

Broadband Adoption: Patterns, Behaviors, and Implications

Presented to the New Jersey Connected Broadband Summit

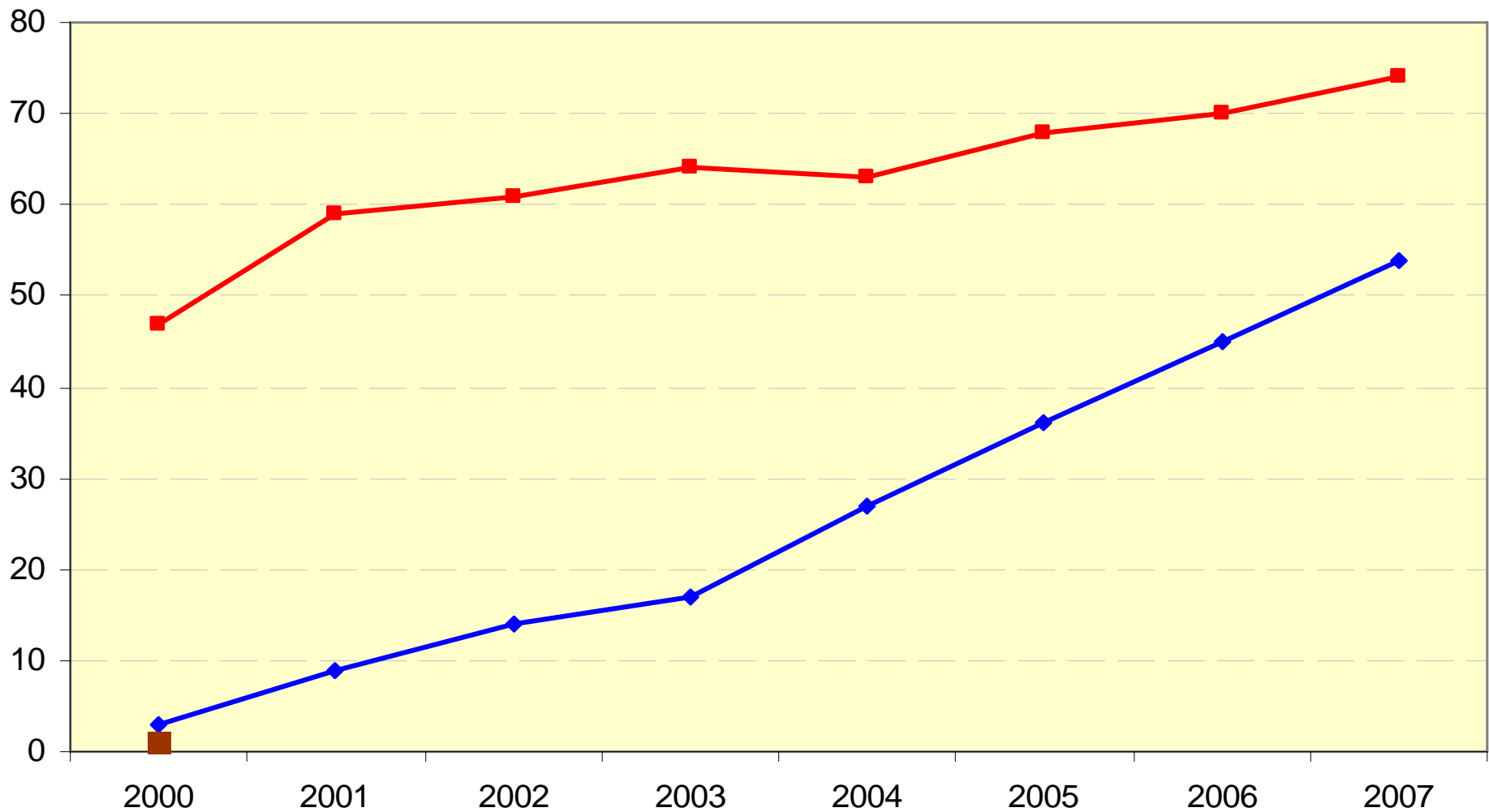
John B. Horrigan

Associate Director for Research

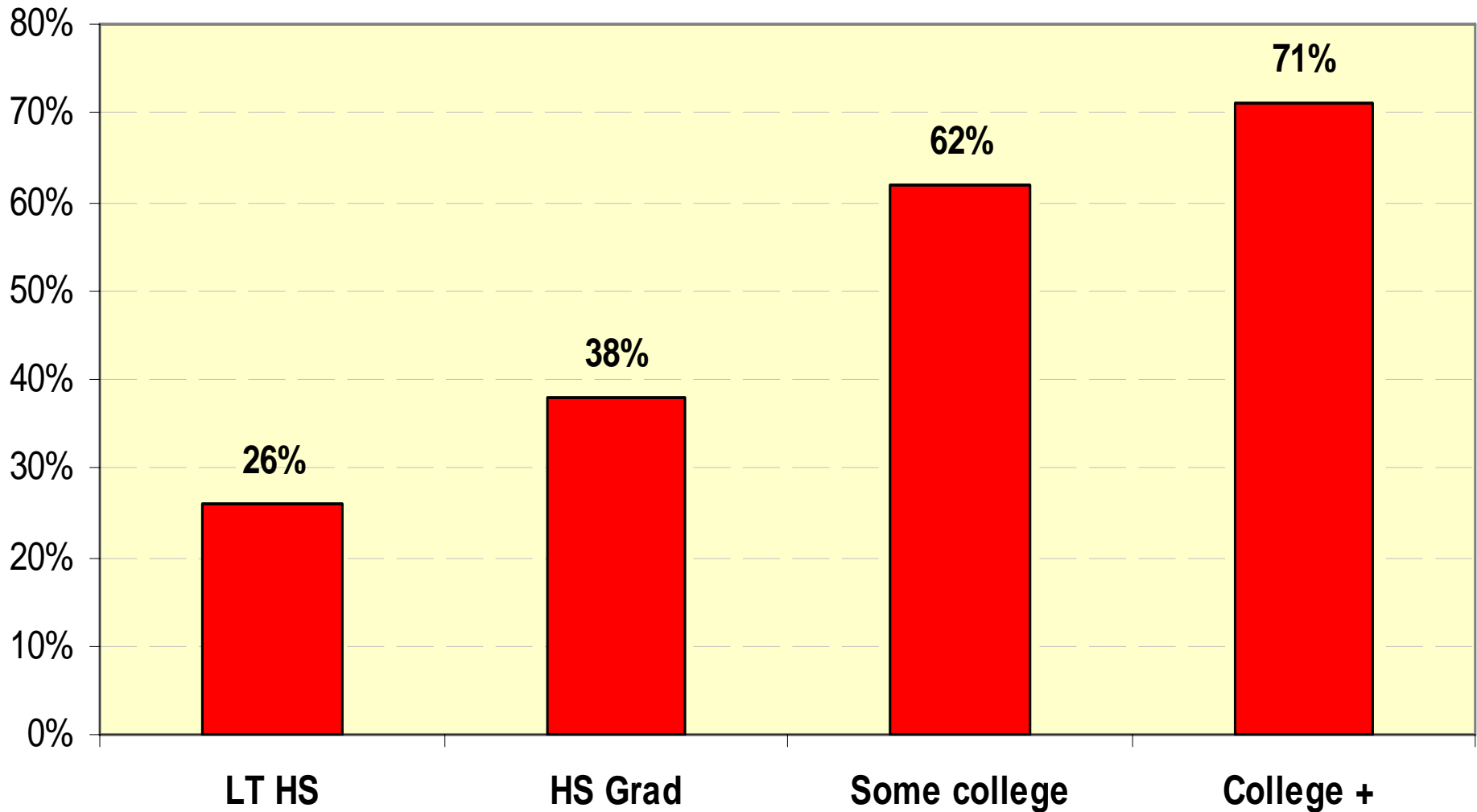
Overview

- Review trends in internet and broadband adoption
- Talk about what it means to be online
 - What people do with a broadband connection
 - Examine evolution of usage patterns
- Talk about what it means **not** to be online
- Implications of evolving user behavior as the internet becomes faster & more mobile

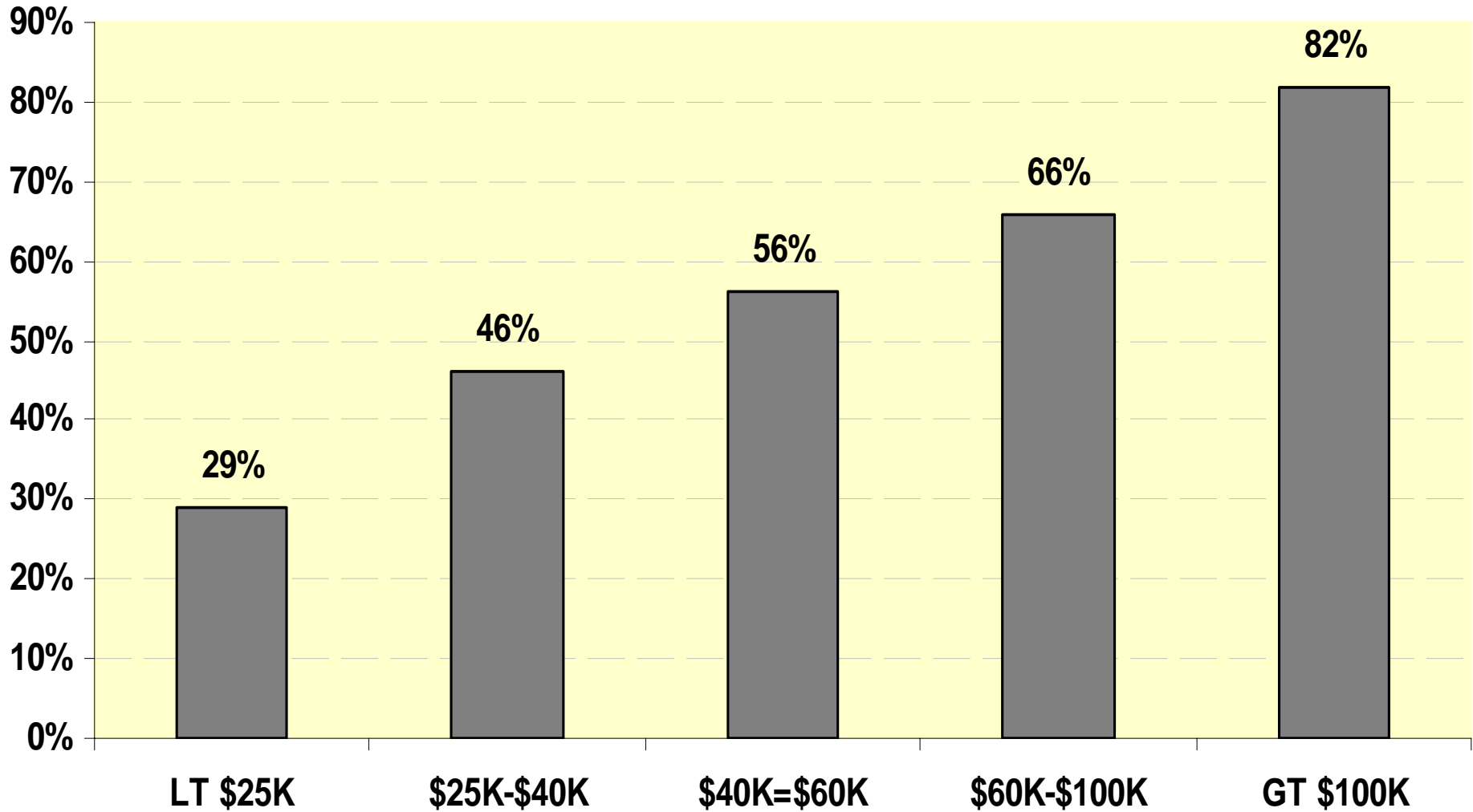
Internet and home broadband adoption: 2000 through 2007



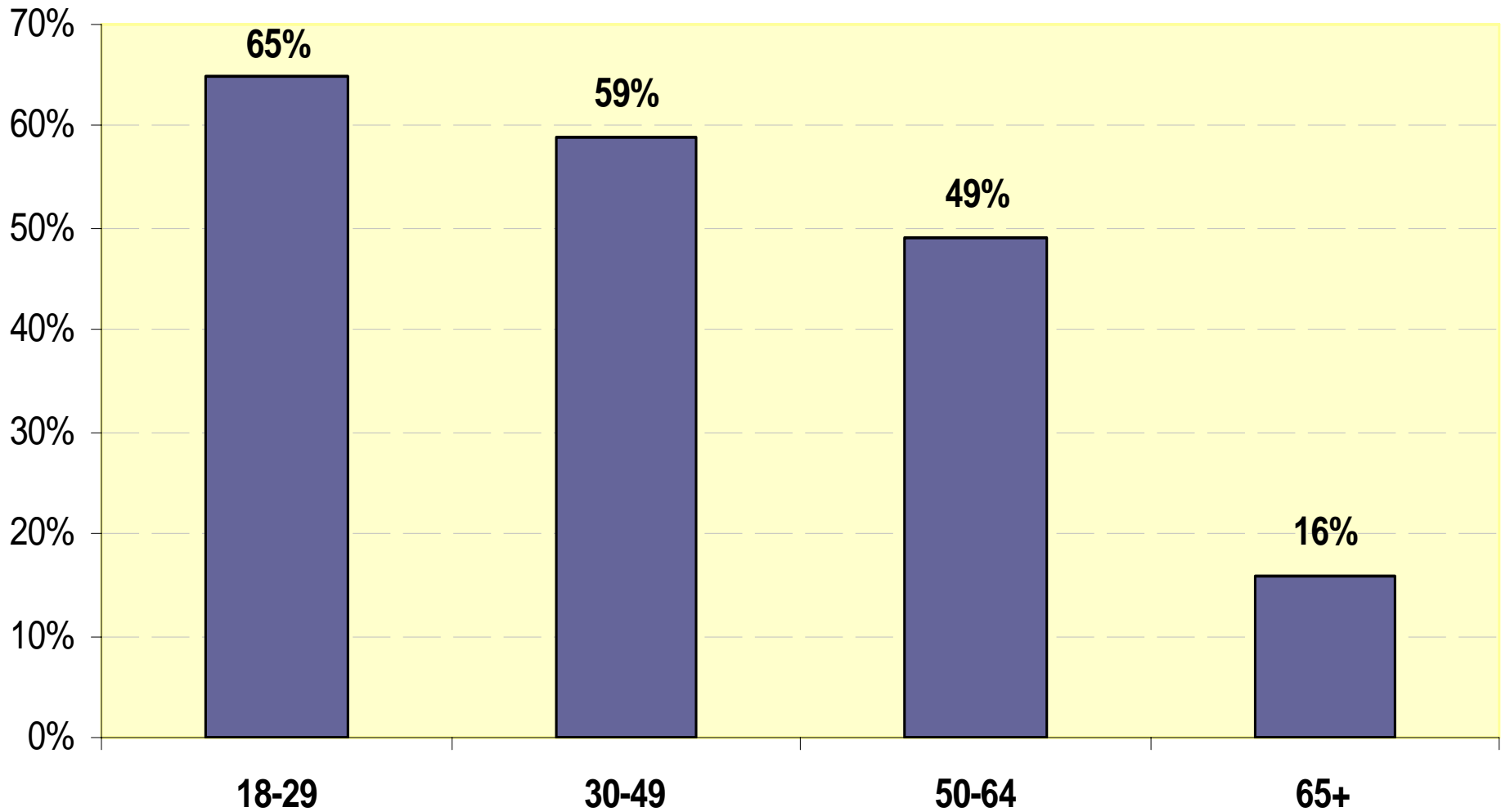
EDUCATION: Percent in each group with broadband at home (Sept 2007 survey)



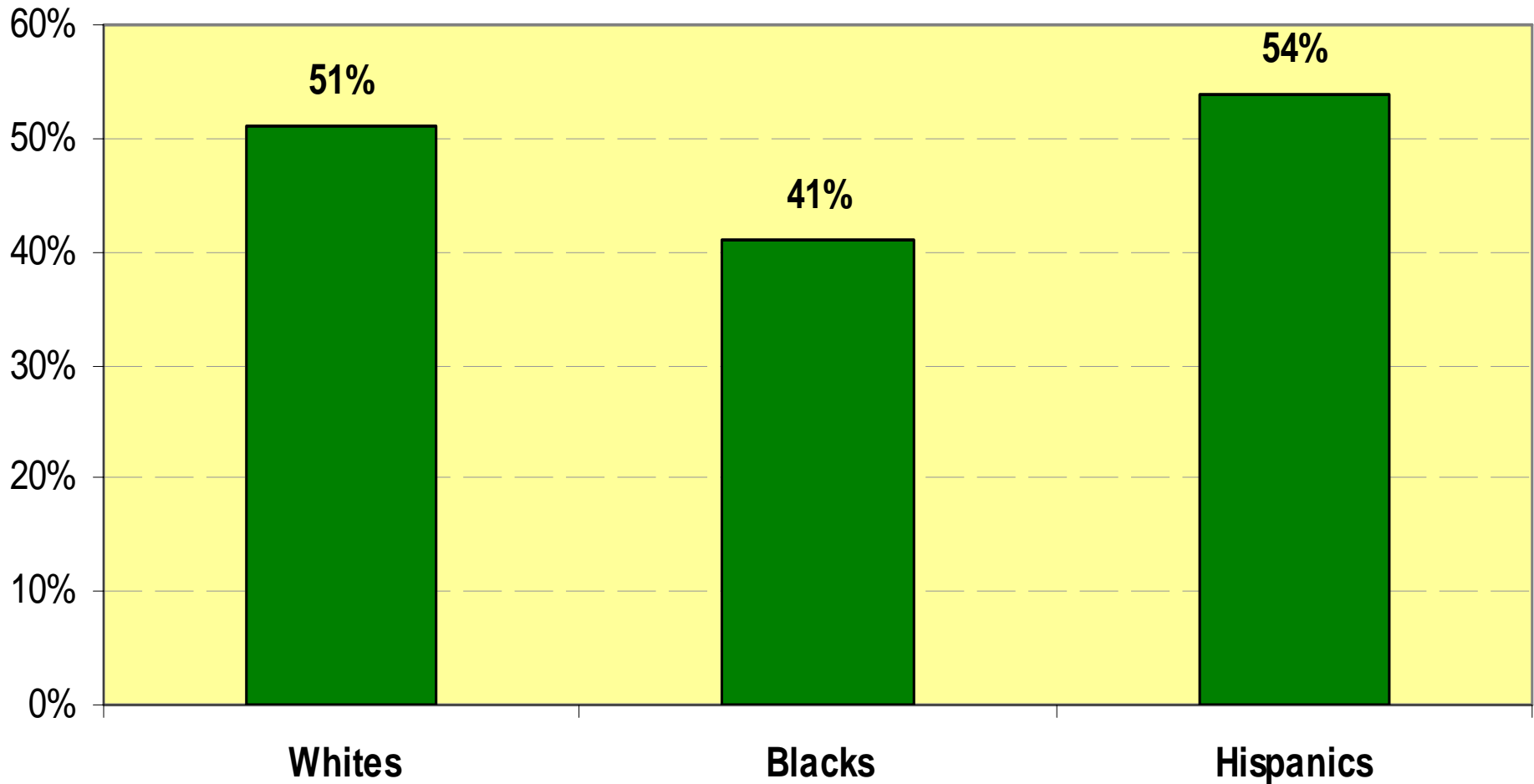
INCOME: Percent in each group with broadband at home (Sept 2007 survey)



AGE: Percent in each group with broadband at home (Sept 2007 survey)



Percent in each group with broadband at home (Sept. 2007 survey)





What it means to be online

- Many-to-many communication
 - Turn of the century killer app was email
- Many-to-many participation
 - Blogs and other user-generated content (c. 2004)



Health care and medical information online

- 54% of internet users had searched for some health or medical information online in 2000
- By 2006, across a range of 16 health activities queried, 80% of online users had searched for health or medical information online
 - Often times, searches on behalf of someone else
- “e-patients”, often using online support groups, take an active role in the management of their health care decisions



News

- Daily news consumption has risen from 22% of online users in 2000 to 37% in 2007
- Blog readership: about 10% of internet users read a blog on typical day
- News agenda of blogs and other online news sources differ from mainstream media.
- Users increasingly participate in coverage of news – and criticism of MSM

Science news and information

- 87% of online users have done some sort of query for science news & information
- The internet is the first place online users turn to when they need more information on a scientific issue
- The internet is a fact-checker for the scientifically inclined
- Scientists now use online video as a dissemination mechanism for research findings

Politics

- Each election cycle sees growth in share of people saying internet is a main source for political news
- Each election cycle sees a new tool that influences campaigns
 - Blogs in 2004
 - Video in 2006
 - In 2006, 8% of online users were active in managing user-generated political content, i.e., creating or forwarding video or blog posts
- Social networking sites, along with online video, central part of 2008 politics online story

Getting help about major life decisions

- 45% of internet users say online information plays an important or crucial role in major life decisions (e.g., health care, finance, job training & search, educational choices)
 - 34% say this helps come from other individuals they reach through the internet
 - 30% say they get information that helps them compare options
 - 28% get help from a professional or expert



Mobile access to data & information

- 62% of Americans have some experience with “on the go” access to digital data and information
- 58% have used a cell phone or PDA to access non-voice data applications such as:
 - Texting
 - Email
 - Recording Video
 - Accessing online information (maps, news)
- 41% have accessed the internet away from home or work, e.g., laptop connection to WiFi



The Big Shift

• Broadband → Always On access

• Mobile access → Always Present access

Cost of not being online

- ❖ It raises the costs to individuals of not having access in two ways:
 - Low access individuals don't have a chance to contribute to cyberspace
 - They don't have robust access to the user-generated content being posted by the very connected minority
- ❖ It imposes a cost on institutions who want to provide services over the internet
 - They can't easily get inputs from users on how best to meet their needs

A background image showing a white laptop and a pair of silver scissors, both slightly out of focus. The laptop is open and positioned diagonally across the top half of the frame. The scissors are placed horizontally across the middle of the frame, overlapping the laptop's keyboard area.

Barriers to use

- Security of personal information
- Usability
- Relevance of online content



Implications

- Education and training
- Application developers and cell phones
- Security