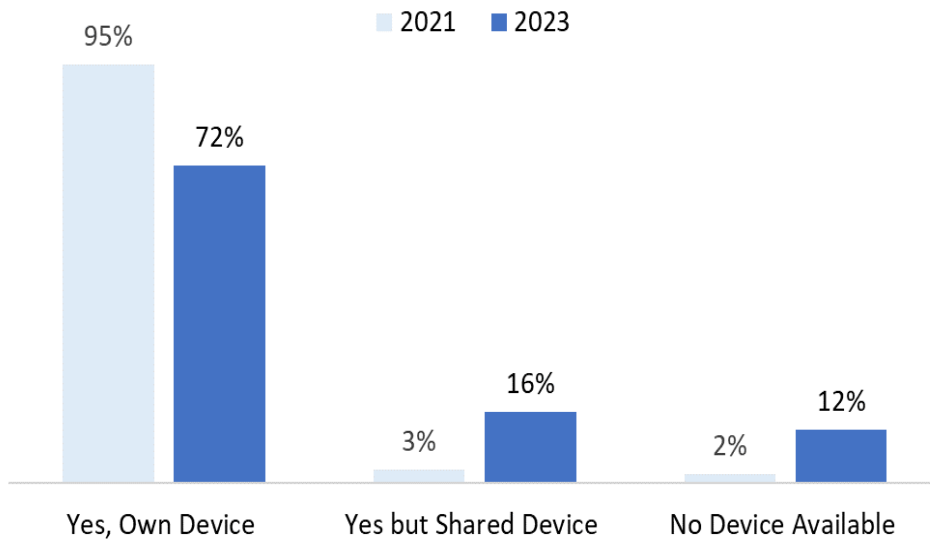
Broadband Adoption by Presence of School-Age Children (2014 - 2023)



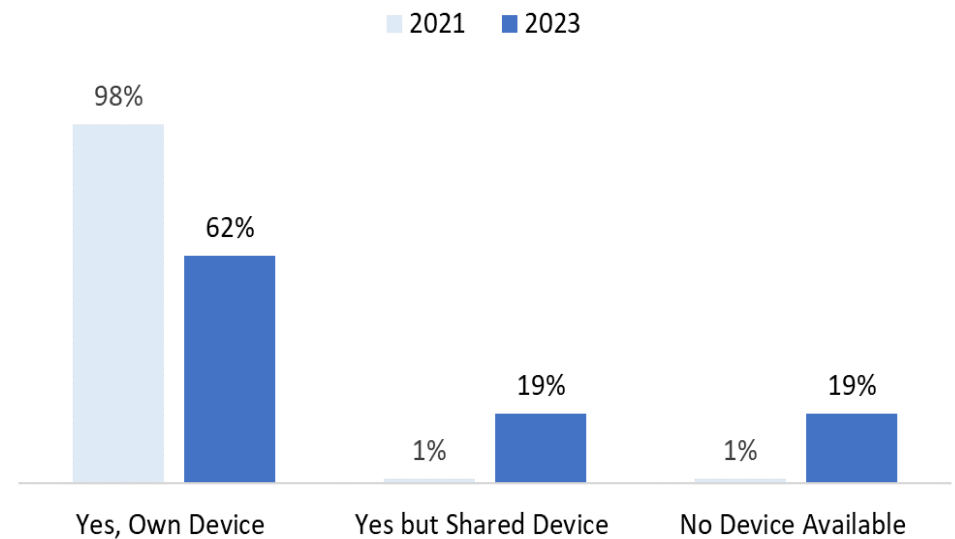
Source: 2021/23 from USC; 2017-2019 from Berkeley IGS Poll; 2014 to 2016 from The Field Poll.

Device Availability Has Also Decreased, in Particular Among Low-income K-12 Households

Availability of Device in Households with School-Age Children



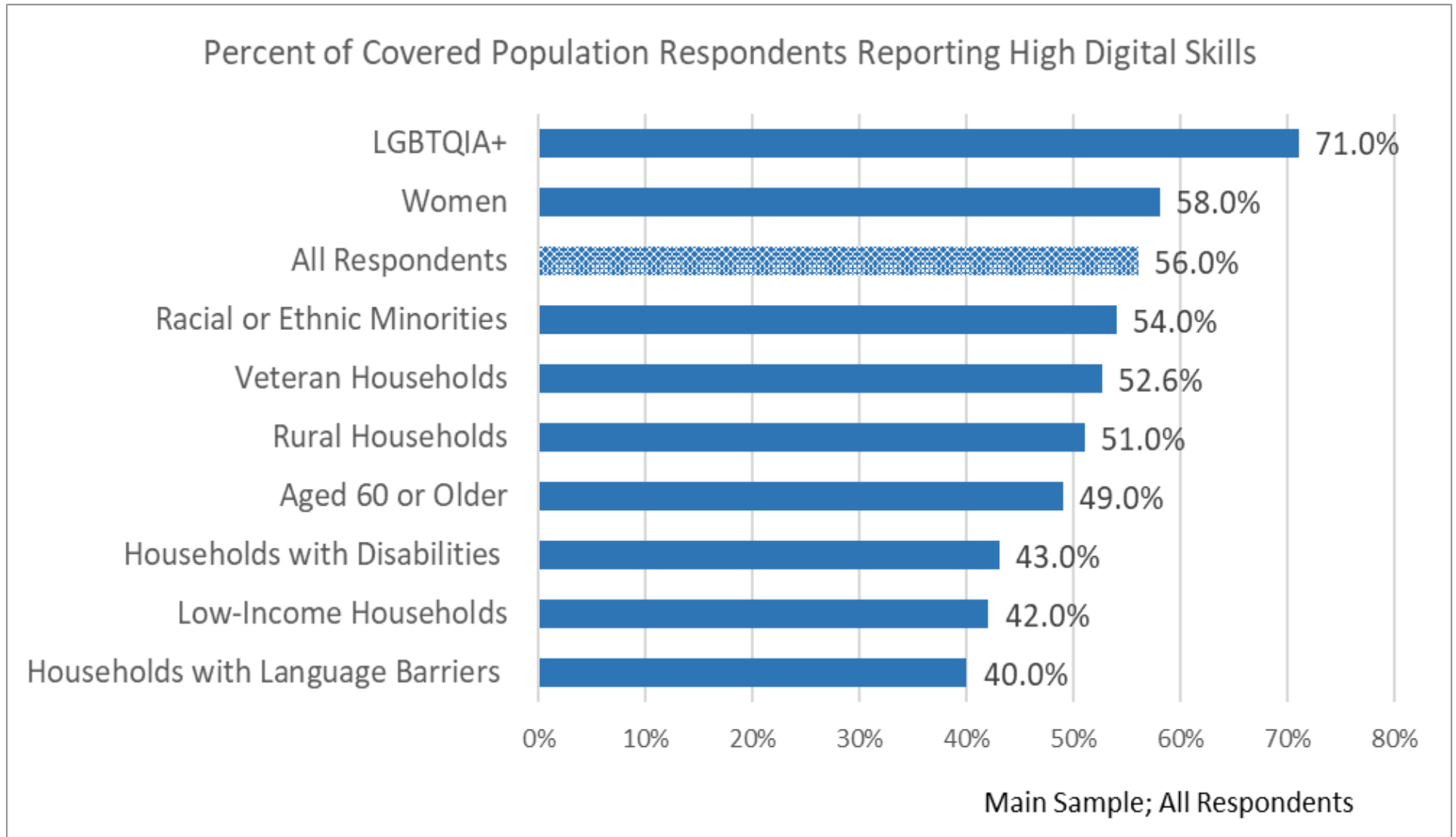
Device Availability Among K-12 Low-Income Households



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Share of High-skills Users is Lower Among Non-English-Language HHs, Low-income HHs, and HHs with Disabilities



THANK YOU

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