



Diversity & Civil Rights Workshop

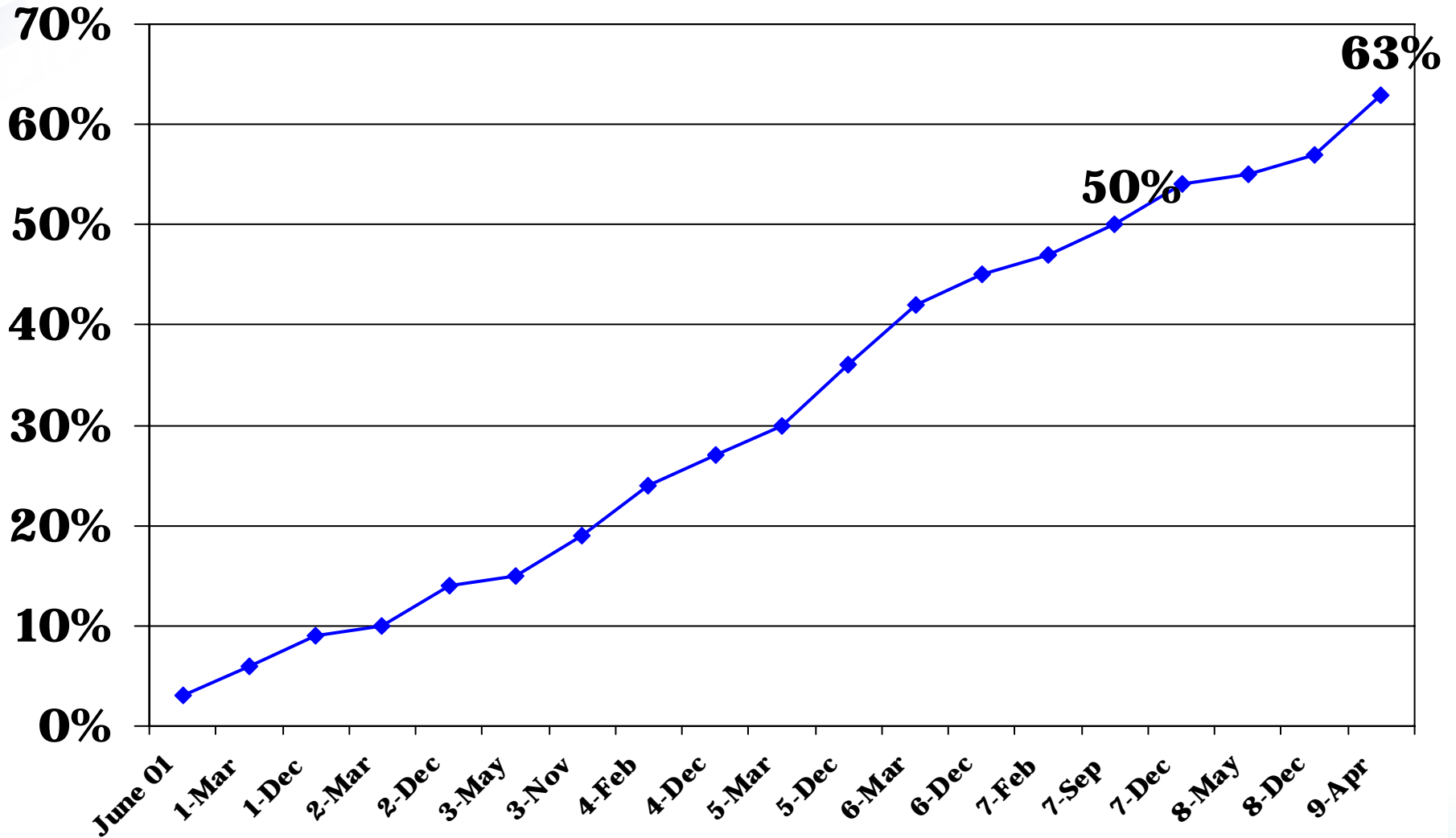
State of Broadband Adoption
John B. Horrigan

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Approximately two-thirds of American adults have adopted broadband at home

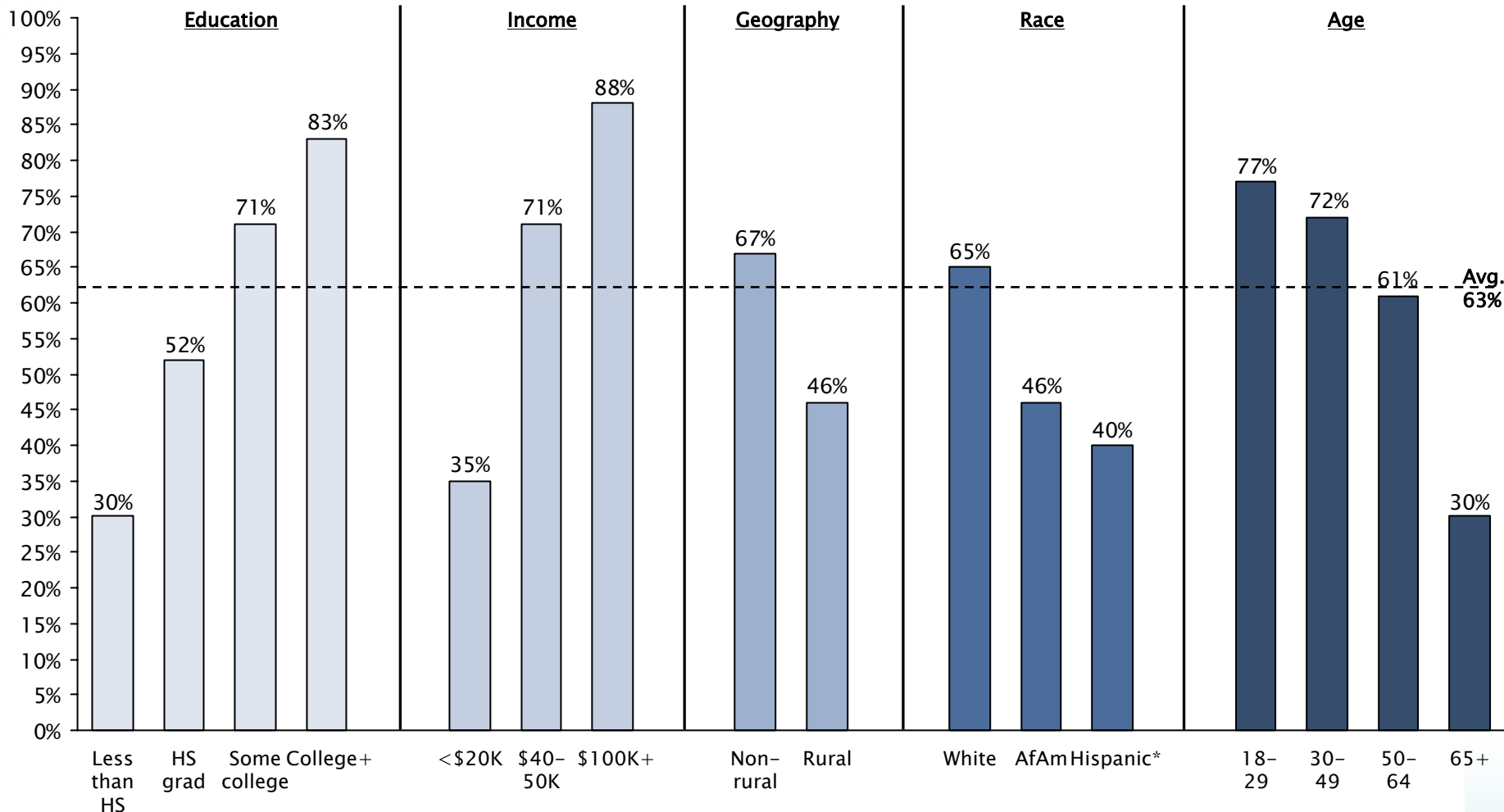
Broadband adoption	Year	Data source	Methodology
63%	2009	Pew Internet and American Life	Based on a phone survey of American households and adults
63%	2008	Forrester Research Group	Based on a mail survey of American and Canadian households and adults
64%	2009	Pike & Fischer	Based on subscriber counts from industry reported data
67%	2008	Nielsen	Based on Nielsen in-home media surveys of American households

Trends in home broadband adoption, 2000-2009



...however, adoption levels vary across demographic groups

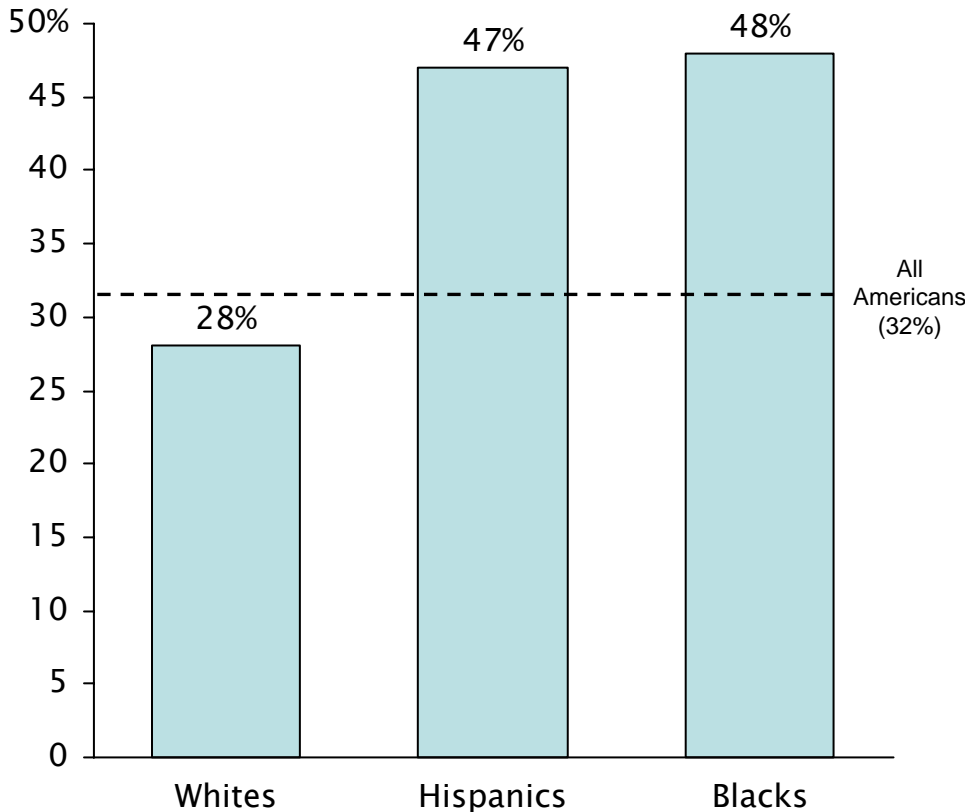
% of American Adults



*Hispanics includes both English and Spanish speaking Hispanics
 Source: Pew Internet & American Life Project, Home Broadband Adoption, June 2009

Mobile internet use: African Americans and Hispanics lead

Percent who have ever accessed the internet wirelessly with a handheld device

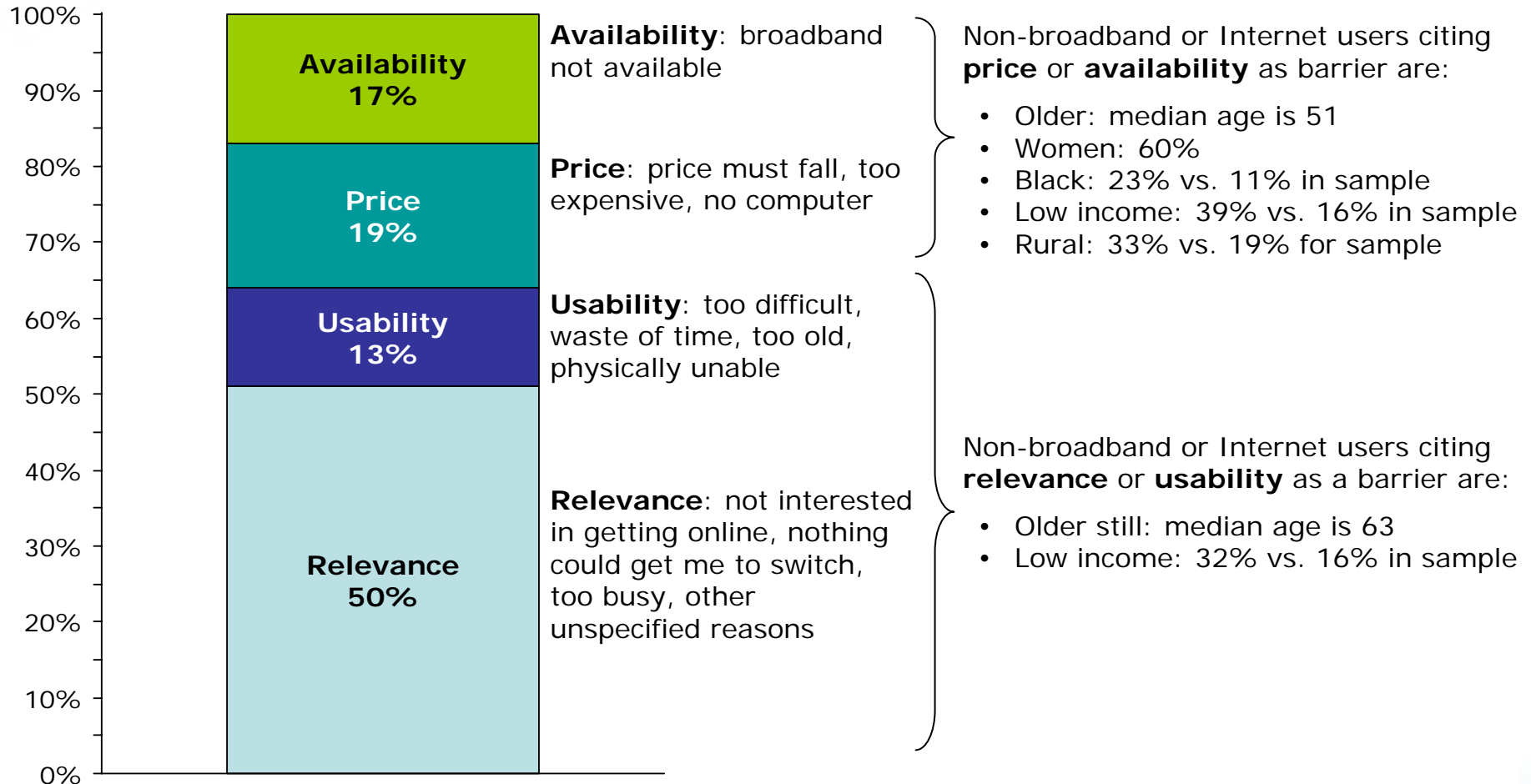


- 32% of all Americans have ever accessed the internet wirelessly with handheld device in 2009
- Up from 24% of all Americans who had done this in 2007
- Among African Americans:
 - 48% have used the mobile internet on handheld
- Among Hispanics (English-speaking):
 - 47% have used the mobile internet on handheld
- Among Whites:
 - 28% have used the mobile internet on handheld

Among non-adopters, lack of relevance cited as main reason for not having broadband at home

Broadband adoption levels

Percent of dial-up or non-Internet users



Cost of digital exclusion is large and growing

Market data

Implication for non-adopters

Employment

- In 2005, 77% of Fortune 500 Companies did not give jobseekers the option of responding offline to positions posted on the corporate careers website¹

- **Getting a job is more difficult** without access to online postings and the ability to submit applications online

Education

- ~65% of teens go online at home to complete Internet-related homework and 71% of teens say the Internet was their primary source for information for completing a recent school project²

- **Students without broadband connections lack access to the same level of information** as their connected peers

News

- 40% of Americans say they get most of their news from the Internet (more than those who cite newspapers); the Wall Street Journal is three inches narrower today than it was in

- Non-adopters have **increasingly limited resources to gather current events information**

Healthcare

- 80%³ of American adults have searched for health information online; of those 60% say the online information affected a decision about treating an illness or condition⁴

- Finding medical information without access to online health sources **limits patients' knowledge, choices and care**

Consumer welfare

- Study of car buyers showed that those who use online referral services and get price information online pay less than those who do not⁵

- Consumers who comparison shop in brick and mortar stores **pay more for goods & services** than those who comparison shop online

¹ See: <http://www.taleo.com/research/articles/talent/don-miss-the-next-strategic-turn-115.html>

² Natalie Carlson, National Survey Finds Kids Give High Marks to High Speed, Hispanic PR Wire (April 2007)

³ Pew Research Center for the People and the Press (December 2008); news releases (December 2005)

⁴ Pew Internet & American Life Project, The Social Life of Health Information (June 2009)

⁵ Scott Morton, Fiona M., Zettelmeyer, Florian and Silva-Risso, Jorge M., Internet Car Retailing (February 2001)