

Broadband Behaviour

Defining Everyday Broadband

iSociety, October 2003

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About iSociety



- 3-5 year ICT Research Project run by Research at The Work Foundation, and supported by Microsoft and PricewaterhouseCoopers
- Focus on technology in everyday life, pioneering ethnographic research in the UK
- Current research on mobile use, broadband consumers, social software, eGovernment, and networks

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About The Work Foundation

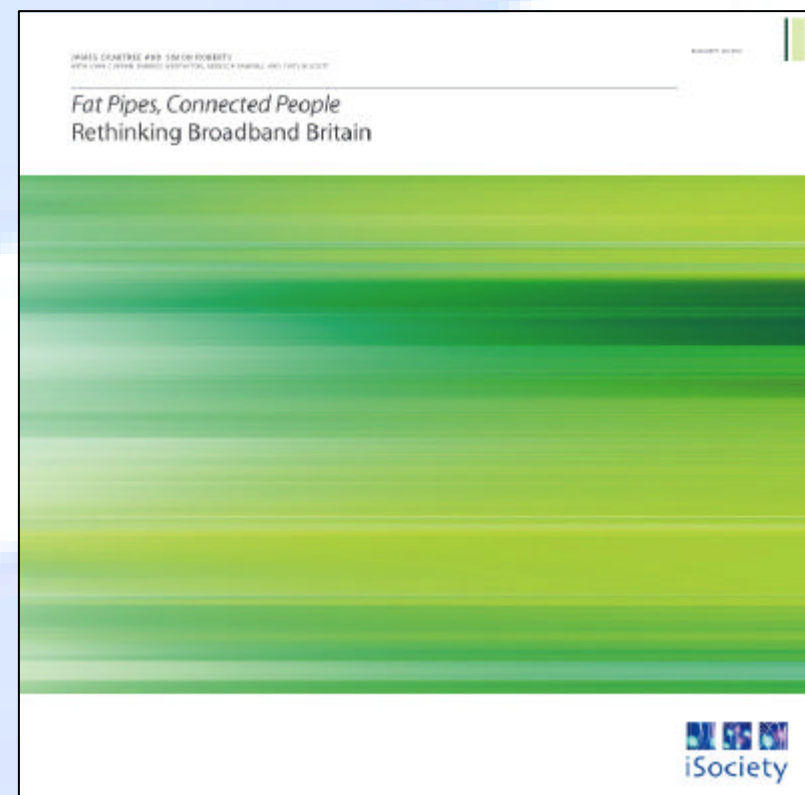


- The Work Foundation is an independent, not-for-profit think tank and consultancy
- Through research, campaigning and practical interventions, we aim to improve the productivity and the quality of working life in the UK.



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**“Imagine a Britain
with 20 million
broadband users.
Will it be different?
Will it be better?”**



This research



- Partnership between iSociety and the BSG
- Over a year's worth of research and thinking
- Building on last year's research
- A new report – *Fat Pipes, Connected People: Rethinking Broadband Britain* – Launched today
- This presentation gives an overview of last years research, the framework's developed for the report, and this year's findings

<<REWD
MyBroadband

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- Broadband Stakeholder Group Conference 2002
- Five Findings
 - 1. Broadband *microbarriers* matter
 - 2. Broadband is not *just* about speed
 - 3. Broadband is not *always* always on
 - 4. Broadband time is about *taking it easy*
 - 5. Broadband is *not enough* to change the experience of the internet
- Findings backed up by this year's research

FFWD>>

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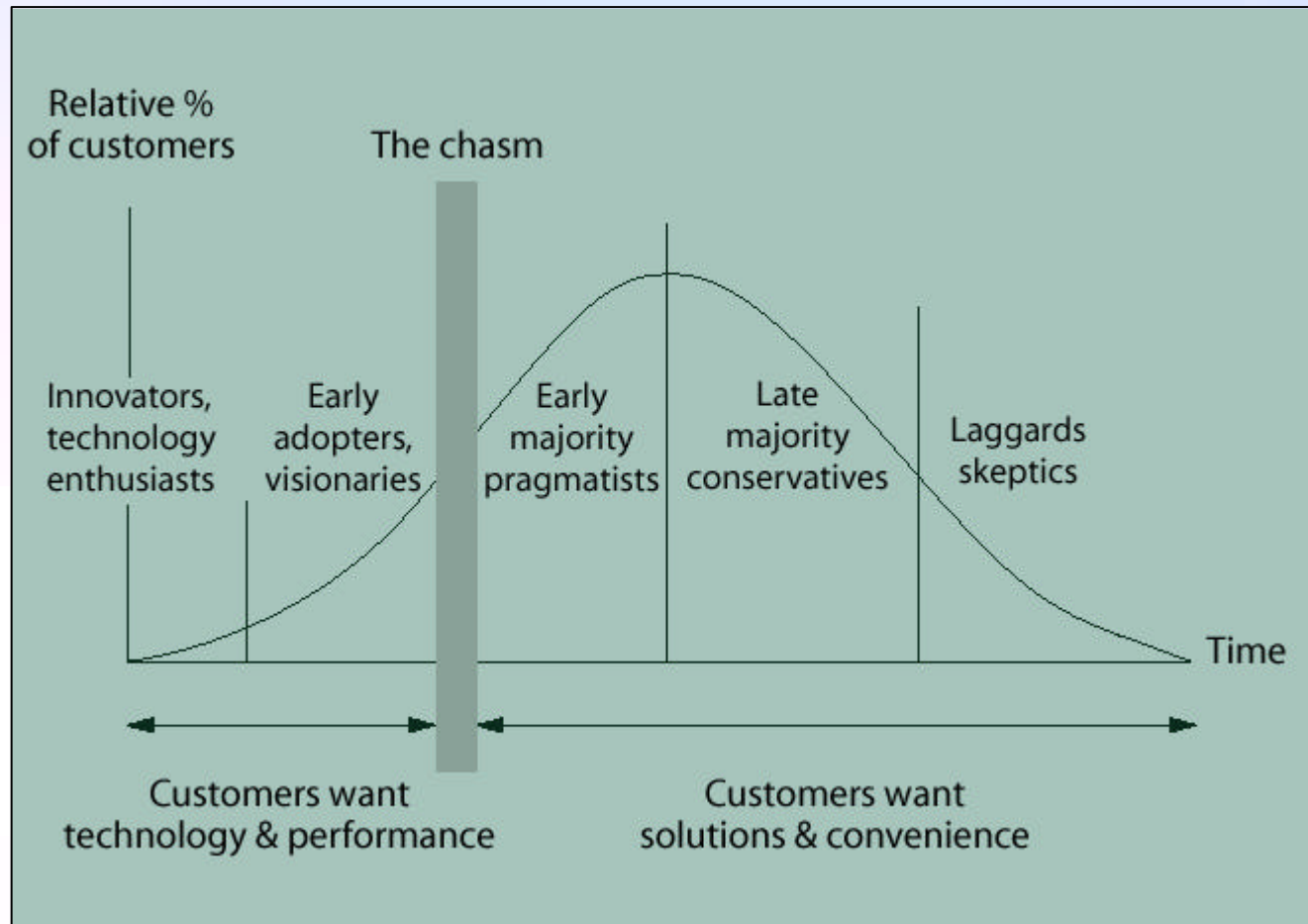
What's the Problem?

- Broadband Britain appears to be doing well
- But two significant problems remain
- 1. Crossing the **Broadband Chasm**
 - Adoption and availability up, but availability ? adoption
 - We must address the everyday market
- 2. Understanding **Broadband Behaviour**
 - What makes broadband behaviour different?
 - Vital to build value and explain broadband to new groups

The Broadband Chasm

The point of greatest peril in the development of a high-tech market lies in making the transition from an *early market* dominated by a few *visionary* customers to a *mainstream market* dominated by a large block of customers who are predominantly *pragmatists* in orientation. The gap [is] a *chasm*, and **crossing this chasm** must be the primary focus – **Geoffrey Moore**

The Broadband Chasm



Broadband Behaviour

Broadband doesn't matter at all if it has no impact on behaviour. Indeed, the premise of the broadband industry is the fact that broadband behaviour is different behaviour
– **Fat Pipes, Connected People**

Broadband Behaviour



- Adoption is the end of the beginning, not the beginning of the end
- Yet we lack a full understanding of:
 1. How people find new things to do online
 2. How Broadband helps them do this
 3. Why they keep doing them
 4. What services and support they really want
- To build value with existing customers, and explain the value proposition to new customers, we must understand what makes broadband behaviour different

BroadbandBehaviour



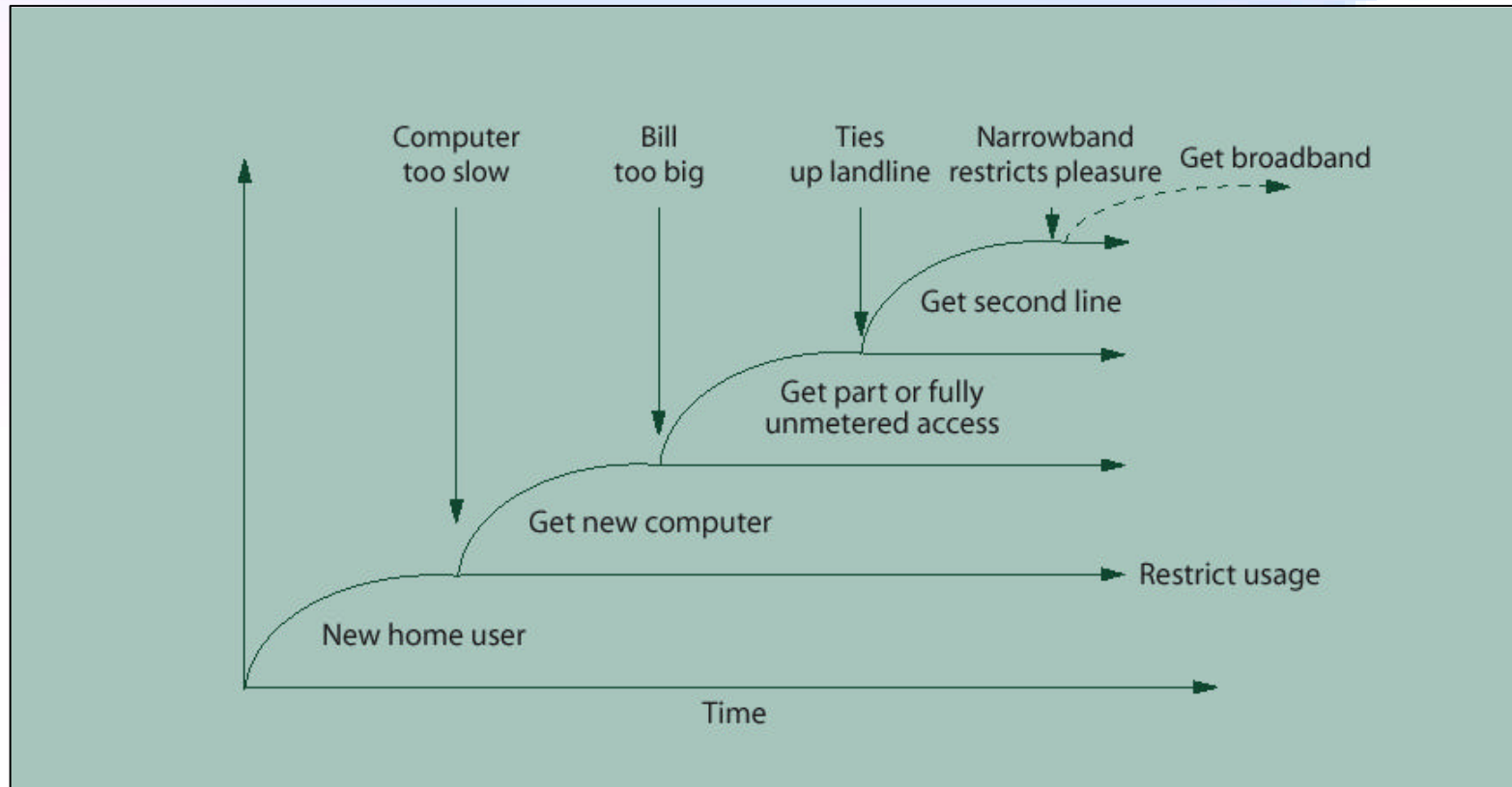
- Fresh research
 - Investigating everyday uses, and broadband behaviour
 - 6 new ethnographic case studies
- A model to think with
 - 1. Adoption
 - 2. Adaptation
 - 3. Absorption
- And a new report
 - *Fat Pipes, Connected People: Rethinking Broadband Britain*, bringing together both phases of research

1. Adoption

So, you think you might want to buy broadband?
What's stopping you?

- Broadband adoption is complicated
- Clustered Microbarriers to access matter
- A pre-adoption escalator often exists

Broadband Escalator

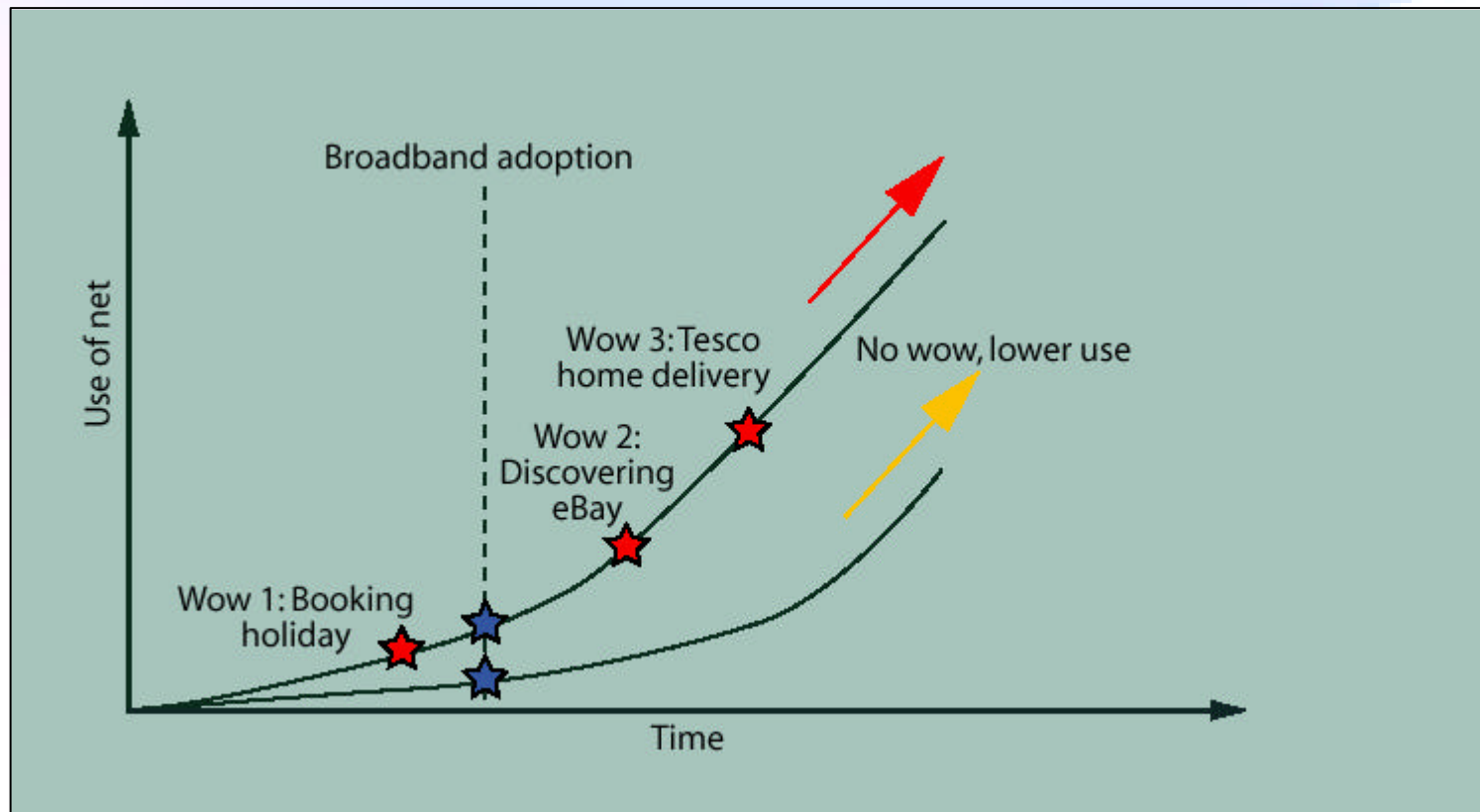


2. Adaptation

So, you bought broadband. Your internet access is faster and you don't have to dial up. Now what?

- A Post-Adoption Broadband Downturn
- 4 Ways of finding new things to do
 - 1. Self Discovery
 - 2. Rediscovery
 - 3. Directed Discovery
 - 4. Proxy Discovery
- Broadband is not enough to transform behaviour
- Wow Moments drive adaptation

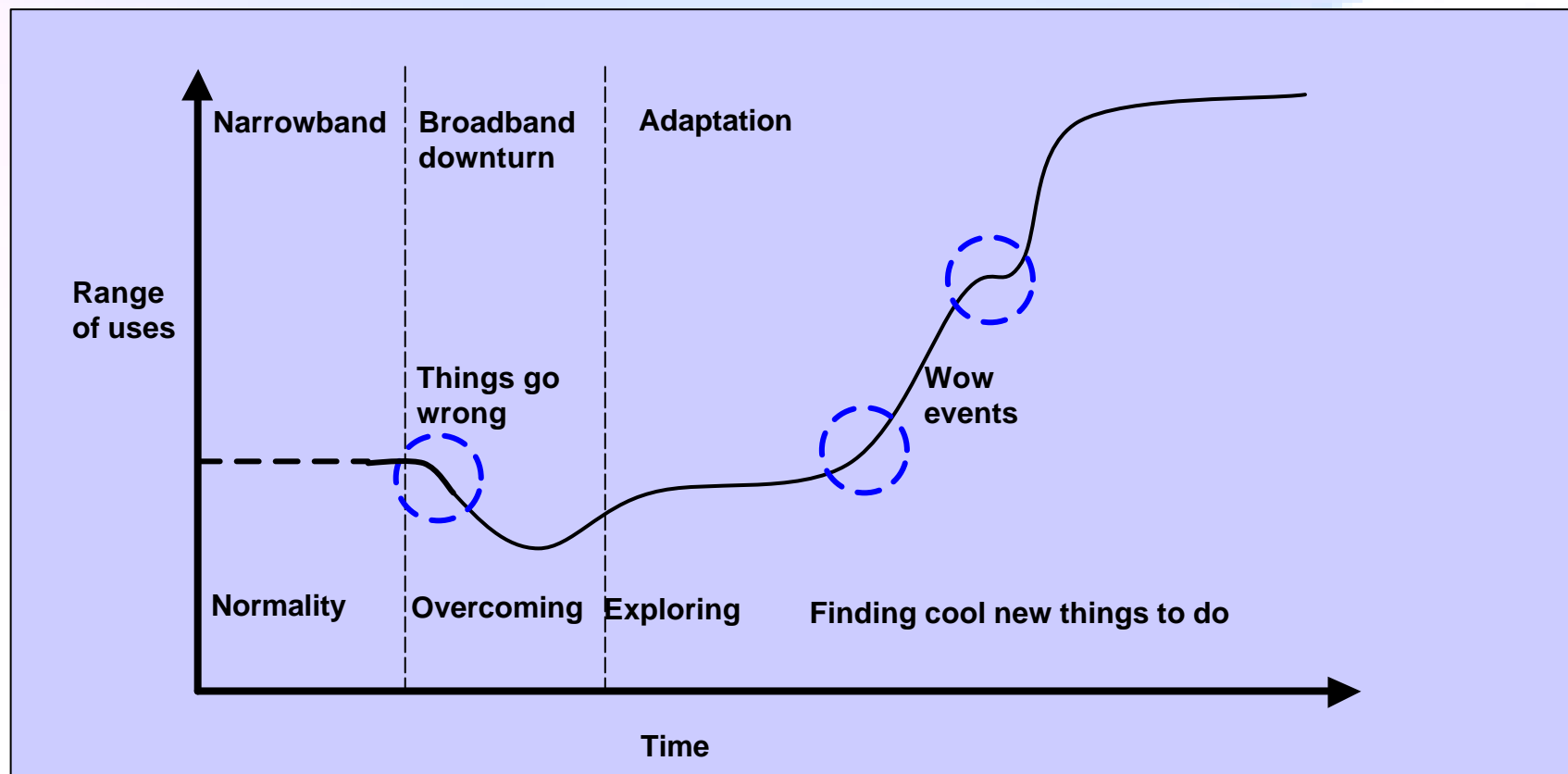
Wow Moments



3. Absorption

So, you have got broadband, and found some new cool things to do with it. What next?

- The final step in understanding broadband
- After having found something to do, users find ways of weaving this into their day-to-day lives
- Absorbed broadband becomes invisible, only noticeable by its absence
- Broadband itself becomes as remarkable as water out of the tap.....



So What Did We Find Out?

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The Research Process



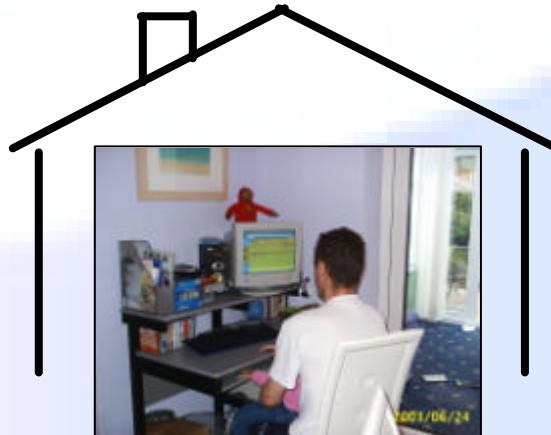
- Ethnographic encounters with six families
 - 6 Households in London and Manchester
 - Broadband internet for between 0-12 and 12+ months
 - Social Classes AB to C2
 - Lifestages - Pre-family, Young family, Older Family, Empty Nesters
- Observing, participating, talking and interviewing
- Media Use diaries

What is Ethnography?

“It's based on the idea that you can best absorb a culture by being there and doing it. An old professor of mine called it ‘deep hanging out**’”**

- Genevieve Bell, Intel Corp

The Families



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Five Findings

1. From “sometimes tasks” to “seamless activities”
2. Multitasking is the broadband experience
3. Social broadband, not broadband content
4. Broadband has developed a darkside
5. Support is the new priority

Seamless Activities and Multitasking are the defining characteristics of broadband use
Social broadband is one way of understanding this use
The darkside is a growing problem
Support is the way to solve this problem

Time Based Tasks to Seamless Activities

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Broadband Tasks



Broadband Tasks and Activities



- Tasks
 - Hunting for products, looking for specific information, research
 - Achieving clear goals - booking tickets

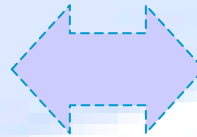
AND

- Activities
 - Downloading music and films
 - Cbeebies with your daughter
 - Spending time on the internet
 - Playing on eBay as a family

Tasks vs. Activities

Time-based Tasks

- ‘Research’, information, homework
- Internet as Yellow Pages
- Going to the PC



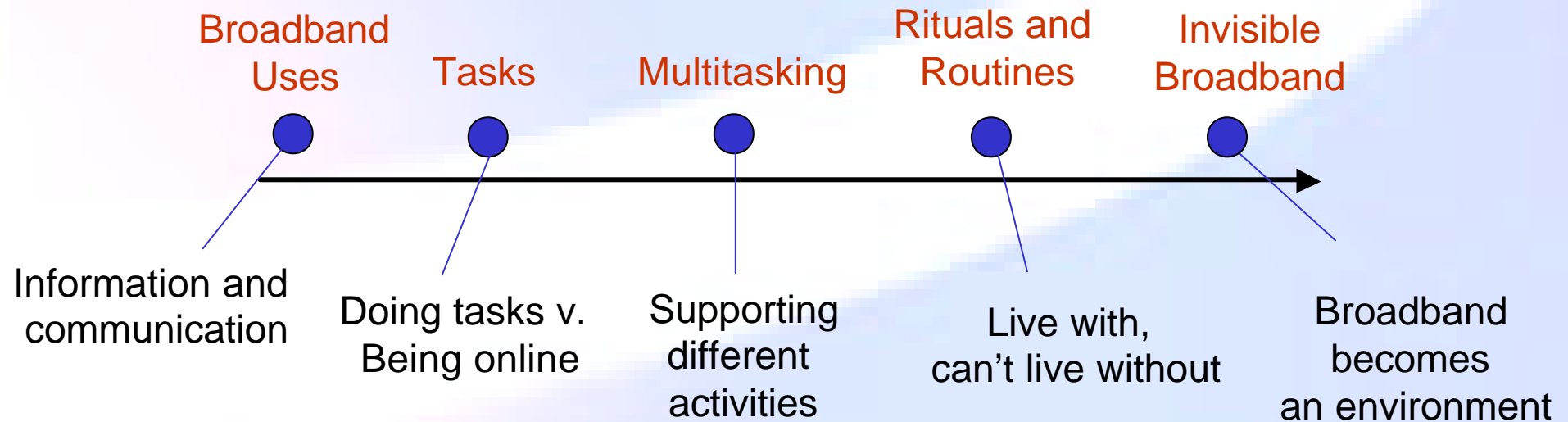
Seamless Activities

- Household glue
- PC as part of media environment
- Internet grazing

When the Lindens had carpet beetles, and when they found out that their son had autism Sue used the internet to find out more information. This family's internet use is event driven, a discrete activity, based in their son's room

During the evening Helen and Leon take it in turns on the PC, alternating between Coronation St, AOL IM, email, internet research and activities like organising a trip to a friend's wedding in France the following week

Tasks vs Activities



The Broadband Environment



- Seamless Activities
 - People start to think less of discrete tasks
 - And more about activities
- Always there activities
 - Grazing from an 'always there' resource
 - Broadband becomes an environment

*I totally take for granted the ability to check out websites/do research, whilst writing a document or email and also being able to use the phone. If I had to take one of the three out of the equation I'd be lost - **Helen***

Invisible Broadband



- Broadband becomes invisible
 - Micro: an invisible infrastructure on the PC
 - Macro: an invisible infrastructure in the household
- But not always invisible
 - Positive: new 'finds', novel uses, Wow moments
 - Negative: pop ups, viruses, Spam & technical hitches

Fish don't know of the existence of water until they are beached...

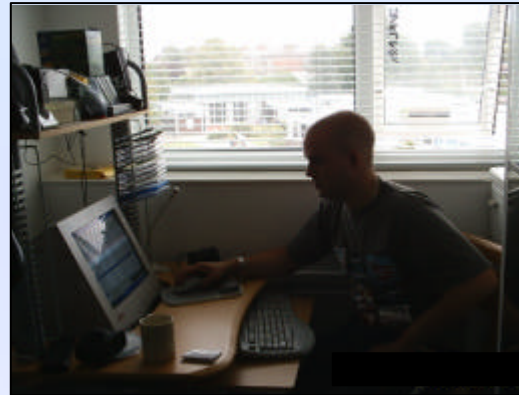
Marshall McLuhan

Broadband as Utility

- Broadband is taken for granted
 - A household infrastructure
 - Like the plumbing
 - Pervasive and relied upon
- Beyond technology
 - An enabler like electricity or water
 - That supports other activities, technologies, devices

When you open the fridge you only see the food and what you are going to eat

Our Families



Jones

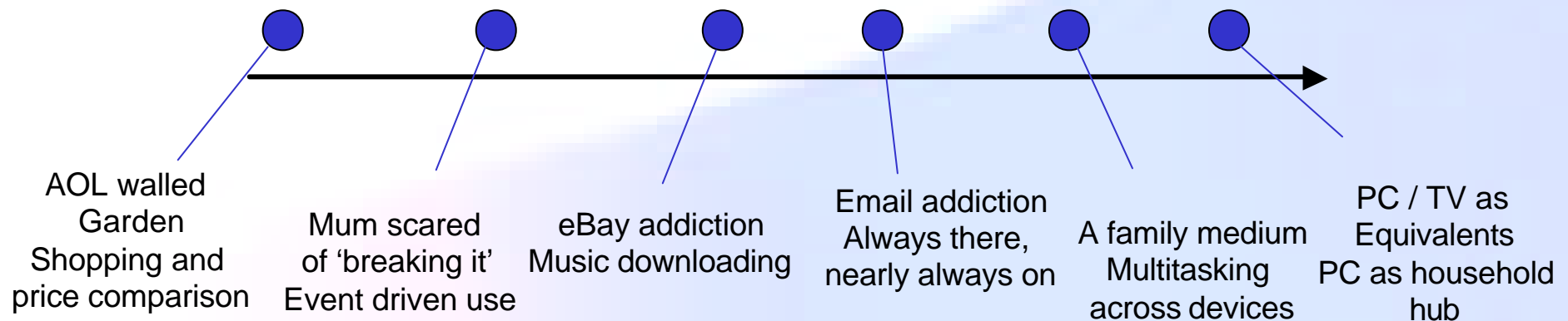
Lindens

Garrets

Helen & Leon

Spencers

Russells



Multitasking is the Broadband Experience

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Multitasking

- **Multi (media) tasking**
 - On PC, phone, email, internet, TV
 - Simultaneous tasks and activities
 - *“The beauty of broadband is doing one thing and then making a phone call; it’s always been the way I work – I’m doing one thing and then I can do another thing”*, Helen

Multi (media) Tasking

Helen

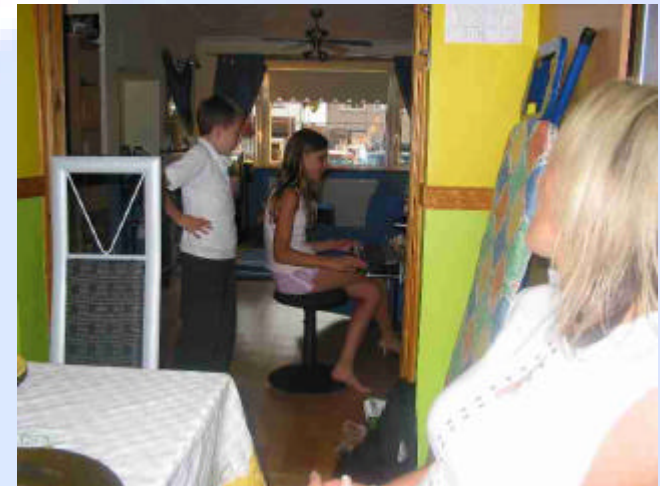
7.30pm: Researched stylists on internet, whilst watching Eastenders. Doing database for fashion designer client

11.15pm: Emailed friend in New Zealand. Brought her up to date on life, two weddings of friends

Midnight: Leon came home, did email and a bit of IM, then researched music rights information...he emailed French music rights people while I cooked a late dinner of Spaghetti Bolognese

Multitasking

- **Multi (mode) tasking**
 - Broadband allows you to do other stuff around the house
 - *“Broadband is about more freedom – I can leave a page open until Alan gets home, he can download music, we can keep checking eBay to see if our bid has been successful, and we are free to wander away from the computer to play with Sophie”*



Multi (mode) Tasking

The Jones

After work 3pm: wrote a letter on the PC to a firm about a replacement part for my shower screen

6pm: Had tea. After tea phoned my nephew about a program on the PC I could not run. Played referee to children over turns on the PC

My son went on Playstation, my daughter did her homework. After tidying up my wife went to sort out bath time then came and watched TV. I went on the PC to sort out the program with the help of my nephew on the phone

8pm: Came off PC and helped to put children to bed.

Multitasking

- **Multi (person) tasking**
 - The household can multitask
 - Broadband becomes an infrastructure that supports different family members' activities
 - Or not, as this example illustrates...



Multi (person) Tasking

Jason is on the telephone sitting on the stairs in the hall talking to his girlfriend while Mary and Mark are having a glass of wine in this kitchen talking about their days work. Alice is checking her balance on the net when there is a shout from Jason –

“Fuck.....the phone has gone dead again....I wish her mum would stop fucking doing this”.

Mark and Mary asked Jason what the matter was and he explained:

“Every time I ring her up her mother goes upstairs to their computer and logs on which then cuts off the bloody phone line....Now I have to wait for the old bat to fucking log off”.

This is something that the Spencer family no longer has to endure.

Social Broadband

Not Broadband Content

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Social Broadband



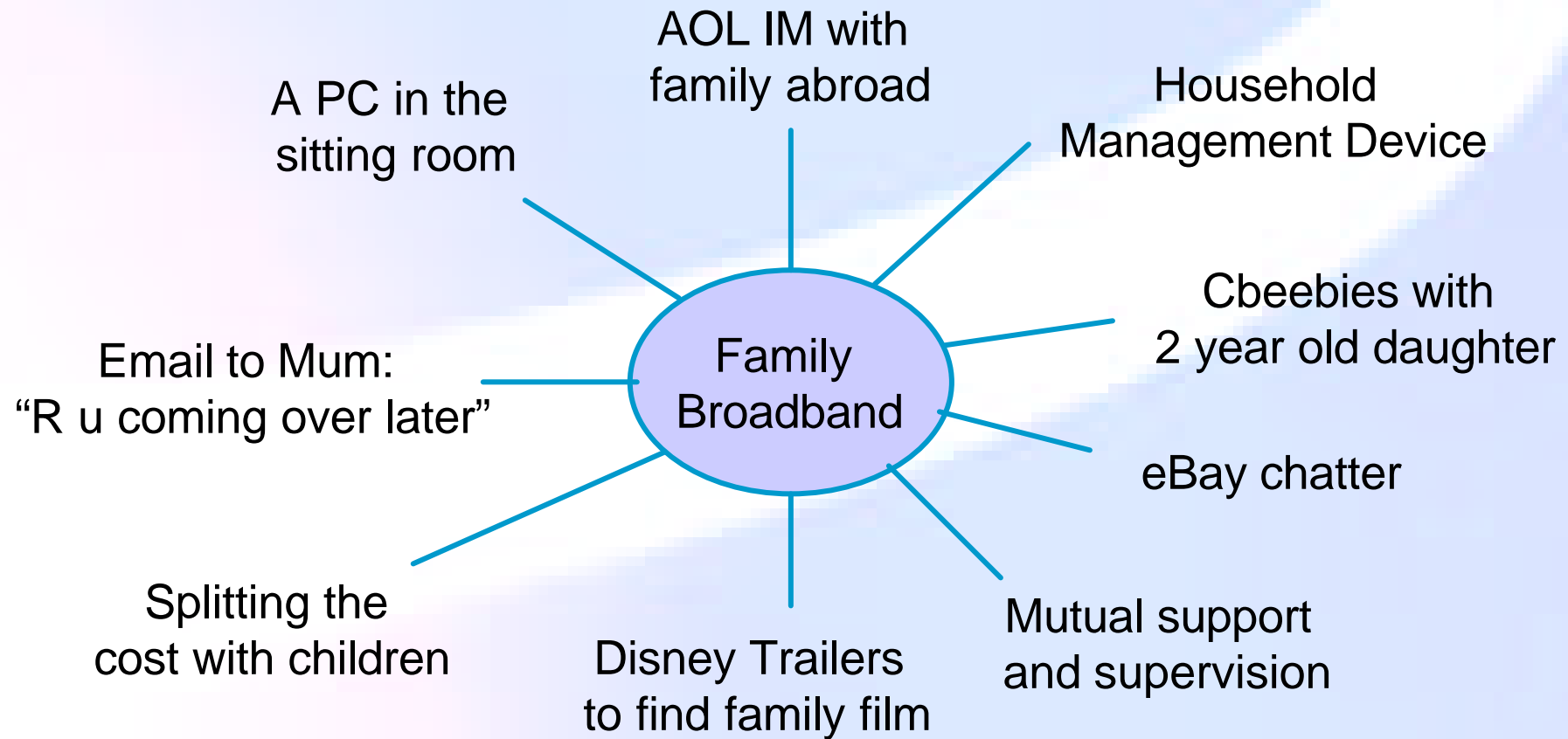
- How can we explain how some families get to
 - Seamless activities
 - Multitasking
- The Broadband industry has an individual view of broadband use, based around content consumption
- But a combination of seamless activities and multitasking families paints a different picture
- Broadband content neither drives use, nor seems a useful way of understanding why people adopt, adapt and absorb (yet)

Social Broadband



- Broadband helps people share things with their families, and across the network
- Broadband is useful because it allows content to be create and shared, not consumed
- Broadband time is social time: Broadband users spend less time surfing and e-mailing, and more time sharing content.

Family Broadband



Social eBay



- Offline / Online
 - From boot sales to auctioneering
- Family Entertainment
 - Constant source of conversation and excitement
 - Competition between family members
 - My father in law bought something for 1p, now I want to find two things for 1p
- Addictive Wow Moments
 - Internet trophies: China Dolls and rare music equipment
 - “A human bit of the internet”





Broadband has a **Darkside**

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The Darkside of Broadband



- Spam and spyware, porn and pop ups, viruses and worrying about the children threaten to turn good broadband experiences sour
- Spam in particular has become much worse during the year of our research
 - *Helen checks email and 4 of 9 are Spam, an hour later 24 of 24 are Spam*
- Broadband is often connected with this darkside... it's arrival is held responsible

Blaming Broadband (Suppliers)

"It's not something you have to worry about so much if you don't have broadband but I think broadband suppliers should provide Firewall software as part of the package – I'd pay extra for it....they should warn people about the need for firewalls because most people who are new to broadband are not aware of the need for them", Alan

Disaster at the Desktop?

- Stopping Pop-Ups
 - “Yes, I’d go mad without it
Popup stopper...I’d have to
kill myself otherwise....when
I’m trying to work”
- Safeguarding Children
 - “What I do is log on to her
(Claire’s) AOL email
account at work and delete
all the Viagra Spam stuff
and all the porn stuff.....She
does not seem to mind”
 - “Dad say’s that he’ll chop
my hands off if I go into a
chat room”





Support Is The New Priority

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Who to turn to for support?



- Home Users
 - Out of the office broadband users can be out of water
 - Unaware of how to fix problems
 - And prevent them occurring
- Who to talk to...?
 - Is BT, my ISP, my PC manufacturer, Microsoft, me or someone else to blame
 - Helplessness leads to real frustration

Providing “rich support”



- Users get stuck with broadband
- They need three types of support
 - 1. **Post adoption** – support to overcome the downturn
 - 2. **Anti-Darkside** – support to work out how to cope
 - 3. **Adaptation** - support to find new things to do
- Rich support, not rich content is the key
- Value will be created for companies by helping their users move from “sometimes tasks” to “seamless activities”, and absorb broadband

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- Five Findings
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TheEnd

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