The emerging information landscape

The 8 realities of the “new normal”

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we need a tshirt, "I survived the keynote disaster of 09"

it's awesome in the "I don't want to turn away from the accident because I might see a severed head" way

too bad they took my utensils away w/my plate. I could have jammed the butter knife into my temple.
New normal – circa 1999

- Non-internet user, and users were ...
- Male
- White
- College educated
- Dial-up at 32/kbits
- Email
- Directory and portal search
- Chat rooms
- Napster
- TiVo
Digital Revolution 1
Internet (80%) and Broadband at home (66%)
Networked creators are everywhere (two-thirds of adults; three-quarters of teens)

- 66% of int. users are social networking site users
- 55% share photos
- 37% contribute rankings and ratings
- 33% create content tags
- 30% share personal creations
- 26% post comments on sites and blogs
- 15% have personal website
- 15% are content remixers
- 14% are bloggers
- 13% use Twitter
- 6% location services – 9% allow location awareness from social media – 23% maps etc.
<table>
<thead>
<tr>
<th>Device Type</th>
<th>Percentage Owned by Adults</th>
<th>Increase Since</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laptops</td>
<td>56%</td>
<td>26%</td>
<td>2006</td>
</tr>
<tr>
<td>DVRs</td>
<td>52%</td>
<td>49%</td>
<td>2002</td>
</tr>
<tr>
<td>MP3 players</td>
<td>44%</td>
<td>33%</td>
<td>2005</td>
</tr>
<tr>
<td>Game consoles</td>
<td>42%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-book readers - Kindle</td>
<td>19%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tablet computer - iPad</td>
<td>19%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Digital Revolution 2
Mobile – 87%

**Mobile Subscriber Connections in America**

*Estimated number of mobile subscribers (millions)*

<table>
<thead>
<tr>
<th>Year</th>
<th>Connections (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1985</td>
<td>0.3</td>
</tr>
<tr>
<td>1990</td>
<td></td>
</tr>
<tr>
<td>1995</td>
<td></td>
</tr>
<tr>
<td>2000</td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>302.9</td>
</tr>
</tbody>
</table>

**Total U.S. population:** 315.5 million

Source: CTIA
4X% of adults/2X% of teens own “smartphones”
Apps – 50% of adults

<table>
<thead>
<tr>
<th></th>
<th>Sept 2009</th>
<th>May 2010</th>
<th>August 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download apps to their phone</td>
<td>22%</td>
<td>29*</td>
<td>38*</td>
</tr>
<tr>
<td>Have preloaded apps on their phone</td>
<td>38</td>
<td>43*</td>
<td>50*</td>
</tr>
<tr>
<td>Total who have apps on phone</td>
<td>43</td>
<td>43</td>
<td>50*</td>
</tr>
</tbody>
</table>

Download apps to their phone: 22% in Sept 2009, 29% in May 2010, 38% in August 2011.
Have preloaded apps on their phone: 38% in September 2009, 43% in May 2010, 50% in August 2011.
Total who have apps on phone: 43% in September 2009, 43% in May 2010, 50% in August 2011.
Digital Revolution 3
Social networking – 50% of all adults

% of internet users

- 18-29
- 30-49
- 50-64
- 65+

2005 2006 2007 2008 2009 2010 2011 2012
0% 1% 4% 7% 8% 11% 13% 25% 26% 33% 51% 70% 71% 83% 86% 85%

6% 8% 25% 48% 61% 70% 71% 52% 35%

7% 9% 49% 67% 76% 86% 85%
Mean size of Facebook friends network

- Millennials (18-34): 318.5
- Gen X (35-46): 197.6
- Younger Boomers (47-56): 155.7
- Older Boomers (57-65): 85.1
- Silent Generation (66-74): 78.4
- G.I. Generation (75+): 42.0
New normal – circa 2012

• Broadband
• Mobile
• Gender parity
• Race and ethnicity parity
• Less SES stratification
• Less generational variance
• Email
• Search
• Social networking and content creation
• Video on demand
Eight realities of the new normal for information users and providers
New Reality 1) The world is full of networked individuals using networked information

New Reality 2) The 4 V’s of information “physics” change

- **Volume**
- **Velocity**
- **Vibrance**
- **Valence / Relevance**
New Reality 3) People are shifting info platforms
New Reality 3) Corollary
People use multiple platforms

News platforms Americans use on typical day

<table>
<thead>
<tr>
<th>Platform</th>
<th>% of Adults (18+)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local TV</td>
<td>78</td>
</tr>
<tr>
<td>National network/cable</td>
<td>73</td>
</tr>
<tr>
<td>Online</td>
<td>61</td>
</tr>
<tr>
<td>Radio</td>
<td>54</td>
</tr>
<tr>
<td>Local newspaper</td>
<td>50</td>
</tr>
<tr>
<td>National newspaper</td>
<td>17</td>
</tr>
</tbody>
</table>
New Reality 3) Corollary
People blend platforms – 59% use online and offline

# of news platforms Americans use typical day

- 1 platform: 7%
- 2-3 platforms: 46%
- 4-6 platforms: 46%

% of adults (18+)
<table>
<thead>
<tr>
<th>Source</th>
<th>Top Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newspapers</td>
<td>- Top source for news on community events, crime, taxes, local government, arts and culture, social services, zoning and development</td>
</tr>
<tr>
<td></td>
<td>- Ties with internet as top source for news on housing, schools, and jobs</td>
</tr>
<tr>
<td></td>
<td>- Ties with TV as top source for local political news</td>
</tr>
<tr>
<td>Television</td>
<td>- Top source for weather and breaking news</td>
</tr>
<tr>
<td></td>
<td>- Ties with radio as top source for traffic news</td>
</tr>
<tr>
<td></td>
<td>- Ties with newspaper as top source for local political news</td>
</tr>
<tr>
<td>Internet</td>
<td>- Top source for information about restaurants and other local businesses</td>
</tr>
<tr>
<td></td>
<td>- Ties with newspaper as top source for news about housing, schools and jobs</td>
</tr>
<tr>
<td>Radio</td>
<td>- Ties with TV as top source for traffic news</td>
</tr>
</tbody>
</table>
New Reality 3) Corollary
People are not platform zealots
New Reality 3) People’s encounters with information change

Portable  Participatory

GlobalVoices
http://globalvoicesonline.org/
New Reality 3) People’s encounters with information change

Personal
New Reality 4) Influence is migrating from organizations to networks and new “experts”

Traditional experts with new platforms, esp. blogs

Amateur experts who are avid contributors – sometimes with tribes

New algorithmic authorities
New Reality 4) Corollary

Social networks are more influential and are differently segmented and layered

Sentries
New Reality 4) Corollary

Social networks are more influential and are differently segmented and layered

Evaluators
New Reality 4) Corollary

Social networks are more influential and are differently segmented and layered

Audience
New Reality 5) People’s attention zones have changed

• Continuous partial attention to media streams
• Immersion in deep dives
• Info-snacking in free moments
New reality 5) Corollary
People graze for info all day long
New Reality 6) Knowledge containers and displays are changing in the age of the “metaverse”
New Reality 7) New divides are emerging based on new tech literacies
New Reality 8) The future is uncertain

Your map is wrong!
New Reality 8) Corollaries

The architecture itself

Information policies

Social norms and attitudes
Therefore …

• ... confront the existential question: What’s our franchise?
• ... what’s our mobile play?
• ... what’s our social play (natural alliances)?
• ... prepare for disruptions …

... from “social” actors who aren’t looking for money or who don’t like current business models or credentials
... from new analysts in the world of “big data”
... from tech companies that see themselves as publishers/creators/curators
Thank you!