

# Digital Content & Users: Patterns & Impacts

OECD Workshop on  
“The Economic and Social Impacts of Broadband Communications”

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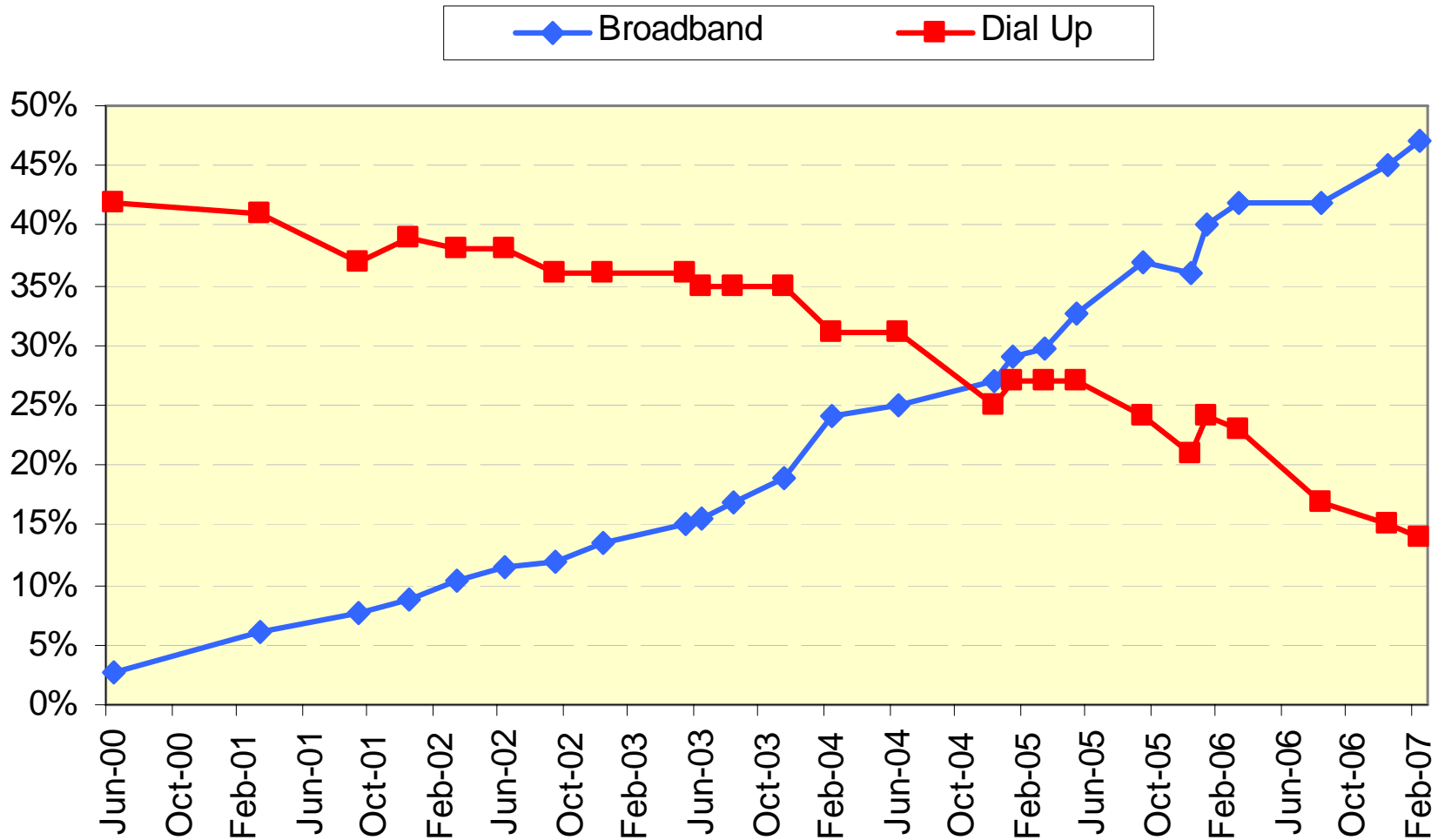
# Basic facts about communication technology adoption in the United States

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- 71% of American adults are internet users (Feb. '07)
- 93% of teens (ages 12 through 17) are online users (Nov. 2006)
- 70% of Americans who go online from home connect via high-speed (mostly cable modem or DSL)
  - That translates into 47% of all Americans with high-speed at home
- 34% of online users have used a wireless network to go online
- 74% of adults have cell phones
- 63% of teens (ages 12-17) have cell phones

# Broadband penetration in the U.S., 2000-2007

## Home Broadband & Dial-Up Penetration (% of adult Americans)



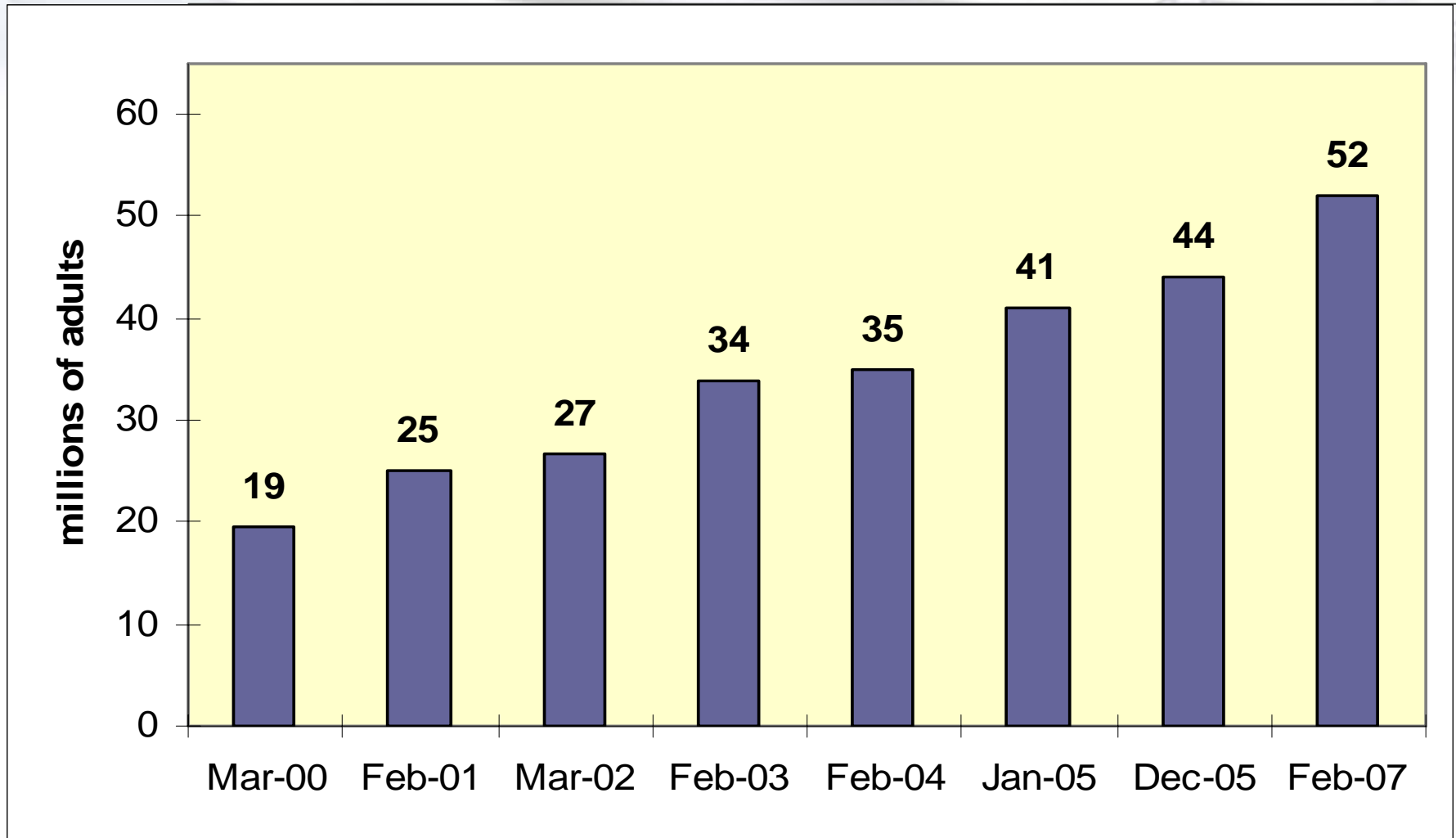


# Digital content & users

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- I. Compare broadband & dial-up users across 4 classes of digital information activities.
  - ✓ Consumption
  - ✓ Production
  - ✓ Decision-making
  - ✓ Play & entertainment
- II. Implications

# Getting news on the internet on the typical day (millions of users, typical day)



# General news consumption and the internet

(% getting news from source on typical day, December 2005)

	All	Dial-up (at home)	Broadband (at home)
Local TV	59%	65%	57
National TV	47	50	49
Radio	44	52	49
Local Paper	38	41	38
Internet	23	26	43
National Paper	12	12	17

# News about US campaign 2006 & the internet

(% in each group who got most of campaign news from specific source)

	All	Dial-up (at home)	Broadband (at home)
Television	69%	73%	63%
Newspapers	34	37	28
Internet	15	13	27
Radio	17	18	17
Magazines	2	1	2

# Where people get most of their science news and information (January 2006)

Source	All respondents	Home broadband	Under age 30 & broadband
Television	41%	33%	32
Internet	20	34	44
Magazines	14	15	9
Newspapers	14	11	3
Radio	4	4	1
Other	7	3	9

# Production: User-generated content (April 2006)

	All	Dial-Up	Broadband
Share a creation (e.g., photo, art)	19%	14%	24%
Post comments to a website	18	14	22
Maintain their own web page	12	8	16
Part of group blogs/web page	11	8	12
Remix digital content and re-post	9	7	11
Maintain their own blog	8	6	10
<b>% who have done at least 1 of 6</b>	<b>37</b>	<b>32</b>	<b>44</b>
<b>% who have done at least 2 of 6</b>	<b>19</b>	<b>13</b>	<b>24</b>

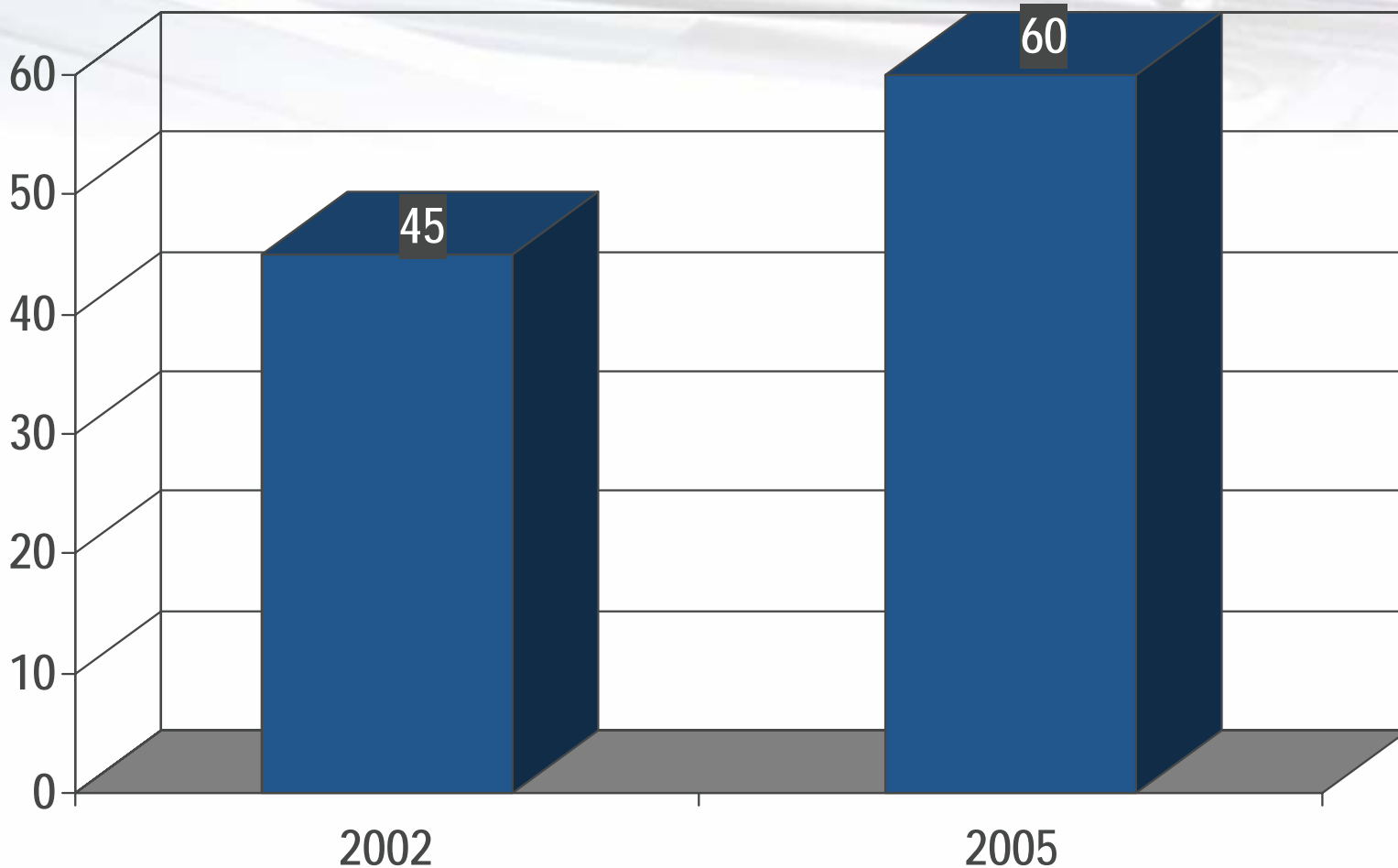
## Decision-making and online resources

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- Users asked about internet's role in eight types of decisions in 2002 and again in 2005:
  - Career training
  - Helping another with a major illness or medical condition
  - Choosing school (for self or child)
  - Bought a car
  - Made major investment/financial decision
  - Found a new place to live
  - Changed jobs
  - Dealt with one's own major illness or medical condition

# Growth from 2002 to 2005:

millions of Americans for whom internet played an important or crucial role in at least one decision



## For five specific decisions in 2005 survey

(buying car, investment/finance, career training, choosing a school, helping someone with illness)

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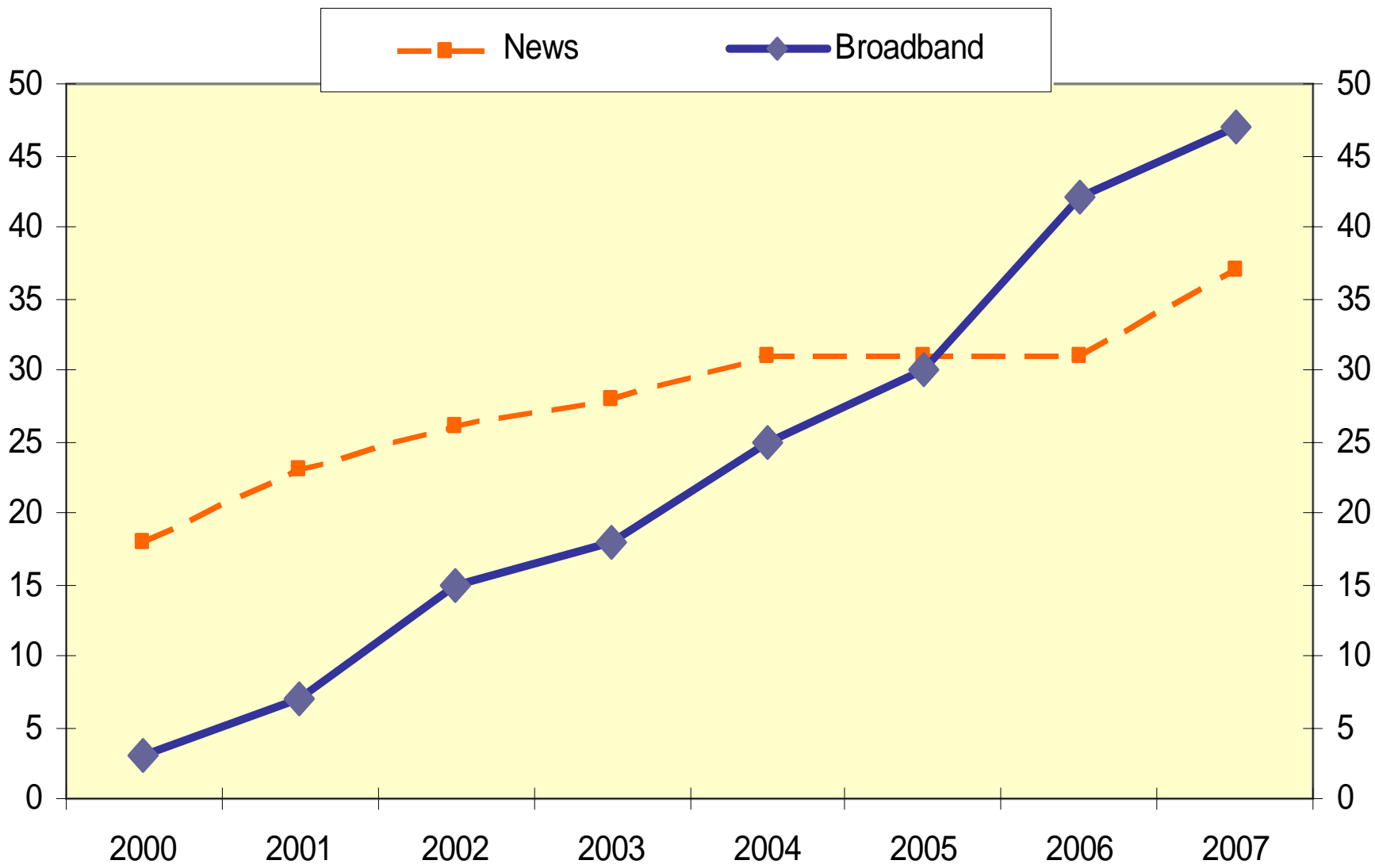
- ❖ Broadband users more likely to turn to internet for these decisions.
  - 52% to 33% over dial-up for at least one decision.
  - 23% to 12% over dial-up for at least two decisions.
- 34% say they got advice or support from other people
- 30% said it got them to information to help them compare options
- 28% said it helped them find professional or expert service

## Play and entertainment (April 2006)

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- 33% of home broadband users go online for fun or just to pass the time on the average day.
  - ❑ 19% of dial-up users do this on typical day
- 30% of home broadband users who play electronic video games do so with others online:
  - ❑ 15% of dial-up game players do this online.
- 23% of home broadband users have watched TV on a non-TV device (e.g., computer)
  - ❑ 9% of dial-up users have done this.
- 38% of home broadband users have listened to radio on a device other than a home/car radio.
  - ❑ 22% of dial-up users have done this.

## Trends in broadband adoption & daily online news



## Role of high-speed at home in growth trends

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- For growth in general online news consumption from 2002-2007:
  - 25% of growth can be attributed to rise in home broadband adoption
- For growth in reliance of internet for political news from 2002-2006:
  - About 30% of growth can be attributed to rise in home broadband adoption
- For growth in use of internet in important decisions (2002-2005):
  - Approximately 20% of growth can be attributed to rise in home broadband adoption

# What users bring to technology matters a lot: Pew Internet “ICT User Typology”

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- 31% are tech-oriented:
  - A small minority (8%) are deep users of cyberspace for participation and self-expression
  - Some (8%) use it, but don’t like connectivity
  - 15% into the communicative functions
- 20% are middle of the road:
  - 10% are oriented more to mobiles than online
  - 10% have lots of tech, but don’t like it
- Half (49%) of U.S. adults are light users of ICTs
  - Many (23%) like ICTs, but use it infrequently
  - 11% are use it, but are indifferent
  - 15% are “off the network”

## Implications from U.S. perspective

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- Far from the “mature phase” of ICT adoption.
- Gaps & frictions cut in different ways:
  - Many have more tech than they use
  - Some might do more with more technology and more experience
  - Many users will use ICTs only with lots of coaching & support.
  - Some are unlikely to embrace ICTs
- Payoffs to programs to introduce “low tech” users to ICT uses & applications