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## The Top 10 Most Wired American Cities

*Austin-Area Residents Are The Most Connected Americans*

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### EXECUTIVE SUMMARY

Where do the most connected Americans live? Of the 50 most populous cities in the US, Austin, Texas is 2005's most wired metro area. Also among the top 10: Hartford, San Jose, Washington, D.C., San Diego, and Orlando. The South and the Midwest rank mostly toward the bottom. Larger metro areas like New York, Los Angeles, and Chicago also miss the top of the list.

#### THE AUSTIN METRO AREA HAS THE MOST-WIRED CITIZENS IN THE US

As high-speed access becomes increasingly available and affordable across the US and local businesses like shops and banks come online, 67% of Americans have taken to the Net. Where do the most wired of these Americans live, and where do the Internet laggards reside? To compare Web and online activity adoption among the 50 most populous US metro areas, we combined five key characteristics and behaviors of wired Americans into a wired index. Our wired index:

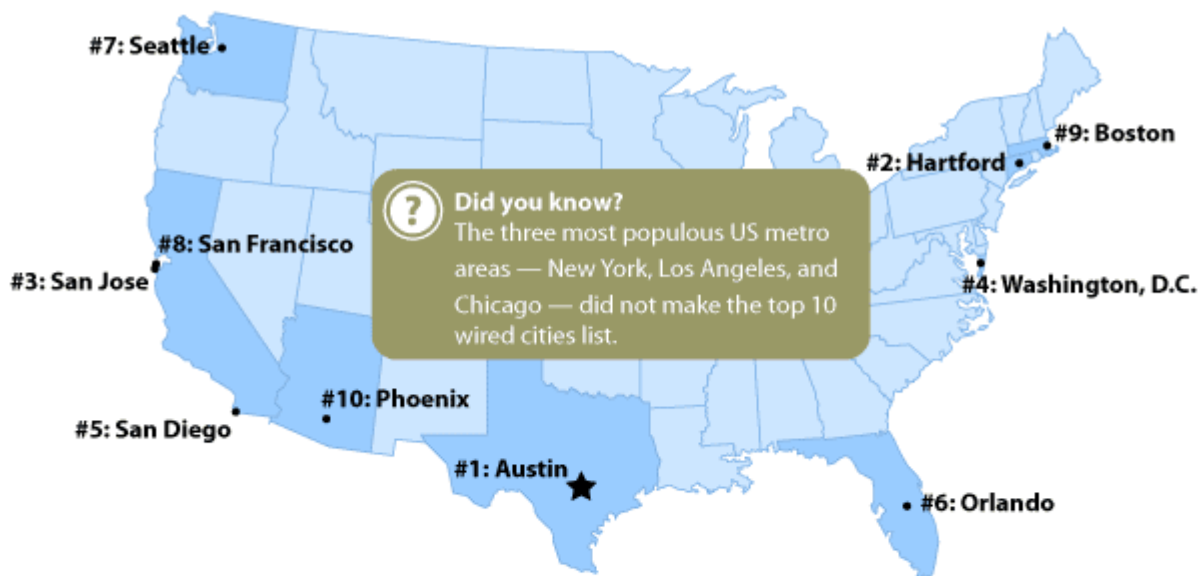
- **Goes beyond levels of PC ownership.** Of the most populous metro areas covered in Forrester's Consumer Technographics® 2005 North American Benchmark Study, only three — New Orleans, Pittsburgh, and Milwaukee — have less than 70% PC ownership at home. The widespread adoption of PCs at home suggests that PC ownership alone doesn't suffice for comparing metro areas.
- **Takes into account four key Web behaviors.** With almost ubiquitous PC ownership, a metro area's connectedness instead depends on its portion of "wired" households. We calculate each metro area's wired quotient using levels of adoption of four online behaviors: going online, purchasing online, banking online, and using a home broadband connection. We aggregate these values into one number to create the wired index.
- **Compares every city with the most wired metro area.** Each city's level of Web adoption is compared with the most wired metro area, showing how close — or far behind — it is from the leader: Austin. This year's runner-up, Hartford, has a wired index value of 0.96, meaning that it is 96% as wired as the most wired city, Austin. This year's least wired metro area, Pittsburgh is only 69% as wired as Austin, with a wired index score of 0.69 ([see Figure 1](#)).

#### LARGE, SOUTHERN, AND MIDWESTERN CITIES DON'T MAKE THE TOP 10

What puts a city in the top 10? Rapid population growth, high-tech industry, and a growing need for tech workers in sectors like insurance, finance, and government put many of our top cities ahead of the pack. Still, the most wired metro area in the US — Austin — does not even rank among the US Census' 30 most populous metro areas, while many of the country's largest areas don't make the top 10 cutoff. The wired index reveals a few surprising points:

- **Many of the most populous metro areas don't score highly on the index.** The three most populous US metro areas — New York, Los Angeles, and Chicago — don't make the top 10: Los Angeles is 13th, New York is 30th, and Chicago is 32nd. A broad distribution of incomes in these metro areas may play a part in their lower wired-index scores.
- **The Southern region has few representatives among the most wired cities.** With the exception of Orlando — the sixth most-wired metro area in the US — the South makes a poor showing among the wired list; Atlanta, the next highest-ranking Southern city, is 23rd. A handful of other Southern cities fall at the bottom of the list, scoring only between 0.74 and 0.78 on the index: Nashville, Memphis, New Orleans, and Louisville.
- **The Midwest makes a poor showing among wired cities.** Though not a single Midwestern metro area appears in the top 10 list, the most wired of the Midwestern cities rank a respectable 16th and 17th among the 50 most populous: Minneapolis/St. Paul and Kansas City, Missouri both score 0.86 on the wired index. Indianapolis and Detroit round out the Midwestern metro areas in the top 30, but four of the 10 least wired cities are also in the Midwest. Cincinnati, Milwaukee, Cleveland, and St. Louis all score 0.77 and below on the index.

## 1-1 Mapping the top 10 most wired metro areas in the US



## 1-2 The most and least wired metro areas in the US

A spreadsheet that includes indexing for the remaining 30 US metro-areas is available online.

### Top 10 most wired US cities

Rank	City	Index value
1	Austin	1.00
2	Hartford	0.96
3	San Jose	0.93
4	Washington, D.C.	0.92
5	San Diego	0.90
6	Orlando	0.90
7	Seattle	0.89
8	San Francisco	0.89
9	Boston	0.88
10	Phoenix	0.88

### Bottom 10 most wired US cities

Rank	City	Index value
41	Nashville	0.78
42	Cincinnati	0.77
43	Milwaukee	0.77
44	Memphis	0.76
45	Cleveland	0.76
46	St. Louis	0.76
47	Buffalo	0.74
48	New Orleans	0.74
49	Louisville	0.74
50	Pittsburgh	0.69

Base: US households

Source: Forrester's Consumer Technographics® 2005 North American Benchmark Study

\*The wired index measures adoption of key Web technologies and behaviors, including being online, buying online, banking online, and broadband adoption.

Source: Forrester Research, Inc.