

The Digital Future Project 2010

Surveying The Digital Future
YEAR NINE



A Decade of Exploring
the Digital Realm

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The 2010 Digital Future Report

Surveying The Digital Future

Year Nine

A Decade of Exploring the Digital Realm

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Surveying The Digital Future

Year Nine

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The 2010 Digital Future Report

Surveying The Digital Future

Year Nine

A Decade of Exploring the Digital Realm

Welcome to “Surveying the Digital Future,” the report of the Digital Future Project.

The publication of this edition represents an important landmark for the Digital Future Project: this report marks our tenth year of exploring the views and behavior of Internet users and non-users in the United States – now the longest continuing study of its kind.

When the Center for the Digital Future began its work in 1999, it was one of the first research organizations to devote its primary efforts to the study of online behavior. However, at that point Internet use was already relatively mature; the portals to the Web had already been open to public use for more than six years, and some two-thirds of Americans went online. Conventional wisdom could have suggested that with such a high level of Internet penetration and several years of use, views and behavior about online technology might be stable – or stagnant.

Yet beginning with our first Digital Future Study in 2000, and in every year since, we have found extraordinary levels of shifting views, new and evolving attitudes about technology, adoption of new media, and casting off of old methods as part of involvement – or not being involved -- in the online experience.

The Center is the first organization to develop a longitudinal panel study of the views and behavior of Internet users and non-users. In 2000, we published our initial findings in what has become the comprehensive, year-to-year examination of the impact of online technology in the United States. The objective of this report is the same today as it was when it was first created in 2000: to explore the changes in actions and opinions that occur in relationship to online use – or non-use – of online technology, as well as to monitor the emergence of changes yet to come.

This work is part of the World Internet Project, which is organized and coordinated by the Center for the Digital Future in the USC Annenberg School for Communication & Journalism. Included in the World Internet Project are the Center's work and partner studies in countries in North America, Europe, South America, Asia, the Middle East, and Australasia.

The USC Annenberg School Center for the Digital Future: Exploring The Impact Of The Internet

We created this project because the Internet represents the most important technological development of our generation; its effects may surpass those of television and could someday rival those of the printing press. If similar research had been conducted as television evolved in the late 1940s, the information would have provided policy-makers, the media, and ultimately historians with valuable insights about how broadcasting changed the world.

Our objective is to ensure that the Digital Future Project studies online technology and capitalizes on the opportunity that was missed as television developed. By beginning our study of the Internet early in its evolution as a worldwide communications and information-gathering tool, we can understand the effects of the Internet as it grows, and not as a postscript after it has matured.

To achieve this objective, the Digital Future Project surveys individuals in more than 2,000 households across the United States, compiling the responses of Internet users and non-users. Each year we contact the same households to explore how online technology affects the lives of those who continue to use the Internet, those who remain non-users, and those who move from being non-users to users, and vice versa. (Those households that drop out are replaced with new ones.) We are also noting changes as users shift from Internet access by modem to broadband.

The Digital Future Project is not restricted to investigating a particular method of accessing the Internet. As new types of access -- such as wireless or other methods now unknown -- become available, the project is tracking them. The project is open to exploring all aspects of change on the Internet and its emerging applications; for example, in the past four years we have expanded our findings about online communities and social networking. We will continue to monitor online technology as it transforms in yet-unexpected ways.

Our analytical viewpoint is evolving as well: last year, for example, we adopted as one of the primary categories of our research a comparison of "light users" (5 hours or less per week online) vs. "heavy users" (more than 24 hours per week online) -- a change from our long-standing comparison of "new users" vs. "experienced users." We made this change because with only 18 percent of Americans now identified as Internet non-users, the opportunities to develop data about comparisons of different groups of users offers more prospects for insight, especially when comparing behavior based on the different amounts of time users spend online each week.

Why An Ongoing Study Of The Internet?

The Digital Future Project differs from most other studies of the Internet in five principal ways:

- **The Digital Future Project looks at the social impact of the Internet**

Most Internet studies gather data about who is online, how long they are online, and what they do online. The Digital Future Project also compiles this information, but then examines the implications of the use of online technology, and links this use to a broad range of values, behavior, attitudes, and perceptions.

- **The project focuses on Internet non-users as well as users**

The Digital Future Project follows how the behavior and views of Internet users differ from those of non-users. Especially important is noting changes in the behavior and views of individuals who are initially non-users and later become users.

- **The project looks at the same group of people year after year**

The Digital Future Project comprehensively examines the effects of the Internet over the course of years on the same group of people. The research team maintains a core sample of respondents, and tracks short-term and long-term changes in their behavior, lifestyle, attitudes, and Internet use.

- **A worldwide effort**

The USC Annenberg School Center for the Digital Future created and organizes the World Internet Project, which includes the Digital Future Project and similar studies in countries worldwide (for contacts of the worldwide partners, see page 199). Through this team of international partners, the World Internet Project studies and compares changes associated with the Internet in different countries and regions, creating an international picture of change in online technology, use, and impact.

- **A principal goal of the Digital Future Project is to engage government and private industry decision-makers who can create policy based on our findings**

For this project to be truly effective, we involve public and private organizations that are committed to using our results. We have been allied with an unprecedented array of corporations – several of which are direct competitors – and foundations, all of whom are engaged with us in an ongoing dialogue about the issues we explore in our studies.

The Digital Future Project: Key Areas

The 2010 Digital Future Report includes findings that compare Internet users to non-users; light users (5 hours or less per week online) to heavy users (more than 24 hours per week online), and users within different demographic groups.

The survey is organized into five general subject areas:

- Internet Users And Non-Users: Who Is Online? Who Is Not? What Are Users Doing Online?
- Media Use And Trust
- Consumer Behavior
- Communication Patterns
- Social Effects

The 2010 Digital Future Report includes a broad sampling of more than 100 major issues from this year's survey. We hope you will be enlightened by this exploration of the views and behavior of Americans across a decade of their use of the digital realm, as we continue to develop our understanding of how the Internet is transforming our world.

Jeffrey I. Cole, Ph.D.

Director, USC Annenberg School Center for the Digital Future

Founder and Organizer, World Internet Project

Highlights:

The 2010 Digital Future Project Year Nine

In 2000, the first report of the Digital Future Project created a baseline profile of behavior and attitudes about Internet use and non-use in five major subject areas: who is online and who is not, media use and trust, consumer behavior, communication patterns, and social effects.

The next eight years of this study, conducted in 2001, 2002, 2003, 2005, 2006, 2007, 2008, and 2009, have continued the year-to-year appraisal of more than 100 major issues. The results explore the views and behavior of all respondents, as well as specific groups: Internet users, non-users, light users (5 hours or less per week of use), heavy users (more than 24 hours per week of use), and comparisons between them.

Here are highlights of the five major areas in the 2010 Digital Future Project:

* * * * *

Highlights: The 2010 Digital Future Project – Year Nine

“Light users” = 5 hours or less per week using the Internet

“Heavy users” = more than 24 hours per week on the Internet

Internet Users and Non-Users: Who is Online? Who is Not? What are Users Doing Online?

1. Internet Use in the United States

For the first time in the decade of studies conducted by the Digital Future Project, Internet use has surpassed 80 percent of Americans – now 82 percent. Less than 20 percent of Americans are not Internet users. *(Page 35)*

3. Internet Use and Age

Not surprisingly, Internet use continues to increase as age decreases. In the current study, 100 percent of respondents age 24 or under use the Internet. However, a surprisingly high percentage of Americans between 36 and 55 -- those who most likely would have been early adopters of technology -- are not Internet users. *(Page 37)*

4. Internet Use and Income

Even though the expense of using the Internet is cited by only 11 percent of non-users as a reason for not going online, the Digital Future Project continues to find that Internet use has a strong relationship with income. *(Page 38)*

5. Hours per Week Online

The amount of time that Internet users spend online has grown in each year of the Digital Future studies, and has now reached an average of 19 hours per week. Even though more than two-thirds of Americans have gone online for a decade, the largest year-to-year increases in weekly online use have been reported in the two most recent Digital Future Studies. *(Page 39)*

7. Activities on the Internet: Communication

Users frequently go online for a variety of communications activities, but a notable percentage of users do not participate in more recently-developed Internet applications, such as instant messaging, working on blogs, participating in chat rooms, or making or receiving phone calls (85 percent). *(Page 40)*

14. Working Computers in the Home

Multiple computer ownership continues to be a growing trend. In the current study, more than half of respondents (51 percent) said they own two or more computers; of those, 28 percent own three or more computers. The largest overall growth in computer ownership was reported by respondents with four or more computers. *(Page 45)*

18. The Internet at Work: Active Use

Internet users report that they are actively going online nine hours per week at work on average – a significant increase for the second straight year and the highest level thus far in the Digital Future Project. *(Page 47)*

19. The Internet at Work: Non-Work Activities

An increasing percentage of users who go online at work said they use the Internet for non-work related reasons, among them general Web surfing, chatting, instant messaging, and reading and writing e-mails.

(Page 48)

20. Using the Internet at Home for Work

In the current study, 57 percent of respondents who use the Internet at work said they sometimes or often go online at home for their jobs – the same percentage as in 2008. *(Page 49)*

21. Productivity and the Internet at Work

The percentage of users who said the Internet at work makes them more productive remains high, but nevertheless continued to decline from previous years. *(Page 50)*

22. Internet Connection at Home: Modem, Broadband, Cell Phone

Internet access through a broadband connection has increased in every year of the Digital Future Project, and has now surpassed 80 percent of Internet users -- up from only 10 percent in 2000. *(Page 51)*

26. Internet Access by Cell Phone and Wireless Computer

Internet access through cell phones and wireless computers continues to increase, growing substantially in the current Digital Future Project and reaching a new high level for the study. *(Page 54)*

30. Communication Technology: How Does it Affect the World?

Internet users and non-users continue to express divergent views about the impact of new communication technology on the world. The percentage of users who said communication technology is making the world a better place has generally been declining for five years. *(Page 58)*

Internet Non-Users**33. Internet Non-users: Were They Ever Online?**

Of the 18 percent of Americans who are not currently using the Internet, 39 percent had previously gone online, and had used the Internet for an average of three years before stopping. *(Page 61)*

34. Internet Non-Users: Reasons for Not Being Online

Those who do not go online continue to offer four principal reasons for not going online -- but some new trends are developing. *(Page 62)*

35. “Internet Dropouts”: Why Do Users Stop Going Online?

“Internet dropouts” -- those who previously used the Internet but no longer go online -- continue to report several principal reasons for continuing to be non-users. But as with other non-users, some of the responses by Internet dropouts changed significantly in the current Digital Future study. *(Page 63)*

39. Internet Dropouts: Will They Go Back Online?

The percentage of Internet dropouts who said they will go back online declined considerably in the current study. *(Page 65)*

Media Use And Trust

40. Views about Sources of Information and Entertainment

In the current Digital Future Project, a large majority of respondents age 17 and older said that the Internet was an important or very important source of information for them -- higher than the figure reported for television, newspapers, or radio. Comparing the views of users about the importance of entertainment sources, television ranks highest, with 79 percent of users saying it is an important or very important entertainment source for them, compared to the Internet, radio, and newspapers. *(Page 67)*

44. Reliability of Information Online: Views of Internet Users

For the third year in a row, a declining percentage of Internet users said that most or all of the information online is reliable. *(Page 71)*

46. Online Information: Reliability and Accuracy of Frequently-Visited Web Sites

Internet users have much more faith in the Web sites they visit regularly than they do in information online overall, but that faith continues to decline. *(Page 73)*

48. Web Sites: Which Are Reliable and Accurate, and Which Are Not?

The percentage of Internet users who said that most or all of the information posted by individuals, governments, and established media is reliable and accurate rose slightly in the current Digital Future Study. *(Page 75)*

55. Social Networking Sites: Reliability and Accuracy

A new question for the Digital Future Project found that only 15 percent of users said that most or all of the information on social networking sites is reliable and accurate. *(Page 81)*

57. Search Engines: Reliability and Accuracy

A majority of Internet users said that most or all of the information provided by search engines such as Google is reliable and accurate. However, 12 percent of users said that only a small portion or none of the information provided by search engines is reliable and accurate, up slightly from 10 percent in 2008. *(Page 82)*

59. Trust in the Internet

Forty-two percent of respondents said they have some trust or a lot of trust in the Internet. Fourteen percent of respondents said they have no trust in the Internet. *(Page 84)*

61. TV Viewing and Time-Shifting

Time-shifting of video viewing is increasing, but only marginally. *(Page 86)*

65. Trends in Online Media Use

Internet users continue to report considerable time each week using a variety of online media, but in the current study, use of the two most popular online media declined. *(Page 88)*

66. Twitter, E-books, Internet Video, and Audio Podcasts

In several new questions for this year's Digital Future Study, Internet users were asked about their use of media that have been growing in popularity, including Twitter, e-books, and audio podcasts. Among other responses, the study found that nearly half of those who go online have used free micro-blogs such as Twitter or Facebook. However, zero percent of users said they would be willing to pay for Twitter, if the free social networking service required a fee. *(Page 89)*

68. Would You Miss The Print Edition of Your Newspaper?

While Internet users report that they devote significant amounts of time to reading online newspapers, 62 percent of users who read newspapers offline said they would miss the print edition of their newspaper if it ceased to exist -- an increase for the second year in a row. However, 22 percent of users who read newspapers said they would not miss the print edition of their newspaper, down from 24 percent in 2008. *(Page 91)*

69. Does Online Content Lead to Cancelled Print Subscriptions?

Even though large percentages of users who read newspapers would miss the print edition of the publication if it was no longer available (see the previous question), a notable percentage of Internet users -- 18 percent -- said they stopped a subscription for a newspaper or magazine because they now get the same or related content online, a decline from 22 percent in 2008. *(Page 91)*

70. Alternatives to Print Newspapers

A new question for the current Digital Future Study found that if the print edition of Internet users' newspaper stopped publishing, 59 percent would read the online edition of the publication for the same information. Only 37 percent said they would read the print edition of another newspaper if their publication ended its print edition. *(Page 92)*

79. Cell Phones and Text Messages

Text messaging by cell phone users has more than doubled in only two years; overall, cell phone users who send text messages average 38 messages per day, compared to 16 in 2007. More specifically, text messaging is almost exclusively a medium for young cell phone users; the number of messages sent per day is by far the highest among those under 18 -- 81 per day in the current study, up from 33 per day in 2007. *(Page 99)*

80. Posting Information Online: Blogs, Photos, and Maintaining Personal Web Pages

Content creation and distribution by Internet users on a blog, through a display of photos, or on a personal Web page, continues to increase substantially, while the percentage of respondents maintaining a personal Web site has remained generally stable for three years. *(Page 100)*

Consumer Behavior

84. Who Is Buying Online?

In spite of the slumping economic conditions last year, almost two-thirds (65 percent) of Internet users continue to buy online -- the same percentage as in 2008. *(Page 105)*

85. Who Is Buying Online: Light Users Vs. Heavy Users

Three-quarters of heavy users buy online -- the same percentage as in 2008. Among light users, 48 percent buy online. *(Page 105)*

87. Types of Online Purchases

The percentages of users who bought in almost every category of online purchases (such as clothes, gifts, travel, or electronics) declined in the current Digital Future Study. *(Page 107)*

88. Online Purchasing Frequency

The average number of annual online purchases for Internet users age 18 and above increased slightly in the current Digital Future study to slightly more than 35 purchases. *(Page 108)*

89. Privacy Concerns when Buying Online

Very high levels of concern about privacy and security when or if buying online have been reported in all of the studies in the Digital Future Project. Looking at the views of all respondents, the level of concern is near its peak thus far in the current Digital Future Project. *(Page 109)*

93. Would Users Reveal Personal Information In Exchange for Services or Content?

Only eight percent of users said they would be willing to reveal personal information online in exchange for extra services and content. *(Page 112)*

94. Credit Card Information: Concerns about Security

Concerns about credit card security when or if buying online have been high among all respondents in all of the Digital Future studies, but the highest levels of concern (very or extremely concerned) have been in a general decline since this question was first asked in 2001. *(Page 113)*

98. Credit Card Security: Comparing Concerns Based on Frequency of Purchasing

Although the frequency of online use relates to reduced concerns about credit card use, the number of online purchases plays only a limited role in concerns about credit card security. *(Page 117)*

99. Buying Online: Effects on Traditional Retail Purchasing

A still-large but declining percentage of online purchasers said that their purchasing online has reduced their buying in retail stores. *(Page 118)*

101. Browsing for Products: Retail Stores Vs. The Internet

Although large percentages of Internet users buy online, even larger percentages continue to use the Web as a reference service before purchasing locally. *(Page 120)*

102. Views About Risking Privacy by Going Online

The percentage of Internet users who agree that people who go online put their privacy at risk has increased. *(Page 121)*

105. Do You Click on Web Advertisements?

Internet users continue to express strong negative views about advertising online, but their negative views declined slightly in the current study. *(Page 123)*

106. Web Advertisement and Purchase Decisions

Users continue to be very unenthusiastic about making purchase decisions based on responses to Web advertisements. *(Page 123)*

107. Web Advertising: Information Value

A growing percentage of Internet users said they find Web advertising to be less informative than traditional advertising. *(Page 124)*

108. Do You Find Web Advertising Annoying?

Seventy percent of users agreed or strongly agreed with the statement, "I find Web advertising annoying," the same level as in 2008. *(Page 124)*

109. Online Advertising vs. Paying for Internet Content

Even though users express strong negative views about online advertising, a growing percentage nevertheless prefers Web ads to support Internet pages rather than personally paying for content. *(Page 125)*

Communication Patterns

I 10. How Many Americans Are Using E-mail?

Almost all respondents who go online use e-mail (96 percent), but the percentage of Internet users who use e-mail has declined slightly for the second year in a row. *(Page 127)*

I 12. Regular contact by e-mail

E-mail users maintain weekly personal e-mail contact with an average of 6.7 people in the current study, slightly lower than the 7.3 people reported in 2008 and down from the peak of 8.9 in 2006. *(Page 128)*

I 14. How Quickly Should Users Reply to Personal E-mail?

Although a slightly smaller percentage of e-mail users in the current study said they expect a quick response to their online communications, expectations about fast response to e-mails remain high. *(Page 130)*

I 16. E-mail Communication with Teachers, Government Officials, And Health Care Professionals

Growing percentages of e-mail users are going online to communicate with teachers, government officials, and health care professionals. *(Page 132)*

I 19. The Internet and Social Relationships

The percentage of Internet users who said that going online is important in helping to maintain social relationships remained constant in the current Digital Future Study. *(Page 135)*

I 20. Cell Phones and Social Relationships

More than 70 percent of cell phones users said their phone helped them to maintain their social relationships, an increase from 64 percent in 2008. *(Page 136)*

I 22. Instant Messaging and Social Relationships

Instant messaging remains one of the most frequently-used communication tools for some age groups, but looking at all respondents shows that overall, relatively small percentages of Internet users said that instant messaging is important in maintaining social relationships. *(Page 138)*

I 23. The Internet and Online Friends

Internet users report an increase in the number of online friends, an average that in the current Digital Future Study has reached a peak thus far in the project. *(Page 140)*

I 24. Friends Met Online, then Met In Person

While the number of online friends is increasing, so is the number of friends that users meet in person after initially meeting them online. *(Page 140)*

I 25. Time Spent Socializing with Friends and Family

The percentage of Internet users in the current study who said that they spend about the same amount of face-to-face time with friends since being connected to the Internet remained stable for the third year in a row (79 percent). *(Page 141)*

I 27. Are You Ignored Because of Television or the Internet?

Forty-seven percent of Internet users said they were sometimes or often ignored because another member of the household spends too much time online. An even higher percentage (50 percent) said they were ignored because others spend too much time watching TV. *(Page 143)*

I 28. Internet Use and Contact with Others

Even though users report some negative issues involving the Internet and time spent socializing in the family, they also report that Internet use has almost no effect or a positive effect on contact with the key groups in the lives of users, including family, friends, and people who share hobbies, political beliefs, religious beliefs, and professional interests. *(Page 144)*

The Recession: Internet Use during the Economic Crisis

The current Digital Future Project asked five new questions that explored Internet users' views and behavior about going online during the economic recession. In general, low percentages of users went online to communicate about the recession or to cope with tough economic times. However, a moderate percentage said that the Internet was helpful to them during the economic crisis. *(Page 145)*

I29. Going Online to Cope with the Recession

Only a small percentage of users agreed that they dealt with the economic downturn by spending more time online. *(Page 145)*

I30. The Internet: Does Information Online Help Users Better Understand the Economic Crisis?

Forty-four percent of Internet users said that information online helps them better understand the economic crisis. *(Page 146)*

I31. Do Internet Users Share Their Thoughts and Feelings about the Recession with Others Online?

Sixteen percent of Internet users share their thoughts and feelings about the current economic crisis with others online. *(Page 146)*

I32. Reaching Out to Others Online for Help During the Economic Crisis

Compared to those who say they share their views about the economic crisis with others online, fewer – 12 percent – reach out more often to others online to get help through the recession. *(Page 147)*

Social Effects: Online Communities

I34. Are You a Member of an Online Community?

Membership in an online community has remained generally stable for three years in the Digital Future Studies, increasing only marginally to 16 percent in the current study, but nevertheless a peak level in the project thus far. *(Page 149)*

I36. Membership of Online Communities

Online communities involving hobbies are joined by 49 percent of users who are members of online communities. Thirty-six percent of online community members said their community was for social purposes, while 22 percent said they were involved in communities related to their professions. *(Page 150)*

I37. Online Community Members: How Often Do They Log In?

In the current study, the online community members who said they logged into their community several times a day increased to 31 percent, a new high for the Digital Future Project. *(Page 151)*

I39. Online Communities: Are They Useful and Important?

A larger percentage of online community members in the current Digital Future study compared to 2008 said their online communities were useful and important. *(Page 153)*

I40. Participation in Online Communities: Does it Affect Involvement in Offline Communities?

Although most online community members said that their participation in those communities does not affect their involvement in offline communities, a growing percentage said that this involvement has decreased their involvement in offline communities somewhat or a lot. *(Page 154)*

I41. Online Community Members: Online Interaction

Among all online community member, 52 percent said they usually interact with other members once they are logged into their online community. *(Page 154)*

I42. Online Communities: Connection to Offline Actions

In the current study, an increasing percentage of online community members (35 percent) said they take actions offline at least monthly that are related to their online community, such as attending a meeting or seeing a doctor – up from 23 percent in 2008. *(Page 155)*

I43. Online Communities: Are They Beneficial for Members?

For the third year in a row, the percentage who find a large amount of benefit from their online community declined. *(Page 155)*

I44. Online Community Members: Do They Contribute to Building Their Communities?

A growing percentage of online community members said they contribute to the building of that community. *(Page 156)*

I45. Online Community Members: Do They Meet Members of Their Community in Person?

Half of online community members said they meet in person with members of their online communities. *(Page 156)*

Social Networking Sites

I46. Web Sites for Video Sharing or Social Networking: How Often Do You Visit?

When asked how often they visit Web sites for video sharing or social networking such as YouTube or Facebook, 58 percent of Internet users said they use these sites once a week or more – up considerably from 44 percent in 2008. *(Page 157)*

I47. Creating Content for Video Sharing or Social Networking Sites

Compared to those who visit video sharing or social networking sites, a much smaller but growing percentage of Internet users create video content for these sites. *(Page 158)*

I48. Why Do Online Community Members Visit Web Sites for Video Sharing and Social Networking?

The largest and a growing percentage of Internet users who visit social networking sites such as YouTube, and social networking Web sites such as Facebook and MySpace do so to relax or fill time. *(Page 159)*

Online Communities And Social Causes

I49. Participation In Online Communities Related to Social Causes

A very large and growing percentage of members of online communities participate in communities related to social causes. *(Page 160)*

I50. The Internet as an Information Source about Social Causes

The percentage of online community members who said the Internet helps them stay informed about social causes remains high in the current study, at 91 percent. *(Page 161).*

I51. Do Online Communities Encourage Members to Participate in Social Causes?

Seventy-one percent of online community members said they participate in social causes new to them since they became involved in online communities. *(Page 162)*

I52. Social Activism and Participation In Online Communities

A smaller percentage of users in the current Digital Future study compared to 2008 said their social activism has increased since they began participating in online communities. *(Page 163)*

I53. Has Offline Participation in Social Issues Changed because of Online Involvement?

While large percentages of online community members report that they participate in social causes online, only 12 percent said that their offline involvement in social issues has increased as a result of their online participation. *(Page 163)*

I54. Online Communities: Participation In Non-Profit Organizations

A small but growing percentage of online community members said that their participation in non-profit organizations has decreased since their Internet use began. *(Page 164)*

I55. Online Communities: Are They as Important as the Real World?

The percentage of members of online communities who feel as strongly about their online communities as they do about their real-world communities increased in the current study compared to 2008, growing to 53 percent. *(Page 165)*

Children And The Internet

I57. Internet Use: The Right Amount of Time for Children?

In the current Digital Future Study, a large and growing majority of adults said the children in their households spend the right amount of time online, or need to spend more time on the Internet. And for the first time since 2003, the percentage of adults who said that the children in their households spend too much time using the Internet has declined. *(Page 168)*

I59. Internet Use and School Grades: Children vs. Adults

Each of the Digital Future Studies has produced widely different views among children and adults about the value of the Internet for schoolwork. The current study found an even greater contrast in opinions about the value of the Internet for schoolwork. *(Page 170)*

I61. Internet Use and Television Viewing: Use As a Punishment Tool

Punishing children by denying them access to either the Internet or television has declined for the second year in a row, in both cases decreasing from peak levels reported in 2007. *(Page 172)*

I62. Children and Time Spent with Friends

For the third year in a row, 87 percent of adults said that the children in their household spend the same amount of time or more time with friends since using the Internet. *(Page 173)*

Political Power And Influence

I63. The Internet's Importance in Political Campaigns

With online technology and communication playing an increasingly visible role in American politics, respondents report the highest level of agreement with the assertion that the Internet has become important for political campaigns. *(Page 175)*

I66. Is the Internet A Tool for Political Influence?

Even though large percentages of respondents age 16 and older believe that the Internet is important in political campaigns, much smaller percentages of Americans believe that by using the Internet, public officials will care more about what people like them think. *(Page 178)*

I69. The Internet: A Tool for Understanding Politics

While low percentages of respondents age 16 and older believe that the Internet is a tool for public influence, a large and growing percentage said that going online can help people better understand politics. *(Page 180)*

I72. Does the Internet Give People More Say in What the Government Does?

Only modest percentages of respondents age 16 and older believe that the Internet gives people more say in what the government does. *(Page 182)*

I75. The Internet as a Tool to Help Gain Political Power

Thirty-one percent of respondents age 16 and older agree or strongly agree that by using the Internet, people like them can have more political power, a marginal increase over 2008. *(Page 184)*

Elections and Online Information**I79. The Internet and Information-Gathering during Election Campaigns**

The percentage of adult Internet users who went online to gather information increased significantly in the current Digital Future Study, growing to 58 percent of users, up from 37 percent in 2008. *(Page 187)*

I80. Where Do You Get Election-Related Information?

Many adult users in the current Digital Future Project accessed the four principal online sources to find information about candidates: traditional media Web sites, candidates' Web sites, Web portals such as Yahoo, and (to a much lesser extent) blogs. *(Page 188)*

I81. The Internet and Gathering Information about Candidates and Issues

Almost all adult Internet users who go online for information-gathering during an election said they sought information about issues or candidates they supported (96 percent) – an increase over the already-high figures reported in the three previous studies. *(Page 189)*

I82. Election Information Online: Satisfaction Levels

A large and growing percentage of adult Internet users who go online for election information were satisfied with what they found. *(Page 190)*

I83. Volunteering Online for Political Campaign Work

A small but growing percentage of adult Internet users said they volunteered over the Internet to work for a political candidate – four percent in the current study, up from two percent in 2008. *(Page 190)*

I84. Campaign Contributions Online

With online solicitation of campaign contributions at unprecedented levels, eight percent of adult Internet users said they contributed money to a candidate through the Internet -- an increase from five percent in 2008. *(Page 191)*

I85. Voting Online

Even after a presidential election that featured vast Internet outreach by candidates and connection to voters, a declining percentage of respondents age 16 and older want to expand their online experience to include voting. *(Page 192)*

* * * * *

The 2010 Digital Future Report

Surveying The Digital Future

Year Nine

Each year, the Digital Future Project explores more than 100 major issues in broad categories involving the impact of online technology in the United States.

This report explores only a sampling of the findings from the survey. For more detailed data, contact the Center for the Digital Future at the addresses listed at the beginning of this report.

For trends and issues in this year's findings, see page 193.

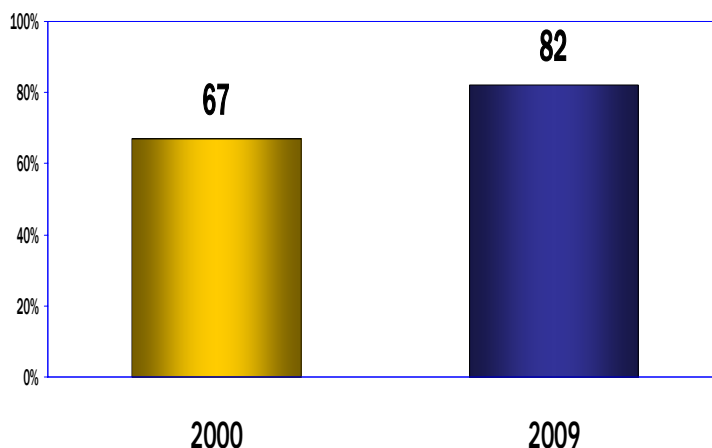
A Decade of Exploring the Digital Realm

Ten Comparisons of Internet Views and Behavior: 2000 vs. 2009

Internet use in America was already well-established in the United States when the first Digital Future Study was conducted in 2000, becoming the first longitudinal study of the views and behavior of Internet users and non-users in the United States. That early broad use of technology did not result in unchanging views and actions; our annual national surveys over the past decade identified – and continue to identify -- profound changes in the adoption and use of the Internet, as well as what users and non-users think about the digital realm.

Here are 10 examples comparing views and behavior in 2000 and in 2009; more details on each issue are explored later in this report.

Overall Internet Use: 2000 vs. 2009

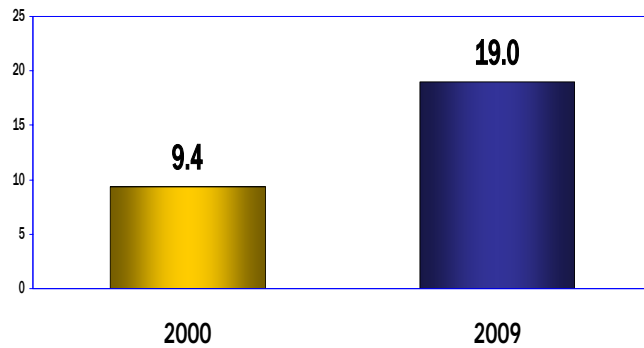


Internet Use in the United States

In 2000, six years after the portals of the Web were opened to public use, more than two-thirds of Americans were Internet users. That percentage surpassed 70 percent in 2001 and 75 percent in 2003, and reached 80 percent in 2008. The current Digital Future Study reported that 82 percent of Americans now go online – the highest level thus far. (*See page 35*)

A Decade of Exploring the Digital Realm

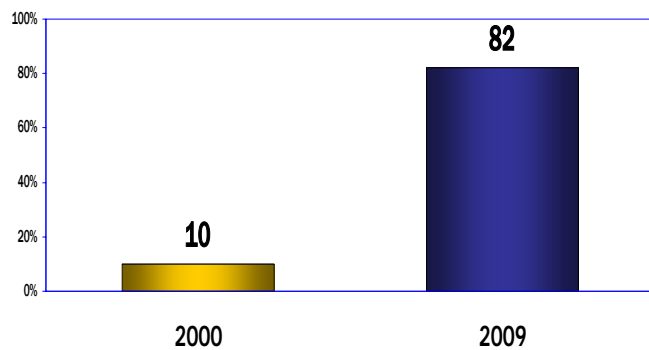
Hours Per Week Online



Hours Per Week Online

In 2000, Internet users went online an average of 9.4 hours per week, a figure that has more than doubled in the current Digital Future Study – now 19 hours. Of particular interest: even though Internet use has been a regular habit since the mid-1990s, the largest year-to-year increases in weekly hours online have been reported in the two most recent years of the Digital Future Studies. *(See page 39)*

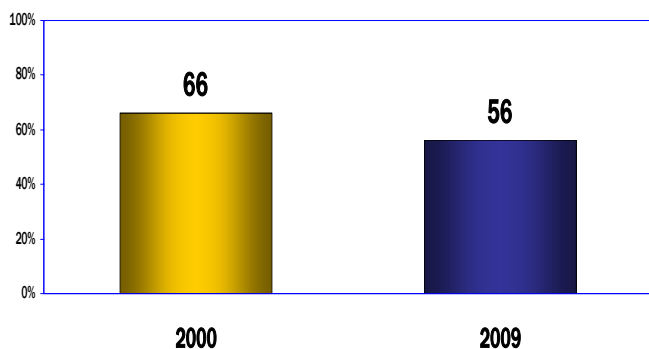
**Broadband Access at Home
(Percentage of Users)**



Internet Connection at Home by Broadband

Access to the Internet at home through a broadband connection was almost non-existent in 2000; only 10 percent of users chose to pay for a fast, always-on link as an alternative to access through a telephone modem. On a steady increase in every year of the Digital Future Project, broadband is now used by more than 80 percent of Internet users. *(See page 51)*

**Internet Users Who Say Communications
Technology Makes the World a Better Place**

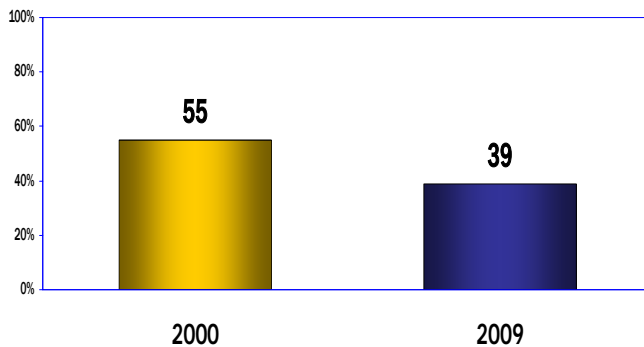


**Communication Technology:
How Does it Affect the World?**

In 2000, 66 percent of Internet users said communication technology makes the world a better place. That percentage has risen and fallen modestly over the last decade, but the percentage this year has now declined to 56 percent of users – the lowest level thus far in the Digital Future Project. *(See page 58)*

A Decade of Exploring the Digital Realm

Internet Users Who Say Most or All Information Online is Reliable

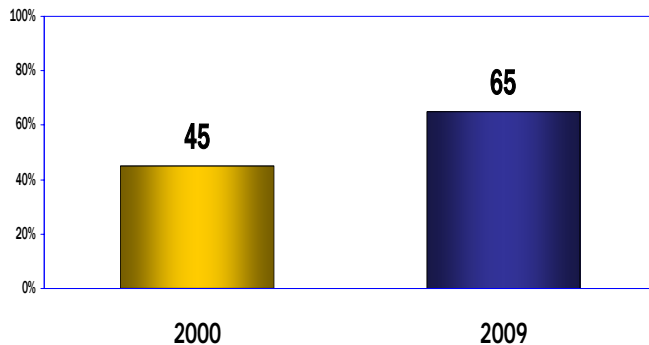


71)

Information Online: Is it Reliable?

Nearly 80 percent of Web users rely on the Internet as an important source of information (*see page 67*), but a much smaller percentage of those users believe that the online information is reliable – and that percentage continues to decline. In 2000, 55 percent of users said that most or all of online information is reliable; in the current study, 39 percent had the same response – a new low level for the Digital Future Project. (*See page*

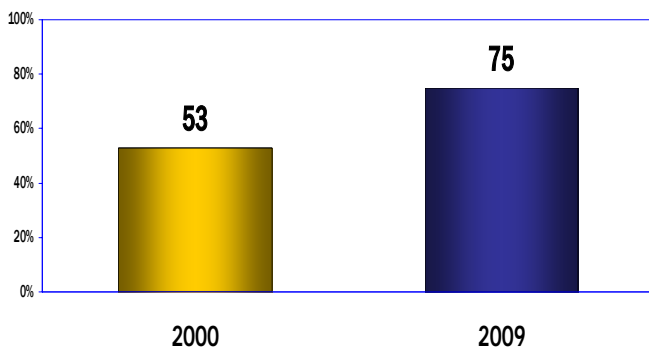
Percentage of Internet Users Who Buy Online



Who is Buying Online?

Almost half of Internet users (45 percent) were buying online in 2000. In spite of the economic recession last year, almost two-thirds (65 percent) of Internet users now buy online. (*See page 105*)

Internet Purchasers Who Browse in Retail and Then Buy Online



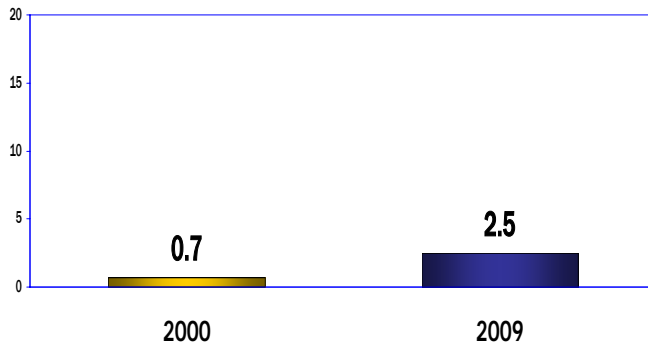
Browsing in Stores, then Buying Online

The Internet became competition for traditional brick-and-mortar retail stores as soon as products began to sell online. In 2000, 53 percent of users said they browsed in retail stores and then bought online; in the current Digital Future Study, that figure has grown substantially to 75 percent of users who browse in stores and then buy online. But traditional retail also gains from Internet use; although large percentages of

Internet users buy online (*see page 105*), even larger percentages continue to use the Web as a browsing reference before they purchase at local retail stores. (*See page 120*)

A Decade of Exploring the Digital Realm

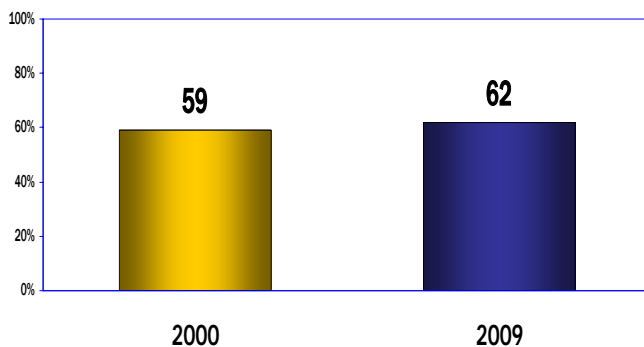
Online Friends Met in Person



Online Friends Become In-Person Friends

Internet users in 2000 reported an average of less than one person who they originally connected with online and then later met in person. Since then, the average has risen steadily, and in the current Digital Future Study has reached 2.5 friends originally met online who are now known in person – a high for the studies. (See page 140)

Internet Users Who are Not Likely to Go Online in the Next Year

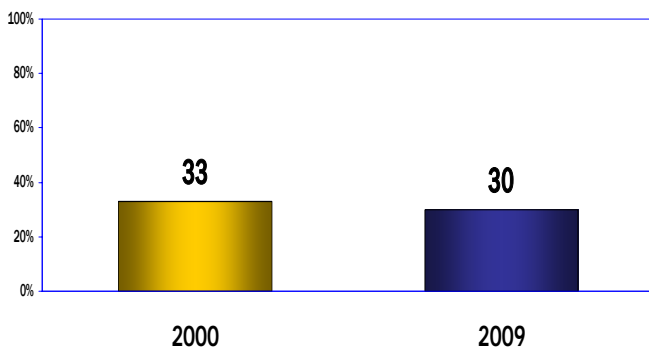


Will Internet Non-Users Go Online?

Not all of the findings in 10 years of Digital Future Studies represent large changes in opinion or behavior. For example, although the percentage of Internet non-users continues to shrink – now only 18 percent of Americans – the percentage who say they are not likely to go online in the next year has remained remarkably consistent over the decade, fluctuating only a few

percentage points to its current 62 percent figure – compared to 59 percent in the first study. (See page 65)

Internet Non-Users Who Don't Go Online Because They Have "No Interest" or the Internet is "Not Useful"



Non-Users: Reasons for not Going Online

Before 2008, the reason most cited by non-users for not going online was "no computer" or "no Internet connection." Since then, however, the reason for not going online most reported by non-users is "no interest" or "not useful," mentioned by 30 percent of non-users in the two most recent studies, compared to 33 percent in 2000. This response is a reminder that although the

Internet is considered indispensable by the 82 percent of Americans who are users, the primary reason why the other 18 percent do not go online is they consider the Internet unnecessary in their lives. (See page 62)

Internet Users And Non-Users

Who Is Online? Who Is Not? What Are Users Doing Online?

During a decade of evolving Internet use, how have behavior and views about going online changed among Internet users and non-users in the United States?

In what ways do the opinions and actions of “light users” (5 hours or less per week using the Internet) and “heavy users” (more than 24 hours per week using the Internet) differ?

* * * * *

Internet Access And Use

Project Year	2000	2001	2002	2003	2005	2006	2007	2008	2009
--------------	------	------	------	------	------	------	------	------	------

Internet Access

Overall Internet Use

% of Americans who are Internet users	67	72	71	76	79	78	79	80	82
--	----	----	----	----	----	----	----	----	----

Hours Online

Average numbers of hours online per week	9.4	9.8	11.1	12.5	13.3	14.0	15.3	17.3	19.0
---	-----	-----	------	------	------	------	------	------	------

Average number of hours online at home per week	3.3	5.9	6.8	6.9	7.8	8.9	10.0	10.1	10.6
--	-----	-----	-----	-----	-----	-----	------	------	------

Hours online per week from home, Year Nine (light users)*									2.0
--	--	--	--	--	--	--	--	--	-----

Hours online per week from home, Year Nine (heavy users)**									22.0
---	--	--	--	--	--	--	--	--	------

* "light users" = 5 hours or less per week using the Internet

** "heavy users" = more than 24 hours per week on the Internet

The Internet at Work

% of Internet Users at Work	n/a	n/a	n/a	10.8	10.7	10.5	11	11.6	12.9
-----------------------------	-----	-----	-----	------	------	------	----	------	------

Internet at Work, Active Use, Hours per week	n/a	4.6	5.5	4.9	5.6	7.8	7.4	8.3	9.0
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Project Year	2000	2001	2002	2003	2005	2006	2007	2008	2009
--------------	------	------	------	------	------	------	------	------	------

Online Purchasers

% of Internet users who buy online	45	51	40	43	46	51	67	65	65
Average number of annual purchases (online purchasers)	n/a	10.8	28.3	29.9	34.6	30.1	36.4	34.1	35.2

Top 10 Most Popular Online Purchases (Users Who Have Purchased Online)

■ Books	59%
■ Clothes	59%
■ Gifts	55%
■ Travel	53%
■ Electronics/Appliances	47%
■ Videos/DVDs	46%
■ Computers/Peripherals	41%
■ Software/Games	40%
■ CDs	40%
■ Products for Hobbies	38%

America On The Internet

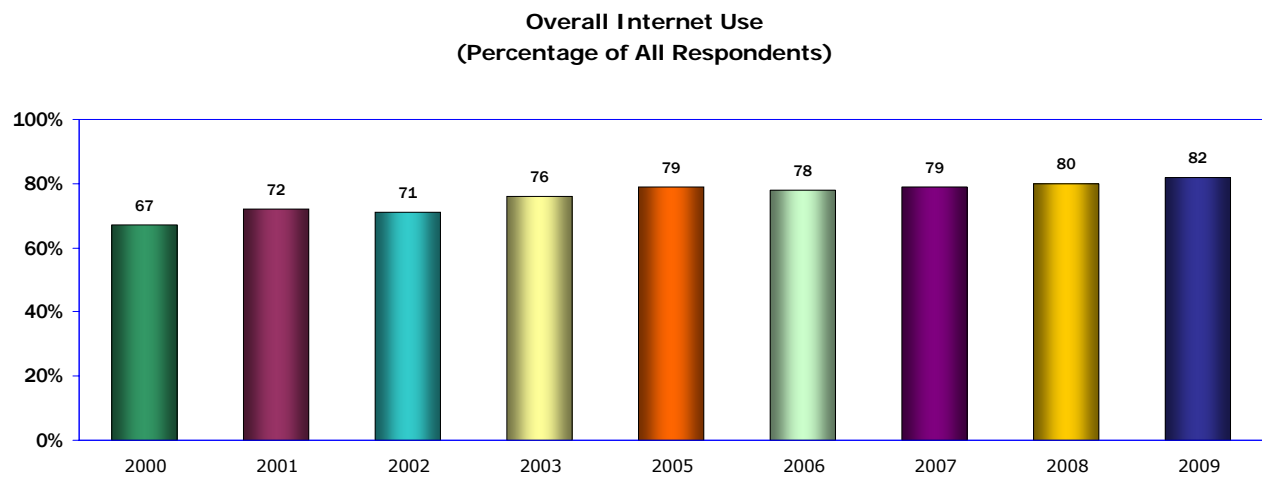
<i>Americans who are Internet users</i>		82%
<i>Internet users: average years online</i>		10.8
<i>Average hours per week online</i>		19
<i>Homes with at least three computers</i>		28%
<i>Wireless Internet at home (with laptops)</i>		79%
<i>Internet connection by broadband</i>	2000	10%
	2009	82%
<i>Internet users who keep a blog</i>	2003	3%
	2009	35%
<i>Does new communications technology make the world a better place?</i>		
<i>(Internet users who said yes)</i>	2000	66%
	2009	56%

I. Internet Use in the United States

For the first time in the decade of studies conducted by the Digital Future Project, Internet use has surpassed 80 percent of Americans – now 82 percent.

Less than 20 percent of Americans are not Internet users.

This new high percentage of Internet use contrasts to the slightly more than two-thirds of Americans (67 percent) ten years ago. And, in 1994, when public Web sites became generally available to the American public, approximately 15 percent of people in the United States were Internet users.*

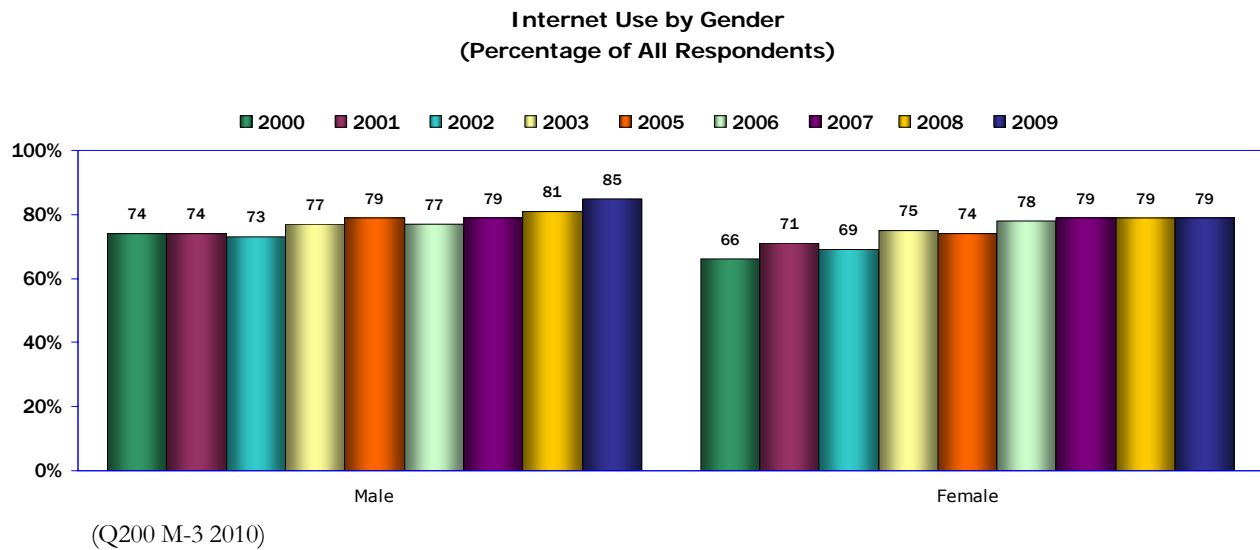


(Q200 M-1 2010)

* Percentage based on studies conducted by several federal agencies and academic organizations.

2. Internet Users: Men and Women

High percentages of both men and women go online. However, in the current Digital Future Project, the gap between men and women as Internet users (six percent) is the largest since the first year of the Digital Future Project.



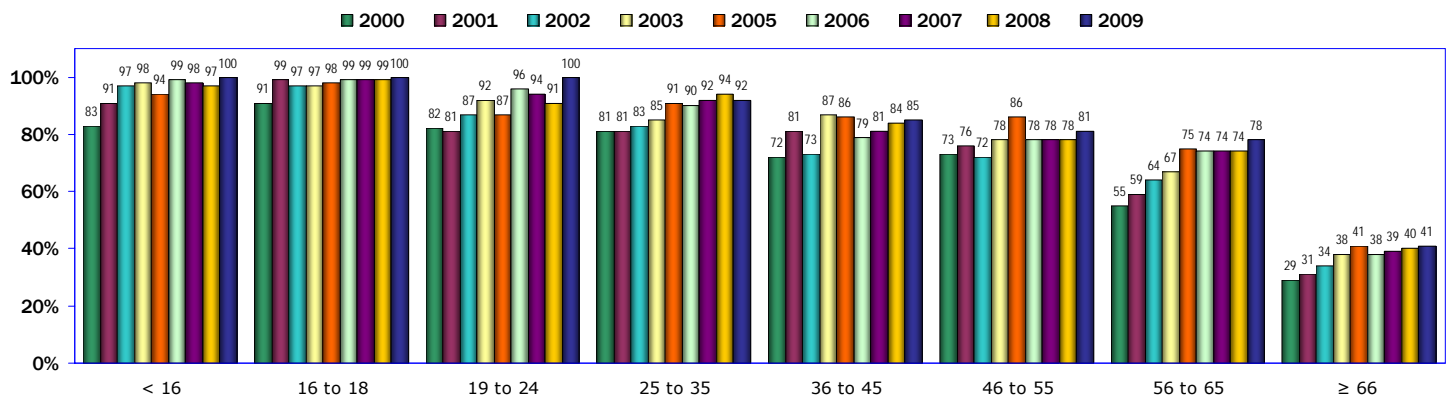
3. Internet Use and Age

Not surprisingly, Internet use continues to increase as age decreases. In the current study, 100 percent of respondents age 24 or under use the Internet.

Even though online access has been generally available since 1994, a surprisingly high percentage of Americans between 36 and 55 -- those who most likely would have been early adopters of technology -- are not Internet users. Among respondents 46-55, 19 percent do not go online, while 15 percent of respondents 36 to 45 are not Internet users.

Among the oldest respondents, Internet use is still low compared to other age groups, but it has reached 41 percent.

Internet Use by Age
(Percentage of All Respondents)



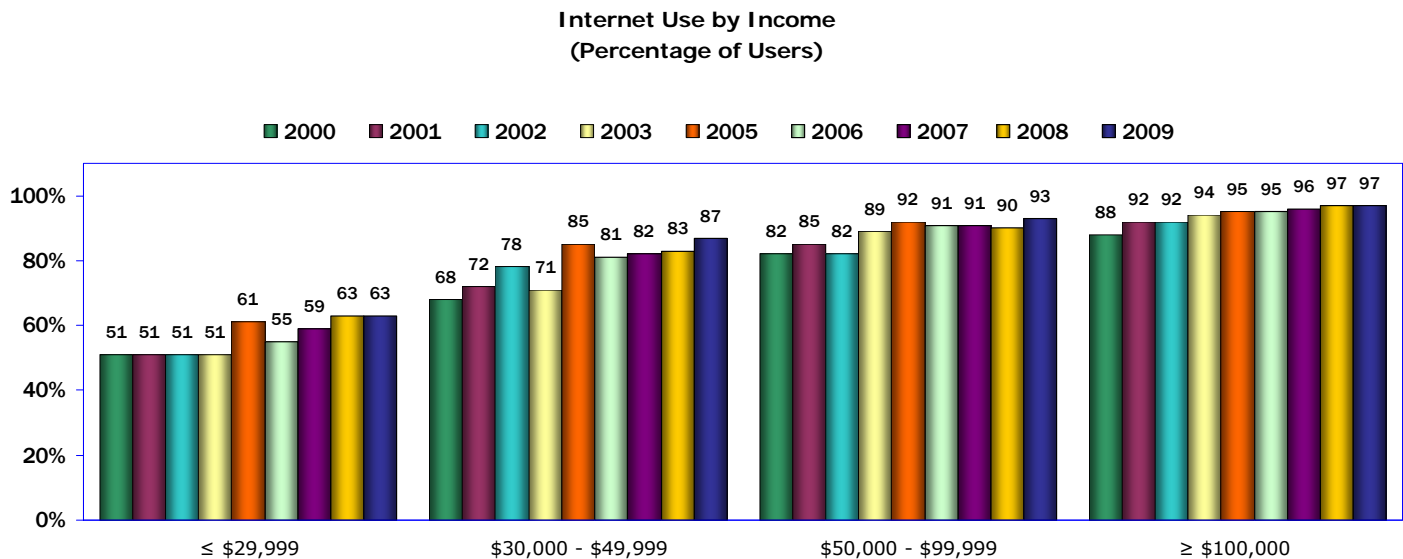
(Q200 M-4 2010)

4. Internet Use and Income

Even though the expense of using the Internet is cited by only 11 percent of non-users as a reason for not going online, the Digital Future Project continues to find that Internet use has a strong relationship with income.

In households with income of \$100,000 a year or more, virtually all respondents (97 percent) use the Internet. Conversely, in households with income of less than \$30,000 a year, only 63 percent of respondents are Internet users. However, this figure still represents a substantial increase over a decade ago, when the first Digital Future Study, when slightly more than half of respondents in this income bracket went online (51 percent).

Also of note is the second-lowest income category – the respondents with incomes \$30,000 to less than \$50,000, of whom 87 percent are Internet users.

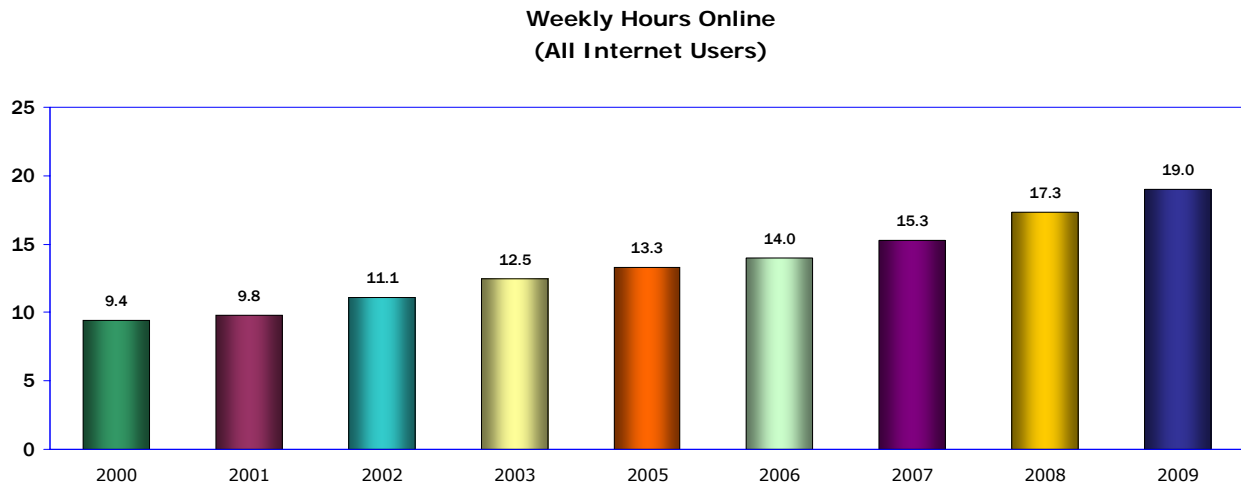


(Q200 M-3 2010)

5. Hours per Week Online

The amount of time that Internet users spend online has grown in each year of the Digital Future studies, and has now reached an average of 19 hours per week.

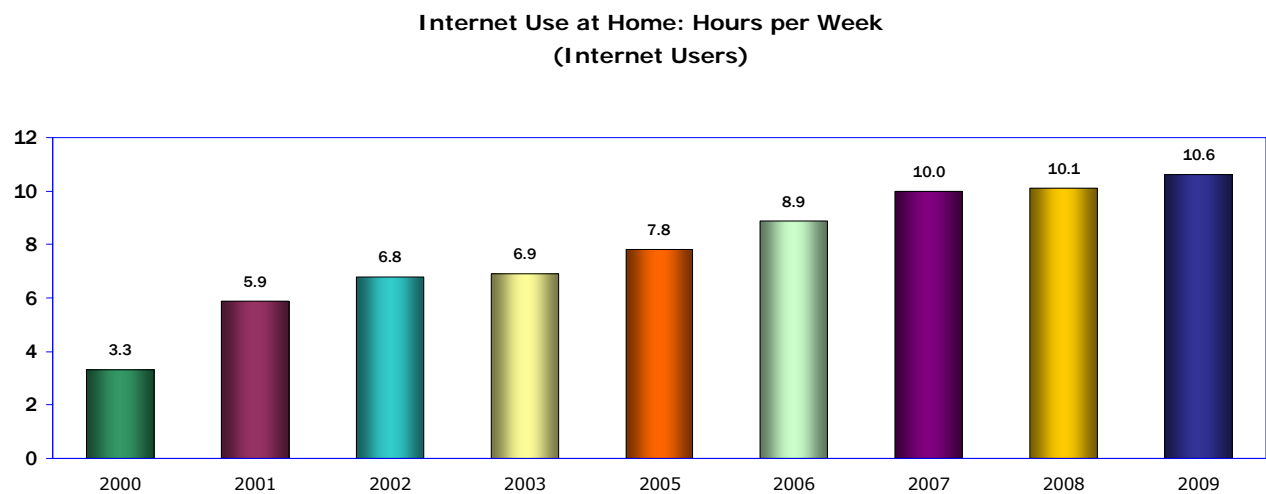
Notably, even though more than two-thirds of Americans have gone online for a decade, the largest year-to-year increases in weekly online use have been reported in the two most recent Digital Future Studies.



(Weekly Hours M-1 Compilation 2010x)

6. Using the Internet at Home: Hours per Week

Internet use at home has increased in every year of the Digital Future Project, and now averages 10.6 hours per week.



(Q350 M-1 2010)

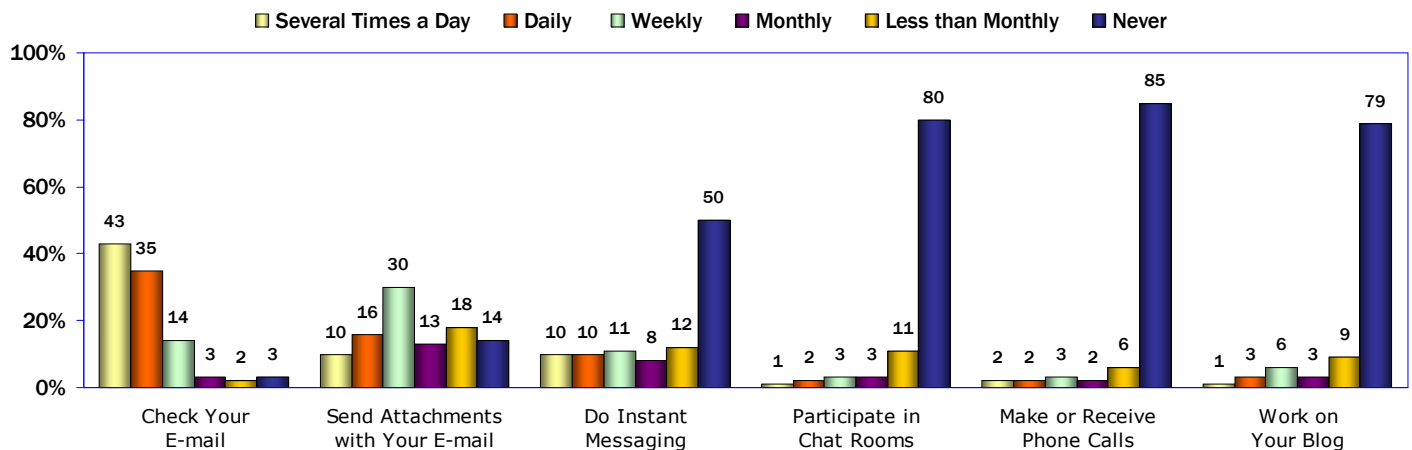
7. Activities on the Internet: Communication

Users frequently go online for a variety of communications activities, but a notable percentage of users do not participate in more recently-developed Internet applications.

In the current Digital Future Project, 78 percent of Internet users said they check their e-mail daily or more (defined as once a day or several times a day). More than one-quarter of users said they send attachments with their e-mail daily or more, and 20 percent send instant messages at least daily.

But large percentages of Internet users never go online to do instant messaging (50 percent), work on a blog (79 percent), participate in chat rooms (80 percent), or make or receive phone calls (85 percent).

Internet Activities: Communications
(Percentage of Internet Users)



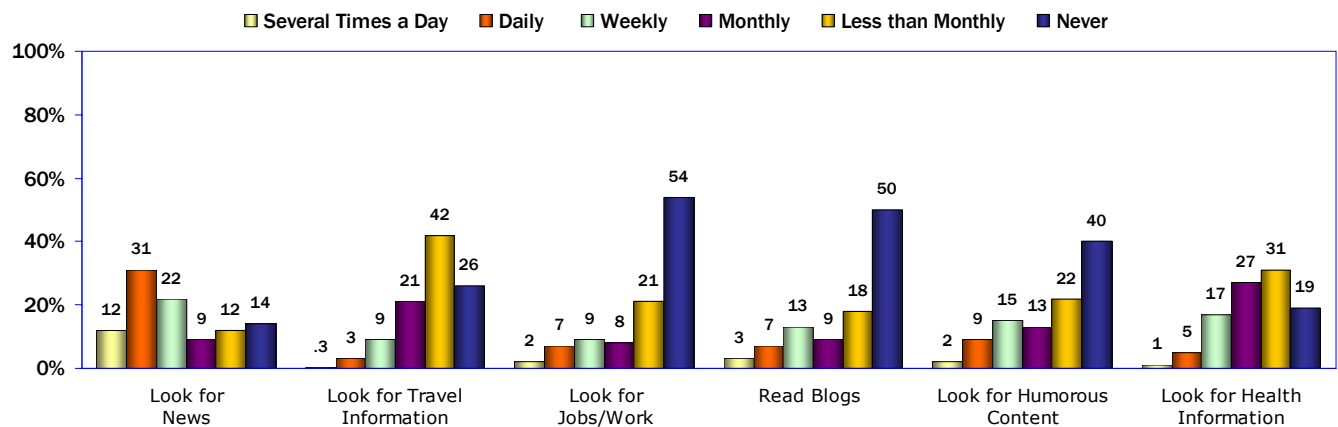
(Q708a M-1 2010)

8. Activities on the Internet: Information-Gathering

Sixty-five percent of Internet users look for news online at least weekly (several times a day, daily, or weekly), and 12 percent look for travel information with the same frequency.

Also going online at least weekly are twenty-six percent who look for jokes, cartoons, or other humorous content; 23 percent who read blogs or health information, and 18 percent who look for jobs.

Internet Activities: Information-Gathering
(Percentage of Internet Users)



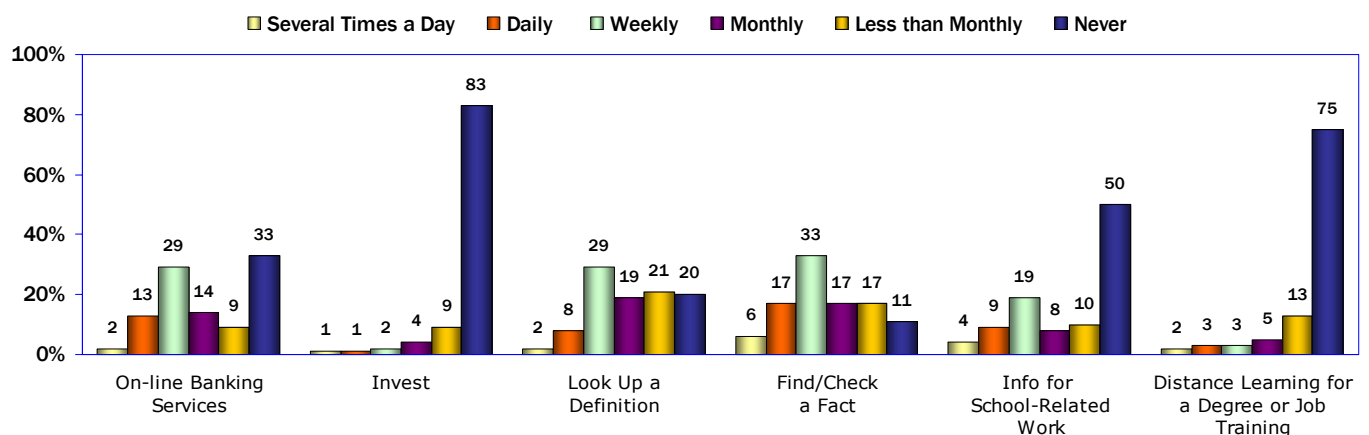
(Q708B M-1 2010)

9. Activities on the Internet: Finances, Fact-Finding, Education

Forty-four percent of Internet users access online banking or other financial services at least weekly, but only a small percentage (4 percent) go online several times a day, daily, or weekly to invest.

Fifty-six percent of Internet users go online at least weekly for fact-finding, while 39 percent look up the definition of a word at the same frequency.

Internet Activities: Finances, Travel, Product Information
(Percentage of Internet Users)

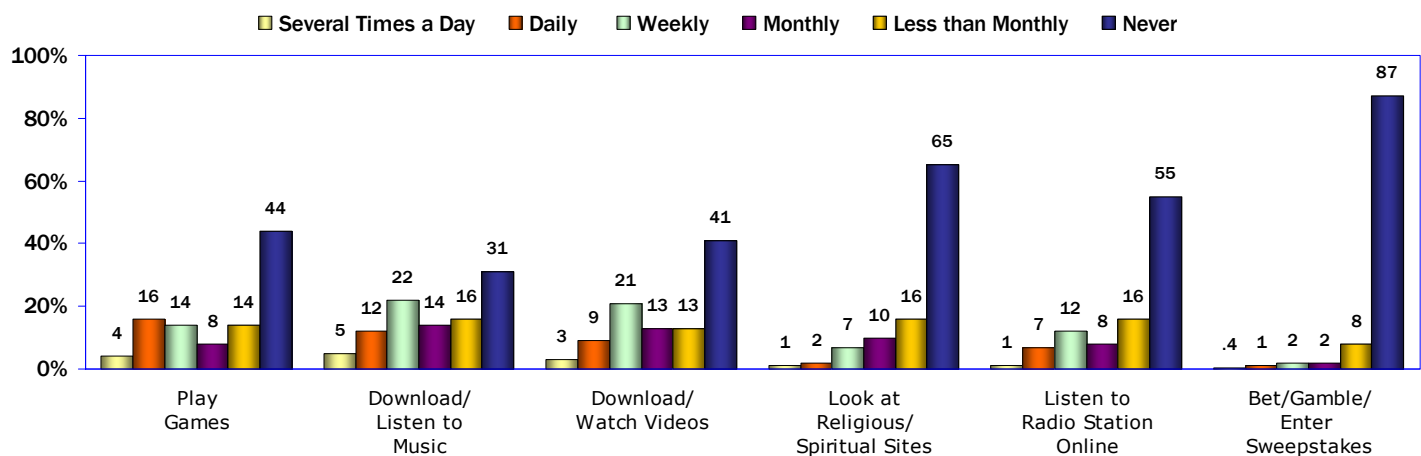


(Q708E M-1 2010)

10. Activities on the Internet: General Use

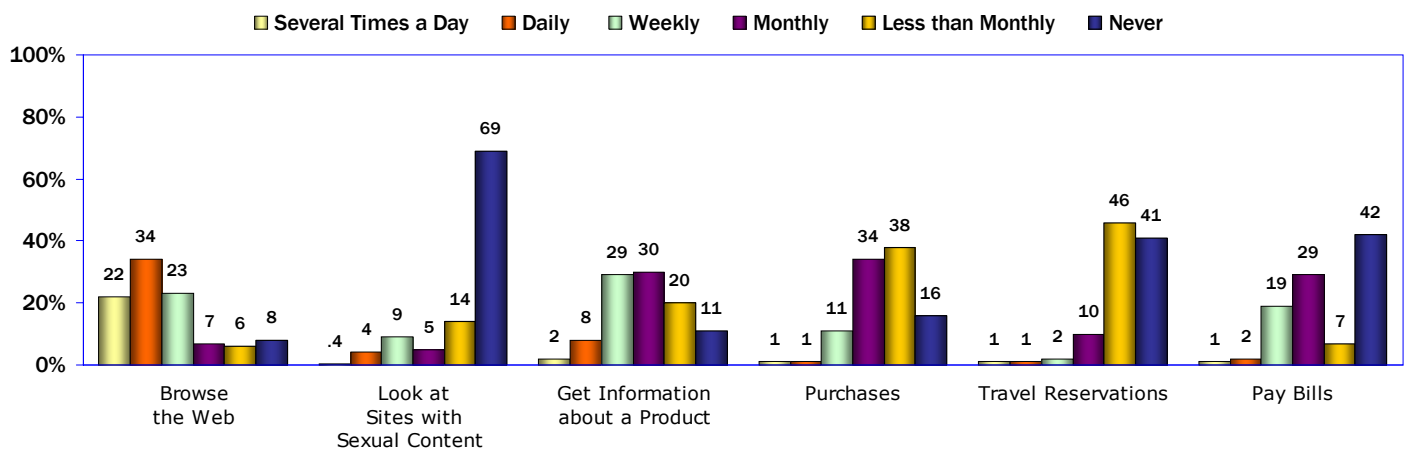
Looking at a range of other online activities, users report going on the Internet at least weekly (several times a day, daily, or weekly) to browse the Web (79 percent), get product information (39 percent), download or listen to music (39 percent), play games (34 percent), download or watch videos (33 percent), pay bills (22 percent), listen to online radio stations (20 percent), make travel reservations (4 percent), make purchases (13 percent), look at sexual content (13 percent), look at religious sites (10 percent), and gamble (3 percent).

General Internet Activities
(Percentage of Internet Users)



(Q708C M-1 2010)

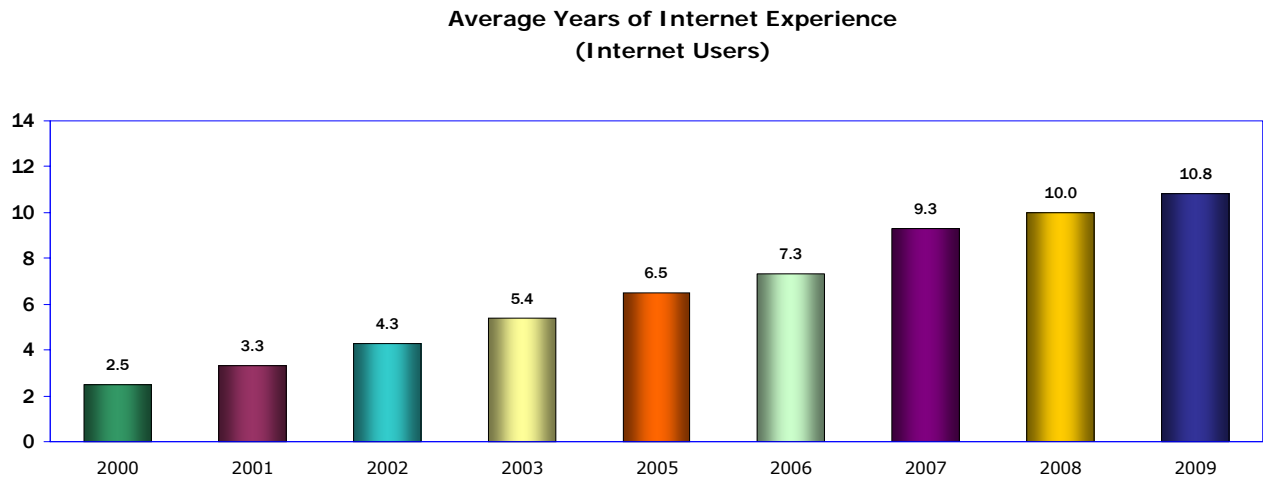
General Internet Activities
(Percentage of Internet Users)



(Q708D M-1 2010) (Data is for all users except for those who look at sites with sexual content, which is users age 18 or older.)

11. Internet Use: How Many Years?

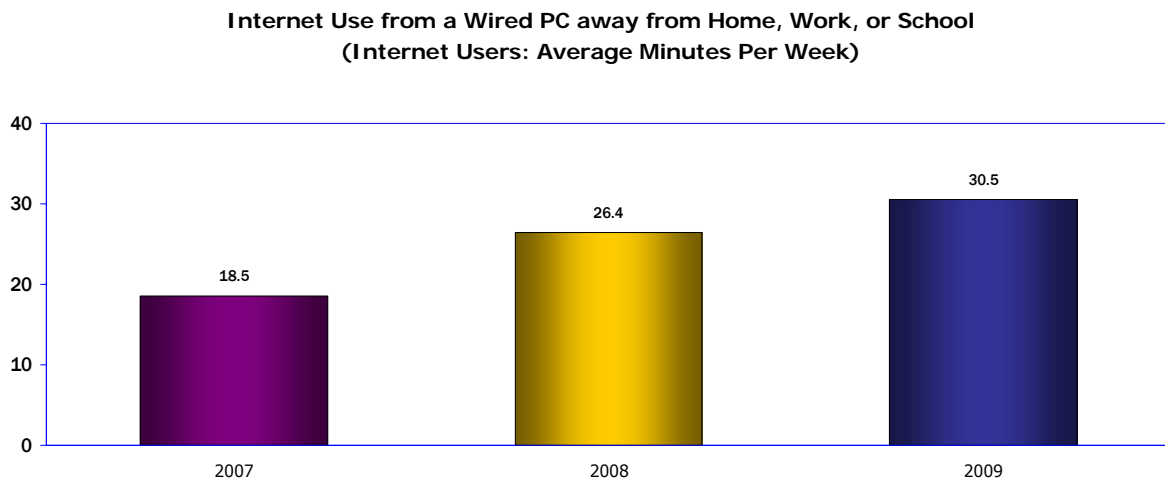
Internet users in the current Digital Future Study now report an average of more than a decade of online use.



(Q210 M-2 2010)

12. Internet Use from a Wired PC away from Home, Work, or School

Use of the Internet from a wired PC away from home, work, or school continued to grow in the current Digital Future Study. Internet use increased to more than a half-hour per week (30.5 minutes) from locations where they used wired PCs, such as libraries, other people's homes, or Internet cafes.



(Q412 JC-1 2010)

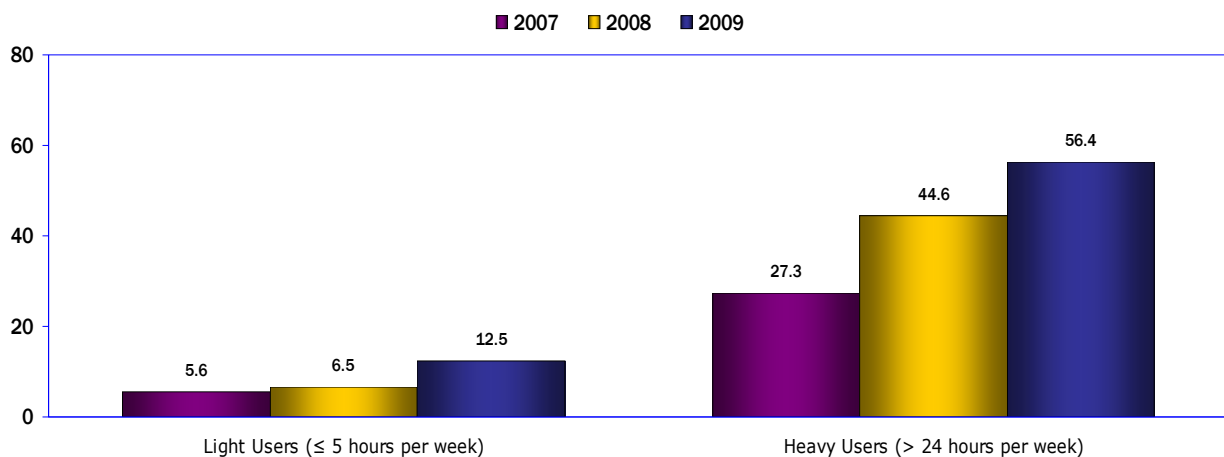
13. Internet Use with a Wired PC away from Home or Work: Light Users vs. Heavy Users

Heavy Internet users in the current Digital Future Project report a large increase in online time on a wired PC away from home, work, or school -- more than double the time per week that was reported two years ago.

Heavy users report nearly an hour per week of Internet use from a wired PC away from home, work or school (56.4 minutes), compared to only 27.3 minutes in 2007.

Although light users go online away from home, work, or school much less than heavy users, they nevertheless report an increase of nearly double the number of minutes over 2008 (12.5 minutes compared to 6.5 minutes).

**Internet Use from a Wired PC away from Home, Work, or School
(Average Minutes Per Week)**



(Q412 JC-2 2010)

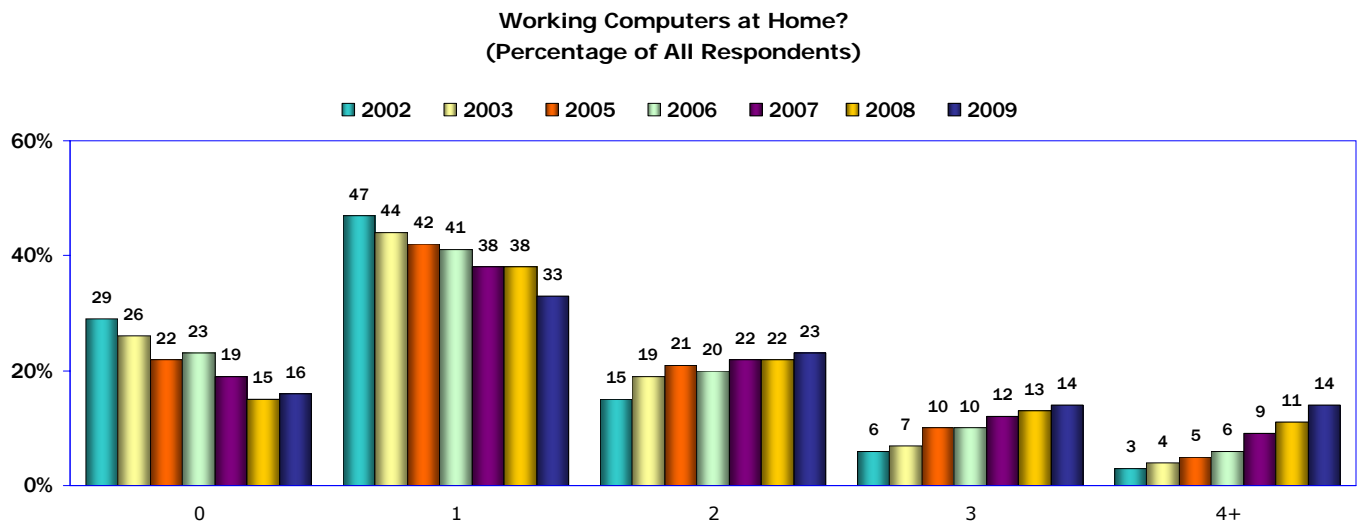
14. Working Computers in the Home

Multiple computer ownership continues to be a growing trend.

The percentage of respondents with only one computer in their household remains in an overall seven-year decline, and the number who report two or more continues to grow.

In the current study, more than half of respondents (51 percent) said they own two or more computers; of those, 28 percent own three or more computers.

The largest overall growth in computer ownership was reported by respondents with four or more computers, increasing to 14 percent of respondents -- up from only three percent in 2002.



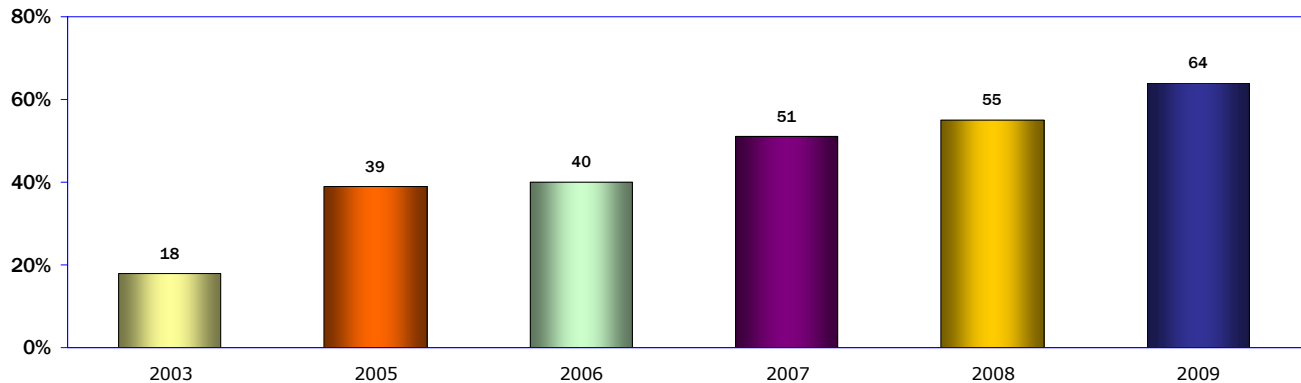
(Q130 JC-1 2010)

(Responses do not include PDAs, video games, Web TV, cell phones, or other electronic devices).

15. Laptop Ownership

In 2003, only 18 percent of respondents to the Digital Future Study owned a laptop computer, but since then the number has grown substantially, surpassing half of respondents in 2007 and increasing to nearly two-thirds (64 percent) in the current study.

Laptop Ownership at Home
(Respondents with One or More Computers at Home)

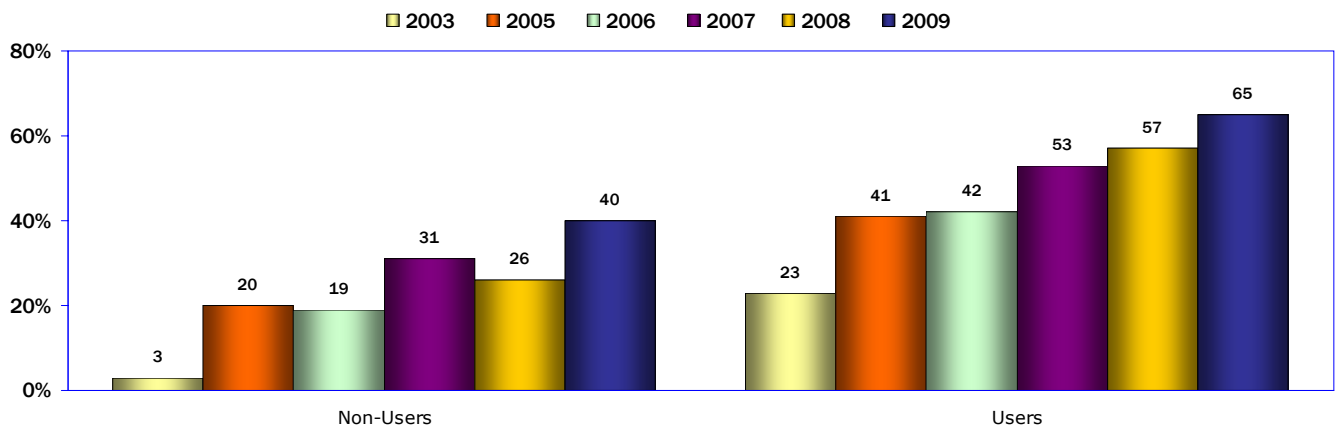


(Q134 JC-2 2010)

16. Laptop Ownership: Non-users vs. Users

The percentage of households with Internet users that have a laptop continues to increase -- in the current study to 65 percent, an increase from 57 percent over 2008. Of particular note, however, is the surprisingly high percentage of Internet non-users who use laptops: 40 percent in the current study, up from 26 percent in 2008.

Laptop Ownership at Home
(Respondents with One or More Computers at Home: Internet Non-Users Vs. Users)

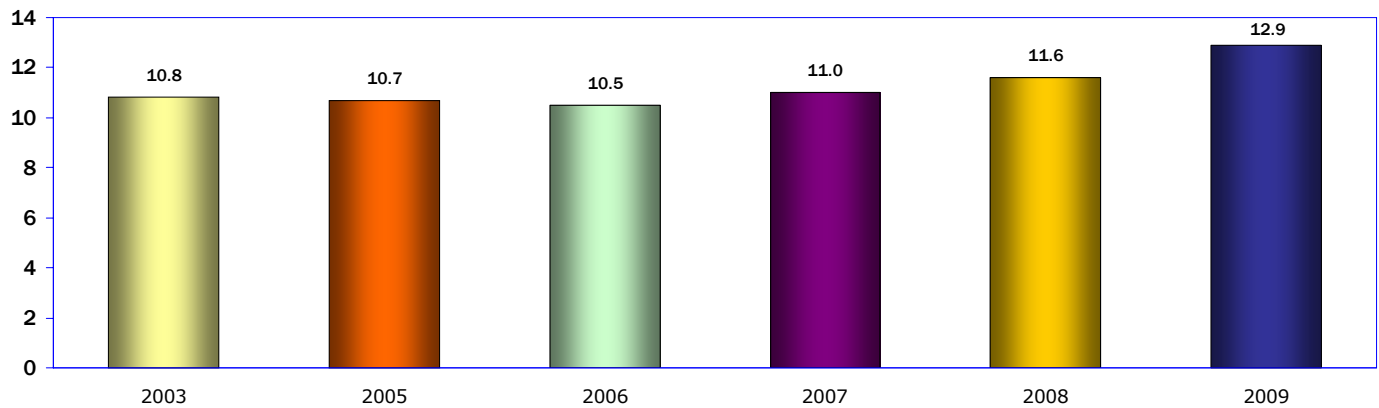


(Q134 JC-4 2010)

17. The Internet at Work

The number of hours that Internet users are online at work increased for the third year in a row in the Digital Future Project, and has now reached a new peak at 12.9 hours per week.

**Internet Use at Work, Average Hours per Week, Not at Home
(Internet Users Who are Employed)**

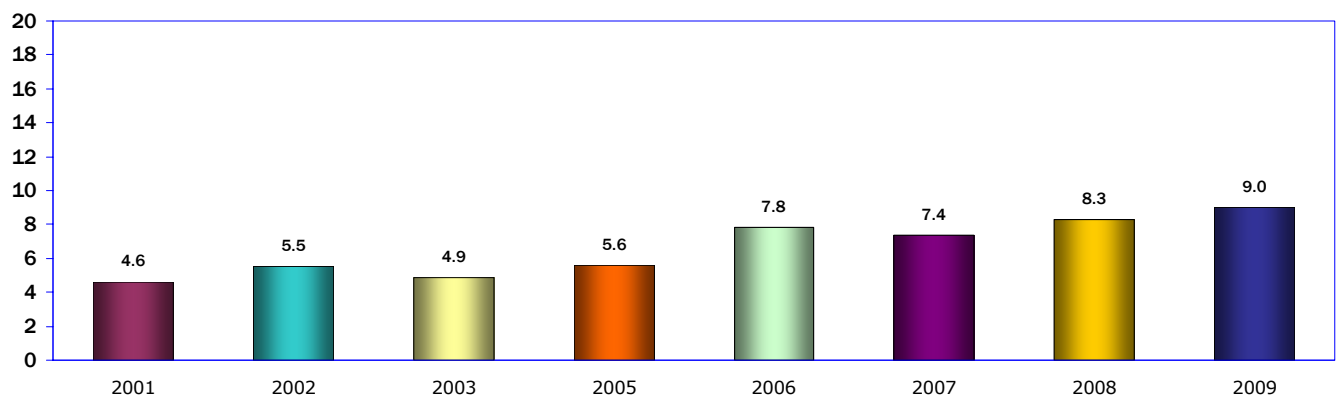


(Q370 M-2 2010)

18. The Internet at Work: Active Use

Internet users report that they are actively going online nine hours per week at work on average – a significant increase for the second straight year and the highest level thus far in the Digital Future Project.

**Internet Use at Work, Average Hours per Week of Active Online Use
(Internet Users Who Access the Internet at Work)**



(Q400 M-1 2010)

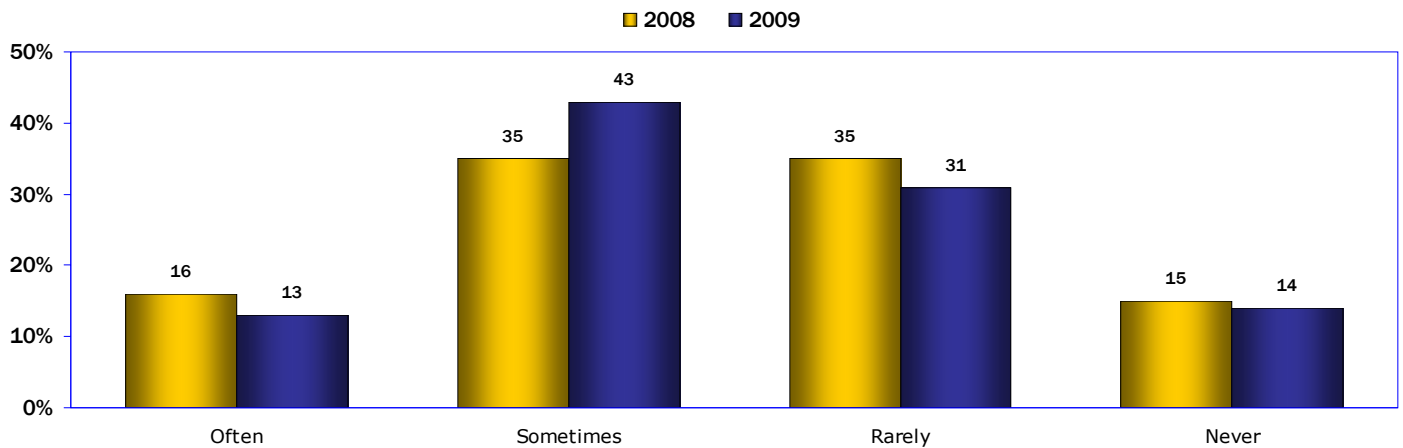
19. The Internet at Work: Non-Work Activities

An increasing percentage of users who go online at work said they use the Internet for non-work related reasons, among them general Web surfing, chatting, instant messaging, and reading and writing e-mails.

Fifty-six percent of users who go online at work said they sometimes or often go online for non-work related reasons, up from 51 percent in 2008.

Fourteen percent of respondents in the current study who go online at work said they never go online for non-work purposes, down marginally from 15 percent in 2008.

Do You Go Online at Work for Non-Work Activities?
(Internet Users Age 16 and Older Who Use the Internet at Work)



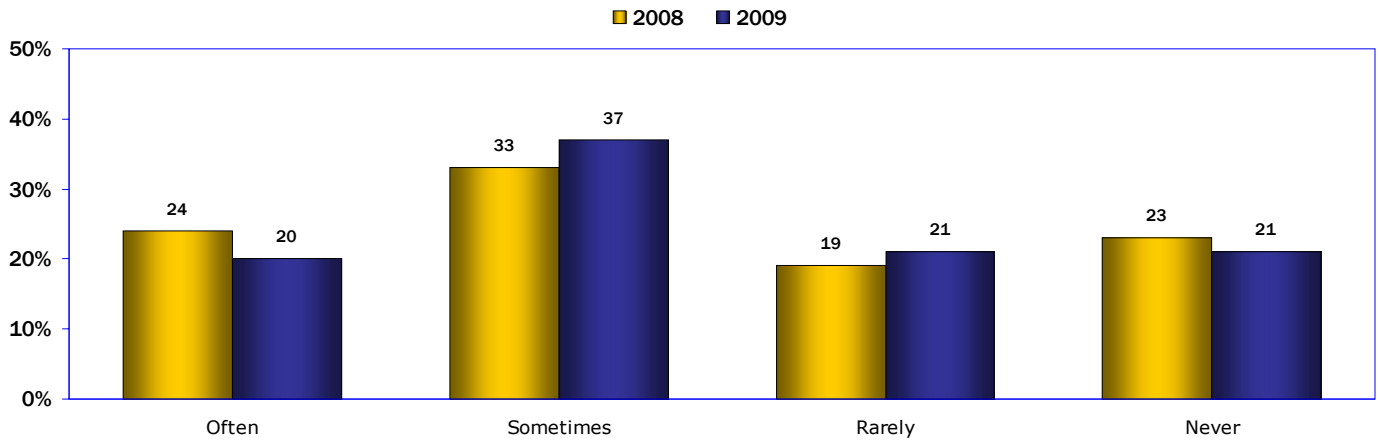
(Q493 M-1 2010)

20. Using the Internet at Home for Work

A large but flat percentage of Internet users who go online at work said they also go online at home for their jobs.

In the current study, 57 percent of respondents who use the Internet at work said they sometimes or often go online at home for their jobs – the same percentage as in 2008.

**How Often Do You Use the Internet at Home for Your Job?
(Internet Users Age 16 and Older Who Use Internet at Work)**



(Q494 M-1 2010)

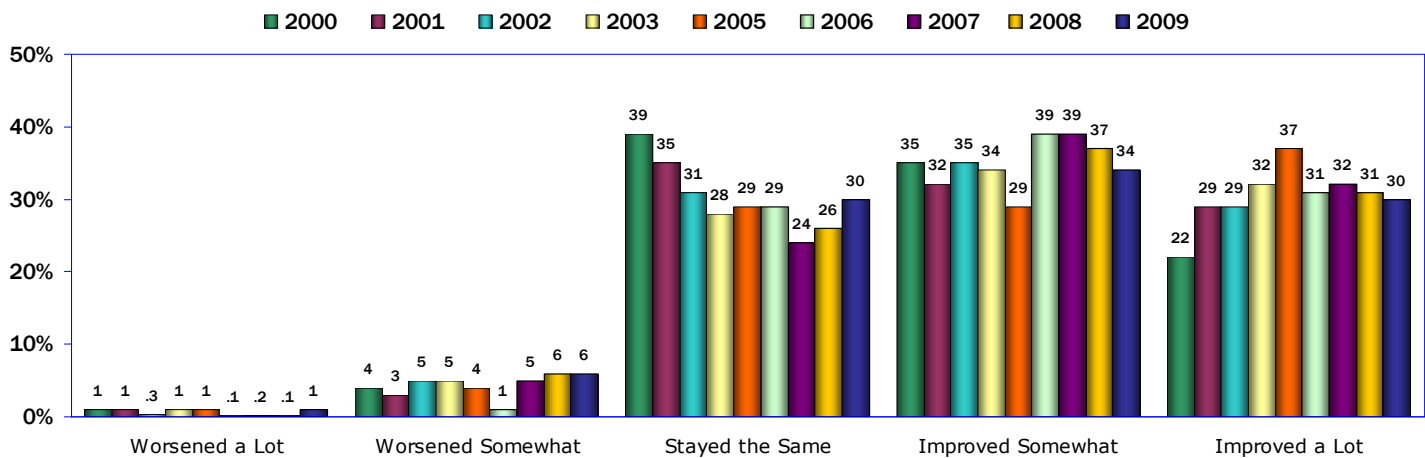
21. Productivity and the Internet at Work

The percentage of users who said the Internet at work makes them more productive remains high, but nevertheless continued to decline from previous years.

Sixty-four percent of users who go online for their jobs said that Internet access at work improves their productivity somewhat or a lot – down from 68 percent in 2008 and 71 percent in 2007.

The small percentage of users who said that Internet access at work has worsened their productivity has stayed generally the same over most of the years of the Digital Future Project: seven percent of users in the current study said their productivity has worsened somewhat or a lot.

Internet Access at Work: Views about Performance and Productivity
(Percentage of Internet Users Age 16 and Older Who Use the Internet at Work)



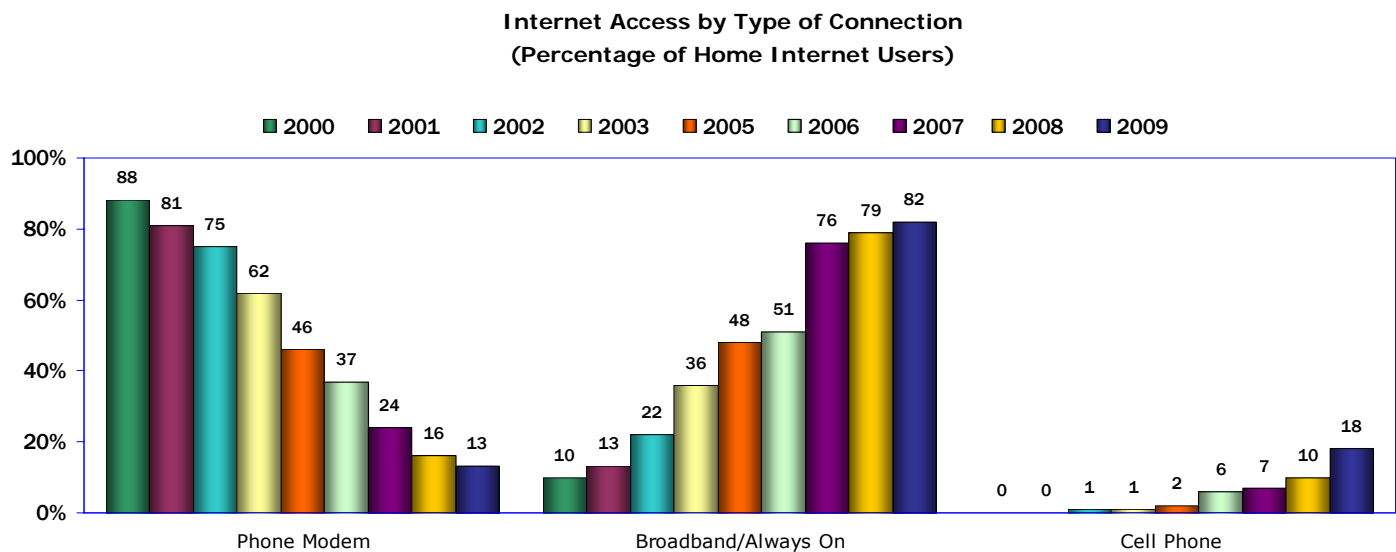
(Q491 M-2 2010)

22. Internet Connection at Home: Modem, Broadband, Cell Phone

Internet access through a broadband connection has increased in every year of the Digital Future Project, and has now surpassed 80 percent of Internet users -- up from only 10 percent in 2000.

In the current study, cell phone access nearly doubled over 2008 (now 18 percent), while phone modem access has reached a new low (13 percent). For the first time in the Digital Future Project, more users accessed the Internet through their cell phones than through a telephone modem.

(Note: broadband is defined as cable modem, DSL, ISDN or T1/T3.)



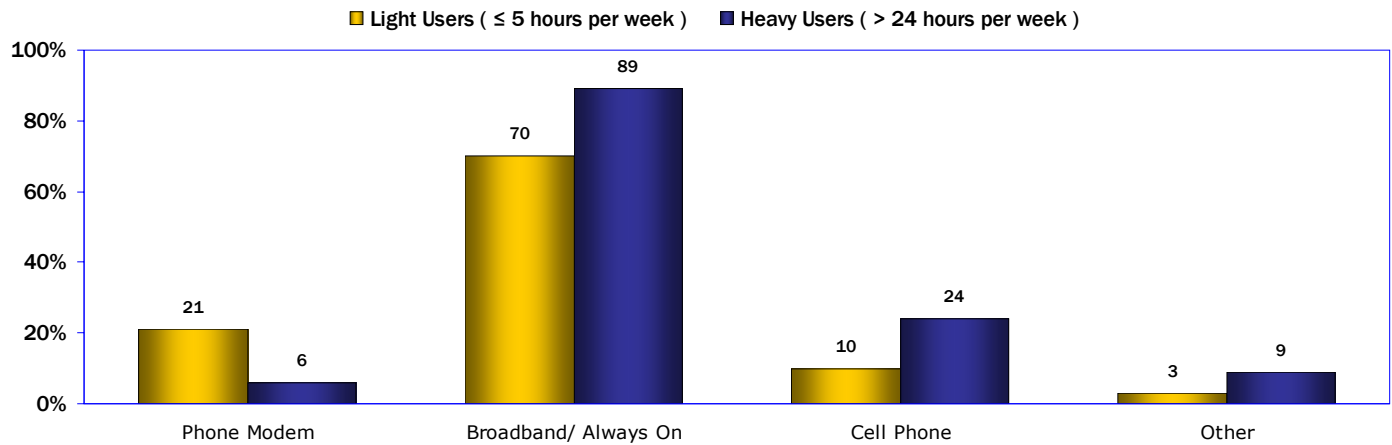
(Q360 M-3 2010) (Multiple responses possible)

23. Internet Connection at Home: Light Users vs. Heavy Users

Very large percentages of both light users and heavy users go online at home through a broadband connection, and broadband use by heavy users is now approaching 90 percent.

Although more than 21 percent of light users still go online through a telephone modem, Internet access through cell phones by light users is now 10 percent. And a large majority of light users (70 percent) go online at home through a broadband connection.

Internet Access by Type of Connection
(Percentage of Home Internet Users: Light Users vs. Heavy Users)



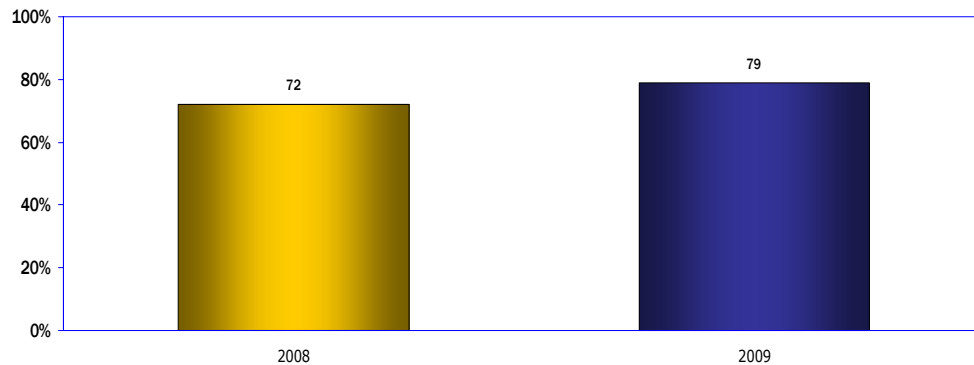
(Q360 M-2 2010) (Multiple responses possible)

Wi-Fi at Home

24. Wireless Internet Access and Laptop Computers

Seventy-nine percent of home users with laptops said they use a wireless connection to that computer -- up modestly over the previous study.

**Wireless Internet Access from Home
(Internet Users with Laptop Computers)**



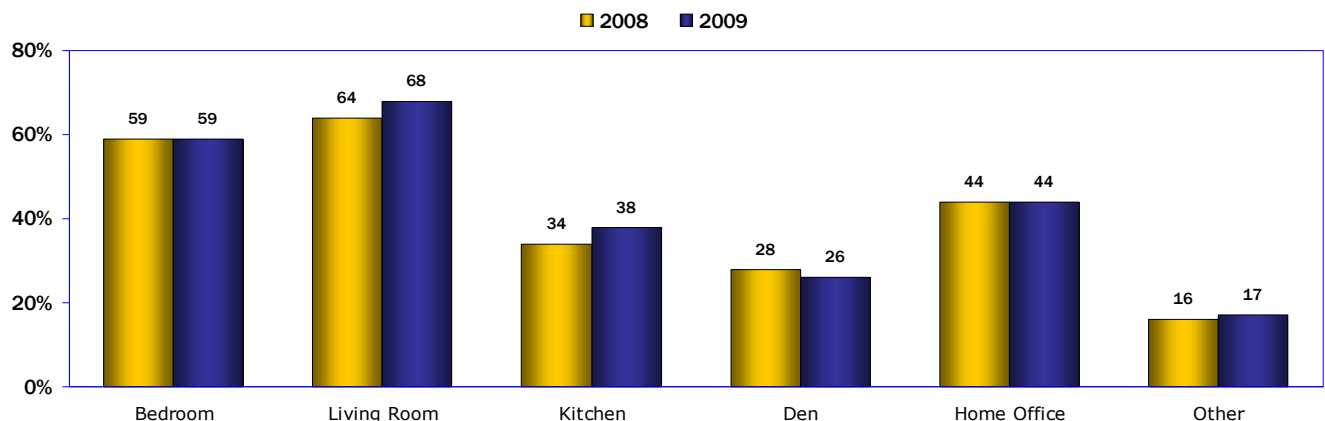
(Q135 M-1 2010)

25. Using Wireless Connections at Home: Where is it Used?

The largest -- and growing -- percentage of users report that they use their wireless connection in the living room. More than two-thirds of respondents in the current study use their wireless connection in the living room -- up marginally from 64 percent in 2008.

With multiple responses possible, the second largest percentage said they used their wireless connection in the bedroom (59 percent), while wireless use in a home office ranked third (44 percent).

**From What Room(s) Do You Generally Use Wi-Fi at Home?
(Respondents Who Use the Internet at Home)**



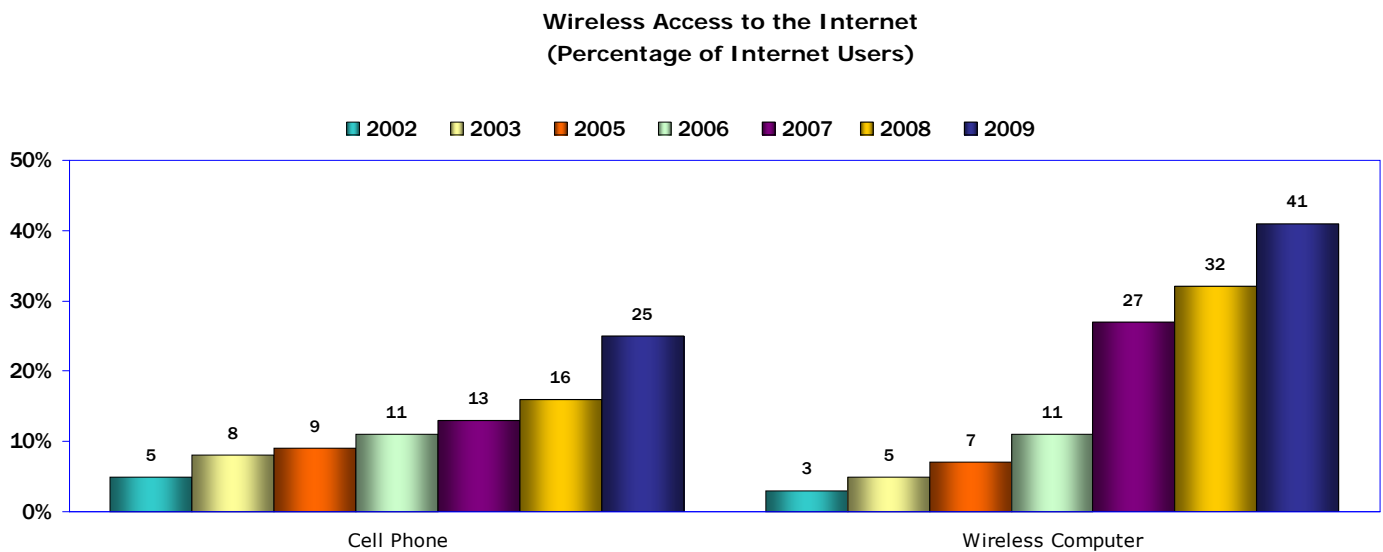
(Q136 M-1 2010) (Multiple responses possible)

26. Internet Access by Cell Phone and Wireless Computer

Internet access through cell phones and wireless computers continues to increase, growing substantially in the current Digital Future Project and reaching a new high level for the study.

In the current study, one-quarter of Internet users go online through their cell phone, up from 16 percent in 2008. Internet access through a wireless computer jumped to 41 percent of users, an increase from 32 percent in 2008 and more than four times the level of only five years ago.

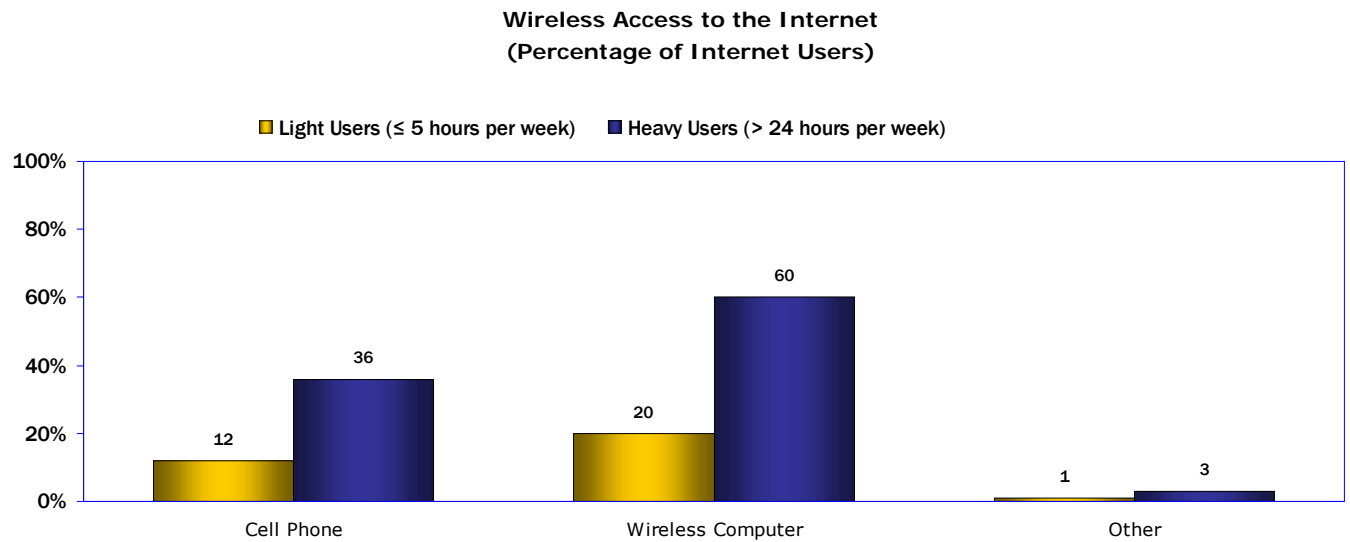
(Note: in the current study 46 percent of users said they use neither a cell phone or a wireless computer to access the Internet.)



(Q440 M-1 2010) (Multiple responses possible)

27. Internet Access by Cell Phone And Wireless Computer: Light Users vs. Heavy Users

Three times as many heavy users as light users said they go online through wireless devices (either a cell phone or wireless computer).



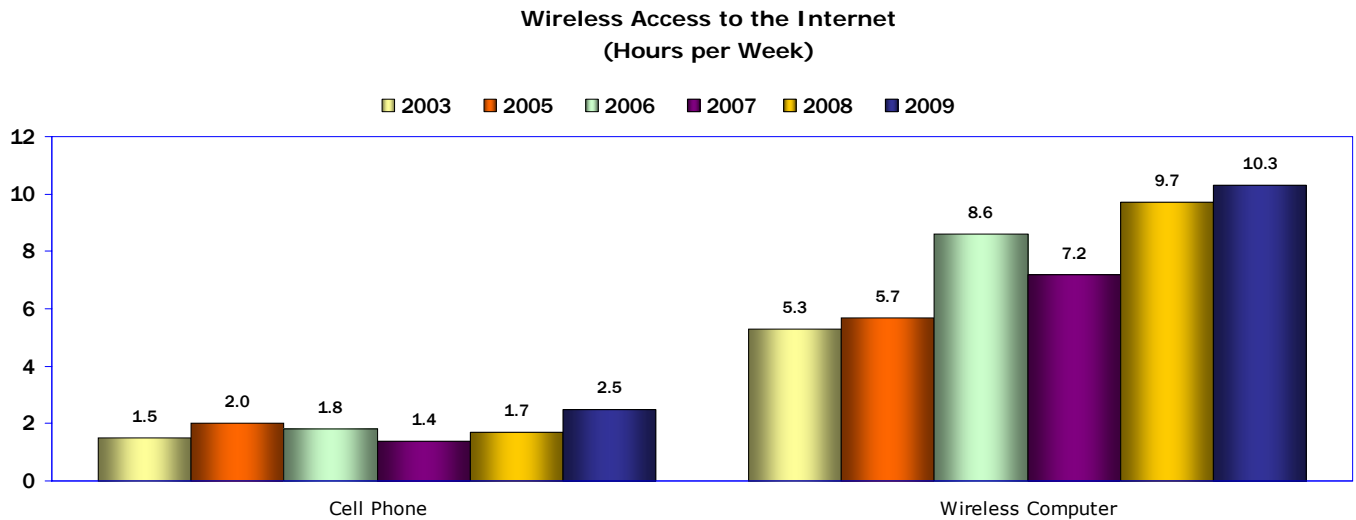
(Q440 M-2 2010)

28. Internet Access by Mobile Devices and Wireless Computer: Hours per Week

While the percentage of users who go online through wireless connections continues to increase (*see page 51*), the number of hours per week that users access the Internet through wireless methods has also grown for the third straight year.

The hours of online access reported by Internet users who go online with their cell phones has increased to 2.5 hours per week in the current study, up from 1.7 hours in 2008 and 1.4 hours in 2007.

For users with wireless computers, the number of hours of online access has passed 10 hours per week in the current study – a new high thus far in the Digital Future Project.

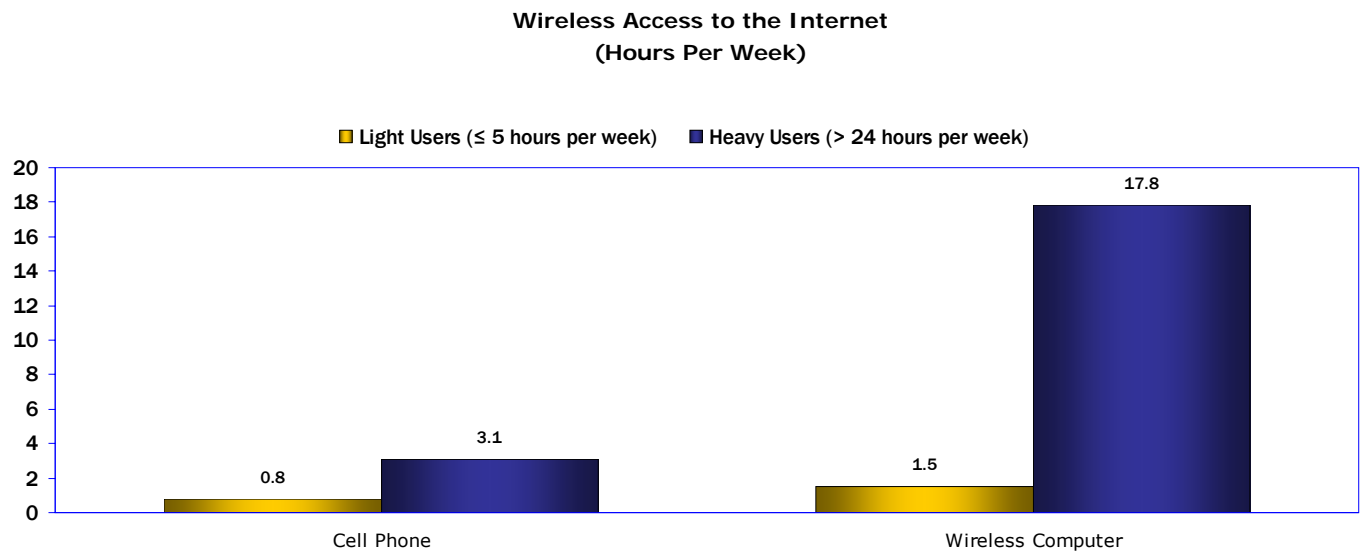


(Q441 M-1 2010)

29. Internet Access by Mobile Devices and Wireless Computer: Hours per Week (Light Users vs. Heavy Users)

Heavy users report much higher levels of online access through a wireless computer than do light users – more than 11 times as much per week.

Heavy users report 3.1 hours of Internet access through their cell phone, compared to less than one hour (.8 hours) by light users.



(Q441 M2 and M3 2010)

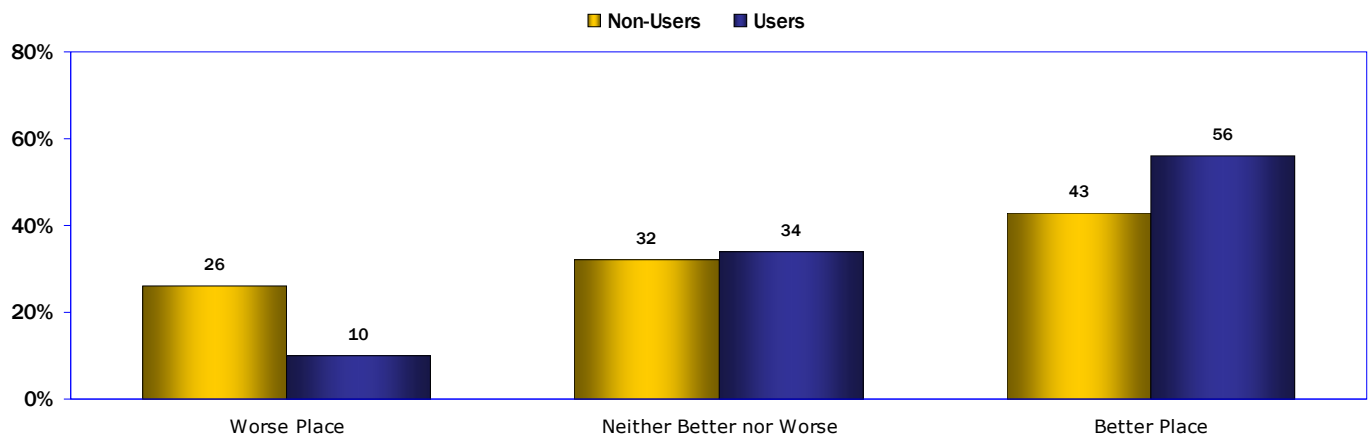
30. Communication Technology: How Does it Affect the World?

Internet users and non-users continue to express divergent views about the impact of new communication technology on the world (including the Internet, cell phones, pagers, and other electronics).

Fifty-six percent of Internet users in the current study said that communication technology makes the world a better place, but only 43 percent of non-users express the same view. And the percentage of users who said communication technology is making the world a better place has generally been declining for five years (see the next page).

More than twice the percentage of non-users (26 percent) as users (10 percent) said communication technology makes the world a worse place.

Has Communication Technology Made the World a Better Place, or a Worse Place?
(Percentage of Respondents Age 16 and Older)



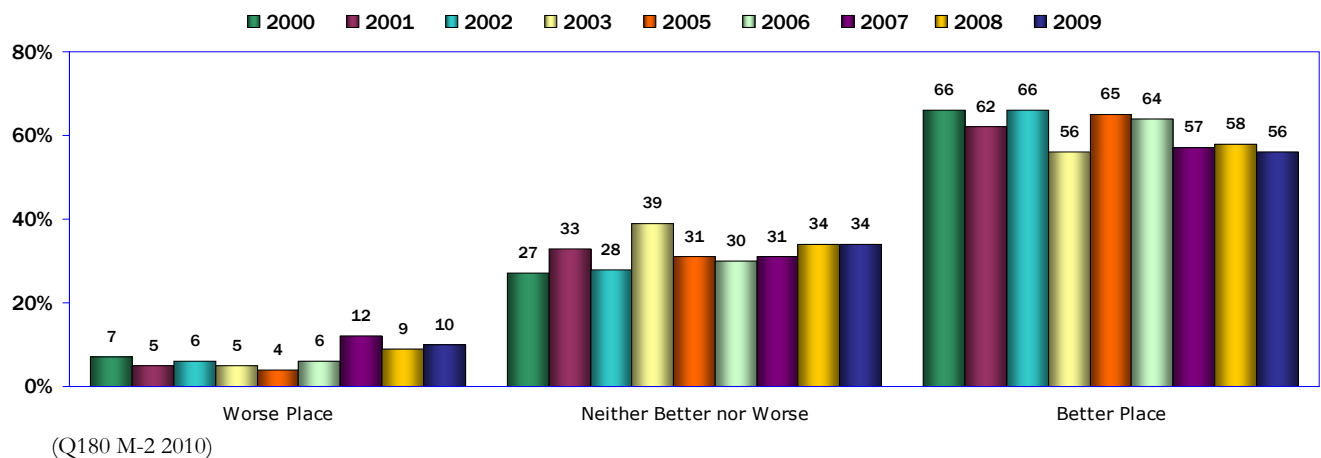
(Q180 M-1 2010)

31. Communication Technology: How Does it Affect the World? (Users)

The percentage of users age 16 and older who said that communication technology makes the world a better place has declined to 56 percent of users from its peak of 66 percent in 2000 and 2002.

The percentage of these users who said that communication technology makes the world a worse place increased marginally in the study, while those who believe that this technology makes the world neither better or worse remained the same.

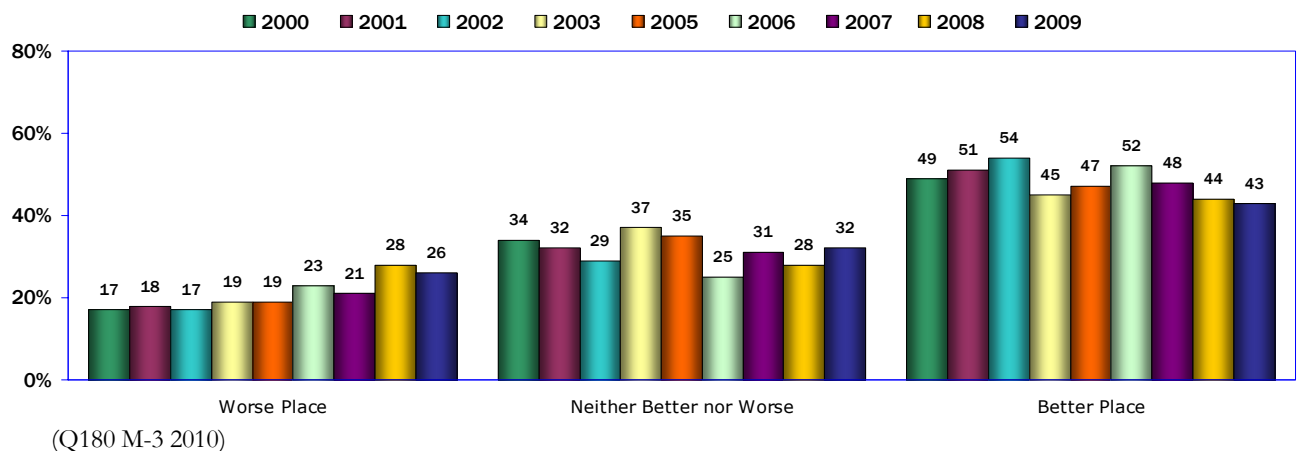
Has Communication Technology Made the World a Better Place, or a Worse Place?
(Percentage of Internet Users Age 16 and Older)



32. Communication Technology: How Does it Affect the World? (Non-Users)

For the fourth straight year, the percentage of non-users age 16 and older who said that communication technology makes the world a better place declined -- now to 43 percent of Internet non-users. However, the percentage of non-users who said that technology makes the world a worse place also decreased, while those who said that communication technology makes the world neither better or worse increased slightly.

Has Communication Technology Made The World A Better Place, Or A Worse Place?
(Percentage of Internet Non-Users Age 16 and Older)



Internet Non-Users

Internet non-users ***18%***

***Internet “dropouts”
(non-users who previously
went online)*** ***39%***

***How many years
on average did dropouts
use the Internet
before they stopped?*** ***3***

***Will non-users go online
in the next year?
(somewhat likely or very likely)*** ***38%***

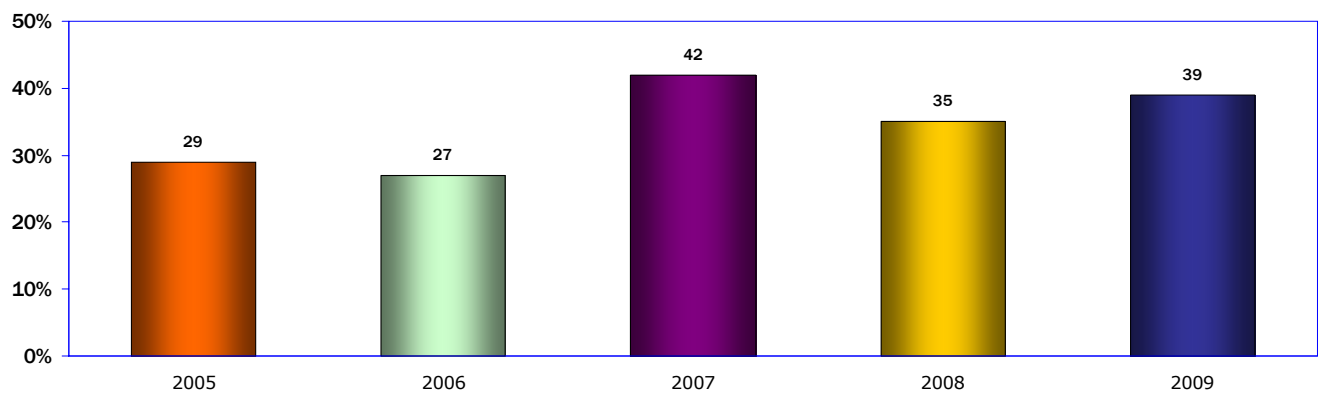
***Will Internet dropouts
go back online?*** ***36%***

Internet Non-Users: Exploring the Views of 18 percent of Americans

33. Internet Non-users: Were They Ever Online?

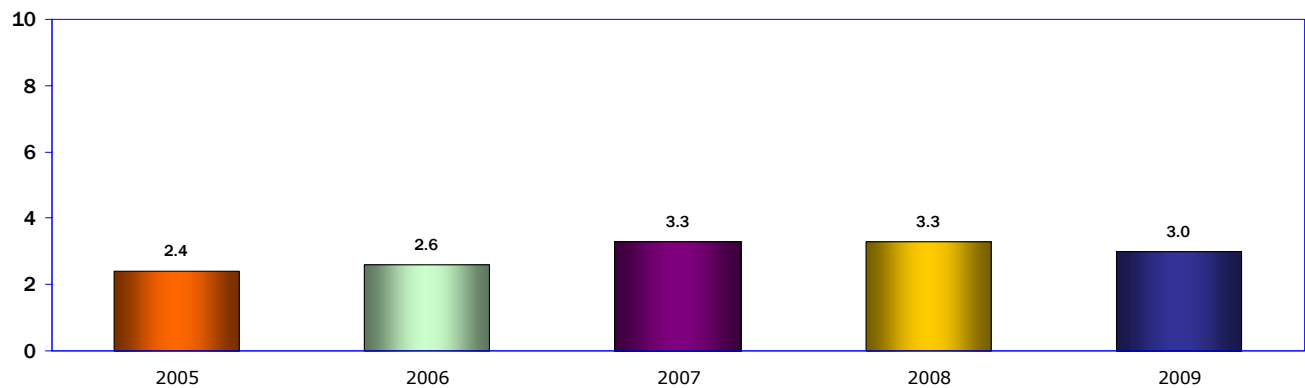
Of the 18 percent of Americans who are not currently using the Internet, 39 percent had previously gone online, and had used the Internet for an average of three years before stopping (see bottom chart).

Did You Ever Use the Internet?
(Percentage of Internet Non-Users)



(Q540 JC-1 2010)

How Long Did You Use the Internet Before Stopping?
(Years of Use by Internet Dropouts)



(Q570 JC-1 2010)

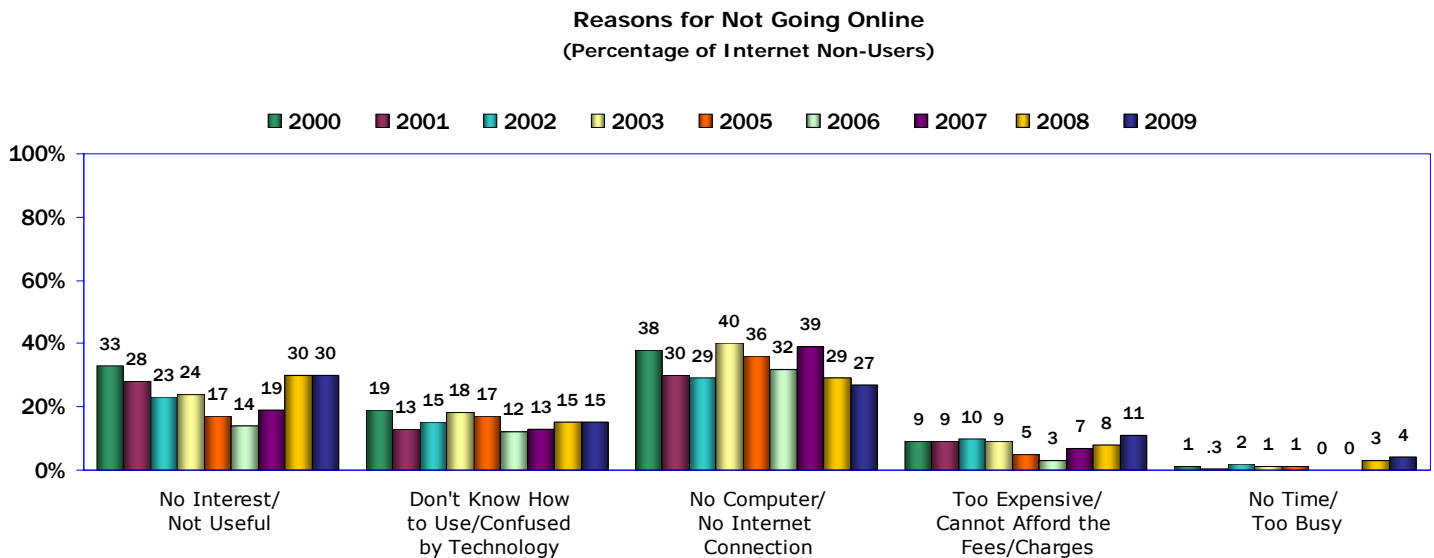
34. Internet Non-Users: Reasons for Not Being Online

A decade of studying the behavior of Internet users and non-users shows that those who do not go online continue to offer four principal reasons for not going online -- but some new trends are developing.

The most common reason for not using the Internet continues to be “no interest” or “not useful,” cited by 30 percent of all non-users in the current study – for the second year in a row, the most-cited reason for not going online. The second-most popular reason continues to be “no computer” or “no Internet connection.”

The third most common reason -- “don’t know how to use the Internet” or “confused by technology” – was reported by 15 percent of non-users, the same percentage as in 2008.

The fourth most common explanation – a combination of responses that focus on the expense of using the Internet – increased slightly for the third year in a row.



(Q591 JC-2 2010) (“No Internet connection” was added to the “no computer” category in 2006)

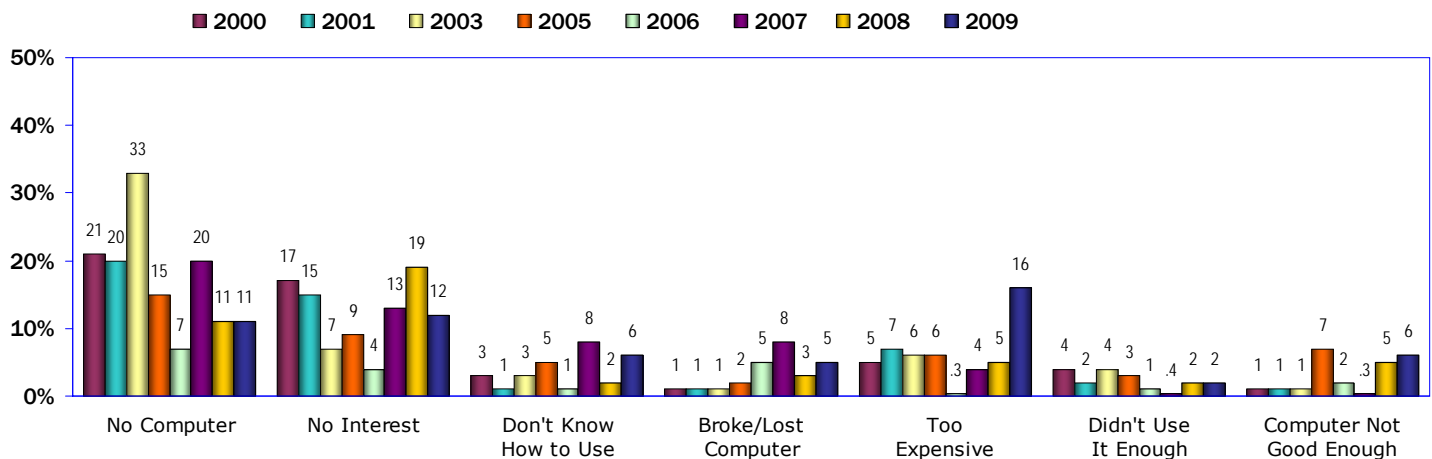
35. “Internet Dropouts”: Why Do Users Stop Going Online?

“Internet dropouts” -- those who previously used the Internet but no longer go online -- continue to report several principal reasons for continuing to be non-users. But as with other non-users, some of the responses by Internet dropouts changed significantly in the current Digital Future study.

Perhaps not surprisingly in an economic downturn, the largest percentage of Internet dropouts report they stopped going online because it was too expensive – a large jump to 16 percent of dropouts compared to five percent in 2007. However, the new second most-cited reason was “no interest” (12 percent). The percentage who cited “no interest” declined considerably in the current study but still surpassed “no computer,” which was mentioned by 11 percent of dropouts.

Having a computer that is “not good enough” for Internet use was stated by six percent in the current study, up from five percent in 2008 and near-zero in 2007. Also mentioned by six percent of dropouts was “don’t know how to use the Internet,” up from two percent in 2008.

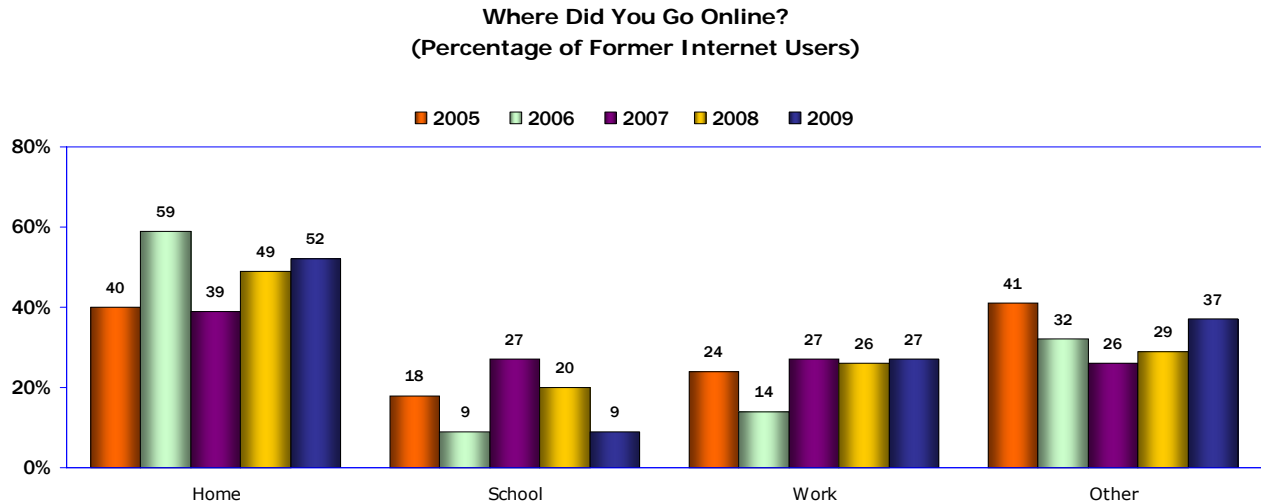
Internet Dropouts: Reasons Why Former Internet Users No Longer Go Online
(Percentage of Former Internet Users)



(Q580 JC-2 2010)

36. Where Did Dropouts Previously Access the Internet?

More than half of Internet dropouts in the current study had been home users (52 percent), while a smaller percentage used the Internet at work (27 percent), or school (9 percent).

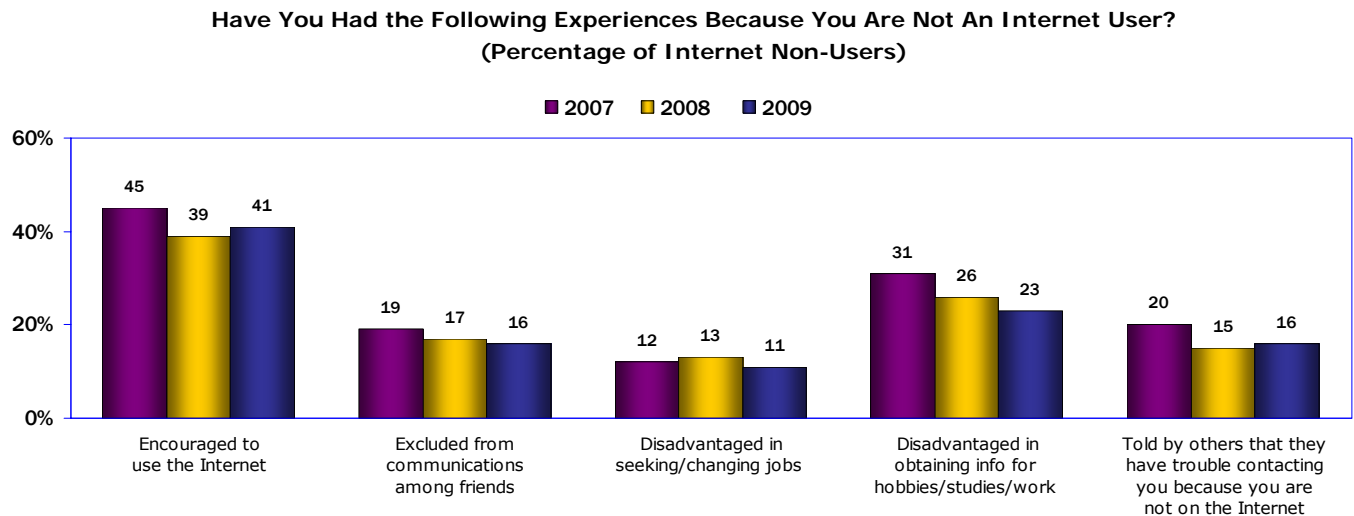


(Q550 M-1 2010)

37. Internet Non-Users: Views About Not Being Online

Forty-one percent of non-users in the current study said that others encourage them to use the Internet – up slightly from 39 percent in 2008. Slightly lower percentages of non-users in the current study said that not being online excluded them from communicating with friends (16 percent), created disadvantages in job-seeking (11 percent), and limited their ability to obtain information for hobbies, studies, or work (23 percent).

Compared to 2008, a marginally higher percentage of non-users in the current study said that others had trouble contacting them because they were not online.



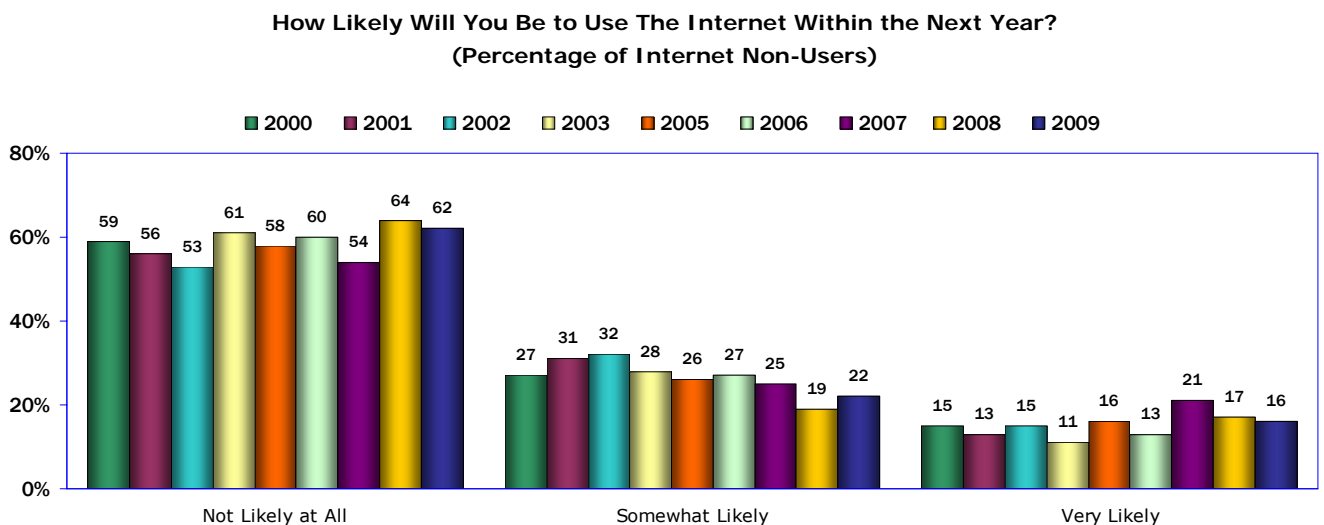
(Q600 JC-1 2010) (Multiple responses possible)

38. Internet Non-Users: Will They Go Online?

Will Internet non-users eventually go online?

Thirty-eight percent of Internet non-users said they are somewhat likely or very likely to go online within the next year – up slightly from 36 percent in 2008 and the second-lowest percentage in the eight years of the Digital Future studies.

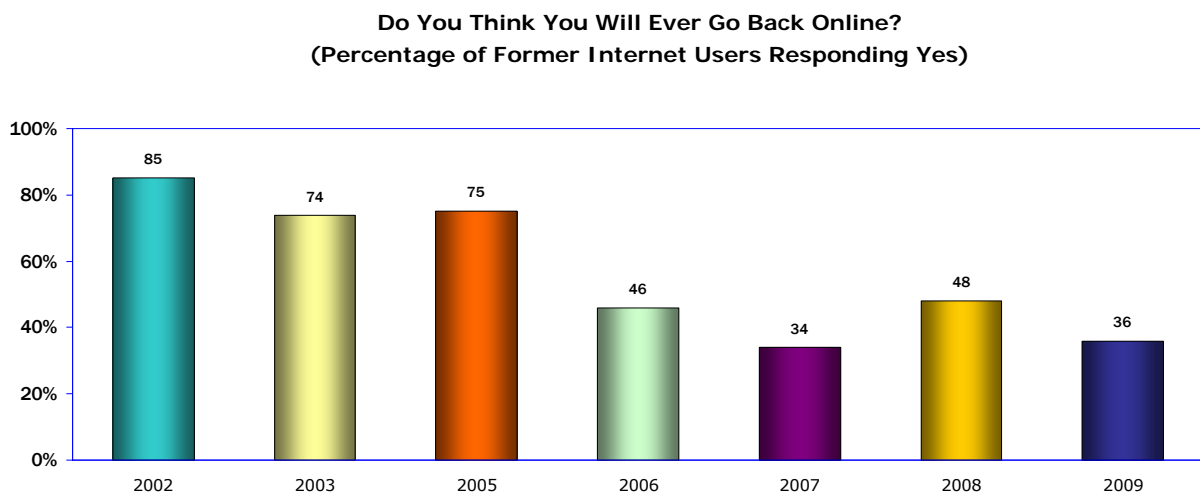
The percentage of non-users who said they are not likely at all to use the Internet in the next year decreased to 62 percent of non-users – down from 64 percent in 2008.



(Q610 JC-2 2010)

39. Internet Dropouts: Will They Go Back Online?

The percentage of Internet dropouts who said they will go back online declined considerably in the current study.



(Q620 JC-2 2010)

Media Use And Trust

Users who said the Internet is an important source of information **78%**

Internet users who said most or all information on these Web sites is reliable and accurate:

Government sites **80%**

Established media sites **73%**

Individuals' sites **15%**

Internet users who would not miss their printed newspaper if the offline version was no longer available **22%**

Internet users who stopped a subscription to a newspaper or magazine because they get the same information online **18%**

Internet users who read print newspapers who would read the online edition of their paper if the print edition ceased publication **59%**

40. Views about Sources of Information and Entertainment

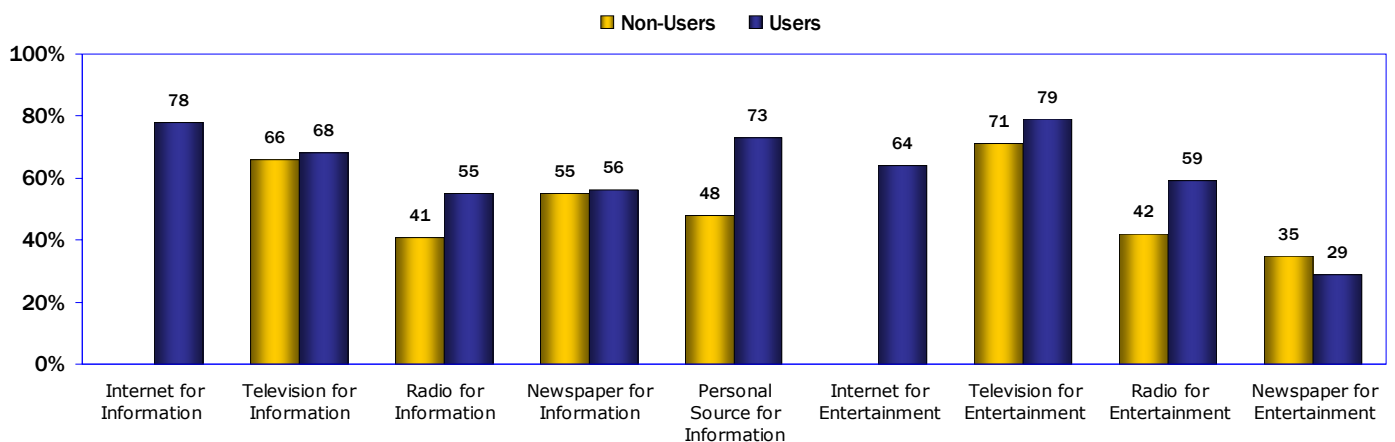
In the current Digital Future Project, a large majority of respondents age 17 and older said that the Internet was an important or very important source of information for them (78 percent) -- higher than the figure reported for television (68 percent), newspapers (56 percent), or radio (55 percent).

Among non-users age 17 and older, the largest percentage of respondents said that television is an important or very important source of information for them (66 percent), compared to newspapers (55 percent), and radio (41 percent).

Comparing the views of users about the importance of entertainment sources, television ranks highest, with 79 percent of users saying it is an important or very important entertainment source for them, compared to the Internet (64 percent), radio (59 percent), and newspapers (29 percent).

Among non-users, television also ranks highest by importance as an entertainment source (71 percent), followed by radio (42 percent) and newspapers (35 percent).

Views about Media as Sources of Information and Entertainment
(Percentage of Respondents Age 17 and Older Answering "Important" or "Very Important" for Them)



(Q530 JC-1 2010)

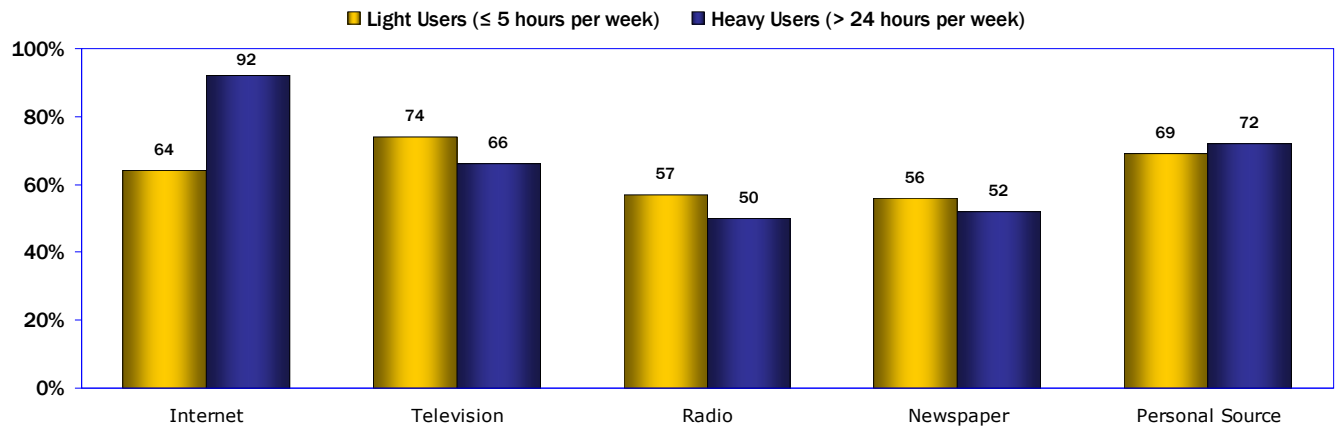
Of particular note is the continuing decline of the importance of print newspapers as information sources for both Internet users and non-users: in 2008, 60 percent of users (56 percent in the current study) and 60 percent of non-users (55 percent in the current study) said that newspapers were important or very important for them.

4I. Views about Sources of Information: Light Users vs. Heavy Users

Almost all heavy users age 16 and older (92 percent) consider the Internet to be an important or very important source of information for them -- much higher than the percentage for television (66 percent), radio (50 percent), or newspapers (52 percent).

A much lower percentage of light users age 16 and older (64 percent) consider the Internet to be an important or very important source of information for them. Almost three-quarters of light users (74 percent) said television was an important or very important source of information for them.

Views about Media as Sources of Information
(Percentage of Light Users vs. Heavy Users Age 16 or Older Answering "Important" or "Very Important" for them)



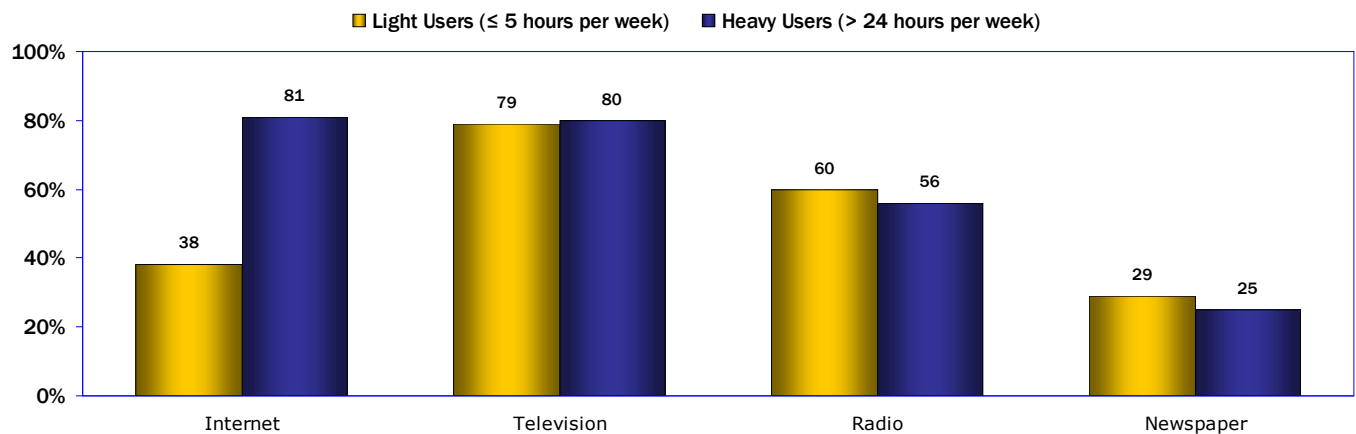
(Q530 JC-2 2010)

42. Views about Sources of Entertainment: Light Users vs. Heavy Users

Heavy users and light users age 16 and older had widely divergent views about the importance of the Internet for entertainment.

A larger percentage of heavy users age 16 and older (81 percent) ranked the Internet as an important or very important entertainment source for them compared to other media. Only 38 percent of light users consider the Internet to be an important or very important source of entertainment.

Views about Media as Sources of Entertainment
(Percentage of Light Users vs. Heavy Users Age 16 or Older Answering “Important” or “Very Important” for them)



(Q530 JC-3 2010)

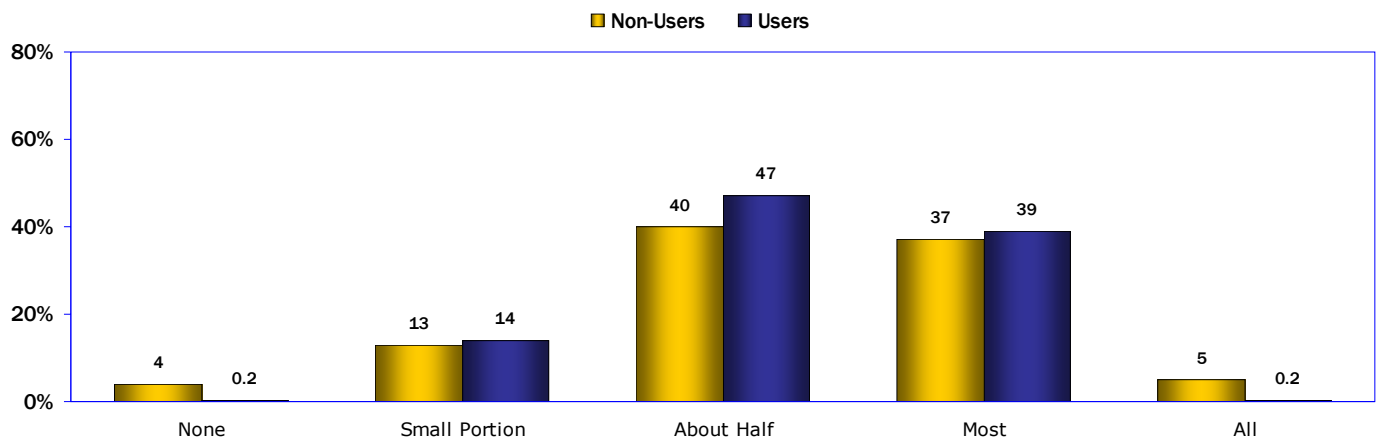
43. Information Online: Is it Reliable?

A slightly higher percentage of non-users compared to users in the current Digital Future study said that most or all of the information on the Internet is reliable.

Forty-two percent of Internet non-users and 39 percent of users said that most or all of the information online is generally reliable.

However, comparing several years of findings, the percentage of users who think that most or all of the information online is reliable continues to decline (*see the next page*).

**How Much of the Information on the World Wide Web Overall
Do You Think Is Reliable?
(Percentage of Internet Non-Users vs. Users)**



(Q160 M-1 2010)

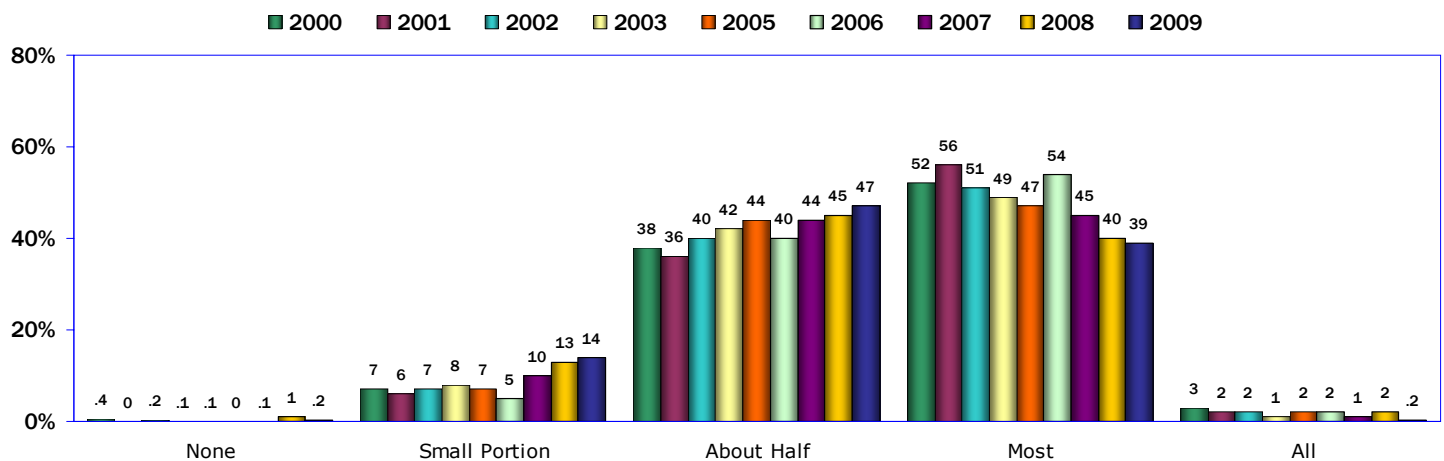
44. Reliability of Information Online: Views of Internet Users

For the third year in a row, a declining percentage of Internet users said that most or all of the information online is reliable.

The 39 percent of Internet users who said that most or all of the information online is reliable represents a new low level thus far in the Digital Future Project.

The percentage of users who said that only a small portion or none of the information online is reliable has grown for the past three years, and has now reached 14 percent of users.

**How Much of the Information on the World Wide Web Overall
Do You Think is Reliable?**
(Percentage of Internet Users)



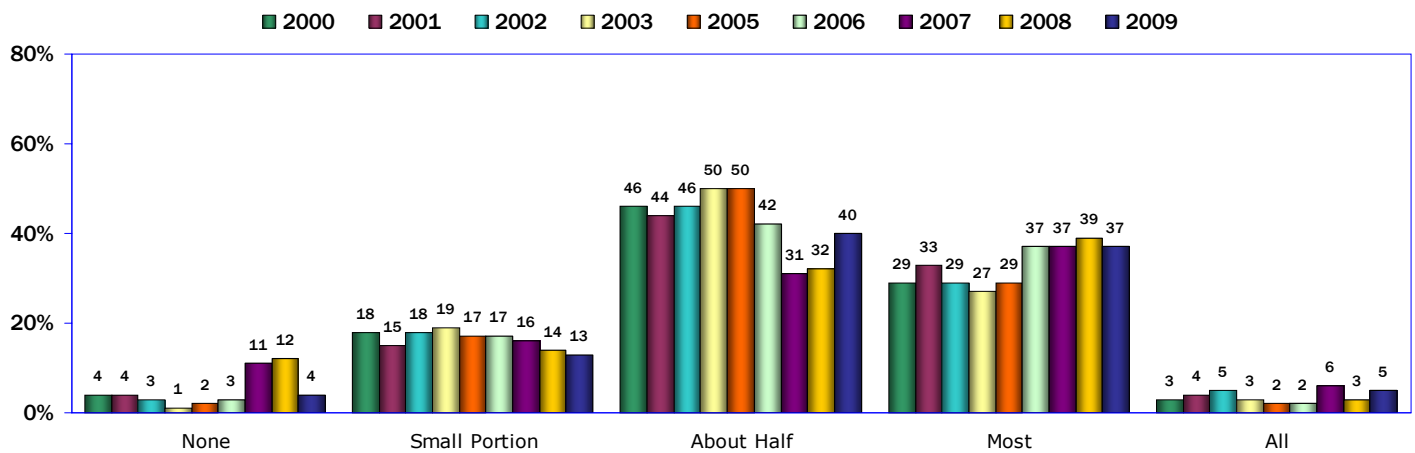
(Q160 M-3 2010)

45. Reliability of Information Online: Views of Non-Users

While the percentage of Internet users who said that most or all of the information online is reliable continues to decline (see the previous page), the percentage of non-users who report the same responses has remained generally stable for three years, and in the current study was 42 percent -- the same as in 2008.

The percentage of Internet non-users who said that a small portion or none of the information online is reliable declined to 17 percent in the current study, down from 26 percent in 2008.

**How Much of the Information on the World Wide Web Overall
Do You Think is Reliable?**
(Percentage of Internet Non-Users)



(Q160 M-2 2010)

46. Online Information: Reliability and Accuracy of Frequently-Visited Web Sites

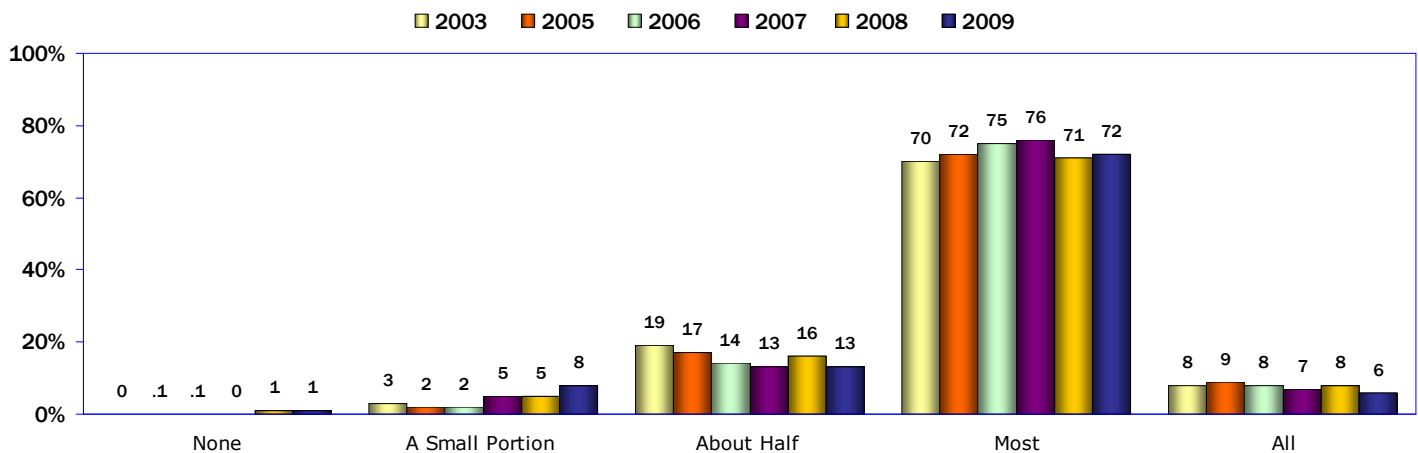
Internet users have much more faith in the Web sites they visit regularly than they do in information online overall, but that faith continues to decline.

In the current study, 78 percent said that most or all of the information on the Web sites they visit regularly is reliable and accurate, compared to 79 percent in 2008 and 83 percent in both 2007 and 2006.

The percentage of users who said that about half of the information on the sites they visit regularly is reliable and accurate declined slightly over 2008, while the percentage of users who said only a small portion of that information is reliable and accurate increased slightly, to eight percent.

Of particular note is that in spite of the high percentages of users with positive views about online information, a significant percentage (22 percent) of users say that only about half or less of information on the sites they visit regularly is reliable and accurate.

**How Much of the Information on the World Wide Web Sites
that You Visit Regularly Do You Think is Reliable and Accurate?
(Percentage of Internet Users)**



(Q170 M-3 2010) (Excludes Internet users who do not visit Web sites regularly.)

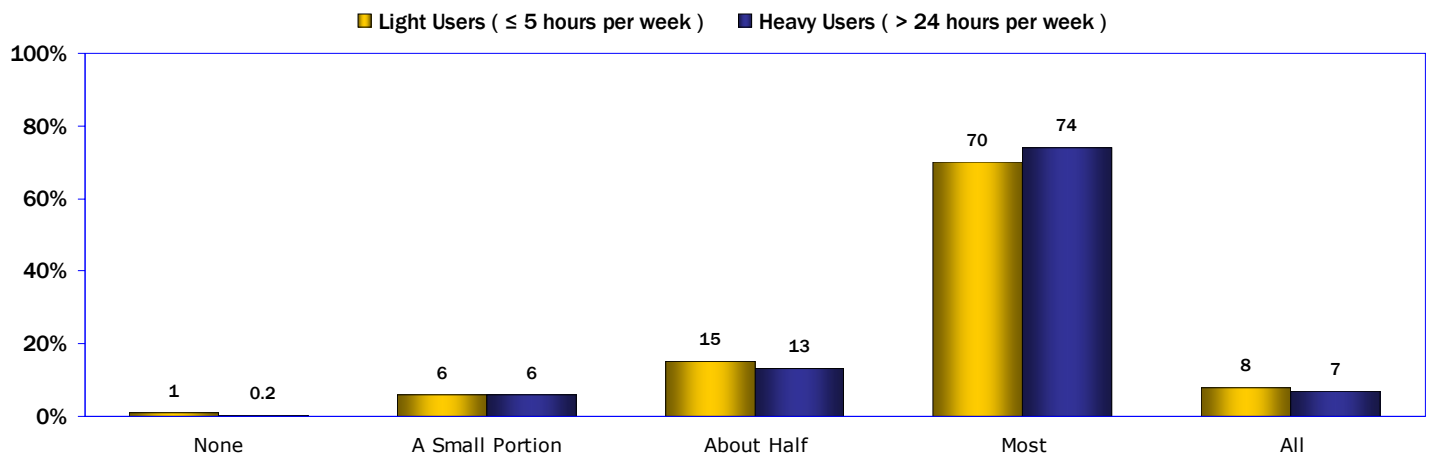
47. Views about the Reliability and Accuracy of Online Information: Light Users vs. Heavy Users

A slightly larger percentage of heavy Internet users compared to light users have positive views about the Web sites they visit regularly.

Of heavy users, 81 percent said that most or all of the information on the Web sites they visit regularly is reliable and accurate, compared to 78 percent of light users with the same view.

Statistically identical percentages of heavy users and light users (six percent) said that only a small portion or none of the information on Web sites they visit regularly is reliable and accurate.

**How Much of the Information on the World Wide Web Sites
that You Visit Regularly Do You Think is Reliable and Accurate?
(Percentage of Light Users vs. Heavy Users)**



(Q170 M-2 2010) (Excludes Internet users who do not visit Web sites regularly.)

48. Web Sites: Which Are Reliable and Accurate, and Which Are Not?

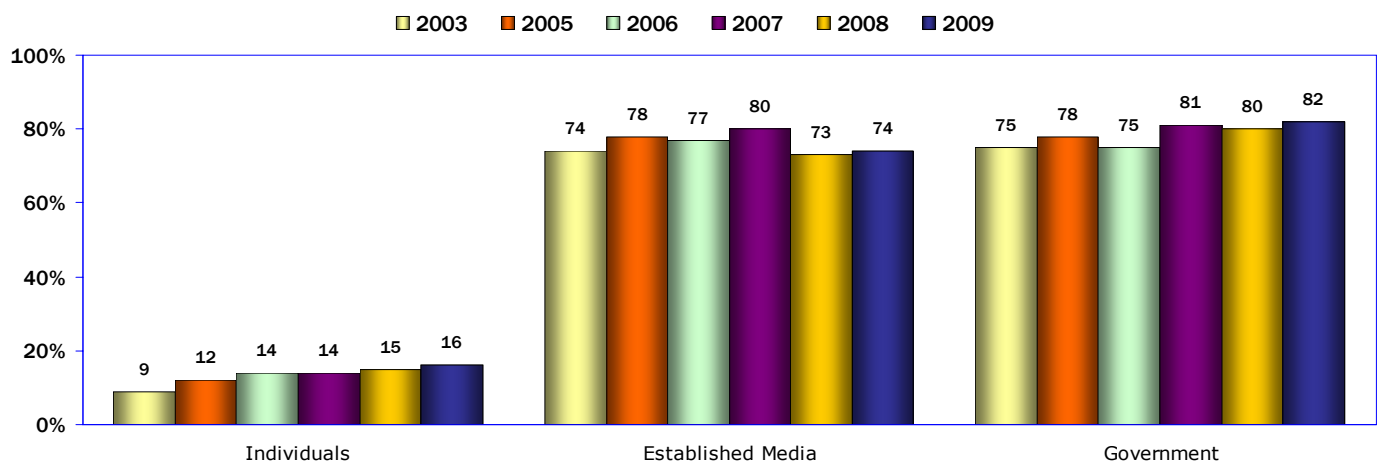
The percentage of Internet users who said that most or all of the information posted by individuals, governments, and established media is reliable and accurate rose slightly in the current Digital Future Study.

In the current Digital Future Project, 82 percent said that government Web sites were generally reliable and accurate – up from 80 percent in 2008.

Faith in most or all of the information posted by established media (such as nytimes.com and cnn.com) increased to 74 percent of users, up marginally from 73 percent in 2008.

Compared to information posted by governments or media, information posted by individuals continues to have a much lower level of credibility. Only 16 percent of users said that most or all of the information posted by individuals is reliable and accurate, but the percentage who expressed this view represents the highest level thus far in the Digital Future Studies – almost double the number reported in 2003, the first year this question was asked.

**How Much of the Information on Specific Types of Internet Sites
Do You Think are Generally Reliable and Accurate?
(Percentage of Internet Users Reporting “Most” or “All”)**



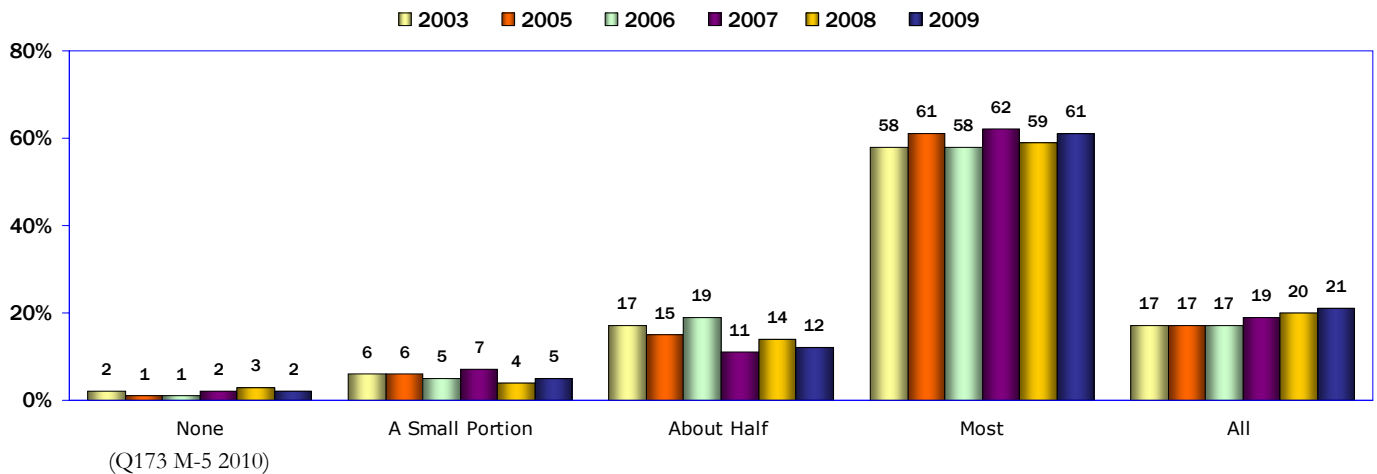
(Q173 M-3-6-9 combined)

49. Government Web Sites: Internet Users

The percentage of Internet users who said that most or all of the information on government Web sites is reliable and accurate increased slightly in the current study -- up to 82 percent compared to 79 percent in 2008.

The percentage of users who say that only a small portion or none of the information on government Web sites is reliable and accurate remained unchanged in the current study (seven percent).

**Reliability and Accuracy of Government Web Sites
(Percentage of Internet Users)**

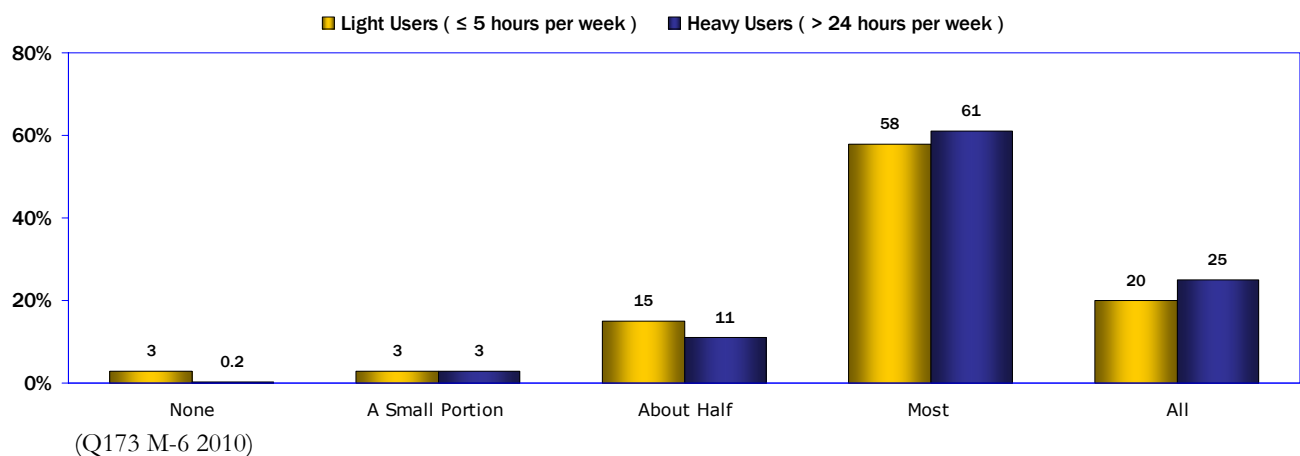


50. Government Web Sites: Light Users vs. Heavy Users

Seventy-eight percent of light Internet users and 86 percent of heavy users said that most or all of the information posted on government Web sites is reliable and accurate.

One-quarter of heavy users compared to one-fifth of light users said that all of the information on government Web sites is reliable and accurate.

**Reliability and Accuracy of Government Web Sites
(Percentage of Light Users vs. Heavy Users)**



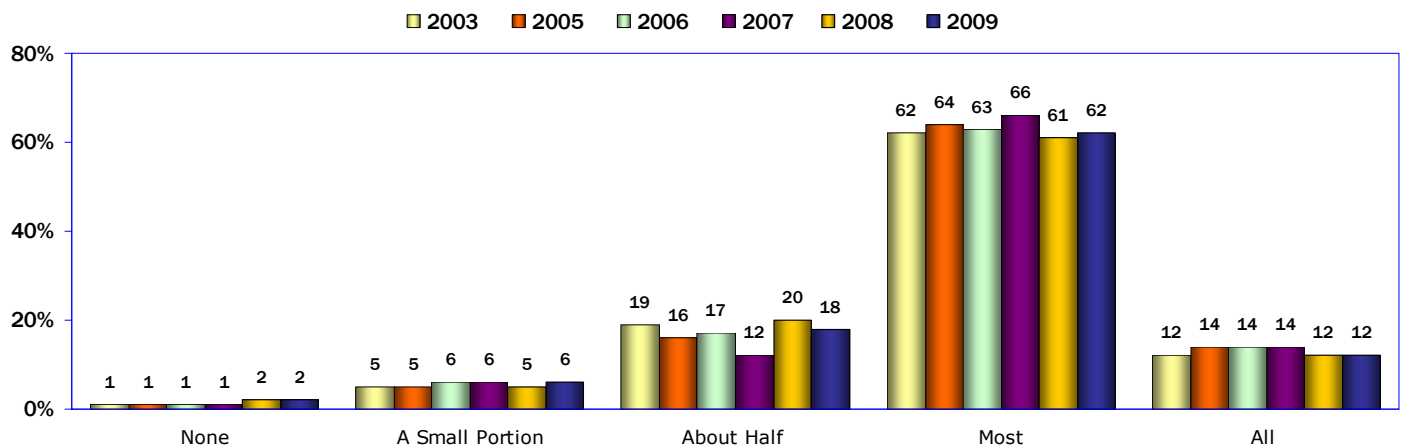
5I. Media Web Pages: Reliability And Accuracy

The percentage of Internet users who report high levels of reliability and accuracy for established media Web pages increased slightly in the current study, after declining in 2008.

Seventy-four percent of Internet users said that most or all of the information posted on media Web sites such as nytimes.com and cnn.com is generally reliable and accurate – up marginally from 73 percent in 2008.

The percentage of users who said that only a small portion or none of the information on established media Web pages is reliable and accurate also increased marginally in the current study, to eight percent, up from seven percent in 2008.

**Reliability and Accuracy of News Pages Posted by Established Media
(Percentage of Internet Users)**



(Q173 M-1 2010)

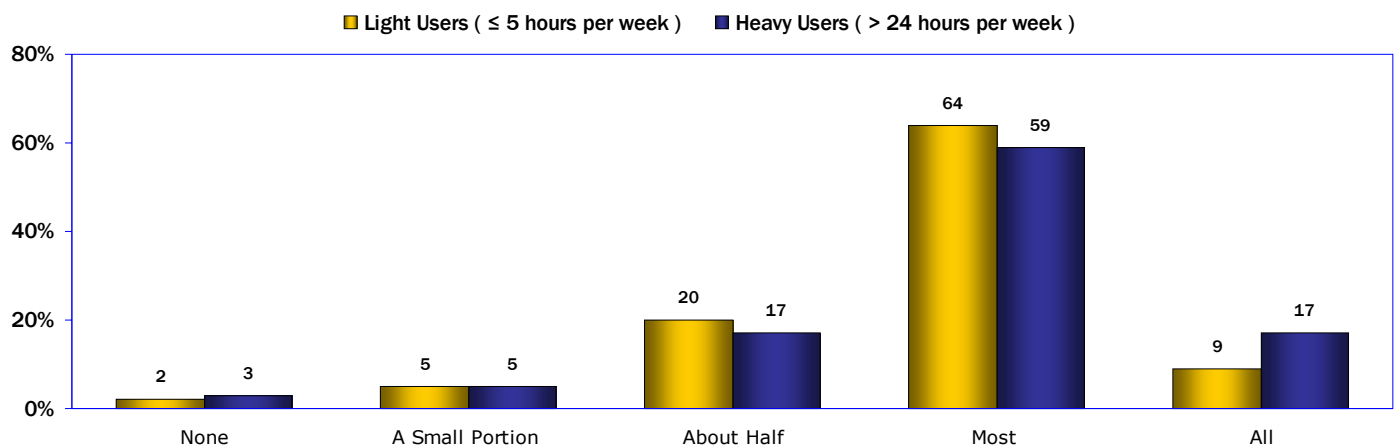
52. Reliability and Accuracy of Media Web Pages: Light Users vs. Heavy Users

Light users and heavy users report similar levels of positive views about the reliability and accuracy of news pages posted by established media.

Seventy-six percent of heavy users and 73 percent of light users said that most or all of the information of information on Web pages posted by established media is reliable and accurate.

The largest difference between light users and heavy users was that 17 percent of heavy users said that all of the information on established media sites is reliable and accurate, compared to nine percent of light users who expressed the same view.

**Reliability and Accuracy of Established Media Web Sites
(Percentage of Light Users Vs. Heavy Users)**



(Q173 M-2 2010)

53. Web Pages Posted by Individuals: Reliability and Accuracy

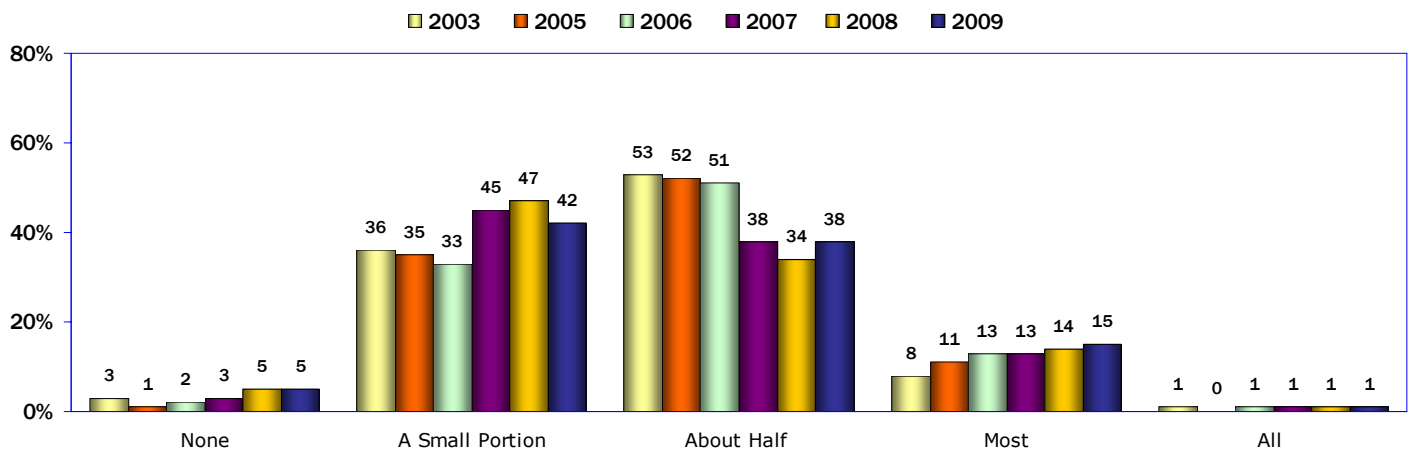
Internet users report extremely negative views about the reliability of Web pages posted by individuals compared to sites posted by established media or government (see previous four pages).

Only 16 percent of users in the current Digital Future Project said that most or all of the information on Web pages posted by individuals is reliable and accurate – up marginally from 15 percent in 2008.

At the other extreme, 47 percent of users said that only a small portion or none of the information on Web pages posted by individuals is reliable and accurate.

Thirty-eight percent of users said that about half of the information on Web sites posted by individuals is reliable and accurate, up from 34 percent in 2008.

**Reliability and Accuracy of Information Web Pages Posted by Individuals
(Percentage of Internet Users)**



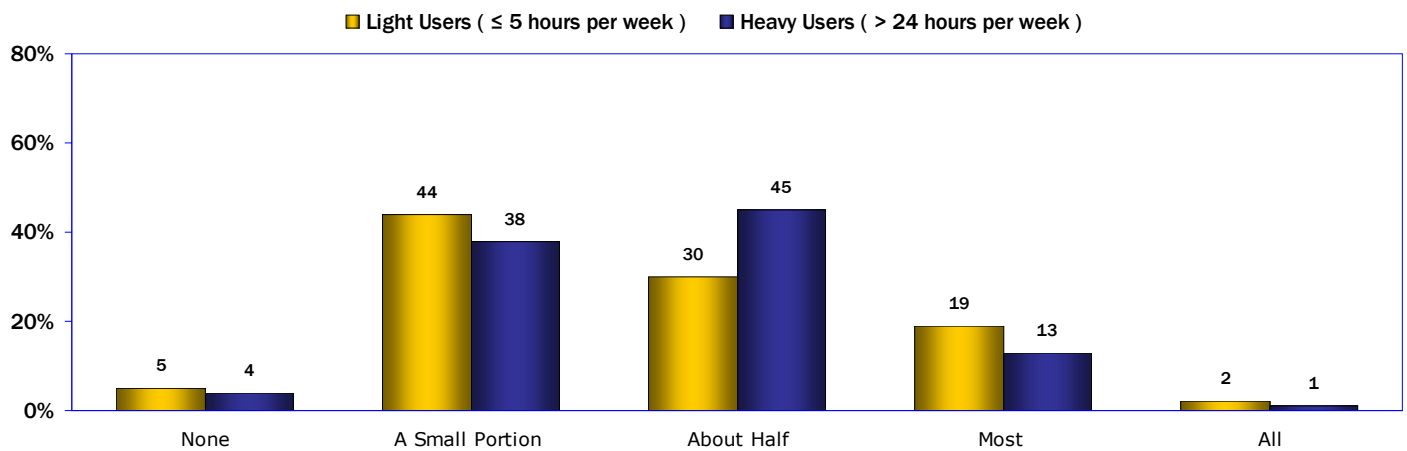
(Q173 M-3 2010)

54. Web Pages Posted by Individuals: Reliability And Accuracy (Light Users vs. Heavy Users)

Twenty-one percent of light users said that most or all of the information posted by individuals is reliable and accurate, compared to 14 percent of heavy users.

Yet almost half of light users (49 percent) said that only a small portion or none of the information posted by individuals is reliable and accurate, compared to 42 percent of heavy users.

**Reliability and Accuracy of Information Web Pages Posted by Individuals
(Percentage of Light Users Vs. Heavy Users)**



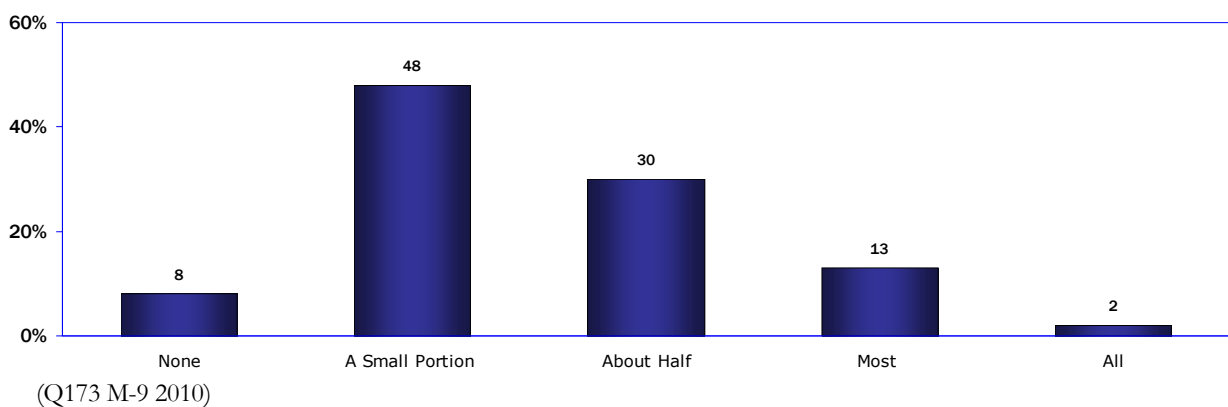
(Q173 M-4 2010)

55. Social Networking Sites: Reliability and Accuracy

Internet users believe that social networking sites such as Facebook or MySpace are even less reliable and accurate than Web sites posted by individuals (*see page 79*).

A new question for the Digital Future Project found that only 15 percent of users said that most or all of the information on social networking sites is reliable and accurate. Fifty-six percent of users said that only a small portion or none of the information on social networking sites is reliable and accurate.

**Reliability And Accuracy Of Information on Social Networking Sites
Such as Facebook and MySpace
(Percentage of Internet Users)**

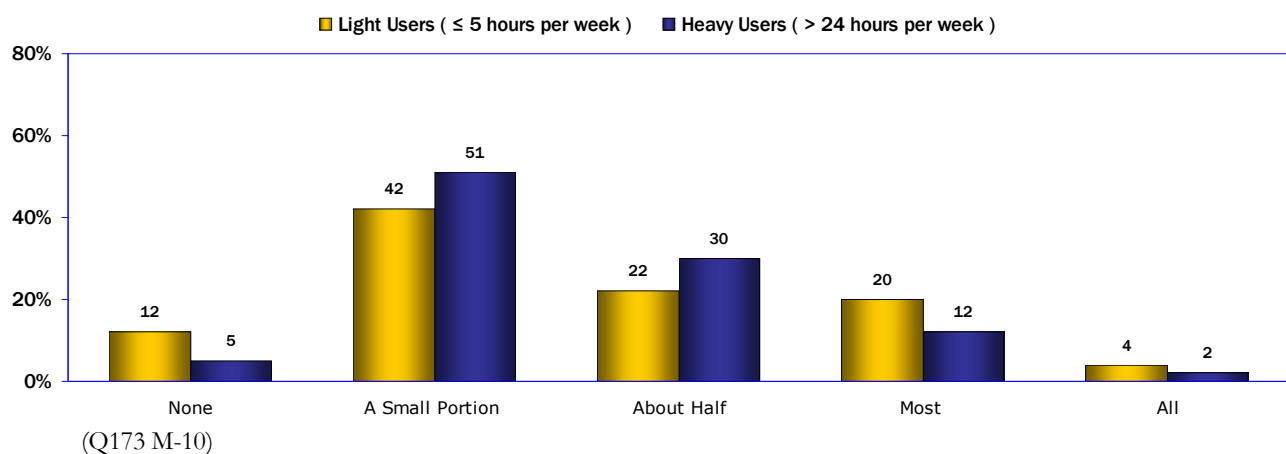


56. Social Networking Sites: Reliability and Accuracy (Light Users Vs. Heavy Users)

Lower percentages of heavy Internet users (14 percent) compared to light users (24 percent) said that most or all of the information on social networking sites is reliable and accurate.

On the other hand, 56 percent of heavy users and 54 percent of light users said that only a small portion or none of the information on social networking sites is reliable and accurate.

**Reliability And Accuracy Of Information on Social Networking Sites
Such as Facebook and MySpace
(Percentage of Internet Users)**



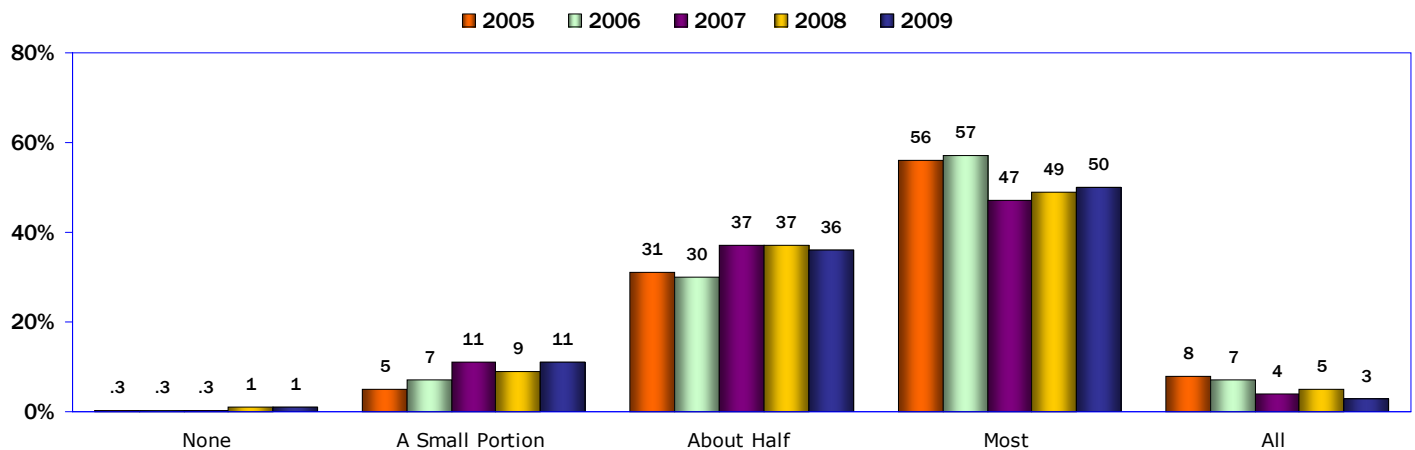
57. Search Engines: Reliability and Accuracy

A majority of Internet users said that most or all of the information provided by search engines such as Google is reliable and accurate.

Fifty-three percent of users said that most or all of the information provided by search engines is reliable and accurate, down from 54 percent in 2008 and well below the peak of 64 percent reported in 2005 and 2006.

Twelve percent of users said that only a small portion or none of the information provided by search engines is reliable and accurate, up slightly from 10 percent in 2008.

**Reliability and Accuracy of Information Provided by Search Engines
(Percentage of Internet Users)**



(Q173 M-7 2010)

58. Search Engines: Views among Light Users vs. Heavy Users about Reliability and Accuracy

Does faith in the reliability and accuracy of search engines decline as Internet use increases?

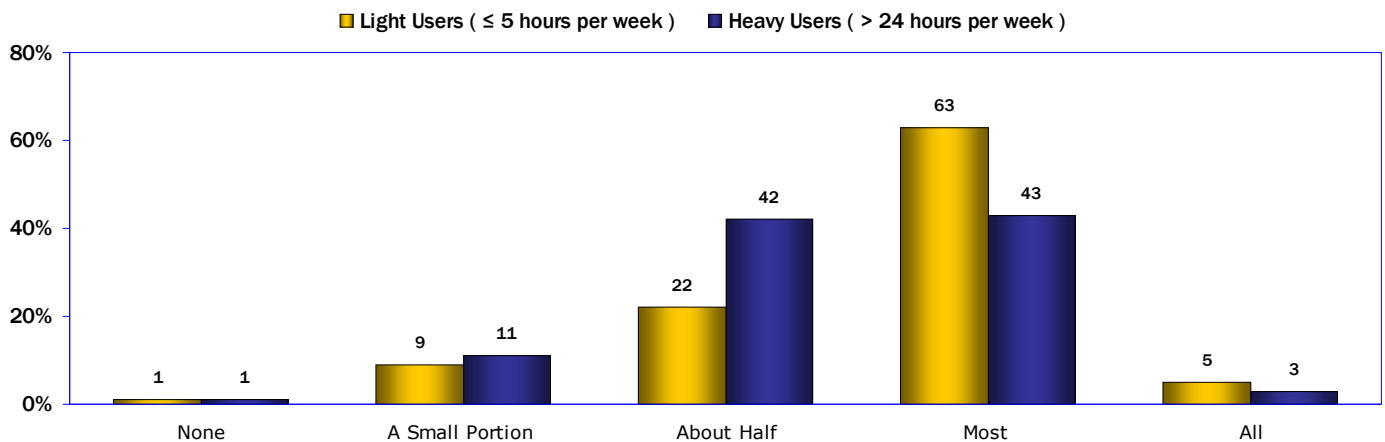
In the current Digital Future Study, heavy Internet users have much less faith than light users in the reliability and accuracy of information provided by search engines.

Forty-six percent of heavy users said that most or all of the information provided by search engines is generally reliable and accurate, compared to 68 percent of light users.

A much larger percentage of heavy users compared to light users said that about half of the information provided by search engines is reliable and accurate (42 percent vs. 22 percent).

A slightly larger percentage of heavy users (12 percent) compared to light users (10 percent) said that only a small portion or none of the information provided by search engines is generally reliable and accurate.

**How Much of the Information Provided by Search Engines is Generally Reliable and Accurate?
(Percentage of Light Users Vs. Heavy Users)**



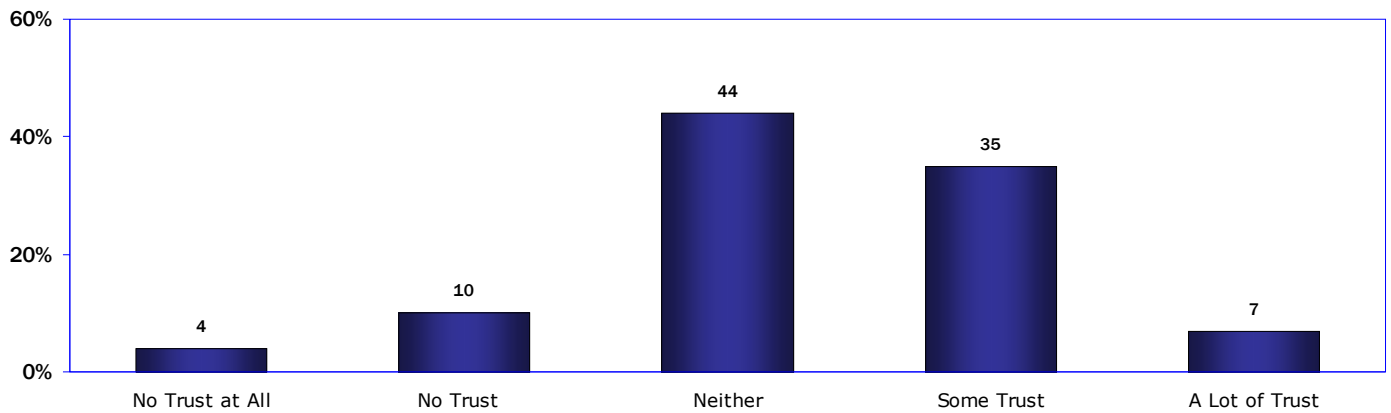
(Q173 M-8 2010)

59. Trust in the Internet

In a new question for the Digital Future Project, respondents were asked about their overall level of trust in the Internet. Forty-two percent of respondents said they have some trust or a lot of trust in the Internet.

Fourteen percent of respondents said they have no trust in the Internet.

**Overall, How Much Trust Do You Have in the Internet?
(All Respondents)**



(Q175 M-1 2010)

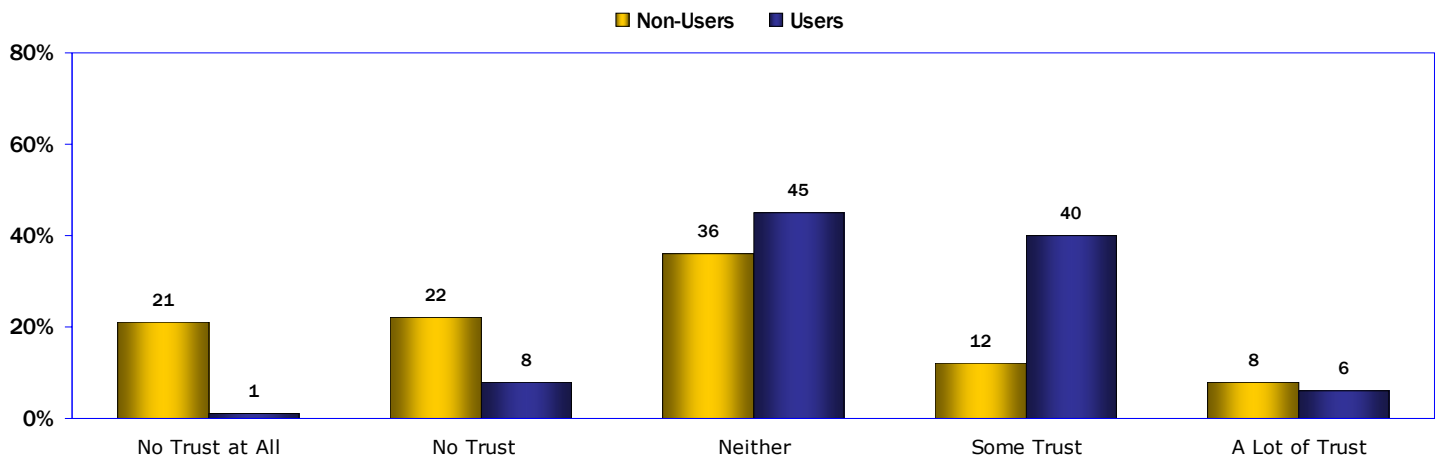
60. Trust in the Internet: Internet Users and Non-Users

Internet users and non-users report widely different views about their trust in the Internet overall.

Forty-six percent of users said they have some or a lot of trust in the Internet – this compared to only 20 percent of non-users. Conversely, 43 percent of non-users have little or no trust in the Internet, compared to nine percent of users.

Of particular note is the extremely low percentage of “a lot of trust” reported by both non-users (eight percent) and users (six percent).

Overall, How Much Trust Do You Have in the Internet?
(Percentage of Internet Non-Users Vs. Users)

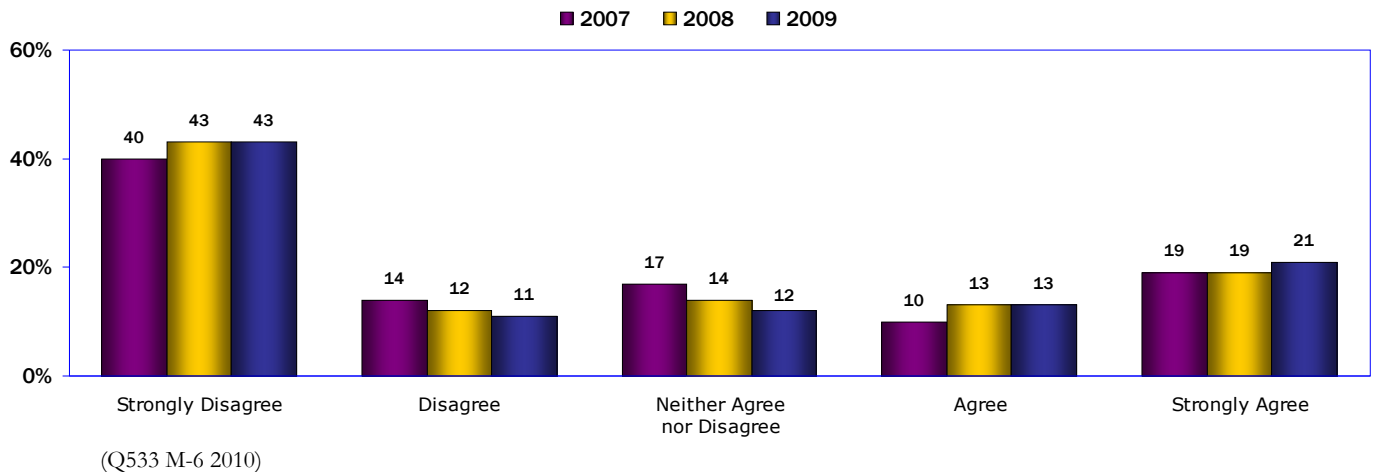


(Q175 M-2 2010)

61. TV Viewing and Time-Shifting

Time-shifting of video viewing is increasing, but only marginally. Thirty-four percent of respondents said they record television shows with a VCR or digital video recorder such as Tivo or those offered by cable or satellite TV providers -- compared to 32 percent in 2008.

**I Often Watch Television Shows
that Have Been Recorded with a VCR Or A Digital Video Recorder
(Percentage of All Respondents)**

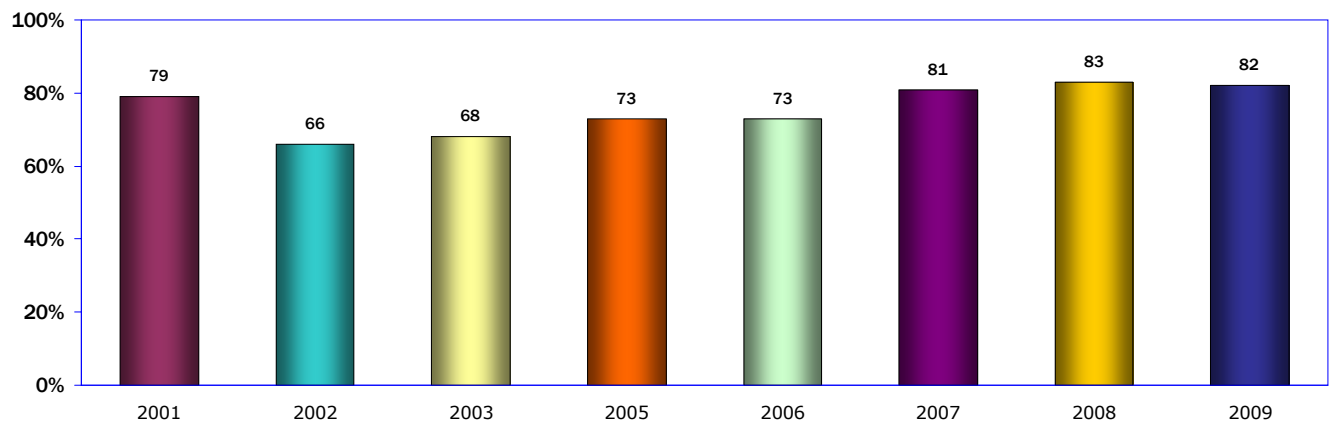


62. Multitasking While Online

For the third year in a row, more than 80 percent of users said they participate in a variety of offline activities while online, such as listening to music, watching TV, or talking on an offline telephone.

The percentage who are multitaskers while online has remained generally stable for three years.

**Do You Do More than One Activity While You are Online,
Such as Listening to Music, Watching TV or Using the Telephone?
(Percentage of Internet Users)**

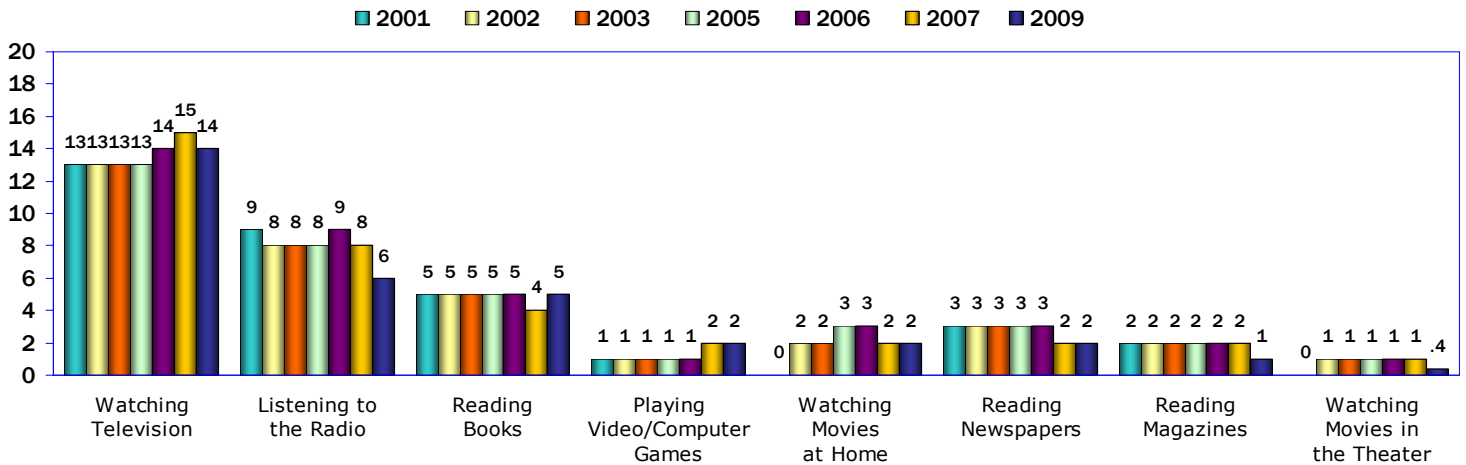


(Q720 M-2 2010)

63. Using Offline Media: Activities

Internet users continue to report that they spend considerable amounts of time using other media while not online. Users report that they spend more time watching television (14 hours) than the next three largest categories combined (listening to the radio, reading books, and playing video games).

**Leisure Time Spent Weekly on Media Activities While Not Online
(Internet Users, Number of Hours)**

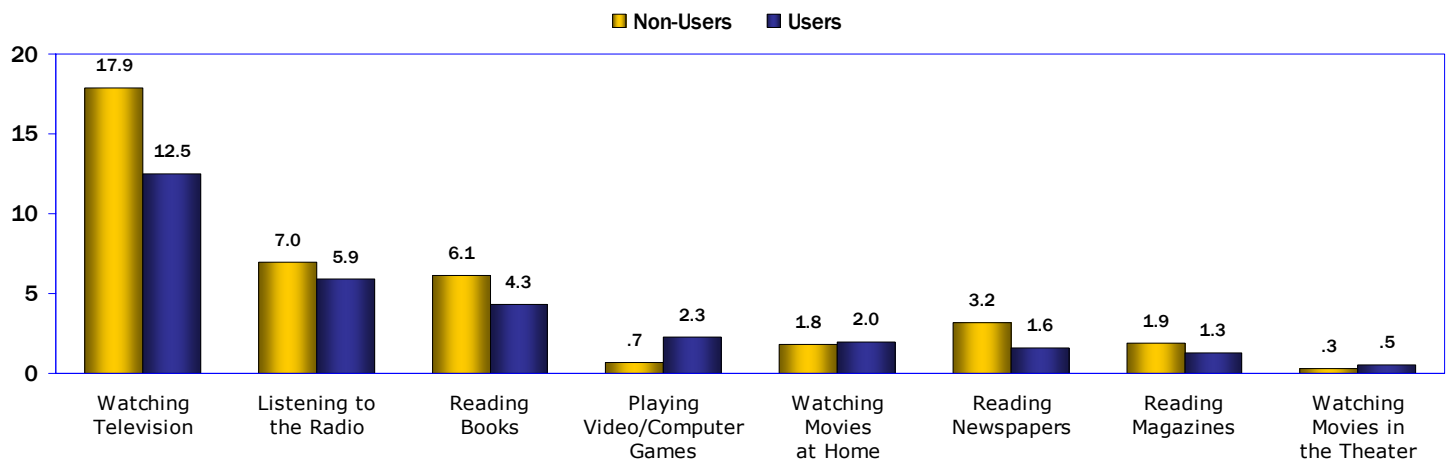


(Q690 M-3 2010) (Numbers rounded)

64. Offline Media: Non-Users vs. Users

Non-users report much larger amounts of time watching television than users, and slightly more time listening to the radio, reading books, reading newspapers, and reading magazines. Users report much more time than non-users playing video games, and slightly more time watching movies at home.

**Leisure Time Spent Weekly on Media Activities While Not Online?
(Non-Users vs. Users)**



(Q690 M-2 2010)

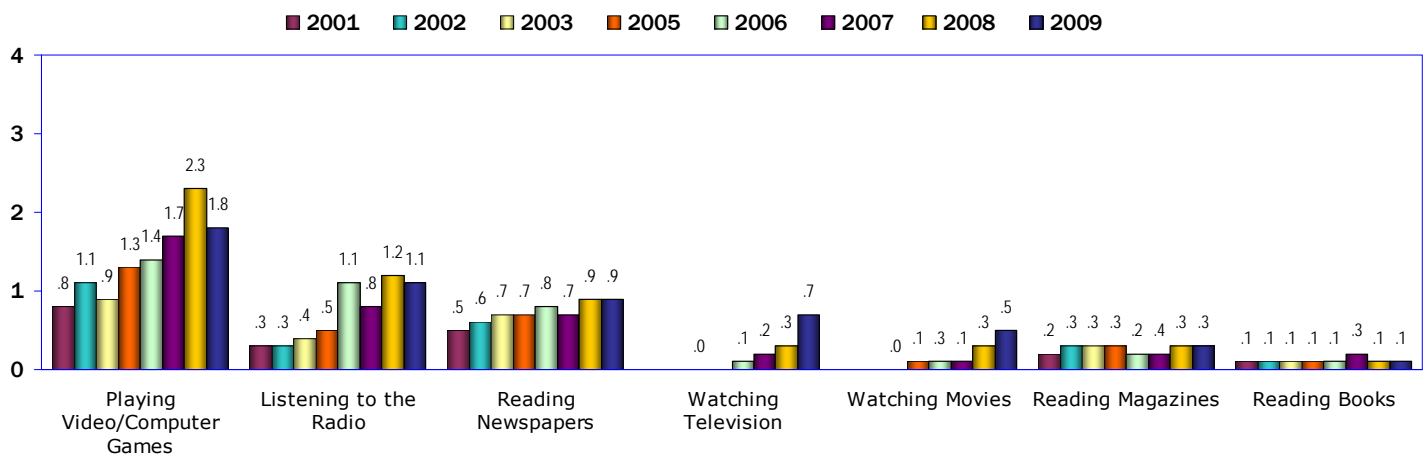
65. Trends in Online Media Use

Internet users continue to report considerable time each week using a variety of online media, but in the current study, use of the two most popular online media declined.

Users report spending the largest amount of time playing online video games: 1.8 hours a week – down from 2.3 hours in 2008. Users report 1.1 hours of listening to online radio, down slightly from 1.2 hours in 2008.

Evidence continues to mount that traditional print media is receiving competition from their online counterparts. Users continue to spend almost an hour per week reading online newspapers (.9 hours), the same as in 2008. And, users also report .7 hours watching online television – more than double the time reported in 2008.

**Weekly Use of Online Media, Hours
(Internet Users)**



(Q700 M-3 2010)

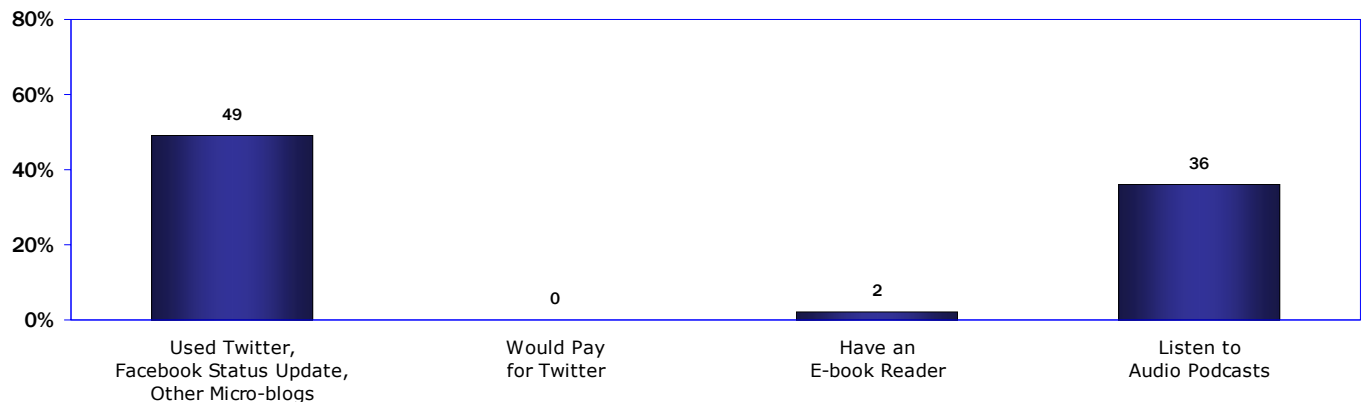
66. Twitter, E-books, Internet Video, and Audio Podcasts

In several new questions for this year's Digital Future Study, Internet users were asked about their use of media that have been growing in popularity, including Twitter, e-books, and audio podcasts.

Among other responses, only two percent of users have an e-book reader (such as a Kindle or Sony Reader), and 36 percent listen to audio podcasts.

The study also found that nearly half of those who go online have used free micro-blogs such as Twitter or Facebook. However, zero percent of users said they would be willing to pay for Twitter, if the free social networking service required a fee.

**Opinions about Select Online Media
(Internet Users)**



(Q534 Combined M-5, 7, 8, 10 2010)

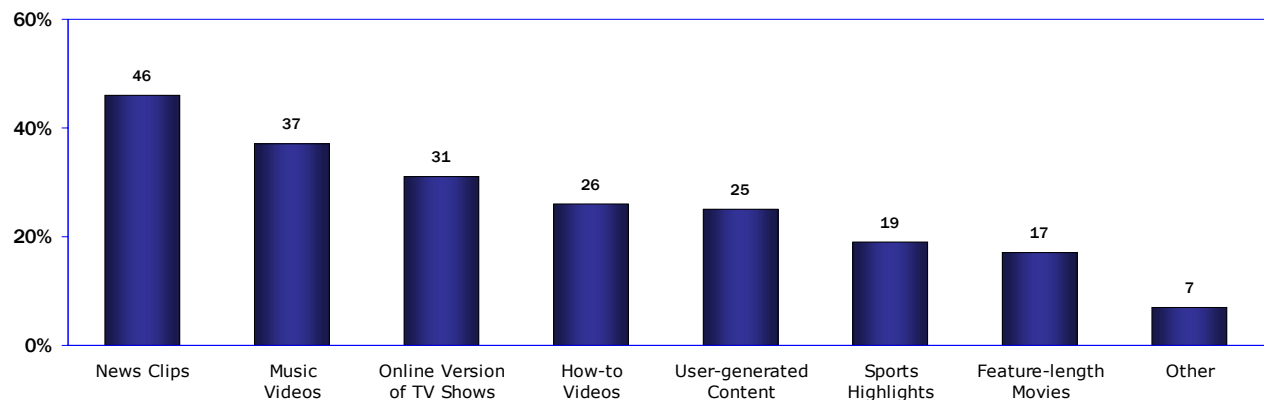
67. Watching Video Content on PCs and Mobile Devices

In another new question for the Digital Future Project, Internet users report widely diverging views about the type of video content they watched, depending on whether the user was accessing the video on an Internet-connected PC or on a mobile device.

In general, much larger percentages of users report watching video content of various types on their Internet-connected PC, compared to those who watch on a mobile device. Of users who watch video content on an Internet-connected PC, 46 percent said they watch news clips; among those who watch video content on mobile devices, only 20 percent watch news clips.

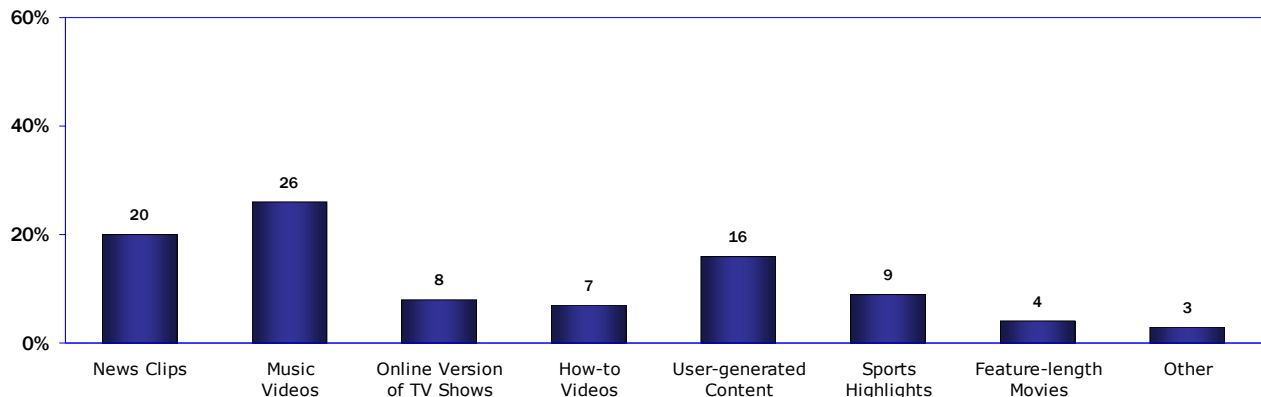
Among the other responses reported by a large percentage of users: 37 percent of users who watch video content on their PC said they watch music videos, compared to 26 percent who watch music videos on mobile devices; 31 percent of those on Internet-connected PCs watch online versions of TV shows, compared to eight percent of those who watch video on a mobile device; and 26 percent of users on PCs watch how-to videos, compared to only seven percent who watch on mobile devices.

**Video Content Watched on Internet-Connected PC
(Internet Users)**



(Q1215 A 2010) (Multiple responses possible)

**Video Content Watched on Mobile Devices
(Internet Users Through Wireless Devices)**



(Q1215 B 2010) (Multiple responses possible)

("Mobile Devices" includes cell phones, MP3 players, portable video game players, etc.)

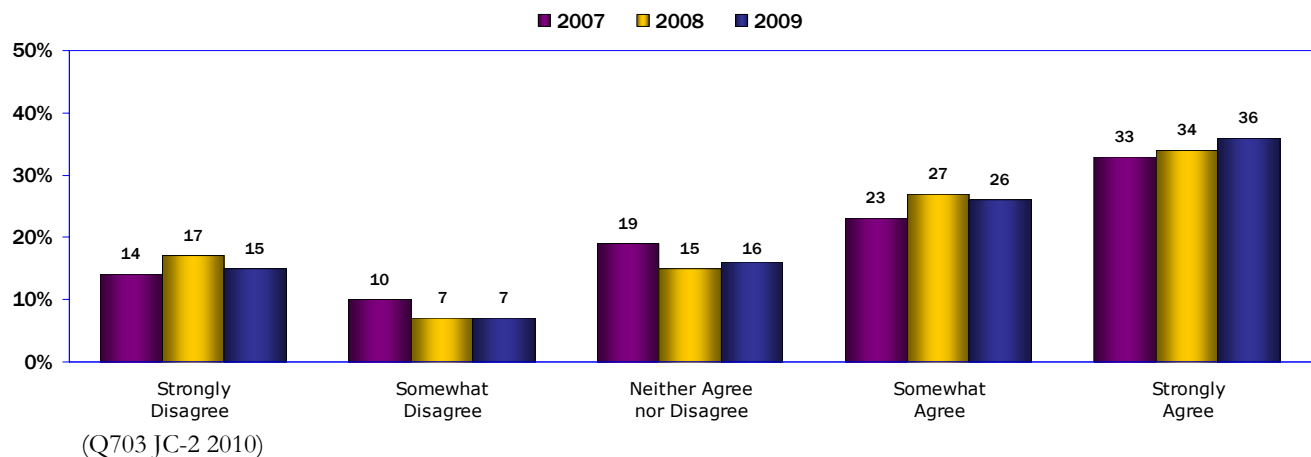
68. Would You Miss the Print Edition of Your Newspaper?

Although Internet users report that they devote significant amounts of time to reading online newspapers (*see page 88*), large percentages of those who read newspapers offline would still miss the print edition of their newspaper if it ceased to exist.

Sixty-two percent of users who read newspapers offline said they would miss the print edition of their newspaper, an increase for the second year in a row.

Twenty-two percent of users who read newspapers said they would not miss the print edition of their newspaper, down from 24 percent in 2008.

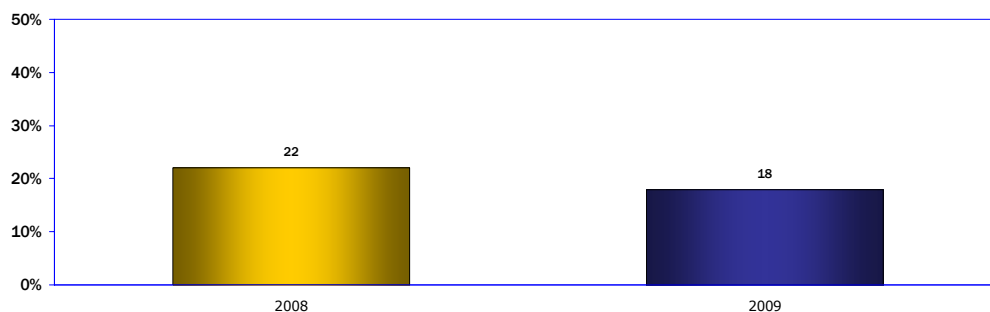
**I Would Miss the Print Edition of My Newspaper if it was No Longer Available
(Internet Users Who Read Newspapers Offline)**



69. Does Online Content Lead to Cancelled Print Subscriptions?

Even though large percentages of users who read newspapers would miss the print edition of the publication if it was no longer available (see the previous question), a notable percentage of Internet users – 18 percent -- said they stopped a subscription for a newspaper or magazine because they now get the same or related content online, a decline from 22 percent in 2008.

**Have you stopped a subscription to a newspaper or magazine
because you got the same or related content online?
(Users Responding Yes)**



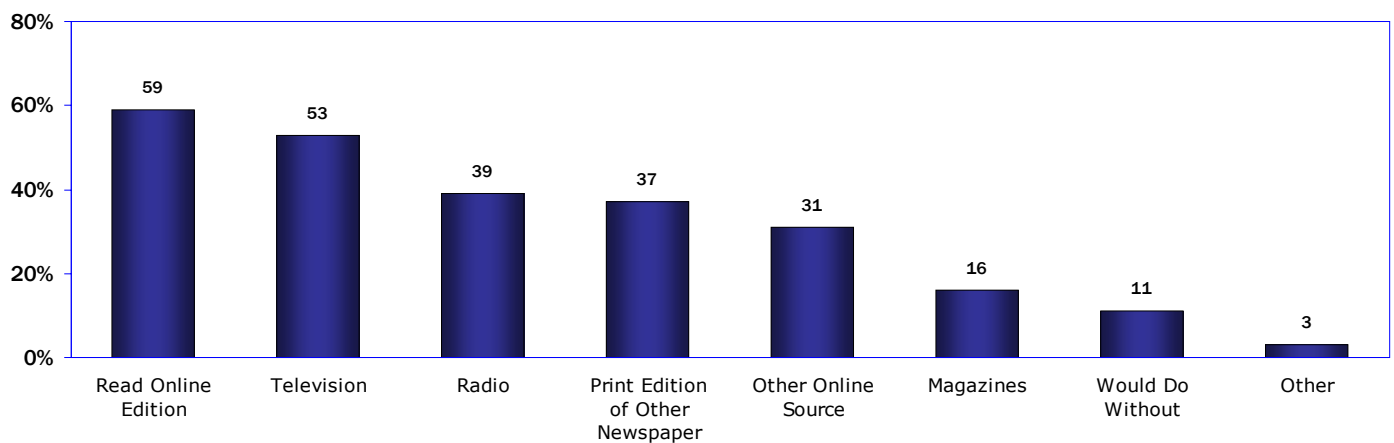
70. Alternatives to Print Newspapers

A new question for the current Digital Future Study found that if the print edition of Internet users' newspaper stopped publishing, most would read the online edition of the publication for the same information.

Fifty-nine percent of Internet users who read newspapers offline said they would read the online edition of a newspaper if the print edition ceased publication. With multiple responses possible, 53 percent said they would seek the information on television, while 39 percent said they would get it from the radio.

Only 37 percent said they would read the print edition of another newspaper if their publication ended its print edition.

**If Your Newspaper Were to Stop Publishing its Print Edition,
Where Would You Go to Get that Information?
(Internet Users Who Read Newspapers Offline)**



(Q704 M-1 2010) (Multiple responses possible)

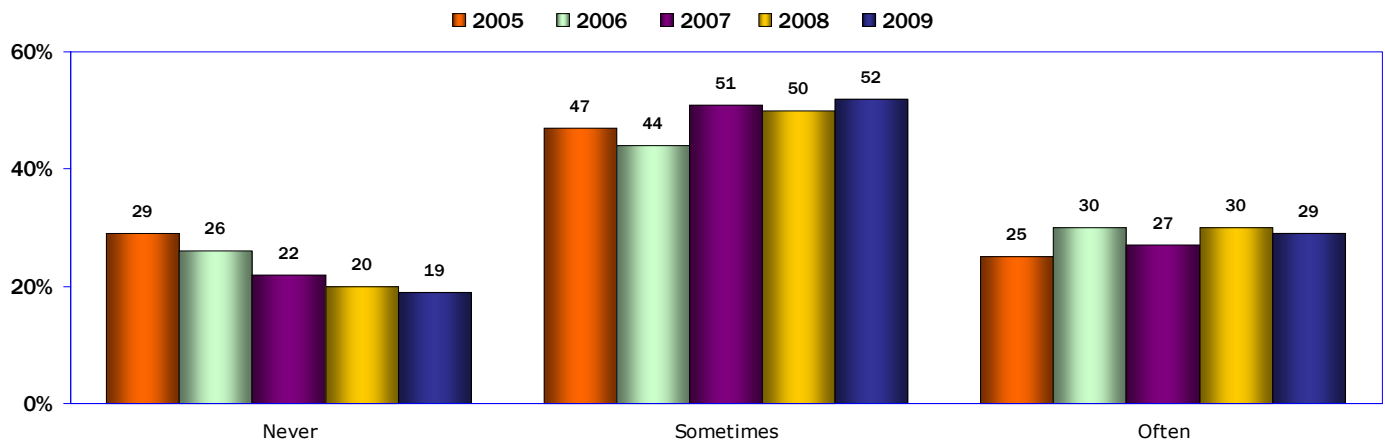
71. Surfing The Web

Web surfing – going online without a specific destination – has been a frequent activity for Internet users, and the percentage of users who surf the Web continues to increase, and has reached the highest level thus far in the Digital Future Project.

Eighty-one percent of Internet users sometimes or often go online without a specific destination in mind.

The percentage of Internet users who never go online without a specific destination has declined in every year this question has been asked, and has now reached a new low in the Digital Future Project.

**How Often Do You Go Online Without a Specific Destination?
(Percentage of Internet Users)**



(Q292 M-1 2010)

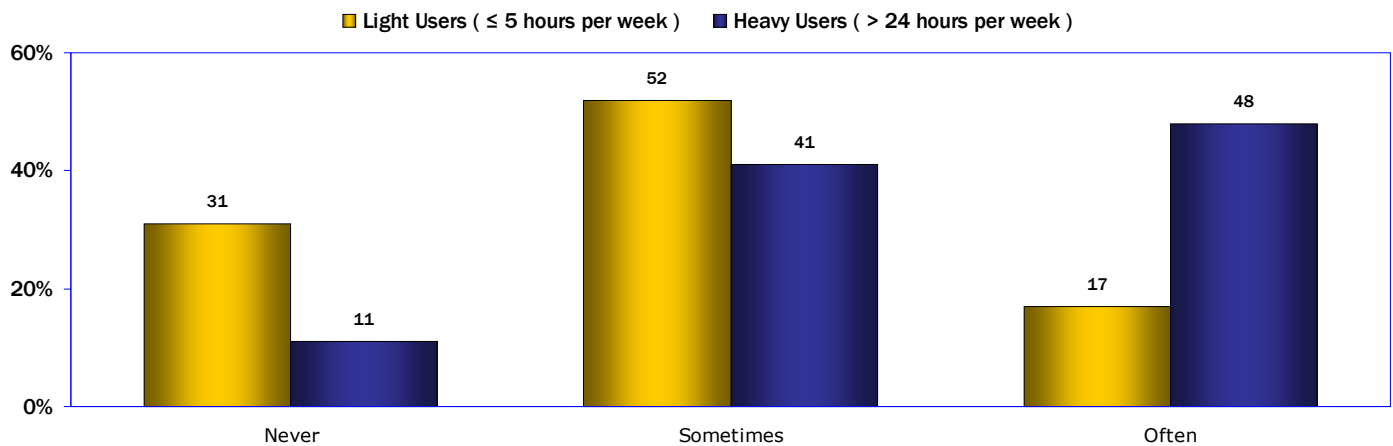
72. Surfing the Web: Light Users vs. Heavy Users

A large percentage of light users and almost 90 percent of heavy users go online without a specific destination.

Eighty-nine percent of heavy users sometimes or often surf the Web without a specific destination, compared to 69 percent of light users.

Almost three times as many light users (31 percent) as heavy users (11 percent) never go online without a specific destination.

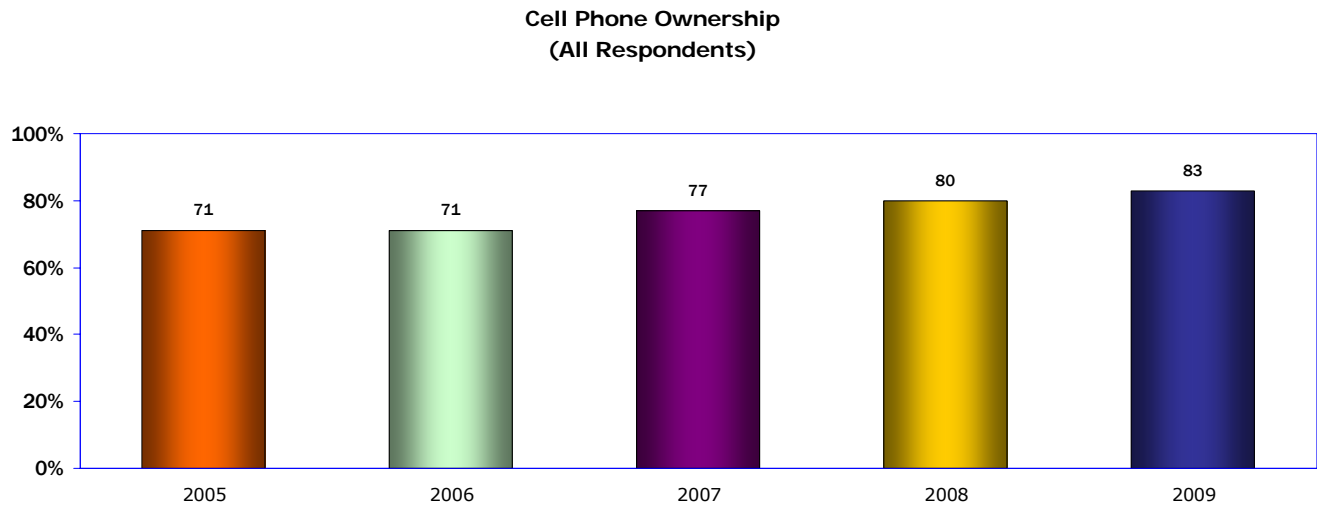
**How Often Do You Go Online Without a Specific Destination?
(Percentage of Light Users vs. Heavy Users)**



(Q292 M-2 2010)

73. Do You Have a Cell Phone?

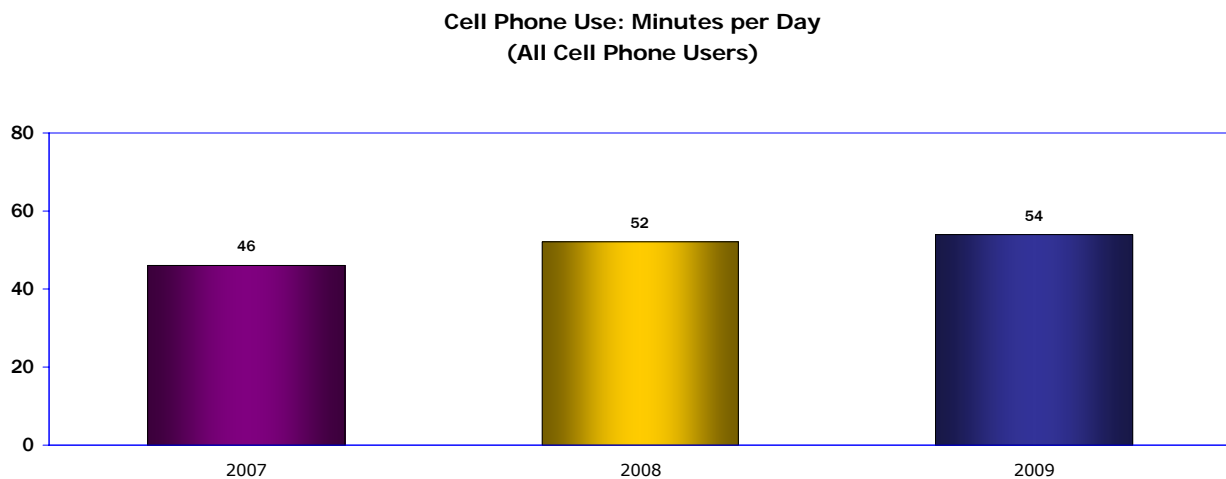
Cell phone ownership has increased four years in row, and has now reached 83 percent of respondents – a new peak thus far for the Digital Future Project.



(Q145 M-2 2010)

74. Cell Phone Use

Overall, daily cell phone use has increased for the second year in a row, increasing to an average of 54 minutes a day, up from 52 minutes in 2008.

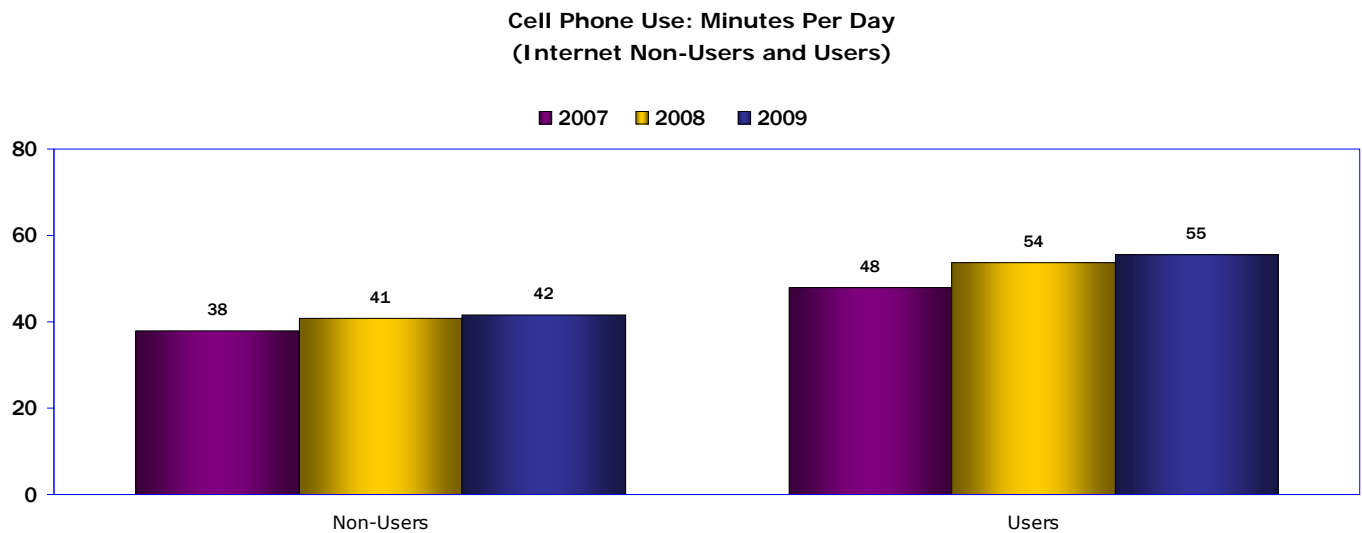


(Q148A (M-1 2010)

75. Cell Phone Use: Users and Non-Users

Internet users and non-users report increased time using their cell phones for the second year in a row, with users reporting nearly an hour a day (55 minutes).

Internet non-users are also active cell phone users; although they spend less time on their cell phones than users, they nevertheless report 42 minutes a day on their phones.

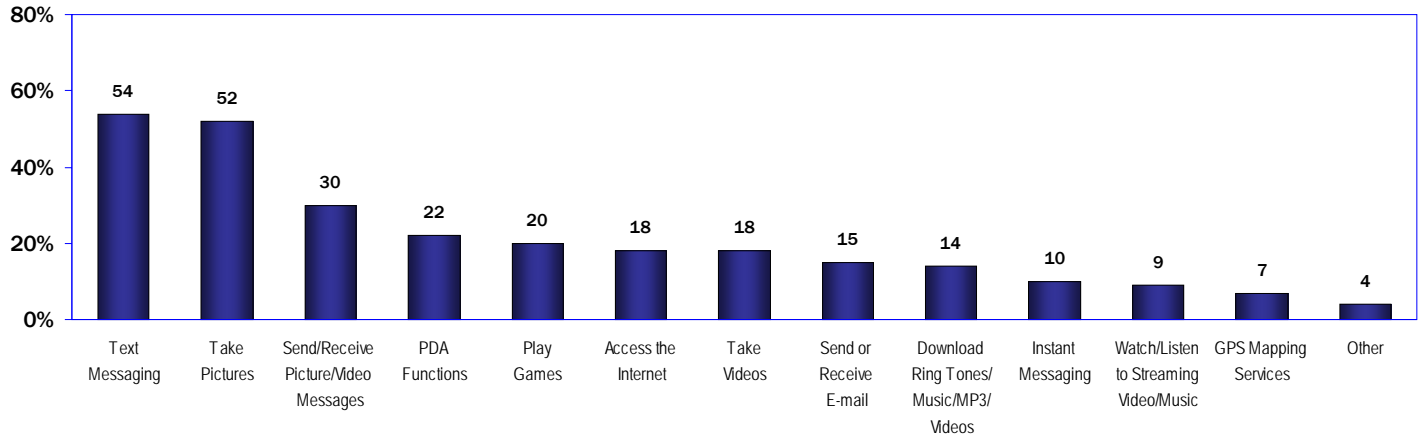


(Q148A M-2 2010)

76. Use of Cell Phone Functions

Of the wide range of cell phone functions besides calling, the two most popular functions reported in the current Digital Future Study are text messaging (54 percent) and taking pictures (52 percent). Sending and receiving photographs or video was reported by 30 percent of cell phone users.

**Use of Cell Phone Functions
(All Cell Phone Users)**

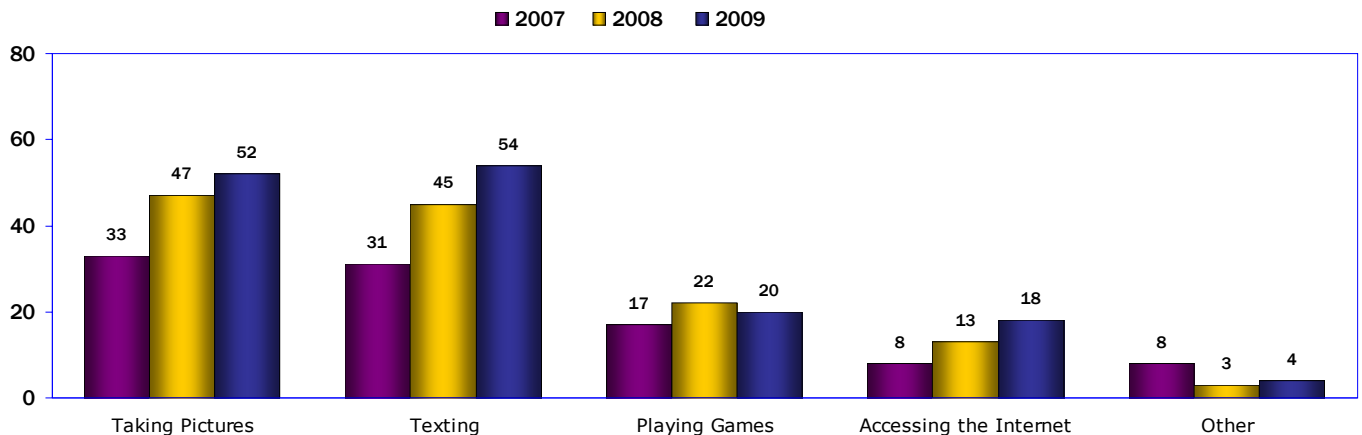


(Q149 M-1 2010)

77. Use of Cell Phone Functions

Use of cell phones for taking pictures, texting, and accessing the Internet has increased significantly in the past three years.

**Use of Cell Phone Functions
(Percentage of All Cell Phone Users)**



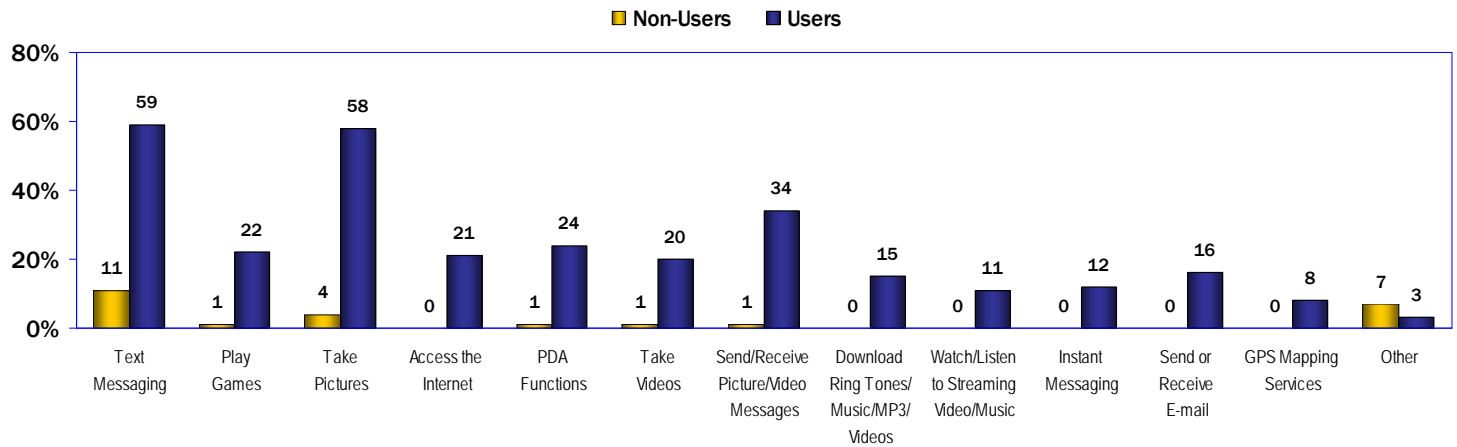
(Q149 M-3 2010)

78. Use of Cell Phone Functions: Non-Users Vs. Users

Much larger percentages of Internet users who have cell phones report accessing phone features other than calling, compared to cell phone users who do not go online.

Nearly six times as many users compared to non-users send text messages on their cell phones, and almost 15 times as many users take pictures with their phones compared to non-users.

Use of Cell Phone Functions
(Percentage of Cell Phone Users, Internet Users Vs. Non-Users)

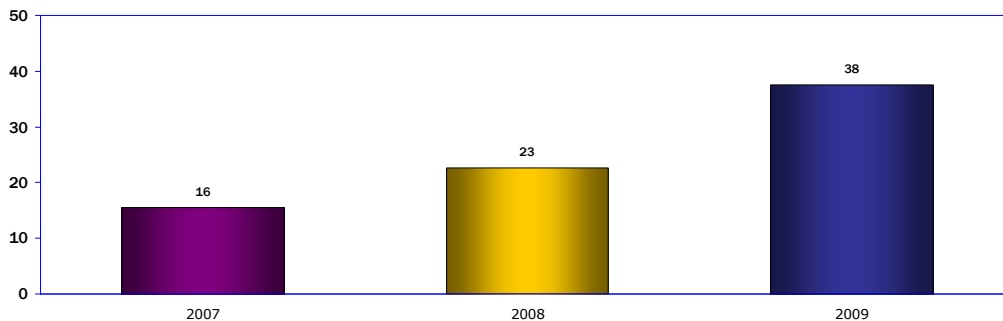


(Q149 M-2 2010)

79. Cell Phones and Text Messages

Text messaging by cell phone users has more than doubled in only two years; overall, cell phone users who send text messages average 38 messages per day, compared to 16 in 2007.

**Texting Messages Sent Per Day
(Cell Phone Users Who Send Text Messages)**



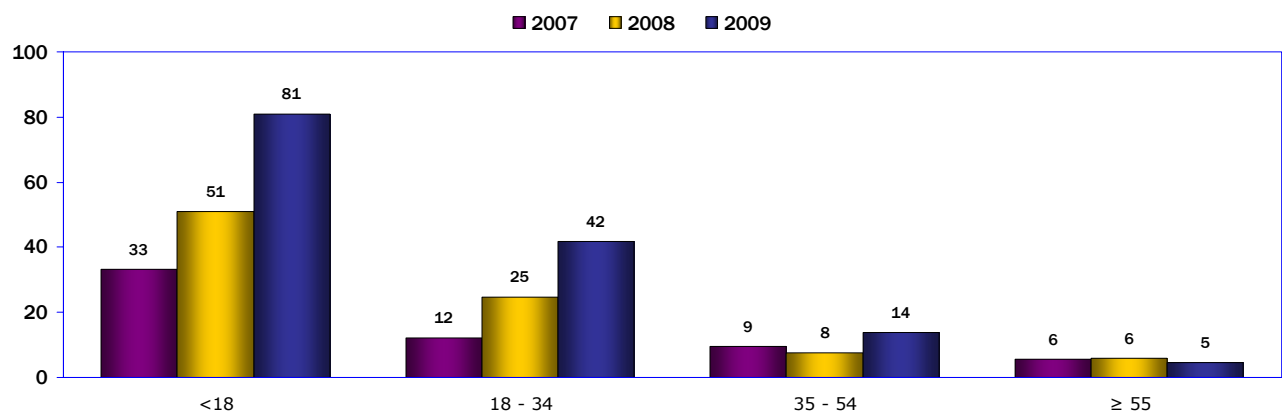
(Q148B M-4 2010)

More specifically, however, text messaging is almost exclusively a medium for young cell phone users.

Of cell phone users who send text messages, the number sent per day is by far the highest among those under 18 -- increasing to 81 per day in the current study, up from 33 per day in 2007.

By comparison, cell phone users age 35 to 54 who send text messages only send an average of 14 messages per day, an increase from nine in 2007. And cell phone users age 55 and over who send text messages average only five per day, a slight decline from 2008.

**Text Messages Sent Per Day
(Cell Phone Users Who Send Text Messages)**



(Q148B M-5 2010)

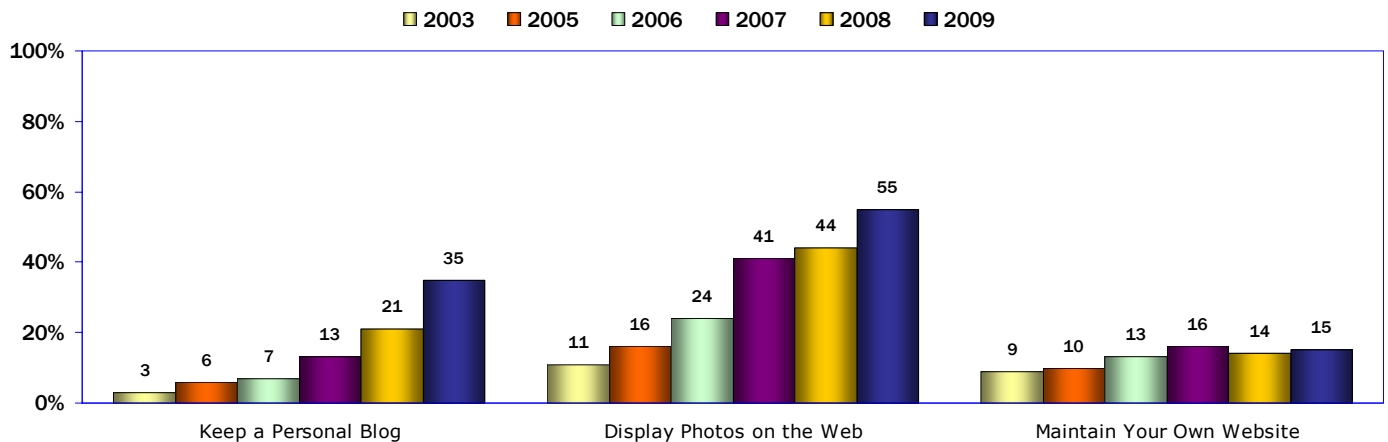
80. Posting Information Online: Blogs, Photos, and Maintaining Personal Web Pages

Content creation and distribution by Internet users on a blog, through a display of photos, or on a personal Web page, continues to increase substantially, while the percentage of respondents maintaining a personal Web site has remained generally stable for three years.

In the current Digital Future study, 55 percent of Internet users said they post photos online – five times more than in 2003. Thirty-five percent of users keep a personal blog – a large jump from the 21 percent reported in 2008, and more than ten times as many as in 2003.

The percentage of Internet users who maintain a personal Web site has changed little since 2006 – perhaps a result of the large growth in personal blogs, which can be simpler to post. Fifteen percent of Internet users said that they maintain their own Web site, up marginally from 14 percent reported in 2008.

Posting Information Online: Blogs, Photos, Personal Web Sites
(Percentage of Internet Users)



(Q711 M-1 2010)

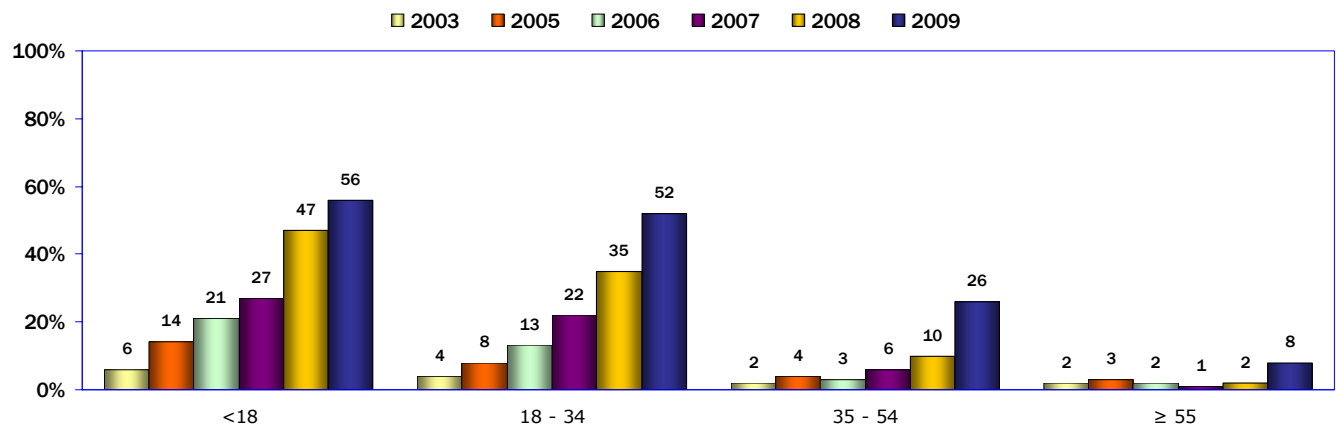
8I. Posting Information On Personal Blogs, and Posting Photos (By Age)

The younger the Internet users, the more likely they are to post personal information online – whether that means a personal blog or posting photos. However, the current Digital Future Study found that users in all age ranges are much more likely to post photos than keep a personal blog.

Although Internet users of all ages post blogs, the younger the users are, the more likely they are to keep a personal blog; only eight percent of users age 55 and over keep a blog, compared to more than half of users under 34.

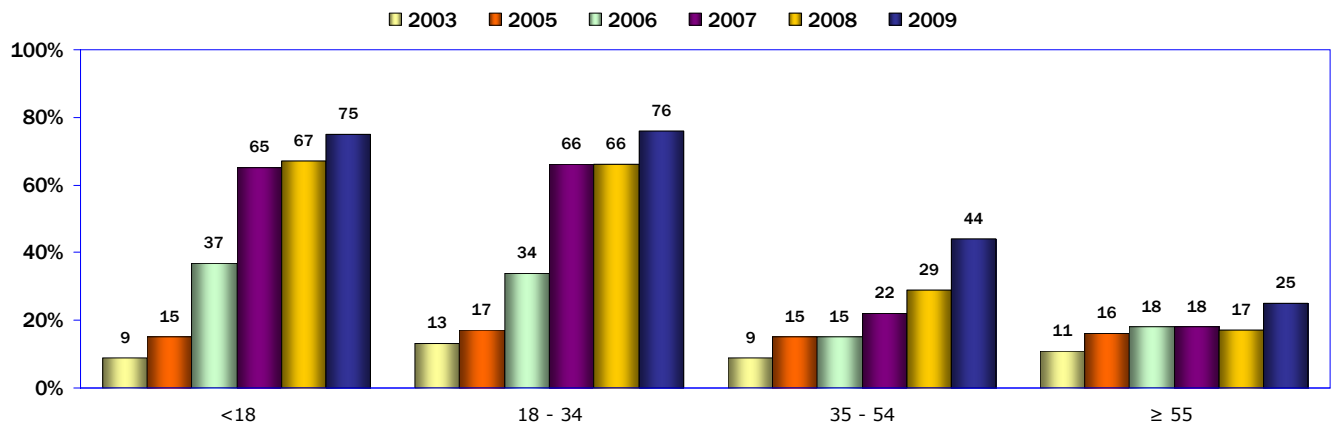
However, more than three times as many users 55 and over said they post photographs online (25 percent post photos, but only eight percent keep a personal blog). And a larger percentage of users ages 35-54 post photographs online, compared to those who keep personal blogs (44 percent vs. 26 percent).

Do You Keep A Personal Blog?
(Percentage of Internet Users By Age)



(Q711 M-2 2010)

Do You Display Photos Online?
(Percentage of Internet Users)



(Q711 M-3 2010)

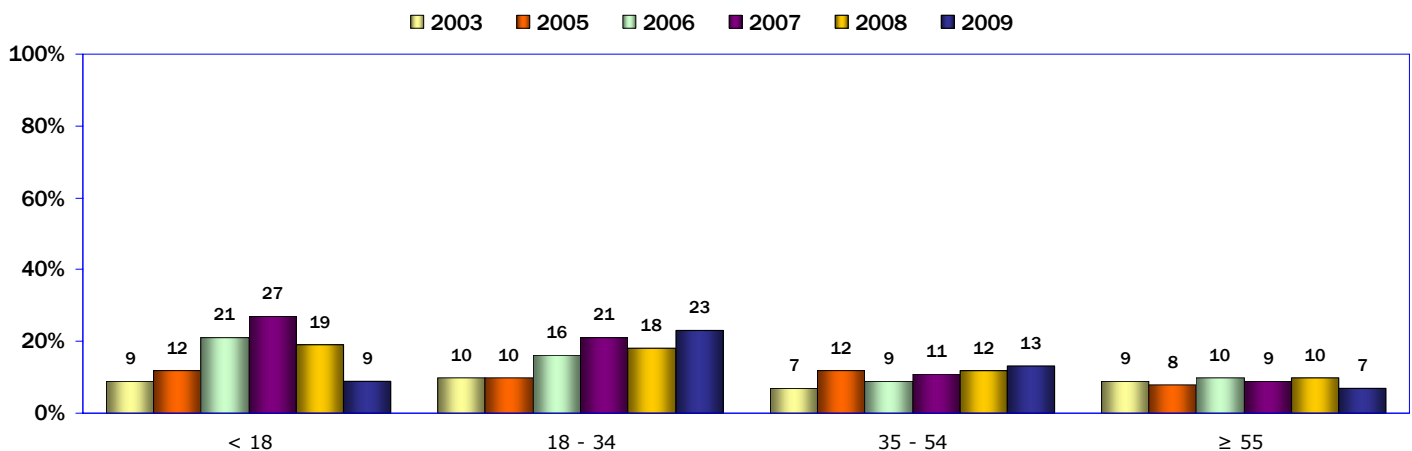
82. Maintaining Personal Web Sites (by age)

While overall, the percentage of users who maintain their own Web sites is remaining generally stable (*see page 100*), in some age ranges it is dropping – in particular among the youngest users.

The percentage of users under 18 who maintain a personal Web site dropped by more than half in the current study, and is now under 10 percent of users in this age range (nine percent) – a likely result of the explosive growth of social media sites such as Facebook that serve as an alternative to a personal Web page (*see page 103*).

At the other end of the age spectrum, the percentage of users age 55 and older who maintain their own Web sites is also declining – to seven percent in the current study. In between the contrasting age ranges, the percentage of users age 18 to 34 rose in the current study to 23 percent, up from 18 percent in 2008. Among users 35 to 54, the percentage who maintain a personal Web site grew marginally, to 13 percent, up from 12 percent in 2008.

**Do You Maintain Your Own Web Site?
(Percentage of Internet Users)**



(
Q711 M-4 2010)

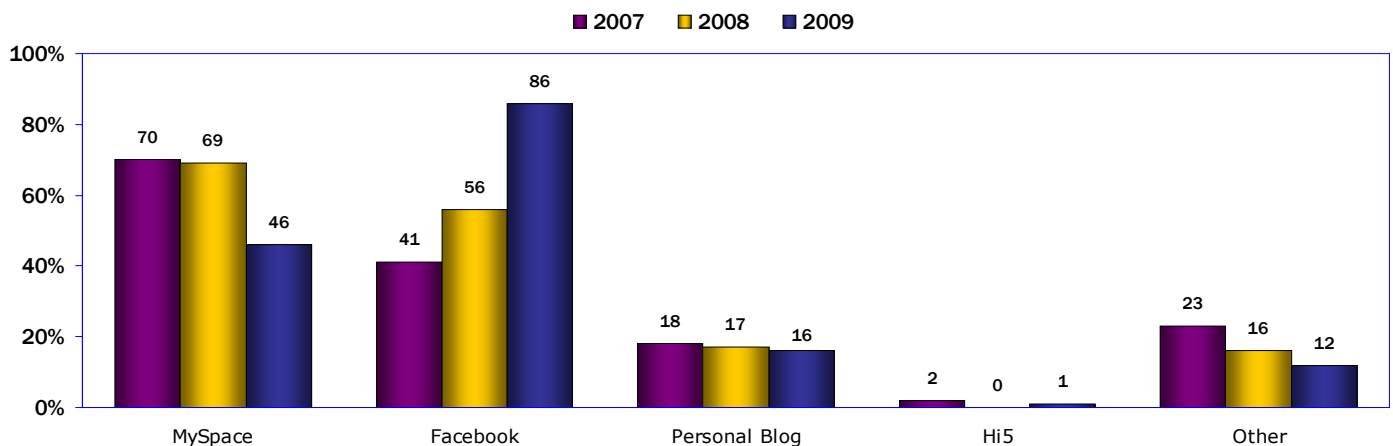
83. Personal Profiles: Where are They Located?

Using Facebook as a site to host a personal profile online increased dramatically in the current Digital Future Study, growing by almost one-third, while use of MySpace declined by almost one-quarter.

Eighty-six percent of users who maintain a personal profile online now do so on Facebook, up from 56 percent in 2008. Forty-six percent keep a profile on MySpace, down from 69 percent in 2008.

The percentage who keep their personal profile on a blog declined marginally in the current study to 16 percent, down from 17 percent in 2008.

Where Do You Keep Your Personal Profile?
(Percentage of Internet Users Who Keep a Personal Blog/Profile)



(Q712 JC-1 2010) (Multiple responses possible)

Consumer Behavior

Adult Internet users who buy online **65%**

Average online purchases per year **35.2**

Internet users who said that online purchasing has reduced their buying in traditional retail stores somewhat or a lot **61%**

Respondents who are very concerned or extremely concerned about the privacy of personal information when buying online **54%**

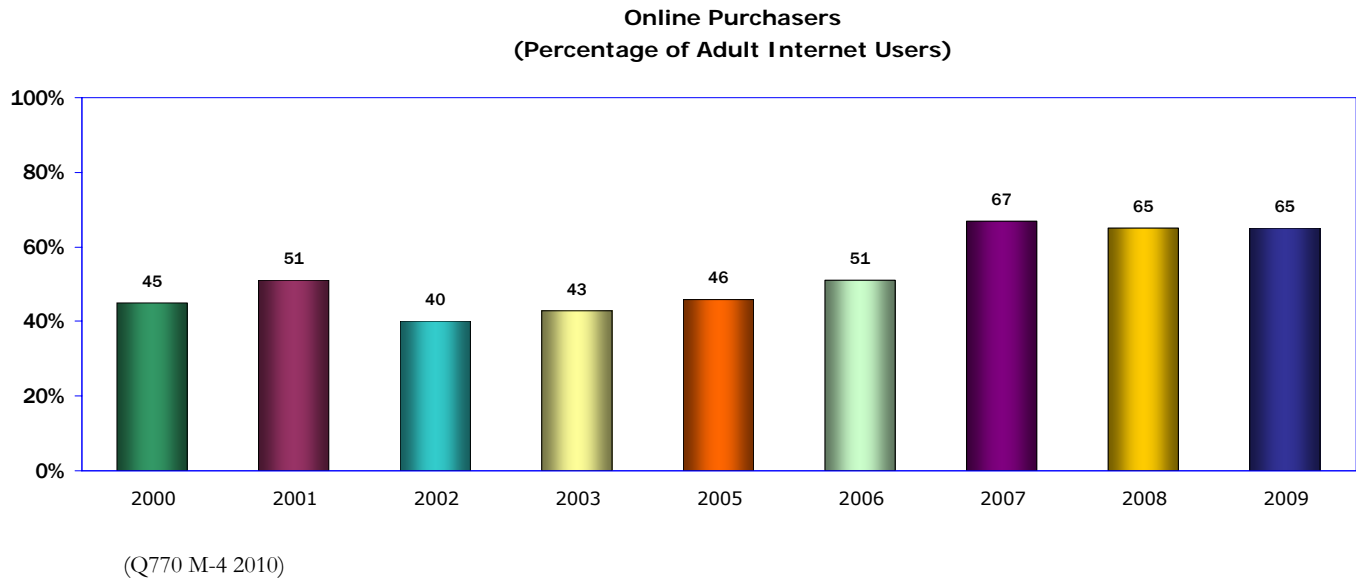
Respondents who are very concerned or extremely concerned about the security of credit card information when buying online **50%**

Internet users who never click on Web advertisements **50%**

Internet users who would rather see Web advertising than pay for content **55%**

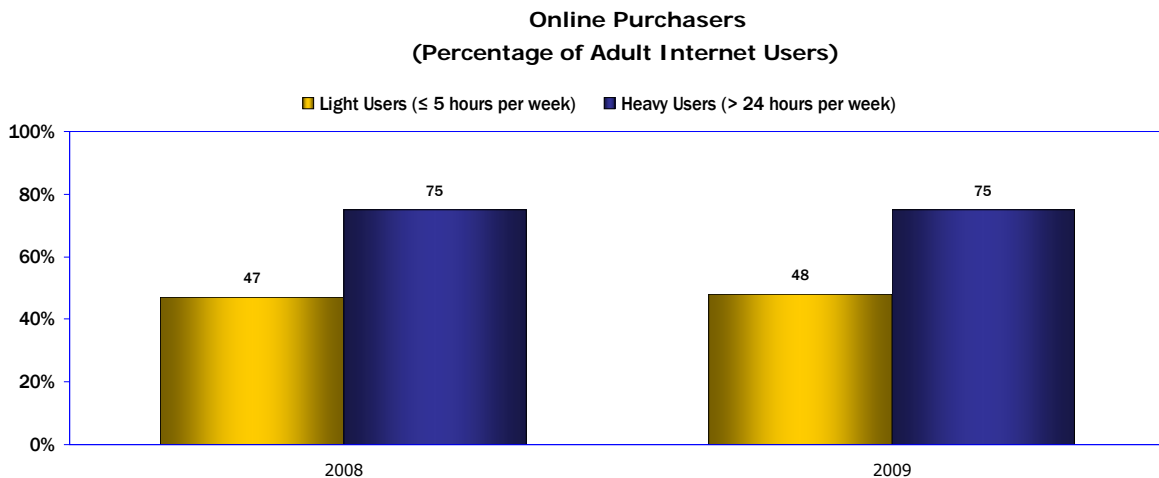
84. Who Is Buying Online?

In spite of the slumping economic conditions last year, almost two-thirds (65 percent) of Internet users continue to buy online – the same percentage as in 2008.



85. Who Is Buying Online: Light Users Vs. Heavy Users

Three-quarters of heavy users buy online -- the same percentage as in 2008. Among light users, 48 percent buy online, marginally up from 47 percent in 2008.



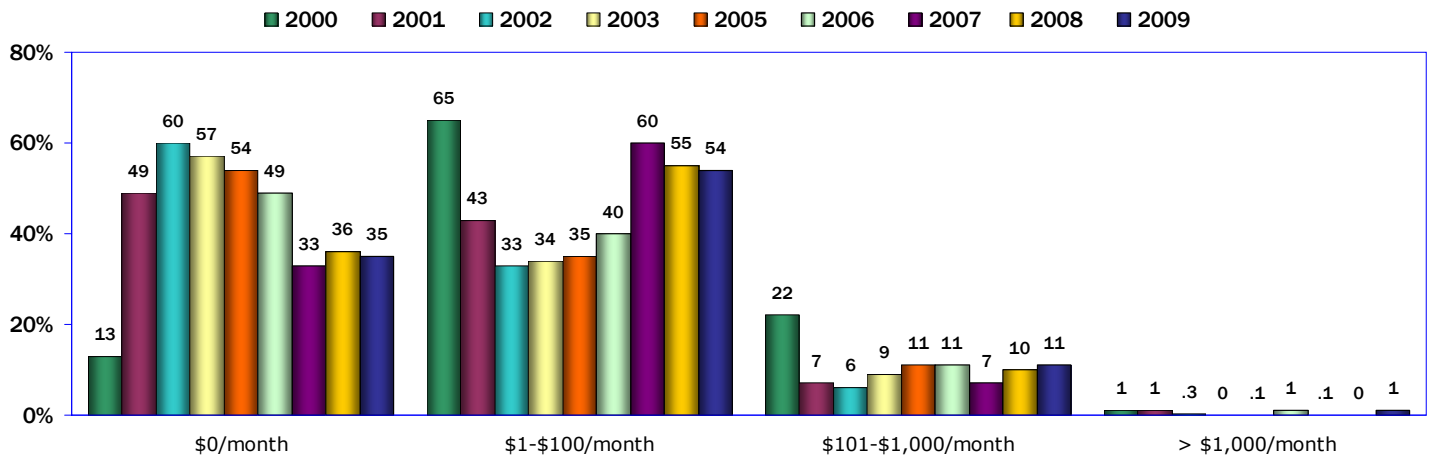
(Q770 M-5 2010)

86. How Much are Online Purchasers Spending?

Fifty-four percent spend \$1 to \$100 per month, down marginally from 55 percent in 2008. Those who spend more than \$100 but less than \$1,000 per month online increased to 11 percent, up from 10 percent.

The percentage of users who spend more than \$1,000 per month increased in the current study to one percent of online buyers, up from near-zero in 2008.

**Average Monthly Purchasing
(Percentage of Adult Internet Users)**



(Q770 M-3 2010)

87. Types of Online Purchases

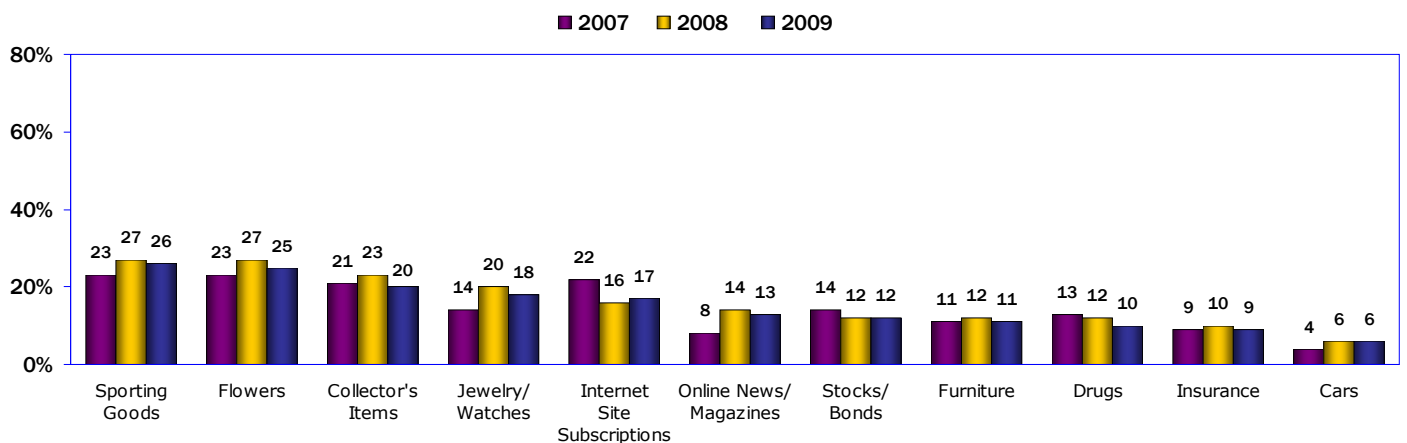
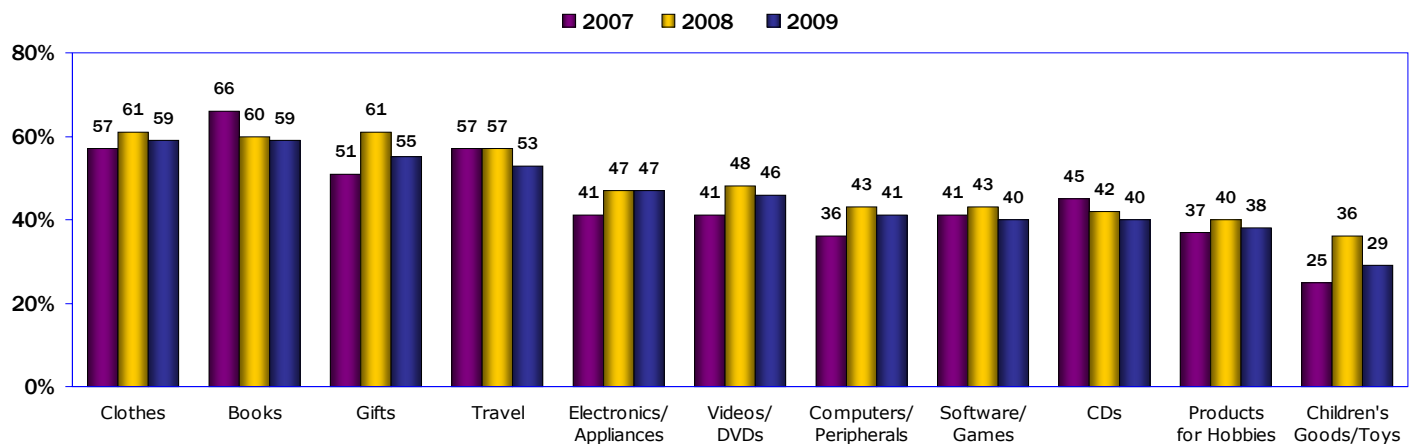
The percentages of users who bought in almost every category of online purchase declined or remained stable in the current Digital Future Study.

The most popular online purchases are books (purchased by 59 percent of online buyers, and down slightly from 60 percent in 2008), and clothes (also purchased by 59 percent of online buyers, down from 61 percent in 2008).

The other two categories cited by more than half of Internet buyers were gifts (55 percent, down from 61 percent in 2008), and travel arrangements (53 percent, down from 57 percent in 2008).

Categories mentioned by 40 to 50 percent of Internet buyers were electronic goods (47 percent), videos or DVDs (46 percent), computers or peripherals (41 percent), software (40 percent), and CDs (40 percent).

Most Popular Online Purchases
(Percentage of Internet Users Who Buy Online)

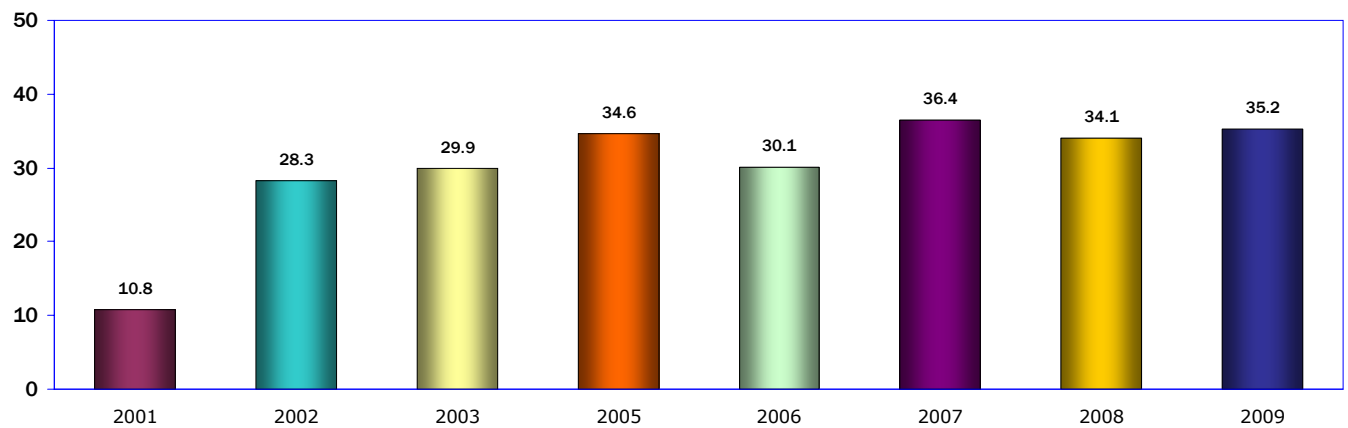


(Q810 M-2)

88. Online Purchasing Frequency

The average number of annual online purchases for Internet users age 18 and above increased slightly in the current Digital Future study to slightly more than 35 purchases, down slightly from the peak of 36.4 purchases in 2007.

**Online Purchasing Frequency
(Annual Purchases by Adults)**



(Q 780 M-1 2010)

89. Privacy Concerns when Buying Online

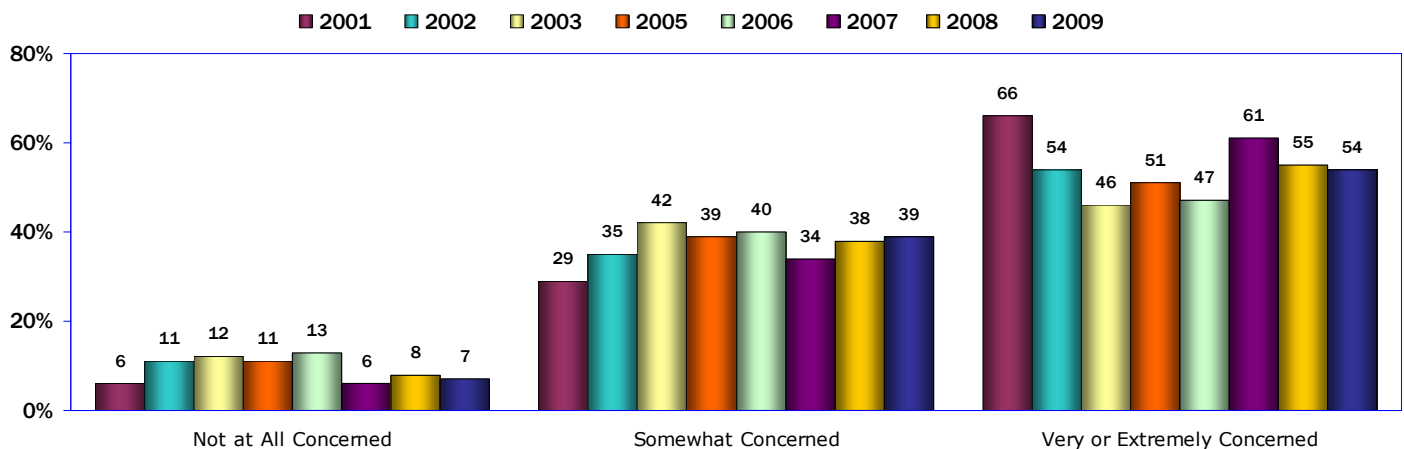
Very high levels of concern about privacy and security when or if buying online have been reported in all of the studies in the Digital Future Project. Looking at the views of all respondents (*for current Internet buyers, see page 111*), the level of concern is near its peak thus far in the current Digital Future project.

Concern had been declining slightly from 2001 to 2006. Then in 2007, the level of concern began to grow again.

In the current study, 93 percent of all respondents report some level of concern about the privacy of personal information when or if buying online (somewhat, very, or extremely concerned), the same as in 2008, and almost as high as the 95 percent in 2007.

However, other questions in the study show that concern decreases as Internet use increases (*see page 110*).

Concerns about Privacy of Personal Information when or if Buying Online
(Percentage of All Respondents, Age 16 or Older)

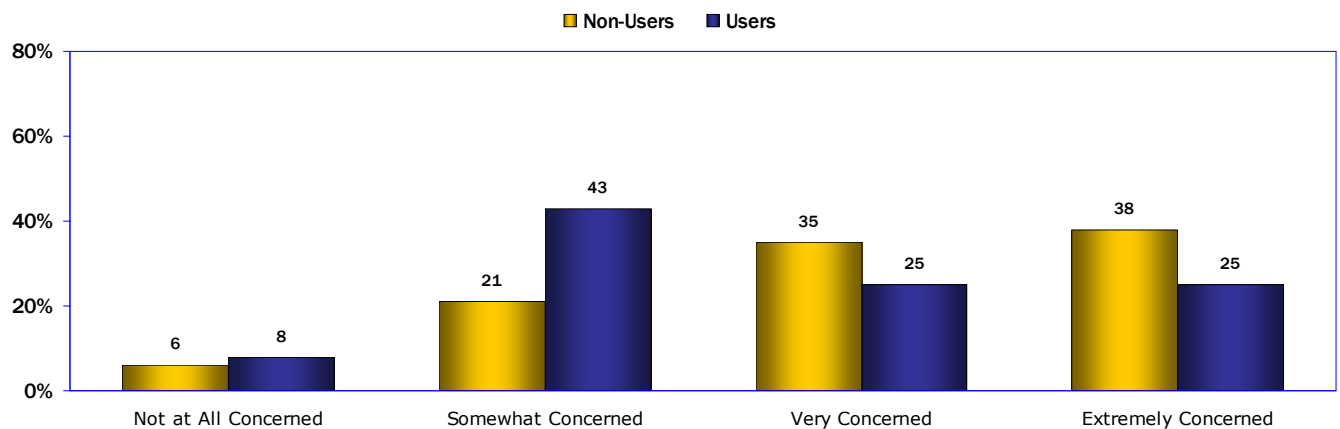


(Q840 M-1 2010)

90. Privacy: Comparing Concerns among Users vs. Non-Users

Internet users and non-users continue to express disparate views about privacy of personal information when or if buying online. While overall levels of concern are nearly identical among users (93 percent) and non-users (94 percent), only half of Internet users report the highest level of concern (very concerned or extremely concerned) compared to 73 percent of non-users.

Concerns about Privacy Of Personal Information when or if Buying Online
(Percentage of Respondent Age 16 and Older: Internet Users vs. Non-Users)

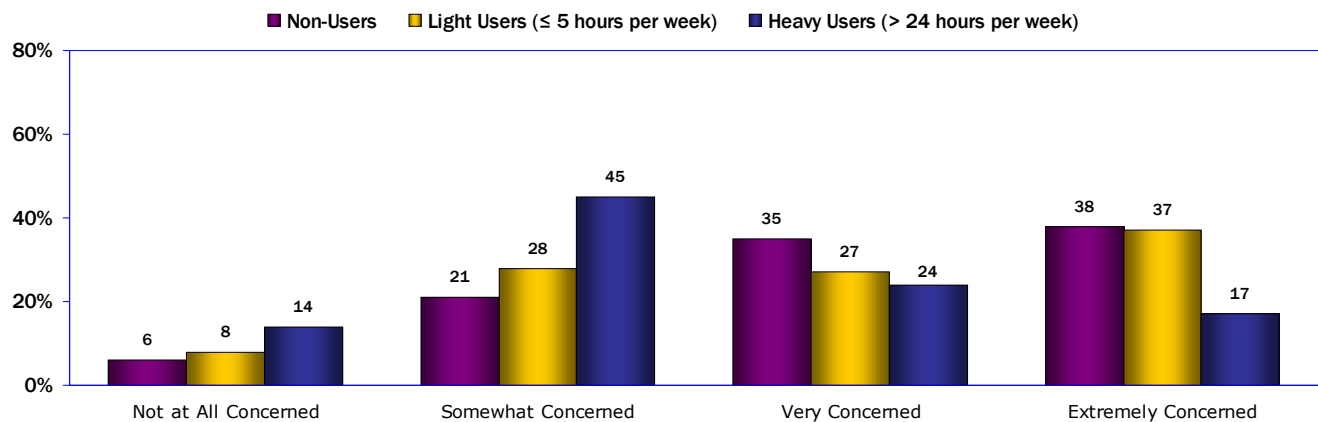


(Q840 M-2 2010)

91. Privacy: Comparing Concerns Among Non-Users, Light Users, and Heavy Users

Looking at the views of non-users, light users, and heavy users shows that concerns about privacy of personal information decreases as Internet use increases. Among those who are very concerned or extremely concerned, non-users report the largest percentage (73 percent), followed by light users (64 percent), and heavy users (41 percent).

Concerns about Privacy of Personal Information when or if Buying Online
(Percentage of Internet Non-Users, Light Users, Heavy Users)



(Q840 M-3 2010)

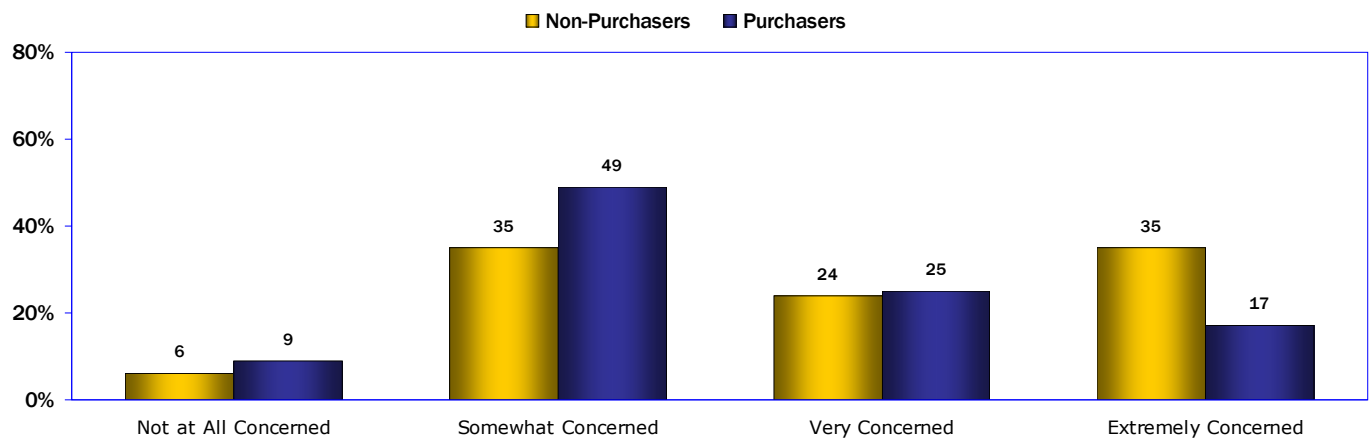
92. Privacy Concerns: Internet Non-Purchasers vs. Purchasers

Internet purchasers and non-purchasers report wide differences in views about the highest levels of concern for the privacy of personal information when or if buying online.

Forty-two percent of Internet purchasers are very or extremely concerned about privacy information when or if buying online, compared to 59 percent of non-purchasers.

However, when looking at those who are not at all concerned about privacy of personal information when or if buying online, there is little difference in the low percentages of Internet purchasers (nine percent) and non-purchasers (six percent).

**Concerns about Privacy of Personal Information when or if Buying Online
(Internet Purchasers vs. Non-Purchasers)**



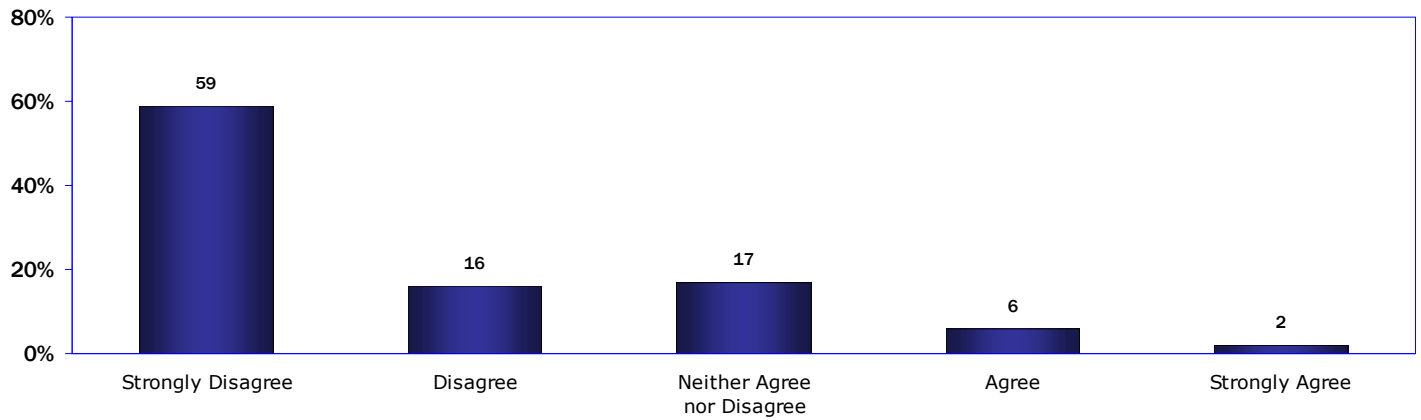
(Q840 M-4 2010)

93. Would Users Reveal Personal Information in Exchange for Services or Content?

Given the large percentages of respondents expressing concern about privacy of information online, it is not surprising that only eight percent of users said they would be willing to reveal personal information online in exchange for extra services and content.

Three-quarters of users disagreed or strongly disagreed with the idea of revealing personal information online in exchange for more services or content.

**I Would be Willing to Reveal Personal Information Online
in Exchange for Extra Services and Content
(Percentage of Internet Users)**



(Q533 M-7)

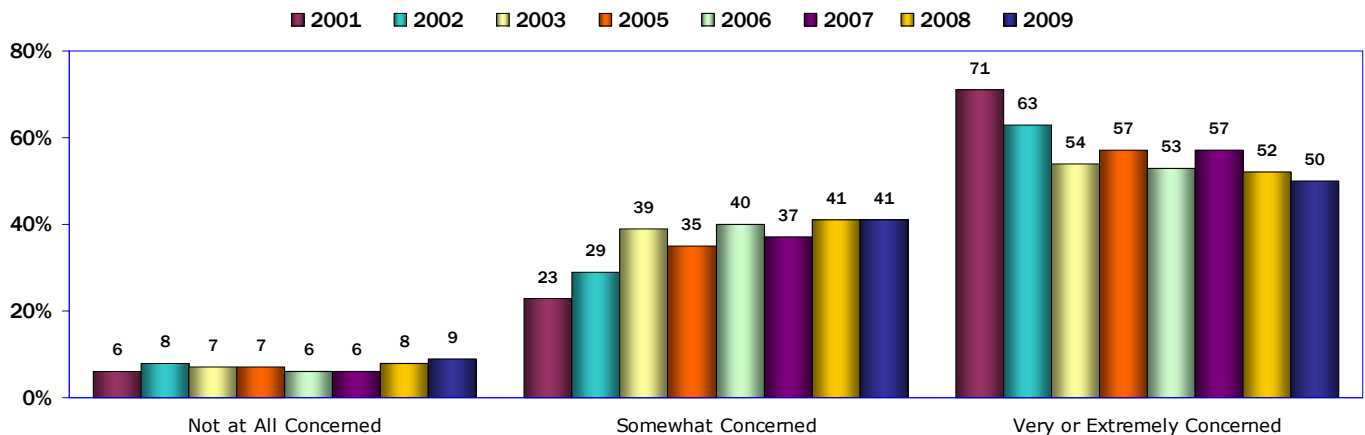
94. Credit Card Information: Concerns about Security

Concerns about credit card security when or if buying online have been high among all respondents in all of the Digital Future studies, but the highest levels of concern (very or extremely concerned) have been in a general decline since this question was first asked in 2001.

In the current study, half of all respondents said they are very concerned or extremely concerned about the security of credit card information when or if buying online, down from 52 percent in 2008 and 57 in 2007, and 21 percentage points below 2001, the first year this question was asked in the Digital Future Project.

Most of the movement in responses about credit card security are among respondents whose views have changed from very or extremely concerned to somewhat concerned. Respondents who said they are somewhat concerned about credit card security when or if buying online have increased from 23 percent in 2001 to 41 percent in the current study.

**Concerns about Credit Card Security when or if Buying Online
(Percentage of Adult Respondents)**



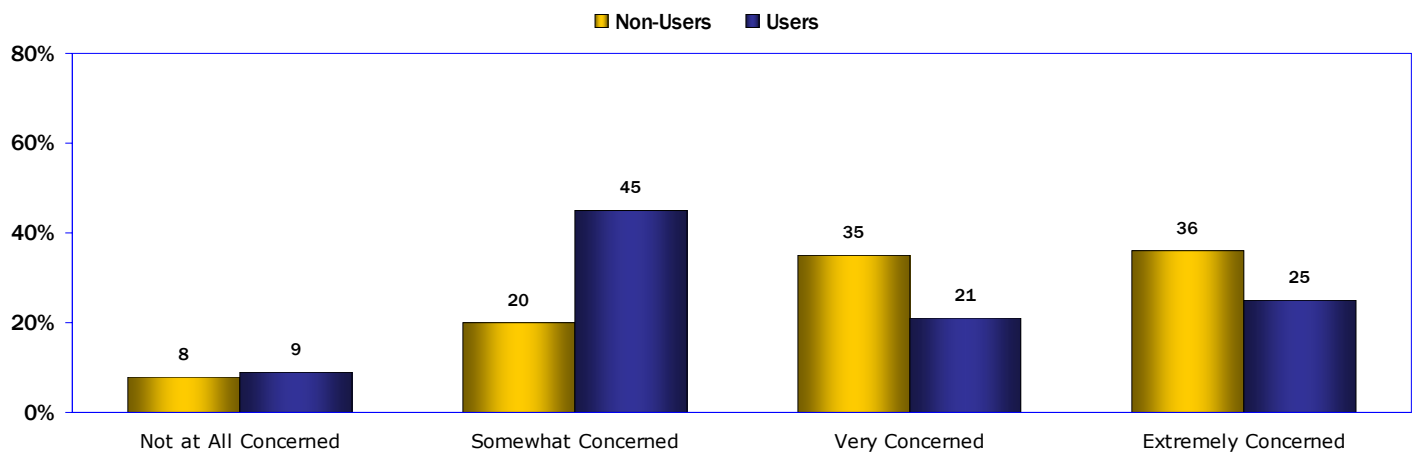
(Q830 M-1 2010)

95. Credit Card Information: Comparing Concerns among Users And Non-Users

In responses similar to findings about the security of personal information when or if buying online (*see page 110*), much larger percentages of Internet non-users than users said they are very concerned or extremely concerned about credit card security when or if buying online.

Forty-six percent of users in the current Digital Future Project said they are very concerned or extremely concerned about their credit card information when or if buying online, compared to 71 percent of non-users who report the same response.

**Concerns about Credit Card Security when or if Buying Online
(Percentage of Adult Users vs. Non-Users)**



(Q830 M-2 2010)

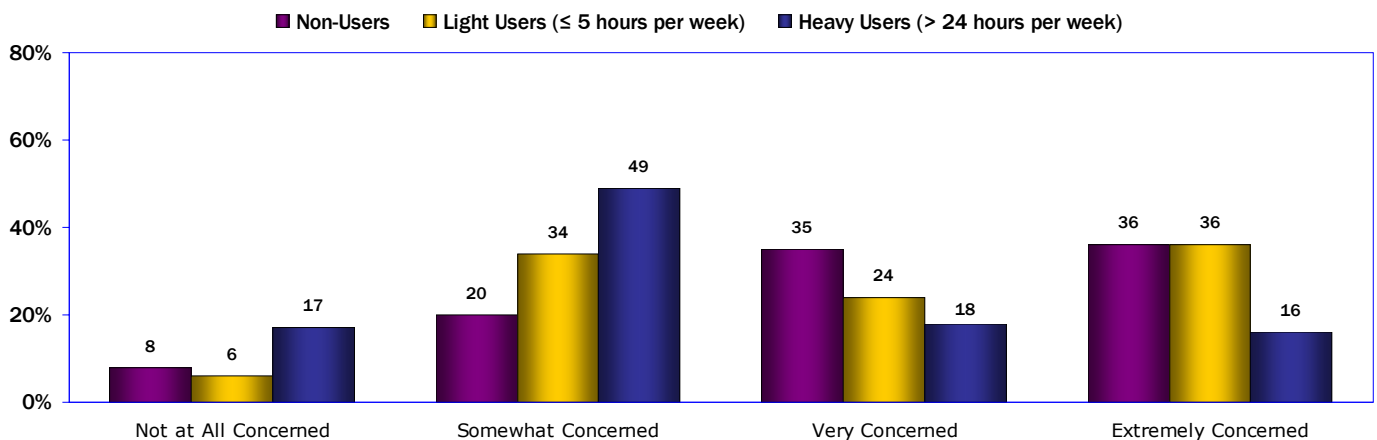
96. Credit Card Information: Comparing Concerns among Non-Users, Light Users, Heavy Users

As with concerns about online privacy when buying online (*see page 110*), comparing how non-users, light users, and heavy users feel about the security of their credit card information when or if buying online shows that the highest levels of concern decrease as Internet use increases.

In the current Digital Future Project, 34 percent of heavy users said they are very concerned or extremely concerned about credit card security when or if buying online -- compared to 60 percent of light users and 71 percent of non-users.

Comparing respondents who have no concerns about credit card security: a much larger percentage of heavy users (17 percent) compared to either light users (six percent) or non-users (eight percent) have no concerns about credit card security when or if buying online.

**Concerns about Credit Card Security when or if Buying Online:
(Percentage of Adult Non-Users, Light Users, Heavy Users)**



(Q830 M-3 2010)

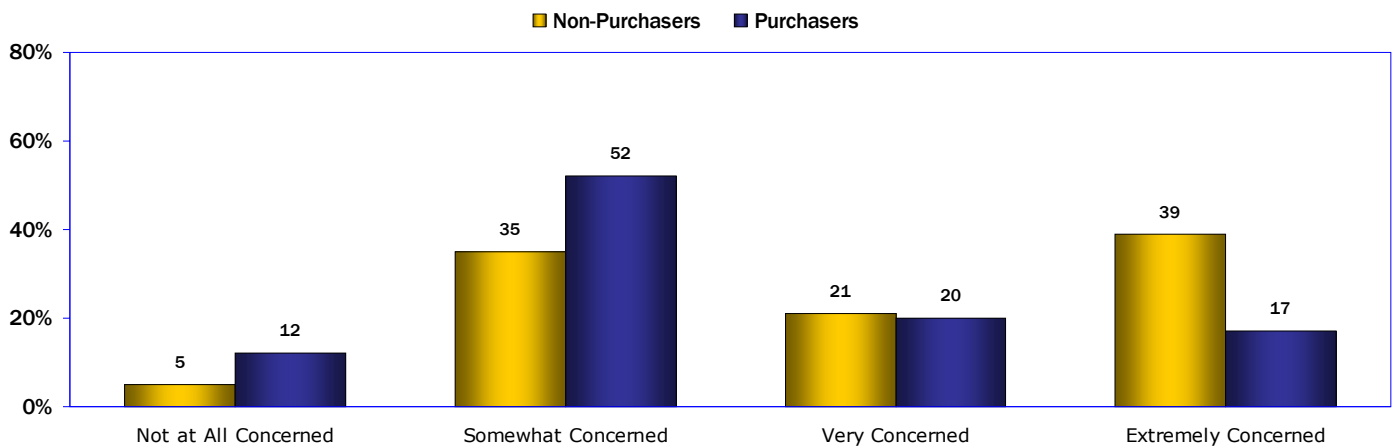
97. Credit Card Information: Comparing Concerns among Non-Purchasers And Purchasers

Non-purchasers in the current Digital Future Study report much higher levels of concern than purchasers about credit card security.

Among online purchasers, 37 percent said they are very concerned or extremely concerned about credit card security when or if buying online, while 60 percent of non-purchasers report the same level of concern.

More than twice the percentage of purchasers (12 percent) than non-purchasers (five percent) said they were not at all concerned about credit card security when or if they buy online.

**Concerns about Credit Card Security when or if Buying Online
(Percentage of Adult Non-Purchasers Vs. Purchasers)**



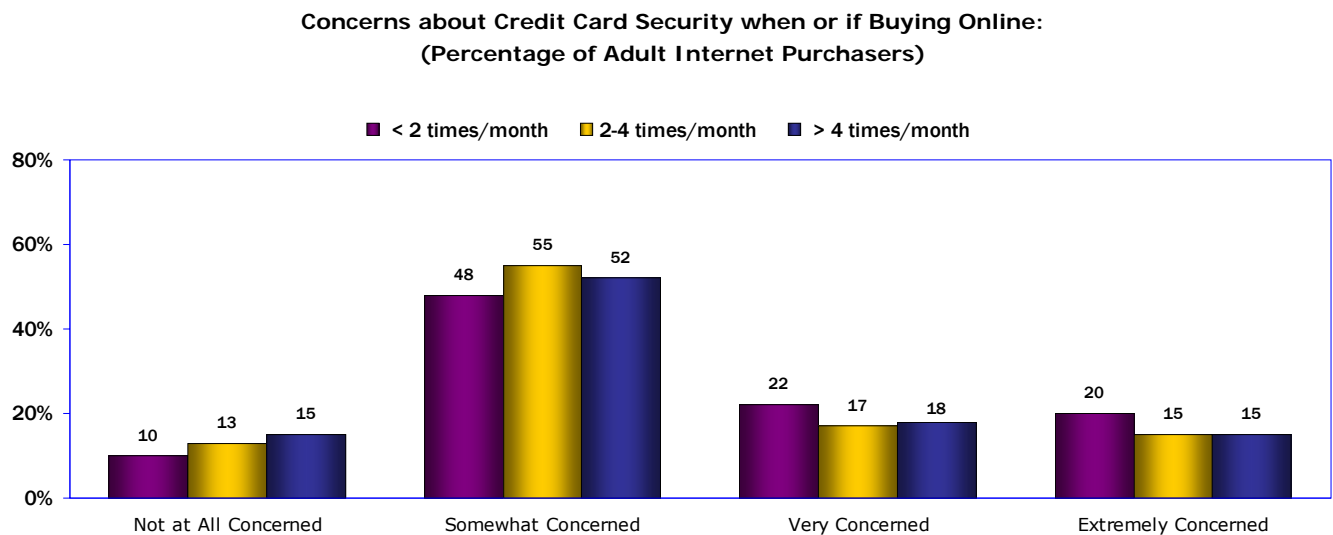
(Q830 M-4 2010)

98. Credit Card Security: Comparing Concerns Based on Frequency of Purchasing

Although the frequency of online use relates to reduced concerns about credit card use (*see page 115*), the number of online purchases plays only a limited role in concerns about credit card security.

Thirty-three percent of users who buy online more than four times per month are very concerned or extremely concerned about credit card security on the Internet, compared to 32 percent of users who buy 2-4 times per month, and 42 percent of those who buy less than twice a month.

Looking at those who are not at all concerned, 15 percent of those who buy more than four times per month said they have no concerns about credit card security when they buy online, compared to 13 percent of users who buy 2-4 times per month and 10 percent of those who buy less than twice per month who had the same response.



(Q830 M-6 2010)

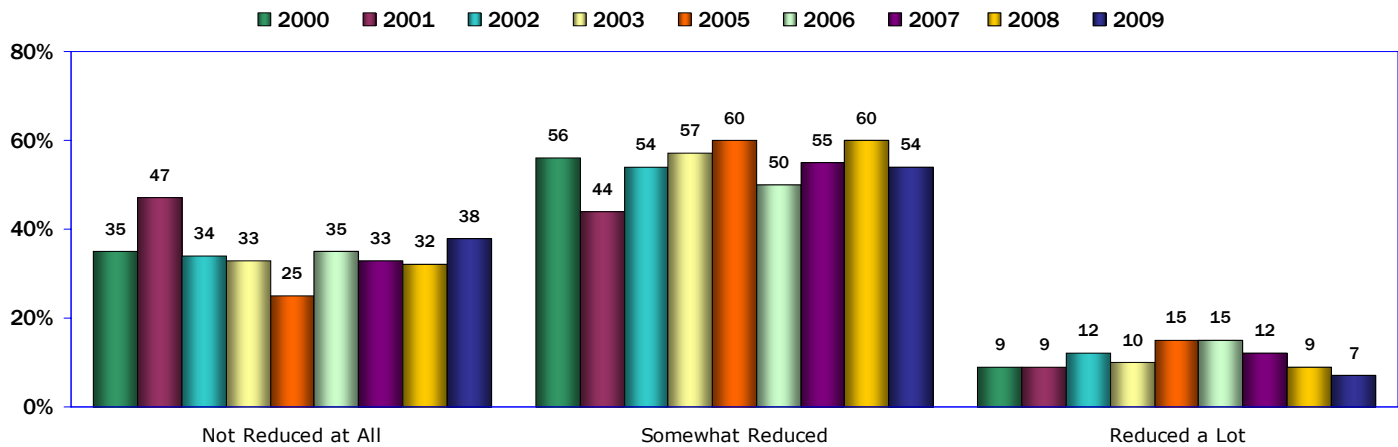
99. Buying Online: Effects on Traditional Retail Purchasing

A still-large but declining percentage of online purchasers said that their purchasing online has reduced their buying in retail stores.

Sixty-one percent of Internet users who buy online said their online purchasing reduces their buying in traditional retail stores somewhat or a lot – down from 69 percent in 2008 and 67 percent in 2007.

The percentage who said that their purchasing was not reduced at all increased to 38 percent of online purchasers – the second-highest level in the Digital Future Studies.

Does Buying Online Affect Purchasing in Traditional Retail Stores?
(Percentage of Internet Users Who Buy Online)



(Q860 M-1 2010)

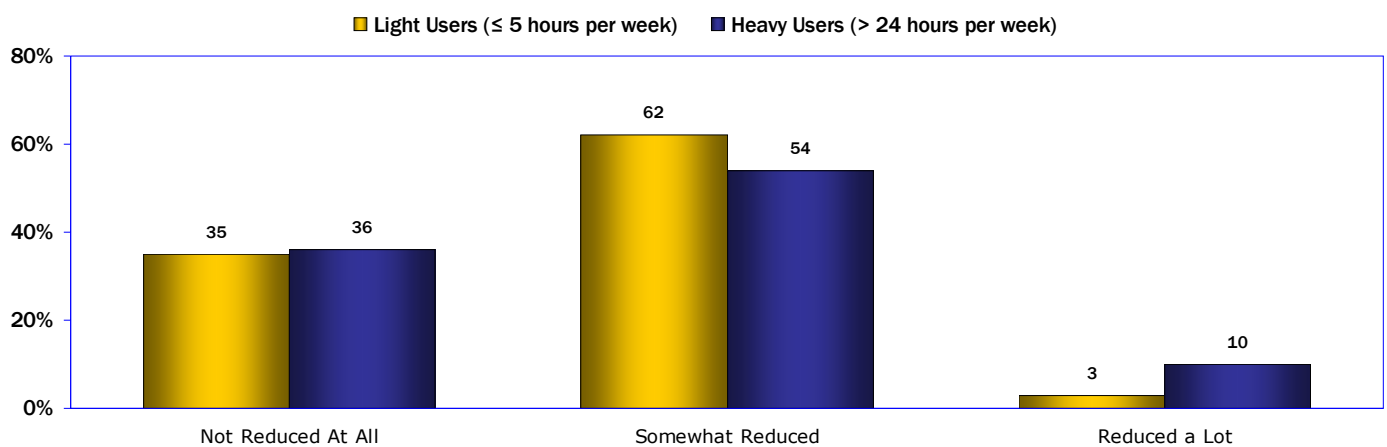
100. Buying Online: Effects on Traditional Retail Purchasing

Light Users Vs. Heavy Users

Nearly identical percentages of light users and heavy users said that their online buying has affected purchasing in traditional retail stores.

Sixty-five percent of light users and 64 percent of heavy users said that online purchasing has reduced their purchases in traditional stores somewhat or a lot.

Does Buying Online Affect Purchasing in Traditional Retail Stores?
(Percentage of Internet Users Who Buy Online: Light Users vs. Heavy Users)



(Q860 M-2 2010)

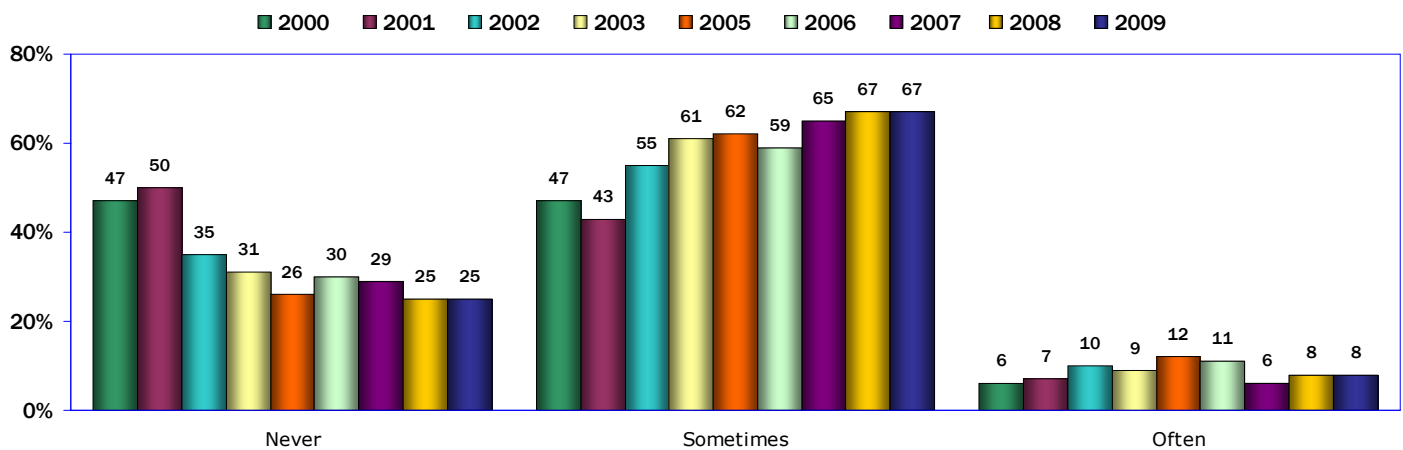
101. Browsing for Products: Retail Stores vs. The Internet

Although large percentages of Internet users buy online (*see page 175*), even larger percentages continue to use the Web as a reference service before purchasing locally.

In the current Digital Future Study, large and generally stable percentages of Internet users said they browse in stores and then buy online, and vice versa.

Three-quarters of Internet purchasers said they sometimes or often browse in traditional retail locations and then buy online – the same as in 2008.

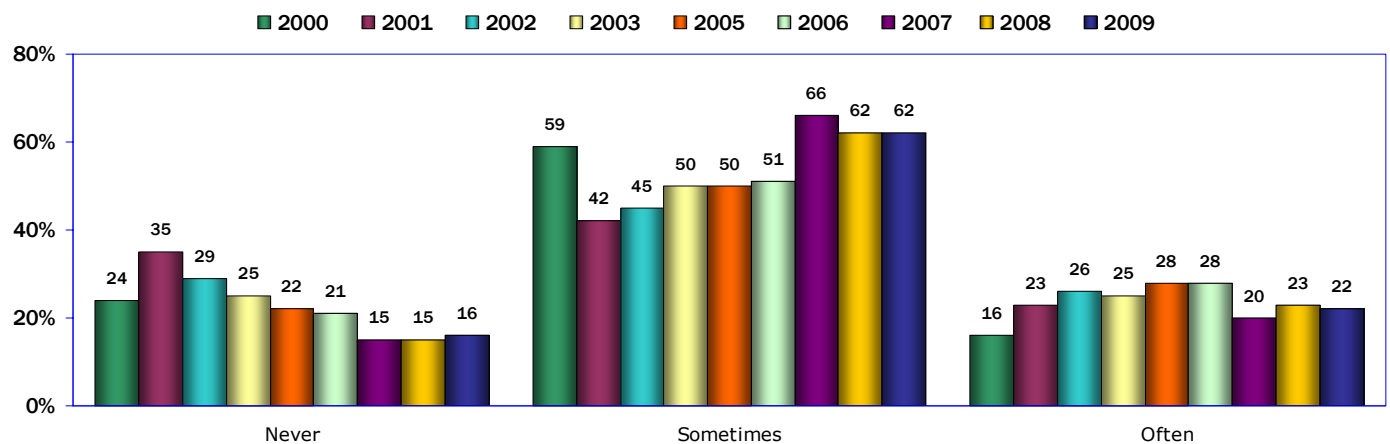
Internet Buyers Who Browse in Stores, then Buy Online



(Q900 M-1 2010)

Eighty-four percent of Internet buyers said they browse online and then buy in stores, marginally lower than the 85 percent reported in 2008.

Internet Buyers Who Browse Online, then Buy in Stores



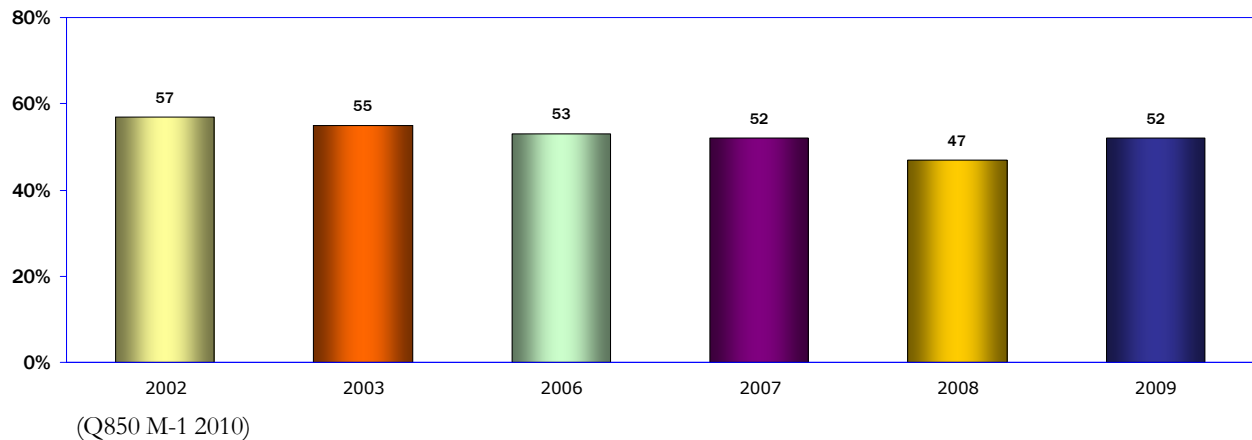
(Q910 M-1 2010)

I02. Views About Risking Privacy by Going Online

The percentage of Internet users who agree that people who go online put their privacy at risk increased in the current study.

Fifty-two percent of users agreed or strongly agreed with the statement, “people who go online put their privacy at risk” – up from 47 percent in 2008 and returning to the same level as reported in 2007.

**People Who Go Online Put Their Privacy at Risk
(Internet Users Who Agree or Strongly Agree)**

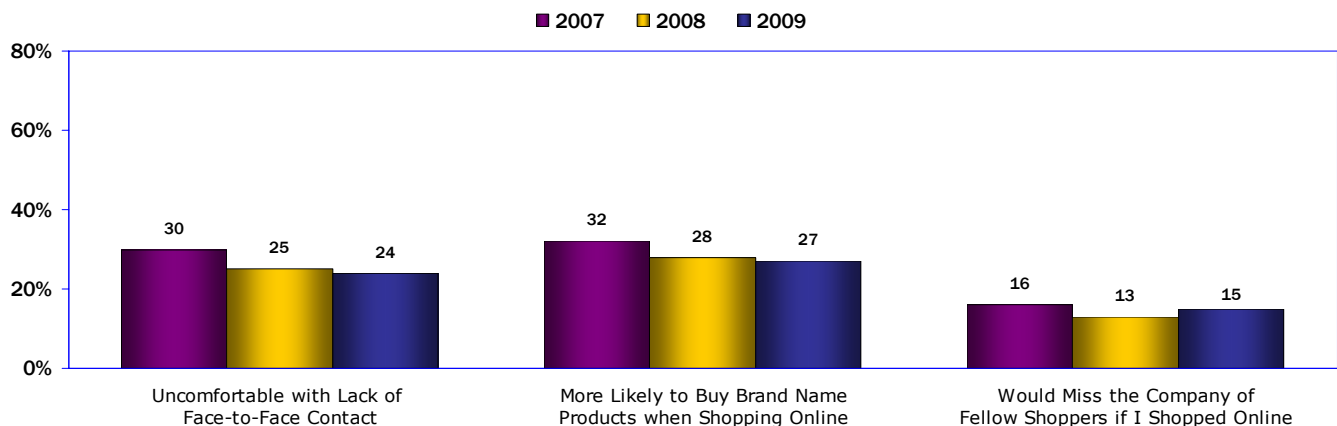


I03. Views about Buying Online and in Local Stores

The percentage of users who are uncomfortable with lack of face-to-face contact when buying online declined for the second year. Also, the percentage of users who said they are more likely to buy brand-name products online than when shopping in stores also declined for the second year.

The percentage of users who agreed or strongly agreed they would miss the company of fellow shoppers if they shopped on the Internet increased slightly in the current study, but is still lower than in 2007.

**Views about Buying Online and in Local Stores
(Internet Users Who Agree or Strongly Agree)**

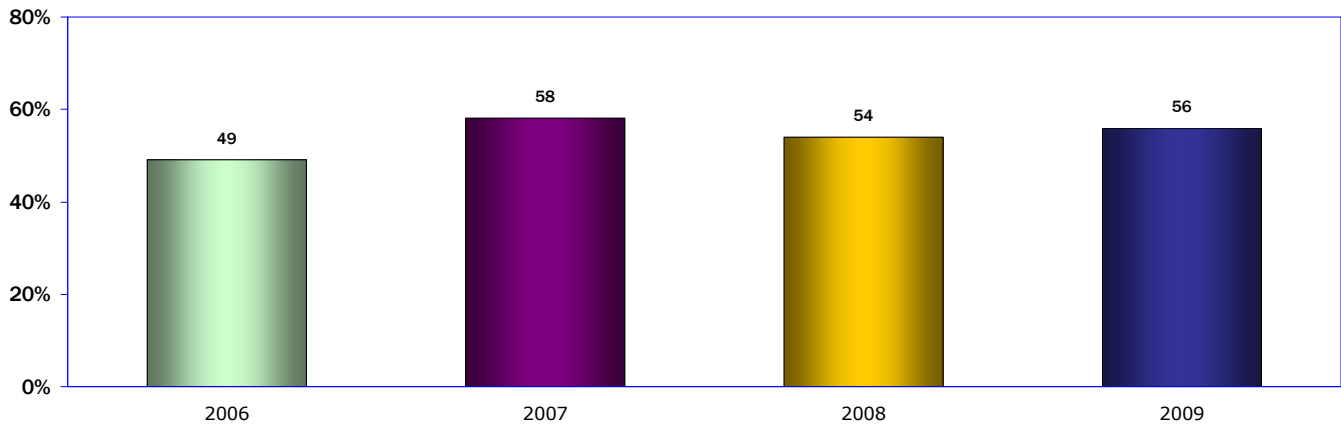


I04. Views about Shopping Online (Product Quality)

A large percentage of Internet users continue to agree that judging the quality of products is more difficult when shopping on the Internet.

When asked about the statement, “it’s difficult to assess product quality or accuracy of product descriptions when shopping on the Internet,” 56 percent of Internet users agreed or strongly agreed, up from 54 percent in 2008 but still below the 58 percent reported in 2007, the peak year for the study thus far.

**It is Difficult to Assess Product Quality or Accuracy of Product Descriptions
when Shopping on the Internet
(Internet Users Who Agree or Strongly Agree)**

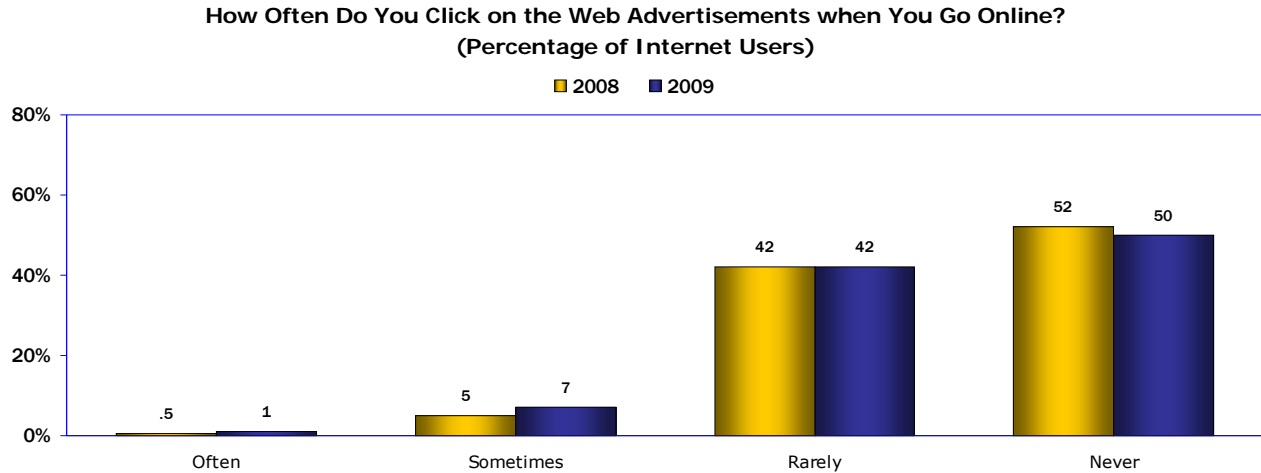


(Q850 M-3 2010)

I05. Do You Click on Web Advertisements?

Internet users continue to express strong negative views about advertising online, but their negative views declined slightly in the current study.

Half of Internet users said they never click on Web advertisements; however, the percentage of users who said they click on Web ads sometimes or often rose slightly in the current study to eight percent, up from 5.5 percent in 2008.

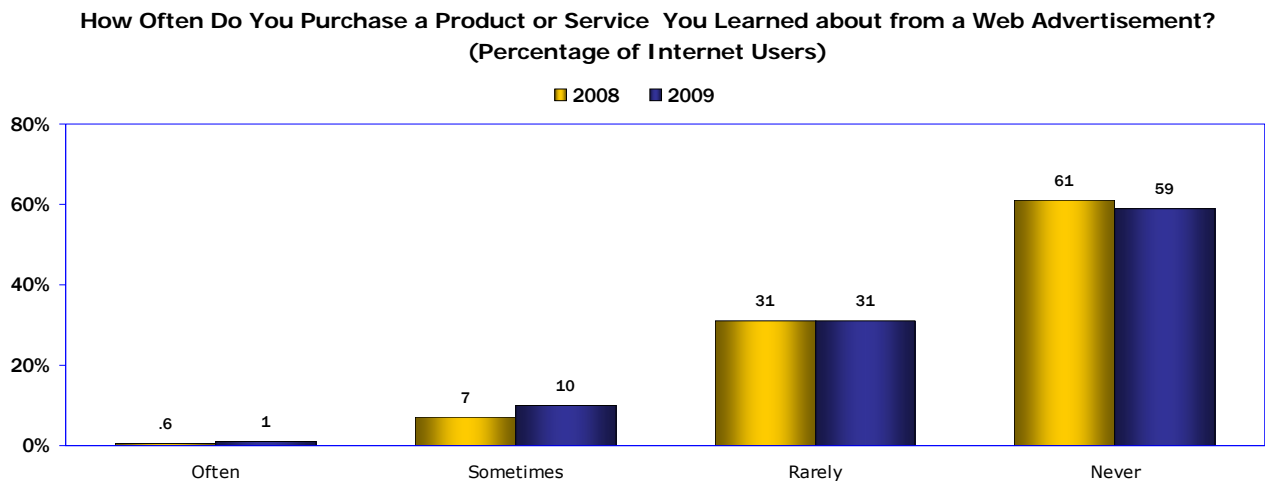


(Q815 J-1 2010)

I06. Web Advertisement and Purchase Decisions

Users continue to be very unenthusiastic about making purchase decisions based on responses to Web advertisements. Fifty-nine percent of Internet users said they never buy products that they learned about from a Web advertisement – down slightly from 61 percent in 2008.

However, the percentage who said they sometimes and often make a purchase based on what they learned from Web advertisements increased slightly to 11 percent, up from 7.6 percent in 2008.



(Q816 JC-1 2010)

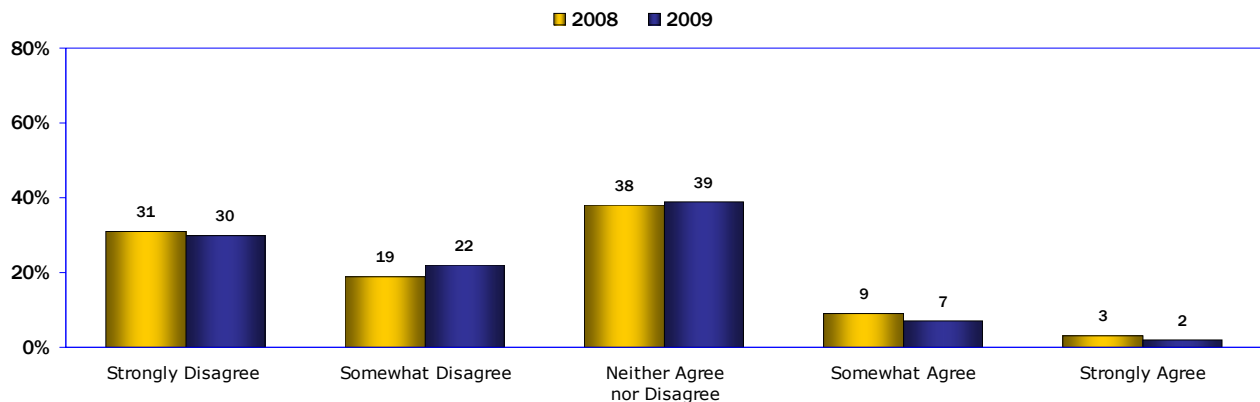
I07. Web Advertising: Information Value

A growing percentage of Internet users said they find Web advertising to be less informative than traditional advertising.

Fifty-two percent of Internet users in the current study disagreed or strongly disagreed with the statement, “I find Web advertising to be more informative than traditional advertising,” up from 50 percent in 2008.

Only nine percent of users agreed with this statement, down from 12 percent in 2008.

**In General, I Find Web Advertising To Be More Informative than Traditional Advertising
(Percentage of Internet Users)**

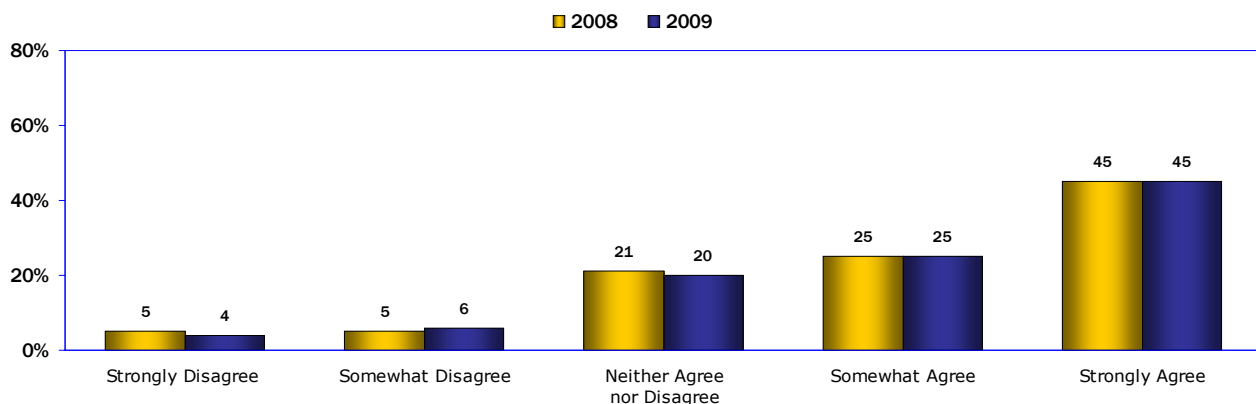


(Q817 J-1 2010)

I08. Do You Find Web Advertising Annoying?

Given the responses to the three previous questions, not surprisingly 70 percent of users agreed or strongly agreed with the statement, “I find Web advertising annoying,” the same level as in 2008.

**In General, I Find Web Advertising Annoying
(Percentage of Internet Users)**



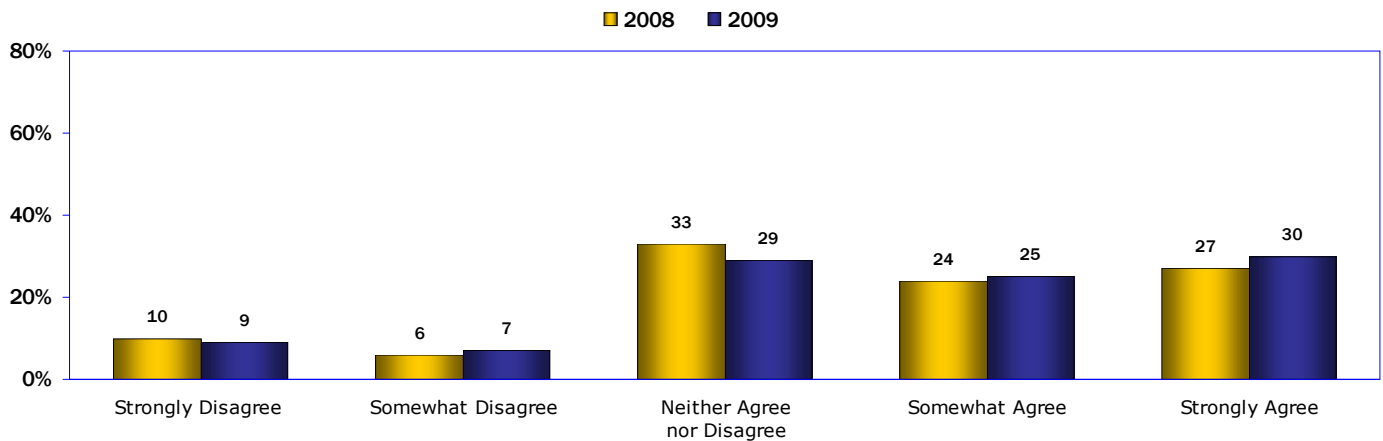
(Q817b J-2 2010)

109. Online Advertising vs. Paying for Internet Content

Even though users express strong negative views about online advertising, a growing percentage nevertheless prefers Web ads to support Internet pages rather than personally paying for content.

Fifty-five percent of users agreed or strongly agreed that they prefer having free access to online content that has advertising accompanying it, rather than having to pay for the content -- an increase from 51 percent in 2008.

**I Prefer Having Free Access to Online Content that has Advertising Accompanying it
Rather than Having to Pay for the Content
(Percentage of Internet Users)**



(Q817c J-3 2010)

Communication Patterns

Internet users with e-mail **96%**

Users who said the Internet is important or very important for maintaining social relationships **52%**

Users who said instant messaging is important or very important for maintaining social relationships **23%**

Average number of friends met online but not met in person **5.3**

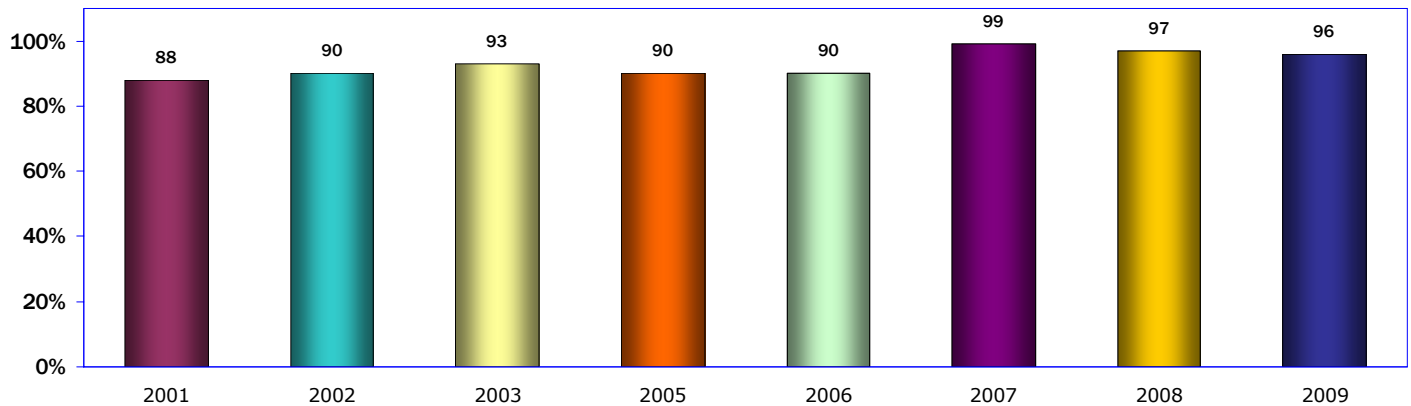
Average number of friends met in person whom they originally met online **2.5**

Internet users who said that going online helped users understand the economic crisis **44%**

III. How Many Americans Are Using E-mail?

Almost all respondents who go online use e-mail (96 percent), but the percentage of Internet users who use e-mail has declined slightly for the second year in a row.

**E-mail Use
(Percentage of Internet Users)**

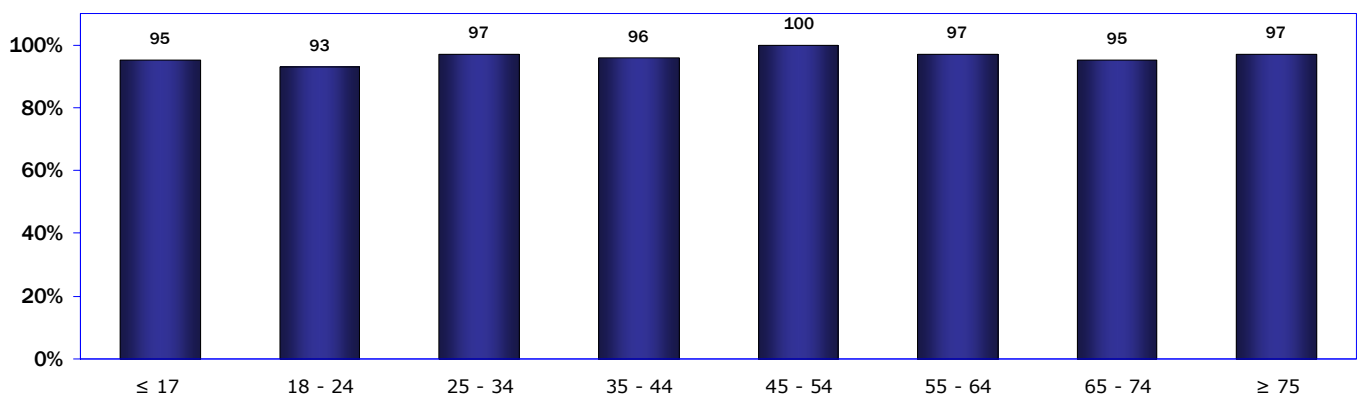


(Q220 JC-1 2010)

III. E-mail Users: By Age

Very large percentages of Internet users in every age range use e-mail. The percentage is slightly lower among users age 18-24 – probably because of the growing use of telephone text messaging for e-communication.

**E-mail Use
(Percentage of Internet Users: by Age)**



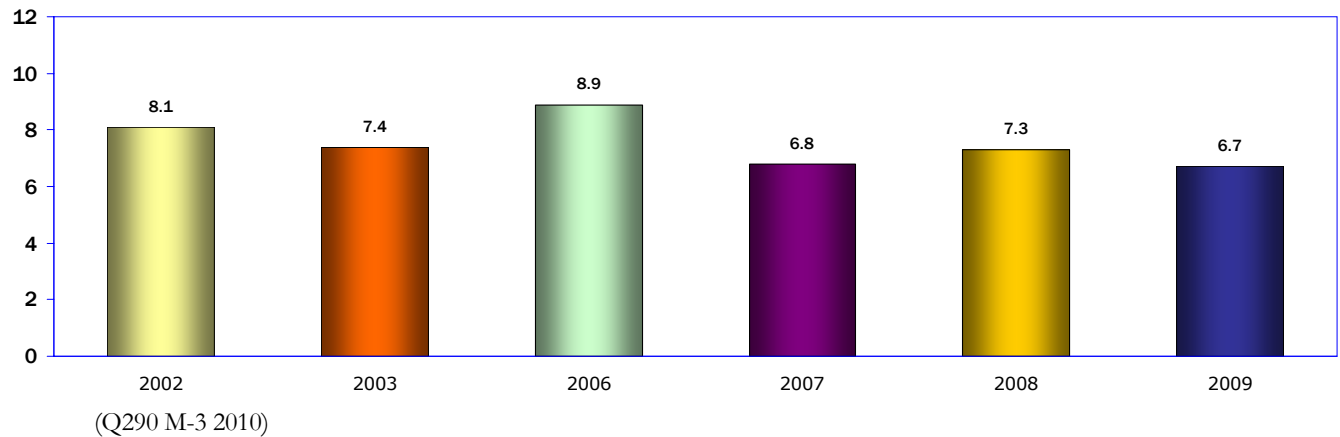
(Q220 JC-2 2010)

I 12. Regular contact by e-mail

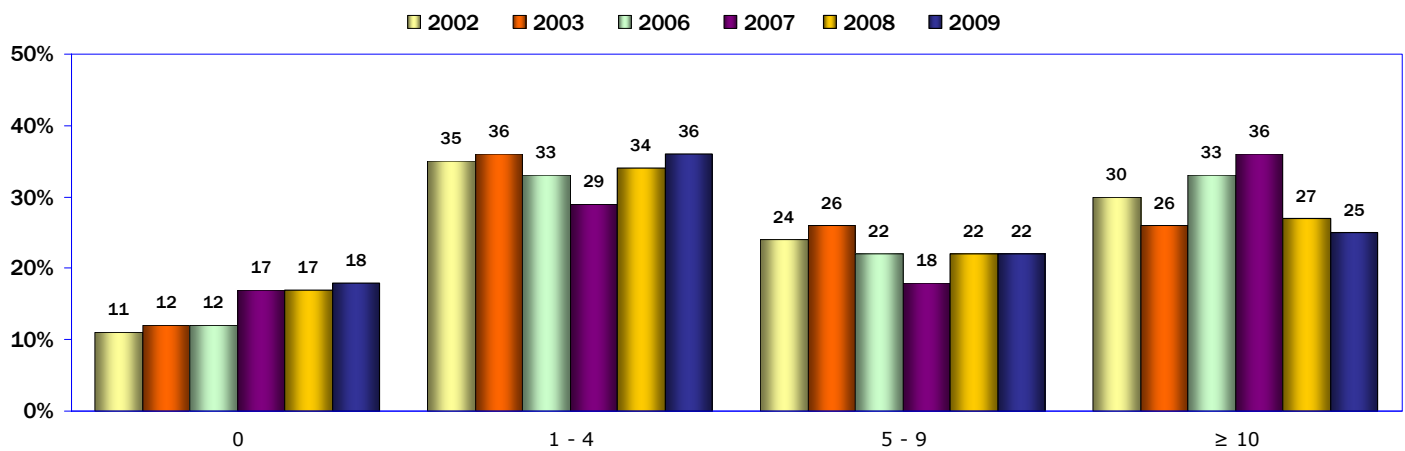
E-mail users maintain weekly personal e-mail contact with an average of 6.7 people in the current study, slightly lower than the 7.3 people reported in 2008 and down from the peak of 8.9 in 2006.

Forty-seven percent of e-mail users maintain personal contact by e-mail on a weekly basis with five or more people (see the lower chart), down from 49 percent in 2008 and 54 percent (the peak thus far) in 2006.

How Many People do you Maintain Regular Personal E-mail Contact with on a Weekly Basis?



How Many People do you Maintain Regular Personal E-mail Contact with on a Weekly Basis?

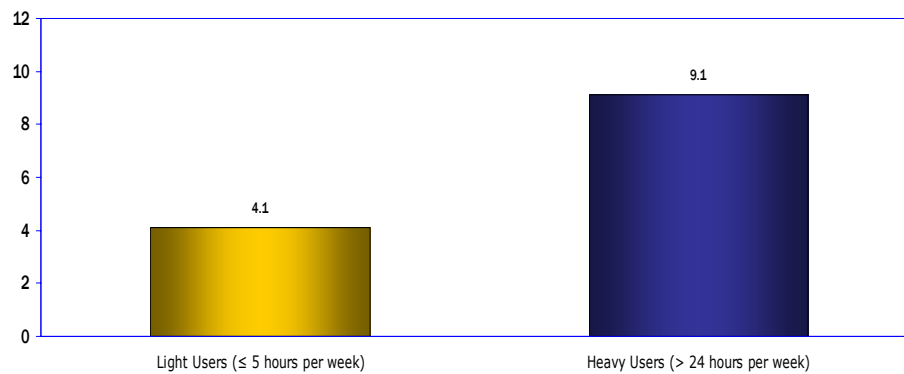


(Q290 M-5 2010)

I 13. Regular Contact by E-mail: Light Users vs. Heavy Users

Heavy Internet users report more than twice as many people with whom they stay in personal e-mail contact on a weekly basis, compared to light users.

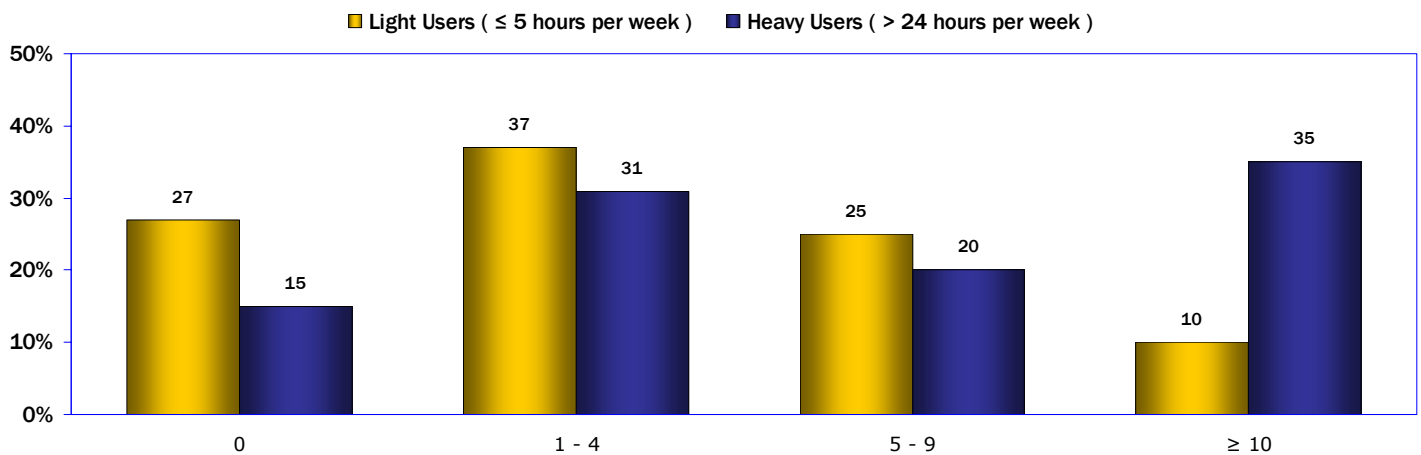
How Many People do you Maintain Regular Personal E-mail Contact with on a Weekly Basis?



(Q290 M-4 2010)

Fifty-five percent of heavy users report that they maintain weekly personal contact with five or more people by e-mail, compared to 35 percent of light users.

How Many People do you Maintain Regular Personal E-mail Contact with on a Weekly Basis?
(Percentage of E-mail Users: Light Users vs. Heavy Users)



(Q290 M-2 2010)

I 14. How Quickly Should Users Reply To Personal E-mail?

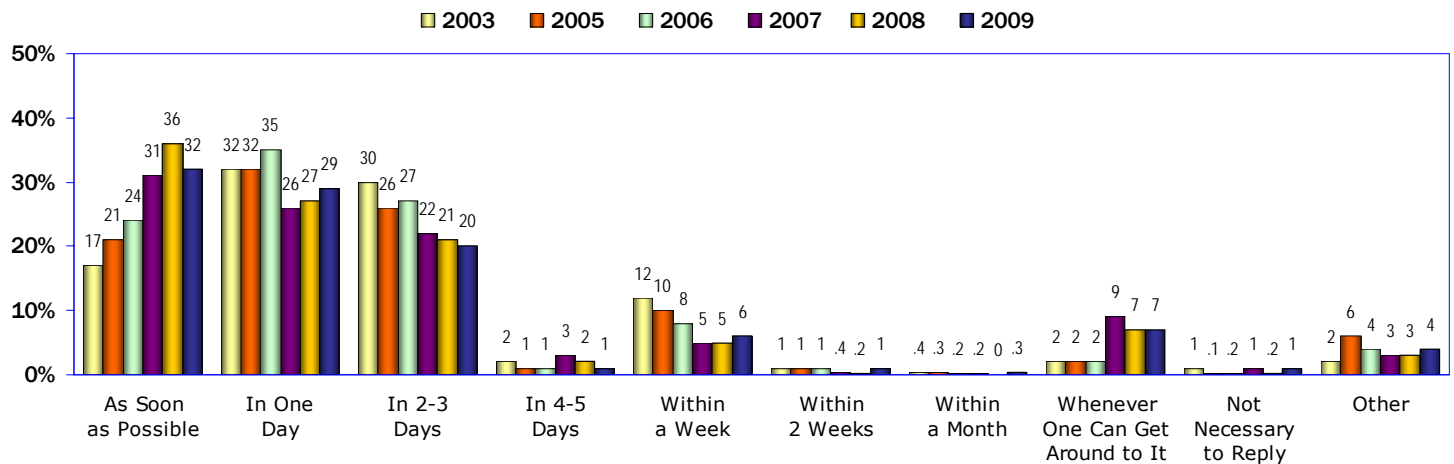
Although a slightly smaller percentage of e-mail users in the current study said they expect a quick response to their online communications, expectations about fast response to e-mails remain high.

Thirty-two percent of e-mail users said they expect a response to a personal e-mail message “as soon as possible” – down from the 36 percent reported in 2008 (the peak thus far in the study). However, 29 percent of e-mail users in the current study said that e-mail response should be in one day – an increase for the second year in a row.

In total, sixty-one percent of e-mail users said they expect a response in one day or as soon as possible – down slightly from 63 percent in 2008.

The percentage of e-mail users who said their online correspondence should receive a reply in a longer period of time (two or three days, four or five days, or within a week) declined to 27 percent of users – another new low for the third year in a row in the Digital Future Studies.

How Quickly Should Users Reply to a Personal E-mail Message?
(Percentage of E-mail Users)



(Q263 M-3 2010)

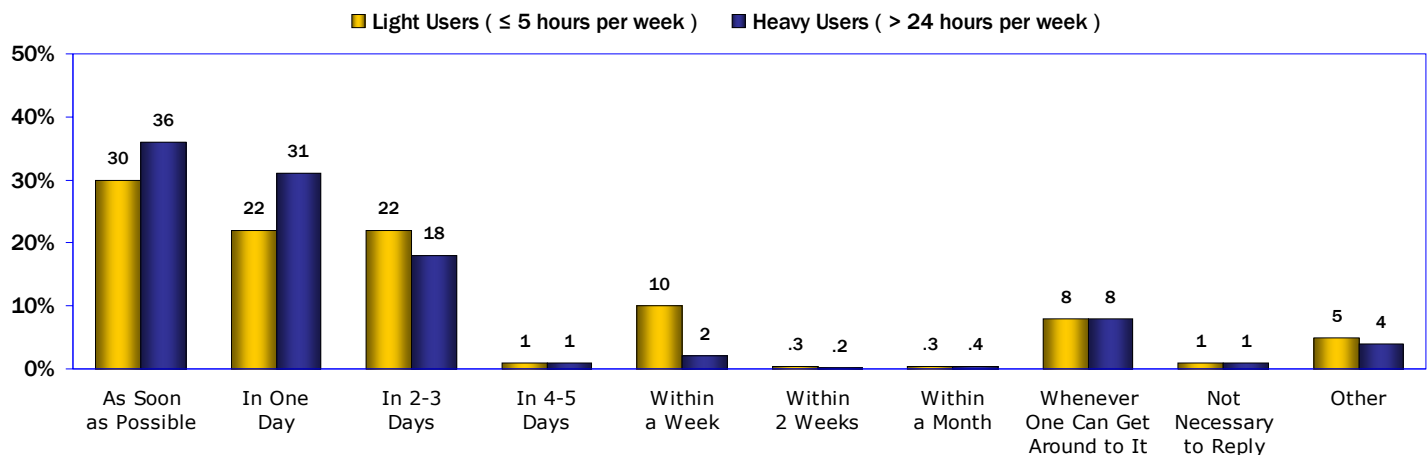
I 15. How Quickly Should Users Reply To Personal E-mail? (Light Users Vs. Heavy Users)

Heavy Internet users and light users alike expect a fast response to their personal e-mail correspondence.

Sixty-seven percent of heavy users said e-mail should receive a reply in one day or as soon as possible, compared to 52 percent of light users.

Nevertheless, notable percentages of both light users and heavy users do not feel that e-mail requires a rapid response; 30 percent of heavy users and 42 percent of light users said that an e-mail reply can be sent in two days or more, or “whenever one can get around to it.”

How Quickly Should Users Reply to a Personal E-mail Message?
(Percentage of E-mail Users: Light Users Vs. Heavy Users)



(Q263 M-2 2010)

116. E-mail Communication with Teachers, Government Officials, And Health Care Professionals

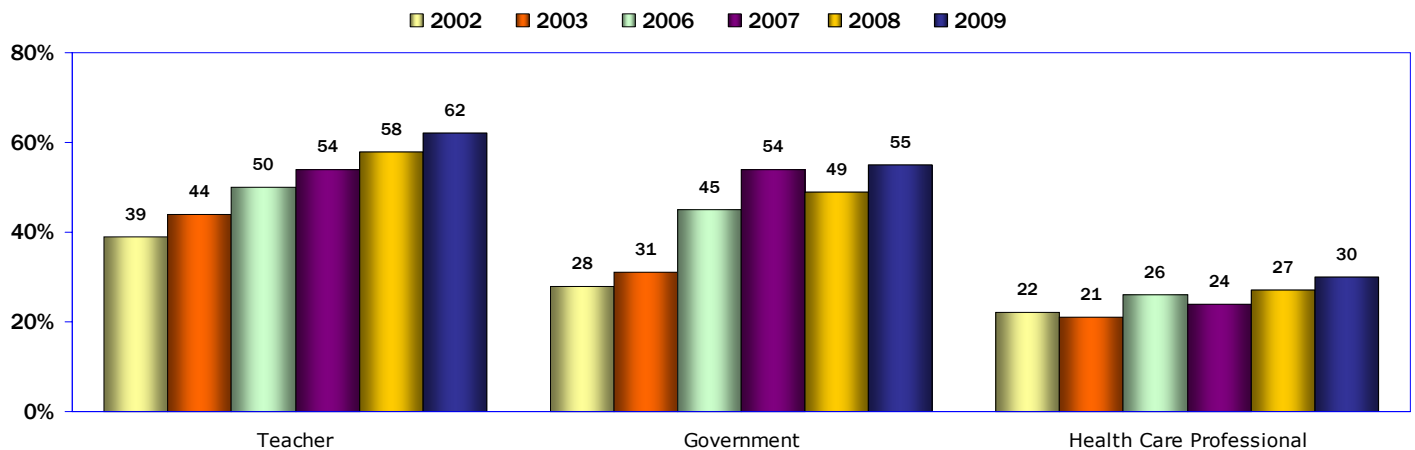
Growing percentages of e-mail users are going online to communicate with teachers, government officials, and health care professionals.

For the sixth year in a row, an increasing percentage of e-mail users said they communicated by e-mail with teachers.

More than half of e-mail users (55 percent) in the current Digital Future study said they contacted a government official by e-mail – up from 49 percent in 2008.

The percentage of users who contact a health care provider by e-mail, although still lower than those who contact a teacher or government official, increased for the second year, and has reached its highest level in the Digital Future studies.

**E-Mail Contact with Teachers, Government Officials, or Health Care Providers
(Percentage of E-mail Users)**



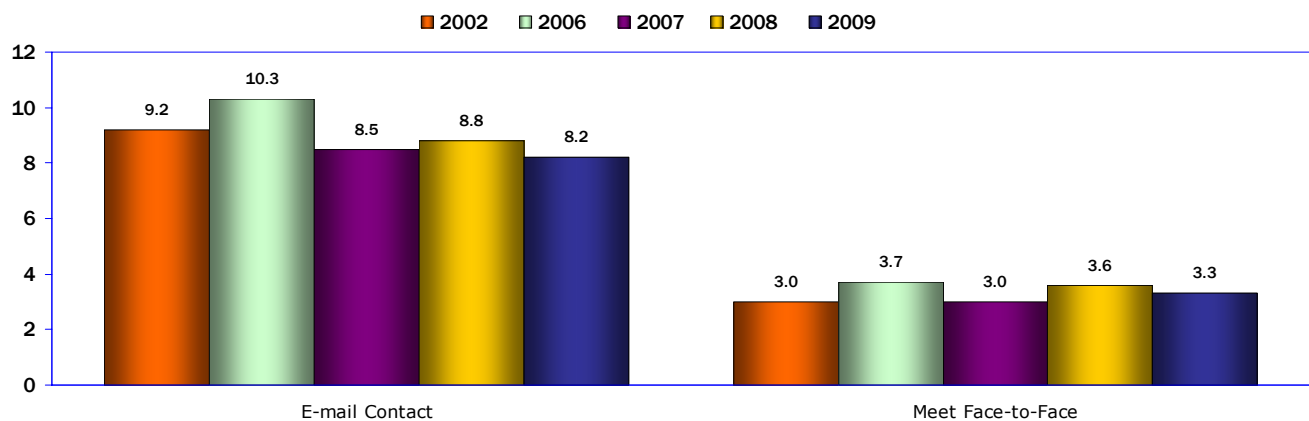
(Q267 M-3 2010)

117. E-mail Contacts Met Face-to-Face

E-mail users report an average of 8.2 people they contact weekly, down slightly from 8.8 in 2008.

Users also report that of those with whom they maintain regular e-mail contact, they meet an average of 3.3 people face-to-face on a weekly basis, down slightly from 3.6 in 2008.

**Average Number of People Contacted by E-mail;
Average Number of People Contacted Regularly by E-Mail Who are Also Met Weekly Face-to-Face
(E-mail Users)**

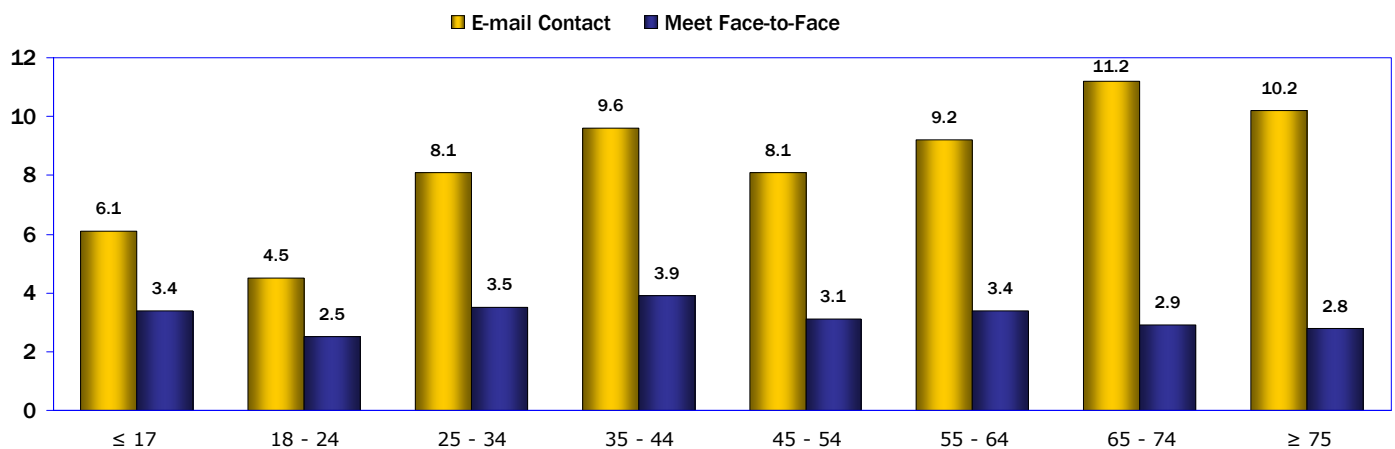


(Q290x291 M-1 2010)

Looking at e-mail contacts by age group, the two oldest age groups of e-mail users report the highest average number of weekly e-mail contacts: 11.2 for users age 65-74, and 10.2 for those 75 and older.

E-mail users age 35-44 report the largest number of regular e-mail contacts with whom they meet face-to-face on a weekly basis (3.9).

**Average Number of People Contacted Regularly by E-Mail Who are Also Met Weekly Face-to-Face
(E-mail Users by Age)**

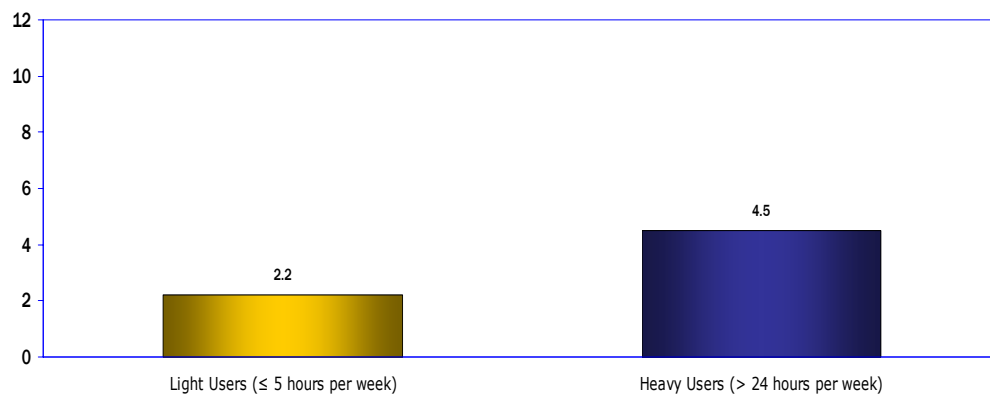


(Q290x291 M-2 2010)

I 18. E-mail Contacts Met Face-to-Face: Light Users vs. Heavy Users

Compared to light users, heavy Internet users report twice as many e-mail contacts who they meet with face-to-face on a weekly basis.

**How Many of Those You Maintain Regular E-mail Contact
With Do You Meet With Face-to-Face on a Weekly Basis?
(Average Reported by Light Users Vs. Heavy Users)**



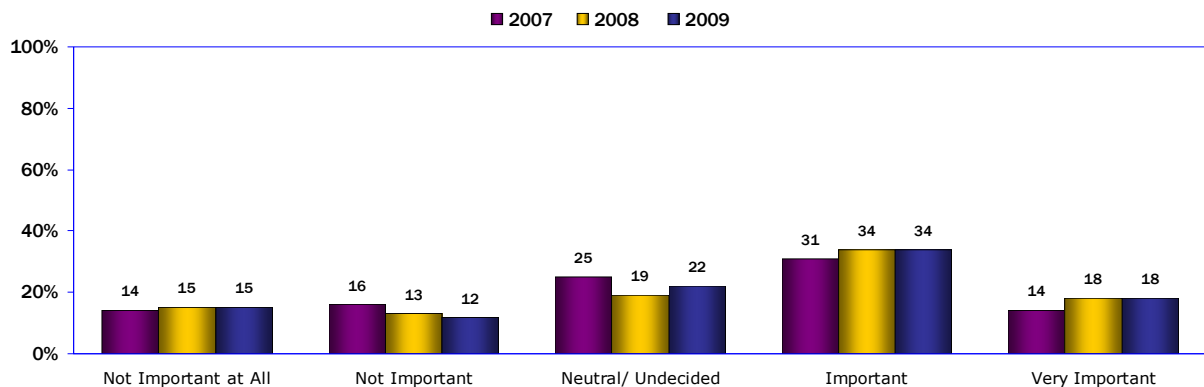
(Q291 M-2 2010)

I 19. The Internet and Social Relationships

The percentage of Internet users who said that going online is important in helping to maintain social relationships remained constant in the current Digital Future Study. Fifty-two percent of users said the Internet was important or very important in helping them maintain their social relationships – the same as in 2008 and up from 45 percent in 2007.

Twenty-seven percent of users said the Internet has no importance in maintaining their social relationships -- down marginally from 28 percent in 2008 and 30 percent in 2007.

**How Important is the Internet for Helping You Maintain Social Relationships
(Percentage of Internet Users)**



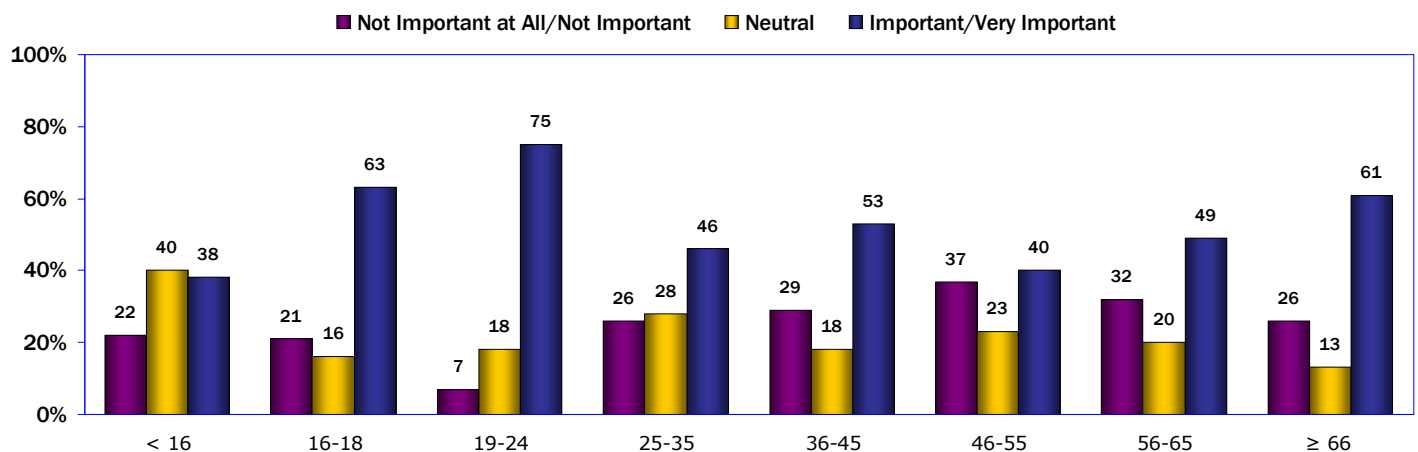
(Q218A JC-1A 2010)

I20. The Internet and Social Relationships: by Age

Exploring this question by age shows that the percentage of those who consider the Internet important or very important for social relationships is highest among users age 24 and under, with three-quarters of users age 19-24 and 63 percent of users age 16-18 expressing this view. Forty percent or more of users in all age groups except those 16 or under said that the Internet is important or very important for social relationships.

Of special note is the 61 percent of users age 66 and older who said the Internet is important or very important for maintaining social relationships.

**How Important is the Internet for Helping You Maintain Social Relationships
(Percentage of Internet Users)**



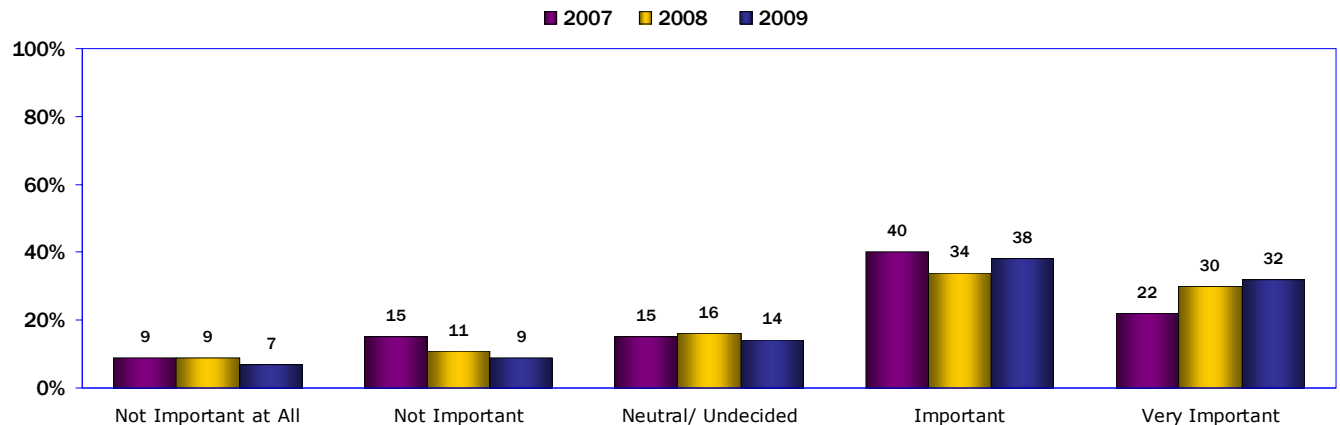
(Q218A JC-1B 2010)

121. Cell Phones and Social Relationships

More than 70 percent of cell phones users said their phone helped them to maintain their social relationships, an increase from 64 percent in 2008.

The percentage of cell phone who said their phone is not important for maintaining social relationships declined to 16 percent, down for the second year in a row from 20 percent in 2008 and 24 percent in 2007.

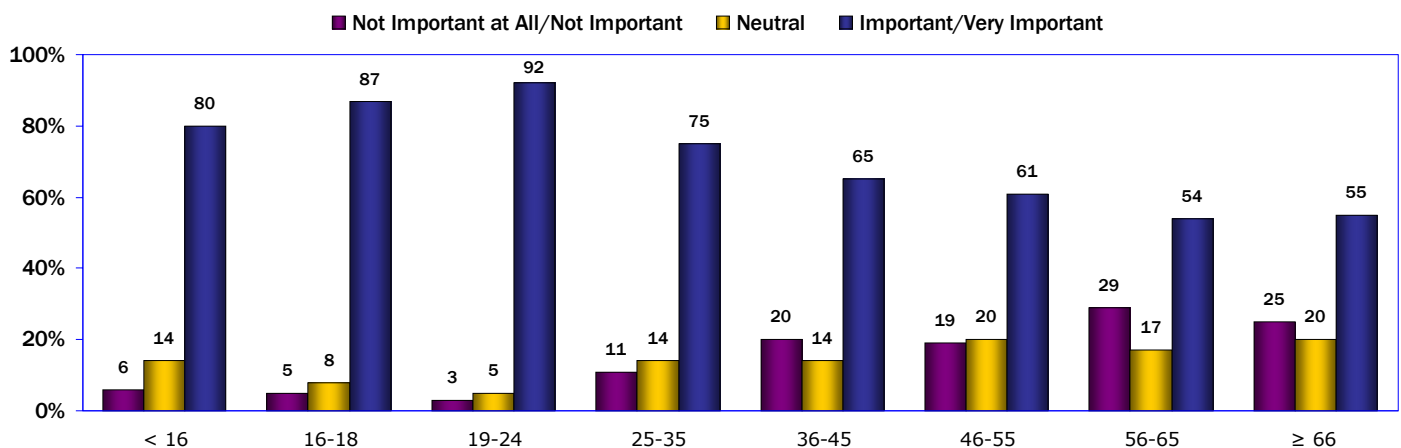
**How Important Is the Cell Phone for Helping You Maintain Social Relationships?
(Percentage of Cell Phone Users)**



(Q218B JC-2A 2010)

More than half of cell phone users in all of the age ranges in the Digital Future Project said their cell phone is important or very important in maintaining social relationships. The highest percentages were reported by cell phone users age 24 and under; in the 19-24 age group, nearly all cell phone users (92 percent) said that their cell phone was important to maintaining social relationships.

**How Important is the Cell Phone for Helping You Maintain Social Relationships?
(Cell Phone Users)**



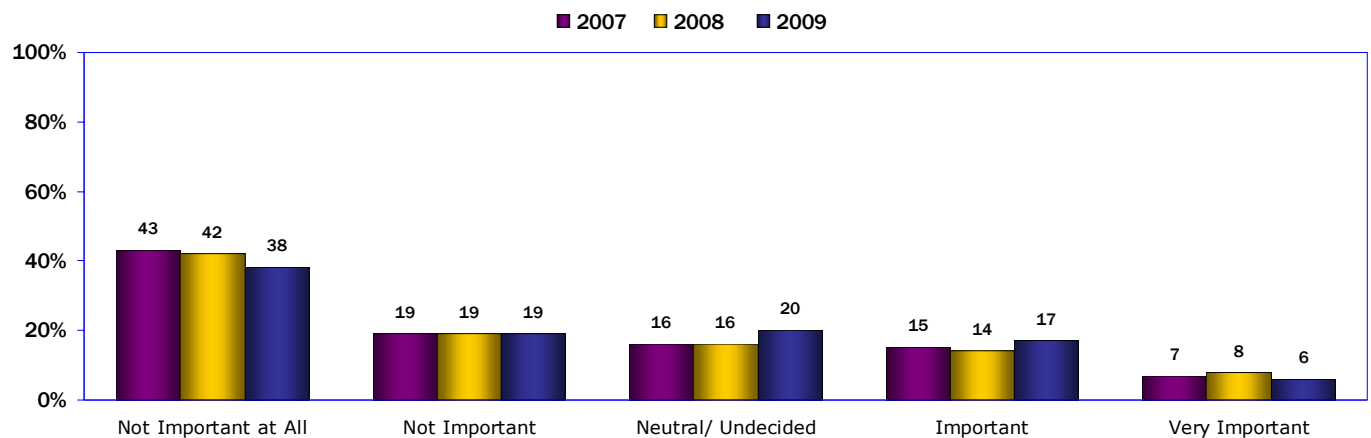
(Q218B JC-1B 2010)

I22. Instant Messaging and Social Relationships

Instant messaging remains one of the most frequently-used communication tools for some age groups, but looking at all respondents shows that overall, relatively small percentages of Internet users said that instant messaging is important in maintaining social relationships.

Among all Internet users, 23 percent said that instant messaging is important or very important for maintaining social relationships – up marginally over the 22 percent reported in 2008 and 2007. And the percentage of those expressing negative views is declining; 57 percent of users in the current study said instant messaging is not important for maintaining social relationship – down from 61 percent in 2008 and 62 percent in 2007.

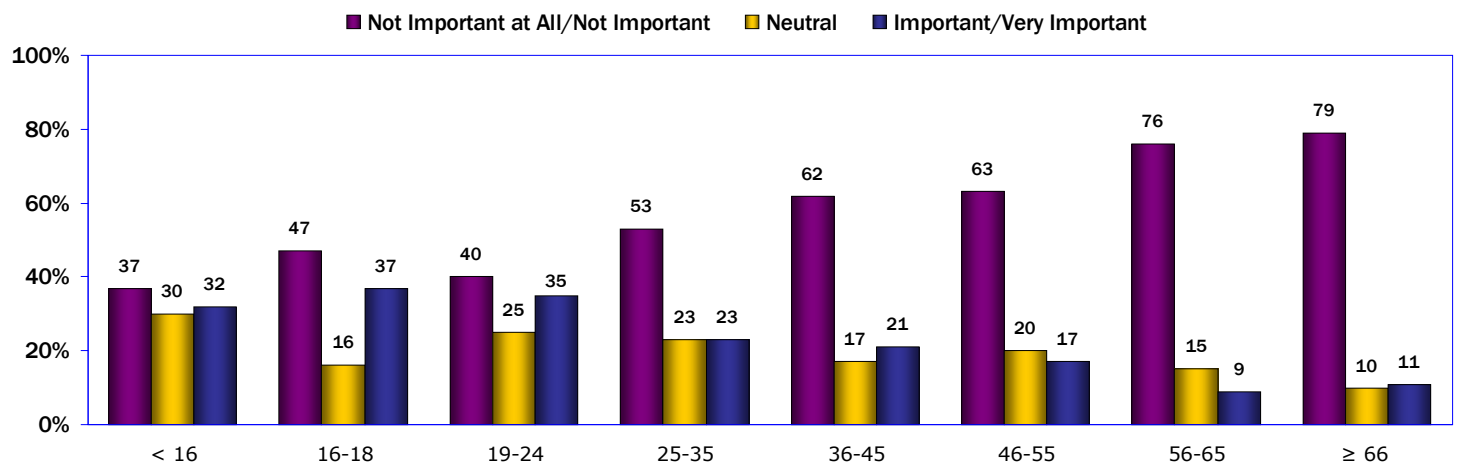
**How Important is Instant Messaging for Helping You Maintain Social Relationships?
(Percentage of Internet Users)**



(Q218C JC-3A 2010)

The percentages of Internet users with positive views about instant messaging for maintaining social relationships are low in most age groups. More than half of all users age 25 and older said that IM is not important for maintaining social relationships. Among users age 24 and under, the largest percentage who said that instant messaging was important for maintaining social relationships was the 16-18 age group (37 percent).

**How Important Is Instant Messaging For Helping You Maintain Social Relationships?
(Internet Users)**



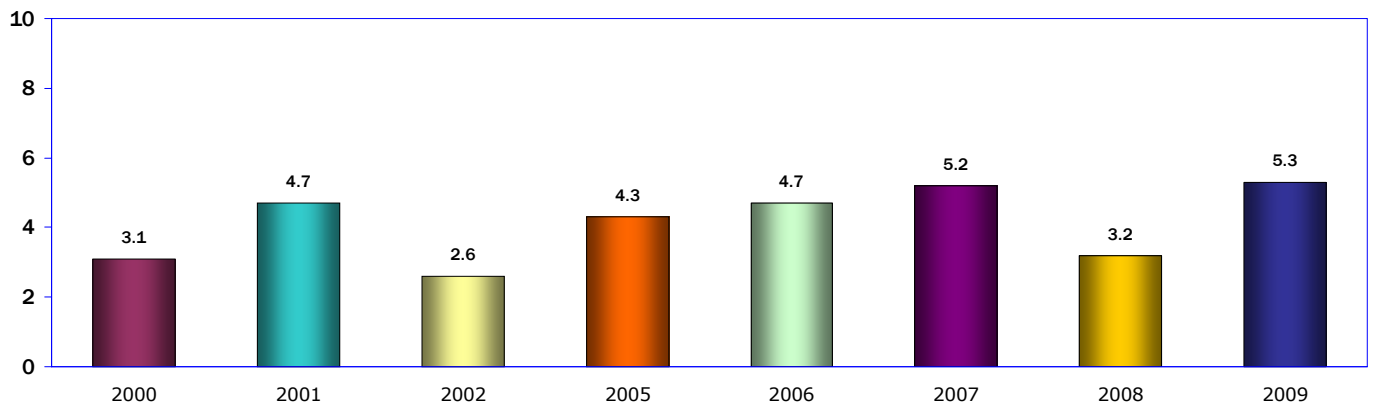
(Q218C.JC-3B 2010)

I23. The Internet and Online Friends

Internet users report an increase in the number of online friends, an average that in the current Digital Future Study has reached a peak thus far in the project.

Internet users report an average of 5.3 friends online whom they have never met in person, a large increase over the 3.2 online friends reported in 2008 and the previous peak of 5.2 friends in 2007.

Online Friends Never Met in Person



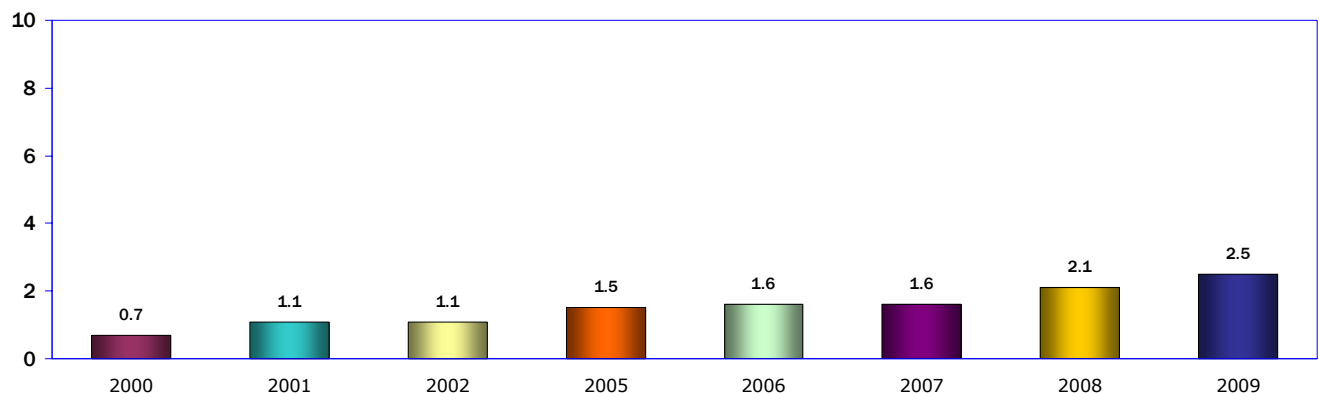
(Q330 JC-1 2010)

I24. Friends Met Online, Then Met In Person

While the number of online friends is increasing, so is the number of friends that users meet in person after initially meeting them online.

Users said they met an average of 2.5 friends in person whom they originally met online -- an increase for the third year in a row and a new high average for the Digital Future Project.

Online Friends Met in Person



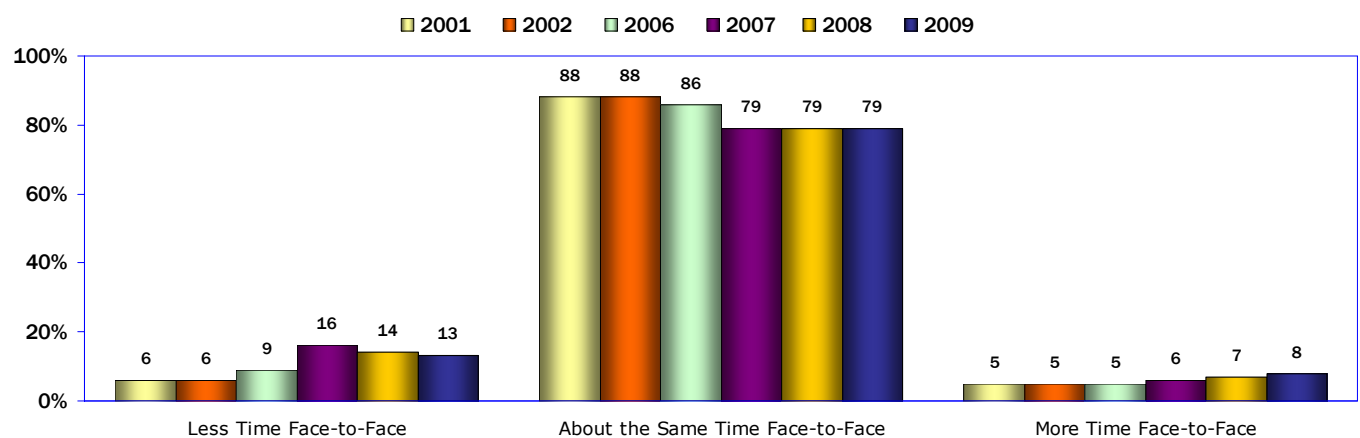
(Q320 JC-1 2010)

I25. Time Spent Socializing with Friends and Family

The percentage of Internet users in the current study who said that they spend about the same amount of face-to-face time with friends since being connected to the Internet remained stable for the third year in a row (79 percent).

The percentage of users who said they spend less face-to-face time with friends since being connected to the Internet decreased for the second year in a row – now 13 percent of users.

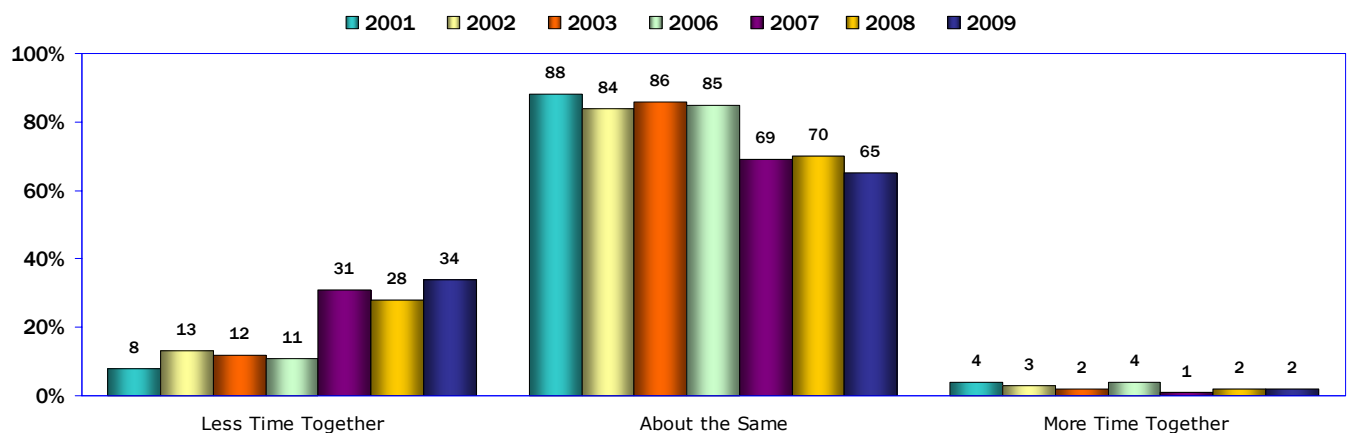
**Time Spent Face-to-Face with Friends since Being Connected to the Internet
(Percentage of Internet Users)**



(Q1037 JC-2 2010)

Very few users (two percent) said they spend more face-to-face time with family since being connected to the Internet. The percentage who said they spend less face-to-face time with family since going online increased to 34 percent of users, now reaching the highest level in the Digital Future Project.

**Time Spent Face-To-Face with Family in the Household Since Being Connected to the Internet
(Percentage of Internet Users)**

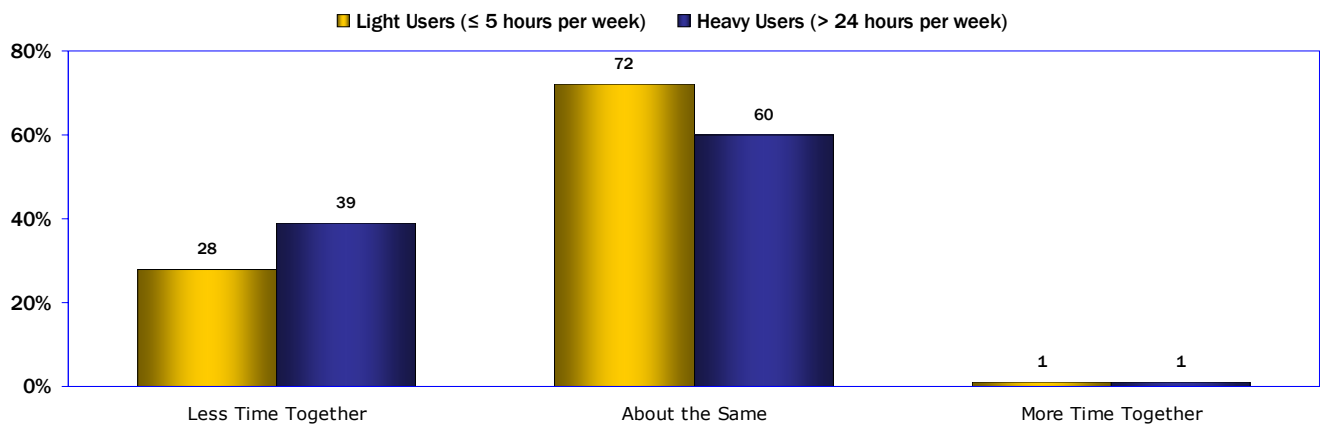


(Q1035 74A M-3 2010)

I26. Time Spent Socializing with Family and Friends: Light Users vs. Heavy Users

Compared to light home Internet users, larger percentages of heavy Internet users said the members of their household spend less time together since being connected to the Internet (39 percent compared to 28 percent).

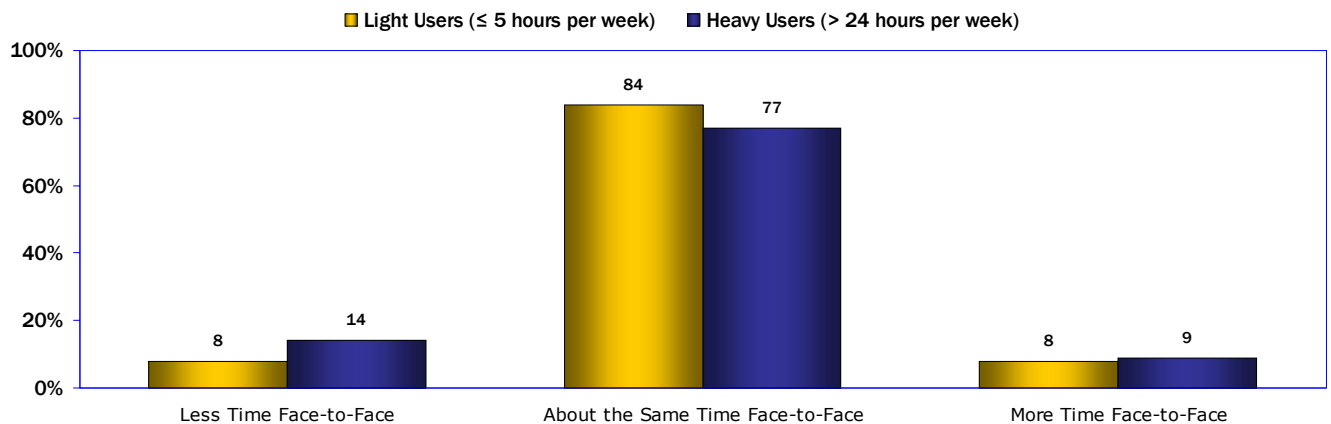
**Time Spent Face-To-Face with Family in the Household since Being Connected to the Internet
(Percentage of Home Internet Users: Light Users vs. Heavy Users)**



(Q1035 M-2 2010)

Large percentages of light home users (92 percent) and heavy home users (86 percent) said that their time spent face-to-face with friends is about the same or has increased since they were connected to the Internet.

**Time Spent Face-To-Face With Friends Since Being Connected to the Internet
(Percentage of Internet Users: Light Users vs. Heavy Users)**



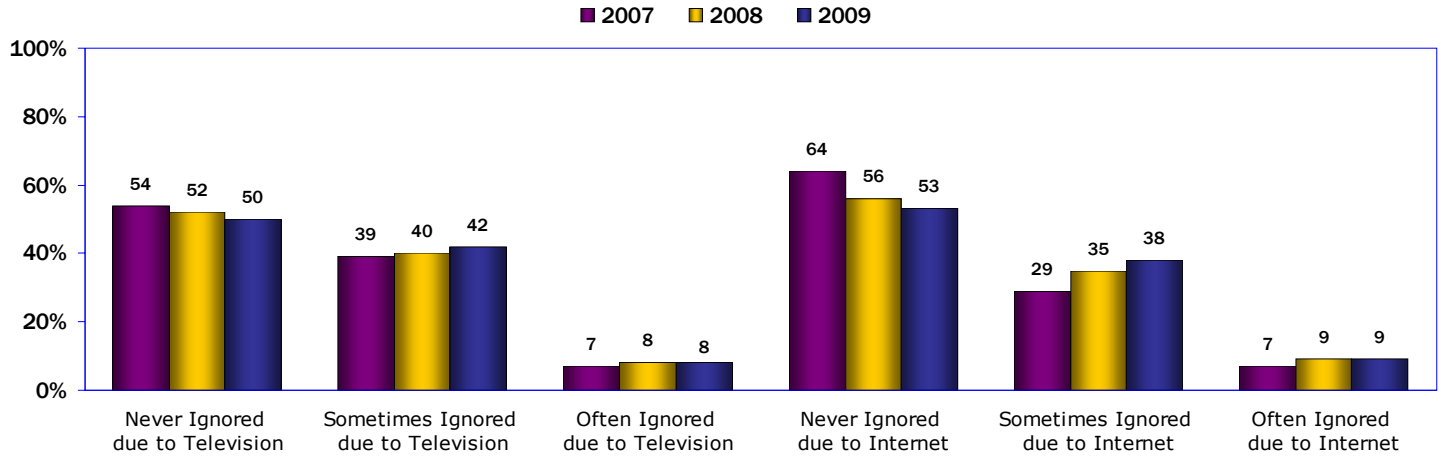
(Q1037 JC-2 2010)

127. Are You Ignored because of Television or the Internet?

Forty-seven percent of Internet users said they were sometimes or often ignored because another member of the household spends too much time online.

An even higher percentage (50 percent) said they were ignored because others spend too much time watching TV.

**Do You Feel that You are Ignored because a Household Member Spends Too Much Time Watching TV?
Do You Feel that You are Ignored because a Household Member Spends Too Much Time on the Internet?**
(Percentage of Internet Users with Multiple People in the Household)



(Q1010 x Q1020 2010)

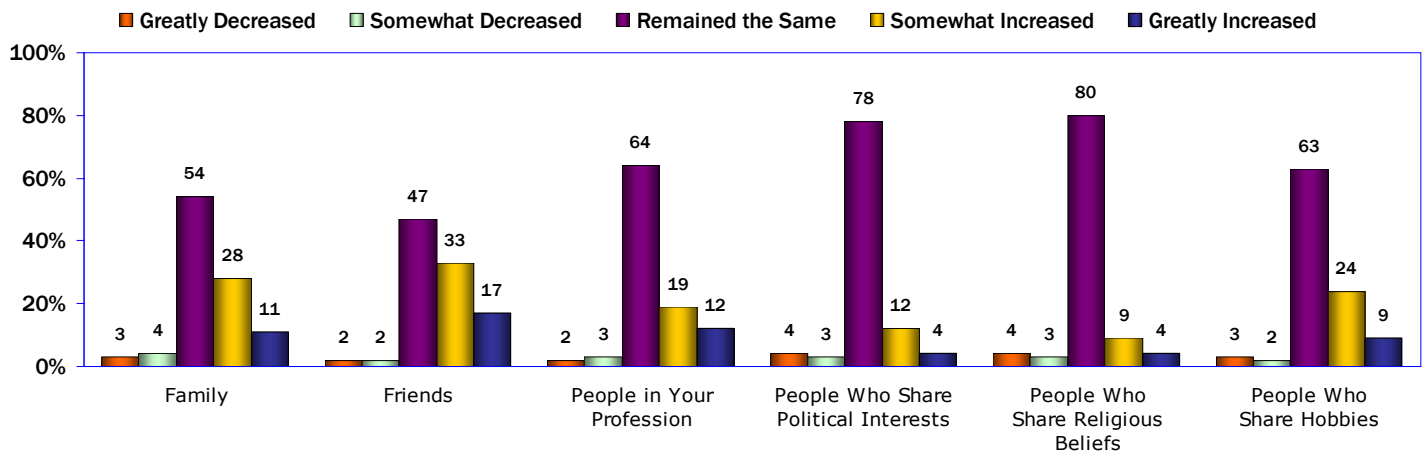
I28. Internet Use and Contact with Others

Even though users report some negative issues involving the Internet and time spent socializing in the family (*see page 141*), they also report that Internet use has almost no effect or a positive effect on contact with the key groups in the lives of users, including family, friends, and people who share hobbies, political beliefs, religious beliefs, and professional interests.

Internet use has increased or greatly increased contact for users with their friends (50 percent), and families (39 percent), as well as people who share their hobbies (33 percent), professions (31 percent), political interests (16 percent), and religious beliefs (13 percent).

However, small percentages of users ranging from four to seven percent said that the Internet has decreased or greatly decreased their contact with key groups in their lives.

**How Has Internet Use Affected Your Contact with the Following Groups?
(Percentage of Internet Users)**



(Q950 JC-1 2010)

The Recession: Internet Use during the Economic Crisis

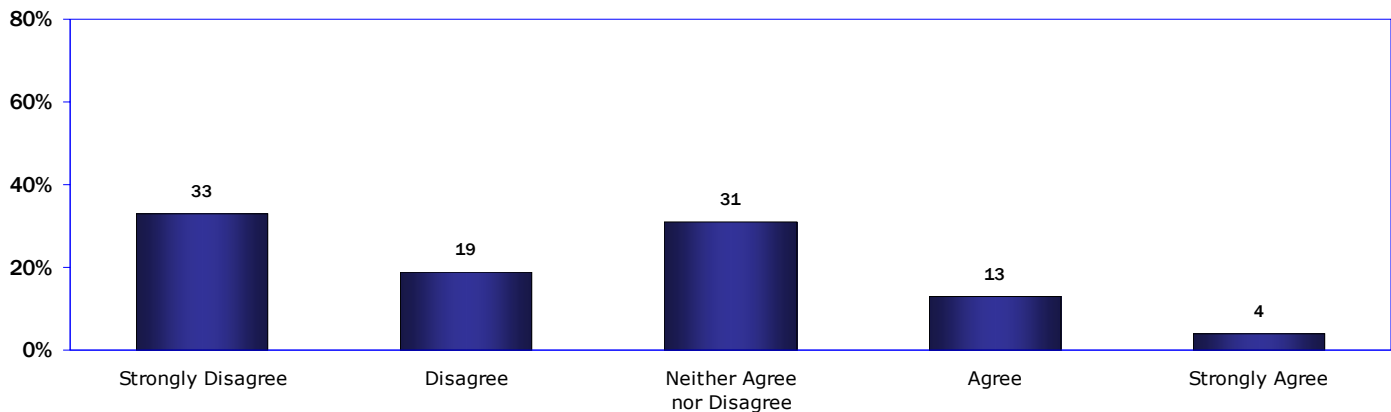
The current Digital Future Project asked five new questions that explored Internet users' views and behavior about going online during the economic recession.

In general, low percentages of users went online to communicate about the recession or to cope with tough economic times. However, a moderate percentage said that the Internet was helpful to them during the economic crisis.

I29. Going Online to Cope with the Recession

Internet users were asked if they dealt with the economic downturn by spending more time online. Only a small percentage of users agreed or strongly agreed with this statement (17 percent), while more than half (52 percent) disagreed or strongly disagreed.

To Deal with the Present Tough Times I Find Myself Spending More Time Online
(Percentage of Internet Users)

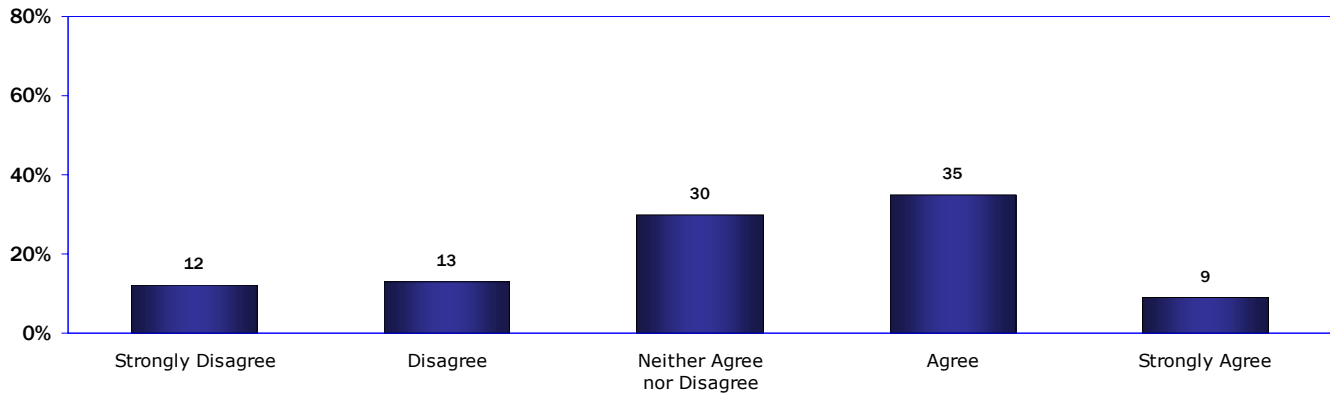


(Q533 M-9 2010)

I30. Does Information Online Help Users Better Understand the Economic Crisis?

Almost half (44 percent) of Internet users said that information online helps them better understand the economic crisis. However, this level of agreement was the highest reported for any of the five new questions.

**Information Online Helps Me Better Understand the Current Economic Crisis
(Percentage of Internet Users)**

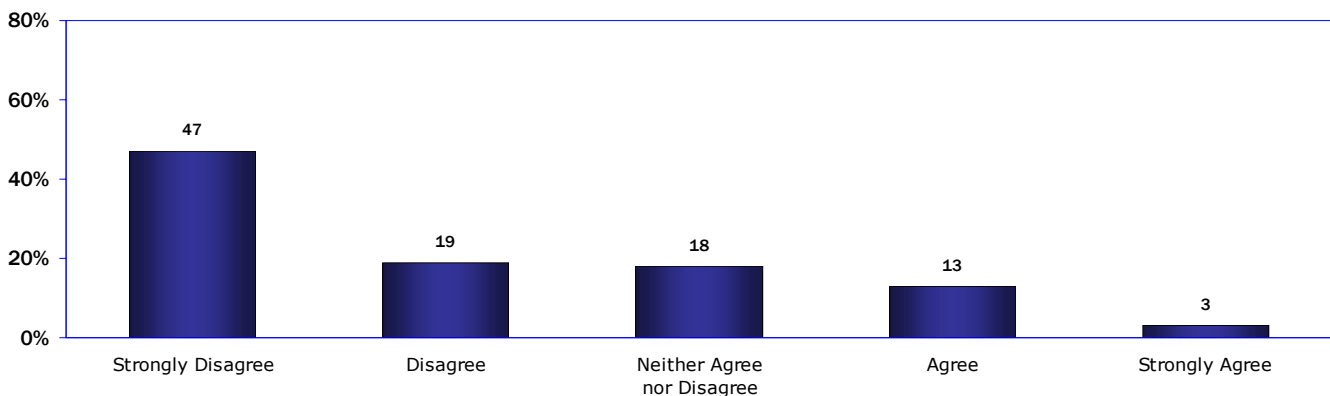


(Q533 M-10 2010)

I31. Do Internet Users Share Their Thoughts and Feelings About the Recession with Others Online?

Although 16 percent of Internet users share their thoughts and feelings about the current economic crisis online with others, almost two-thirds of users (66 percent) do not.

**I Frequently Share My Thoughts and Feelings
about the Current Tough Times with Others Online
(Percentage of Internet Users)**

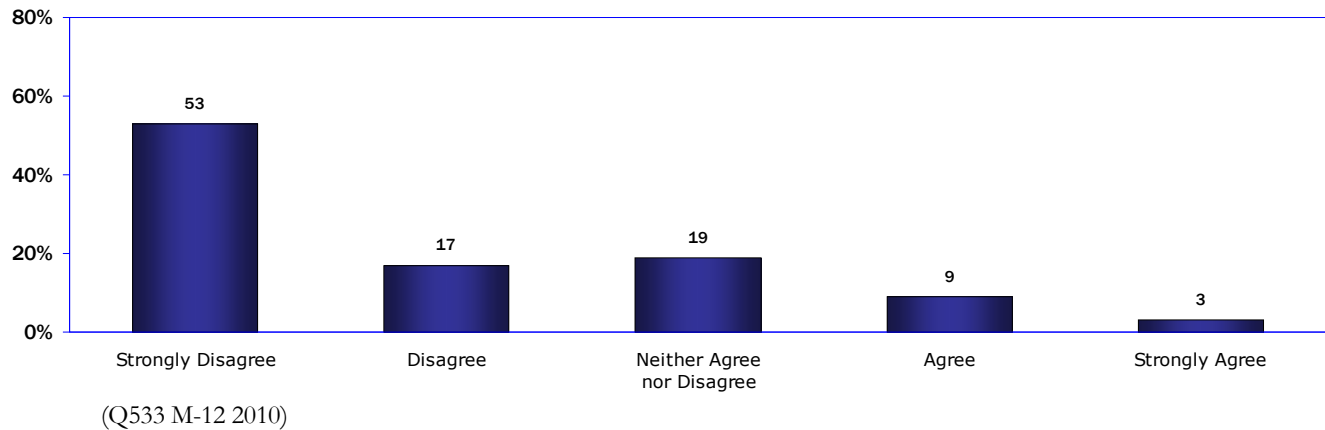


(Q533 M-11 2010)

132. Reaching Out to Others Online for Help During the Economic Crisis

Compared to those who say they share their views about the economic crisis with others online (*see page 146*), fewer – 12 percent – reach out more often to others online to get help through the recession.

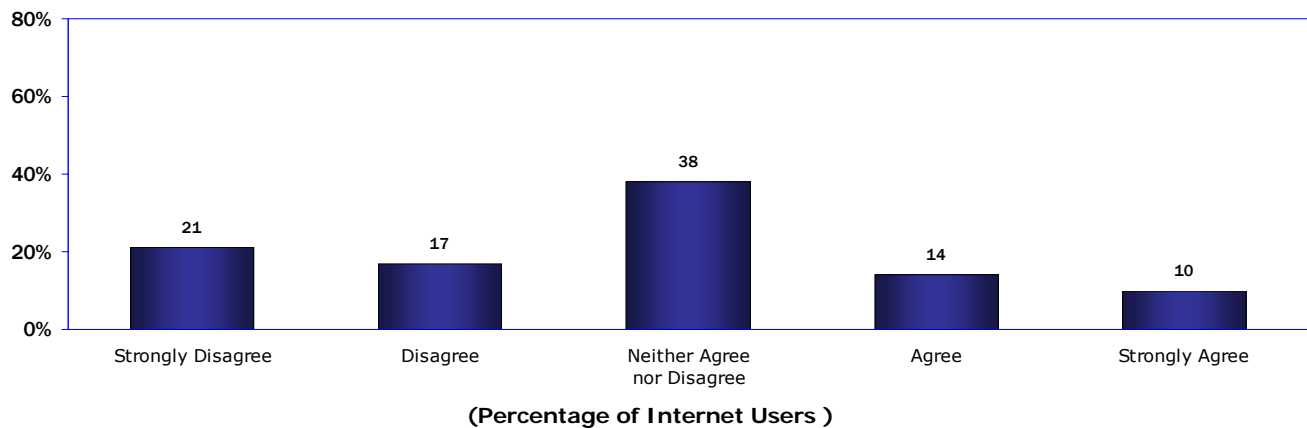
**I Have Found Myself More Often Reaching Out to Others Online
to Help Me Through the Tough Times We are Encountering
(Percentage of Internet Users)**



133. Was the Internet Helpful During the Recession?

Even though few Internet users found benefit in communicating with others about the recession, and they did not seek help from others or go online more often to cope with tough economic times (*see the previous two pages*), only 24 percent said that the Internet was not helpful to them during the economic crisis.

The Internet Has Not Been Very Helpful to Me in the Current Tough Times



(Q533 M-13)

Social Effects: Online Communities

***Average length of membership
in an online community (years)*** **3.7**

***Online community members
who log in to their community
at least once a day*** **58%**

***Online community members
who take offline actions related
to their online communities
at least monthly*** **35%**

***Online community members
who meet members of their
online community in person*** **50%**

***Online community members
who said they feel as strongly
about their communities as they
do about their real world
communities*** **53%**

Online Communities

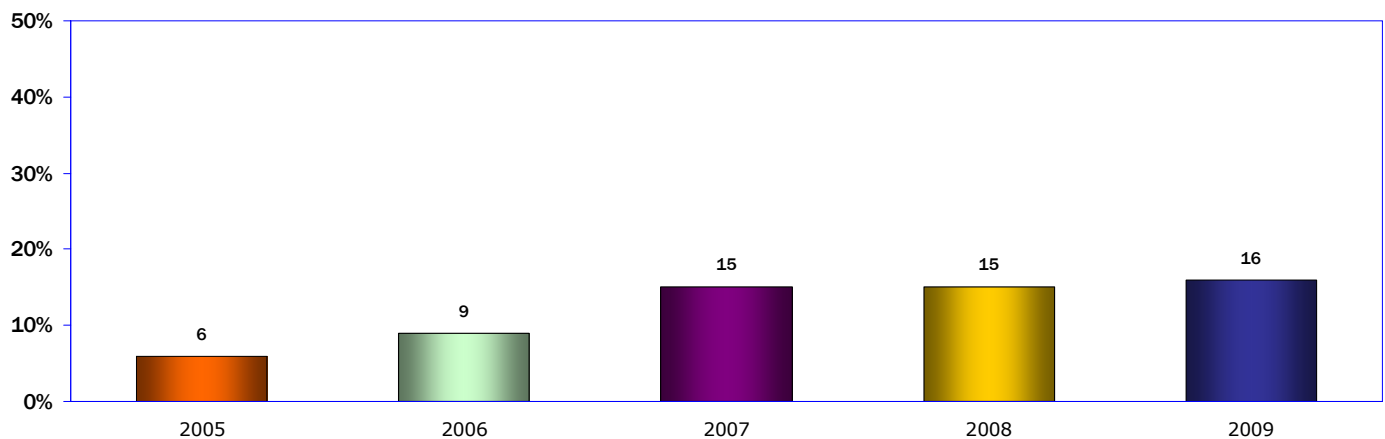
For the Digital Future Project, an “online community” is defined as a group that shares thoughts or ideas, or works on common projects, through electronic communication only.

These online communities represent broad interests -- professional, social, spiritual, hobby, and political, among others.

I34. Are You a Member of an Online Community?

Membership in an online community has remained generally stable for three years in the Digital Future Studies, increasing only marginally to 16 percent in the current study, up from 15 percent in 2008, but nevertheless a peak level in the project thus far.

Are You A Member of an Online Community?
(Percentage of Internet Users)

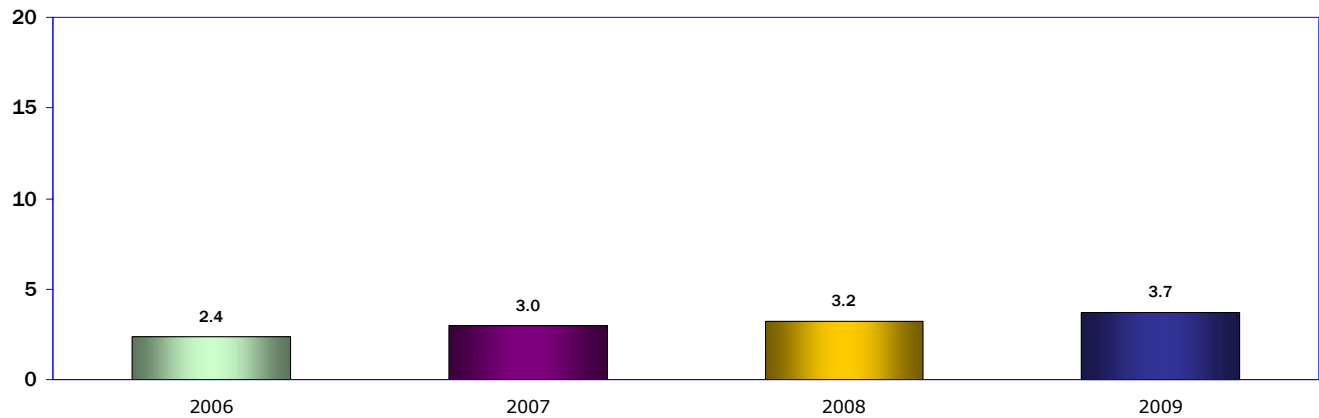


(Q1202 M-2 2010)

I35. Membership in Online Communities: How Long?

Users continue to report increasing average time as members of online communities – now 3.7 years, a new high level thus far for the Digital Future Studies.

How Long Have You Been a Member of Your Online Community?



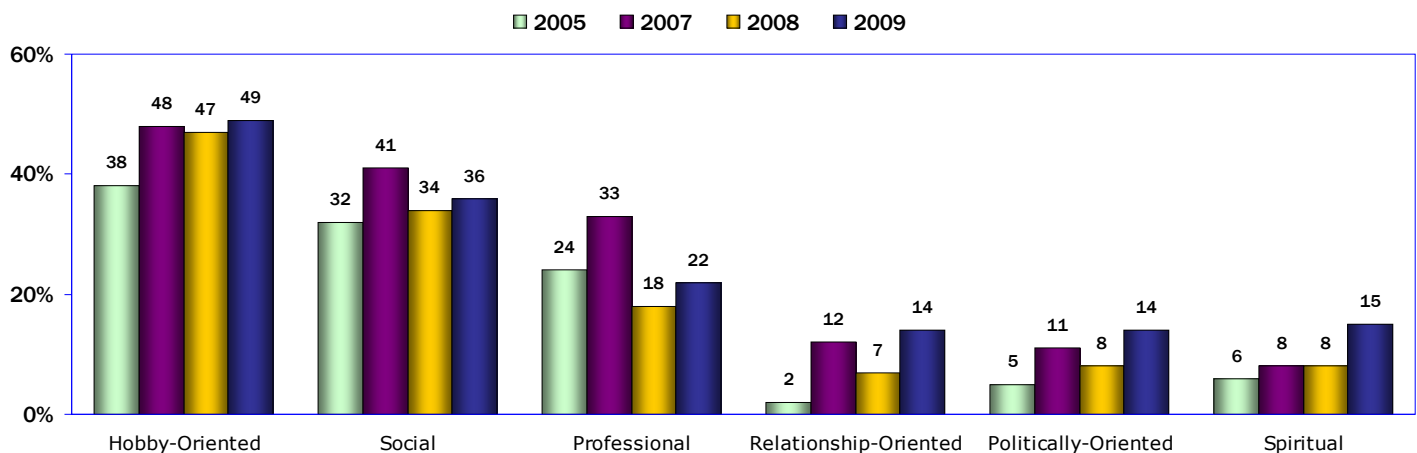
(Q1203A M-1 2010)

(If a member of multiple communities, how long have you been a member of the single most important of those communities?)

I36. Membership of Online Communities

Online communities involving hobbies are joined by 49 percent of users who are members of online communities, a small increase over the 47 percent reported in 2008. Thirty-six percent of online community members said their community was for social purposes, while 22 percent said they were involved in communities related to their professions.

What is the Nature of Your Online Community?
(Percentage of Online Community Members)



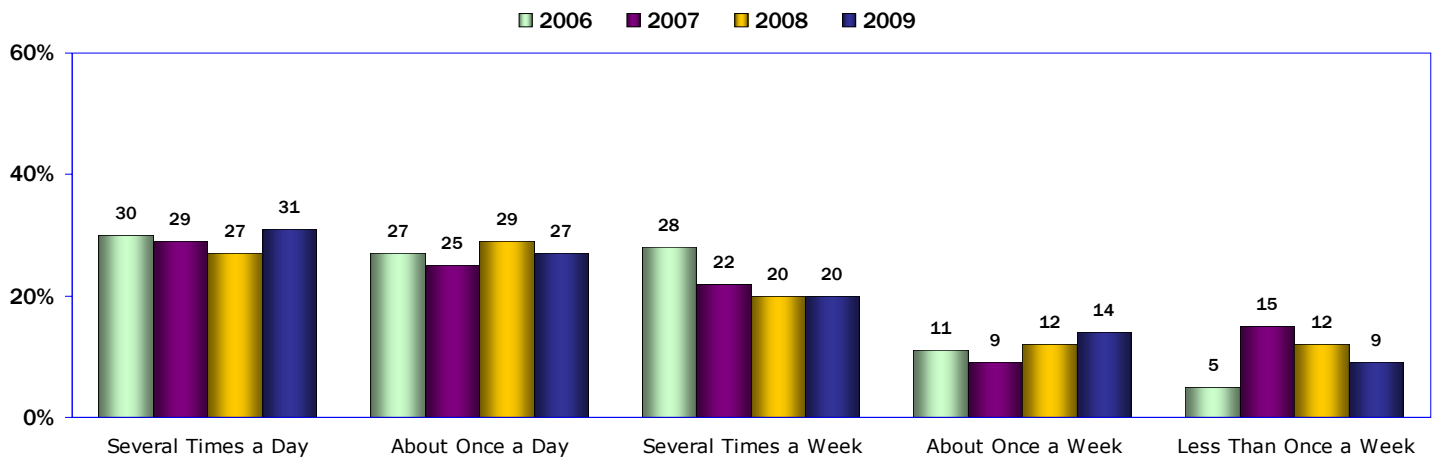
(Q1202A M-1 2010) (Multiple responses possible)

I37. Online Community Members: How Often Do They Log In?

In the current study, the online community members who said they logged into their community several times a day increased to 31 percent, a new high for the Digital Future Project.

Seventy-eight percent of members log into their online community more than once a week (several times a day, about once a day, or several times a week). Fifty-eight percent log in at least once a day – also a new high figure for the study.

How Often do You Log In to Your Online Community?
(Percentage of Online Community Members)



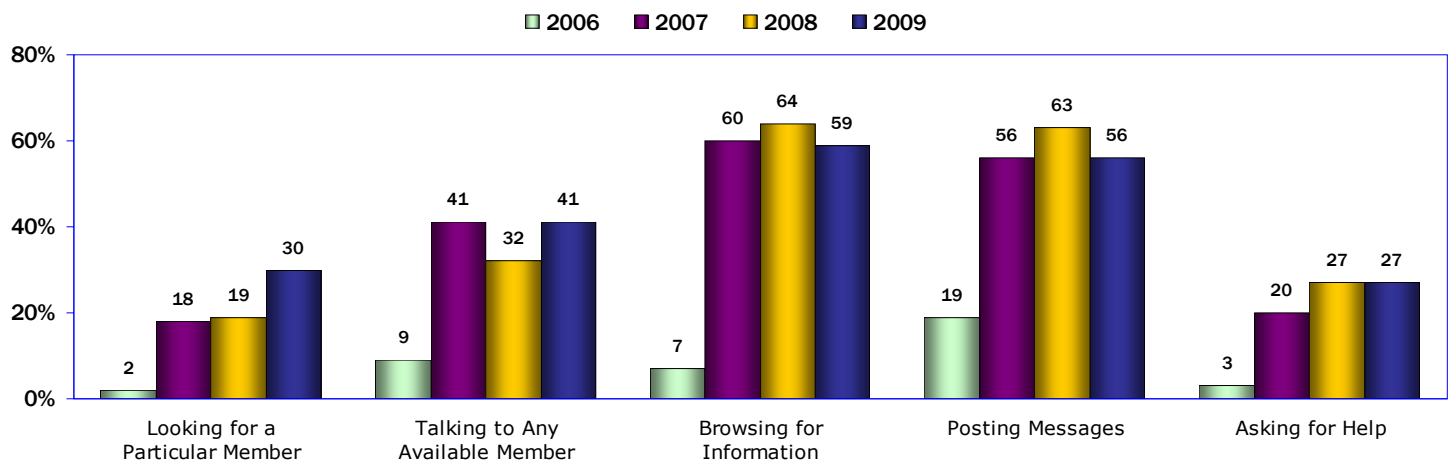
(Q1204 M-2 2010)

I38. What do you do when you are logged into your online community?

Large percentages of members of online communities spend their time in those communities looking for information (59 percent), down from the previous high in 2008. Fifty-six percent post messages, also down from the previous high in 2008.

Thirty percent of members go to their online community to look for another member, an increase from 19 percent in 2008.

Activities in Online Communities
(Percentage of Online Communities Members)



(Q1205 M-1 2010) Multiple responses OK; if multiple communities, the single most important of those communities)

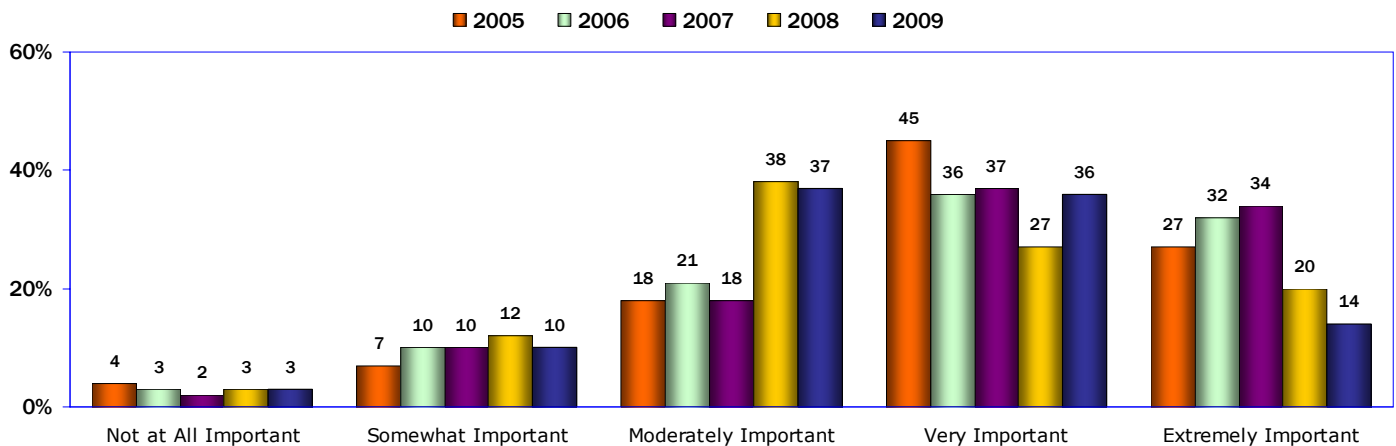
I39. Online Communities: Are They Useful and Important?

A larger percentage of online community members in the current Digital Future study compared to 2008 said their online communities were useful and important.

Fifty percent of members of online communities said their community is very important or extremely important to them – up from the 47 percent reported in 2008, but considerably below the peak response of 72 percent reported in 2005.

However, the percentage of those who said their online community is extremely important dropped for the second year in a row, now to 14 percent – down from 34 percent in 2007.

How Useful and Important is Your Online Community (Or Communities) to You?
(Percentage of Online Community Members)

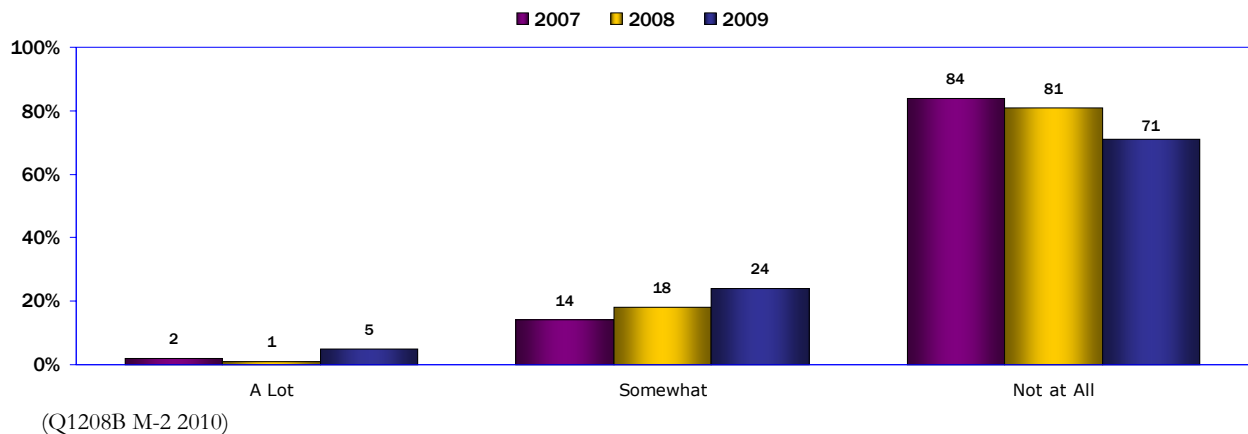


(Q1202B M-2 2010)

I40. Participation in Online Communities: Does It Affect Involvement in Offline Communities?

Most online community members – 71 percent in the current study -- said that their participation in those communities does not affect their involvement in offline communities. However, a growing percentage said that this involvement has decreased their involvement in offline communities somewhat or a lot -- 29 percent in the current study, compared to 19 percent in 2008 and 16 percent in 2007.

**Has Your Participation in Online Communities
Decreased Your Involvement in Offline Communities?
(Percentage of Online Community Members)**

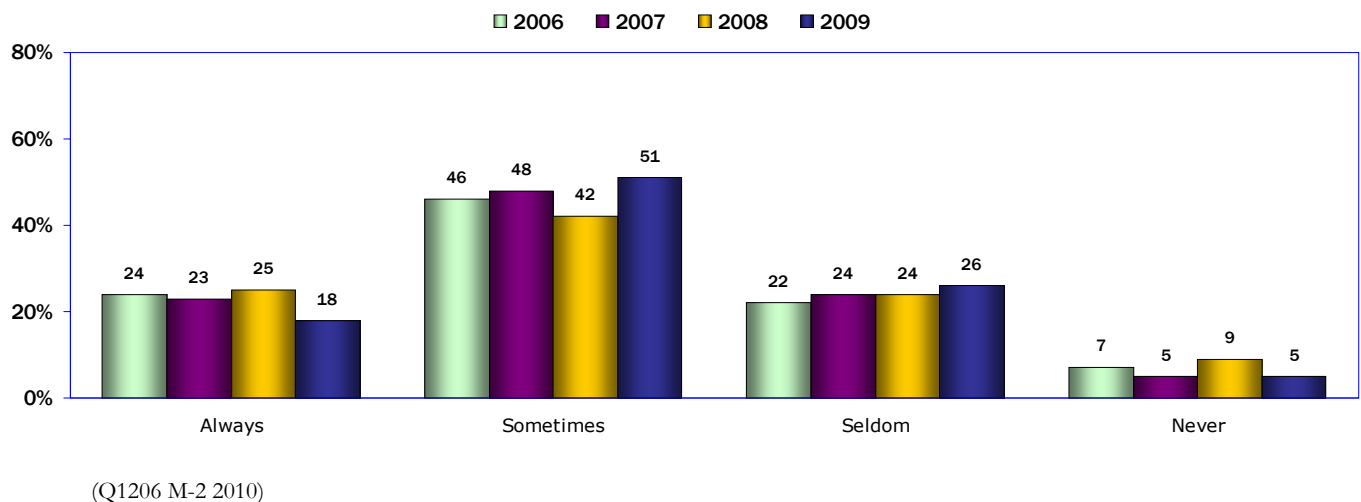


I41. Online Community Members: Online Interaction

Among all online community member, 52 percent said they usually interact with other members once they are logged into their online community. (Q1207 M-1)

The percentage of online community members who said they interact with other members of their community sometimes or always increased to 69 percent, up from 67 percent in 2008.

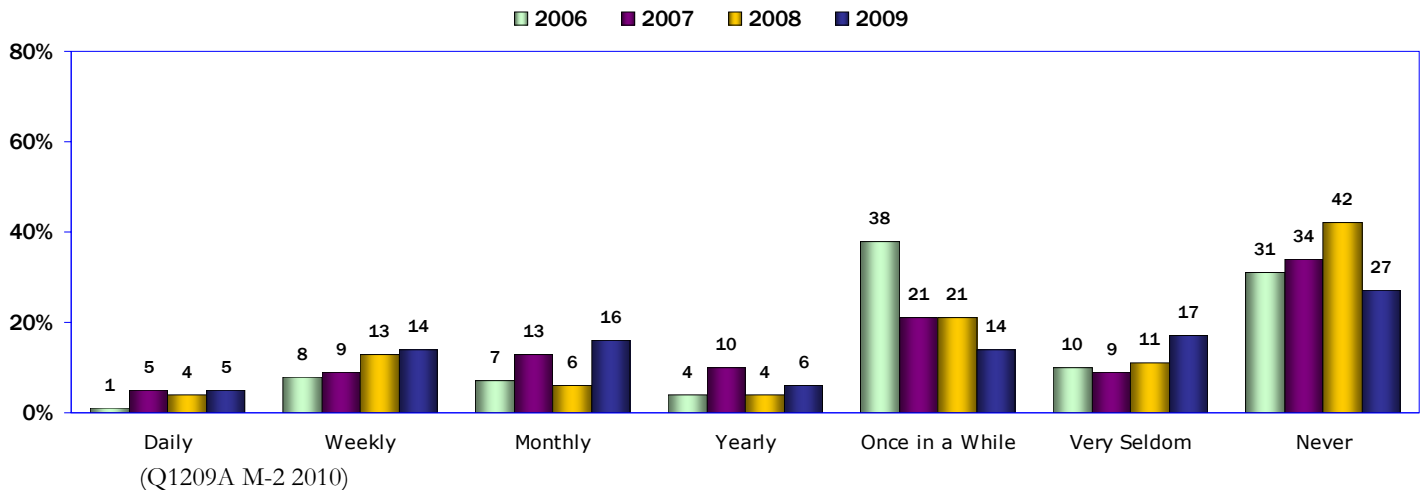
**How Often Do You Interact With Other Members Of Your Online Community?
(Percentage of Online Community Members)**



I42. Online Communities: Connection To Offline Actions

In the current study, an increasing percentage of online community members (35 percent) said they take actions offline at least monthly that are related to their online community, such as attending a meeting or seeing a doctor – up from 23 percent in 2008.

How Often do You Take Action Offline, such as Seeing a Doctor or Attending a Meeting, Related to Your Online Community?
(Percentage of Online Community Members)

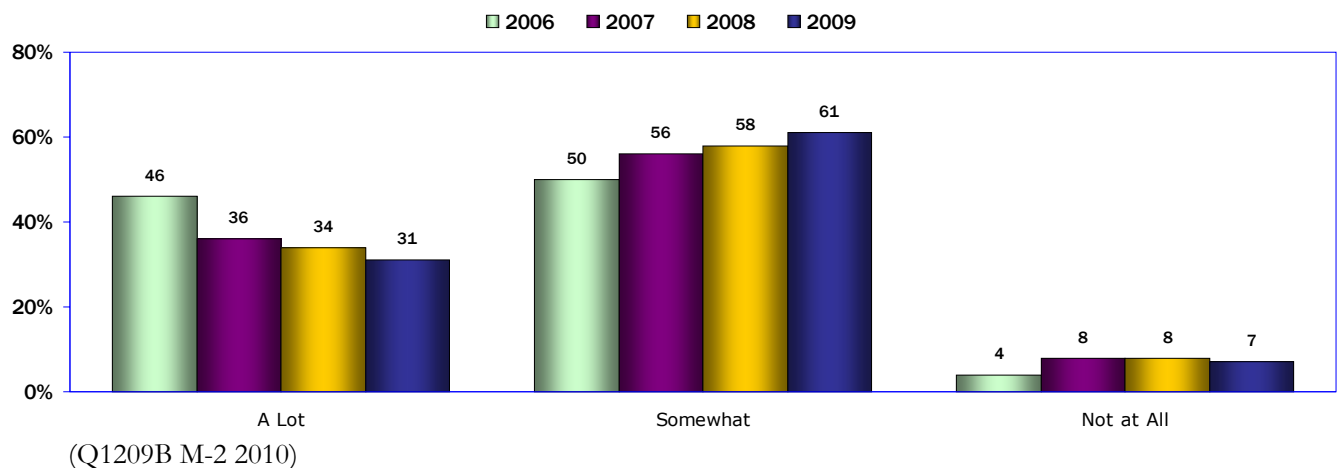


I43. Online Communities: Are They Beneficial for Members?

For the third year in a row, the percentage who find a large amount of benefit from their online community declined.

In the current study, 31 percent said they benefit a lot from their online communities, compared to 36 percent in 2008 and 36 percent in 2007. However, the percentage who found no benefits in that online community declined marginally, to seven percent, down from eight percent in 2008 and 2007.

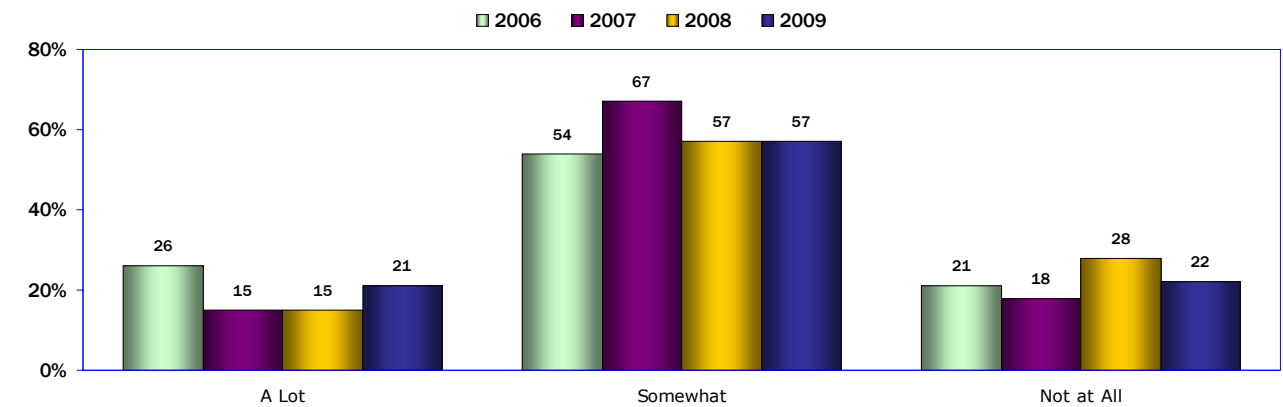
How Much do You Think You Benefit from Your Online Community?
(Percentage of Online Community Members)



I44. Online Community Members: Do They Contribute To Building Their Communities?

A growing percentage of online community members said they contribute to the building of that community somewhat or a lot – now 78 percent, up from 72 percent in 2008.

How Much do You Contribute to the Building of Your Online Community?
(Percentage of Online Community Members)

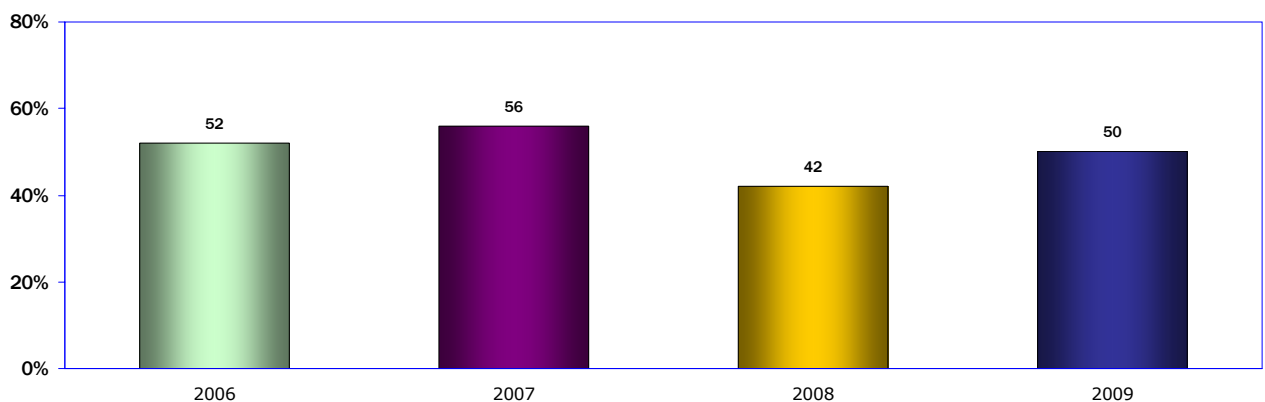


(Q1209D M-2 2010)

I45. Online Community Members: Do They Meet Members Of Their Community In Person?

Half of online community members said they meet in person with members of their online communities, up from 42 percent in 2008 but down from 2006 and 2007.

Do You Meet Members of Your Online Community in Person
(Online Community Members Responding Yes)



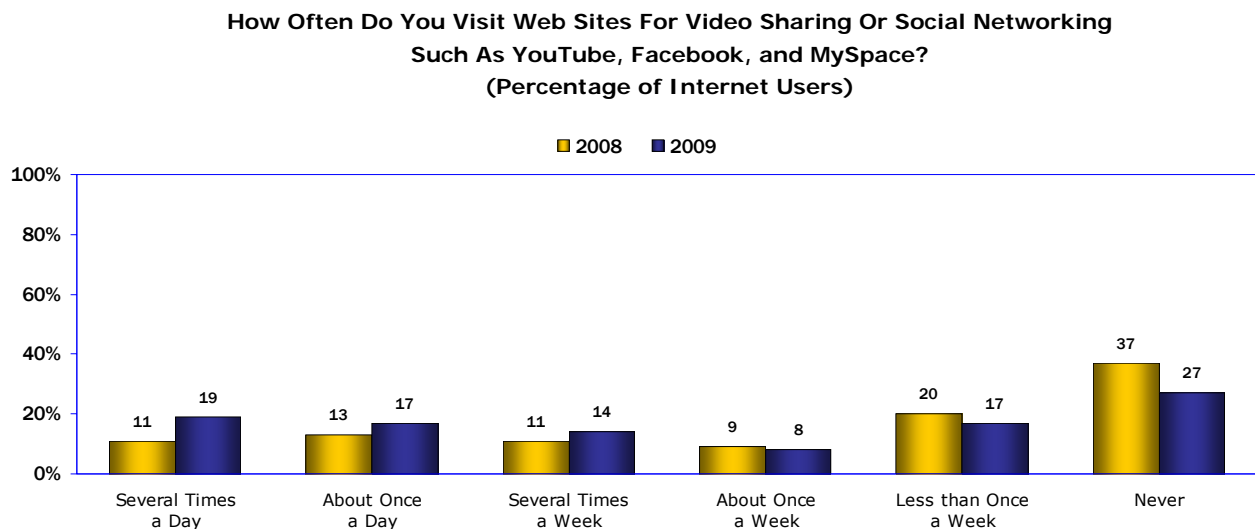
(Q1208A M-1 2010)

Social Networking Sites

I 46. Web Sites for Video Sharing or Social Networking: How Often Do You Visit?

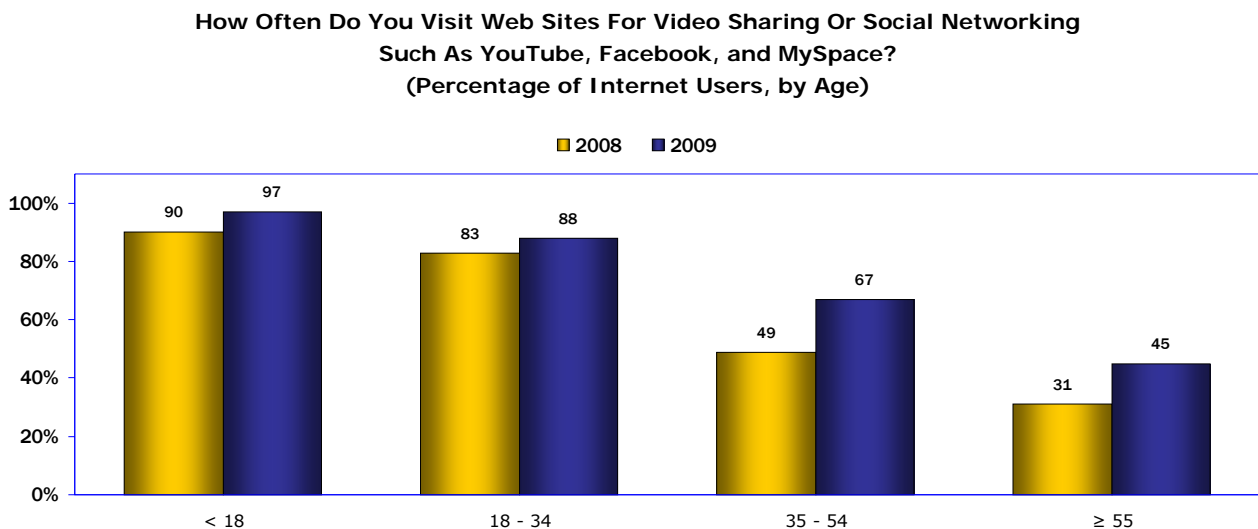
When asked how often they visit Web sites for video sharing or social networking such as YouTube or Facebook, 58 percent of Internet users said they use these sites once a week or more – up considerably from 44 percent in 2008.

The percentage of Internet users who never visit Web sites for video sharing or social networking dropped to 27 percent of Internet users, down from 37 percent in 2008.



(Q1209H M-1 2010)

Looking at the age of users of who visit video sharing or social networking sites shows extremely large and growing participation among younger users, with almost all users under 18 (97 percent) and 88 percent of users age 18-34 using these sites.

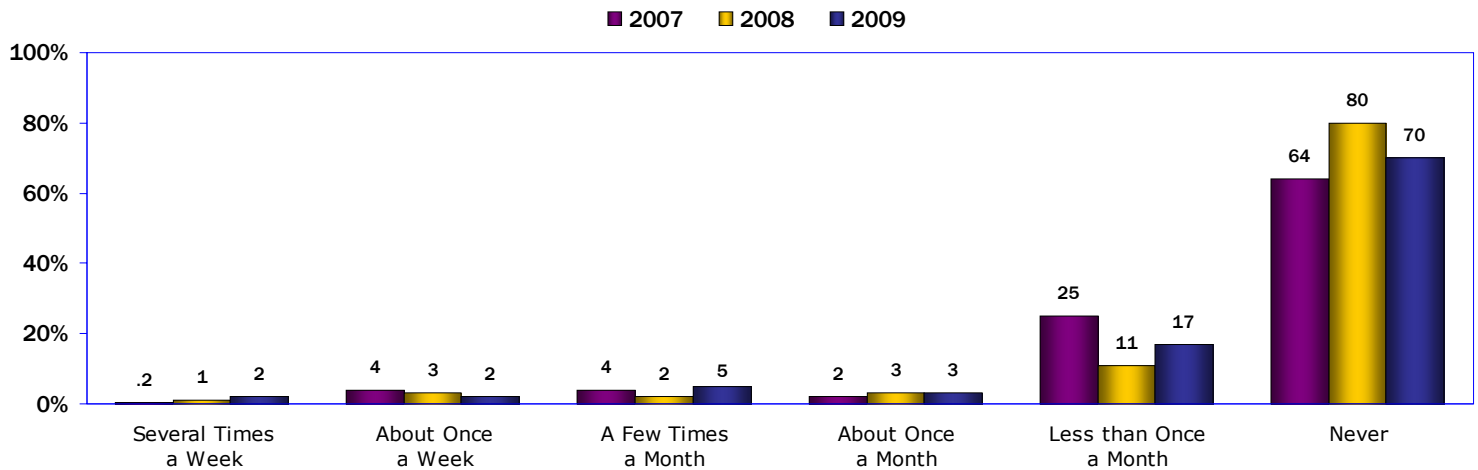


(Q1209H M-1 2010)

I47. Creating Content for Video Sharing or Social Networking Sites

Compared to those who visit video sharing or social networking sites, a much smaller but growing percentage of Internet users create video content for these sites. In the current study, 30 percent of users create content, up from 20 percent in 2008.

**How Often Do You Create Videos or Other Content to Post on Web Sites
Such as YouTube, MySpace, and Facebook?
(Percentage of Internet Users)**



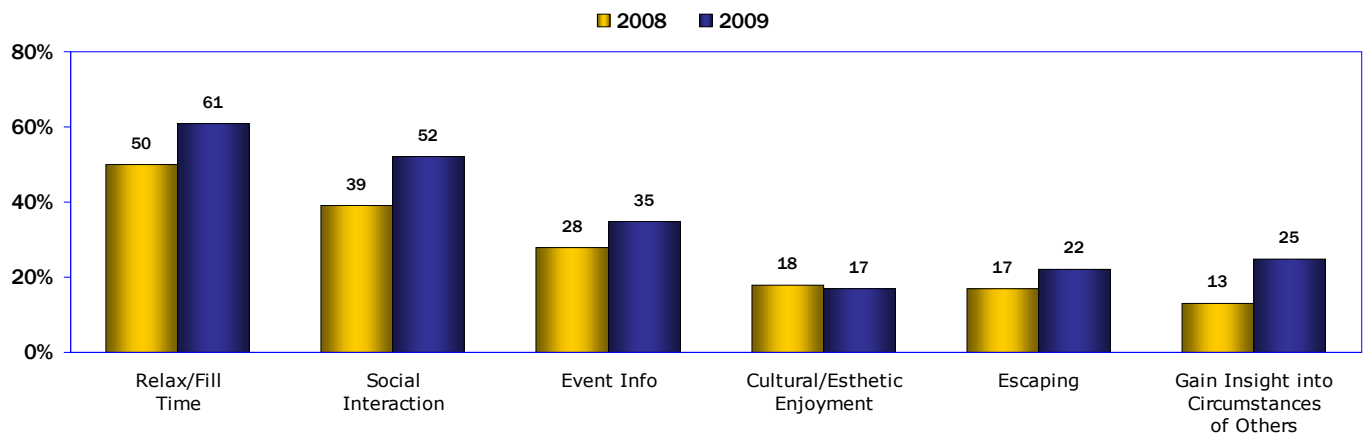
(Q1209J M-2 2010)

I48. Why Do Online Community Members Visit Web Sites For Video Sharing and Social Networking?

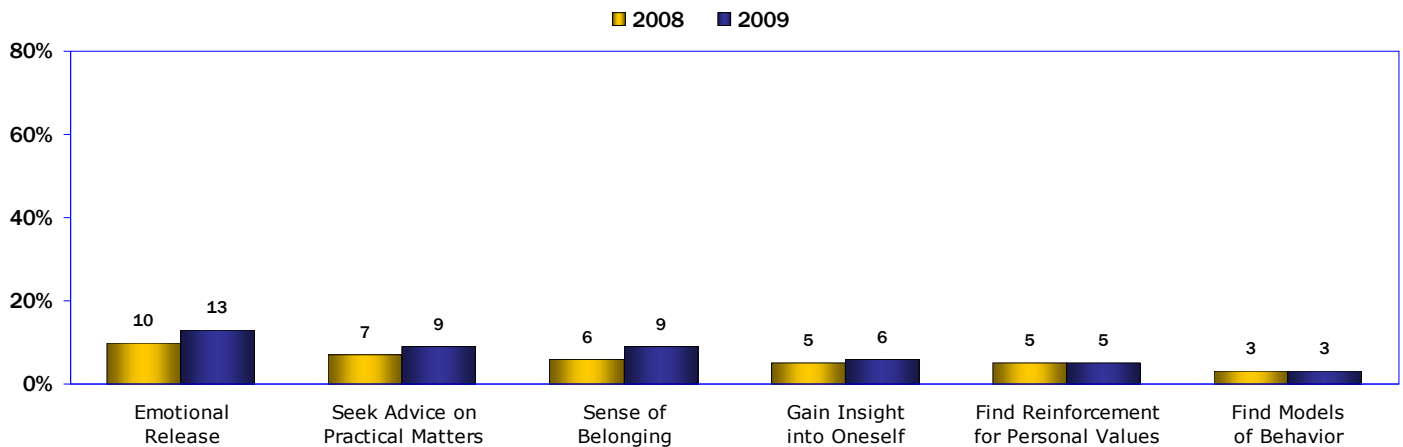
The largest and a growing percentage of Internet users who visit social networking sites such as YouTube, and social networking Web sites such as Facebook and MySpace do so to relax or fill time – 61 percent in the current Digital Future Project, up from 50 percent in 2008.

The other reasons reported by one-quarter or more of users who visit social networking sites are social interaction, to seek event information, or to gain insight into the circumstances of others – all percentages that increased over 2008.

**Reasons for Visiting Web Sites for Video Sharing and Social Networking
Such as YouTube, MySpace, and Facebook**



(Percentage of Internet Users Who Visit Social Networking or Video Sharing Sites)



(Q1209I M-1A and M-1B 2010) (Multiple responses possible)

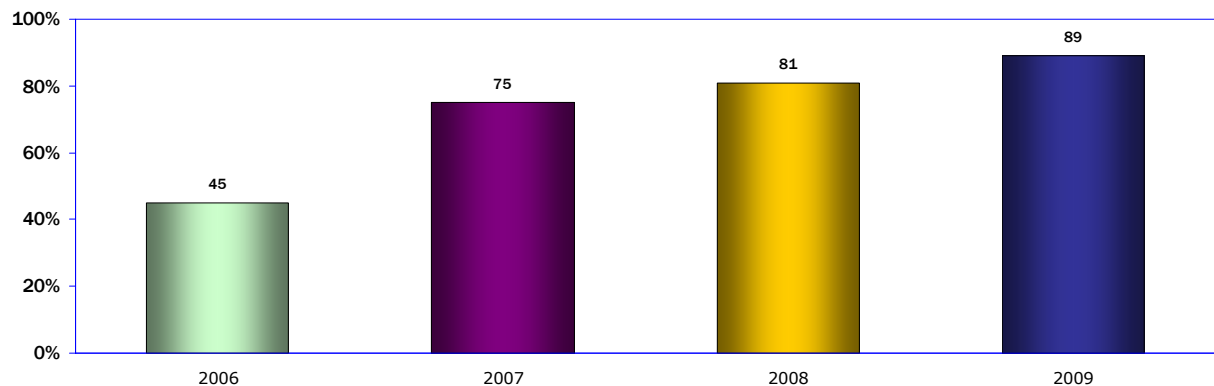
Online Communities And Social Causes

I49. Participation in Online Communities Related to Social Causes

A very large and growing percentage of members of online communities participate in communities related to social causes.

Eighty-nine percent of online community members in the current study said they use the Internet to participate in communities related to social causes -- up from 81 percent in 2008, and a new peak for the Digital Future Project.

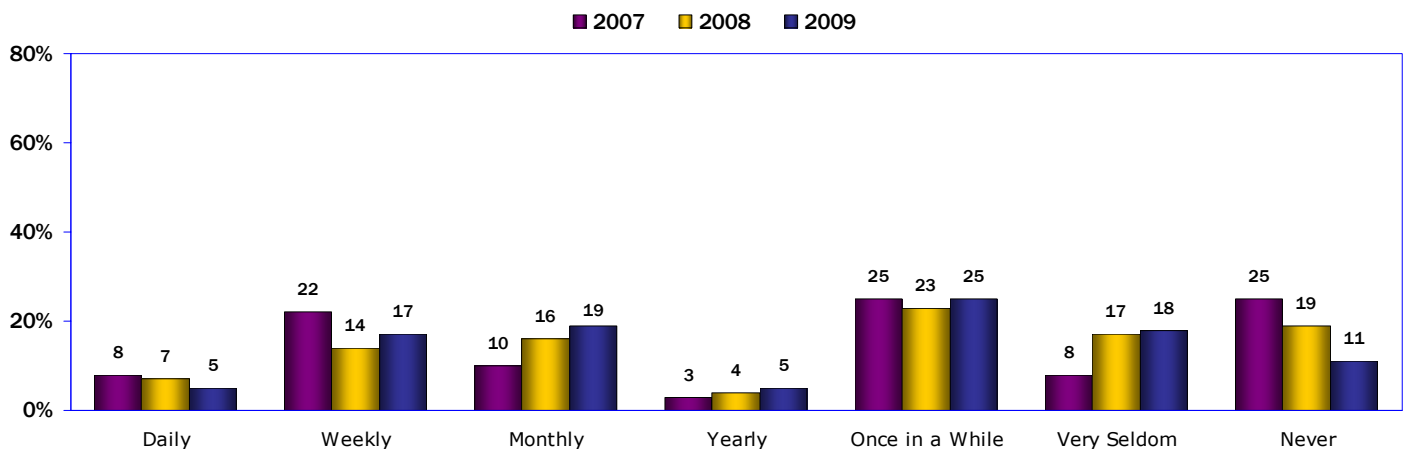
Do You Use the Internet to Participate in Communities Related to Social Causes?
(Members of Online Communities Answering Yes)



(Q1209E M-2 2010)

Forty-one percent of online community members said they use the Internet at least monthly to participate in communities related to social causes – up from 37 percent and another new high thus far for the Digital Future Project.

How Often do You Use the Internet to Participate in Online Communities Related to Social Causes?
(Percentage of Online Community Members)

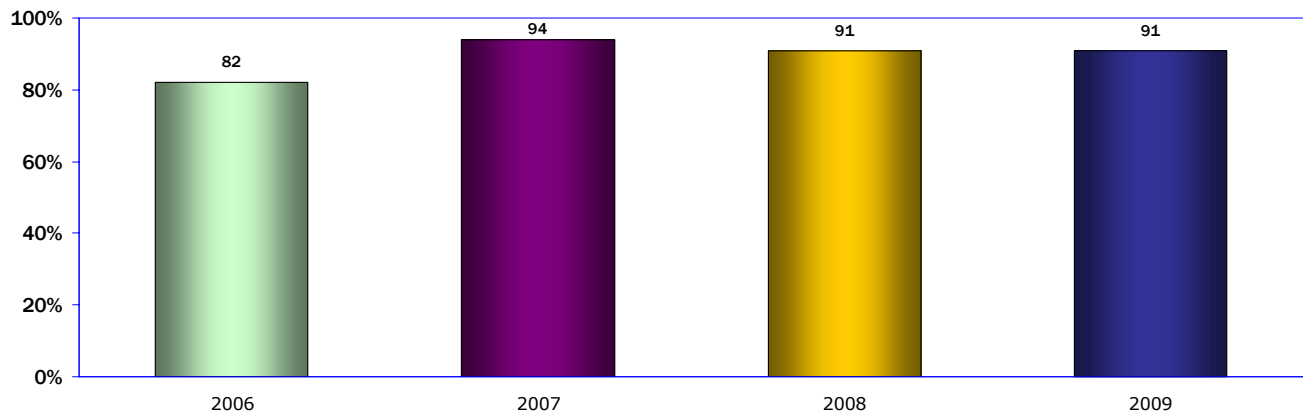


(Q1209E M-1 2010)

150. The Internet as an Information Source about Social Causes

The percentage of online community members who said the Internet helps them stay informed about social causes remains high in the current study, at 91 percent.

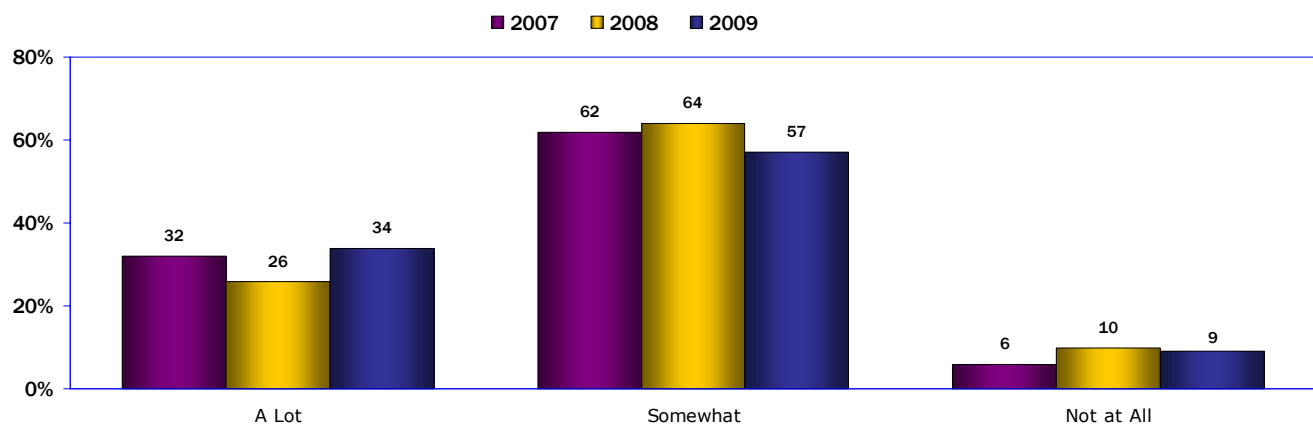
Has the Internet Helped You be More Informed about Social Causes?
(Percentage of Online Community Members Responding Yes)



(Q1209F M-2 2010)

More than one-third of online community members said the Internet helps them stay informed “a lot” about social causes, while only nine percent said that the Internet did not help them stay informed at all about social causes.

Has the Internet Helped You be More Informed about Social Causes?
(Percentage of Online Community Members Responding Yes)

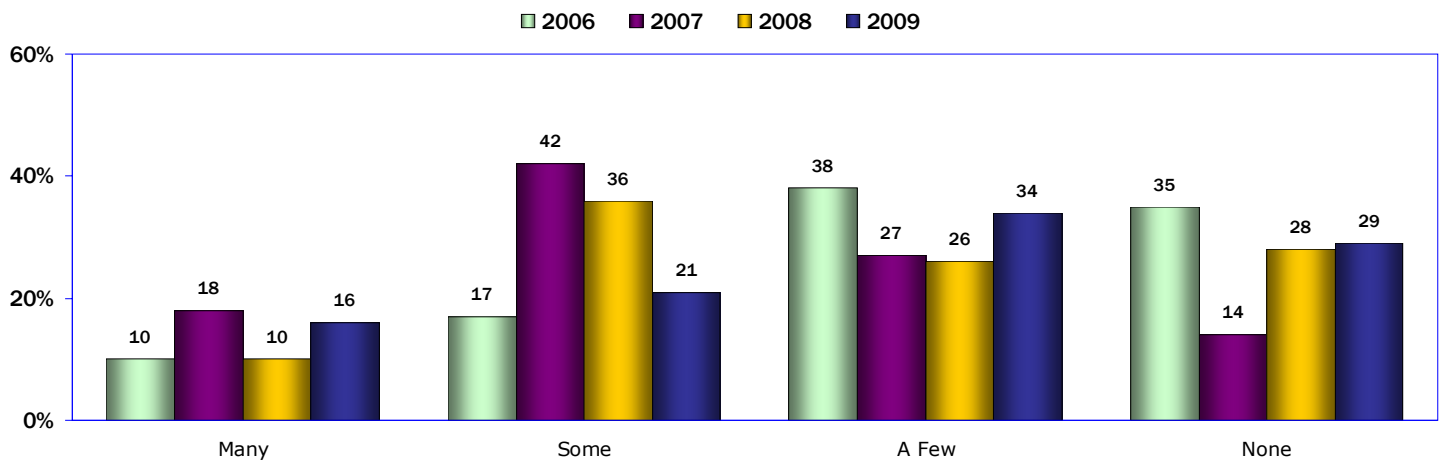


(Q1209F M-1 2010)

151. Do Online Communities Encourage Members to Participate in Social Causes?

Seventy-one percent of online community members said they participate in social causes new to them since they became involved in online communities -- down marginally from 72 percent in 2008.

**How Many Social Causes that You Participate in are New to You
Since Becoming Involved in Online Communities?
(Percentage of Online Community Members Who Participate in Social Causes)**

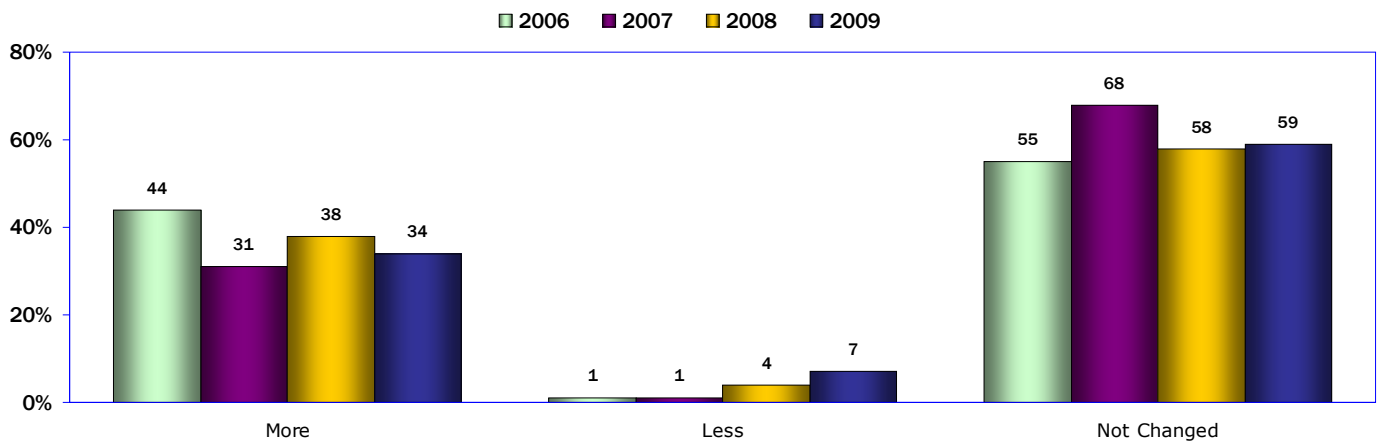


(Q1209E1 M-1 2010)

152. Social Activism and Participation In Online Communities

A smaller percentage of users in the current Digital Future study – 34 percent -- said their social activism has increased since they began participating in online communities, down from 38 percent in 2008.

Effect on Social Activism since Participating in Online Communities
(Percentage of Online Community Members Who Participate in Social Causes)

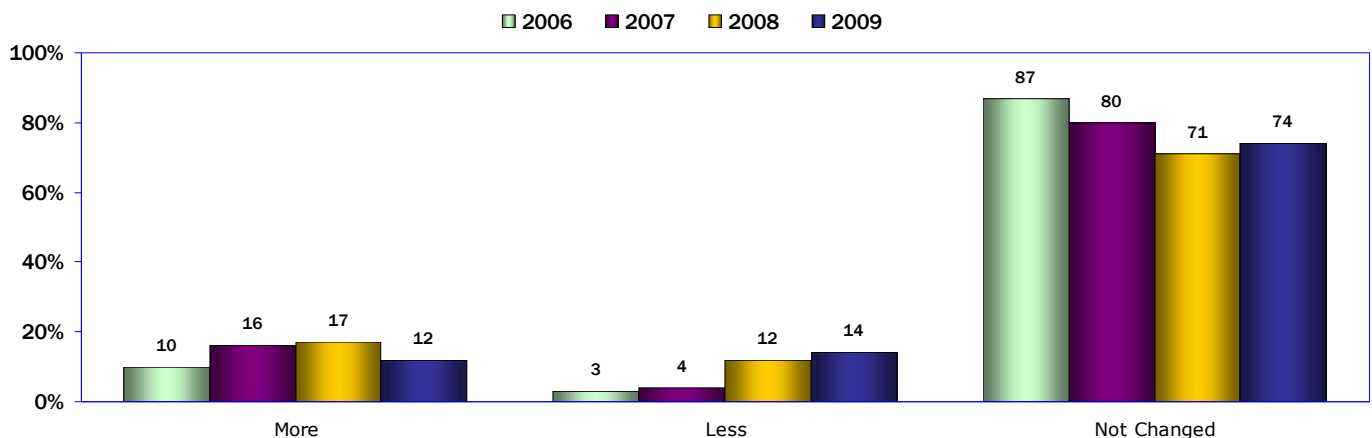


(Q1209E2 M-1 2010)

153. Has Offline Participation In Social Issues Changed Because of Online Involvement?

While large percentages of online community members report that they participate in social causes online (*see page 160*), only 12 percent said that their offline involvement in social issues has increased as a result of their online participation.

Participation in Social Causes Offline as a Result of Participation in Online Communities
(Percentage of Online Community Members who Participate in Social Causes)



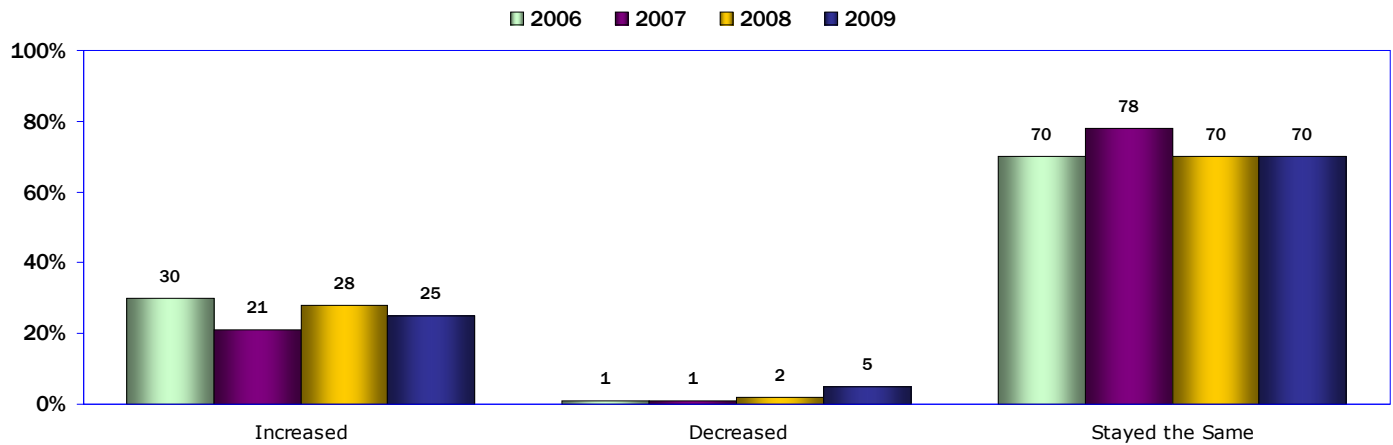
(Q1209E3 M-2 2010)

I54. Online Communities: Participation In Non-Profit Organizations

A small but growing percentage of online community members said that their participation in non-profit organizations has decreased since their Internet use began -- five percent in the current study.

A large percentage of online community members said their involvement in non-profit organizations has stayed the same since they began using the Internet -- unchanged over 2008.

**Level of Involvement in Non-Profit Organizations since Internet Use Began
(Percentage of Online Community Members)**

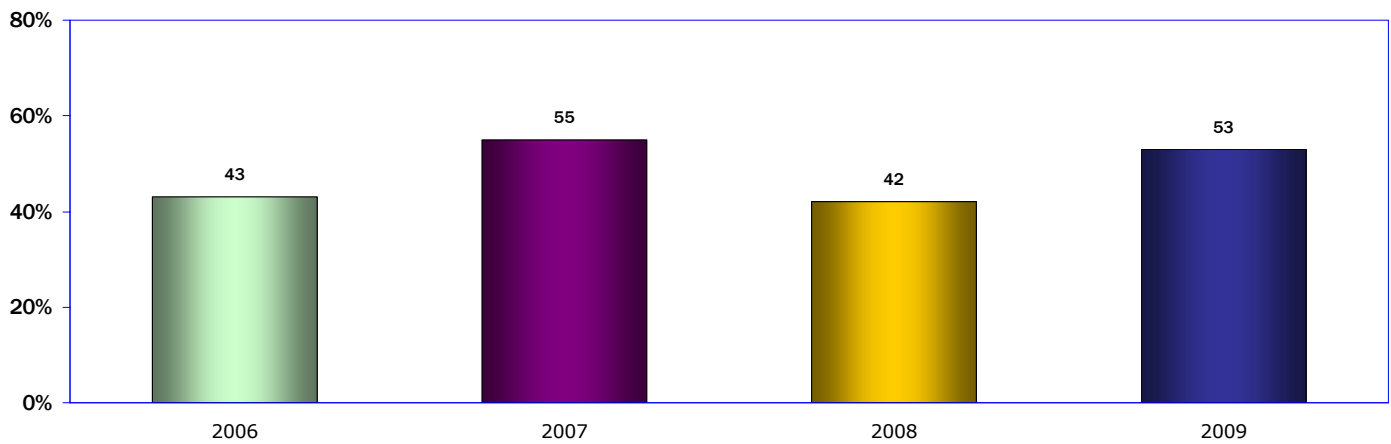


(Q1209G M-2 2010)

155. Online Communities: Are They as Important as the Real World?

The percentage of members of online communities who feel as strongly about their online communities as they do about their real-world communities increased in the current study compared to 2008, growing to 53 percent.

**Do You Feel as Strongly about Your Online Community
as You Feel about Your Real-World Community?**
(Percentage of Online Communities Members Answering Yes)



(Q1209C M-2 2010)

Children and the Internet

***Adults who said the children
in their households. . .***

. . .spend too much time online 23%

***. . .spend too much time
watching television 42%***

***Children who said that
going online is important
to their school work 96%***

***Adults who said that since
going online, the grades of
children in their households
have stayed the same 72%***

***Adults who use denial of the
Internet as a punishment tool 60%***

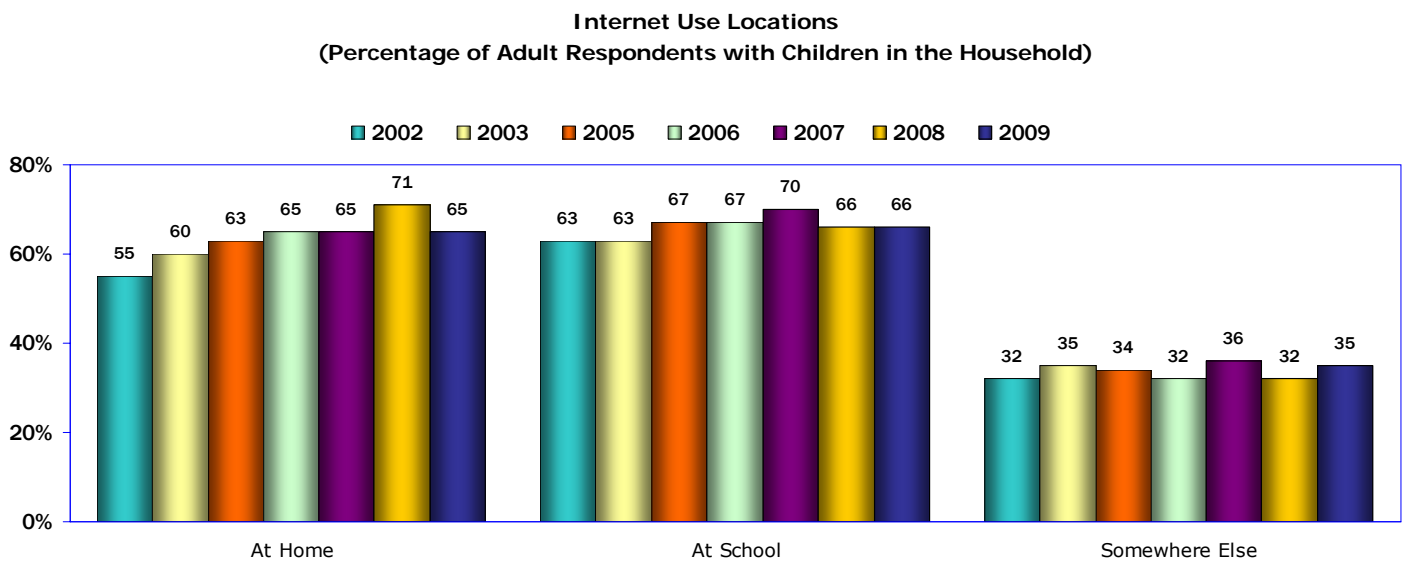
***Adults who said the children
in their household spend the
same amount of time or
more time face-to-face with
friends since using the Internet 87%***

Children And The Internet

I56. From what Locations Do Users under 18 Go Online?

Sixty-six percent of adults said that the children in their households go online at school, the same as in 2008. Sixty-five percent said the children go online at home, down from 71 percent in 2008.

More than one-third of adults (35 percent) said the children in their households go online at an undefined location other than home and school.



(Q1040, 1050, 1060, M-4 2010) (Multiple responses possible)

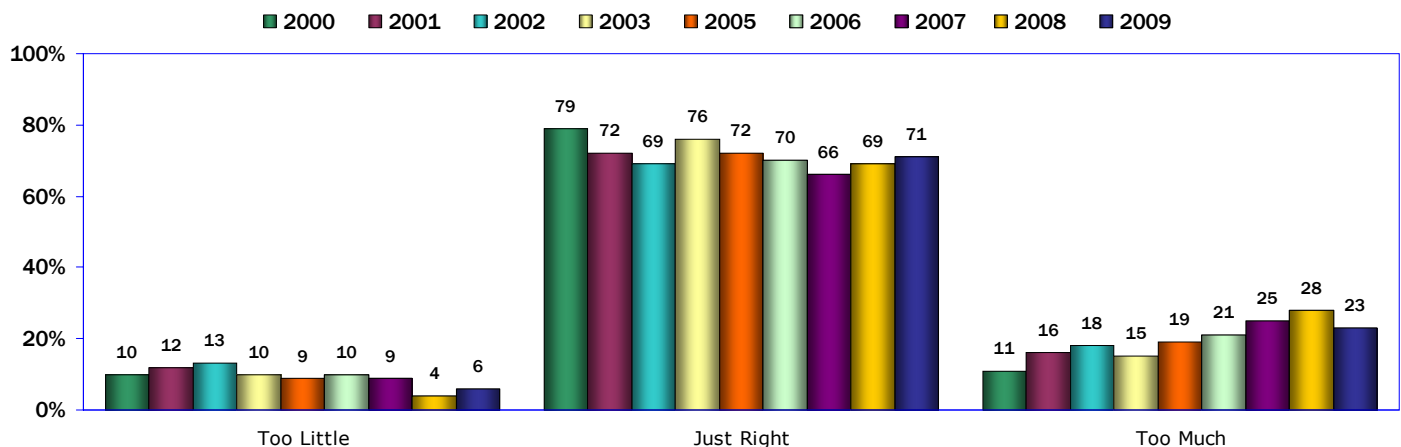
157. Internet Use: the Right Amount of Time For Children?

In the current Digital Future Study, a large and growing majority of adults said the children in their households spend the right amount of time online, or need to spend more time on the Internet.

Seventy-seven percent of adults said the children in their household spend the right amount of time or too little time online. The 71 percent of adults who said the amount of time that children in their household are online is just right has increased for the second year in a row, but is still below the peak response of 79 percent in 2000.

For the first time since 2003, the percentage of adults who said that the children in their households spend too much time using the Internet has declined – down to 23 percent of respondents, a decrease from 28 percent in 2008.

Children Online: The Right Amount Of Time?
(Percentage of Adult Respondents with Children in the Household)



(Q1120 JC-3 2010)

158. Television Viewing: the Right Amount of Time for Children?

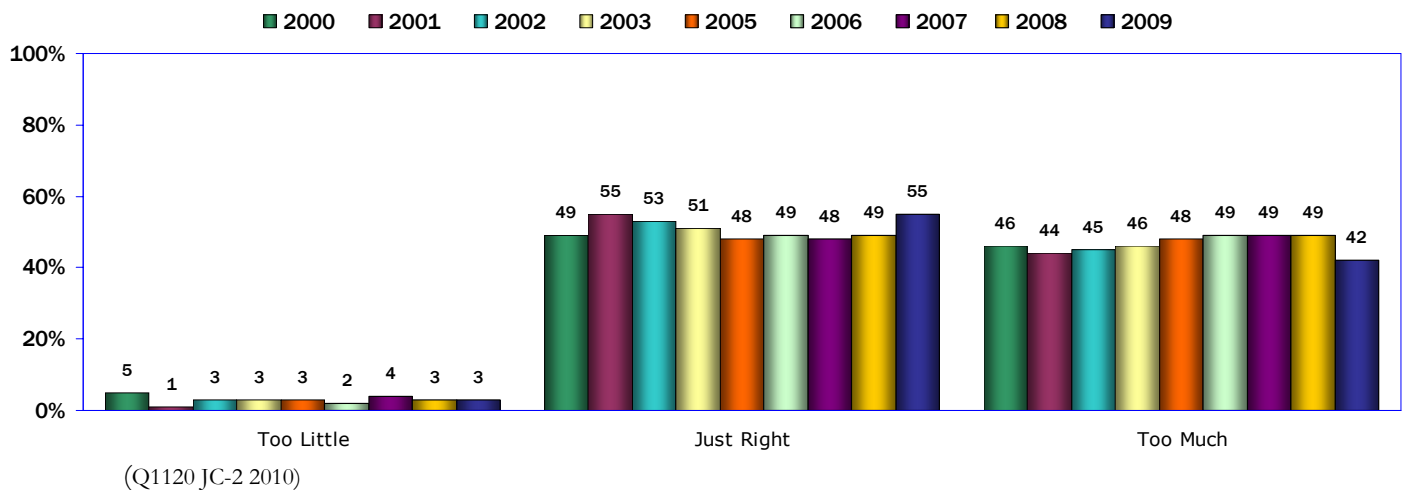
Compared to adult views of children's time spent online, much larger percentages of adults said that the children in their households spend too much time watching television – but that percentage declined in the current study.

Forty-two percent of adults said the children in their households spend too much time watching television (compared to 23 percent in regard to time using the Internet – see previous page). However, this level has decreased from 49 percent in 2008.

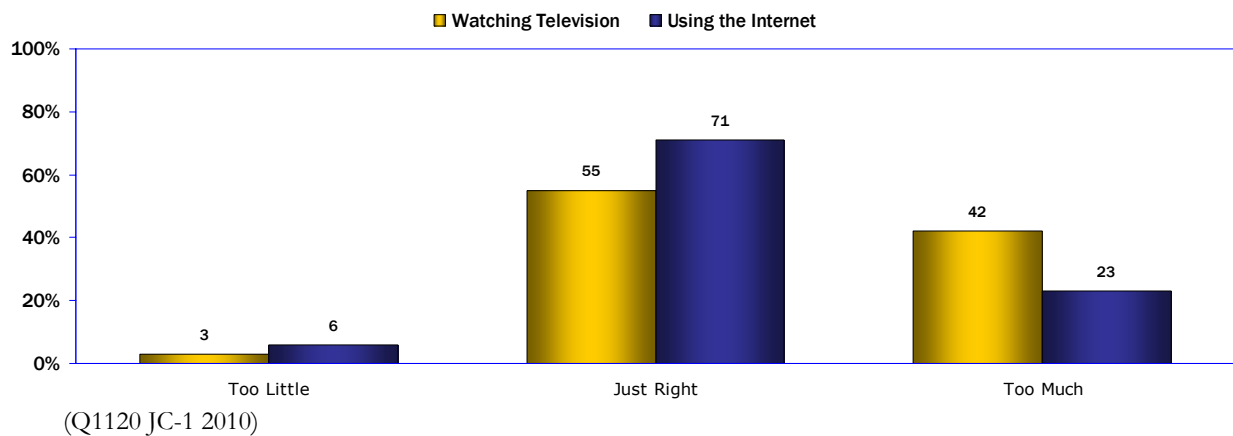
Conversely, the percentage of adults who said that the amount of television children in their households watch is just right increased to 55 percent, which matches the 2001 peak level for this response.

For a comparison of adult views about children's time watching television and going online, see the “at a glance” chart below.

Children Watching TV: The Right Amount of Time?
(Percentage of Adult Respondents with Children in the Household)



Children Online and Watching Television: The Right Amount Of Time?
(Percentage of Adult Respondents with Children in the Household)

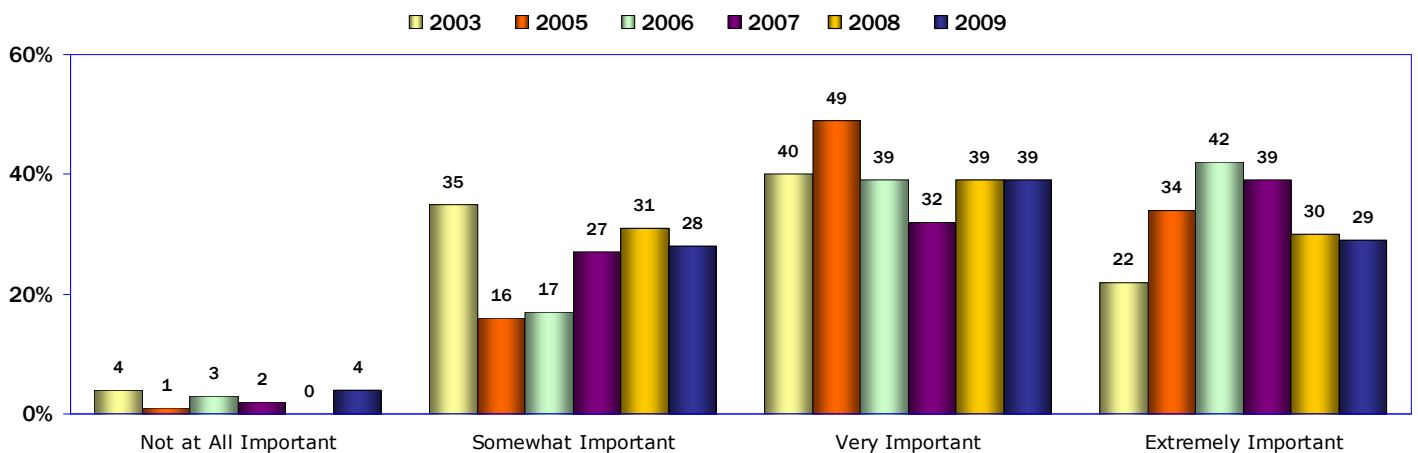


159. The Internet and Schoolwork: Children's Views

Each of the previous Digital Future Studies has produced widely different views among children and adults about the value of the Internet for schoolwork. The current study found an even greater contrast in opinions about the value of the Internet for schoolwork.

In the current study, 96 percent of Internet users age 18 and under said that going online plays some level of importance in their schoolwork; only four percent said the Internet was not at all important. But the percentage that said the Internet was extremely important or very important has declined for four years in a row; 68 percent of children said that the Internet was very important or extremely important for their schoolwork -- down from 69 percent in 2008, 71 percent in 2007, 81 percent in 2006, and 83 percent in 2005.

**How Important is the Internet for Your Schoolwork?
(Percentage of Internet Users Age 18 and Younger)**



(Q1135 JC-2 2010)

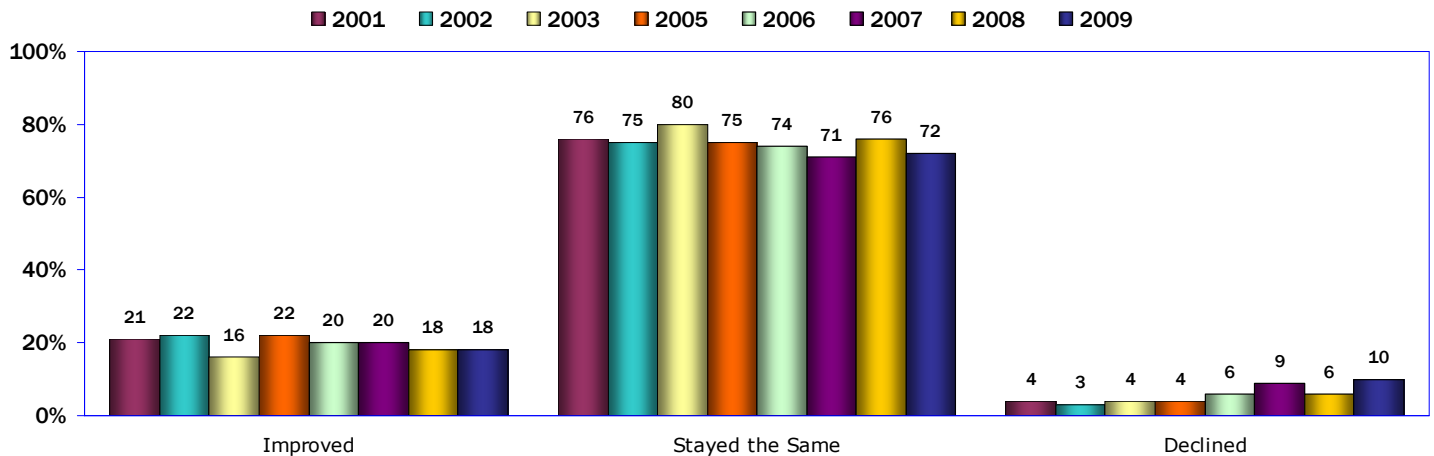
160. Internet Use And School Grades: the Adults' View

Adults report much different views than children about the value of the Internet for schoolwork. More than 80 percent of adults said that going online has no effect on grades or that grades have declined since Internet use began, and the adult view of the Internet as having no influence on grades is growing.

While nearly all children (*see page 170*) said that the Internet had some level of value for their schoolwork, 72 percent of adults in the current study said that since the children in their household have gone online, their grades have stayed the same. And 10 percent of adults said grades have declined since children had access to the Internet – the highest percentage reporting this response in the eight years this question has been asked in the Digital Future Project.

The percentage of adults who said that the grades of the children in their household have improved since the household started to use the Internet has remained stable – 18 percent.

The Internet: Effect on Children's School Grades
(Percentage of Adult Respondents with Children in the Household)



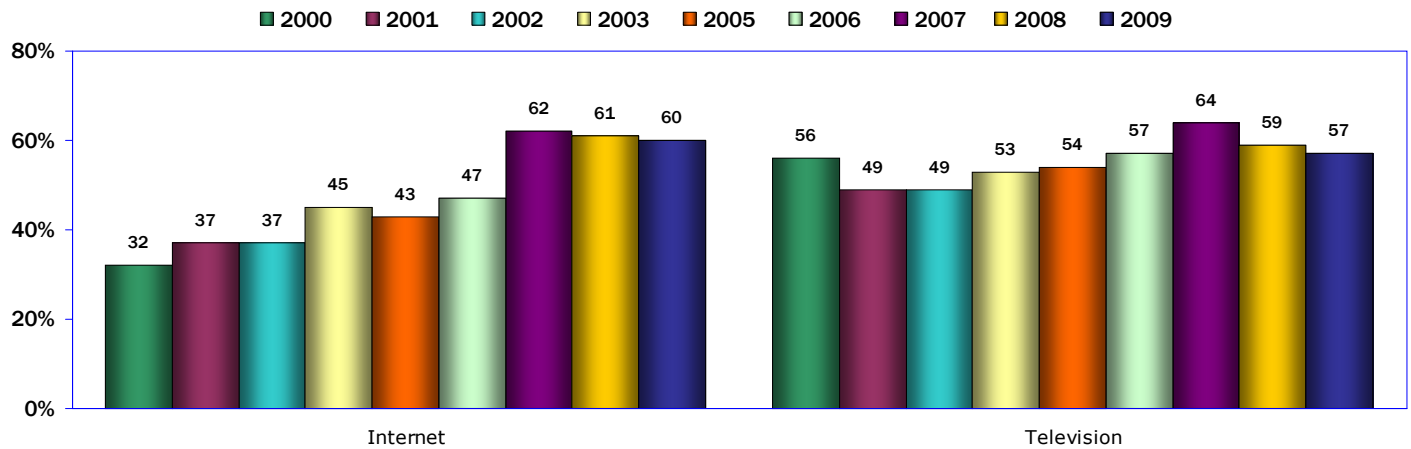
(Q1080 M-3 2010)

161. Internet Use and Television Viewing: Use as a Punishment Tool

Punishing children by denying them access to either the Internet or television has declined for the second year in a row, in both cases decreasing from peak levels reported in 2007.

A slightly higher percentage of adults said they deny Internet access as a punishment tool (60 percent) compared to those who deny television as punishment (57 percent).

Internet Access and Television Viewing: Use as a Punishment Tool
(Percentage of Adult Respondents with Children in the Household)



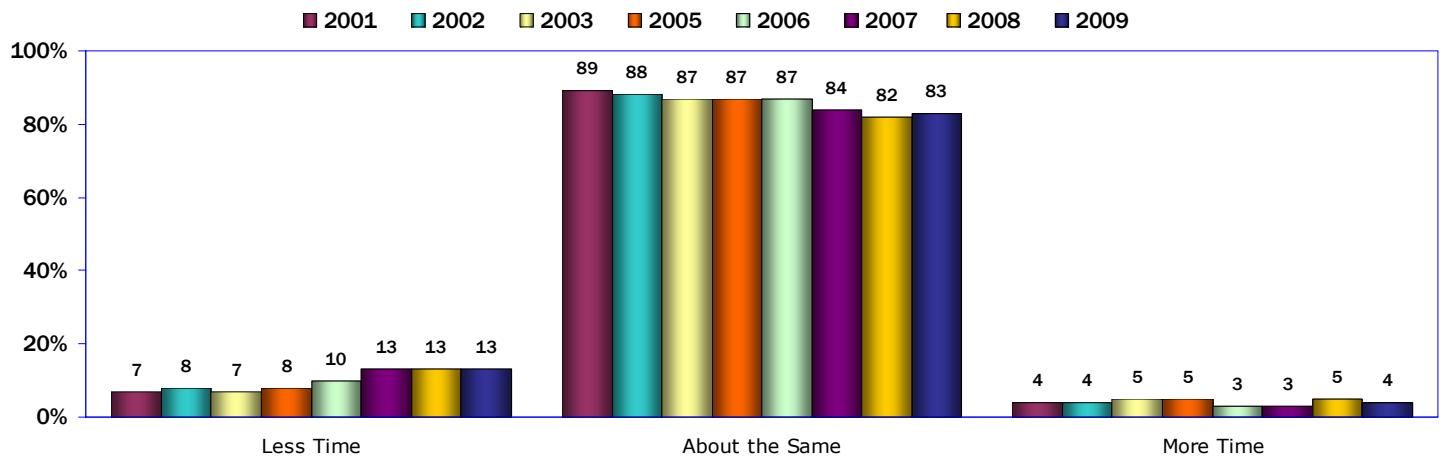
(Q1070 M-3; Q1100 2010)

I 62. Children and Time Spent with Friends

For the third year in a row, 87 percent of adults said that the children in their household spend the same amount of time or more time with friends since using the Internet.

The 13 percent of adults who said that their children spend less time with friends has remained stable for three years in a row, and is still a high point for this response in the Digital Future Project.

Children's Time Spent with Friends Since Using the Internet
(Percentage of Adult Respondents with Children in the Household)



(Q1090 M-1 2010)

Political Power and Influence

Users who said. . .

- . . . the Internet has become important for political campaigns* **72%**
- . . . by using the Internet public officials will care about what people think* **27%**
- . . . the Internet helps people to better understand politics* **58%**
- . . . the Internet can give people more say in what government does* **29%**
- . . . by using the Internet people like you can have more political power* **32%**

Users who went online to gather political information **58%**

Users who were satisfied with election information they found online **86%**

Respondents who agree that they are interested in voting online **35%**

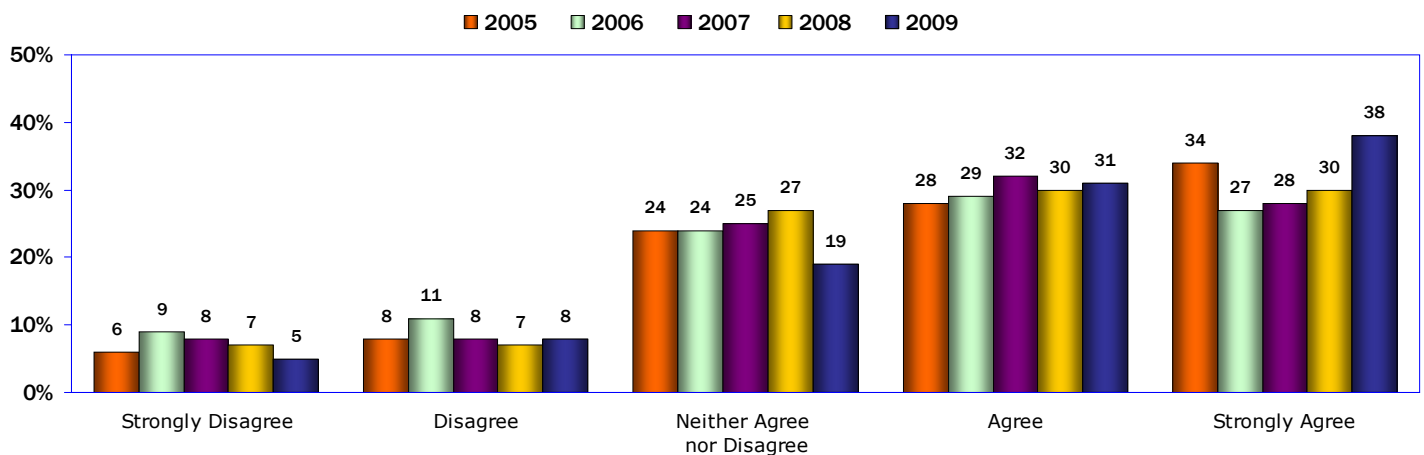
163. The Internet's Importance in Political Campaigns

With online technology and communication playing an increasingly visible role in American politics, respondents report the highest level of agreement thus far in the Digital Future Study that the Internet has become important for political campaigns.

Among respondents age 16 and older in the current Digital Future Study, 69 percent agree or strongly agree that the Internet has become important for political campaigns, up from 60 percent in 2008 and higher than the previous peak of 62 percent in 2005.

The percentage of respondents age 16 and older who disagree that the Internet is important in political campaigns declined to 13 percent of all respondents, a new low for the study.

The Internet Has Become Important for the Political Campaign Process
(Percentage of Respondents Age 16 and Older)



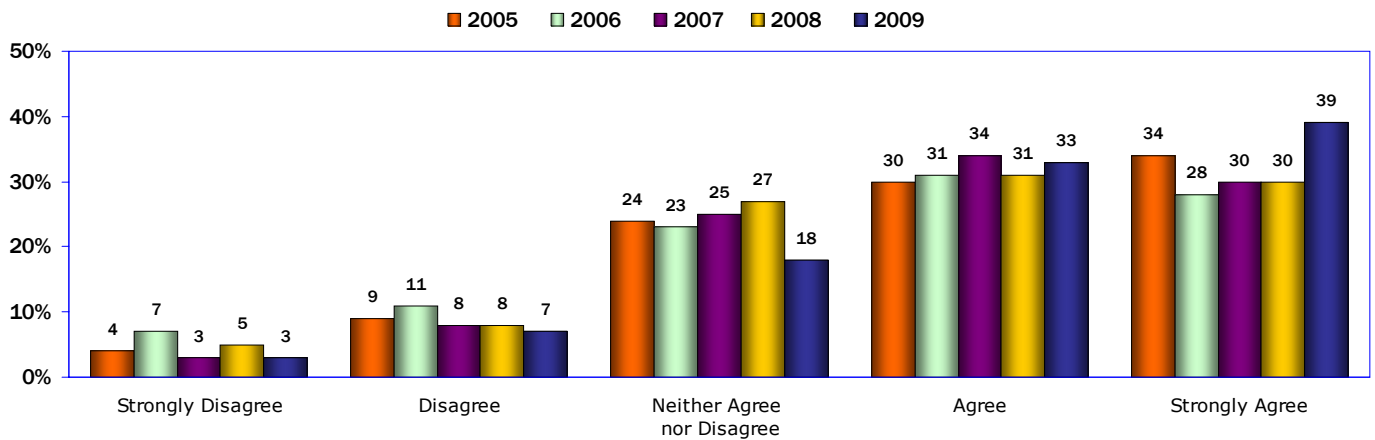
(Q190e M-1 2010) (Note: 2008 data was gathered before the Presidential election)

164. The Internet's Importance in Political Campaigns: Internet Users

Users age 16 and older report a high level of agreement that the Internet is important in political campaigns.

Seventy-two percent of users age 16 and older agree or strongly agree that the Internet has become important for political campaigns – up from 61 percent in 2008, and the highest percentage thus far in the Digital Future Project.

**The Internet Has Become Important for the Political Campaign Process
(Percentage of Internet Users Age 16 and Older)**



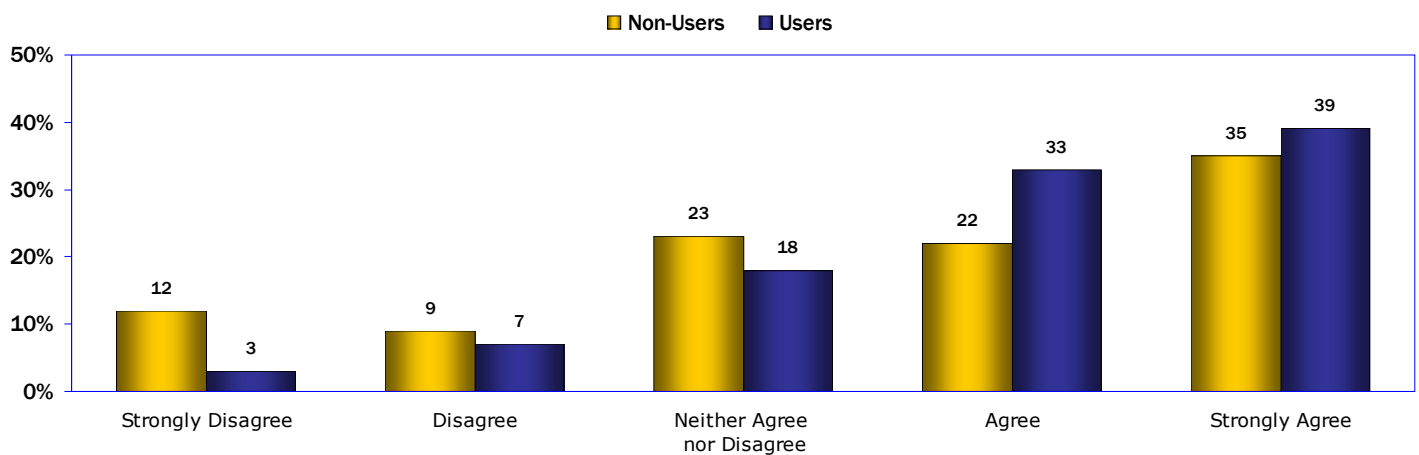
(Q190e M-3 2010)

165. The Internet's Importance in Political Campaigns: Internet Users vs. Non-Users

Comparing Internet users and non-users age 16 and older shows a significant difference in views. Seventy-two percent of users agreed or strongly agreed that the Internet has become important for political campaigns, compared with 57 percent of non-users who expressed the same view.

Conversely, 21 percent of non-users age 16 and older disagreed or strongly disagreed that the Internet is important in political campaigns, compared to 10 percent of users age 16 and older.

The Internet Has Become Important for the Political Campaign Process
(Percentage of Internet users vs. Non-users Age 16 and Older)



(Q190e M-3 2010)

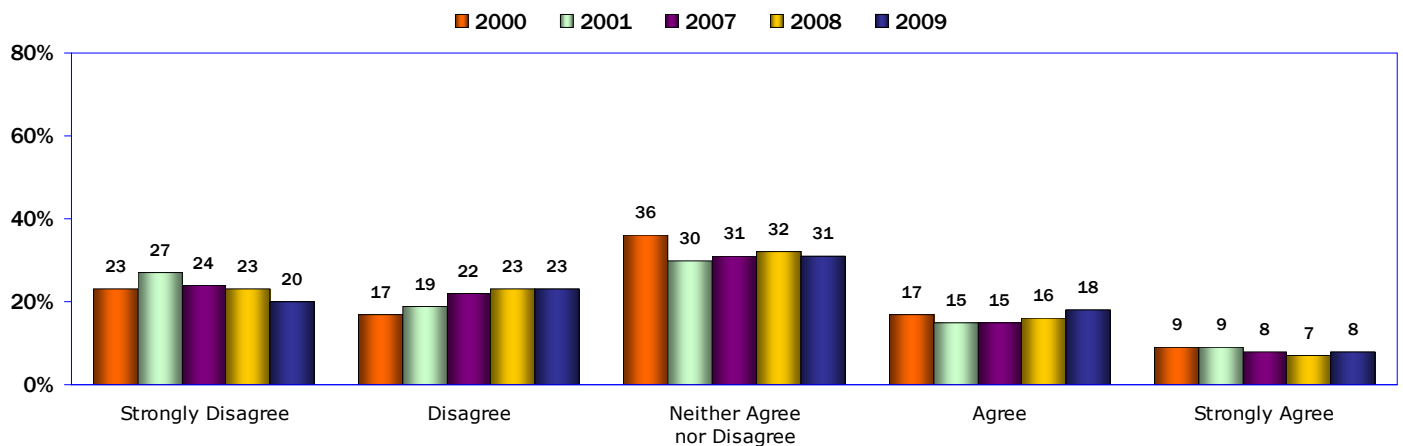
166. Is the Internet a Tool for Political Influence?

Even though large percentages of respondents age 16 and older believe that the Internet is important in political campaigns (see the previous two pages), much smaller percentages of Americans believe that by using the Internet, public officials will care more about what people like them think.

Among respondents age 16 and older, 26 percent of respondents said that by using the Internet public officials will care more about what people like them think, up slightly from 23 percent reported in 2008 and 2007.

A slightly lower percentage of respondents age 16 and older in the current study disagree that the Internet is a tool for political influence. Forty-three percent of respondents disagreed with the statement, down from 46 percent in 2008 and 2007.

**By Using the Internet Public Officials Will Care More about What People Like Them Think
(Percentage of Respondents Age 16 and Older)**

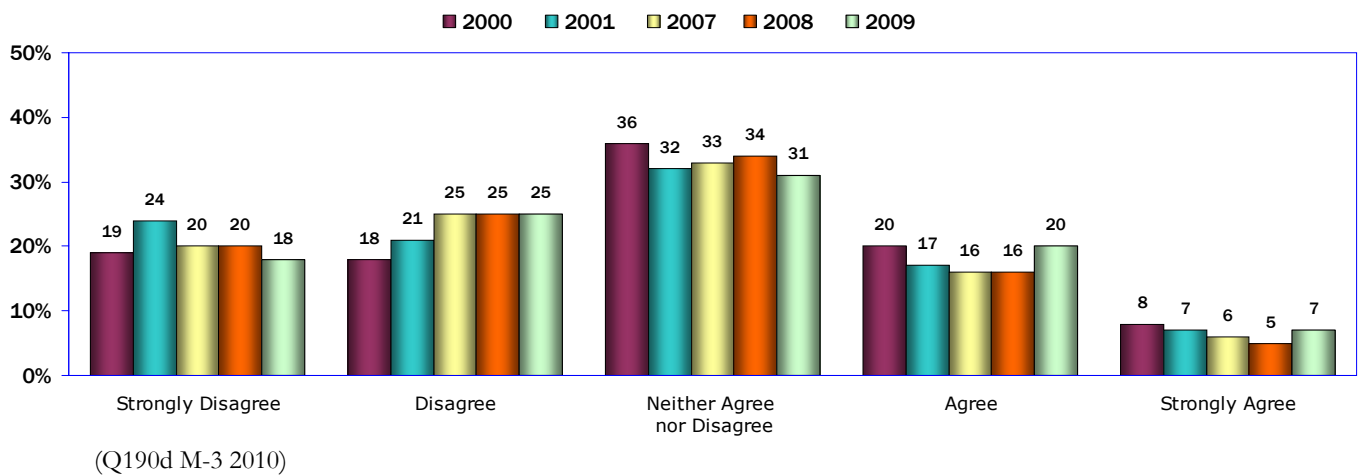


(Q190d M-1 2010)

167. The Internet as a Tool for Political Influence: Internet Users

Among Internet users age 16 and older, 27 percent agreed that the Internet can make public officials care more about what people like them think, up from 21 percent in 2008.

**By Using the Internet Public Officials Will Care More about What People Like Them Think
(Percentage of Internet Users Age 16 and Older)**

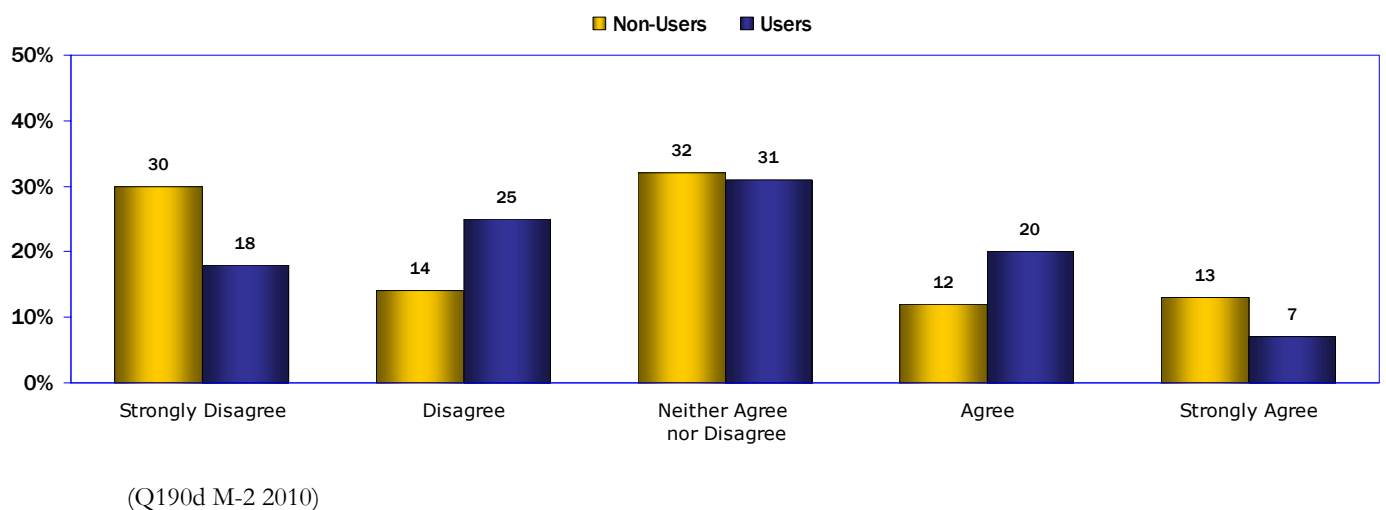


168. The Internet As A Tool For Political Influence: Internet Non-Users Vs. Users

Internet users and non-users age 16 and older express similar low levels of agreement about if the Internet will cause public officials to care more about what people like them think.

Twenty-seven percent of users and 25 percent of non-users said that by using the Internet, public officials will care more about what people think. However, 43 percent of users and 44 percent of non-users do not agree that public officials will care more about what people think by using the Internet.

**By Using the Internet Public Officials Will Care More about What People Like Them Think
(Internet Non-Users Vs. Users Age 16 and Older)**

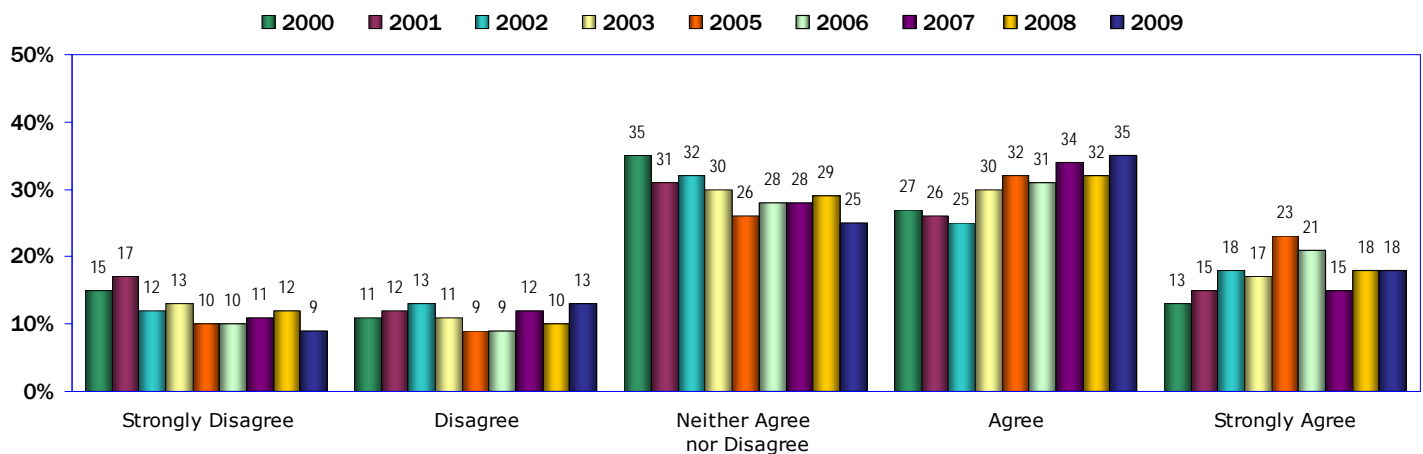


169. The Internet: a Tool for Understanding Politics

While low percentages of respondents age 16 and older believe that the Internet is a tool for public influence (see previous page), a large and growing percentage said that going online can help people better understand politics.

In the current Digital Future Project, 53 percent of respondents age 16 and older agree or strongly agree that the Internet allows people to better understand politics, up from 50 percent in 2008.

Using The Internet Allows People to Better Understand Politics
(Percentage of Respondents Age 16 and Older)

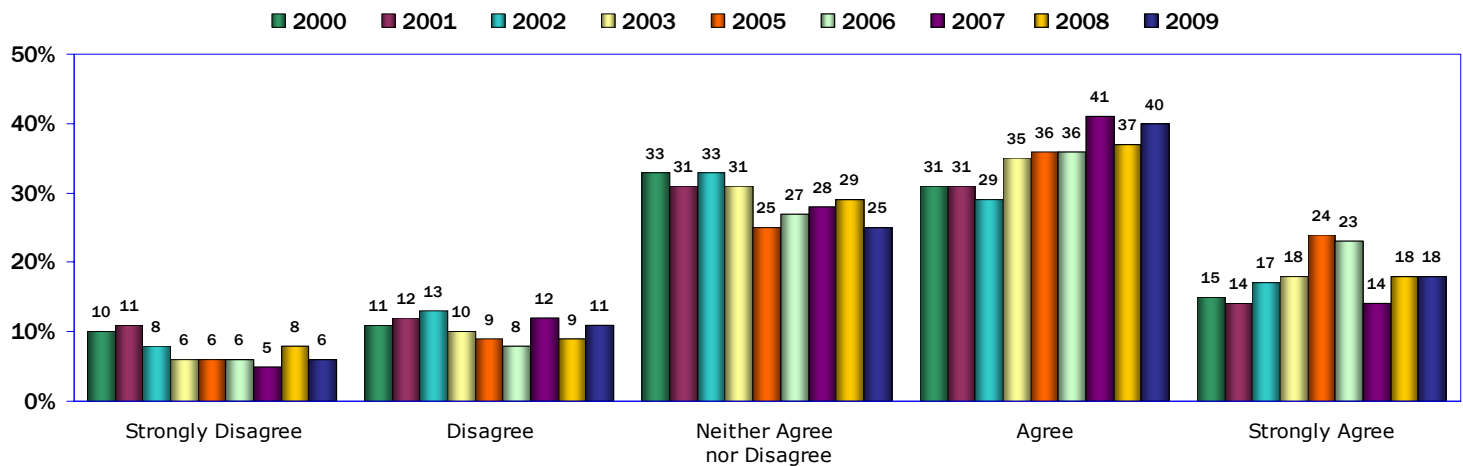


(Q190c M-1 2010)

170. The Internet: A Tool for Understanding Politics (Internet Users)

Among users age 16 and older, 58 percent agree or strongly agree that going online can help people better understand politics, up from 55 percent in 2008 but below the peak level of 60 percent in 2005.

By Using The Internet, People Like You Can Better Understand Politics
(Percentage of Internet Users Age 16 and Older)



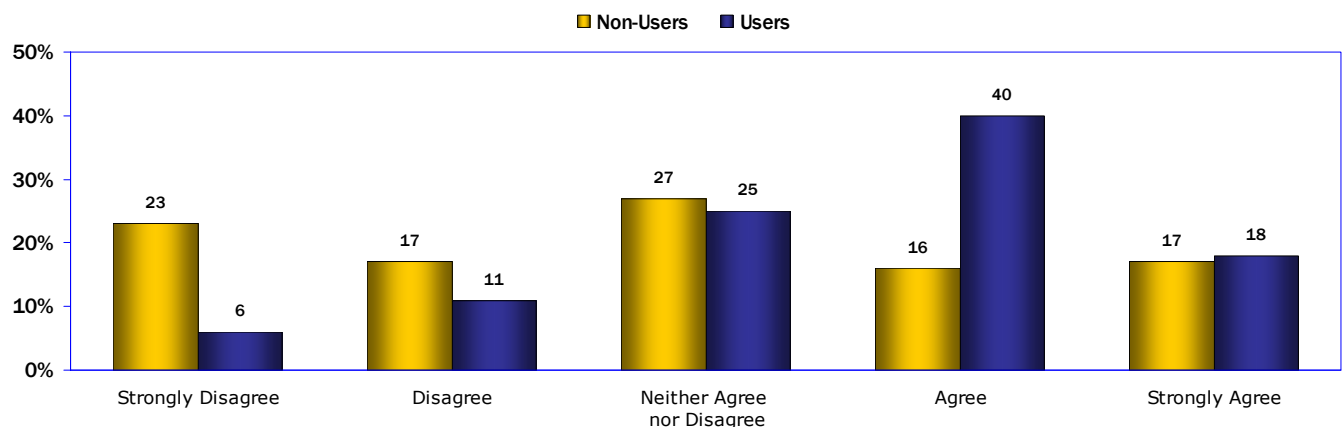
(Q190c M-3 2010)

171. The Internet: A Tool for Understanding Politics (Internet Non-Users Vs. Users)

Internet users age 16 and older report a much higher percentage of agreement that using the Internet allows people to better understand politics.

Fifty-eight percent of users age 16 and older in the current study said that using the Internet allows people to better understand politics, compared to 33 percent of non-users. Conversely, 40 percent of non-users age 16 and older disagree or strongly disagree with this statement, compared to 17 percent of users.

Using The Internet Allows People To Better Understand Politics
(Internet Non-Users vs. Users Age 16 and Older)



(Q190c M-2 2010)

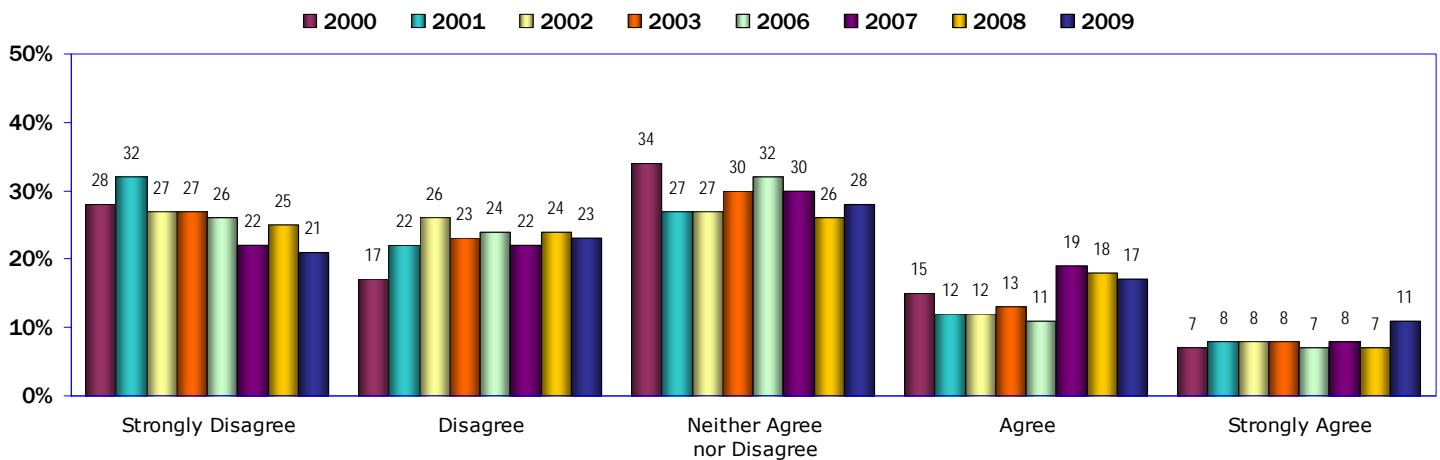
I72. Does the Internet Give People More Say in what the Government Does?

Only modest percentages of respondents age 16 and older believe that the Internet gives people more say in what the government does.

Twenty-eight percent of respondents age 16 and older in the current study said the Internet gives people more say in what the government does, compared to 25 percent in 2008 and 27 percent in 2007.

Forty-four percent of respondents age 16 and older disagreed or strongly disagreed that the Internet gives people more say in the government, a decline from 49 percent report in 2008 and the same as in 2007.

By Using the Internet, People Like You Can Have More Say in What the Government Does
(Percentage of Respondents Age 16 and Older)



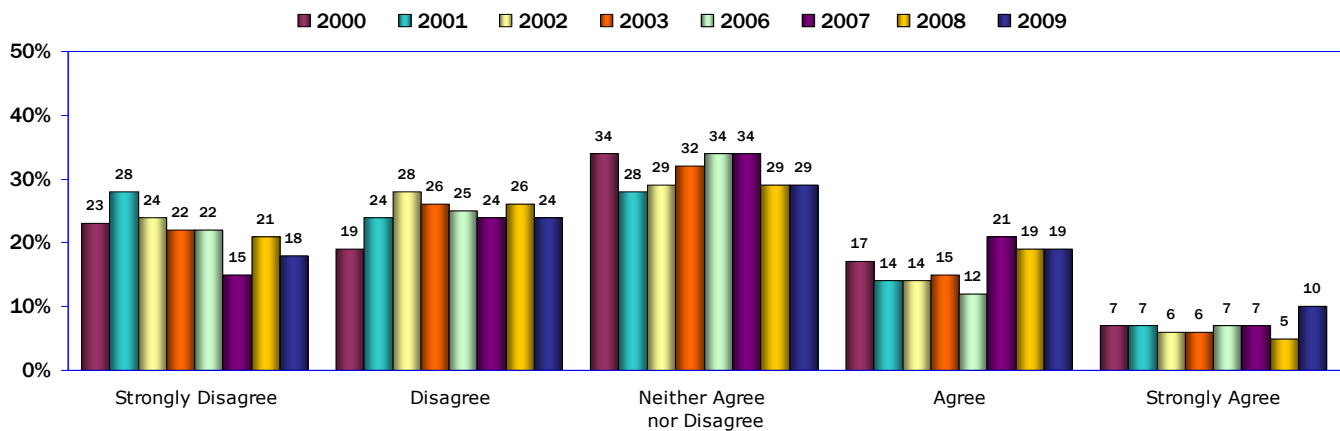
(Q190b M-1 2010)

173. Does the Internet Give People More Say In What The Government Does? (Internet Users)

Among users age 16 and older, 29 percent agreed or strongly agreed that using the Internet can give people more say in what the government does, up from 24 percent in 2008.

Forty-two percent of users age 16 and older disagreed or strongly disagreed that the Internet can give people more say in government, down from 47 percent reported in 2008.

**By Using The Internet, People Like You Can Have More Say in What the Government Does
(Percentage of Internet Users Age 16 and Older)**

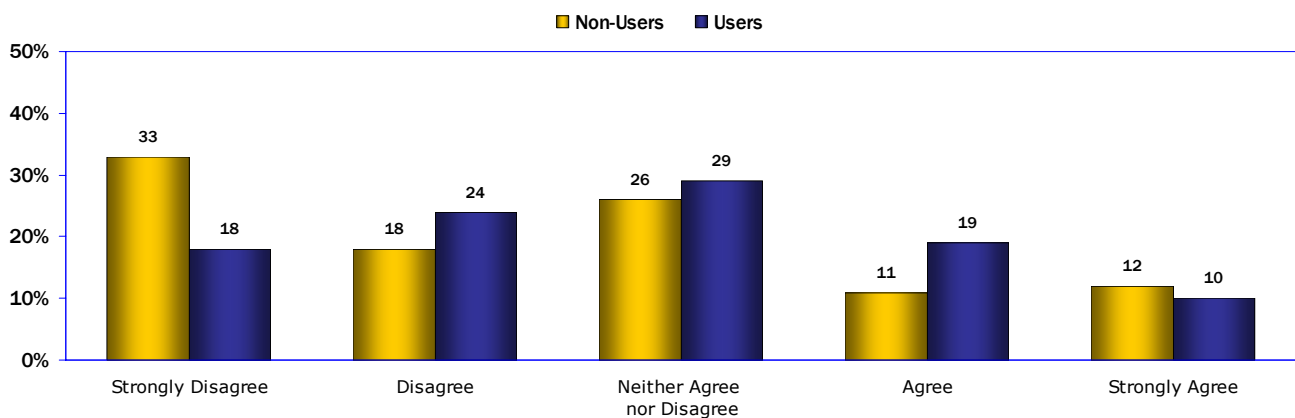


(Q190b M-3 2010)

174. Does the Internet Give People More Say In What The Government Does? Internet Users Vs. Non-Users

When asked if using the Internet gives people more of a say in what government does, 29 percent of users and 23 percent of non-users age 16 and older agreed or strongly agreed. Much higher percentages of users (42 percent) than non-users (51 percent) age 16 and older disagreed or strongly disagreed with this statement.

**By Using the Internet, People Like You Can Have More Say in What the Government Does
(Percentage of Internet Non-Users Vs. Users Age 16 and Older)**

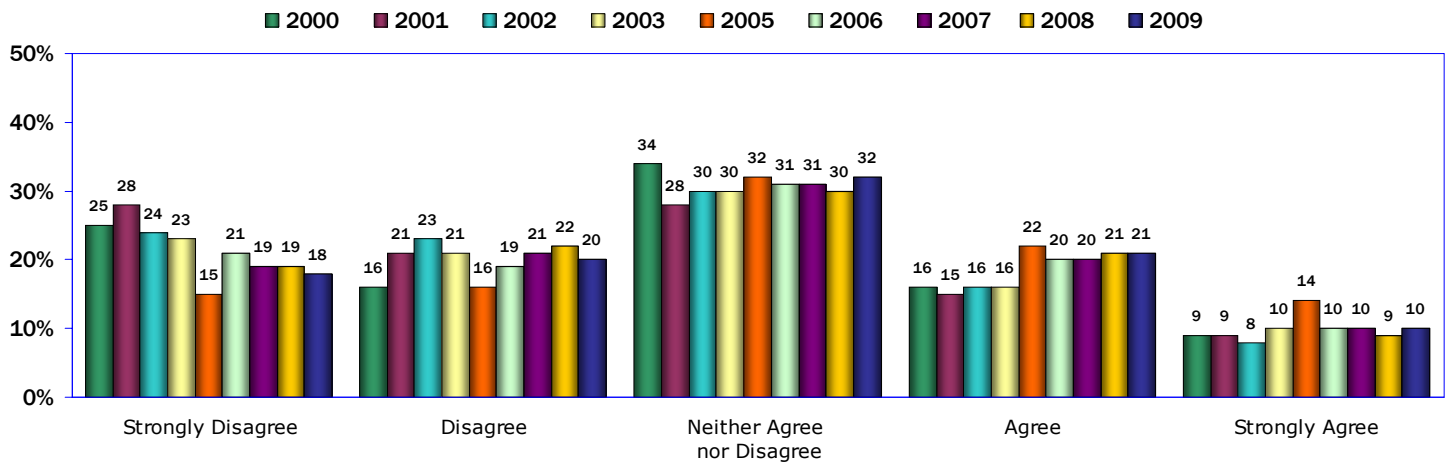


(Q190b M-2 2010)

I75. The Internet as a Tool to Help Gain Political Power

Thirty-one percent of respondents age 16 and older agree or strongly agree that by using the Internet, people like them can have more political power, a marginal increase over 2008. And a smaller percent in the current study disagreed with this statement – 38 percent of respondents age 16 and older in the current study, compared to 41 percent in 2008.

By Using the Internet People Like You Can Have More Political Power
(Percentage of Respondents Age 16 and Older)

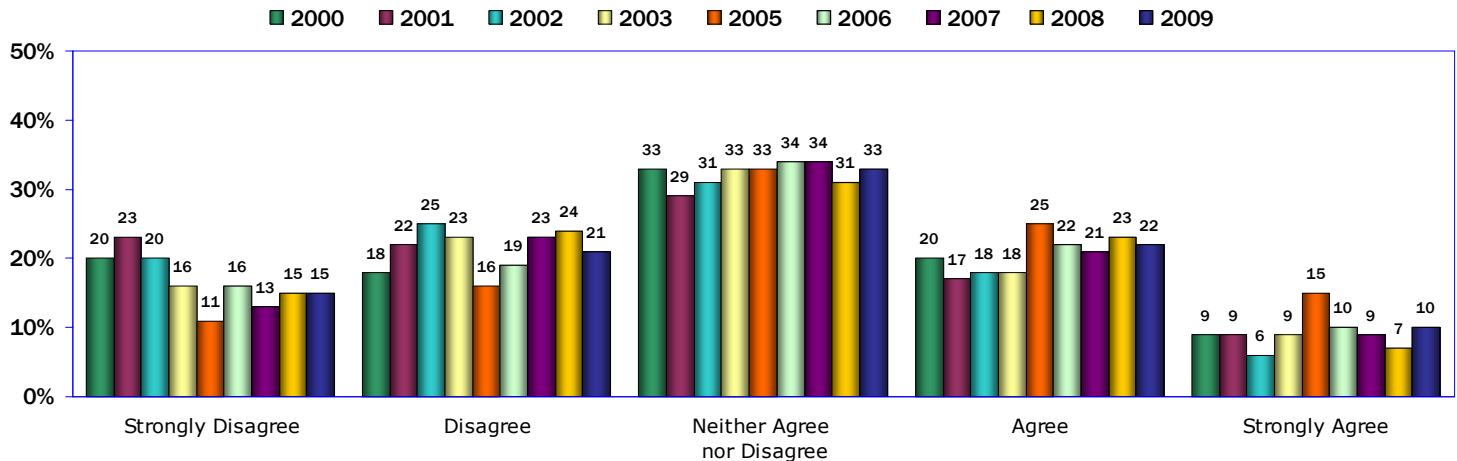


(Q190a M-1 2010)

I76. The Internet as a Tool to Help Gain Political Power (Internet Users)

Although 32 percent of Internet users age 16 and older agree or strongly agree that by using the Internet, people like them can have more political power, an even larger percentage (36 percent) disagree with that statement.

**By Using the Internet People Like You Can Have More Political Power
(Percentage of Internet Users Age 16 and Older)**

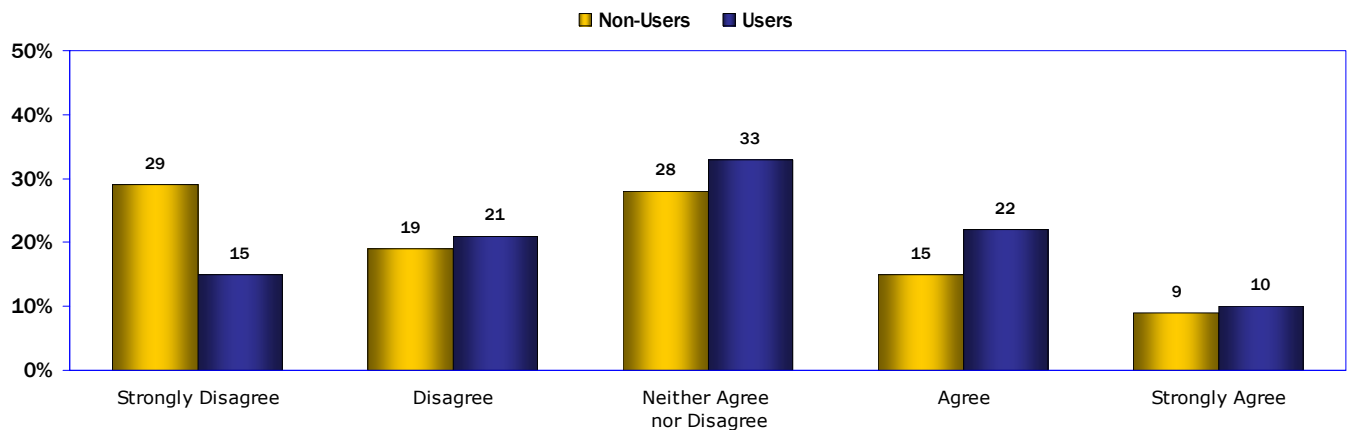


(Q190a M-3 2010)

I77. The Internet as a Tool to Help Gain Political Power: Internet Non-Users Vs. Users

Among Internet users age 16 and older, 32 percent agreed or strongly agreed that the Internet can give people like them more political power, compared to 24 percent of non-users age 16 and older.

**By Using the Internet People Like You Can Have More Political Power
(Percentage of Internet Non-Users Vs. Users Age 16 and Older)**

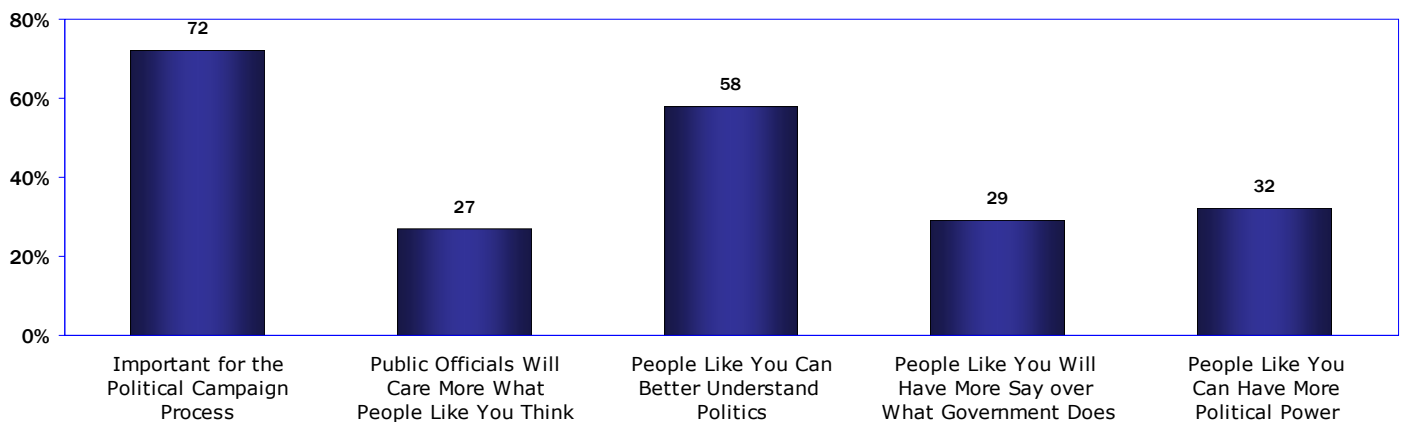


(Q190a M-2 2010)

178. At a Glance: Views about the Internet and Politics

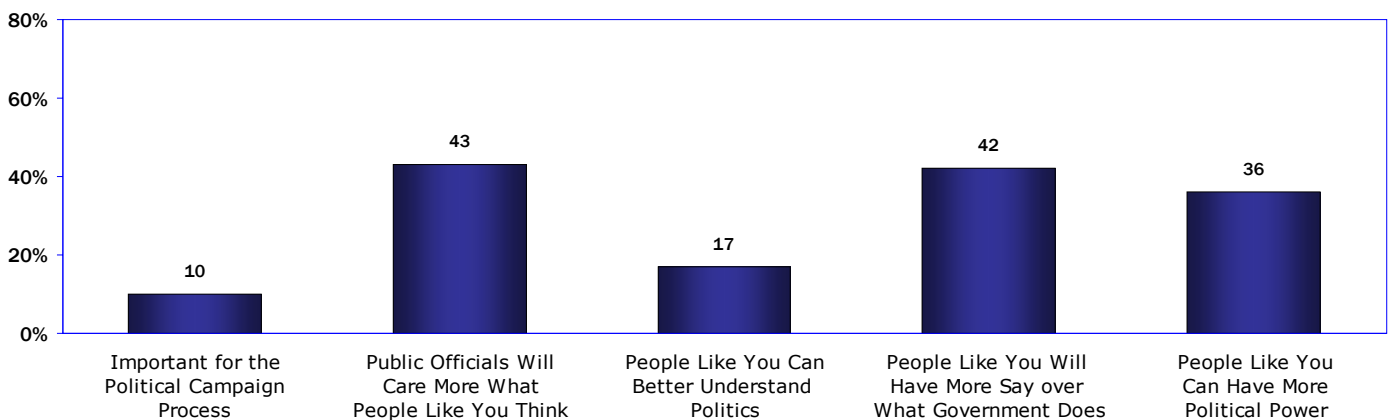
Overall, in the wake of the 2008 presidential campaign, a very large percentage of Internet users in the current Digital Future study said that the Internet is important for political campaigns, and increasing knowledge about politics. In spite of those benefits, much smaller percentages of users continue to say that the Internet influences politicians to care more about their constituencies, or it will help people gain more political power or have a say in government.

Views about the Internet and Politics
(Percentage of Internet Users who Responded "Agree" or "Strongly Agree")



(Q190 combined agree)

Views about the Internet and Politics
(Percentage of Internet Users who Responded "Disagree" or "Strongly Disagree")



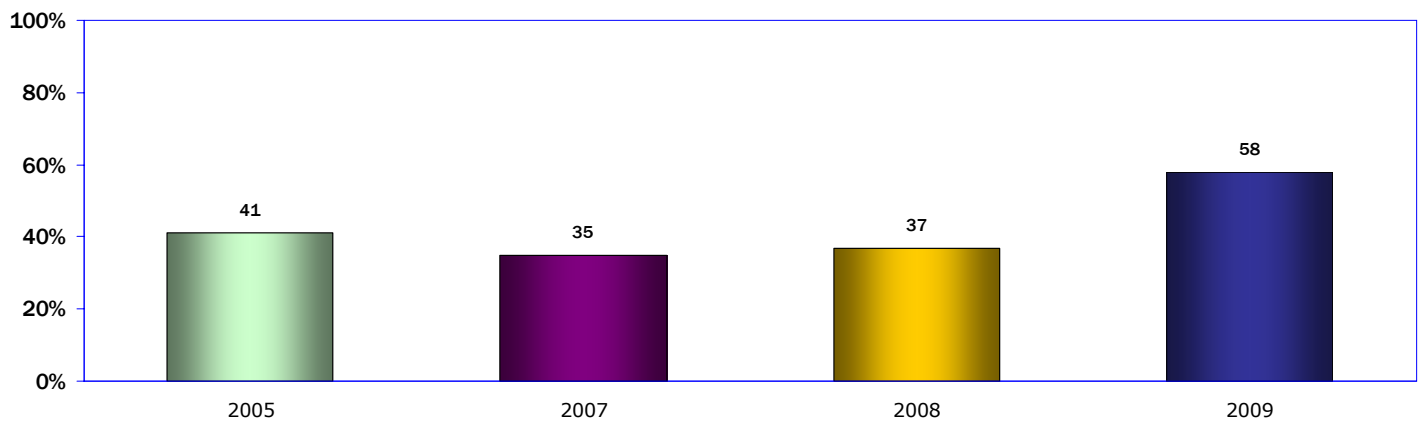
(Q190 combined disagree)

Elections and Online Information

I79. The Internet and Information-Gathering during Election Campaigns

The percentage of adult Internet users who went online to gather information during the presidential election increased significantly in the current Digital Future Study, growing to 58 percent of users, up from 37 percent in 2008.

**Did You Use the Internet to Gather Information
during the Last Significant Election in Your Area?
(Percentage of Adult Internet Users)**



(Q297A M-1 2010)

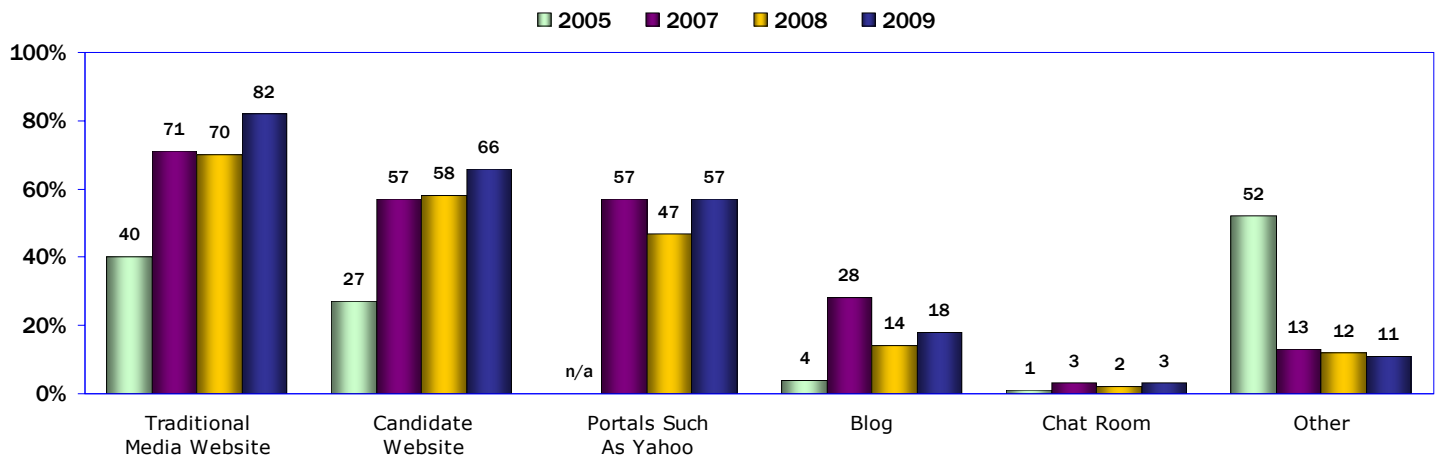
180. Where Do You Get Election-Related Information?

Increasing percentages of adult Internet users in the current Digital Future Project accessed the four principal online sources to find information about candidates: traditional media Web sites, candidates' Web sites, Web portals such as Yahoo, and (to a much lesser extent) blogs.

The primary sources of election-related information in the current study are traditional media Web sites, such as nytimes.com, which were accessed by 82 percent of users who gather campaign information online – an increase over the 70 percent over 2008.

Access of information on candidates' Web sites increased to 66 percent of those who go online to gather campaign information -- up from 58 percent in 2008 – while 57 percent said they found campaign information on Internet portals. Eighteen percent sought campaign information on blogs, up slightly from 14 percent in 2008.

Location of Election-Related Information Found by Internet Users
(Percentage of Adult Internet Users Who Gather Campaign Information Online)

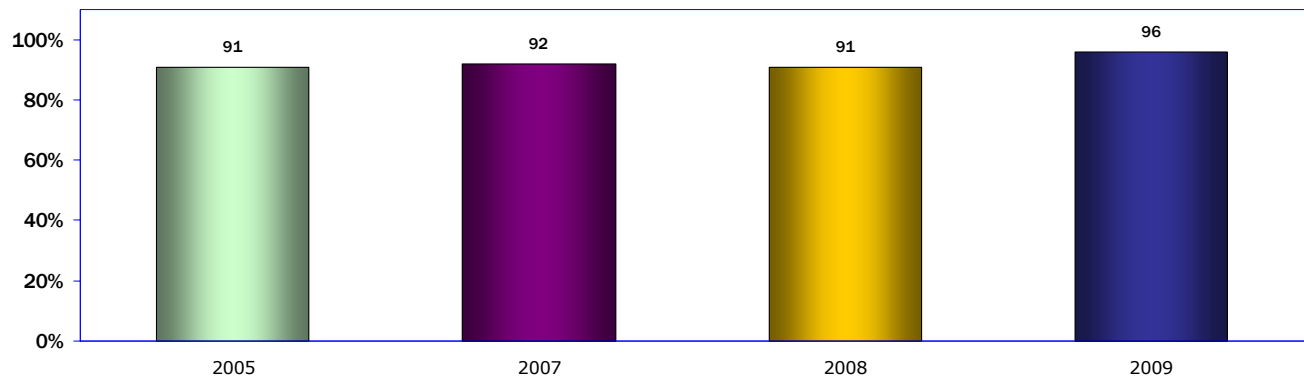


(Q297 M-5 2010) (Multiple responses possible)

181. The Internet and Gathering Information about Candidates and Issues

Almost all adult Internet users who go online for information-gathering during an election said they sought information about issues or candidates they supported (96 percent) – an increase over the already-high figures reported in the three previous studies.

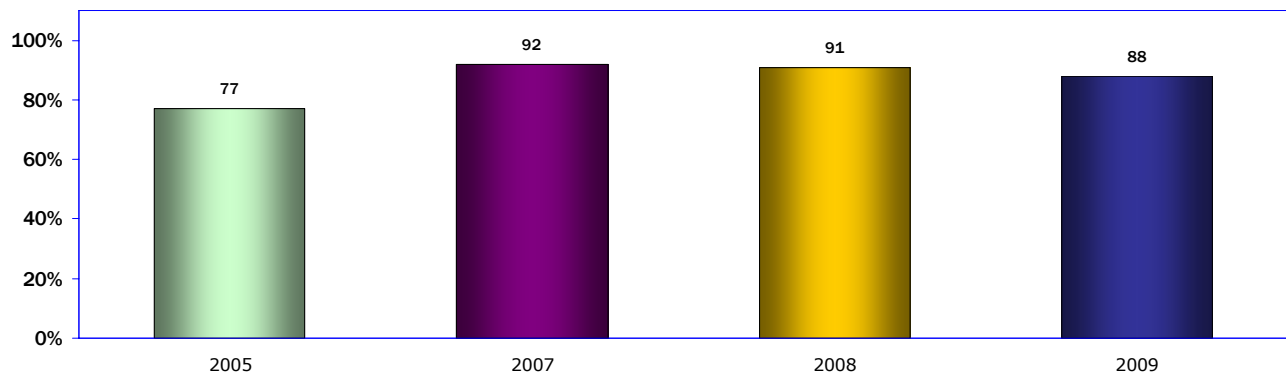
**When You Used the Internet to Gather Information
During the Last Significant Election in Your Area,
Did You Seek Information about Issues or Candidates You Supported?
(Percentage of Adult Internet Users Who Gather Campaign Information Online)**



(Q297 M-2 2010)

In the current study, a slightly lower – but still high -- percentage of the adult users who gather campaign information online sought information on issues or candidates about which they were undecided.

**When You Used the Internet to Gather Information
During the Last Significant Election in Your Area,
Did You Seek Information about Issues or Candidates About Which You Were Undecided?
(Percentage of Adult Internet Users Who Gather Campaign Information Online)**



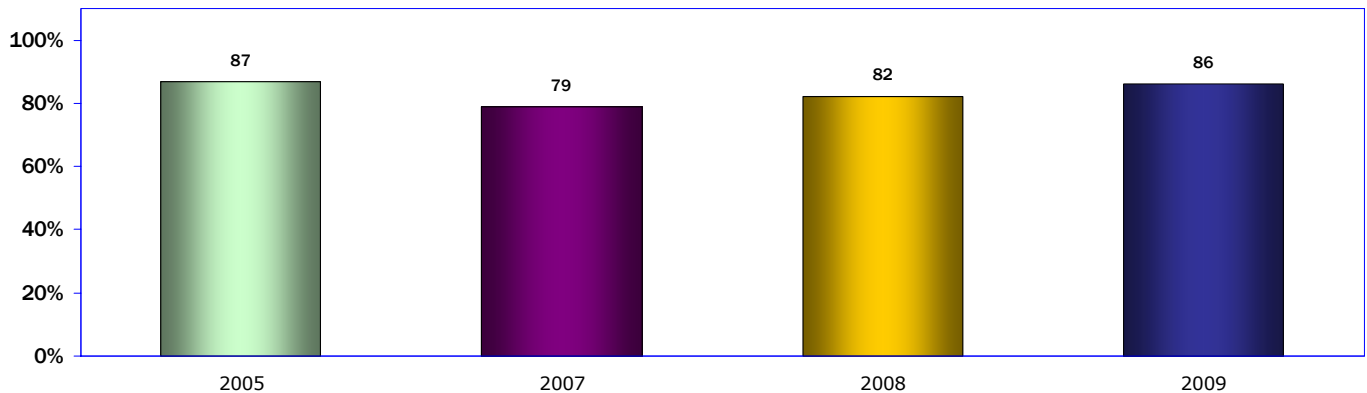
(Q297 M-3 2010)

I82. Election Information Online: Satisfaction Levels

A large and growing percentage of adult Internet users who go online for election information were satisfied with what they found.

Eighty-six percent of adult users who went online for election information said they were satisfied with the information they found – an increase over the 82 percent reported in 2008.

Were You Satisfied with the Election Information You Found on the Internet ?
(Percentage of Adult Internet Users Who Gather Campaign Information Online, Responding Yes)

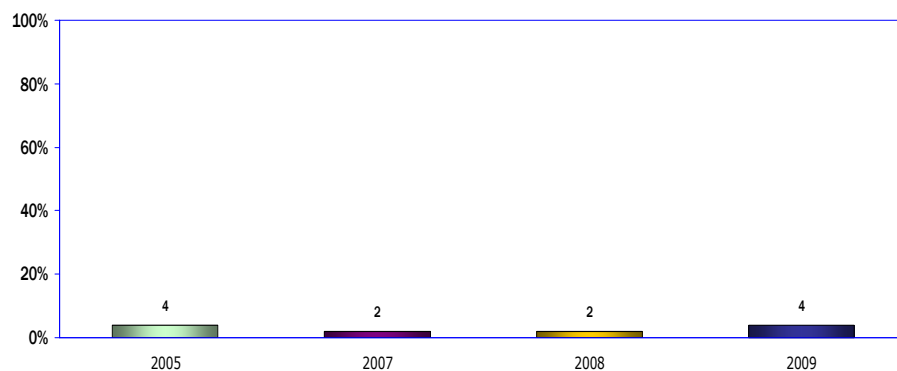


(Q297 M-4 2010)

I83. Volunteering Online for Political Campaign Work

A small but growing percentage of adult Internet users said they volunteered over the Internet to work for a political candidate – four percent in the current study, up from two percent in 2008.

Did You Volunteer over the Internet to Work for a Candidate?
(Percentage of Adult Internet Users)



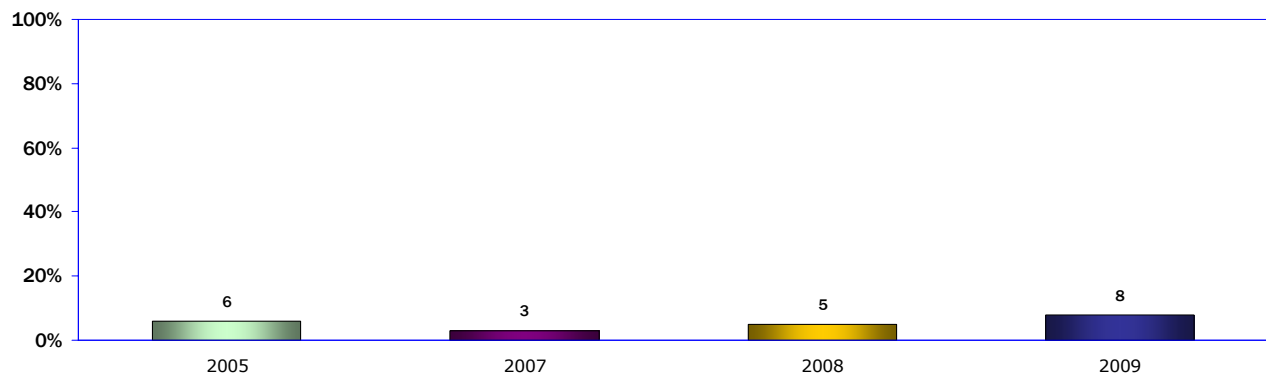
(Q297 M-7 2010)

I84. Campaign Contributions Online

With online solicitation of campaign contributions at unprecedented levels, eight percent of adult Internet users said they contributed money to a candidate through the Internet -- an increase from five percent in 2008.

As a percentage of voters, this number continues to be relatively low. Nevertheless, the percentage translates into more than 18 million adult Americans – a number that represents a tremendously important and growing source of revenue for the political process.

Did you contribute money to a candidate through the Internet?
(Percentage of Adult Internet Users)



(Q297 M-6 2010)

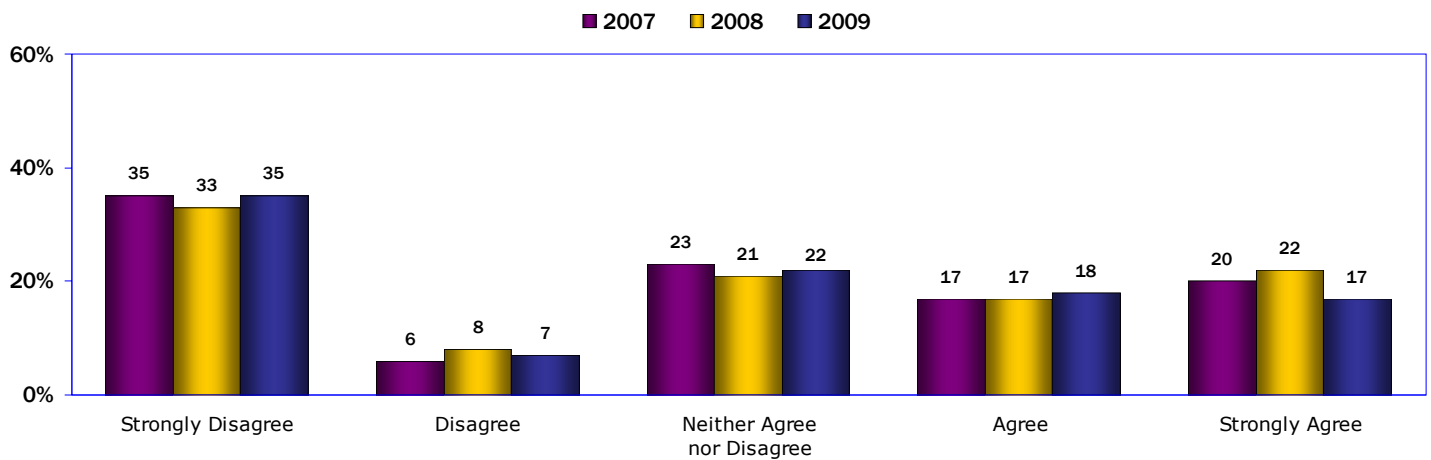
I85. Voting Online

Even though the most recent presidential election featured vast Internet outreach by candidates and connection to voters, a declining percentage of respondents age 16 and older want to expand their online experience to include voting.

For the second year in a row, the percentage of respondents age 16 and older who agree or strongly agree that they would be interested in voting online has declined – to 35 percent in the current study, down from 39 percent in 2008 and 37 percent in 2007.

Forty-two percent of users disagreed or strongly disagreed with voting online, up marginally from 41 percent in 2008.

I Would Be Interested in Voting Online
(Percentage of Respondents Age 16 and Older)



(Q533 M-1 2010)

The 2010 Digital Future Project: Trends and Issues

A Decade of Exploring the Digital Realm

After 10 years of studying the views and behavior of Internet users and non-users, perhaps the most intriguing finding is that tremendous changes continue to emerge. Here are several issues about America on the Internet that underscore the benefits -- as well as the drawbacks -- of going online:

Internet Access and Age

It would shock no one to learn that the younger the respondents, the more likely they are to be Internet users. One hundred percent of respondents age 24 and under in the current study go online.

What *is* surprising is that significant percentages of users in age ranges only modestly older are not Internet users. Among respondents age 46 to 55, 19 percent are non-users; among those 36 to 45, 15 percent are non-users -- remarkable percentages given that both groups of respondents would have been exposed to online technology for at least 15 years.

Also worth noting is the limited growth in Internet use among users age 66 or older. Although 41 percent of respondents age 66 or older now go online, compared to only 29 percent in 2000, in the last five years the growth in Internet use has been essentially flat. Ideally, the United States will not have a permanent subclass of older non-users; tracking Internet access in an aging population will be a key issue as the studies continue.

Is Income a Factor in Online Use?

Even though the expense of using the Internet is cited by only 11 percent of non-users as a reason for not going online, (*See page 62*), the Digital Future Studies continue to find that Internet use has a strong relationship with income.

In households with income of \$100,000 or more, virtually all respondents (97 percent) use the Internet. Conversely, in households with income of less than \$30,000 a year, 63 percent of respondents are Internet users. While that figure represents progress -- in 2000, only 51 percent of the lowest-income households went online -- the much smaller percentage of users among the lowest-income households vividly illustrates that the relationship between income and Internet use is a social trend that continues to merit exploration.

Hours per Week Online Continues to Grow

Hours online reported by users have increased in each Digital Future Study – now an average of 19 hours per week; in 2000, average online use was 9.4 hours per week. And online access at home also continues to increase – now 10.6 hours per week. In 2000, users averaged 3.3 hours of online time at home.

Of particular note is the change in online hours during the most recent years of the study: even though Internet use has been well-established for more than a decade, the growth in online hours has been the largest in the two most recent years of the Digital Future Projects.

With total online access now averaging more than 2.7 hours per day, Internet use consumes an impressively large percentage of waking hours; how time online evolves is an issue that merits continuing observation.

Personal Postings: Are Personal Web Sites Becoming Obsolete?

Beginning in 2003, the Digital Future Study has explored how users post personal information online. Since then, the percentage of users who keep a personal blog has grown by ten-fold, those who display photos online has increased five-fold, but those who maintain their own Web site has remained generally stable for four years. (*See page 100*)

Has the simplicity of creating and maintaining blogs changed how users view their posting of information online? Will creation of personal Web sites decrease?

Newspapers: The Decline Continues

The death watch has begun for American daily print newspapers.

Perhaps the most vivid evidence of the changing nature of media is the continuing demise of the traditional printed newspaper in the United States. Conduct a Web search for “newspapers” and “circulation,” and the news is all bad; readership of print newspapers plummets while the financial woes of newspaper organizations continue to grow.

The New York Times reported in October 2009, “The two-decade erosion in newspaper circulation is looking more like an avalanche. . .with weekday sales down more than 10 percent since last year, depressed by rising Internet readership, price increases, the recession and papers intentionally shedding unprofitable circulation.”

But the Digital Future Project identified an even more vivid commentary that explains the fate of the newspaper: Americans’ views about their value as sources of information or entertainment. As sources of information – their primary function – newspapers rank *last* in importance among principal media: in the current study, only 56 percent of Internet users ranked newspapers as important or very important sources of information for them – a decrease from 60 percent in 2008 and below the Internet (78 percent), and television (68 percent). (*See page 67*)

Even lower are percentages of those who consider newspapers important as sources of entertainment for them, now considered important by 29 percent of Internet users, and down from 32 percent in 2008 – also last among principal media. Television was ranked important or very important for entertainment by 79 percent, the Internet by 64 percent, and radio by 59 percent. *(See page 67)*

This downward spiral of newspapers is also validated by another finding in the current Digital Future Study, which shows that 18 percent of Internet users said they stopped a subscription to a newspaper or magazine because they now get the same or related content online – a percentage that was down slightly from 22 percent in 2008, but nevertheless a strong indication that print newspapers can be sacrificed by a significant percentage of Internet users. *(See page 91)* In a related finding, when Internet users were asked where they would go for information provided by their newspaper if the print edition ceased, 59 percent said they would read the online edition of the publication; only 37 percent said they would instead read the print edition of another newspaper. *(See page 92)*

And even though 62 percent of users who read newspapers said they would miss the print edition of their newspaper -- an increase for the second year in a row -- 22 percent of users who read newspapers said they would not miss the print edition of their newspaper. *(See page 91)*

The continuing downward spiral in newspaper circulation may be further affected by advances during the past year in the online delivery of newspapers to e-readers such as the Amazon Kindle and Sony Reader, as well as software that more seamlessly transfers traditional newspaper content to other types of handheld electronic devices that Americans already possess, such as various types of Blackberry, iPod, and iTouch. After years of aborted attempts, these advances finally appear to be practical and affordable methods of providing electronic newspapers to readers. If so, what will that mean for the future of the traditional print newspaper?

Internet Use with a Wired PC away from Home or Work: Where are Users Going Online?

With so much media attention focused on the growth of Internet access and e-communications through handheld wireless devices, an issue not often explored is the impressive growth in time spent online through wired computers, but *not* at home, work or school – time which has more than doubled for both light and heavy users in only two years.

Among heavy users, time spent online through wired computers away from home, work or school has increased from 27 minutes a week in 2007 to almost an hour in the current study (56 minutes). Even light users report that they regularly use wired PCs on a weekly basis at locations other than home, work or school – now 12 minutes a week, up from five minutes in 2007. *(See page 43)*

The Internet and Political Behavior

The 2008 Presidential campaign included unprecedented levels of online communication by candidates – making statements, providing platform information, and soliciting for contributions. Yet even with these new levels of online political communication, the views of Internet users about politics online have changed little over a decade: although more than 70 percent of users agree that the Internet is important for political campaigns, much smaller percentages say that the Internet influences politicians to care more about their constituencies, or it will help people gain more political power or have a say in government. (*see pages 174*).

This does not mean that the Internet is not having an impact on political behavior. Fifty-eight percent of users went online to gather information during the presidential election, an increase from 41 percent only four years ago. And a large and growing percentage of users said they were satisfied with the election information they found online (*see page 190*). A small but increasing percentage of Internet users said they volunteered over the Internet to work for a political candidate – four percent in the current study, up from two percent in 2008. And with online solicitation of campaign contributions at new heights, eight percent of adult Internet users said they contributed money to a candidate through the Internet -- an increase from five percent in 2008 (*see page 191*).

These percentages are important because they represent major steps forward in the role of the Internet in the U.S. political process – a role that could create unprecedented opportunities for involvement in political communication and action for millions of Americans. Ideally, these percentages represent the early steps in changes that online technology will bring to political behavior, increasing the impact of the Internet on political power and Americans' say in their government.

Where is the Trust?

And finally – although going online is unquestionably a vital tool for communication, entertainment, and purchasing, and Internet use is at its highest level thus far, several issues nevertheless make us ask: why is such an important technological tool considered unreliable or mistrusted by significant percentages of its users?

Consider these findings from the current Digital Future Project:

- For the third year in a row, a declining percentage of Internet users – now 39 percent -- said that most or all of the information online is reliable, representing the lowest level thus far in the Digital Future Project.
- Even more disturbing is the 16 percent of Internet users who said that only a small portion or none of the information online is reliable – a percentage that has grown for the past three years and is now at the highest level thus far in the Digital Future Project. (*See page 70*)

- Also revealing is the percentage of users who have limited trust even in the sites they visit regularly: although 78 percent said that most or all of the information on the Web sites they visit regularly is reliable (a decline from the previous two years), 22 percent of users say that only one half or less of information on sites they visit regularly is reliable. For one-fifth of users to say that a majority of information on sites they visit regularly is not reliable or accurate speaks volumes about the faith of many users in the reliability of online content. *(See page 73)*
- Even search engines such as Google and Yahoo – traditional stalwarts of online credibility – have lost some of their luster. While 53 percent of Internet users said that most or all of the information provided by search engines is reliable and accurate, that percentage declined slightly in the current Digital Future Study and is well below the peak of 64 percent in 2006. At the same time, 36 percent of users said only about half of information provided by search engines is reliable and accurate, and 12 percent said only a small portion or none of it was reliable. *(See page 82)*
- Only 42 percent of users said they have some trust or a lot of trust in the Internet in general. Nine percent of users have no trust in the Internet. *(See page 84)*
- Reinforcing other findings about personal privacy concerns when or if buying online, only eight percent of users said they would be willing to reveal personal information online in exchange for extra services and content. *(See page 112)*

These issues focus primarily on the views of users about trust in online information, perceptions of reliability, and concerns about security. But we also have to consider if these responses represent the tip of an iceberg that includes deeper concerns among users about the role of online technology in their lives.

Internet users deal with an unprecedented level of online connections and communication beyond basic e-mail that did not exist a decade ago: social networking sites, online video, PDAs, texting, IM, e-readers, portable video devices, and most recently the iPad and competing devices to come. Through this technology, users must rely on the Internet more than ever before, yet at the same time this survey is identifying growing concern about reliability of the technology and user trust in it. Have we reached the point at which users are going into “online overload?”

* * * * *

Supplement I

The USC Annenberg School Center for the Digital Future

The USC Annenberg School Center for the Digital Future is a forum for the discussion and development of policy alternatives addressing the leading issues in media and communication. Communication policy at its core begins with the individual and the family.

The Center conducts and facilitates research, courses, seminars, working groups, and conferences designed to have a major impact on policy at the local, national, and international levels. It also provides a base for visiting scholars who are engaged in efforts to examine and shape communication policy. The Center's goals include using the vast intellectual resources of USC to deal with some of the most important concerns of the day and to have a transforming effect on the issues.

The Center is based in the Annenberg School for Communication & Journalism at the University of Southern California. Until July 2004, it was housed at UCLA in the Anderson Graduate School of Management.

In October 2000, the Center released its first report on the Internet, the beginning of an international, long-term exploration of the impact of the Internet on society. This work is part of the World Internet Project, which is organized and coordinated by the Center; included in the World Internet Project are the Center's work and partner studies in countries in North America, Europe, South America, Asia, the Middle East, and Australasia. The first comparative results from the World Internet Project were released in January 2004. The first comprehensive International Report of the World Internet Project was released at the end of 2008, and the second in 2010.

Since the Center's creation in September 1993, it has been awarded a multi-million-dollar national research grant, held numerous national and local conferences, conducted three nationwide surveys with one of America's leading news magazines, and established a strong national and international identity in communication policy.

The Center for the Digital Future has become an internationally regarded policy studies center. The Center is committed to studying, through a variety of prisms, the important communication issues that transform our lives.

For more information about the Center, visit www.digitalcenter.org.

Supplement 2

The World Internet Project – International Contacts

United States (Organizer)

Center for the Digital Future
USC Annenberg School for Communication & Journalism
www.digitalcenter.org

Argentina

Institute of Applied Economics & Fundación de Investigaciones
Económicas Latinoamericanas
www.fiel.org.ar

Australia

ARC Centre of Excellence for Creative Industries and Innovation (CCi)
Institute for Social Research, Swinburne University of Technology
www.cci.edu.au/projects/digital-futures

Bolivia

Universidad NUR
www.nur.edu

Brazil

Instituto Brasileiro de Economia e Tecnologia
www.braeti.net

Canada

Canada Internet Project (CIP)/Recherche Internet Canada (RIC)
www.cipiconline.ca

Chile

Pontificia Universidad Catolica de Chile: Schools of Communications (head), Sociology, and Engineering/
Santiago Chamber of Commerce (CCS)
www.wipchile.cl

China

Chinese Academy of Social Sciences
www.wipchina.org/en

Colombia

CINTEL -- Centro de Investigación de las Telecomunicaciones
www.cintel.org.co

Cyprus

Cyprus University of Technology
Department of Communication and Internet Studies
www.cut.ac.cy

Czech Republic

Faculty of Social Studies, Masaryk University Brno
www.fss.muni.cz/ivdmr

France

Center for Political Research at Sciences-Po
www.cevipof.msh-paris.fr

Germany

Deutsches Digital Institut
www.deutsches-digital-institut.de

Hungary

ITHAKA -- Information Society and Network Research Center
www.ithaka.hu

Iran

University of Alzahra
www.Alzahra.ac.ir

Israel

The Research Center for Internet Psychology (CIP)
Sammy Ofer School of Communications, The Interdisciplinary Center
www.idc.ac.il/communications/cip/en

Italy

SDA Bocconi, Bocconi University
www.sdabocconi.it/home/it/

Japan

Toyo University
www.soc.toyo.ac.jp/~mikami/wip/en/index.html

Macao

University of Macau, ERS E-Research (Lab)
Macao Internet Project (MIP)
www.macaointernetproject.net

Mexico

Tecnológico de Monterrey, Proyecto Internet
www.wip.mx

New Zealand

Institute of Culture, Discourse and Communication, AUT University of Technology
www.wipnz.aut.ac.nz

Poland

Gazeta.pl Research and Analyses Unit
<http://badania.gazeta.pl>

Portugal

Lisbon Internet and Networks International Research Programme (LINI)
<http://www.lini-research.org>

Russia

Analytical Center, Video International
www.vi.ru/index.aspx?lang=ENG

Singapore

Singapore Internet Research Centre (SiRC)
Nanyang Technological University
www.ntu.edu.sg/sci/sirc

South Korea

Yonsei University
www.yonsei.ac.kr

Spain

Internet Interdisciplinary Institute (IN3)
Open University of Catalonia (UOC)
www.uoc.edu/in3/pic/eng/communication.html

Sweden

World Internet Institute (WII)
www.wii.se

Taiwan

Taiwan e-Governance Research Center
Department of Public Administration, National Chengchi University
www.teg.org.tw
<http://pa.nccu.edu.tw/>

United Arab Emirates

American University of Sharjah, Department of Mass Communication
www.aus.edu

United Kingdom

Oxford Internet Institute
www.oii.ox.ac.uk/microsites/oxis

Supplement 3

Research methods

For both the original sample drawn in 2000, and the replacement samples selected in subsequent years until 2006, a national Random Digit Dial (RDD) telephone sample was used. This method gives every telephone number in the 50 states and the District of Columbia a close to equal chance of being selected.

In the initial call, an interviewer spoke to a person in the household 18 years of age or older to obtain a roster of all household members. At this point, a computer system (“CFMC Survent” CATT) randomly selected one individual from among those 12 years of age and over in the household to be the interviewee from that household.

If the randomly selected individual was between 12 and 17 years of age, the interviewer asked a parent or guardian for permission to interview the child.

In years 2000 to 2007, once the selection of a household member was made, only that individual was eligible to complete the interview. In 2008 and 2009, if the household member who was originally selected to complete the interview was not available, up to two other individuals could be randomly selected from the roster to represent the household in the survey. If both of the randomly selected individuals were not available, the individual on the phone was interviewed.

In 2009, up to 3 call attempts were made to complete an interview. If a household refused once, it was not contacted again.

The data were collected from 1,981 respondents through a combination of telephone and web surveys.

In 2009, those repeat respondents and new random respondents who indicated by phone that they had Internet access were directed to complete the interview via the Web. A URL was provided verbally, and a web link and password were e-mailed to the potential respondent to allow that respondent to complete the survey via the Web. Respondents not willing to give an e-mail address for the survey were not included in the study. A small number of respondents who indicated that they had Internet access but preferred to complete the survey over the phone were allowed to do so.

In 2009, when contacting panel members from the original sample, up to 15 call attempts were made to reach them. If the person interviewed in the prior year was no longer a member of the household, no substitution of a different household member was made.

Those participating in the survey for the second, third, fourth, fifth, sixth, seventh, or eighth year were paid a monetary incentive.

Interviews were conducted in English. Interviewing took place between April 8th and August 10th, 2009.

To correct for discrepancies between the sample data and Census data, the sample data was weighted. Sample size was preserved during the weighting process.

The final sample for year eight of the Digital Future Project was derived from two different sources, and this complicated the weighting procedure. The first portion of the sample consisted of respondents who had participated in the survey in the past. The second portion consisted of a new random sample that was recruited to replace dropouts.

An examination of the profiles of each of these sample sources revealed differences from the most current U.S. Census results. Moreover, the differences varied depending on the sample source. As a result, the weighting for this year's survey consisted of two separate weighting adjustments, one for respondents that were repeats, the other for newly recruited respondents.

Each of the different sub-samples was weighted to correct for its primary sources of deviation from the Census. After this, the two samples were combined.

The following variables were used in the weighting adjustments, although in different ways for each of the two sample sources: gender, age, income, and education. In the final weighted blended sample, the largest deviation from the 2000 U.S. Census results occurred in the race category where the weighted total sample had 13 percentage points more whites, 8 percentage points fewer blacks, 3 percentage points fewer Asians and 9 percentage points fewer Spanish/Hispanics/Latinos than the national average. All other deviations were less than 3 percentage points from Census values.

The data for the calculations were in most cases calculated to at least eight decimal places, and were then rounded to tenths. As a result, some totals may not add up to precisely 100 percent.

Decreased usage of landlines coupled with lower cooperation rates has caused the RDD sample respondents to skew significantly older than the US population. In 2009, we corrected for this by supplementing the data collected with a youth augment to balance the RDD sample. An age-targeted sample was used to recruit younger respondents (12-35) more directly. Individuals in the household meeting the specific age/gender requirement were directly invited to the survey. All youth augment respondents participating in the survey were paid a monetary incentive

	2000 US Census	Final Total 2009	
White alone	74%	87%	+13
Black or African American alone	12%	4%	-8
American Indian and Alaska Native alone	1%	1%	0
Asian alone/Pacific Islander alone	4%	1%	-3
Native Hawaiian and Other Pacific Islander alone	0%	0%	0
Some other race alone	6%	5%	-1
Two races including Some other race	0%	1%	+1
Two races excluding Some other race, and three or more races	2%	2%	0

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