City of Seattle

Gregory J. Nickels, Mayor

Department of Information Technology
Bill Schrier, Director and Chief Technology Officer

Information Technology Access and Adoption in Seattle 2009 Executive Summary

Executive Summary – October 19, 2009

This report presents the findings of the City of Seattle's 2009 residential information technology survey. We found:

- Seattle is very connected;
- there are still significant gaps in access and use for some populations; and
- there are opportunities for greater use of social networking, mobile applications and online city services.

Surveys were last conducted in 2000 and 2004 and are based on our "Information Technology Indicators for a Healthy Community." For the first time, the survey was also conducted in Spanish and nine targeted focus groups were held to get input from immigrant/refugee groups and African Americans. Cell phone only households were not included in the telephone survey, but focus groups collected some data from cell-only users. We believe this is the most comprehensive research of Seattle's use of information technology ever conducted.

Highlights from findings

84% of households have home Internet access, and almost three-fourths of those with Internet have broadband service faster than dial up
Subscription to broadband Internet increased steeply, from 18% in 2000, to 42% in 2004, to 74% in 2009. These figures are well above the national average of 79% of adults with Internet access and 63% with high speed access. The number of families who have a telephone line at home and at least one cell phone increased from 70% to 86% in the past four years.

Seattle residents value high speed Internet services and want more
More than three-fourths of the computer users feel it would valuable to have significantly faster Internet service. The value of even faster speeds was highest among those who already have premium or business class Internet service, who are about 15% of those with Internet. However, even those that don't have high speed service recognize that it's very important.

Even in high tech Seattle, significant disparities continue in technology access and adoption
Income and education were the strongest predictors of technology access at home. Age, ethnicity, language spoken at home, employment status and disability status are also relevant.

People making under $30,000 are only two-thirds as likely to have home Internet as those with household income above $40,000. People with no college education are a third less likely to have home Internet service. Less than half (44.6%) of the Latino/Hispanic households and only about two-thirds (66.6%) of African Americans have Internet at home compared to almost 90% of Caucasians. Sixty-two percent (62%) of those with disabilities have Internet at home as compared to 87% of those without disabilities.

Affordability is an issue
When asked what one thing, if anything, would improve your Internet service the most, price was named first (47%) followed by speed (26.7%). Cost was cited as a significant barrier for those without computers or Internet at home.

Uses of the Internet are increasing, but, again disparities exist
Two-thirds have used sites such as Facebook, MySpace, or LinkedIn, with about 60% being quite comfortable using social networking sites. Eight of ten computer users have used the Internet to find health information, an increase of more than ten percentage points since 2004. Daily computer and email use increases with both education and income. Computer users with more income are more likely to have purchased products or services, found health or medical information, used social networking sites, or donated to charities online. Latinos and African Americans continue to show less computer experience and range of use. Those with the least income and least education have the least confidence in the security of online financial transactions.

Just over half of Seattle residents participate in a community group, less than in 2004, and two-thirds of these use community websites or e-mail lists
African Americans are more likely to participate in community groups, but not electronically. Latinos and especially Spanish speakers are much less likely to participate. Participation rises with income.

More people use the Internet for local purchasing, but this varies with education and ethnicity
More computer users (80%) have used the Internet in the past year to find information about local businesses, up nine percentage points from 2004. More than half (55%) or respondents have purchased goods or services from local businesses over the Internet in the past year. Caucasians are about twice as likely as African Americans to purchase from local businesses online. Residents told us that a central online directory for all Seattle businesses and having more local businesses come up on Internet searches would make it easier to find or purchase from local businesses on the Internet.

The Internet is saving residents gas and time and is reducing road congestion
About four in ten computer users said that the Internet saves them "a lot of driving." Two-thirds (66%) of the computer users who work at a paying job use the Internet to work from home.

More are accessing government online
The use of the Internet to obtain city, county, state, or federal government information rises with education and has increased for all education groups since 2004 except those with the least education.

Visitors to the City's web portal, Seattle.gov, have risen steeply from 56% in 2004 to 78% in 2009
People with disabilities, African American or Latino respondents, and seniors are less likely to use the website. Though still lower than other age groups, the percentage of seniors 65 and older visiting Seattle.gov has increased from 19% in 2000 to 24% in 2004 and is now up to 35% in 2009.

Over half of Seattle cable viewers (58%) have seen the Seattle Channel
Among the cable subscribers, no differences in viewing were found for different income levels or by employment status.

Confidence has grown in communicating opinions electronically to elected officials
Residents are growing in their belief that the Internet and email are effective ways to communicate opinions and there is a more positive assessment about using it to communicate with elected officials.

E-Government contact is preferred, but varies by ethnic group
The preference of residents to make contact with the government via the web or email, as determined in the telephone survey, rises as education or income increases. Caucasian and Asian/Pacific Islander respondents prefer electronic contact, while African-Americans and Latinos prefer telephone, written or in person contact.
Focus group participants indicated a need for more training in how to effectively reach government online and, for some, how to find multilingual help. Focus group participants most often chose "On the web or email." This was a very strong peference for cell-phone-only users and not as true for those with limited English skills. The focus groups confirmed great variation between groups. For instance, 67% of the Chinese and 66% of the African-American focus groups preferred web or email, versus 27% of the older Filipino group. They offered a number of suggestions about how to help increase use of e-government.

People want to participate with government, but they don't always know what civic engagement means or how to do it effectively
Focus group participants expressed a desire to be able to easily find or subscribe to information tailored to their needs, community, and interests. Those with limited English want content in a language they can understand or in pictures or videos so that language is not as important. They expressed a need for full services in their language, rather than just overviews of services.

Subscription to Cable TV has increased somewhat, from 65% in 2004 to 69% in 2009
Comcast has 89% of the Seattle market. Nearly half (45%) of non cable subscribers have subscribed in the past and about 40% of these dropped cable because of its cost. Unfortunately, those with relatively limited incomes who may need the lowest priced cable service the most, are less aware of the lower cost cable option; this included seniors 65 and older, people with household income below $40,000 per year, people with a disability, and those who were not working at a paying job.

Comcast subscribers are more satisfied with customer service while Broadstripe satisfaction dropped
Satisfaction with Broadstripe's customer service decreased from 80% "(very) satisfied" in 2004 to 48% in 2009.

Public access TV viewership is down, but still rated as important by more than 80%
Thirty-eight percent have seen the Seattle Community Access Network (SCAN) Channel 77, down from 49% in 2004. Latinos and African Americans who have seen SCAN tend to be more frequent viewers and rate it as more important. More than 80% (as many as in 2004) continue to think it is somewhat or very important for residents and community organizations to have public access television services.

Focus groups reveal less connected communities and lower skills among immigrants
Seattle's immigrant residents with limited English skills are less connected to the Internet or email, as revealed in focus groups with some of Seattle's larger communities of color and immigrant/refugee communities. Forty-four percent of the immigrant focus group participants assessed their computer skill as "none or not very skilled" and another 30% selected "know what I need to know."

Greater adoption among those with modest incomes would occur with low-cost options available for high speed Internet, training, purchasing computers, and maintaining them safely and securely
Focus group participants expressed that going to a place they know, in an environment and with trainers that relate to them culturally, will help encourage use. Concerns about viruses, spam, and scams are preventing some from becoming users or greater users. Parents expressed their concerns and frustrations with not being able to monitor their children's computer use because of not understanding either the language or various websites.