

SHINY NEW THINGS



What Digital Adopters Want, How to Reach Them,
and Why Every Marketer Should Pay Attention

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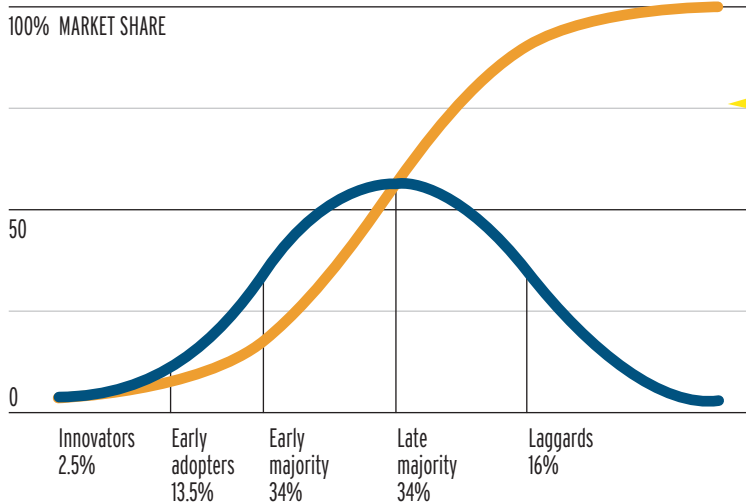
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CHART 1: EARLY ADOPTERS Everett Rogers' now-famous curve

Source: ChangeWave Research

Introduction

BY LAURA RICH laurarich2@yahoo.com

FROM ITS VERY beginnings, Google has relied on the early adopter—evident from its trademark “beta” stamp on new products. The company’s test-mode approach has generally endeared early adopters who sought to be included in a launch, while also providing cover for missteps and abandoned products. Until, that is, the company’s foray into telephony. Nexus One was rebuked by so many early adopters that Google moved quickly to cut its upgrade fee. And users of Google Voice owe a debt to early adopters, whose loud grumbling forced the company to improve service. But Google must be doing something right, because its mobile operating system, Android, has given Google a 21% share of the smartphone market, from less than zero at the beginning of 2009—putting it in serious competition with Apple, whose iPhone has 28% of the market.

The influence of early adopters over new products and the cultural embrace of new innovation are by now well known in the realm of market research. The behavior of these all-powerful individuals was first studied by social scientist Everett Rogers in 1962. At the time, Rogers sought to understand what drove farmers to adopt new products like hybrid corn seeds. What he found was that seeding products that gained the approval of early adopters went on to be accepted by an “early majority,”

then a “late majority,” then “laggards,” and eventually by all farmers, leading to bona fide market saturation.

Rogers’ model has endured. His book, “Diffusion of Innovations,” became the second-most-cited work of social scientists in the mid-2000s, in fact. And the early adopters studied by Rogers are every bit as key to the marketing cycle today as they were half a century ago, most notably when it comes to digital products.

Research firms such as ChangeWave boast 1,000-strong panels of early adopters, tapped for their attitudes on new products and concepts in an effort to predict market success. Metafacts, another research company, surveys 31,000 users of technology every year, unearthing data that reveals precisely who the early adopters are and what makes them tick. Everyone from Forrester Research to Gartner is exploring the market dynamics and psychology of early adopters.

That is great news for marketers, for whom Rogers’ curve now often spans a short period of time. With so many sources of data available, it’s fairly easy to root out early adopters.

However, as Dr. Taly Weiss from Trendspotting.com Research points out, finding early adopters isn’t at issue—it’s understanding the role they play and how they are to be approached. Getting it wrong can cost companies revenue. But getting it right can propel a product or brand to the front of the pack.

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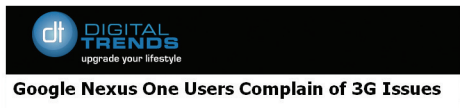
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The Influence of Early Adopters

ONLINE VOICES You don't want to mess with early adopters



dt DIGITAL TRENDS
upgrade your lifestyle
Google Nexus One Users Complain of 3G Issues



WEBOMATICA
Entertainment and Tech Digest
iPhone Price Drop: Some Early Adopters Are Mad



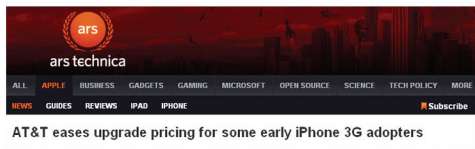
GIZMODO
Google Cuts Nexus One Upgrade Price by \$100 (and Refunds Early Adopters)



THE WALL STREET JOURNAL BUSINESS
SEPTEMBER 7, 2007
Steve Jobs Offers Rare Apology, Credit for iPhone



The New York Times
iPhone Owners Crying Foul Over Price Cut



ars ars technica
ALL APPLE BUSINESS GADGETS GAMING MICROSOFT OPEN SOURCE SCIENCE TECH POLICY MORE
NEWS GUIDES REVIEWS IPAD IPHONE **Subscribe**
AT&T eases upgrade pricing for some early iPhone 3G adopters



VALLEYWAG
Apple gives early iPhone adopters a \$100 money-back guarantee

\$399
Early adopters can be your greatest fans or biggest foes: a new price point for the iPhone led to howls

HOW APPLE COURSE-CORRECTED AFTER A MISSTEP

IT IS A RARE thing when a CEO as self-assured as Steve Jobs abandons his strategy for a product as strategically important as the iPhone. But just two months after the game-changing device was released back in 2007, Jobs encountered such vocal grumbling from early adopters that he had no choice. Their complaint? That they'd been taken as fools, paying \$599 for a product whose price suddenly dropped to \$399. Early adopters (or "fanboys," as some Apple followers call themselves) felt sucker punched, especially since many had waited in days-long lines to be the first to get their hands on the must-have gadget of the moment.

"The cuts penalized the fanboys (including yours truly) for being early adopters, and prompted iPhone owners to express their outrage across the web and beyond," wrote blogger Om Malik at GigaOm.

Noise from early adopters reached a fever pitch when headlines began to pop up in mainstream media like The New York Times. Backed into a corner, Jobs made amends, issuing a \$100 rebate and an apology:

"I have received hundreds of e-mails from iPhone customers who are upset about Apple dropping the price of iPhone by \$200 two months after it went on sale. After reading every one of these e-mails, I have some observations and conclusions....

First, I am sure that we are making the correct decision to lower the price of the 8GB iPhone from \$599 to

\$399, and that now is the right time to do it....

This is life in the technology lane. If you always wait for the next price cut or to buy the new improved model, you'll never buy any technology product because there is always something better and less expensive on the horizon....

Even though we are making the right decision to lower the price of iPhone, and even though the technology road is bumpy, we need to do a better job taking care of our early iPhone customers as we aggressively go after new ones with a lower price....

We want to do the right thing for our valued iPhone customers. We apologize for disappointing some of you, and we are doing our best to live up to your high expectations of Apple."

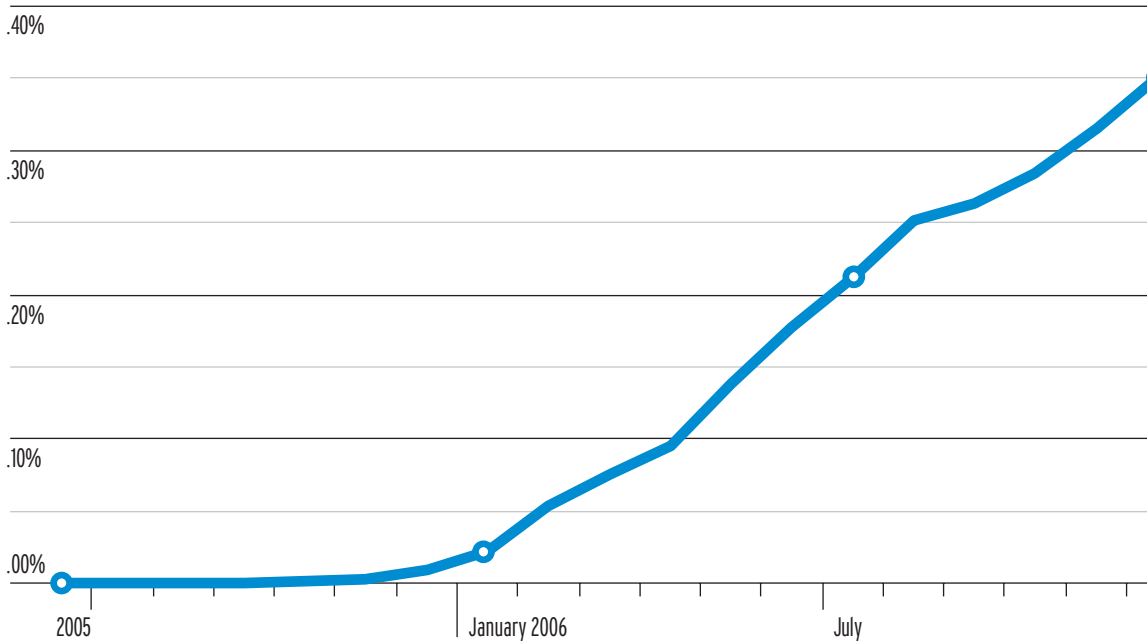
If there's anything Apple knows better than any player in the technology space, it is designing products and marketing them to a broad, diverse customer base. But even Apple found how easy it is to get tripped up by that most important segment: early adopters.

Defined as the first consumers to use or buy a product, they can be an elusive and mercurial group, prone to sudden shifts in opinion, possessing the weighty ability to make their views well known and to put tremendous pressure on a company, even one as mighty as Apple. The influence of early adopters stems from their first-look status and their place in the adoption cycle. And their impact can be positive, as well, as they have the power to help a product or service gain traction and find widespread adoption in the mainstream.



IPHONE:

Apple's mobile phone made fanboys drool, but then they felt sucker-punched after a price drop

CHART 2: OF YOUTUBE, WEB 2.0 AND EARLY ADOPTERS Share of visits to YouTube based on all internet visits in the U.S.

Source: Experian's Hitwise

.27%

Thanks to 'Lazy Sunday' on NBC's 'Saturday Night Live,' web users in 2005 found YouTube

Sociologist Everett Rogers, an agriculture student at Iowa State University in the '60s, spent 12 years studying the adoption of hybrid corn seeds. He identified five types of customer segments: the innovators, the early adopters, the early majority, the late majority and the laggards.

Rogers asserted that early adopters played a crucial role because they tended to be "opinion leaders" with a greater social status, a higher level of education and, frequently, a higher income. Early adopters, Rogers concluded, were more socially active and, therefore, played a crucial role in influencing the next group's adoption of the product.

Apple, for one, owes its historic growth in large part to early adopters, who famously show such remarkable rates of adoption.

Most recently, 14% of users upgraded to the latest iPhone operating system within its first six days. What's more, sales of iPhone units seem to track with Rogers' theory, building a solid base in their first year (3.7 million units). By the following year (2008), 13.8 million units shipped, while 25.1 million of the devices shipped in 2009, according to IDC. Whereas Rogers documented a process that took 12 years, adoption rates these days, as Apple demonstrates, are markedly shorter.

"Today, that cycle is six weeks," said Bill Tancer, general manager of global research at Experian Hitwise and author of "Click: What Millions of People Are Doing Online and Why It Matters."

YOUTUBE RIDES THE WAVE

In the digital realm, early adopters have played a crucial role in product launches, from Google's Wave collaboration application to YouTube, Facebook and Tweetdeck. They play several roles, in varying degrees, depending on the product and the early adopter: test user, thought leader, feedback loop—or all three.

"The reason you need to care about early adopters, even if you aren't one, is because this small group of people are going to change your world," Seth Godin, author of books about marketing such as "Purple Cow," told The New York Observer last fall.

Thanks to the rise of social media, early adopters have the potential to have even greater influence over products they buy and try, especially when it comes to gadgets and online brands. According to Forrester Research, 70% of adults use social networking sites, blogs or video.

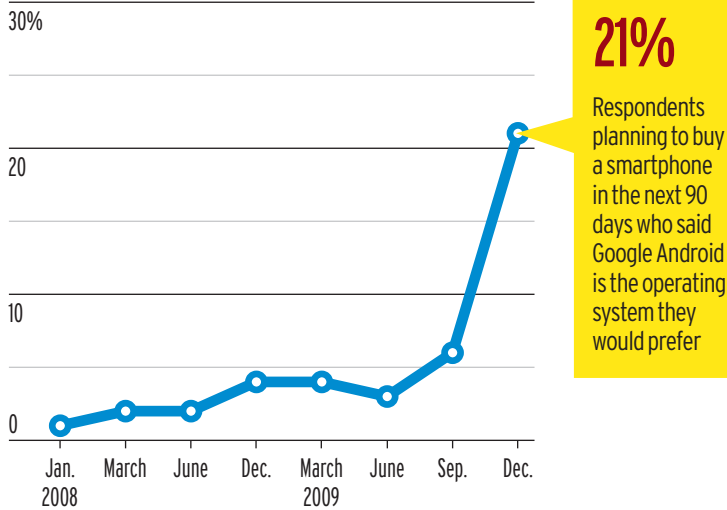
"In the last five years, early adopters have received a stage to influence others," says Taly Weiss, founder and CEO of Trendspotting.com Research. "Social media gave them the screen power. Early social media users have grown to be the main influencers, and their influence is far beyond technology."

As Tancer notes, early YouTube users, back in December 2005, spotted a "Saturday Night Live" digital short called "Lazy Sunday" and began sending it around the internet. The explosive popularity of the short, featuring cast members Chris Parnell and Andy Samberg performing a farcical hip-hop song about cannabis,



'LAZY SUNDAY': Widened the audience for 'SNL,' and lit a fire under YouTube

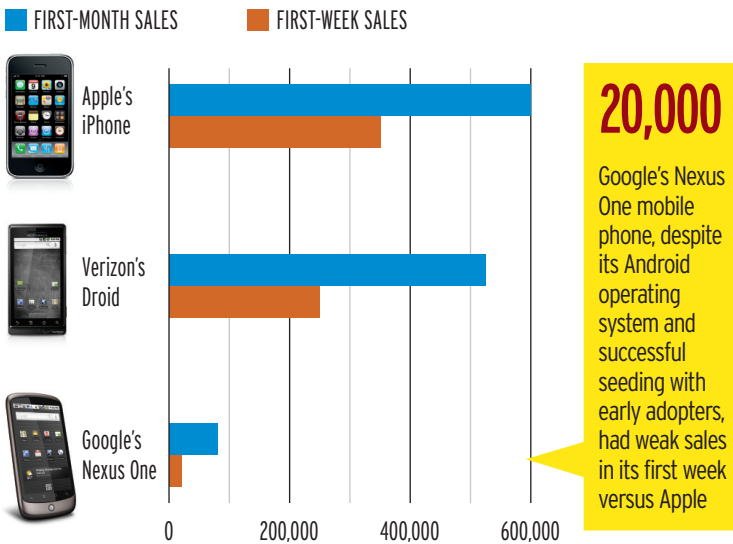
CHART 3: EXPECTATIONS How Google built buzz for its mobile platform Android



Source: ChangeWave Research

21%
 Respondents planning to buy a smartphone in the next 90 days who said Google Android is the operating system they would prefer

CHART 4: NEXUS ONE Early adopters voiced disappointment, and sales sputtered



Source: Flurry Inc., via ObamaPacman.com

20,000
 Google's Nexus One mobile phone, despite its Android operating system and successful seeding with early adopters, had weak sales in its first week versus Apple

helped the seven-month-old YouTube move from a negligible share of the online vide market to a real contender, according to Experian Hitwise (see chart, P. 5). "SNL" also benefited, regaining its footing among a previously declining viewership. It also led the show to embrace the web to boost its reach.

For YouTube, it was an opportunity to gain traction and awareness among consumers, and helped the brand "go from a complete unknown to besting Yahoo and Google video," Tancer pointed out. YouTube, launched by former PayPal employees with a \$11.5 million investment from Sequoia Capital, had gone live in May 2005. Marketing was nonexistent—but through word of mouth, a small and ultimately influential group of users tested the product and passed around links.

GOOGLE GETS IT WRONG

For Google, early adopters have helped create immediate, widespread buzz around its products. The launches of both Gmail and Google Wave tapped into the psychological idea of scarcity, with Google issuing a limited number of "invitations" to use those services before they were finally rolled out to the mainstream.

The outreach to the early adopter segment was intentional for Nexus One—but this time around, the outcome was mixed. In December 2009, the company distributed copies of the new phone to influencers such as Fred Wilson, a venture capitalist and early adopter in New York City who boasts 44,000 followers on Twitter and 63,000 subscribers to his blog, many of them also early adopters.

On January 5, 2010, the day the product went on sale, Wilson posted to his blog from the new device. He wrote: "In mid-December, as holiday gifts and cards were arriving daily in our office, I received a gift from Google. It was a Nexus One. I have been using it since that day as my primary phone.... All in all, the Google phone is a mighty fine phone and I'm staying on it for now. Thanks, Google."

The blog Engadget also received a review copy and, likewise, wound up on a positive note: "Despite the minor niggles, HTC and Google have put together pretty damn good looking and feeling phone; it's not without faults, but they're pretty few and far between."

Despite the successes among early adopters, Nexus One also angered users who complained of poor 3G connectivity and a lack of customer support. Sales came in at a sluggish 80,000 during its first month on the market. By comparison, Apple sold 600,000 units of the first iPhone in its first month (see chart).

The lesson? Early adopters aren't so forgiving when they have to open their wallets. "Google is learning that what works for freebies doesn't cut it for \$529 smartphones," wrote PC World.

Profiles of Digital Adopters

'Our job, as it were, is to help take something that's undocumented and discover its potential and its use. What are we already doing that these new tools make better? What can I do that I couldn't do before? Does this new tool make anything already do easier, or is it executed in a more clear way? It's not about finding new tools just for the sake of getting one more blog post on the chart. It's about hopefully rewarding developers for their efforts, rewarding early adopters and readers here by their getting early access to things that make a difference, and rewarding ourselves by building out the community in a new place. We are always on the lookout for shiny objects. We find them all the time and are happy to share with you. But if I've found one that works for me, you can expect me to latch onto it like a barnacle.'

—LOUIS GRAY, EARLY ADOPTER, BLOGGER AND MARKETING CONSULTANT, MAY 17, 2009

YOU CAN'T DIP INTO Twitter or the tech blogs without running into someone who claims to be "an early adopter." They are folks like Gray, a resident of Silicon Valley (and all that implies), active in a clubby online community of early adopters such as himself.

But there are others who hold just as much influence, like 45-year-old Julie Strietelmeier of Columbus, Ind., who reaches 300,000 people per month with her 13-year-old blog *The Gadgeteer*, or Matthew Caldecutt, a 26-year-old New Yorker.

These are not necessarily the nerds who populated the pages of "Microserfs," Douglas Coupland's iconic 1995 tome about people who work in the technology space. These days, early adopters make up a much broader category. That's because, as Sean Captain, a strategist in the media, entertainment and technology group at Iconoculture, put it: "We're at a point now where adopting technology is not the same as understanding technology. There are people on Twitter who don't understand the Twitter API, but they don't have to. The etiquette is more important." He added that "only a small portion of the population go in for the geek factor": the rest are seeking "cultural relevance. Anything communication-related is more culturally based."

Early adopters may fit a range of stereotypes, but a study by Forrester Research that marries their "technographic" profiles with psychological theories found that three key drivers compel early adopters:

■ RISK TAKING

A desire for novelty that exceeds caution and reflects a "universal openness to new experiences, including new products.... They are willing to take a chance on a product with little to no market history." There is also a desire to be first.

■ INFORMATION GATHERING

"There is an informational burden that needs to be overcome for new products, and early adopters are more like-

ly to seek out the information needed to inform their adoption decisions." But they also "seek to mitigate risk through information."

■ STATUS SEEKING

Early adopters take pride in showing off their purchases. Early adopters choose products that represent them to the world—their preferences as well as their social status." The study notes that this motivation dates back to 1899 and Thorstein Veblen's "conspicuous consumption," and the accumulation of goods a way to convey status.

WHAT DRIVES THEM

Bill Tancer, who studies early adopters, is one himself—not uncommon among technophiles, according to Paul Carton, VP-research at ChangeWave Research.

"For gadgets, it's the desire to be the first kid on the block to do that. I don't know what drives me—I just know I want it. I keep going back to the iPad site to see if they've opened registration," said Tancer, who fits both the risk-taking and status-seeking profile.

"What motivates me as an early adopter is marketing that shows what the product can do for me very specifically," said John Vasko, a social media specialist. The messaging he responds to the most "combines what you can do as well as a lifestyle approach. I'm on a quest to find more efficient ways of doing things."

"Early adopters are not always the people with the biggest reach, or the biggest footprint," said Steve Rubel, senior VP-director of insights at Edelman Digital. "They are the people who are respected [for their opinions on] what to buy. Every circle has one—like the family geek, the one who advises everyone on what to buy. Robert Scoble is that on a huge scale." Scoble, 45, is a former Microsoft employee who operates the well-known blog *Scobleizer*. He now works for IT hosting company Rackspace, and runs a startup called *Building43*.



TANCER

Experian Hitwise's global research guru and an early adopter



SCOBLE

Uses his blog *Scobleizer* to opine on new products

A FEW REAL-LIFE EARLY ADOPTERS

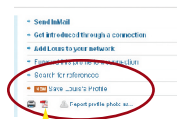


LOUIS GRAY

AGE: 32

LOCATION: Silicon Valley

JOB: Marketing consultant



PDF

Louis Gray, an early fan of LinkedIn, suggested letting users download resumes as a PDF

“HOW CAN YOU reach out to us? It takes someone who watches very closely,” said Louis Gray. “Early adopters want to feel unique, like you know them.”

One can learn a lot about Gray, 32, an early adopter and marketing consultant who lives in Silicon Valley with his wife and two kids, from reading his blog. Gray has plenty of opinions about technology and shares them in lists of “suggestions,” such as “10 Suggestions to Improve Google Reader.” He doesn’t like to spend time writing about things that don’t interest him. “I have more fun spending time with products I want to know better,” he said.

For Gray, the rewards of being an early adopter are information and influence. Gray talks about his suggestions for Google Reader, a product he relies upon throughout the day, every day, to scan hundreds of news sources and distribute links to his followers on Twitter and readers of his blog. He found the site lacking in customization and search functions—so, he wrote about it. The post garnered a record number of comments, was posted on Digg, was linked to by other influential early adopters such as Steve Rubel, Robert Scoble and the blog TechMeme, and led Gray to achieve record traffic.

But most telling was the comment left by a Google

engineer: “Funnily enough, the Reader team just had a big, all-day brainstorming session about where to go next, and ideas similar to many of your suggestions were discussed.”

Another time, Gray, a fan of LinkedIn, thought the site should allow individuals to download their resumes as a PDF, something now commonplace on LinkedIn and similar sites. He posted as much on his site.

Whether Gray is at all responsible for changes made to products he writes about, the fact that he even thinks they should be made empowers him and gives him validation. “I like going to LinkedIn and seeing the little PDF and thinking, ‘Oh, I had a part in that,’” he said.

Gray has about 14,000 followers on Twitter and 1,500 friends on Facebook (besting Robert Scoble, the most famous early adopter, by about 100). His blog traffic is much lower—less than 1,000 visitors per day, according to QuantCast, though his readers are avid technology enthusiasts and/or early adopters like himself, and active on his message boards.

“Companies do listen when early adopters talk, especially when they have a large microphone,” Gray said.

JULIE STRIETELMEIER**AGE:** 45**LOCATION:** Columbus, Ind.**JOB:** Editor in Chief, The Gadgeteer

WITH HER PIXIE HAIR CUT and wire-rim glasses, it's easy to take Strietelmeier for a nerd. And that she is, proudly. Since 1997, Strietelmeier has reviewed digital products on her blog, The Gadgeteer, which also has featured the critiques of 140 other reviewers. Working from a 27-inch iMac in her office in central Indiana, Strietelmeier and her four full-time editors publish several reviews each day, on products ranging from e-readers and

iPhone apps to GPS devices and game consoles.

Before becoming a blogger, Strietelmeier ran a multi-line bulletin board service, a pre-web service that accumulated a generally tech-savvy user base. Her TV-viewing habits trend toward reality shows and drama: "Survivor," "Prison Break," "Grey's Anatomy," "The Biggest Loser," "The Amazing Race."

And even though her blog logs 300,000 unique visitors per month, she spends little time building her Twitter following, which stands at 1,500.

Strietelmeier is an "information gatherer" through and through. Asked in a blog interview about what drives her desire to review gadgets, she replied: "the fun that I receive from learning about new products."

**MATTHEW CALDECUTT****AGE:** 32**LOCATION:** New York City**JOB:** PR executive, Trylon SMR

MATTHEW CALDECUTT COMES from a long line of early adopters. "My grandfather came over from England in the 1920s and wanted to work at New York Telephone because he heard they'd be using IBM machines for accounting," he said. "My father went to work there, too, to work on some of the new things they were developing. And I had a Commodore 64 in 1984, when I was eight."

These days, Caldecutt works at a PR firm in Manhattan, and his early adopter passion is "fueled by my interest in communications technology—what can make communicating with people easier."

Caldecutt owns an iPhone and a Droid that he picked up at an event put together by Verizon and Motorola. Every night, in fact, he can usually be found at such gatherings, sharing details in real time with his 3,000 followers on Twitter or via Tumblr. Caldecutt "checks in" on Foursquare every time he enters an establishment, and has become a "mayor" at 10 places in New York, based on the number of points he racks up each time he checks in.

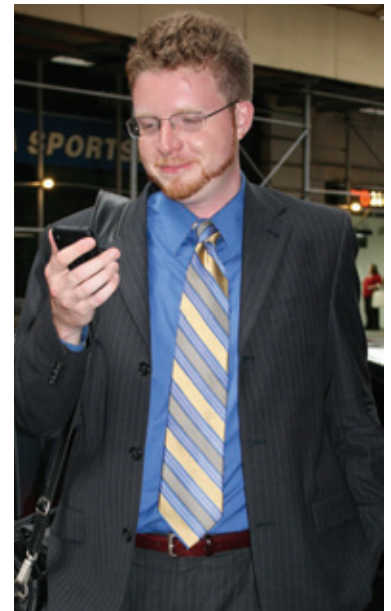
Caldecutt isn't at the center of the early adopter clique, and he's not necessarily handled with kid gloves or given personal attention. But he does expect to find himself on

event lists, like the one for the Droid in October 2009 held by Verizon and Motorola, where he was offered the device for free (service not included). This approach proved effective: "An early look at a product is excellent," he said.

Just because Caldecutt's name is not on a list doesn't mean he won't show up. When Urban Signals held a launch party for its iPhone app, Caldecutt wasn't invited—but got in anyway as the guest of a guest. At the party, he downloaded the app and wrote about it and the party on Tumblr. Caldecutt was among the first to use Dodgeball and Foursquare, two location-based mobile apps. And because he is connected to technology entrepreneurs, he was able to provide direct feedback to both companies.

Caldecutt's circle includes people like Christina Warren, an Anne Hathaway lookalike who proclaims on her blog: "Don't let the obsession for pretty clothes fool you. I am a hardcore geek—disassembled computers and makeup bags reside in the same space." Warren, 27, lives in Atlanta and writes for blogs including Mashable. She enthuses at the prospect of attending the Future of Web Apps conference and hosting an online show covering the event. Followers on Twitter? 13,000 and counting.

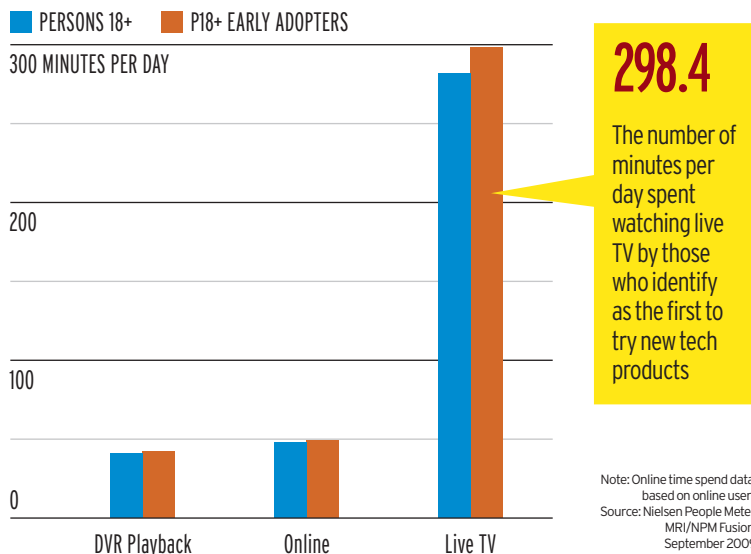
Caldecutt and Warren are part of a demo that has proven inconsistent in its embrace of technology, notes Iconoculture's Sean Captain. "Gen Y and 'Gen We' [as Iconoculture terms the pre-Gen Y generation] don't necessarily jump on new technology just because, but only if it's useful to them and their network," he said.



Younger early adopters aren't going to be dazzled by new technology just because it's new: Products have to prove their usefulness to the group

Digital Adopter Behavior

CHART 5: MEDIA SAVVY Media use among those who say they're first to try new technology



LOUIS GRAY meets up occasionally with Robert Scoble to talk about technology. As Gray said, they inevitably start by asking one another: “Well, what’s next? Where is it?” “It” is the shiny new thing, and early adopters sometimes travel in packs to find it—seeking it out on blogs, on Twitter, in magazines, in the real world, and at events such as the Consumer Electronics Show held in Las Vegas each January.

Gray and his cohorts use social media and their own blogs to share their knowledge and opinions about new technology. “A group of us try these things and talk about them on our blogs, on Twitter, in person,” he explained, describing his community as having “similar avatars” in the real world as online.

“There are a lot of myths and fables about early adopters,” said Dan Ness, principal analyst at Metafacts. “A lot of imagery around them.” But early adopters come in a variety of shapes and sizes, something he says marketers don’t always want to accept.

Several years ago, a Metafacts client objected to one of the individuals in an assembled focus group Metafacts had promised would be made up of early adopters. The suspect individual was male and in his forties—presumed to be over the hill. So, the thinking went, how could he possibly be an early adopter? “They wanted him removed,” Ness said. That is, until the subject whipped out his mobile phone and PDA. “He was one of the first in the Chicago market to carry a mobile phone,” Ness said. “True early adopters are about what they do, not what you see.”



CAPTAIN:

Early adopter aficionados can be found on A/V science forums and other sites discussing what’s culturally cool

The assumption is that early adopters are younger, because younger equals tech-savvier. But technophiles span all age groups. And their behavior can be surprising. As Captain points out, Gen Y and “Gen We” prefer texting (an older technology) to tweeting (a newer one).

MEDIA HABITS

If Gray and Scoble are anything like one group of digital adopters studied by Claritas, ranging in age from 45 to 64, they read *The New York Times*, *The Wall Street Journal*, *The New Yorker*, *Fortune* and *Esquire*. They watch BBC America, The Sundance Channel, Independent Film Channel and Showtime. They listen to National Public Radio and ESPN Radio.

Claritas found that younger digital adopters (ages 25 to 44) weren’t much different. The firm reported this group as reading magazines such as *The New Yorker*, *Esquire*, *Fortune*, *Forbes*, *Food & Wine*, *The Wall Street Journal* and *Architectural Digest*. They regularly tune into IFC, pay-per-view sports, VH1, Sundance, BBC America and MTV. They also listen to NPR.

A more ethnically diverse set of adopters Claritas terms the “Bohemian mix” have similar habits, but supplemented with niche media brands. This group reads *Black Enterprise*, *The New York Times*, *Essence*, *Vibe*, *The New Yorker* and *Vogue*. They watch *Noticiero*, *Telemundo*, *BET*, *IFC*, *The Disney Channel*, *MTV*, *Cinemax* and *Showtime* and soccer on any channel. They listen to radio formats such as urban contemporary, jazz, contemporary hit and NPR.

These early adopters are more mainstream than their geekier forbears—though that group does still exist, as “extreme techies,” in Nielsen’s parlance, a subset of what is now a broader group that self identifies as early adopters by saying they are first to try new technology (see chart above). “Extreme techies” account for 8% of the adult broadband population in the U.S., or 4.6 million consumers. Extreme techies’ media habits are largely focused online, including 91 minutes of web video per week, though 64% of this group also watches live TV.

Captain says that when it comes to consuming information online, the wider early adopter segment, “who are just generally fond of technology, are reading mainstream tech sites like *TechCrunch*, *Gizmodo* and *Engadget*. But the aficionados are in user groups like A/V science forums, trading discussions back and forth, ‘90s-style. *Wired*, *Mashable* and *BoingBoing*—those are more about what’s culturally cool.”

Marquest Media & Entertainment Research looked more closely at video consumed by early adopters, finding that most watch TV “on a time-shifted basis, use web video frequently and are 14 times more likely to have the capability to deliver their web video to the TV set. They are also six times more likely to have a mobile phone that can play video, and are 10 times more likely to subscribe to such a service on their mobile phones.”

Nielsen’s May 2009 study of early adopters of technology found, unsurprisingly, a propensity for technology ownership. According to the report, early adopters own an average of four cross-platform devices (including gaming consoles and cell phones) and use them to view TV or movie content, with 38% also having connected TV sets to their computers.

Teens, in particular, are devoted cell phone users, according to a 2009 report from Nielsen called “How Teens Use Media.” Teens make up 20% of the mobile video market and represent early adopters of this technology. Said Nielsen:

“Teens text at incredible rates, but are early adopters of all mobile media. Increasingly, the mobile phone plays a critical role in the media lives of teens. In the U.S., 77% of teens already have their own mobile phone. Another 11% say they regularly borrow one.”

DEMOGRAPHICS

There is disagreement over how many households or what portion of the U.S. represents early adopters of new technology. According to Claritas, fully 29% of households are early adopters, more than double the 13% Everett Rogers measured out nearly half a century ago. Marquest dubs early adopters of technology “SuperTrons” and finds that 15% of households fit this bill. Finally, Bridge Ratings finds 2.5% of the general population to be early adopters of new technology.

Early adopters are a well-off set, earning an average household income well above the national average of \$50,303 (2008), according to Claritas, which found that across all early adopter groups, the median household income was no less than \$51,588 and in some cases as high as \$84,506.

Among different age groups and genders, some trends are evident. Bridge Ratings looked at early adopters among Baby Boomers, splitting the Boomers into two distinct groups by age—those born before 1955 and those born after. It found that the older Boomers were less likely to be early adopters than the general population, although younger Boomers indexed much greater than the population (only 2% of older Boomers were early adopters, while 15% of younger ones were classified as such).

CHART 6: EARLY ADOPTERS ONLINE

Those who identify as early adopters make up a larger portion of the audience of these sites

DEMOGRAPHIC	UE (000)	EARLY ADOPTERS	INDEX
Break Media	1.94%	2.74%	141
Gizmodo	.98	1.38	140
Fox Entertainment Group	1.26	1.77	140
Gawker Media Network	3.26	4.12	126
Hulu	3.90	4.89	126
MTV Networks	5.11	6.34	124
NetShelter Tech Media	6.97	8.53	122
ESPN Digital	10.82	13.13	121
IMDb	9.21	10.99	119
Men’s Health	.64	.77	119

Source: Nielsen MRI/NPM Fusion, Sept. 2009

CHART 7: ETHNICITY REVEALS TRENDS % as share of all adults

TRADITIONAL INTERNET ACCESS	WHITE	BLACK	HISPANIC
Have desktop computer	66%	51%	64%
Have laptop computer	47	34	56
Online yesterday	59	45	60
Online several times at home	30	21	32
Online several times at work	28	18	36
Internet user	79	67	84
Broadband user	65	46	68
WIRELESS/HANDHELD ACCESS			
Wireless internet users	54%	60%	68%
Handheld data (ever)	66	71	83
Handheld data (yesterday)	41	48	62
Mobile internet (ever)	28	48	47
Mobile internet (yesterday)	17	29	29

Source: Pew Internet & American Life April survey conducted March 26-April 19, 2009
N=2,253; margin of error is +/- 2; survey conducted in English

CHART 8: INDEX OF DIGITAL ACTIVITIES Among those who are online or cell phone users

	WHITE	BLACK	HISPANIC
Number of online activities	4.1	3.3	4.1
Number of handheld data activities	2.2	3.1	3.7
Total number of digital activities	6.3	6.4	7.8
% who are internet or cell phone users	91%	87%	94%

Source: Pew Internet & American Life April survey, conducted March 26-April 19, 2009
N=2,253; margin of error is +/- 2; survey conducted in English

CHART 9: IT'S ALL ABOUT OUTLOOK

A 2008 study for Serena Software identified five unique attitudinal segments among technology early adopters based on differentiated responses to key questions

ALPHAS

Predominantly white males 35-44. Most likely to agree that technology has a positive impact on the world (94%) and to be working full-time (91%). These are the tech elite, immersed in technology. Alphas see technology as having a significant, positive impact on their lives and ability to communicate. At work, they are delegators, developing solutions to hand off.

ACCIDENTAL

Predominantly white females 25-54. Not as comfortable with technology as Alphas, Accidentals still have a deep understanding of how technology can improve their lives. With a less direct approach at work, they consider technology a tool to solve problems, but not the key to everything. Similar to Balanced, but more focused on work and enthusiastic about technology.

PRACTICAL

Predominantly white males 25-44. The most hesitant to agree that technology has a positive impact on the world (only 50%) or their lives (20%). Using all the technology that most other types are excited about, but they are less enthusiastic about the devices. They typically report to the Alphas and Accidentals at work, but are focused on implementation.

BALANCED

Predominantly white females 25-44. Although similar to Accidentals, they do not place technology or work at the center of their lives. Approaching their jobs as a means to fund other things they enjoy, this group leads more relaxed lives than other types, and are hesitant to adopt emerging technology until they see how it relates to their personal lives. The most likely to be students and the least likely to be workaholics.

LITE

Predominantly white males 35-54. The most resistant to adopting new technologies before they are mainstream, they are less likely to take risks, actively solve problems or create efficiency. At work, they may adopt a new process once it is proven effective in another department. The most risk averse segment in relationship to technology (only 1% are the first to try new technology), their work life (only 7% take frequent workplace risks) and at home (only 4% take frequent risks in their personal lives).

Source: Serena Software Masher Profile Exploratory Research Study, March 2008. Marketing research consultancy Penn, Schoen & Berland Associates conducted 700 online interviews of U.S. consumers. Each respondent was a PC and internet user, an early adopter heavily reliant on technology, and a decision maker on all technology purchases.

53%

of young women (Gen Y) identified themselves as early adopters. One researcher noted they are "the first to try new technologies, even before they become mainstream"

Nielsen's "extreme techies" tend to be male (63%), with a mean age of 31 and an average annual household income of \$67,000. Also, nearly half (47%) are married, and 57% have children younger than 18 at home.

While such a group holds down one end of the early adopter spectrum, a 2005 study by Women in Technology International, IDC and Intel found that women were becoming a greater part of the early adopter population, too:

"While women will not buy something for the sake of being first, women are early adopters of technologies that will clearly improve their lives. New technologies such as home networking (57%) and WiFi (24%) are favorites among women, allowing them to do more in less time."

Further, 53% of young women (Gen Y) in a 2008 study by Serena Software identified themselves as early adopters. As the researcher said, these are "the first to try new technologies, even before they become mainstream, ranking higher than any other profile."

Hispanic and African-American consumers also boast early adopters. Hispanics, in particular, adopt more technology and consume more media than the general population, according to a study by Yahoo,

Telemundo and Experian Simmons Research. Some of their findings:

- 90% have a cell phone (versus 79% of the general population);
- 66% use text messaging (versus 38% of the general population);
- 61% have taken photos on a cell phone (versus 79% of the general population); and
- Two-thirds have been online for more than five years.

African-Americans are more likely to use the mobile web, but have much lower than average broadband adoption, according to a 2009 study of wireless internet use by Pew Research, which found:

- 48% of African-Americans have, at one time, used their mobile devices to access the internet for information, e-mailing or instant messaging (compared to the national average of 32%);
- 29% of African-Americans use the internet on their handheld devices on an average day (compared to national average of 19%); and
- Compared to 2007, when 12% of African-Americans used the internet on their mobile

devices on an average day, use of mobile web is up by 141%.

Pew compared the use of digital technology among African-Americans to that of white consumers:

- By a 59% to 45% margin, white Americans are more likely to go online using a computer on a typical day than African-Americans; and
- When mobile devices are included in the mix, the gap is reduced to half; 61% of whites go online on the average day when mobile access is included, while 54% of African-Americans do.

Across a range of digital activities—some online, typically using a computer; others being non-voice data activity on a mobile device—African-Americans and whites, on average, perform the same number of activities.

TECHNOLOGY EXPECTATIONS

“Just because they’re early adopters doesn’t mean they’re looking at the category any different than anyone else,” said Robert Passikoff, founder and president of Brand Keys, a research firm that studies consumer expectations. “What drives the category for them is precisely the same as everyone else. They look at it the same as the laggards.”

The difference, he said, is what they *expect* a product will deliver. Early adopters possess higher standards for products and the companies behind them.

Brand Keys found that when it comes to smartphones in particular, early adopters are likely to have higher expectations than the average population for the brand, applications and navigation features than the general population. And when it comes to online books and music, early adopters expect a wider range of choices than the general population.

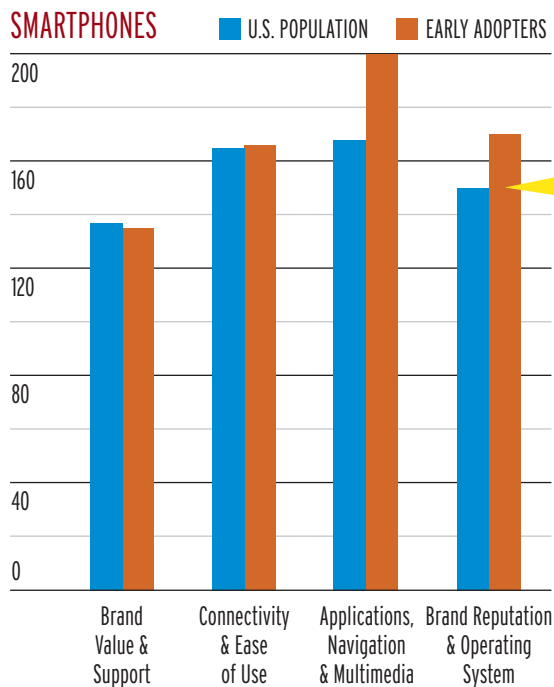
SPENDING HABITS

Because early adopters tend to have a higher income level than others in the adoption cycle, they are a more reliable group of spenders, according to Forrester Research. Spending online bucked the recession and stayed on course (20% of consumers spent more than \$1,000 in the second quarter of 2009, per Forrester). It also reported that 50% of Americans are gamers, 63% have a broadband connection, 27% own HDTVs and 75% have both a cell phone and a PC.

A 2007 study by Burst Media, after it created the Early Adopters Network, reported that early adopters

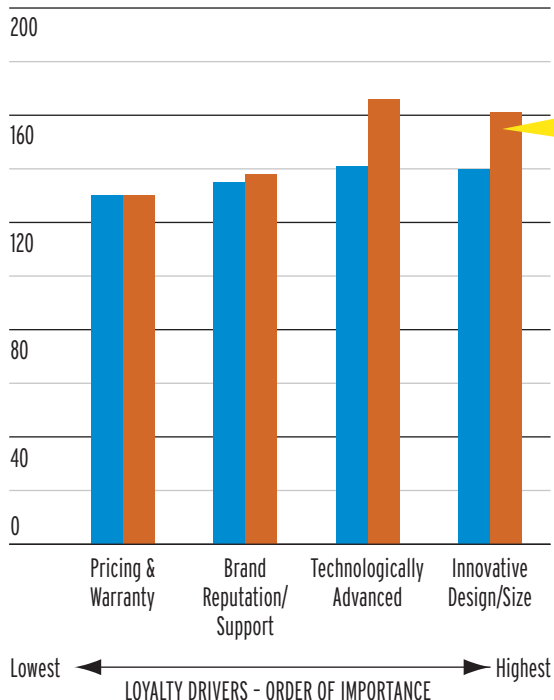
CHART 10: EARLY ADOPTERS EXPECT MORE FROM TECHNOLOGY

When asked how important these features were when considering a smartphone or computer laptop, early adopters over-indexed compared to regular consumers on just about every feature



170
Brand reputation, which connotes status, and the latest OS attract early adopters

COMPUTER LAPTOPS



161
Devices with a new design are also a quick way to signal to the tribe you've got a 'shiny new thing'

Note: Numbers are indices, benchmarked against 100. Source: 2010 Brand Keys Customer Loyalty Engagement Index

CHART 11: DIGITAL ADOPTER BEHAVIOR Which of the following do you agree with or do?

INFORMATION	EARLY ADOPTERS				LAGGARDS*
	ALL	CAREER-MOTIVATED	FAMILY-MOTIVATED	ENTERTAINMENT-MOTIVATED	ALL
I like to shop around before making a purchase	70%	71%	73%	67%	58%
I research products for purchase	53	56	52	51	34
I use comparison shopping sites	10	11	10	10	5
NOVELTY					
I'm always willing to try or do new things	46	44	39	52	25
I am constantly looking for new ways to entertain myself	26	16	9	48	9
STATUS					
I like to impress people with my lifestyle	11	11	4	15	2
I like to show off my taste and style	13	10	5	22	3
I am influenced by what's hot and what's not	12	11	7	17	5

70%
Early adopters are information gatherers who spend more time researching products and then telling other people what to buy

Base: 22,488 North American adults
* Base: 21,877 North American adults
Source: North American Technographics
* Benchmark Survey, 2009 (US, Canada), Forrester Research

62%
of early adopters are more likely to upgrade a mobile phone as soon as a new model becomes available

were more likely to purchase new technology products than their friends and family, and that they turned to the internet most often to learn about new products.

Claritas, in its study of three types of early adopters, observed that they tended to purchase high-end foreign auto brands like BMW and Mercedes, shop in high-end stores like Neiman-Marcus and Bloomingdale's, and travel by plane at least three times per year.

According to a study by Nielsen and Mindset Media, early adopters of new technology score high on certain personality traits (leadership, dynamism and assertiveness) while scoring low on others (modesty). Those traits indicate a propensity for certain purchase habits:

LEADERSHIP

68% are more likely to have purchased three or more computers in the past two years.

DYNAMISM

58% are more likely to have purchased three or more flat-screen TVs in the past two years.

ASSERTIVENESS

62% are more likely to purchase a new cell phone when the latest and greatest model hits the streets.

MODESTY

45% are more likely to upgrade when a new model is available.

Only Yahoo! offers the powerful combination of next-generation technology, immersive creativity and quality reach that drives real results.



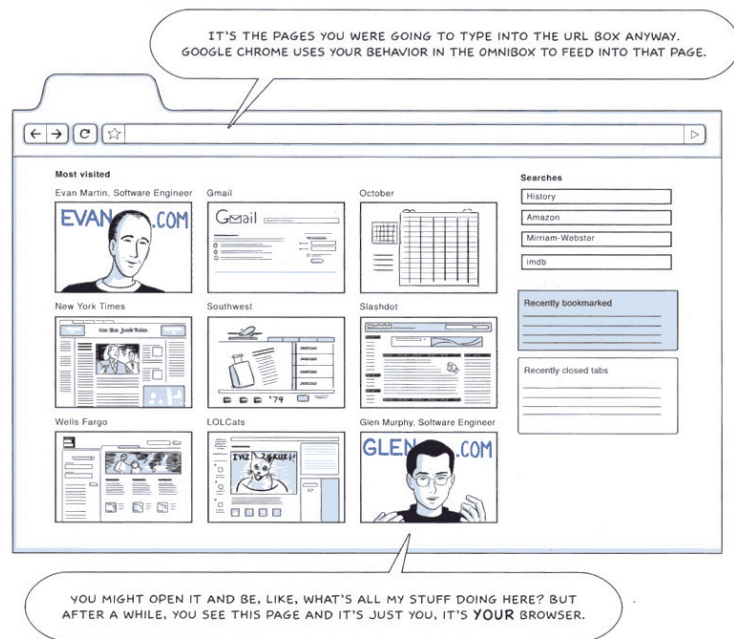
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Marketing to Digital Adopters

'Release early, release often. We think that's the best way to develop software that delights people.'

-MARK LARSON, GOOGLE

"WE LIVE IN the era of 'beta,'" said Iconoculture's Sean Captain.

We can credit Google for that. With every new product launch, the company slaps on a "beta" label and waits for the early adopters show up—which they inevitably do. Google Wave, an organization tool, was launched on an invitation-only basis. So was Gmail. Both products carried the "beta" label until early adopters had signed on, provided feedback and improved the product. There are no secrets about this approach. Writing on Chromium, the blog for Google developers of the Chrome browser, the strategy was explained by Mark Larson, Technical Program Manager:

"Release early, release often. We think that's the best way to develop software that delights people. With Google Chrome, we want to release fewer features more often instead of making you wait 12 months for the next Major Dot-Oh Release Jam-Packed With Features. We can get your feedback faster, fix things faster, and release new improvements as soon as they're ready. We want Google Chrome to stay nimble so it can keep pace with changes in the sites and web apps you use.

Because we don't have those big Dot-Oh release milestones on the calendar, we don't have long periods of beta testing new features. Instead, we use automatic

GOOGLE CHROME COMIC BOOK

Appealing to early adopters' sense of discovery, this 38-page comic book revealed the inner workings of the new browser

update channels to release Google Chrome to a community of early adopters. The channels are essentially a never-ending beta test and a continuous feedback loop that lets us rapidly develop new ideas into solid product features.

BEYOND BETA

With Chrome, Google went beyond its simple "beta" tactic: it also produced a 38-page comic book and distributed it to journalists, employees and some key early adopters. The comic book, written by Scott McCloud, revealed the inner workings of Google's new browser.

"Google appeals to early adopters' sense of discovery," Experian Hitwise's Tancer said.

The stakes were higher with Chrome than other Google products. Microsoft's Internet Explorer had 67% market share, followed by the open source Mozilla's Firefox, which had rapidly gained on Explorer in the previous few years and held at 23% of the market.

The comic book was intended to differentiate Chrome from the other browsers by appealing to the early adopters' interest in how it worked. It garnered massive attention in the mainstream media and on tech blogs, and one year later, off came the "beta" label. However, Chrome had only garnered 3% market share, and though early adopters appreciated its speed over Explorer, they also voiced complaints that it didn't do enough to protect privacy.

"Beta is almost too late now," said Tancer. "If it was 'alpha,' we might be more forgiving."

"Forgiving" is key, as many early adopters see themselves as part of the development process. "What marketers do right is use feedback from the community to shape the products," said Edelman's Rubel. "What works is collaborating, when they view early adopters as a partner and not just as an amplifier."

"Marketers, upon release of something, need to be able to take a lot of flak and be able to respond to it," said John Vasko, a social media specialist and early adopter. "Even," he added, "if it is just in the form of 'Thank you for your feedback.'"

Caldecutt, the trend-setting early adopter, vented his frustrations with AT&T's service on his Twitter feed.

"AT&T wrote back to me," he said, and helped him get a better deal on his service. "I followed up with a tweet," noting that the company's rapid response turned his ill will into goodwill.

According to Taly Weiss at Trendspotting: "Early adopters are physically easier to reach but now much harder to 'buy'. Most of the brands (and Apple is one big exception) have lost their attractiveness. Brands that can give early adopters a good reason why will have a chance to influence. Good value can be new tools to experiment with. If early users will find it handy, they will be willing to spread it. Otherwise, they will not hesitate to share their real thoughts."

While more than half of all early adopters research products before they buy them, only one-third of laggards do, according to Forrester. Thus, information is king in this equation. A Forrester report observed: "Smart investment in information campaigns geared toward early adopters will give these consumers the information they want and will allow product strategists to influence the market more effectively pre-launch."

Early adopters can become quite specific in how they want to receive that information. Rob Diana, a 38-year-old early adopter who runs the RegularGeek blog, wrote:

"First, we want communication, not just a press release. Sending a press release to a blogger or early adopter shows that we are just another place to get some coverage and you really did not look at who you were sending it to. For non-free products, pricing becomes part of the whole package. If you want early adopters to review a new service, the price is a major factor. A service may be fantastic for a blogger until they see a \$5000 price tag. Timing is important as well, but not just an early look at a product. It is not entirely helpful to get access to something that is not even in a private beta. The product would likely change so much by the time it is released to the public that the initial review becomes worthless. Early access to a product that will be launched in a few days would be very cool for some people, though."

Marketers do have to be careful in their communication with bloggers ever since a ruling by the FTC in October 2009 requiring bloggers to reveal any connections to marketers and whether they received free products or were paid for them.

Those blogging about Apple products won't have this

to worry about. Unlike Google, Apple doesn't release its products early. So, early adopters of the iPhone, iMac, MacBook or any other Apple product must wait until they're available to the general public.

But Steve Chazin, who runs the MarketingApple blog and once held sales and engineering roles at Apple, noted that through its marketing, the company targets early adopters while striving to appeal to aspirational mainstream customers. "Apple doesn't pay that much attention to early adopters," he said. "Apple believes the customer hasn't thought of all the cool things." But as noted in the iPhone price-cut example, Apple has figured out it needs to find a balance between acknowledging the role of the early adopter and selling a lot of new devices to that majority in the middle of the adoption curve.

OVEREMPHASIZING THE EARLY ADOPTER

By limiting its reliance on early adopters, Apple fits with Seth Godin's view that it's possible to overemphasize the early adopter phase. "If you want to stick around for a while, you need to make the difficult sales to the middle of the market, or have a ready supply of new stuff ready to entertain the never-satisfied early adopters," he said.

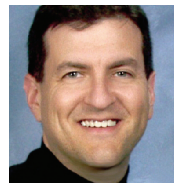
Godin suggests that treating segments of your customers differently can work if marketers appear consistent and fair. "People in coach don't mind the folks in first class getting more service, because they'd like to be there one day," he said. "People at nightclubs like watching celebrities being whisked to the front of the line, because it reinforces their belief that they're at a special place. The trouble kicks in not when you treat different people differently, but if it's random, or unfair, or unpredictable." That's the painful lesson Apple learned with the release of the iPhone.

When it comes to early adopters, the segmentation is even more granular. As Forrester noted in a report on marketing to Gen Y called "Influence the Youth Brand Influencers": "Marketing leaders should understand that brand leaders share more of their interests in small, face-to-face groups rather than online. By linking entertainment and marketing, by giving brand leaders products and services they can customize, and by integrating experiences from the online world to the offline one, marketing leaders can help ensure that their brands are the ones brand leaders share."



GODIN:

'If you want to stick around for a while, you need to make the difficult sales to the middle of the market, or have a ready supply of new stuff ready to entertain the never-satisfied early adopters'



CHAZIN:

'Apple believes the customer hasn't thought of all the cool things'

Conclusion

'One of the main roles of the change agent is to facilitate the flow of innovations from a change agency to an agency of clients. For this type of communication to be effective, the innovations must be selected to match the client's needs. For the linkage to be effective, feedback from the client system must flow through the change agent to the change agency so that it appropriately adjusts its program to fit the changing needs of the client. Change agents would not be needed in the diffusion of innovations if there were no social and technical chasms between the change agency and the client system.'

-EVERETT ROGERS, 'THE DIFFUSION OF INNOVATIONS'

EARLY ADOPTERS CAN be a new product's best friend or worst enemy, and sometimes both. For Apple, early adopters have helped establish new products, buying new units by the hundreds of thousands in the first few months. But cross this group with a price cut or some other insult, and their ability to influence others becomes a double-edged sword.

While marketers of technology products are best known for courting early adopters, marketers in any field can learn from how social media can influence a product launch. Early adopters spend time communicating with one another on social networking sites and on their blogs. Marketers would do well to take note—early and often—of what this group is saying, to anticipate how best to communicate with them.

Early adopters can be identified by what they do, not who they are. They do tend to fall along certain demographic lines—educated, higher income, male (though this is shifting), white (also changing), and employed in the tech industry (again, to a lesser degree). But it's not *who* they are that matters; it's *how* they consume information, *when* they buy products and *how* they communicate with one another.

Unlike the general population, early adopters are more likely to be risk takers. They are status seekers, but they also put a higher value on information than most other consumers. Being "in the know" matters a lot to early adopters. They are very willing to seek out information on your product, and to offer strong opinions

about it. Early adopters of digital technology identify themselves as such, and consider it a badge of honor.

Find those individuals who are going to be your advocates, and take the time to understand what makes them happy. Be upfront about missteps, and correct course quickly. There is nothing early adopters like more than to be heard by marketers. Louis Gray takes pride in how he believes he has influenced Google and LinkedIn. Matthew Caldecutt returned the favor after AT&T heard and responded to his complaint, by letting his Twitter followers know that AT&T was listening. But fail to acknowledge them (as Google found with the Nexus One phone), and their voices only grow louder.

These times have little in common with nearly half a century ago, when Everett Rogers did his breakthrough research. Early adopters, as in Rogers' day, can still help to establish a new idea or product—but now, they do so at the warp speed of weeks or months, not years. Marketers would do well to be prepared for any possible response and address it directly and promptly so as not to lose ground—or market share.

Laura Rich is a journalist who has studied and written about digital media since 1995. Her work has appeared in publications such as The New York Times, The Industry Standard, Fast Company and Portfolio.com.

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