



Broadband Demand

Northeastern & Upstate California

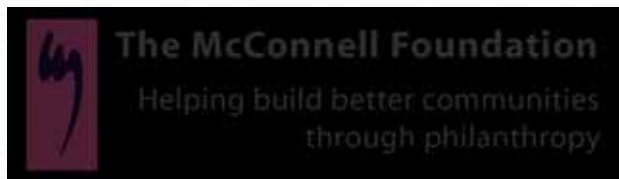
Connect Projects'

Highlights

California Emerging Technology Fund

Rural Connect Workshop

May 13th & 14th, 2010



Agenda

- I. Survey Highlights
- II. Observations
- III. Interactive GIS Web Application
- IV. Next Steps
- V. Q & A

Survey Highlights

- Background:
 - Random telephone interviews – 12 counties
 - 4,200 surveys completed, 3 mons.,
6/3/09-9/1/09
 - Who does/does not have internet access?
 - How important is internet access to your home or business?
 - How willing are you to pay more for faster internet service to your home or business?

Those who do and do not have Internet access

These are raw numbers, calculated as a percentage of the total sample, per segment.

	Northeast		Upstate	
	Hh N=1800	Bz N=800	Hh N=1200	Bz N=400
Those who do have (includes underserved)	59.5	83.2	53.7	78.9
Those who do not have (unserved)	40.5	16.8	46.3	21.1

How important is Internet access at your home?

Importance	Northeast	Upstate Percent
Extremely important	44.6	38.0
Important	13.8	15.3
Somewhat important	11.0	9.9
Sub-total	69.4	63.2
Not important	29.6	34.2
Not sure/don't know	1.0	2.5
Total	100.0	100.0

Would you be willing to pay more for a faster Internet connection to your home?

Willing to pay more?	Northeast Percent	Upstate Percent
Yes	11.3	8.2
No	88.7	91.8
Total	100.0	100.0

How important is Internet access to your business?

Importance	Northeast	Upstate
Extremely	63.8	60.7
Important	12.4	9.1
Somewhat	5.8	9.3
Sub-total	82.0	79.1
Not important	17.9	19.7
Not sure/don't	0.1	1.2
Total	100.0	100.0

Would you be willing to pay more for a faster Internet connection to your business?

Willing to pay more?	Northeast Percent	Upstate Percent
Yes	17.3	15.1
No	82.7	84.9
Total	100.0	100.0



How do you use the Internet?

**(household and business survey
respondents)**

Internet Uses	Northeast	Upstate Percent	+/-
Finding information on the World Wide Web	70.3	62.3	-8.0
Communicating electronically	68.1	60.8	-7.3
Purchasing items/services on-line	50.2	38.1	-12.1
Assessing financial services and information	43.0	34.3	-8.7
Assessing government services and information	42.3	32.9	-9.4
Uploading or downloading music, web casts, pod casts, or video	31.6	27.9	-3.7
Assessing health care services	30.1	23.7	-6.4
Doing job-related work on-line	29.2	25.1	-4.1
I don't use the Internet	24.1	34.1	+10.0
Gaming	18.7	19.0	+0.3
Selling items/services on-line	18.4	13.4	-5.0
Taking on-line classes	14.6	12.9	-1.7
Other	1.3	1.5	+0.2

Internet Uses	Northeast Percent	Upstate Percent	+/- Δ
Looking up information on the World Wide Web	81.3	75.9	-5.4
Communicating electronically	77.5	74.0	-3.5
Purchasing items/services on-line	67.8	62.2	-5.6
Accessing government services and information	63.6	60.2	-3.4
Accessing financial services and information	53.5	51.1	-2.4
Company Web site	48.1	41.3	-6.8
Accessing health care services	6.8	30.5	+23.7
Selling items/services on-line	32.5	29.7	-2.8
Taking on-line classes	27.4	25.3	-2.1
Uploading or downloading music, web casts, pod casts, or video	31.1	24.8	-6.3
I don't use the Internet	14.5	18.9	+4.5
Providing on-line classes	5.5	6.1	+0.6
Other	1.0	1.2	+0.1
Refused to answer or don't know	2.1	1.7	-0.4

Percentage of all respondents

Those who do not have Internet access to the home or business selected the following reasons (N=4200):	% NE Hh	% UP Hh	% NE Bz	% UP Bz
I don't need the Internet	21.2	26.2	11.5	16.5
I don't use a computer	19.3	29.1	6.8	9.8
Internet access is too expensive	3.6	4.6	0.8	1.5

Observations

- Majority of those who do not have Internet access, cited a) ***do not use a computer*** and b) ***do not need the Internet*** as the #1 & #2 responses.
- Majority said Internet access is important, but a higher majority said they are ***unwilling*** to pay more for a faster Internet connection.
- However, 95+% say it is not too expensive...
- Upstate businesses use Internet to access health services information ***4.5 x more*** than Northeast businesses.
- Therefore, adoption strategies will be different throughout the state.
- Question is, what will/should those adoption strategies look like?

Community Workshops

- Sustainable Broadband: Developing Strategies
 - Same agenda, same structure, same questions

Northeast: Redding, 8/4/10, 7 counties, 26 attendees	Upstate: Colusa, 7/23 /09, 5 counties, 27 attendees
Telecommuting; Live remote medical assistance Distance learning Telemedicine Online learning/outreach ED/alternative education to remote facilities Home/internet-based businesses Public safety, public meetings Library e-centers Community access to specialists Broadcast Public Meetings	Telemedicine Education E-Government Safety (Public) Partnerships Level the Playing Fields Plug Holes Training Expanding Services Public Computing Centers (Libraries)

- Upstate attendance = 7:1, female to male;
- Northeast attendance = 5:1, male to female.