

# WORLD INTERNET PROJECT INTERNATIONAL REPORT



2012

Fourth Edition

[www.worldinterproject.net](http://www.worldinterproject.net)

# PARTICIPANTS IN THE WORLD INTERNET PROJECT

## International Report – Fourth Edition

<b>AUSTRALIA</b>	ARC Center of Excellence for Creative Industries and Innovation (CCi) Institute of Social Research, Swinburne University of Technology <a href="http://www.cci.edu.au/project/digital-futures">www.cci.edu.au/project/digital-futures</a>
<b>CANADA</b>	Canadian Internet Project (CIP)/ Recherche Internet Canada (RIC) <a href="http://www.ciponline.ca">www.ciponline.ca</a>
<b>COLOMBIA</b>	Centro de Investigación de las Telecomunicaciones (CINTEL) <a href="http://www.cintel.org.co">www.cintel.org.co</a>
<b>ITALY</b>	SDA Bocconi, Bocconi University <a href="http://www.sdabocconi.it/home/it">www.sdabocconi.it/home/it</a>
<b>MEXICO</b>	Tecnológico de Monterrey, Proyecto Internet <a href="http://www.wip.mx">www.wip.mx</a>
<b>NEW ZEALAND</b>	Institute of Culture, Discourse and Communication (ICDC) AUT University <a href="http://www.wipnz.aut.ac.nz">www.wipnz.aut.ac.nz</a>
<b>POLAND</b>	Gazeta.pl Research and Analyses Unit <a href="http://badania.gazeta.pl">http://badania.gazeta.pl</a>
<b>SPAIN</b>	Internet Interdisciplinary Institute (IN3) Open University of Catalonia (UOC) <a href="http://www.uoc.edu/in3/pic/eng/communication.html">www.uoc.edu/in3/pic/eng/communication.html</a>
<b>SWEDEN</b>	.SE (The Internet Infrastructure Foundation) World Internet Institute <a href="http://www.iis.se">www.iis.se</a>   <a href="http://www.wii.se">www.wii.se</a>
<b>SWITZERLAND</b>	Media Change & Innovation Division IPMZ – Institute of Mass Communication and Media Research University of Zurich, Switzerland <a href="http://www.mediachange.ch">www.mediachange.ch</a>
<b>UNITED KINGDOM</b>	Oxford Internet Institute (OII) <a href="http://www.oii.ox.ac.uk/microsites/oxis/">www.oii.ox.ac.uk/microsites/oxis/</a>

*For the complete list of international partners in the World Internet Project, see page 89.*

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## CREDITS

Preparation of the World Internet Project International Report – Fourth Edition by:

Jeffrey I. Cole, Ph.D.

*Director, USC Annenberg School Center for the Digital Future*

*Founder and Organizer, World Internet Project*

Michael Suman, Ph.D., *Research Director*

Phoebe Schramm, *Associate Director*

Liuning Zhou, Ph.D., *Research Associate*

Andromeda Salvador Tang, *Research Assistant*

Written by Liuning Zhou

Text editing by Harlan Lebo

Production editing and cover design by Andromeda Salvador Tang

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## QUESTIONS

E-mail: [info@digitalcenter.org](mailto:info@digitalcenter.org)  
Center for the Digital Future  
USC Annenberg School for Communication and Journalism  
11444 W. Olympic Blvd., Suite 120  
Los Angeles, CA 90064  
(310) 235-4444  
[www.digitalcenter.org](http://www.digitalcenter.org)  
[www.worldinternetproject.net](http://www.worldinternetproject.net)

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# WORLD INTERNET PROJECT

## International Report

### Fourth Edition

Welcome to the findings of the World Internet Project.

This report represents the fourth published results of the World Internet Project, collaboratively produced by the Center for the Digital Future in the USC Annenberg School for Communication and Journalism in the USA and partner countries worldwide. This work on the impact of the Internet has evolved during 12 years of exploration and reveals an international picture of change brought about by online technology.

We originally created this project in 1999 because the Internet represents the most important technological development of our generation; the effects of the Internet may surpass those of television and could someday rival those of the printing press.

In little more than a decade, the Internet has become a worldwide phenomenon, transforming entertainment, communication, information-gathering, and education across the globe. The scope of change varies widely from country to country – a prime reason for a comparative international study.

By beginning our study of the Internet early in its evolution, we have built a broad base of knowledge and analyzed the effects of the Internet as it evolves, and not as postscripts after it has matured.

To achieve our objectives, the 37 countries that are partners in the World Internet Project conduct surveys of individuals in thousands of households, compiling the responses of Internet users and non-users\*. We explore how online technology affects the lives of those who use the Internet, and how the views and behavior of users differ from those of people who are not online.

The World Internet Project partners are expanding their explorations of Internet use as technology evolves. As new types of access become available – such as the growth of broadband almost a decade ago, wireless access today, or when other methods now unknown come tomorrow – the project will track them.

*\*Note: Our analysis is based on respondents aged 18 and older.*

## The World Internet Project: Why An Ongoing Study of the Internet?

The research by the global network of partners in the World Internet Project differs from most other studies of online technology in three principal ways.

### 1. The World Internet 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 World Internet 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.

### 2. The project focuses on Internet non-users as well as users

The World Internet Project follows how the behavior and views of Internet users differ from those of non-users.

### 3. The World Internet Project engages government and private industry decision-makers who can create policy based on our finding

Our work involves public and private organizations that use our results. Many WIP partners work closely with corporations – some 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 World Internet Project: Key Areas

As you will see in these pages, the World Internet Project includes findings that compare the actions and views of Internet users and non-users. The survey is organized into ten general subject areas:

- Internet users and Non-users
- Information Seeking Online
- Access to Online Services
- The Internet and Social Connections
- Politics and the Internet
- Media Use, Reliability, and Importance
- User-generated Content and Social Media
- Online Entertainment
- Online Purchase and Personal Privacy
- Online Communication

We hope these findings from the World Internet Project report will enlighten you about the many ways in which online technology 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

## HIGHLIGHTS: World Internet Project – Fourth Edition

### Internet Penetration in the World Internet Project Countries

**Overall Internet Use** -- In nine of the ten countries (all except Mexico) with data for this item in the current report, a majority of respondents were Internet users. Among the nine countries, Australia (86.8 percent), Sweden (85.6 percent), New Zealand (85.4 percent), and Canada (84.1 percent) all reported having a penetration rate more than 80 percent. *(Page 36)*

**Internet Use among Men and Women** -- There is some gender disparity in Internet use in most reporting countries, with a higher percentage of male than female users (except for Poland). The gender gap is the largest in Mexico (18 percent more men than women use the Internet), followed by Italy where close to 14 percent more men than women use the Internet. However, in Australia, Canada, New Zealand, Poland, Sweden, Switzerland, and the United Kingdom, the gap in Internet use between men and women is five percentage points or less. *(Page 36)*

**Internet Use by Age** -- Data from all WIP countries indicate a generally inverse relationship between Internet use and age. In general, Internet use increases as age decreases. *(Page 38)*

**Internet Use and Income Level** -- Disparity in Internet adoption also exists across income levels. There is typically a wide gap in Internet use between respondents in the upper 50 percent of household income versus the lower 50 percent. The largest difference are in Poland (40 percent gap) and United Kingdom (40 percent gap); the smallest gaps are in Switzerland (17 percent) and Sweden (18 percent). *(Page 38)*

### Internet Use: at Home, Work, School, and Other Locations

**Internet Use at Home** -- All of the WIP countries reported at least ten hours per week of Internet use at home, except Switzerland. *(Page 39)*

**Internet Use at Work** -- Internet users who were employed in Spain used the Internet an average of 18 hours per week at work, the highest number of hours among all WIP countries, followed by Mexico at 11.6 hours. *(Page 39)*

**Internet Use at School** -- Students in Spain spent an average of eight hours per week online at school, followed by those in Australia, who averaged 6.4 hours per week. *(Page 40)*

**Internet Use from Other Locations** -- Internet use in locations other than home, school, or work is generally low--under one hour per week on average in five of the reporting countries. *(Page 40)*

**Internet Connections at Home** -- More than 94 percent of Internet users in the reporting countries have Internet access at home. Spain has close to universal home Internet access. *(Page 42)*

**Connection Types at Home** -- The type of Internet connection used at home varies across the WIP countries. More than 80 percent of the Internet users in the U.K., Sweden, Canada, Australia, and New Zealand have broadband at home. However, 13.5 percent and 37.3 percent of Internet users in Switzerland and Spain, respectively, still access the Internet at home through a phone modem. *(Page 42)*

## Wireless Internet: Access and Usage

**Handheld Devices** -- Wireless Internet through handheld devices has yet to be widely adopted in the WIP countries. Only the United Kingdom (40.6 percent), Sweden (42.1 percent), and Australia (42.9 percent) have 40 percent or more of Internet users who went online through wireless handheld devices. *(Page 41)*

## Internet Non-Users

**Reasons for Not Going Online** -- In nine out of the ten WIP countries (all except for Italy) with data for this item, “no interest/not useful” was the primary reason cited by non-users. The cost of Internet service was not a significant factor for non-use in most of the WIP countries. *(Page 43)*

## Information Seeking Online

**Product Information** -- High percentages of users in most of the reporting countries go online to get product information. *(Page 45)*

**Travel Information** -- Substantial percentages of Internet users in most of the WIP countries go online at least monthly to look for travel information. Conversely, high percentages of Internet users in three countries go online to search for travel information less than monthly or never: U.K. (65 percent), Poland (68 percent), and Colombia (90 percent). In Colombia 67 percent of Internet users never go online to look for travel information. *(Page 45)*

**Health Information** -- Large percentages of users access online information about health issues in most of the WIP countries. In all WIP countries except Colombia, 30 percent or more of Internet users do so at least monthly. *(Page 46)*

**Finding or Checking a Fact or the Definition of a Word** -- Forty-three percent or more of users in all WIP countries except Switzerland go online at least weekly for fact finding or checking. Thirty percent or more of users in all of the WIP countries except the U.K. and Poland go online at least weekly to look up a word. *(Page 47-48)*

**Internet Use for School-Related Work** -- Using the Internet for school-related work is a popular online activity among student users. In all WIP countries except Poland, at least 75 percent of student users access the Internet for school-related work weekly or more often. *(Page 48)*

**Online Financial Transactions** -- In all of the WIP countries a higher percentage of Internet users accesses online banking services than makes online payments at least monthly. Online investing has been adopted by very small percentages of users in the WIP countries. *(Page 53)*

## Internet Use: Contact with Others

**Internet Use: Effect on Contact with People Who Share User's Hobbies and Recreational Activities** -- In all WIP countries relatively high percentages of users believe that going online has somewhat or greatly increased their contact with people who share their hobbies or recreational activities. *(Page 55)*

**Internet Use: Effect on Contact with People Who Share User's Political Views** -- Generally, relatively low percentages of users reported that the Internet has increased their contact with people who share their political views. *(Page 56)*

**Internet Use: Effect on Contact with People Who Share User's Religious Beliefs** -- In all of the WIP countries except for Poland, Sweden, and the U.K., Internet use has an overall negative perceived impact on people's contact with those who share their religious beliefs. Higher percentages of users in all except for those three countries said that going online has decreased rather than increased such contact. *(Page 56)*

**Internet Use: Effect on Contact with People Who Share User's Profession** -- Internet use has an overall positive perceived impact on users' contact with those in their profession; higher percentages of users in all WIP countries reported increased as opposed to decreased contact. *(Page 57)*

## Internet Use: Contact and Socializing with Family and Friends

**Internet Use: Effect on Contact with the User's Family** -- Use of the Internet exerts a positive impact on users' contact with their family members; in all the WIP countries higher percentages of users reported increased as opposed to decreased contact as a result of Internet use. *(Page 58)*

**Internet Use: Effect on Contact with the User's Friends** -- Similar to its impact on contact with family members, Internet use seems to have brought users closer to their friends. In all WIP countries the percentages of users reporting increased contact with friends as a result of Internet use are much higher than those reporting decreased contact. *(Page 59)*

**Time Spent Socializing Face-to-Face with Family** -- Internet use does not necessarily take away from the time that users spend with their family. In all reporting countries except for Spain users spend more time socializing with their family than non-users. *(Page 59)*

**Time Spent Socializing with Friends Outside of School or Outside of Office Hours** -- There is no clear association between Internet use versus non-use and time spent with friends. In five of the reporting countries non-users spend more time socializing with friends than users. In the other three reporting countries users spend more time with friends. *(Page 60)*

## The Internet and the Political Process

**People Can Have More Political Power** -- In the current study, only in Spain (52 percent) does a majority of Internet users believe that the Internet can give people more political power. *(Page 62)*

**People Will Have More Say about What the Government Does** -- Three countries reported 40 percent or more of Internet users who said Internet use will grant people more involvement in governance. *(Page 63)*

**People Can Better Understand Politics** -- In spite of their doubts about the ideas that Internet use will empower them or give them more participation in the governance process, Internet users tend to have more faith that Internet use will enable people to better understand politics. *(Page 63)*

**Public Officials Will Care More about What People Think** -- In general, Internet users are not very confident about the role of the Internet in engaging public officials in people's concerns. *(Page 64)*

## Freedom of Expression Online

**Comfort Expressing Views about Politics** -- A majority of respondents in five of the six reporting countries (all except Switzerland) with data for this item agree that they are comfortable expressing their views about politics online. *(Page 65)*

**Criticizing the Government on the Internet** -- More than a majority of Internet users in all reporting countries believe that in the online environment they should have the freedom to criticize their government. *(Page 66)*

**Expressing Ideas on the Internet, Even if they are Extreme** -- Among the seven reporting countries, only Spain (70 percent), Poland (56 percent), and Australia (54 percent) have a majority of Internet users who support extreme forms of free speech. In Switzerland, only 35 percent of users believe that it is acceptable for people to express their extreme ideas online. *(Page 67)*

**Government Regulating the Internet** -- In seven of eight countries with data for this item, 36 percent or less of users believe that the government should regulate the Internet more than it does now. *(Page 67)*

## Use of Traditional Media

**Television, Radio, and Newspapers** -- Among the three traditional media under examination in the World Internet Project, people generally spend more time with television than with radio and newspapers in almost all reporting countries. *(Page 69)*

**Use of Internet to Look for News** -- Looking for news online is a common activity in most countries. *(Page 70)*

**Media Reliability: Information on the Internet** -- Internet users in the WIP countries do not always trust the information on the Internet to be reliable. In all WIP countries except the U.K., 43 percent or more of users believe that about half of the information on the Internet is reliable. *(Page 70)*

**Media as Information Sources** -- Internet users do not always look at the Internet as the most important source of information. Only in five of the nine WIP countries with data for this item was the Internet chosen by the highest percentages of users as an important or very important source of information among the different media platforms. *(Page 72)*

**Media as Entertainment Sources** -- Internet users tend to value television and the Internet more than newspapers and radio as sources of entertainment. *(Page 73)*

## Blogs and Postings

**Working on Blogs and Reading Blogs** -- In all of the WIP countries more Internet users read blogs than write blogs. *(Page 75)*

**Posting Photos or Pictures** -- A quarter or more of Internet users in all reporting countries post photos or pictures online at least monthly. In Spain and Switzerland 38 percent of users are engaged in this activity at least monthly. *(Page 75)*

## Visiting Social Networking or Video-sharing Websites

**Social Networks and Video-Sharing** -- Compared with other forms of social media activities, Internet users in many countries are more attracted to social networking or video-sharing websites. Among all reporting countries more than a majority of users engage in these activities. *(Page 78)*

## Content Consumption

**Download or Listen to Music** -- More than a majority of Internet users in all of the WIP countries go online to download or listen to music. In all reporting countries except for Switzerland and New Zealand, at least 30 percent of users download or listen to music over the Internet at least weekly. *(Page 81)*

**Download or Watch Videos** -- Lower percentages of users go online to download or watch videos compared to downloading or listening to music online. In all of the reporting countries except for Colombia, more than 40 percent of users never go online to download or watch videos. *(Page 81)*

## Buying Online and Privacy Concerns

**Online Purchasing** -- Purchasing online has become a regular experience for more than one third of the Internet users in most reporting countries. In Canada, Sweden, Switzerland, New Zealand, the U.K., and Australia 34 percent or more of Internet users purchase online at least monthly. Among them, 53 percent of users in the U.K. and 58 percent in Australia do so at least monthly. *(Page 83)*

**Concern about Privacy** -- Levels of concern about the security of credit card information during online purchasing are very high in all of the WIP countries. At least 60 percent of Internet users in all reporting countries reported some level of concern when or if they bought something online. *(Page 84)*

## Online Communication

**E-mails and E-mail Attachments** -- For a majority of Internet users in all WIP countries checking e-mail has become a regular daily activity. Sending e-mail with attachments is a less regular form of online communication. *(Page 86)*



**Instant Messaging and Chat Rooms** -- Compared with sending and receiving e-mail, instant messaging and participation in chat rooms are less frequent activities for the vast majority of Internet users in the WIP countries. Instant messaging is a daily experience for a low percentage of Internet users in all reporting countries. Only in three of the ten reporting countries with data for this item do 30 percent or more of Internet users engage in instant messaging daily or several times a day. Even fewer Internet users participate in chat rooms on a regular daily basis. *(Page 86)*

**Online Telephone Calls** -- In spite of the development of online telephony, a majority of Internet users in all WIP countries except for Poland never make or receive phone calls over the Internet. *(Page 87)*

# **INTERNATIONAL PARTNERS: Status Reports**

## The Internet in 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](http://www.cci.edu.au/projects/digital-futures)

Geography and history have shaped the Internet in Australia. Household take-up has so far been a story in three parts: very rapid diffusion of dial-up access through the 1990s, followed by a period of relatively slow broadband adoption in the early and mid-2000s, and then a period of faster adoption. In 2011 86 percent of Australian homes had an Internet connection, the vast majority broadband. The current position is clearly the result of a distinctive communications landscape, characterised by infrastructure and competition issues which have taken many years to resolve at a policy level. Australia has a small population dispersed across a very large area and concentrated in a few major cities. Supporting communication services for Australians living outside the major cities has long been a critical problem for governments. At the same time, the policy decisions that have led to a comparatively low subscription television take-up have also influenced broadband adoption.

The Australian government is now rolling out an ambitious fibre-to-the-home national broadband network with a total estimated cost of \$43 billion. The network will provide minimum speeds of 100 Mbps to 93 percent of Australian households by 2018. Our research found that two-thirds of Australians support the National Broadband Network, with support slightly stronger amongst younger people and Internet users.

The Australian government has also been active in reviewing policy related to the Internet over the last few years. The Convergence Review analysed the implications of the new media landscape for questions of ownership and control of media companies, and for the production and distribution of Australian content. An inquiry into the Australian retail sector investigated the impact of online shopping. The Independent Media Inquiry considered the need for a new regulatory body that would oversee both online and offline news media and also investigated the impact that the Internet was having on the financial viability of print and online journalism. There also have been reviews of the system of censorship and classification, and a wide-ranging inquiry into copyright in the digital age is currently underway.

We have reached a point where there is almost universal broadband access in Australia's more affluent households, but a large proportion of low-income households are still without home broadband access.

Almost four in ten households in the lowest income group do not have home broadband. Furthermore, those low-income households with access are more likely to describe the costs of connection as unaffordable. Households on lower incomes are not any more likely to be dissatisfied with the speed or reliability of their home connection, but they do appear to derive less benefit from their Internet access. They are less likely to access government services or information online, less likely to see the Internet as a fast and efficient means to access information, and more likely to see the Internet as a frustrating technology.

The government's ambitious plans for broadband delivery in Australia and the implementation of the various policy reviews recently undertaken promise to make the next few years a period of dynamism and innovation in Australian's use and experience of the Internet. The challenge for the government will be ensuring that the benefits from the National Broadband Network are spread as widely as possible.

## The Internet in Canada

### The Canadian Internet Project (CIP)

#### The Canadian Internet Project Research Group

[www.ciponline.ca](http://www.ciponline.ca)

Although the proportion of Canadians using the Internet has more than doubled since the year 2000 --from 40 percent in 2000 to well over 80 percent today -- growth in recent years has been incremental, from 72 percent in 2004 to 86 percent in 2011. When you include casual users -- or those who use the Internet from time-to-time -- 9 of every 10 Canadians is engaged with the Internet. This engagement is reflected in some important trends:

- From 2004 to 2011, overall average time spent on the Internet by Canadians increased by 48% -- from 13.2 hours per week in 2004 to 19.5 hours per week in 2011;
- The percentage of relatively heavy users (online 15 hours per week or more), has grown from 33 percent in 2004 to 46 percent;
- Since 2004, there has been an increase of more than 20 percent in Internet use in smaller towns and rural areas;
- There have also been significant increases in Internet use among seniors (now 54 percent for Canadians over 65 years of age) and lower income households (now at 65 percent in households earning under \$40,000);
- Among Canadians under 30, Internet use is for all practical purposes universal;
- The percentage of Canadians who do not use the Internet and have no interest in ever using the Internet has dropped significantly to only six percent, most of whom are over 65 years of age.

These trends have modestly reduced digital divides based on education, household income, and education, though they are stubbornly persistent at lower levels. Gender differences in Internet access are no longer significant, though some differences persist. For most online activities, from texting to posting comments, men are slightly more active than women.

The reductions in Internet access differences are, at least in part, the result of efforts by the federal government and some provinces to assist private providers to extend their services into underserved areas. As a result of these efforts, Canada is currently ranked fourth in Internet impact by the WWW Foundation's Web Index 2012 and ninth by the World Economic Forum's Networked Readiness Index 2012 (but fourth in infrastructure). The spread of access to broadband services is notable: from 71 percent of Internet users in 2004 to 92 percent in 2012. Most of those still on dial-up modems are in rural areas.

The cost of Internet services in Canada has been the subject of considerable public debate, even though only a small proportion of non-users cite cost as a factor in not being online. Recently, the Canadian Radio-television and Telecommunications Commission (CRTC) has begun to examine wireless contracts and other fees charged by Internet service providers. Other topical public issues include copyright and privacy; for example, regulations requiring Facebook to upgrade its privacy settings and proposed legislation to require Internet service providers to share information with law enforcement. Concerns over online bullying and fraud have, however, not convinced Canadian Internet users that additional government regulation is required. Almost two-thirds are opposed.

The evolution of the Internet in Canada from a communication-information service to an all-purpose experience is illustrated by several developments:

- the notable increase in the perceived importance of the Internet for entertainment (up more than 30 percent since 2004);
- the growth in a wide range of entertainment activities online, from consuming traditional media to playing games;
- the growing use of mobile devices for purposes other than communication; for example, nearly half of Canadians under 30 surf the web from a mobile device and one in five uses these devices to watch videos and play games.

With respect to traditional media, television viewing has increased significantly, among both Internet users and non-users. In terms of hours in a typical week, television use by Internet users has increased by more than one hour since 2007, from 10.2 to 11.4 hours per week. For non-users, the increase was nearly three hours, from 14.0 to 16.7. The gap has also increased, as Internet users transfer some of their entertainment time to online services. This is especially true for younger Canadians who increasingly view television, videos, and movies online. Nevertheless, offline television is still the dominant medium and is heavily used by both Internet users and non-users.

Like most jurisdictions, Canada has seen strong growth in Internet use for entertainment, getting news online, and for socializing. More than half of Canadian Internet users visit social networking sites and 43 percent do so regularly. The main reason for visiting social media, provided by a majority in all age groups, was to socialize vicariously with friends and family.

Overall, then, Internet use in Canada has continued to grow and also to broaden and deepen, as many Canadians have integrated the Internet completely into their everyday lives -- at home, at work, and at school.

## The Internet in Colombia

### Centro de Investigación de las Telecomunicaciones (CINTEL)

[www.cintel.org.co](http://www.cintel.org.co)

Internet access in Colombia has increased in recent years, thanks to government policies and competition among operators. There has also been a substantial migration from switched to dedicated connections and an important increase in mobile Internet access. By the end of 2011, dedicated access connections represent 54.3 percent of total connections and mobile access subscriptions 45.4 percent, according to information provided by the Ministry of Information and Communications Technologies.

The total number of subscribers to fixed and mobile access was 6.14 million in 2011, 40 percent more than in 2010. Considering that the population of Colombia is 46 million and that there are 12.5 million homes, 13 percent of inhabitants and 49 percent of households had Internet access through an ISP subscription. According to the National Administrative Department of Statistics, 40.4 percent of the population uses the Internet and 16.47 million people over the age of 5 used Internet at least once in 2011. Ninety-one percent of those accessed in urban areas, in contrast to 9 percent in rural areas, indicating that a digital divide continues to exist.

Mobile Internet access is provided by seven operators, three of which are mobile network operators and one a mobile virtual network operator. Thirty-five percent of Colombians used the mobile Internet in 2011; of these, six percent used it through post-paid plans.

The definition of broadband was updated in 2011. According to the National Telecommunications Regulatory Authority, fixed broadband refers to connections with download speeds of at least 1.024 kbps and upload speeds of at least 512 kbps. By the end of 2011, 91 percent of dedicated access connections were broadband (78 percent of total connections).

### Supply Side

On the supply side, in the last 5 years the number of ISPs has decreased. In 2011 there were 39 ISPs, with four ISPs accounting for 88 percent of market share. During 2011 the retail price average of access in the residential segment was US\$17.54 monthly per Mbps, US\$1.7 less than 2010.

### Demand Side

On the demand side, the frequency of use increased from 2007 to 2011. Users increased the time that they spent working on blogs, making video calls, sending files and e-mails, participating in e-commerce activities, making online purchases, and getting information about products. At the same time, users were more concerned about the security of online transactions than they were in 2009.

## The Internet in Italy

**SDA Bocconi<sup>1</sup>**

**Bocconi University**

[www.sdabocconi.it/home/it](http://www.sdabocconi.it/home/it)

Italy, with a population of nearly 61 million, is the fifth most populous country in Europe. It produced a GDP of 2,198,730 US Dollars in 2011, ranking 8<sup>th</sup> in the world (International Monetary Fund, 2011). But Italy's ranking drops dramatically in the realm of technology. According to the OECD (2011), Italy ranks 24th and 28th, among 34 countries considered, in regard to fixed and wireless broadband subscriptions per 100 inhabitants. The predominant access technology is DSL. In December 2011 the percentage of fibre connections on total broadband was only 2.12 percent. A report from the European Commission (2012) estimates that 5 percent of the population is still affected by the digital divide, and that "progress in the deployment of high-speed (30 Mbps) and very high-speed broadband (100 Mbps) has so far been less encouraging, both in terms of coverage and take-up."<sup>2</sup> In January 2012 the speeds available to the vast majority of the population were below 10 Mbps (with 89.6 percent of lines lies between 2 and 10Mbps).

The digital gap in Italy is not only due to infrastructural delay. It is also influenced by demographic, economic, cultural, social, policy, and even geographical factors. Italy has a relatively older population, with lower than average education levels, and only 68 percent of the Italian population live in urban settings (versus 81 percent in the US). We know that these variables affect technology adoption. The predominantly humanistic (as opposed to scientific) culture and the delay in investments in IT education have also played a role. IT literacy has been shown to be the biggest factor explaining technology adoption by populations and organizations<sup>3</sup>. A recent report by the Presidenza del Consiglio dei Ministri points to the lack of policy in this area as hindering the diffusion of digital services in the local government administrations. The same report identifies as one of the most powerful drivers for reducing this digital gap the capacity of business and government institutions to offer value-added digital services to the population. An example comes from the digitalization of health services. Besides impacting the quality of life and digital literacy, it has been estimated that with the digitalization of health services the National Health System could save 10 percent of its costs.<sup>4</sup>

The realm of mobile connections is more encouraging. The penetration of mobile broadband is increasing at a relatively rapid pace, in particular by means of smartphones and tablets. Mobile data traffic in 2011 increased by 53.6 percent.<sup>5</sup> The coverage of 3G networks is very extensive (92 percent), and the launch of 4G networks has been commercially planned for the end of 2012. Forty-four percent of the Italian mobile audience uses smartphones (up from 35 percent in 2010), lower than in the U.K. and Spain (51 percent in both countries), but higher than in the U.S. (42 percent) and Germany and France (40 percent).<sup>6</sup> At the same time point the installed base of smartphones in Italy consisted of 21 million devices (versus 25 million in the

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<sup>1</sup> The WIP project at SDA Bocconi also benefits from the collaboration with the University of the Italian Switzerland, Lugano

<sup>2</sup> European Commission Italy TELECOM MARKET & REGULATORY DEVELOPMENTS.  
[http://ec.europa.eu/information\\_society/digital-agenda/scoreboard/countries\\_2012/country\\_it.html](http://ec.europa.eu/information_society/digital-agenda/scoreboard/countries_2012/country_it.html)

<sup>3</sup> Osservatorio Italia Digitale 2.0. Presidenza del Consiglio dei Ministri. 2012

<sup>4</sup> Ibidem

<sup>5</sup> Ibidem

<sup>6</sup> COMSCORE 2012 Mobile Future in Focus

U.K., 21 million in Germany, 19 million in France, and 18 million in Spain). The spread of smartphones in Italy can be tied to a number of factors, including rates of digital literacy, fashion and style trends among the young, and the desire/need for broadband social-mobile services.

What puzzles researchers and policy makers is that this very high penetration of devices does not correspond to a higher adoption of sophisticated services. According to the European Commission report, in 2011 the number of active wireless broadband users grew by approximately 3 million, reaching 31.3 percent penetration, remaining below the EU average of 43.1 percent.<sup>7</sup> According to COMSCORE, the percentage of Italian mobile media users (defined as mobile users who browse the web, access applications, or download content) was an encouraging 44 percent (the same as in France), but still lower than in Spain (50 percent), the U.S. (55 percent), the U.K. (57 percent), and Japan (76 percent). Ten percent of the Italian smartphone audience use barcodes (versus 16 percent in Germany and 20 percent in the U.S.).

Italian digital policy has undergone substantial change since the new Monti government took over in 2011. The previous plan, aimed at coordinating public and private intervention on fixed NGA networks, has been abandoned. The new government has declared its intention to launch an integrated digital strategy, both on the demand and supply side. The elimination of the digital divide in the rural areas has become a policy priority and substantial funds have been allocated to achieve this goal.

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<sup>7</sup> European Commission Italy TELECOM MARKET & REGULATORY DEVELOPMENTS.  
[http://ec.europa.eu/information\\_society/digital-agenda/scoreboard/countries\\_2012/country\\_it.html](http://ec.europa.eu/information_society/digital-agenda/scoreboard/countries_2012/country_it.html)



## The Internet in Mexico

### Tecnológico de Monterrey, Proyecto Internet

[www.wip.mx](http://www.wip.mx)

Mexico ranks twelfth in the world in total Internet users, with 40 million. In our 2011 survey we found that 10.1 million users are concentrated in Mexico City. The rest of the users are distributed as follows: 6.8 million in the midwest, 6.6 million in the northwest, 6.5 million in the southeast, 6.1 million in the middle, and 3.8 million in the northeast.

Currently, 30 percent of households in Mexico have a computer, but this number grows to 90 percent among those in the higher socio-economic levels. The lack of economic resources is the main reason that Mexicans give for not having a computer. But more than 40 percent of Mexican users access the Internet in public places. Quality and price of connecting services are also barriers to Internet use. Costs for mobile telephony and broadband Internet in Mexico are among the highest in the OCDE. Even though multiple providers have entered the market, prices for connectivity are still very high.

Social networking sites have become popular. Today, the typical Mexican Internet user spends more than 50 percent of his/her time on social networking sites, e-mail, and instant messaging. Online commerce, on the other hand, is not very developed. Less than five percent of users have made an online purchase. Some barriers that hinder online purchasing are inadequate payment processes and platforms, and fear of identity or information theft. Only seven percent of advertising revenue in Mexico is spent on the Internet. Nevertheless, significant increases in advertising revenue are expected in the coming years.

## The Internet in New Zealand

### Institute of Culture, Discourse and Communication (ICDC)

#### AUT University

[www.wipnz.aut.ac.nz](http://www.wipnz.aut.ac.nz)

The Internet was adopted relatively swiftly in New Zealand, leading to high overall Internet access figures – 86 percent of respondents in our 2011 WIP survey stated that they use the Internet. The need for broadband development, however, has been a major issue because of the lack of optic fibre cabling and an over-reliance on ageing copper cables in some parts of the country. As a result, the government’s Ultra-Fast Broadband initiative has committed to delivering fibre connectivity to schools, hospitals, and 90 percent of businesses by 2015, and to three-quarters of all New Zealanders by 2020. This commitment marks a sea-change in telecommunications policy and will radically influence the role of the Internet in New Zealand society.

While much public discourse is focused on the development of high speed broadband infrastructure, recent years have seen other Internet-related policy changes. These changes deal with issues such as cyber-security, privacy, and intellectual property. “Anti-spam” legislation (the Unsolicited Electronic Messages Act) was passed in 2007, prohibiting the sending of unsolicited commercial e-mails. The new law also requires all commercial e-mails to include a functional unsubscribe facility, along with accurate information about the person who authorised the sending of the message.

In 2011, the Copyright (Infringing File Sharing) Amendment Act came into force to prevent illegal file sharing. Individuals can now be fined for copyright infringement for online file sharing using peer-to-peer protocols. This new policy will affect the downloading habits of many Internet users. Alongside these law changes, other policy changes have focused on security and privacy issues. 2011 also saw the launch of a “Cyber Security Strategy,” which aims to increase awareness about online security and to develop resources to deal with security breaches. Meanwhile, a review of the Privacy Act by the Law Commission has recommended a range of policy changes that will protect the security of Internet users’ personal information.

In addition to these changes in government policy, the importance of tracking developments in Internet use is also increasingly acknowledged. The three WIP surveys, conducted in New Zealand since 2007 with funding from the National Library of New Zealand and InternetNZ (a non-profit organisation dedicated to protecting and promoting the Internet), demonstrate that New Zealanders already use the Internet in a myriad of ways. The data suggests that the Internet has become firmly embedded in New Zealand society, and is highly valued for education and training, information, commerce, entertainment, and socialising. As New Zealand moves towards a high speed Internet environment, a number of current trends in Internet use are likely to accelerate while the prominence of other more traditional online activities is likely to decline.

Despite concerns about infrastructure and the ongoing need to further close digital divides relating to household income and geographical area, Internet use is evolving rapidly, especially given the shift towards broadband subscriptions.

At such a juncture in the history of the Internet, WIP New Zealand is well positioned to identify and track key trends and transformations as they arise. The roll-out of fibre optic cables to schools, businesses, and households over the coming years will provide high speed access for both download and upload. Meanwhile, Internet access through the cellular network is also likely to increase dramatically as products such as the iPhone become widespread. With speed and mobility, Internet-based activities are increasingly likely to become part of the fabric of everyday life for New Zealanders.

## The Internet in Poland

### Gazeta.pl Research and Analyses Unit

<http://badania.gazeta.pl>

The number of Internet users in Poland is still growing. Currently, the Internet is used at least from time-to-time by nearly two-thirds of Poles aged 15 and above. About the same percentage of Poles have Internet access at home. The Internet is used almost equally by men and women. Internet usage continues to be strongly correlated with age and education: the older or less educated the respondents, the lower the chance they use the net or have access to it.

Nearly all Internet users have a computer. The popularity of laptops is growing—penetration rose 10 percent over the last year. Interestingly, the number of respondents who declared that they own a stationary computer as well as a laptop increased, which suggests that laptops are supplementing PCs instead of substituting for them. The majority of Internet non-users do not have any computer.

The Internet is still mainly used at home. The majority of Internet users use the Internet at home, though more than half of students use the net at school and a third of employees or business owners use it at work. Using the Internet in other places—such as Internet cafes, libraries, or other people's homes—is rather uncommon.

The Internet access profile in Poland is fairly stable. Three-quarters of respondents with Internet access have broadband. Mobile Internet is used by about 10 percent of Internet users, as was the case last year. These users access the net with mobile devices for approximately 15 minutes a day on average. Also the same as last year, few respondents have more than one type of Internet access.

More than a third of Poles aged 15 and above do not use the Internet, mainly due to lack of interest (half of non-users claim this). One-fifth attribute their non-usage to lack of a computer or Internet connection (four-fifths of Internet non-users have no computer or Internet access, but only some of them perceive this to be a barrier to using it), and 15 percent to their inability to use it.

Nearly one-quarter of Internet non-users report having used the Internet, primarily out of curiosity. Half of Internet non-users who have tried the Internet did so out of curiosity. A quarter wanted to check information (i.e., television programs, news, prices). More than three-quarters of Internet non-users have never had any contact with the Internet, an increase from last year. These Internet rejecters are more common among respondents with only a primary school education and those without Internet access at home.

Non-users associate the Internet mainly with access to information. Nearly half of Internet non-users mentioned information as the main advantage of using the Internet—including easy access to information, its abundance, and rapid access to it. The main disadvantage of the Internet according to non-users is consumption of time.

The amount of time spent on the Internet is comparable to the amount of time spent in front of the television, but the time spent on each varies sharply by age: the younger the respondents, the more time they spend on the Internet; and the older the respondents, the more time they spend watching television.

Polish Internet users are more likely to engage in online shopping than online banking. The majority of Internet users gather information about products online, and more than half shop on the net. The most commonly purchased items online are clothes and shoes. There appears to be resistance to online banking. Less than half of users engage in online banking and bill paying. Using the Internet for functional reasons (such as paying bills, checking prices, banking) is more popular among inhabitants of big cities, even though they have easier access to traditional channels for taking care of these things.

Although the option of filing tax returns via the Internet without an electronic signature has been offered in Poland for three years, very few people take advantage of it (only 3 percent of the population and 5 percent of Internet users). Moreover, a national census was conducted in 2011 in which citizens could take part via the Internet, thereby eliminating the need to be visited by a census taker, yet only a tenth of Poles took advantage of this option.

Internet users read more books (7 books a year on average) than non-users (5 a year), and in both cases this is fewer books than last year. It is interesting to note that even Internet users obtained their books in traditional ways, such as borrowing them from friends, buying them in bookstores, and borrowing them from libraries. Only a tenth of Internet users buy books via the Internet. Nearly no one reported downloading text files (e-books) or audio books from the Internet. Polish readers appear to be attached to the traditional book format.

One-third of Internet users download files for free. Few Internet users said they pay for downloading various files (usually movies and music). Non-paid downloading usually involves music (a quarter of Internet users download music files for free), movies (a fifth do so for free) and, to a lesser degree, games (downloaded for free by 7 percent of Internet users). Those who download the aforementioned content for free said their main reasons for doing so were convenience and speed of access. A third claimed they could not afford to buy the content legally. About a quarter said they download for free because they do not have to pay for the content, even though they could afford it. Few of these people said they had no other access to downloaded content.

## The Internet in Spain

**Internet Interdisciplinary Institute (IN3)**

**Open University of Catalonia (UOC)**

[www.uoc.edu/in3/pic/eng/communication.html](http://www.uoc.edu/in3/pic/eng/communication.html)

What changes has the spread of the Internet in the home environment caused in the social and cultural landscape of Spain? According to our survey, the Internet has become more important than television, radio, and newspapers as a source of information and entertainment. The Internet and television are more appreciated for their entertainment value than for their informational value. On the other hand, the radio and especially newspapers are more valued for their informational value.

Still, most Internet users believe that the Internet is quite important as a means of information, ahead of television, newspapers, and radio. This is the case for all age groups, but more so for those between the ages of 19 and 24 and less for those over 64. (“Information” does have a very broad meaning for Internet users, including national and international news, travel information, health information, opinions expressed in blogs, and much more.)

In regard to entertainment, people use the Internet more than other media. (Again, the entertainment-related uses are varied, including downloading and listening to music, visiting social networking sites, downloading or watching videos, listening to online radio, and much more.)

Overall, almost 70 percent of the Spanish population uses the Internet. Young people are more likely to be users, but the data show that use among seniors has grown remarkably in recent years.

The Internet has become the preferred option for information and entertainment. The Internet is not only a source in itself, with services and products like social networking sites and blogs, but also a conduit through which other media (for example, television, the press, and radio) are consumed.

The most remarkable feature of cultural consumption on the Internet is that this consumption is becoming evidently more social. On the Internet consumption and conversation occur simultaneously and feed each other. After decades in which television has been the center of the media ecosystem, it is time for industry and academia to begin to rethink their understanding of mass communication, as the audience has already started to do very seriously, at least in our country.

## The Internet in Sweden

### .SE (The Internet Infrastructure Foundation)

#### World Internet Institute

[www.iis.se](http://www.iis.se)

[www.wii.se](http://www.wii.se)

In 2012 Sweden is still ranked first in the World Economic Forums Network Readiness Index 2012 and in the WWW Foundations Web Index 2012. But when it comes to the number of high capacity broadband connections, Sweden is not among the first ten countries (Akamai, 2012).

Sweden, along with the other Nordic countries, has been at the forefront of Internet diffusion. Sweden remains in the leading position and, depending on what age range the estimate is based on, 94 percent (where those over the age of 75 are excluded) or 89 percent of adults are online.

Recently there has been special interest in the older generations as 18 percent of the population is older than 65 and most non-users belong to this group. A campaign to increase the digital participation among those who still are non-users has been launched with involvement of libraries and a variety of educational associations.

Even if 97 percent of the users have access to a broadband connection (86 percent of the population), not everyone, especially in remote areas, has a high capacity (100 MB) connection. The government has set aside money to address this problem.

There have been significant changes in the use of the mobile Internet after the introduction of new smartphones and a new pricing system. The number of users and actual usage has increased significantly. Today 54 percent of the population is using smartphones and 20 percent has access to a tablet. Young people, including those as young as eight years old, are the most active users of the mobile Internet.

Those who were surrounded by computers and the Internet from the beginning of their lives are now growing up. At the turn of the century those in their early teen years were beginning to familiarize themselves with the Internet. In the year 2000 half of 13-year-olds had tried the Internet. Four years later, in 2004, half of nine-year-olds had begun to at least occasionally use the Internet. In 2012 this 50 percent online figure applies to those 3 years of age.

Blogging has never been a common activity here (only six percent of all Swedes in 2012), but it has become part of the Internet culture among young Swedish women. This typically begins for females in their early teen years, when boys are still mostly interested in gaming. Already at the age of 12 half of all girls are active on blogs. And among those females between the ages of 16 and 25, two-thirds actively write or have written a blog, and three of four read others' blogs.

After a steady rise in the percentage of those who share files in the past ten years, this activity seems to have plateaued. Young men dominate in this area. Half of young men between the ages of 16 and 25 share files, and another 25 percent have shared files at some point in the past.

More Internet users are reading newspapers, listening to the radio, and watching television online. But still the traditional platforms dominate the use of the traditional media. Very few are not watching television from a traditional television set and very few are not reading printed newspapers. There is, however, one exception: tabloid newspapers are now mostly read online.

## The Internet in Switzerland

Media Change & Innovation Division

IPMZ – Institute of Mass Communication and Media Research

University of Zurich, Switzerland

[www.mediachange.ch](http://www.mediachange.ch)

### High Internet diffusion but no end to digital gaps

With an *Internet penetration* rate of 77 percent, Switzerland belongs to the upper third of countries when compared internationally, but it is not at the forefront. Furthermore, there is a high penetration of high-capacity Internet connections. Three-quarters of those who use the Internet at home have a broadband connection. Twenty-six percent of the Internet users access the Internet by way of mobile en route.

Although Switzerland is in the upper segment in various comparative international ICT and Internet statistics, indicators of a *digital divide* are also apparent. Twenty-three percent of the population does not use the Internet. The “age gap” is very pronounced between the age group 60 and above on the one hand and younger generations on the other. People who do not use the Internet are also disproportionately in the population groups with a lower education (49 percent), lower income (50 percent), and without employment (40 percent). The use of mobile Internet en route (26 percent) is primarily among those in the upper income and highly educated groups (for both, usage rates have reached 30-40 percent). In low-income and low-educated groups, just about one in ten use the mobile Internet.

There is hardly any gender gap in Switzerland for Internet use in general as 75 percent of women and 79 percent of men are now online. However, women use the Internet less intensively. This gender difference is clearly evident in regard to the mobile Internet. While a quarter of men have already adopted mobile Internet, the diffusion rate among women is only 15 percent.

In general, a sharp reduction of the digital divide is not in sight as a phase of stagnant Internet growth seems to have been reached.

Besides these factual digital gaps, there are also *perceived break lines*. Forty-two percent of the Swiss population feel not at all or only marginally integrated into the information society. Unsurprisingly, the proportion of people who feel uninvolved is particularly high among non-users (74 percent). But even among Internet users, a third (33 percent) do not feel involved or only marginally involved in the information society.

The survey also shows *digital gaps on the application level*. The Internet is not equally used across generations. Most Internet applications, especially those that are interactive, are significantly more common among younger users than older ones. The use of the Internet for digital recreation and the production and distribution of user-generated content is also more widespread among younger users. In contrast, e-commerce services are used to a larger extent by older users.

In addition, differences appear among education groups in the use of applications for recreation, information, and commerce. Entertainment services are more widespread among the less educated, and information applications among better educated people. Moreover, better educated people use commerce-related applications such as e-banking and e-shopping to a higher extent than the less educated.



## The Internet in the United Kingdom

### Oxford Internet Institute (OII)

[www.oii.ox.ac.uk/microsites/oxis](http://www.oii.ox.ac.uk/microsites/oxis)

In Britain the Internet has diffused gradually over the last several years to reach 73 percent of individuals aged 14 and over in 2011, increasing from 66 percent in 2007 and 70 percent in 2009. A slight increase in Internet use has been observed across all levels of income. While the diffusion of the Internet in Britain has not changed much in the recent years, we have observed dramatic changes in how and where the Internet is being accessed and used. The two most notable trends are the emergence of “Next Generation Users” and the rise of social networking sites.

Next Generation Users are defined by two separate but related trends: they access the Internet from multiple locations and devices. Operationally Next Generation Users are defined as people who use at least two Internet applications on their mobile phone or who fit one of the following criteria: they own a tablet, own a reader, or own three or more computers. By this definition in 2011 44.4 percent of Internet users in Britain were Next Generation Users. The distinction between Next and First Generation Users is significant for several reasons. Next Generation Users are not evenly distributed, but have higher incomes, indicating a new digital divide in Britain. Next Generation Users are also more likely to be producers of content on the Internet, to engage in entertainment and leisure activities online, and are more likely to go to the Internet first for all kinds of information.

The second major transformation has occurred in the use of social networking sites. This represents the single largest increase in Internet use in the last two years. Sixty percent of British Internet users use online social networking sites, up from 49 percent in 2009 and 17 percent in 2007. Among people under age 25 the use of these sites has stabilized at around 90 percent. Thus, almost all the growth in social networking since 2009 has been among people aged 25-55.

Other significant developments in Internet access and use in 2011 include:

- Mobile phones have become virtually universal and nearly half (49 percent) of owners used them to access the Internet. In addition, almost one-third of Internet users had a reader or a tablet.
- The gender divide with respect to Internet adoption has effectively disappeared. However, there are still clear differences in attitudes and use. Men and women were only separated by two percentage points (74 percent of British men are Internet users vs. 72 percent women), down from nine percentage points in 2003 (64 percent men vs. 55 percent women). Women participated in social networking more than men (63 percent of female Internet users vs. 57 percent of male Internet users).
- People continue to turn first to the Internet when looking for professional and personal information. Users consider the Internet a more reliable source of information than television, radio, or newspapers.
- Use of online government services overall has been rising steadily since 2005 (57 percent of British Internet users reported having used at least one online government service in 2011 vs. 39 percent in 2005), but use of specific services remains remarkably low (20 percent on average).

- The proportion of users employing the Internet to obtain services, from online shopping and banking to government services, is still steadily increasing.
- A significant increase in the proportion of users engaging in the creation and production of content online has been observed (e.g., 53 percent of users post photos, up from 44 percent in 2009).
- Finally, the divide between users and non-users persists with 27 percent of British people not using the Internet. There is no single stated reason for not using the Internet. Cost, access, interest, and skills are all important; their relative importance varies depending on the situation of the non-user. In addition, proxy use remains a very important link to the Internet for non-users: 44 percent of non-users “definitely know” someone they could ask for help with the Internet.

# FINDINGS

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1

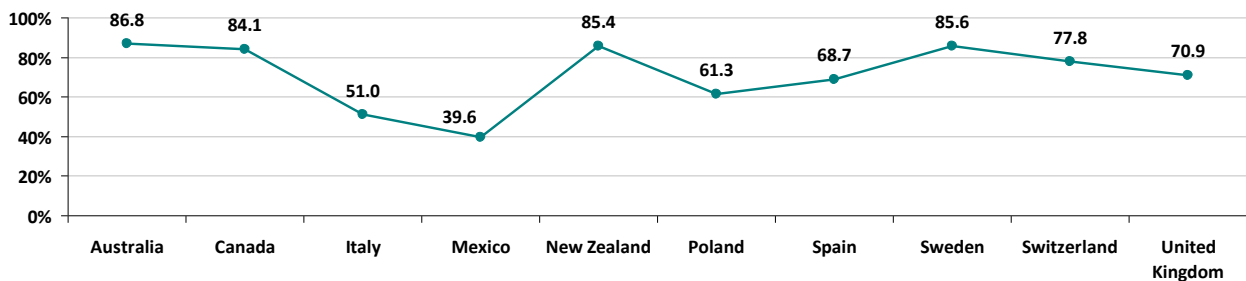
**Internet Use  
and Non-Use**

## 1.1 Internet Penetration in the World Internet Project Countries

### Overall Internet Use

In nine of the ten countries (all except Mexico) with data for this item in the current World Internet Project (WIP) Report, a majority of respondents were Internet users.

Among the nine countries, Australia (86.8 percent), Sweden (85.6 percent), New Zealand (85.4 percent), and Canada (84.1 percent) all reported having a penetration rate more than 80 percent.



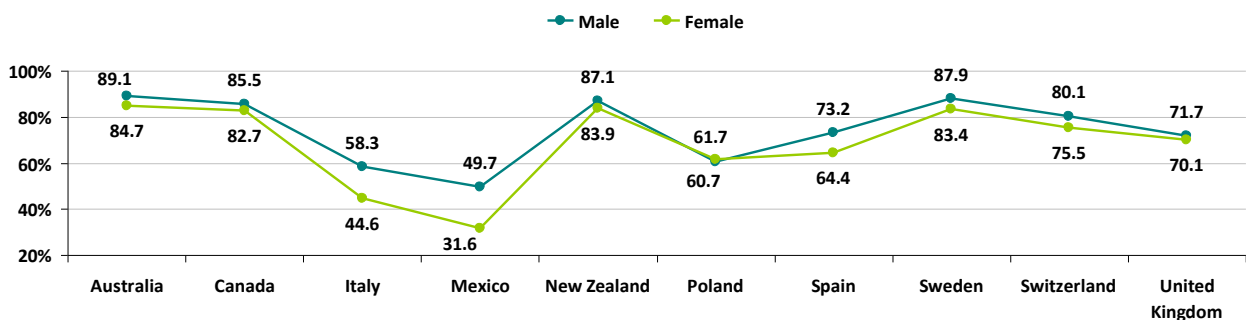
Q3 | All Respondents

### Internet Use among Men and Women

There is some gender disparity in Internet use in most reporting countries, with a higher percentage of male than female users (except for Poland).

The gender gap is the largest in Mexico (18 percent more men than women use the Internet), followed by Italy where close to 14 percent more men than women use the Internet.

However, in Australia, Canada, New Zealand, Poland, Sweden, Switzerland, and the United Kingdom, the gap in Internet use between men and women is five percentage points or less.



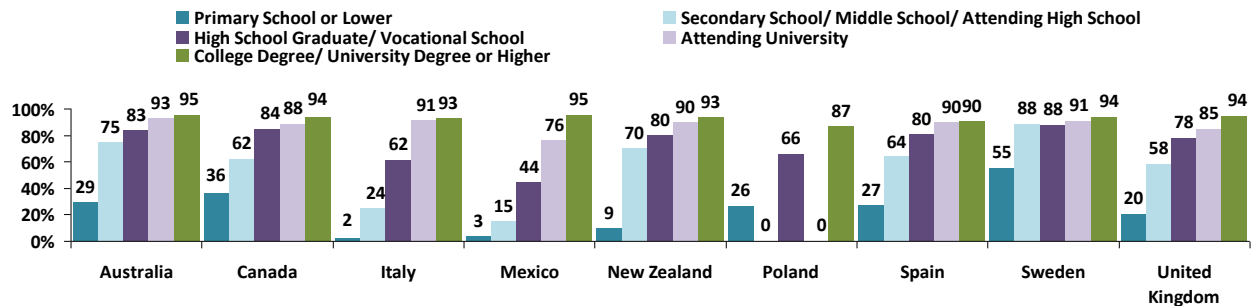
Q3 | All Respondents

## Internet Use and Education Levels

Internet use increases at higher education levels in all WIP countries.

In most WIP countries, the Internet penetration rate among respondents with a primary school education or lower is less than 30 percent. Sweden and Canada are two exceptions. In Sweden, 55 percent of respondents with a primary school education or lower use the Internet, followed by Canada where it is 36 percent.

Internet use is relatively high among respondents with a high school education--62 percent or higher in all WIP countries, except for Mexico. Among respondents with a college degree or higher, the Internet penetration rate is more than 90 percent in all WIP countries, except Poland.



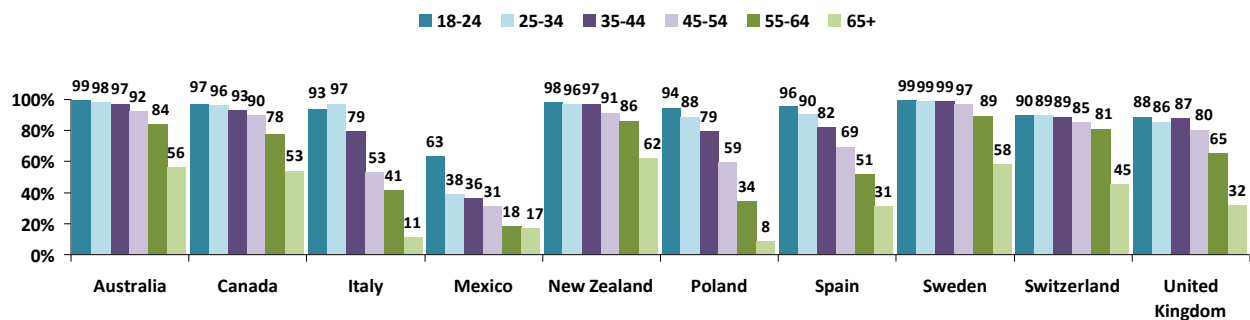
Q3 | All Respondents

## Internet Use by Age

Data from all WIP countries indicate a generally inverse relationship between Internet use and age. In general, Internet use increases as age decreases.

In all WIP countries, high percentages of respondents under age 24 use the Internet; all of the countries except Mexico report an Internet penetration rate of 88 percent or higher among adults between 18 and 24 years of age. Australia, New Zealand, and Sweden have close to universal adoption of the Internet within this age group.

The WIP countries also reported continued low percentages of use among older respondents. Only four countries reported a penetration rate of more than 50 percent among respondents aged 65 or older: New Zealand (62 percent), Sweden (58 percent), Australia (56 percent), and Canada (53 percent).

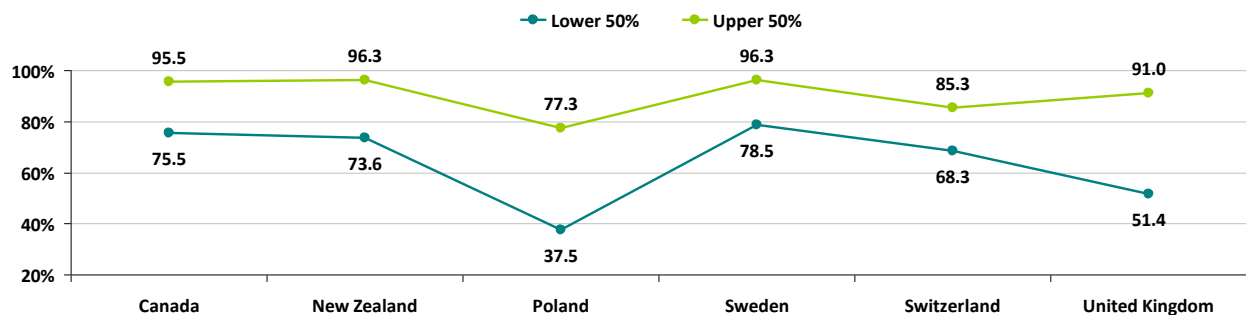


Q3 | All Respondents

## Internet Use and Income Level

Disparity in Internet adoption also exists across income levels. There is typically a wide gap in Internet use between respondents in the upper 50 percent of household income versus the lower 50 percent.

The largest difference can be found in Poland (40 percent gap) and United Kingdom (40 percent gap). The smallest gaps are in Switzerland (17 percent) and Sweden (18 percent).

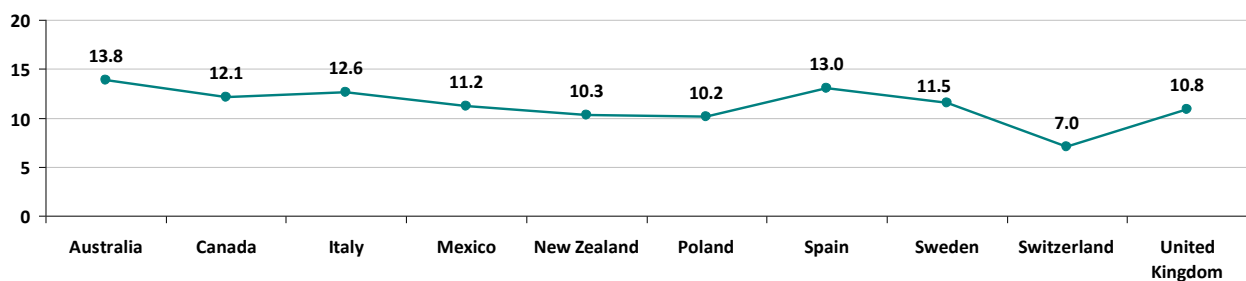


Q3 | All Respondents

## 1.2 Internet Use: At Home, Work, School, and Other Locations

### Internet Use at Home

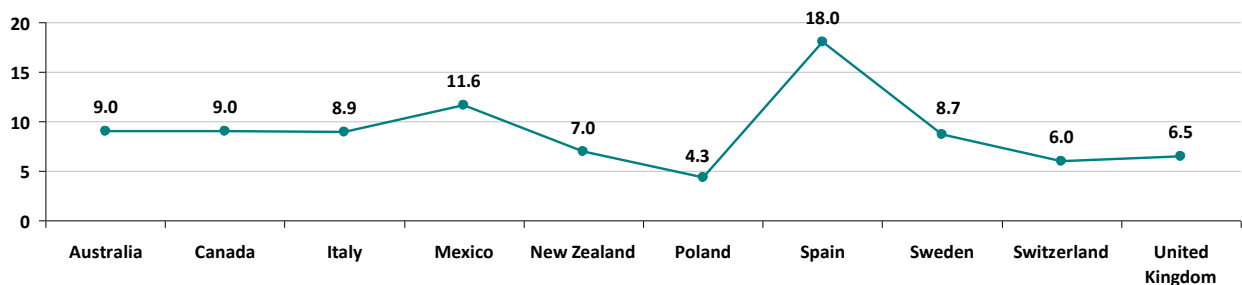
All of the WIP countries reported at least ten hours per week of Internet use at home, except Switzerland. Internet users in Spain accessed the Internet 13 hours a week at home, and in Australia that number was 13.8 hours, the highest among all WIP countries.



Q5 | Internet Users

### Internet Use at Work

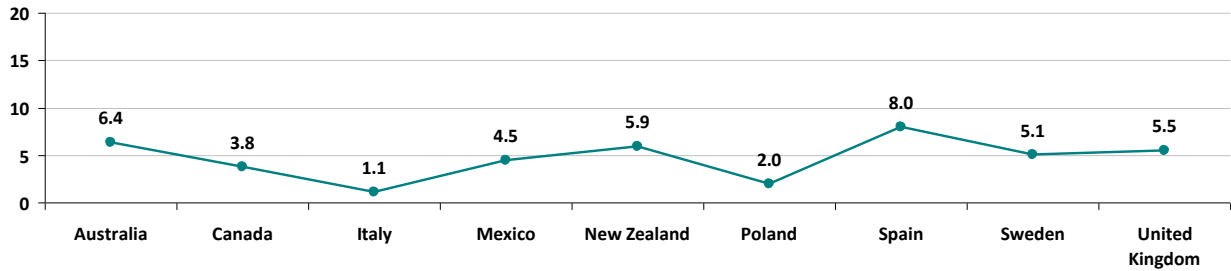
Internet users who were employed in Spain used the Internet an average of 18 hours per week at work, the highest number of hours among all WIP countries, followed by Mexico at 11.6 hours. Users in Poland reported the lowest level of at-work use with 4.3 hours per week.



Q5 | Internet Users who are employed

## Internet Use at School

Students in Spain spent an average of eight hours per week online at school, followed by those in Australia, who averaged 6.4 hours per week. On the other end of the spectrum, students in Italy spent just above one hour a week online at school.

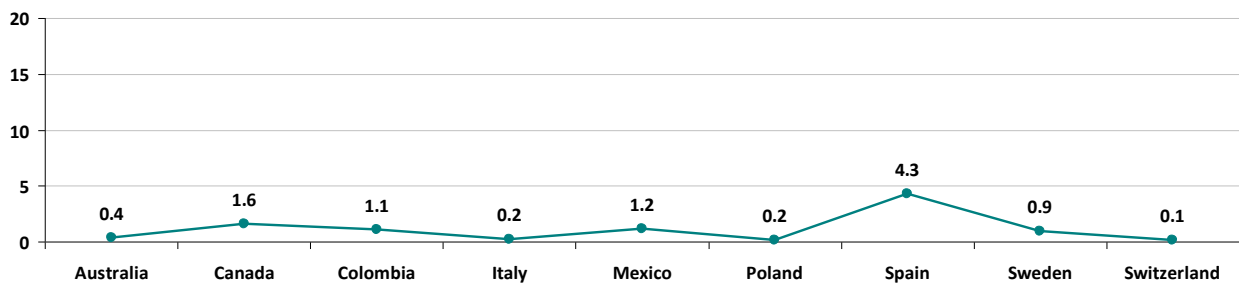


Q 5 | Students who are not employed

## Internet Use from Other Locations

Internet use in locations other than home, school, or work is generally low—under one hour per week on average in five of the reporting countries.

Spain's 4.3 hours per week is the highest among all WIP countries. In contrast, Switzerland reported an average of 6 minutes, and both Italy and Poland reported 12 minutes per week of Internet access in locations other than home, school, or work.



Q5 | Internet Users



### 1.3 Wireless Internet: Access and Usage

Wireless Internet through handheld devices has yet to be widely adopted in the WIP countries. Only the United Kingdom (40.6 percent), Sweden (42.1 percent), and Australia (42.9 percent) have 40 percent or more of Internet users who went online through wireless handheld devices.

In Poland, only 9.4 percent of Internet users accessed the Internet through a wireless handheld device.

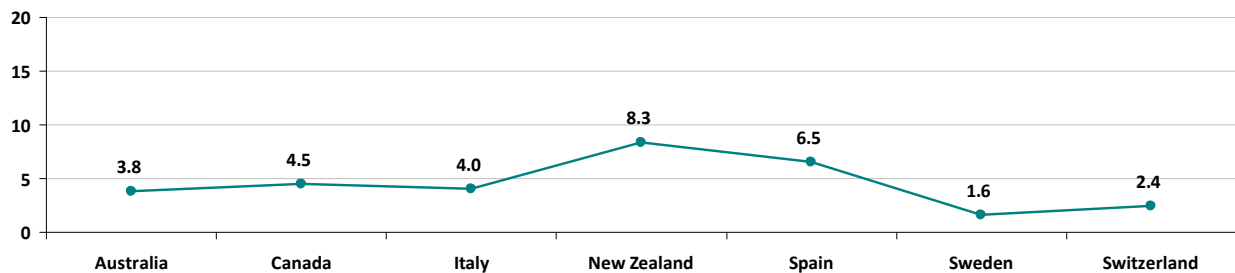


Q6 | Internet Users

#### Internet Access by Wireless Handheld Devices: Hours per Week

Time spent accessing the Internet through wireless handheld devices is still generally low in the WIP countries.

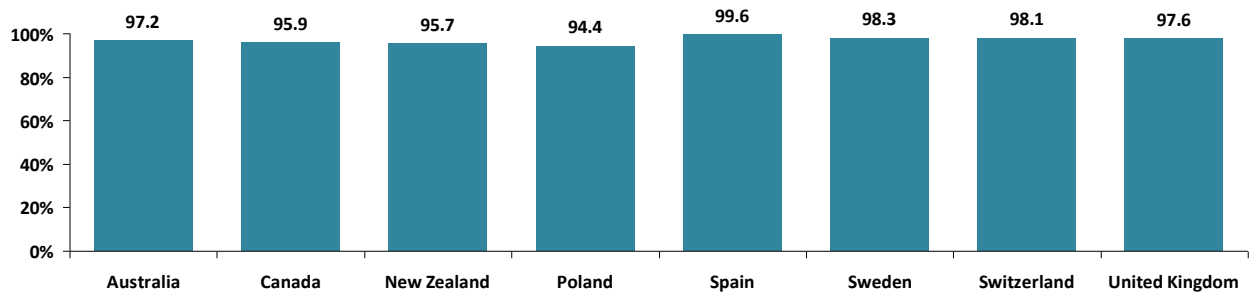
New Zealand (8.3 hours) reported the highest average weekly hours of Internet access by wireless handheld devices, while Sweden reported the lowest at 1.6 hours.



Q6 | Those who use the Internet through wireless handheld devices

## 1.4 Internet Connections at Home

More than 94 percent of Internet users in the WIP reporting countries have Internet access at home. Spain has close to universal home Internet access among its Internet users.

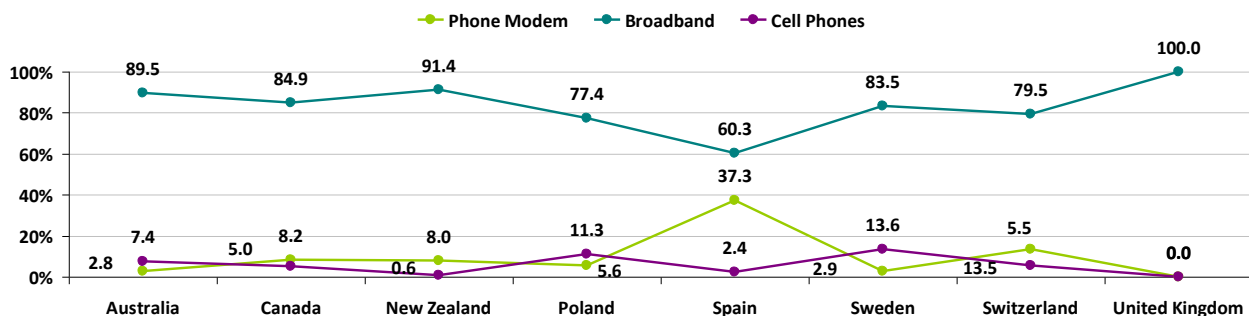


Q18A | Internet Users

### Connection Types at Home

The type of Internet connection used at home varies across the WIP countries. In the U.K., nearly all Internet users enjoy broadband. More than 80 percent of the Internet users in Sweden (83.5 percent), Canada (84.9 percent), Australia (89.5 percent), and New Zealand (91.4 percent) have broadband at home.

On the other hand, 13.5 percent and 37.3 percent of Internet users in Switzerland and Spain, respectively, still access the Internet at home through a phone modem. Internet access by cell phone from home is used by small percentages of users. Countries reporting that at least 10 percent of Internet users go online through cell phones at home are Poland (11.3 percent) and Sweden (13.6 percent).

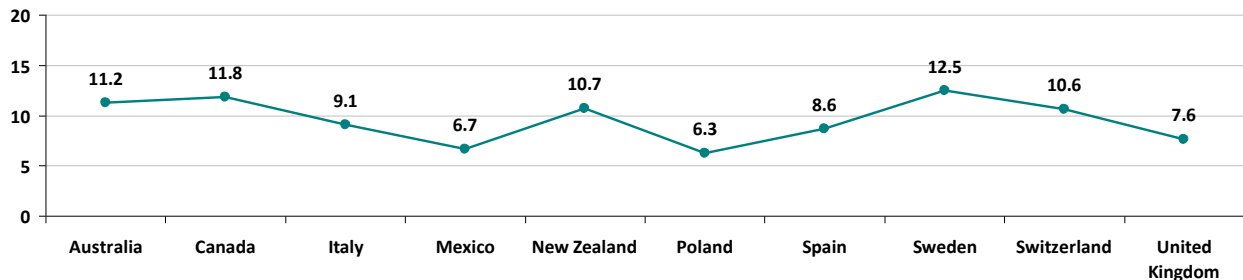


Q18B | Internet Users

## 1.5 Years Online

Internet experience is extensive in the WIP countries. Users in Sweden reported the most years online—an average of 12.5 years. Users in Switzerland (10.6 years), New Zealand (10.7 years), Australia (11.2 years), and Canada (11.8 years) all reported more than 10 years of average online experience.

All other WIP countries reported less than 10 years average online.



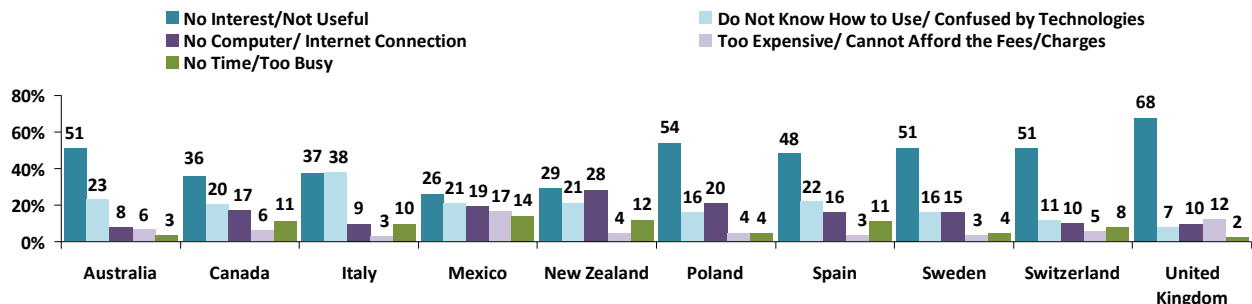
Q7 | Internet Users

## 1.6 Internet Non-Users: Reasons for Not Going Online

Why are some people not online? In nine out of the ten WIP countries (all except for Italy) with data for this item, “no interest/not useful” was the primary reason cited by non-users. In the U.K., it was the most important reason given by 68 percent of the non-users; and in Australia (51 percent), Sweden (51 percent), Switzerland (51 percent), and Poland (54 percent) it was the primary reason for more than 50 percent of the non-users.

Lack of knowledge about how to use the Internet or being confused by the technology was the second most important reason for not going online in most WIP countries, except New Zealand, Poland, and the U.K. It was cited by 20 percent or more of non-users in Canada (20 percent), Mexico (21 percent), Spain (22 percent), and Australia (23 percent).

The cost of Internet service was not a significant factor for non-use in most of the WIP countries. In all WIP countries except the U.K. and Mexico, 6 percent or less of the non-users cited cost as a reason for not using the Internet. It was a bigger concern in the U.K. and Mexico where 12 percent and 17 percent of non-users, respectively, reported cost as a factor for not going online.



Q4 | Internet Non-Users

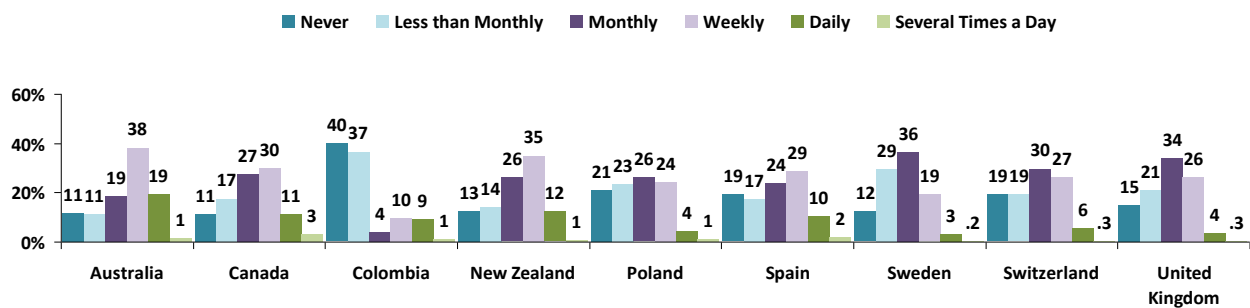
## 2 | Information Seeking Online

## 2.1 Searching for Product, Travel, and Health Information

### Product Information

High percentages of users in most of the reporting countries go online to get product information.

In four of the reporting WIP countries, more than 40 percent of users go online at least weekly to look for information about a product: Australia (58 percent), Canada (44 percent), New Zealand (48 percent), and Spain (41 percent). Forty percent of Internet users in Colombia never go online to search for product information.

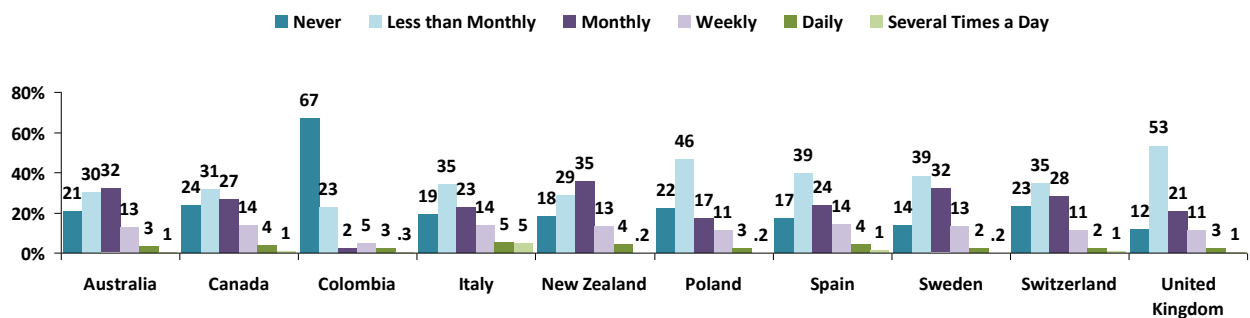


Q22A | Internet Users

### Travel Information

Substantial percentages of Internet users in most of the WIP countries go online at least monthly to look for travel information. In seven of the ten reporting countries with data on this item, 42 percent or more of the Internet users go online for that purpose at least monthly: Switzerland (42 percent), Spain (43 percent), Canada (46 percent), Italy (47 percent), Sweden (47 percent), Australia (49 percent), and New Zealand (52 percent).

Conversely, high percentages of Internet users in three countries go online to search for travel information less than monthly or never: U.K. (65 percent), Poland (68 percent), and Colombia (90 percent). In Colombia 67 percent of Internet users never go online to look for travel information.



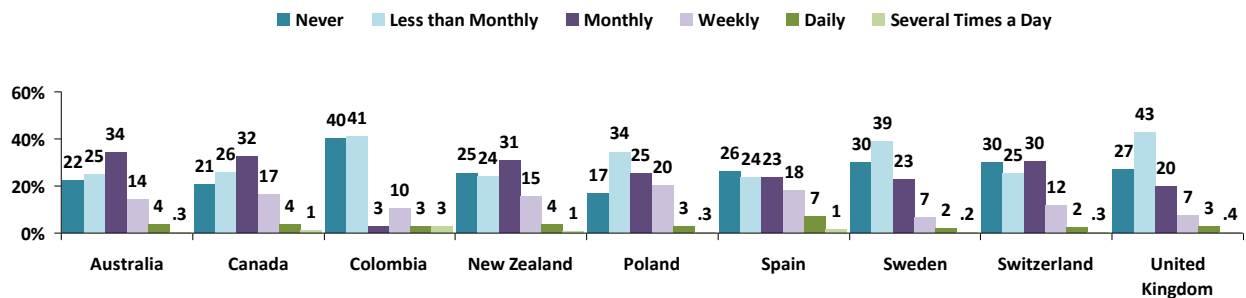
Q20B | Internet Users

## Health Information

Large percentages of users access online information about health issues in most of the WIP countries. In all WIP countries except Colombia, 30 percent or more of Internet users do so at least monthly.

In five of the nine reporting countries with data for this item, 45 percent or more of Internet users go online to search for health information at least monthly: Poland (48 percent), New Zealand (51 percent), Spain (49 percent), Australia (52 percent), and Canada (54 percent).

Using the Internet to look for health information at least monthly is particularly low in Colombia (19 percent). A high percentage of Internet users in Colombia never use the internet in this way (40 percent).

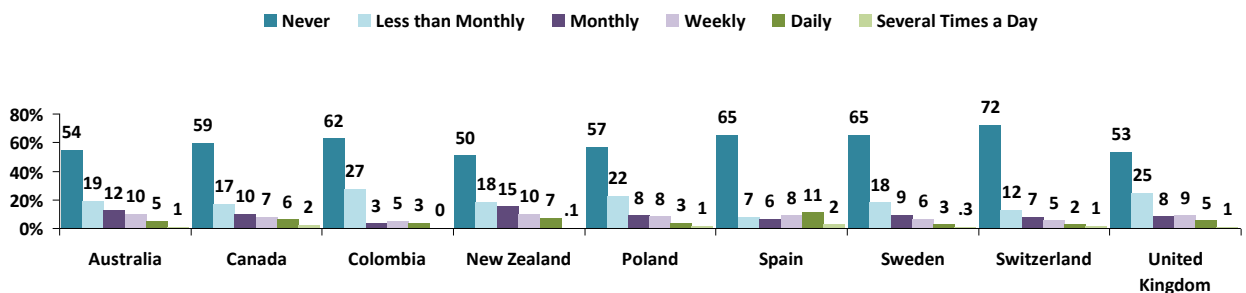


Q20F | Internet Users

## 2.2 Internet Use to Look for Jobs or Work

As one would expect given the nature of the activity, Internet users in the WIP countries go online to search for jobs less frequently. In all countries except New Zealand, 28 percent or less of Internet users search for jobs online monthly or more often, and in Colombia only 11 percent of Internet users do so monthly or more often.

A majority of Internet users in all WIP countries never access the Internet to look for jobs or work. At the extreme, in Switzerland 72 percent of Internet users never do it.



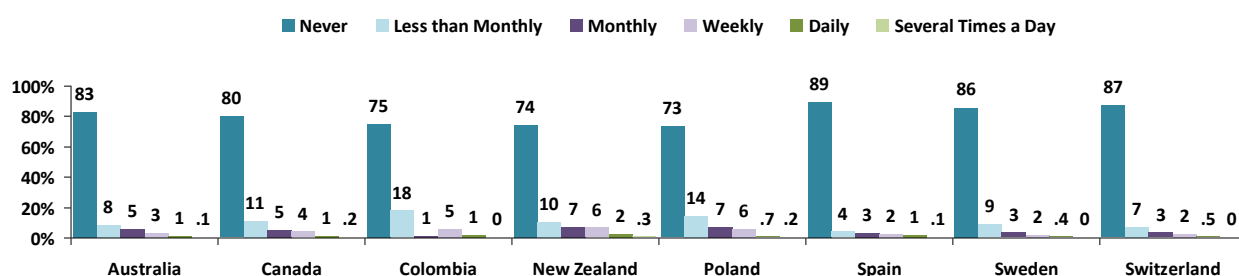
Q20C | Internet Users

## 2.3 Visiting Religious or Spiritual Websites

Very small percentages of users visit religious or spiritual websites.

In all of the WIP countries except Poland, New Zealand, and Colombia, at least 80 percent of Internet users never go online to look at religious or spiritual websites. Among them, Spain has the highest percentage of Internet users who never do that --89 percent.

Poland has the highest percentage of Internet users (28 percent) who visit religious or spiritual websites less than monthly, followed by both New Zealand's and Colombia's 25 percent.



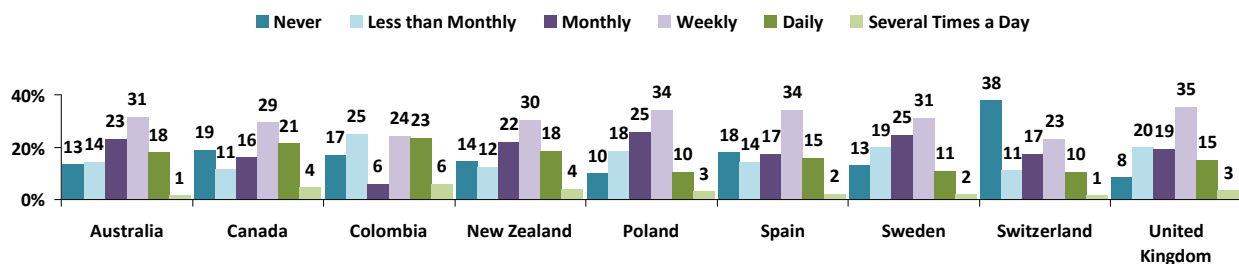
Q21D | Internet Users

## 2.4 Finding or Checking a Fact

High percentages of Internet users go online to find or check facts on a regular basis.

Forty-three percent or more of users in all WIP countries except Switzerland go online at least weekly for fact finding or checking. A majority of Internet users in six of the nine reporting countries do it at least weekly: Australia (50 percent), Spain (51 percent), New Zealand (52 percent), Colombia (53 percent), U.K. (53 percent), and Canada (54 percent).

Thirty-eight percent of Internet users in Switzerland never go online to find or check facts, the highest among all WIP countries.



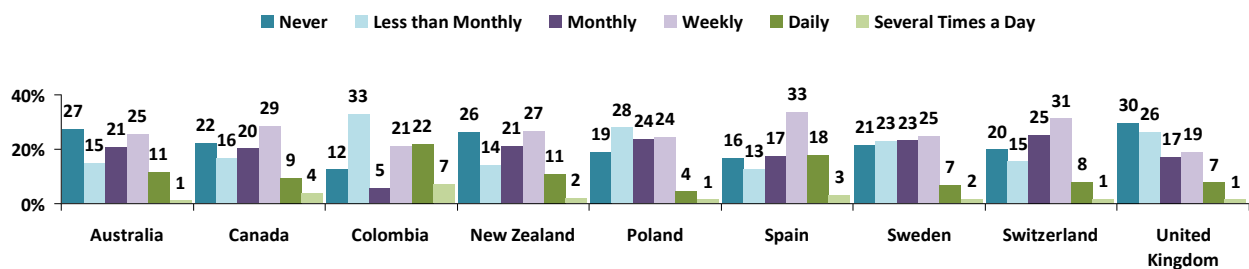
Q23B | Internet Users

## 2.5 Looking up the Definition of a Word

Large percentages of users go online to look up the definition of a word on a regular basis.

Thirty percent or more of users in all of the WIP countries except the U.K. and Poland go online at least weekly to look up a word. Among all WIP countries, Colombia (50 percent) and Spain (54 percent) have the highest percentages of Internet users who do this weekly or more often.

Thirty percent of Internet users in the U.K. never go online to look up the definition of a word, the highest percentage in all of the WIP countries.



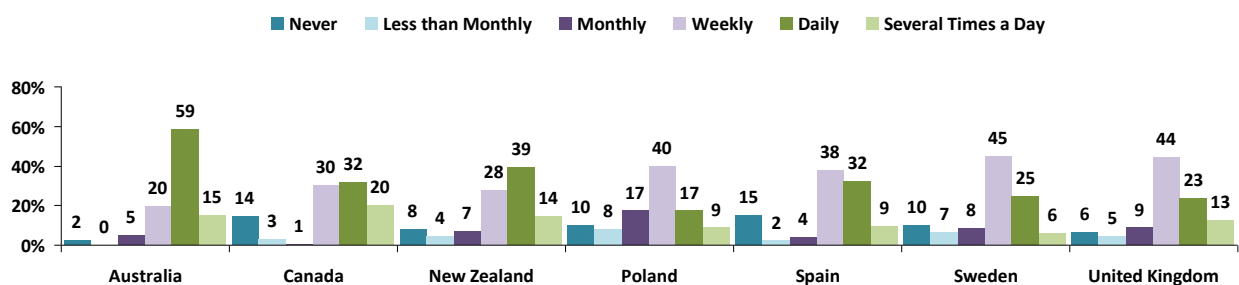
Q23A | Internet Users

## 2.6 Internet Use for School-Related Work

Using the Internet for school-related work is a popular online activity among student users.

In all WIP countries except Poland, at least 75 percent of student users access the Internet for school-related work weekly or more often: Sweden (76 percent), Spain (79 percent), U.K. (80 percent), New Zealand (81 percent), Canada (82 percent), and Australia (94 percent).

At the extreme, in Australia 74 percent of student users go online for information on school-related work at least daily, and in Canada 20 percent of student users do it several times a day.



Q23C | Student Users Who are Not Employed

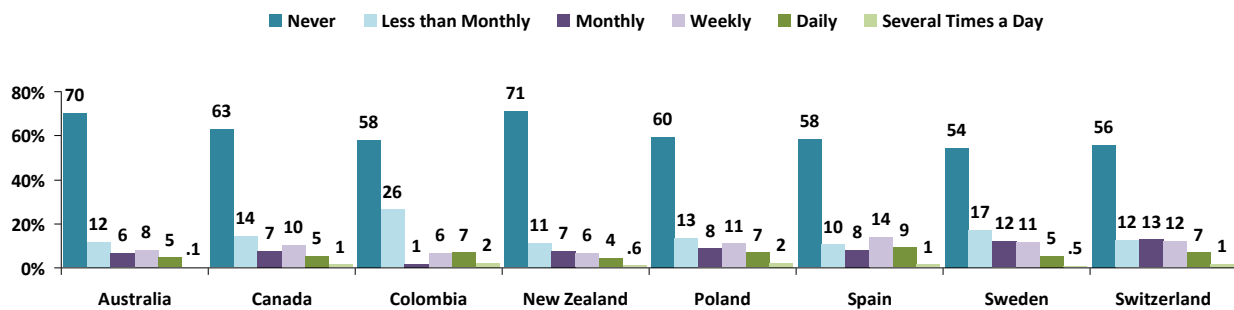


## 3 | Access to Online Services

### 3.1 Online Radio

Listening to radio online is not a very popular activity among Internet users in the WIP countries. In New Zealand 71 percent of Internet users never listen to online radio, followed by Australia at 70 percent.

Switzerland has the highest percentage of users listening to online radio at least monthly – 33 percent. In all other WIP countries except Spain (at 32 percent), less than 30 percent of users listen at least monthly.

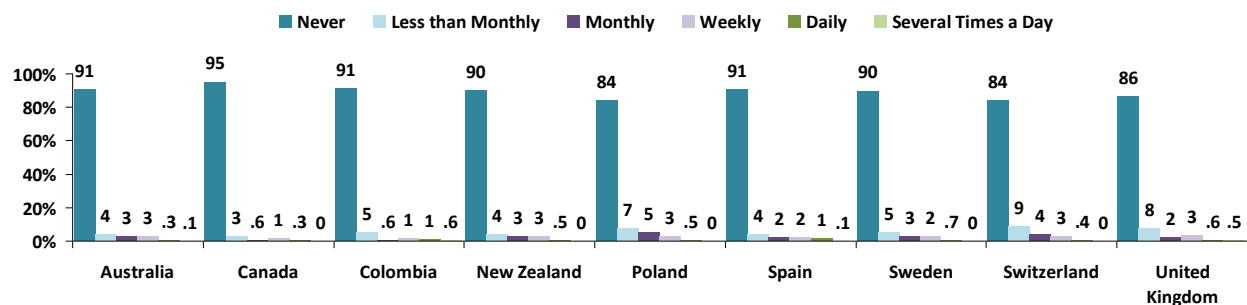


Q21E | Internet Users

### 3.2 Betting Online

The Internet is rarely used to bet, gamble, or enter sweepstakes by Internet users in the WIP countries. In most WIP countries, 90 percent or more of users never engage in these online activities; in Canada it is 95 percent.

The largest percentage of users who bet, gamble, or enter sweepstakes at least monthly was reported in Poland (9 percent).

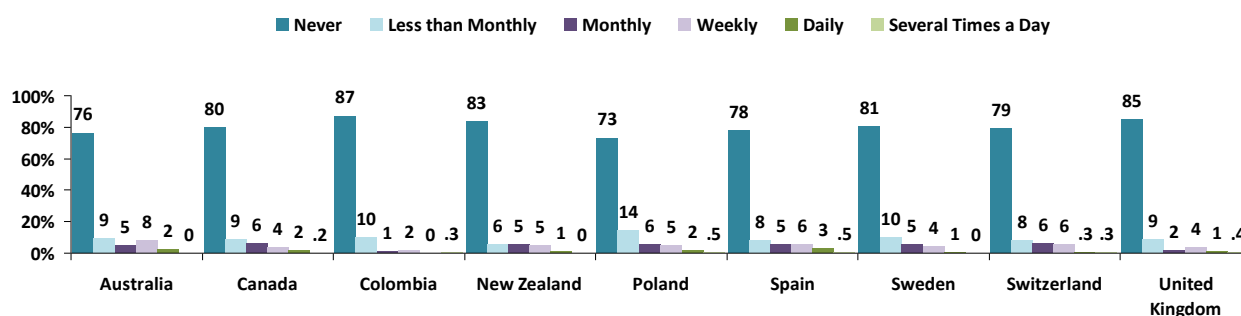


Q21F | Internet Users

### 3.3 Sexual Content

In five of the nine reporting WIP countries with data for this item, 80 percent or more of Internet users say that they never look at websites with sexual content: Canada (80 percent), Sweden (81 percent), New Zealand (83 percent), U.K. (85 percent), and Colombia (87 percent).

In Australia and Spain 10 percent of users go online at least weekly to look for sexual content, the highest among all the WIP countries.

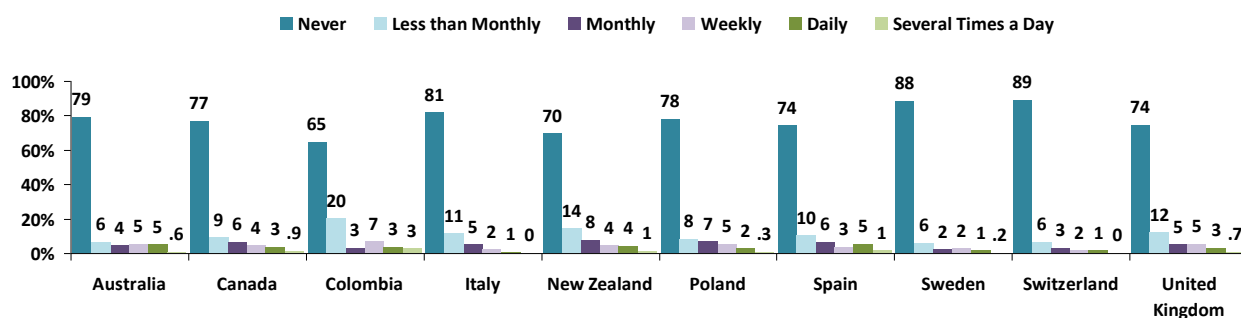


Q21H | Internet Users

### 3.4 Distance Learning

Small percentages of Internet users in the WIP countries go online to participate in distance learning for job training or an academic degree. New Zealand (17 percent), Spain (15 percent), Australia (15 percent), and Colombia (16 percent) have the highest percentages of participation in distance learning at least monthly among the WIP countries.

Close to two-thirds of Internet users in all of the WIP countries never participate in distance learning for an academic degree or job training. In Sweden and Switzerland that percentage is close to 90 percent.

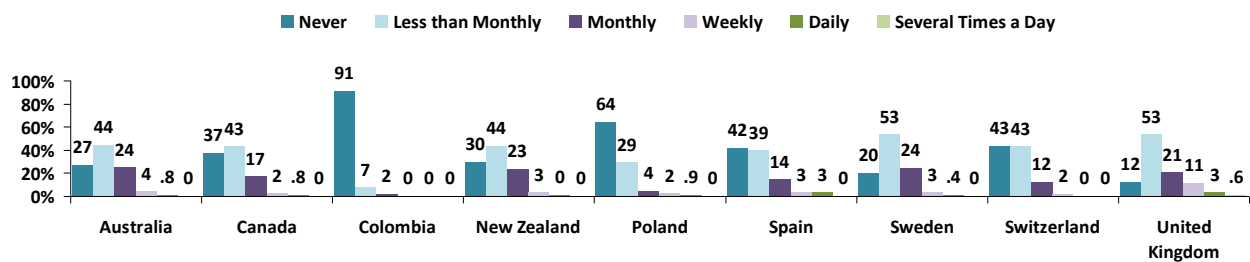


Q23D | Internet Users

### 3.5 Travel Reservations or Bookings

Although making travel reservations is not done frequently by most people, high percentages of users in most WIP countries go online at least monthly to engage in this activity. In six of the nine WIP countries 20 percent or more of Internet users make online travel reservations or bookings at least monthly: Canada (20 percent), Spain (20 percent), New Zealand (26 percent), Sweden (27 percent), Australia (29 percent), and the U.K. (36 percent).

In Colombia and Poland only 2 percent and 7 percent of Internet users, respectively, do it at least monthly, and 91 percent of users in Colombia never go online to make travel reservations or bookings.



Q22C | Internet Users

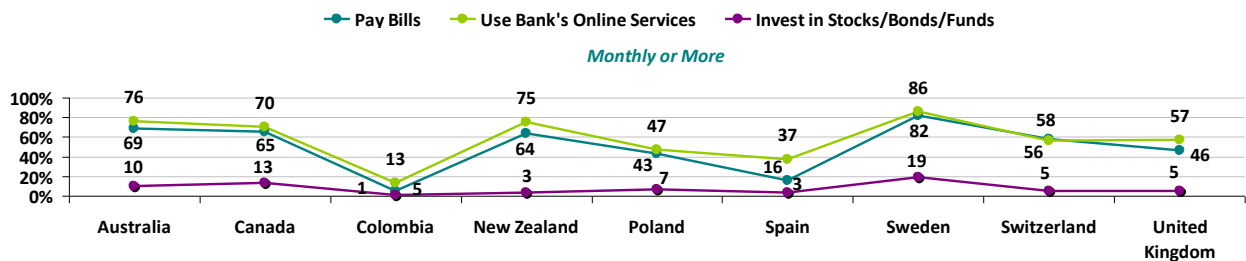
### 3.6 Online Financial Transactions

With financial services and transactions moving online, the World Internet Project explores the use of online bill payment, online banking, and online investing among Internet users in the different countries.

Online bill payment continues to be common in Sweden; 82 percent (compared with 78 percent in the last WIP report) of users reported going online to pay bills at least monthly (a typical bill paying cycle). Four other WIP countries reported a majority of users paying bills online at least monthly: Switzerland (58 percent), New Zealand (64 percent), Canada (65 percent), and Australia (69 percent).

In all of the WIP countries a higher percentage of Internet users accesses online banking services than makes online payments at least monthly. In six of the nine countries with data for this item, a majority of users goes online for banking services at least monthly: Switzerland (57 percent), U.K. (58 percent), Canada (71 percent), New Zealand (75 percent), Australia (76 percent), and Sweden (86 percent).

Online investing has been adopted by very small percentages of users in the WIP countries. Only three countries have at least 10 percent of Internet users who go online to invest in stocks, bonds, or funds at least monthly: Australia (10 percent), Canada (13 percent), and Sweden (19 percent).



Q22DEF | Internet Users

## 4 | The Internet and Social Connections

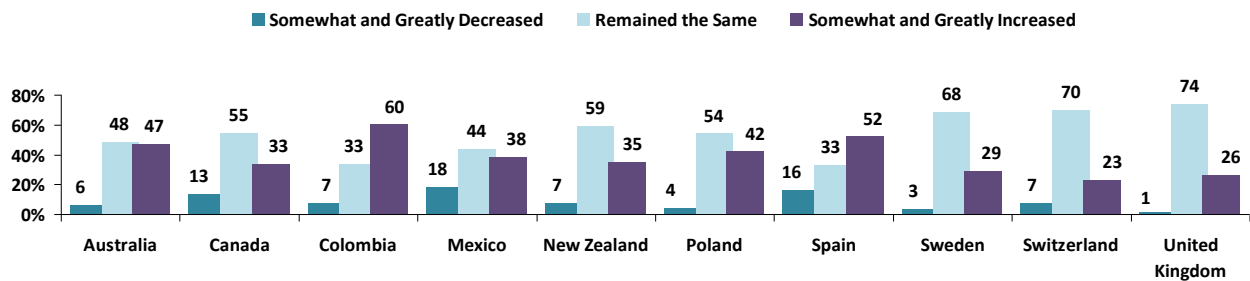
## 4.1 Internet Use: Social, Political, Religious, and Professional Contact

### Internet Use: Effect on Contact with People Who Share User's Hobbies and Recreational Activities

The Internet has a multi-dimensional impact on people's social lives. Findings from the WIP countries offer a snapshot of such impact on users' contact with people in their social, political, religious, and professional circles.

Internet use has a positive impact on the social interaction of Internet users; in all WIP countries relatively high percentages of users believe that going online has somewhat or greatly increased their contact with people who share their hobbies or recreational activities. In four of the ten countries with data for this item, more than 40 percent of users reported such an increase: Poland (42 percent), Australia (47 percent), Spain (52 percent), and Colombia (60 percent).

Much lower percentages of Internet users think that going online has somewhat or greatly decreased their contact with those people. In seven of the ten countries with data for this item, less than 10 percent of Internet users hold such a view, with the lowest percentages in the U.K. (1 percent), Sweden (3 percent), and Poland (4 percent).



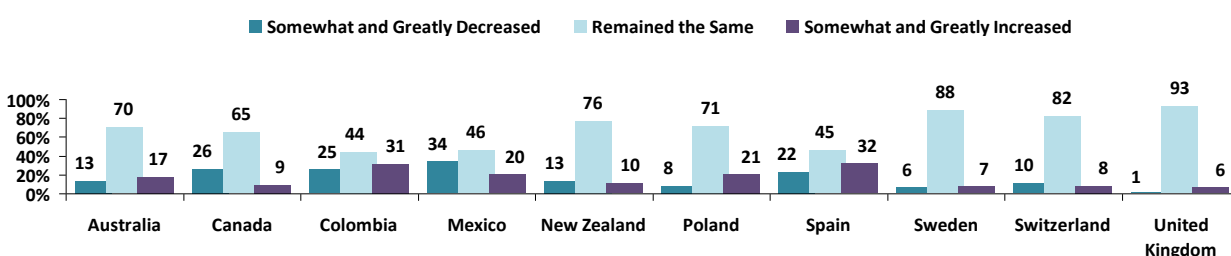
Q9A | Internet Users

## Internet Use: Effect on Contact with People Who Share User's Political Views

Generally, relatively low percentages of users reported that the Internet has increased their contact with people who share their political views. Mexico, Poland, Colombia, and Spain are the only countries where more than 20 percent of users reported an increase as a result of Internet use.

Notably, in Canada and Mexico appreciably (and in New Zealand and Switzerland narrowly) higher percentages of users said that Internet use has decreased rather than increased their contact with those who share their political views.

Large percentages of users said the Internet has no impact on their contact with people who share their political views. The highest percentages were reported in the U.K. (93 percent), Sweden (88 percent), and Switzerland (82 percent).

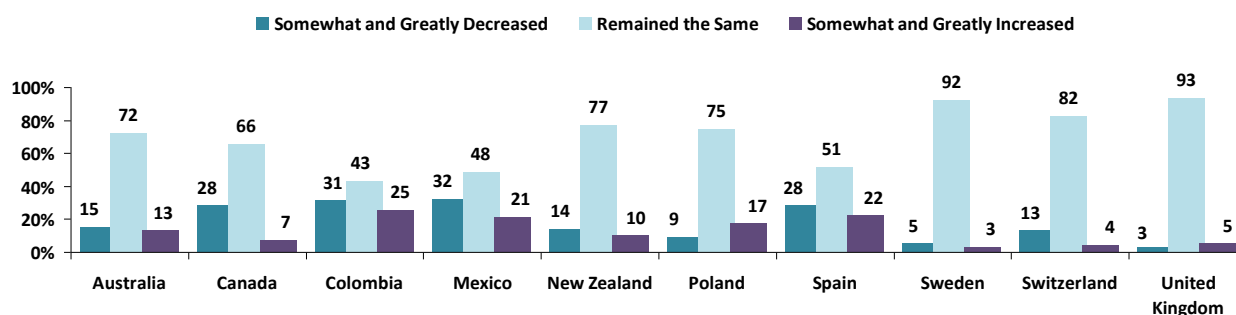


Q9B | Internet Users

## Internet Use: Effect on Contact with People Who Share User's Religious Beliefs

In all of the WIP countries except for Poland, Sweden, and the U.K., Internet use has an overall negative perceived impact on people's contact with those who share their religious beliefs. Higher percentages of users in all except for those three countries said that going online has decreased rather than increased such contact.

Relatively small percentages of Internet users in most of the WIP countries said that Internet use has increased their contact with people who share their religious beliefs. Only Mexico (21 percent), Spain (22 percent), and Colombia (25 percent) have more than 20 percent of users who said that Internet use has increased their contact with those sharing their religious beliefs.



Q9C | Internet Users

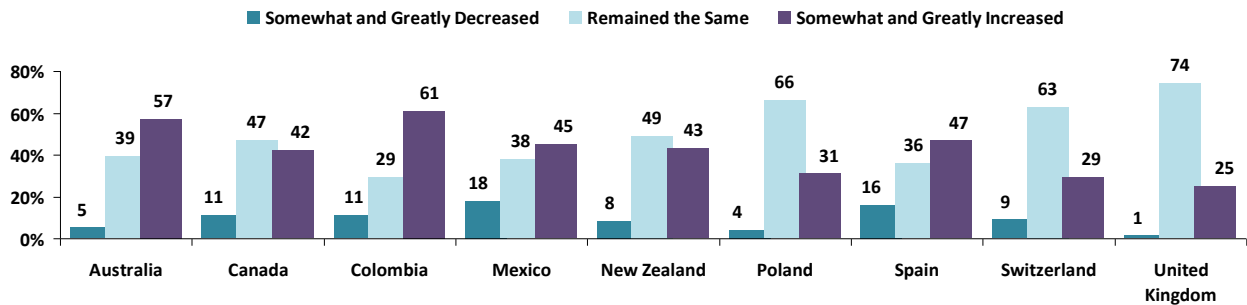


### Internet Use: Effect on Contact with People Who Share User's Profession

Internet use has an overall positive perceived impact on users' contact with those in their profession; higher percentages of users in all WIP countries reported increased as opposed to decreased contact.

In addition, compared to previous types of contacts, higher percentages of users reported that going online has increased their contact with people in their profession. In all the WIP countries, a quarter or more of users reported an increase in their contact with those in their profession. In Australia, 57 percent of Internet users reported an increase, and in Colombia that percentage was 61 percent.

At least 42 percent of Internet users reported increased contact with people in their profession as a result of going online in four other countries: Canada (42 percent), New Zealand (43 percent), Mexico (45 percent), and Spain (47 percent).



Q9F | Internet Users who are employed or retired

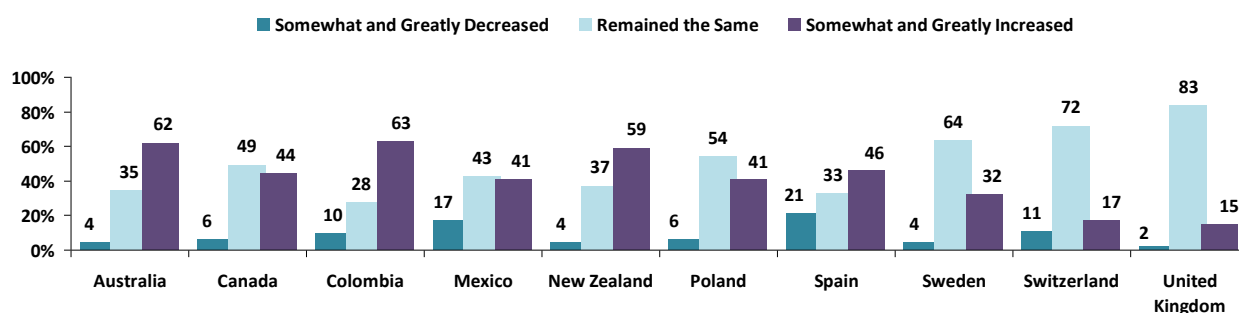
## 4.2 Internet Use: Contact and Socializing with Family and Friends

### Internet Use: Effect on Contact with the User's Family

Use of the Internet also exerts a positive impact on users' contact with their family members; in all the WIP countries higher percentages of users reported increased as opposed to decreased contact as a result of Internet use.

Seven of the 10 countries with data for this item reported 40 percent or more of Internet users who said that Internet use has increased their contact with family. Among them, more than 60 percent of Internet users in Australia (62 percent) and Colombia (63 percent) reported an increase in such contact as a result of Internet use. Only the U.K. (15 percent), Switzerland (17 percent), and Sweden (32 percent) reported lower than 40 percent for increased contact.

Much lower percentages were reported for decreased contact with family among all the WIP countries.

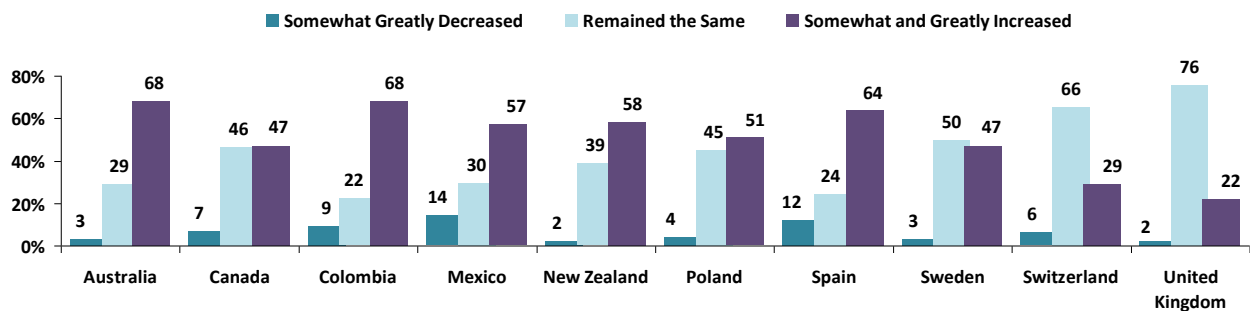


Q9D | Internet Users

## Internet Use: Effect on Contact with the User's Friends

Similar to its impact on contact with family members, Internet use seems to have brought users closer to their friends. In all WIP countries the percentages of users reporting increased contact with friends as a result of Internet use are much higher than those reporting decreased contact. Six of the ten countries with data for this item reported a majority of Internet users engaging in more contact with their friends after going online. In three countries more than 60 percent of users reported such increase: Spain (64 percent), Colombia (68 percent), and Australia (68 percent).

Low percentages of users reported decreased contact with friends in all the WIP countries. Only Spain (12 percent) and Mexico (14 percent) have more than 10 percent of users reporting a decrease.



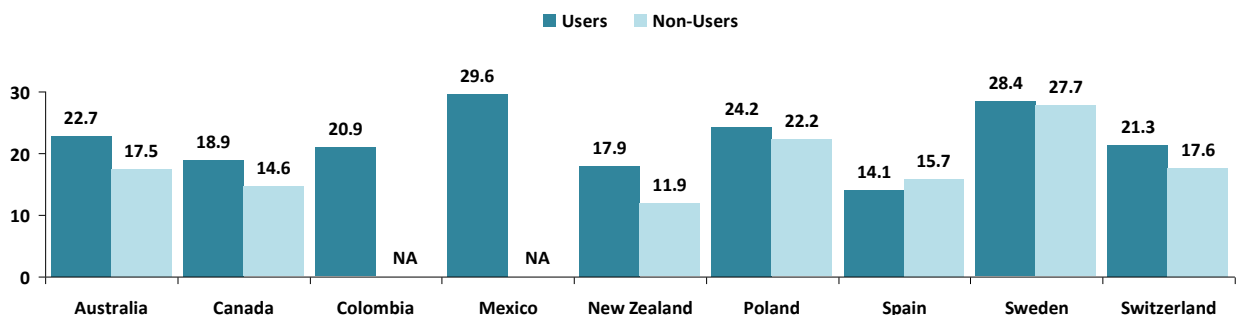
Q9E | Internet Users

## 4.3 Socializing with Family and Friends: Users vs. Non-Users

### Time Spent Socializing Face-to-Face with Family

Internet use does not necessarily take away from the time that users spend with their family. In all reporting countries except for Spain users spend more time socializing with their family than non-users. This finding confirms a previous finding that Internet use has increased users' contact with their family.

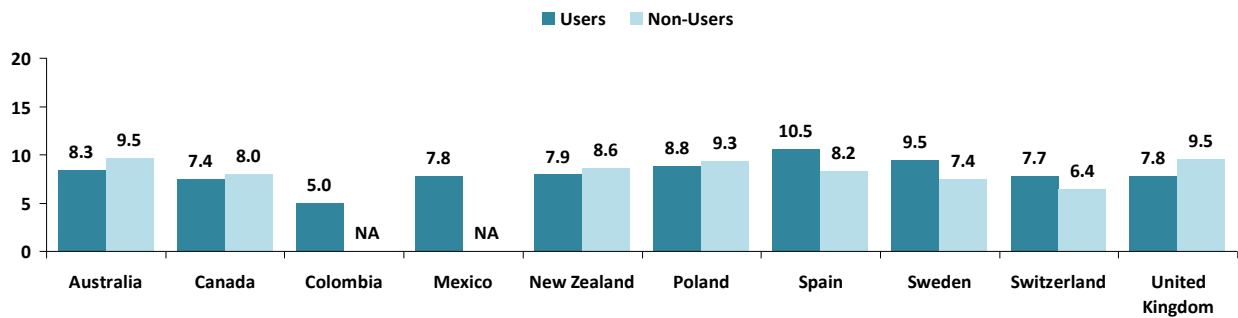
In the countries where data are available for comparison between users and non-users, the biggest gap is found in New Zealand (6 hours per week), and the smallest gap is found in Sweden (0.7 hour per week).



Q16 | All Respondents

## Time Spent Socializing with Friends Outside of School or Outside of Office Hours

There is no clear association between Internet use versus non-use and time spent with friends. In five of the reporting countries non-users spend more time socializing with friends than users. In the other three reporting countries users spend more time with friends. The biggest gaps between users and non-users are found in Spain (users spend 2.3 hours more per week on average socializing with friends than non-users), Sweden (users spend 2.1 hours more per week on average socializing with friends than non-users), and the U.K. (non-users spend 1.7 hours more per week on average socializing with friends than users).



Q15 | All Respondents

## 5 | Politics and the Internet

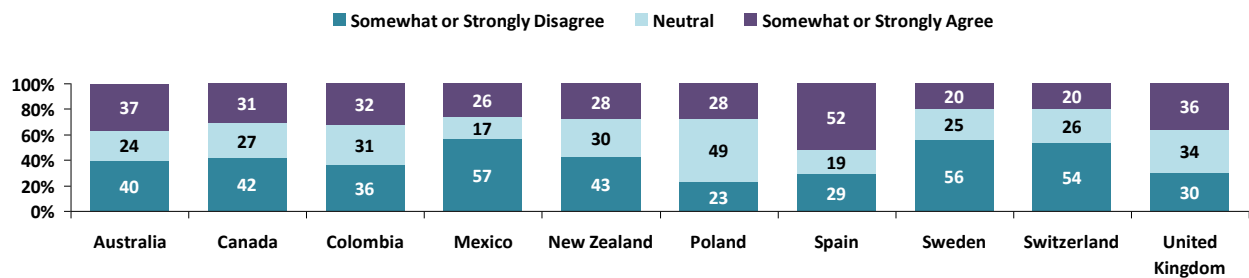
## 5.1 The Internet and the Political Process

One important aspect of the Internet is its impact on the political process. The World Internet Project looks at the impact of the Internet on political empowerment, citizen participation in governance, the understanding of politics, and the engagement of public officials.

### People Can Have More Political Power

In the current study, only in Spain (52 percent) does a majority of Internet users believe that the Internet can give people more political power. Spain is followed by four countries in which 30 percent or more of Internet users support this notion: Canada (31 percent), Colombia (32 percent), U.K. (36 percent), and Australia (37 percent). The lowest percentages of Internet users who agree with this statement are found in Sweden and Switzerland (both at 20 percent).

In six WIP countries, at least 40 percent of users do not agree that the Internet can be used as a tool for political empowerment: Australia (40 percent), Canada (42 percent), New Zealand (43 percent), Switzerland (54 percent), Sweden (56 percent), and Mexico (57 percent). In all countries except Poland, Spain, and U.K., higher percentages of users disagree with the statement compared with those who agree with it.

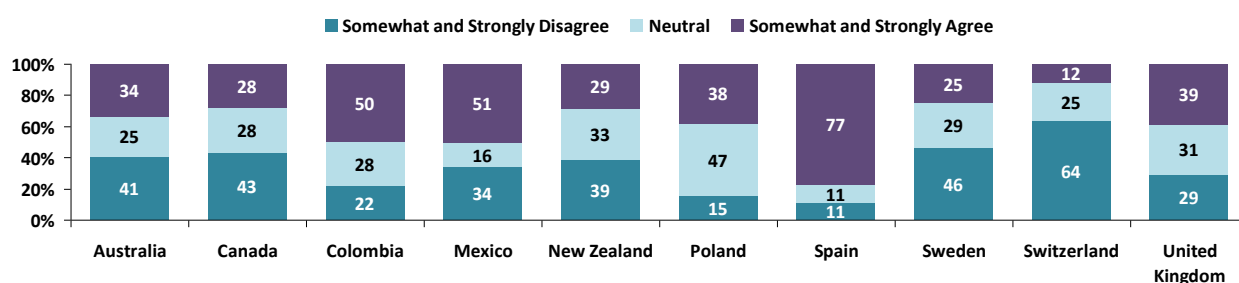


Q10A | Internet Users

## People Will Have More Say about What the Government Does

Only three countries reported 40 percent or more of Internet users who accept that Internet use will grant people more involvement in governance: Colombia (50 percent), Mexico (51 percent), and Spain (77 percent). The lowest percentages of agreement are found in Switzerland (12 percent) and Sweden (25 percent).

Four countries reported 40 percent or more of Internet users who reject the idea that Internet use will grant people more say about what the government does: Australia (41 percent), Canada (43 percent), Sweden (46 percent), and Switzerland (64 percent).

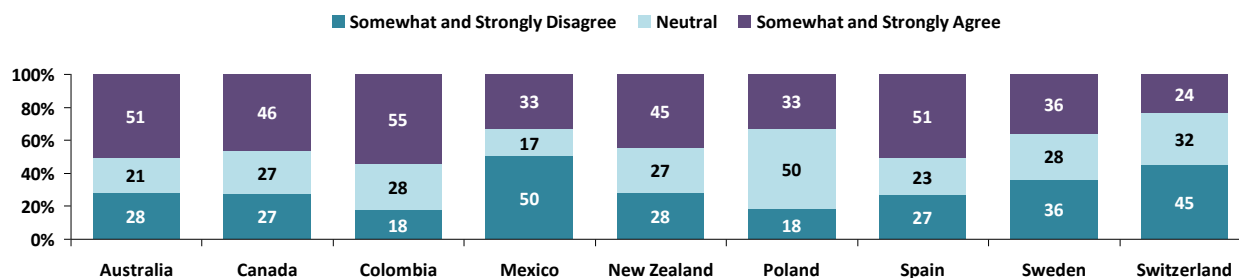


Q10B | Internet Users

## People Can Better Understand Politics

In spite of their doubts about the ideas that Internet use will empower them or give them more participation in the governance process, Internet users tend to have more faith that Internet use will enable people to better understand politics. In five countries, more than 40 percent of Internet users accept that idea: New Zealand (45 percent), Canada (46 percent), Australia (51 percent), Spain (51 percent), and Colombia (55 percent).

Switzerland (45 percent) and Mexico (50 percent) are the only countries where more Internet users do not believe that people can have a better grasp of politics as a result of Internet use.

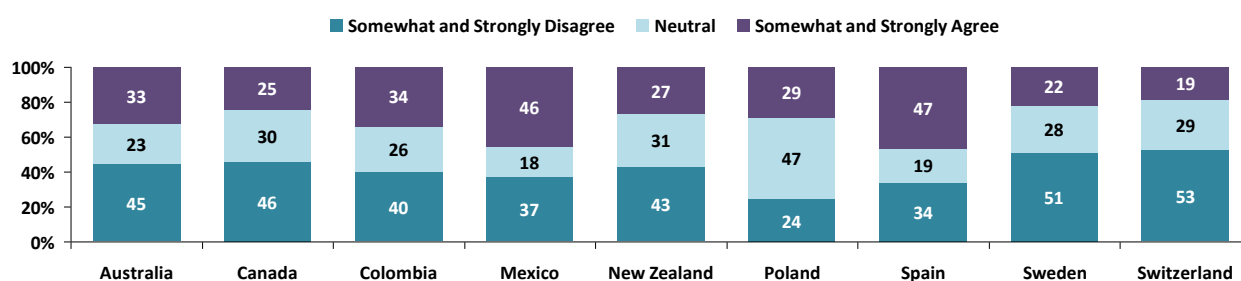


Q10C | Internet Users

## Public Officials Will Care More about What People Think

In general, Internet users are not very confident about the role of the Internet in engaging public officials in people's concerns.

In most of the countries higher percentages of Internet users do not believe that public officials will be more attentive to people's concerns as a result of Internet use compared to those who believe it will lead to such attention. In six of the nine reporting countries with data for this item, 40 percent or more of Internet users reject the idea that Internet use will cause public officials to care more about people's concerns: Colombia (40 percent), New Zealand (43 percent), Australia (45 percent), Canada (46 percent), Sweden (51 percent), and Switzerland (53 percent).



Q10D | Internet Users



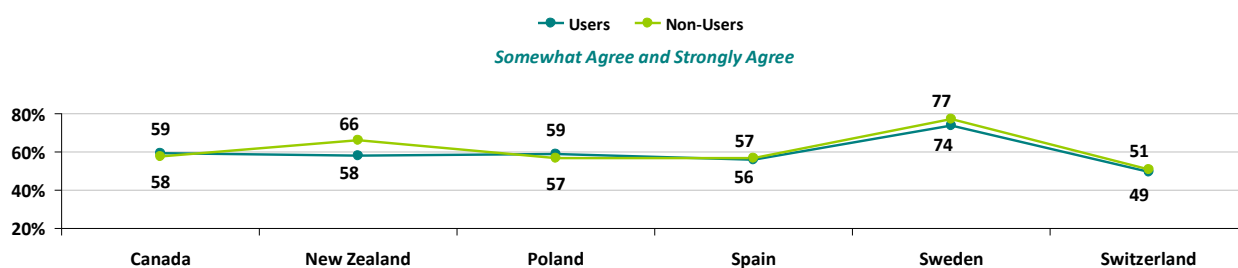
## 5.2 Freedom of Expression Online and Offline

Free speech online and in general is another issue that the World Internet Project has explored. Even though large percentages of (and in many cases the majority of) Internet users and non-users have a strong belief in the principle of free speech online and offline, they tend to be skeptical about the practice of free speech, and the protection of extreme forms of speech online in particular.

### Comfort Expressing Views about Politics

A majority of respondents in five of the six reporting countries (all except Switzerland) with data for this item agree that they are comfortable expressing their views about politics online. In Sweden, close to three in four Internet users and almost eight out of ten non-users feel comfortable expressing their views about politics, the highest among all reporting countries. In Spain, Poland, New Zealand, and Canada, at least 56 percent of users and non-users feel that way.

In all reporting countries, users and non-users hold similar opinions about free political speech, with the highest gap between users and non-users in comfort expressing political opinions found in New Zealand (58 percent vs. 66 percent).

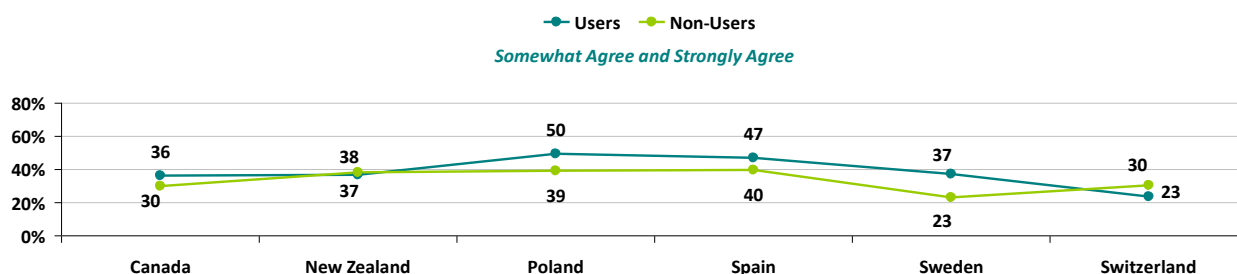


Q24A | All Respondents

## Feeling Safe Expressing Views about Politics

When the Internet as a medium for political speech is involved, users and non-users have divergent opinions in all reporting countries except New Zealand.

In New Zealand, similar percentages of users and non-users believe that it is safe to express their political views on the Internet. In all other countries, there is a perceptible gap between users and non-users in their perception of the issue. In Canada, Poland, Spain, and Sweden users tend to believe in the safety of online political free speech more than non-users do, while in Switzerland the opposite holds.

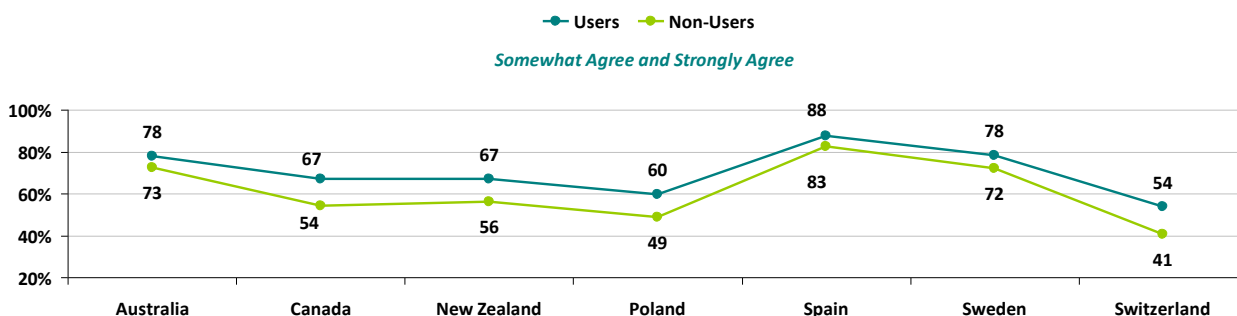


Q24B | All Respondents

## Criticizing the Government on the Internet

More than a majority of Internet users in all reporting countries believe that in the online environment they should have the freedom to criticize their government. In Spain 88 percent of users believe they are entitled to such freedom, and in Australia and Sweden 78 percent of users do.

In all reporting countries, Internet users tend to have this belief more than non-users do, and the largest gap between users and non-users is found in Canada and Switzerland (both at 13 percent.).



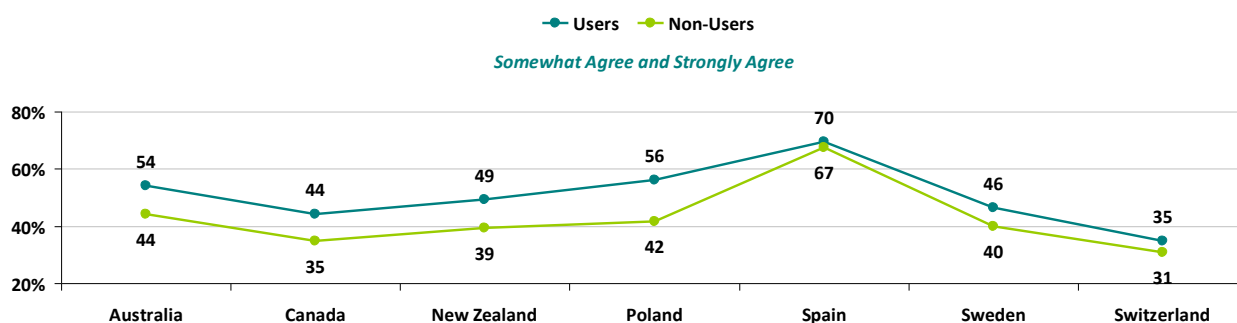
Q24C | All Respondents

## Expressing Ideas on the Internet, Even if they are Extreme

When it comes to extreme forms of online speech, the support from users and non-users is not as strong.

Among all seven reporting countries, only Spain (70 percent), Poland (56 percent), and Australia (54 percent) have a majority of Internet users who support extreme forms of free speech. In Switzerland, only 35 percent of users believe that it is acceptable for people to express their extreme ideas online.

Compared with users, even lower percentages of non-users in all reporting countries accept the idea that people can express their extreme views on the Internet.



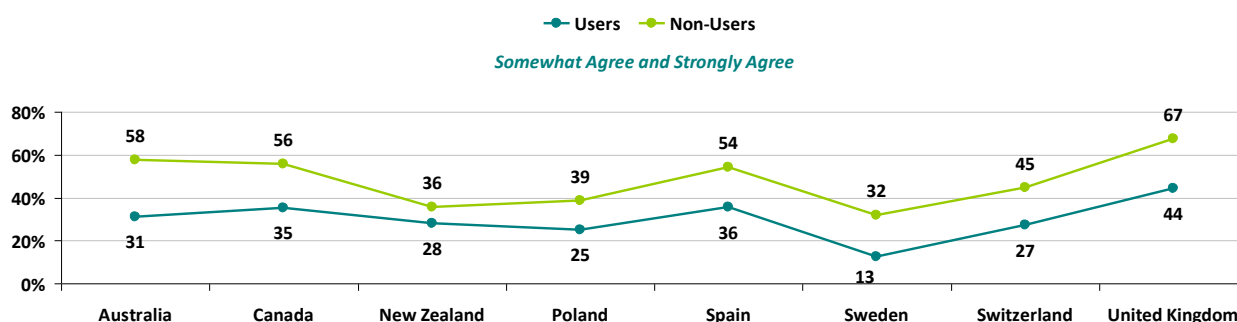
Q24D | All Respondents

## Government Regulating the Internet

Internet users and non-users in all reporting countries tend to have opposing views on more Internet regulation by the government; much higher percentages of non-users than users support the idea. The largest gaps between non-users and users can be found in Australia (27 percent), the U.K. (23 percent), and Canada (21 percent).

In seven of eight countries with data for this item, 36 percent or less of users believe that the government should regulate the Internet more than it does now. Users in Sweden (13 percent) are the least likely to favor such an idea, while users in the U.K. (44 percent) are the most likely to accept such a proposal.

Half of the eight reporting countries have more than a majority of non-users in favor of more government regulation of the Internet: Spain (54 percent), Canada (56 percent), Australia (58 percent), and the U.K. (67 percent). Compared with non-users in other countries, non-users in Sweden (32 percent) and New Zealand (36 percent) are less likely to favor more government regulation of the Internet.



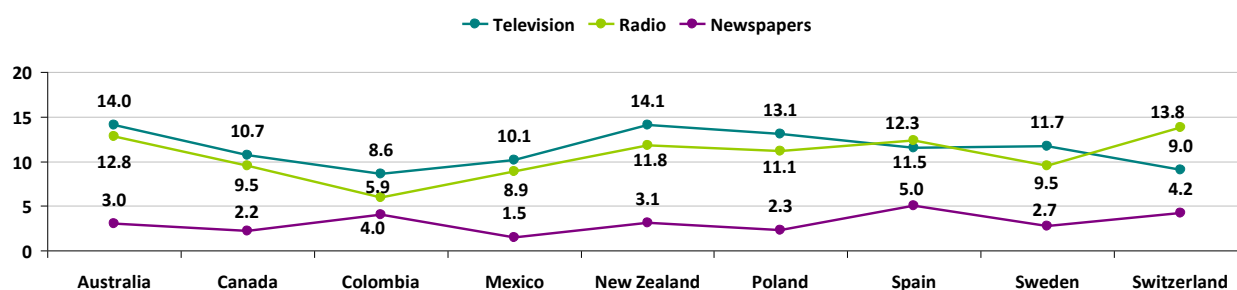
Q24E | All Respondents

## 6 | Media Use, Reliability, and Importance

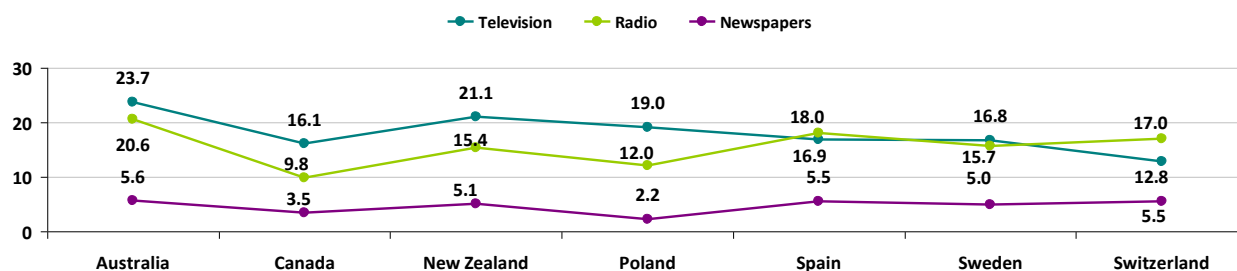
## 6.1 Use of Traditional Media: Users vs. Non-Users

Among the three traditional media under examination in the World Internet Project, people generally spend more time with television than with radio and newspapers in almost all reporting countries. Television tends to dominate people's media consumption, and the newspaper remains the least accessed medium among the three. There are a few exceptions to this. In Spain and Switzerland users and non-users spend more time listening to radio than watching television.

In addition, non-users consume more television, radio, and newspaper content than users in all countries except for Poland where users spend slightly more time reading newspapers than non-users per week (2.3 hours vs. 2.2 hours).



Q14ABC: Offline | Internet Users



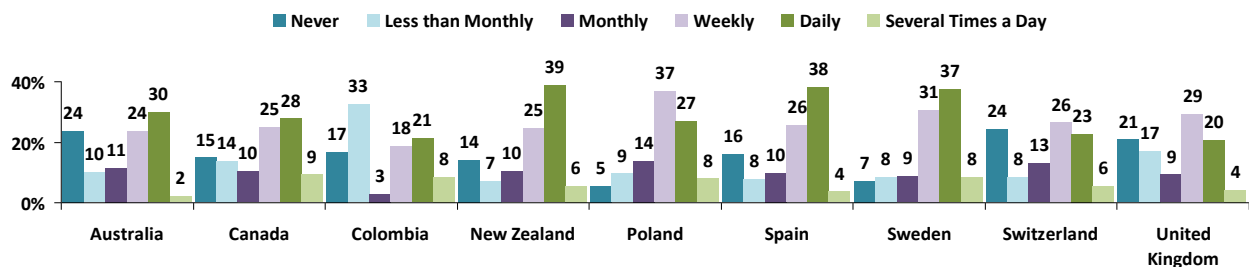
Q14ABC: Offline | Internet Non-Users

## 6.2 Use of Internet to Look for News

Even though the newspaper falls behind radio and television in terms of consumer consumption, looking for news online is a very common activity in most countries.

In eight of the nine reporting countries (all except Colombia) with data for this item, more than a majority of users look for local, national, and international news on a weekly basis. In Sweden 76 percent of users look for news online at least weekly, and in Poland it is 72 percent. At the other end of the spectrum, in Colombia only 47 percent of users do it on a weekly basis.

Conversely, low percentages of users never go online to look for news. In Poland and Sweden only 5 percent and 7 percent of Internet users, respectively, never look for news online. On the high end, in Australia and Switzerland 24 percent of users never look for news online.



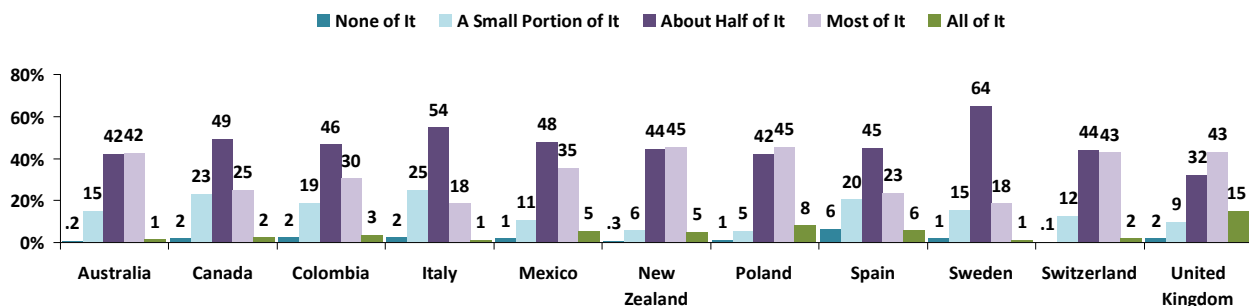
Q20A | Internet Users

## 6.3 Media Reliability: Information on the Internet

Internet users in the WIP countries do not always trust the information on the Internet to be reliable.

In six of the eleven reporting countries, 40 percent or more of Internet users believe most or all of the online information is reliable: Mexico (40 percent), Australia (43 percent), Switzerland (45 percent), New Zealand (50 percent), Poland (53 percent), and the U.K. (58 percent). However, in four reporting countries, less than 30 percent of users trust most or all of the online information to be reliable: Spain (29 percent), Canada (27 percent), Italy (19 percent), and Sweden (19 percent).

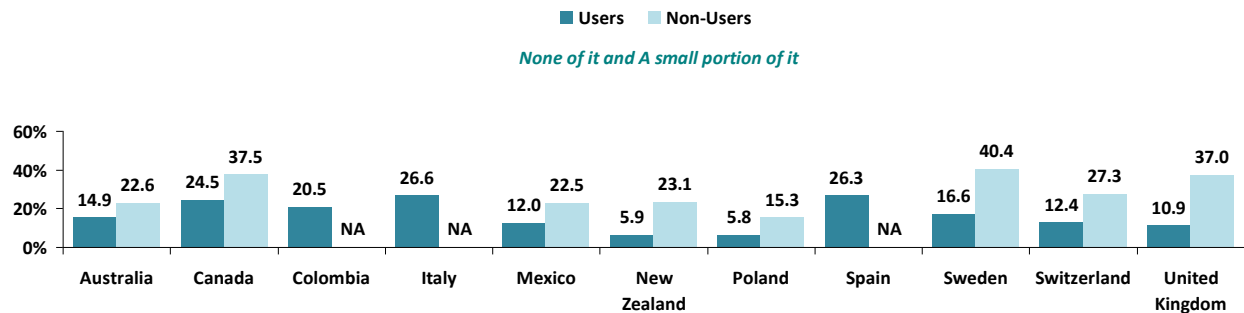
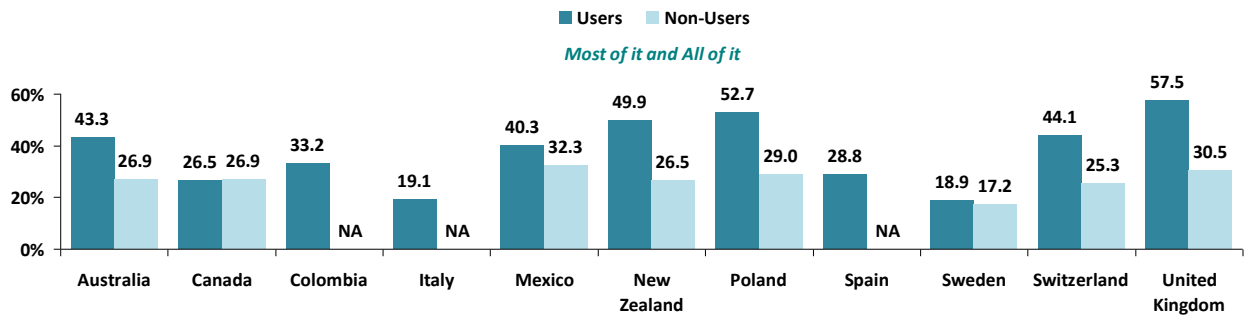
In all WIP countries except the U.K., 43 percent or more of users believe that about half of the information on the Internet is reliable. Sweden and Italy have the highest percentages in this regard, 64 percent and 54 percent, respectively.



Q11 | Internet Users

A comparison between users and non-users shows large differences in views about the reliability of information on the Internet, with users having more faith.

In all WIP countries except Canada, larger percentages of users than non-users believe that most or all of the information on the Internet is generally reliable. Conversely, larger percentages of non-users than users in all of the WIP countries said that none or a small portion of online information is reliable.

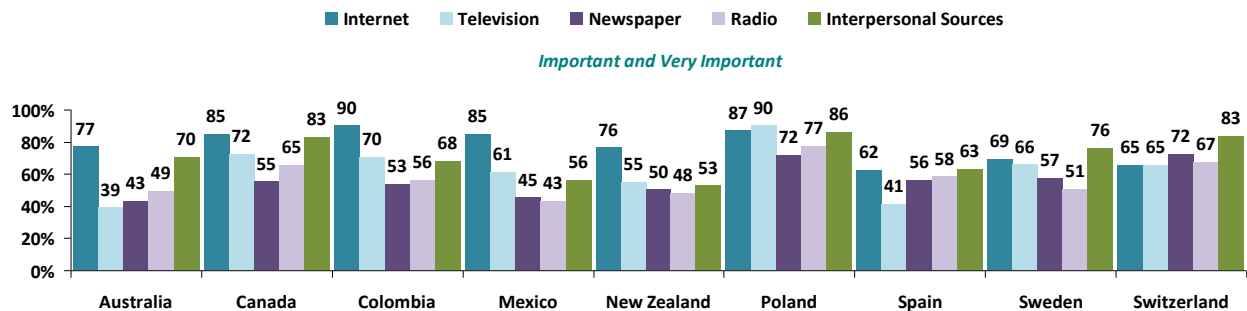


## 6.4 Media Importance: Media as Information Sources

Internet users do not always look at the Internet as the most important source of information. Only in five of the nine WIP countries with data for this item was the Internet chosen by the highest percentages of users as an important or very important source of information among the different media platforms.

In Australia, Canada, Colombia, Mexico, and New Zealand more users consider the Internet to be an important or very important source of information compared to television, radio, newspapers, and interpersonal sources. In Spain, Sweden, and Switzerland, interpersonal sources topped the list. And in Poland more Internet users opted for television.

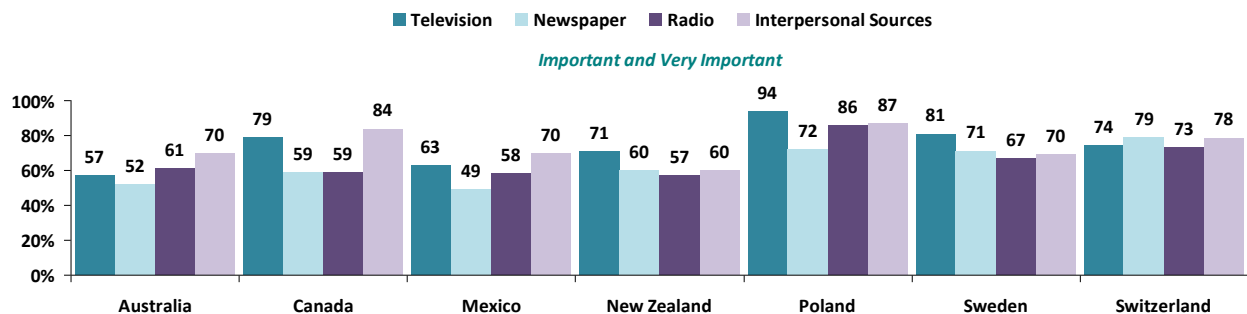
Among other highlights of WIP findings, only 39 percent of Internet users in Australia think of television as important and very important source of information, while 86 percent of Internet users in Poland find interpersonal sources to be important and very important source of information.



Q12 | Internet users

Among non-users, interpersonal sources prove to be a significant source of information. In four of the seven reporting countries with data for this item interpersonal sources were number one: Australia, Canada, Mexico, and Switzerland.

Only in New Zealand, Poland, and Sweden do the highest percentages of non-users agree that television is an important or very important source of information compared to the other media.



Q12 | Internet Non-Users

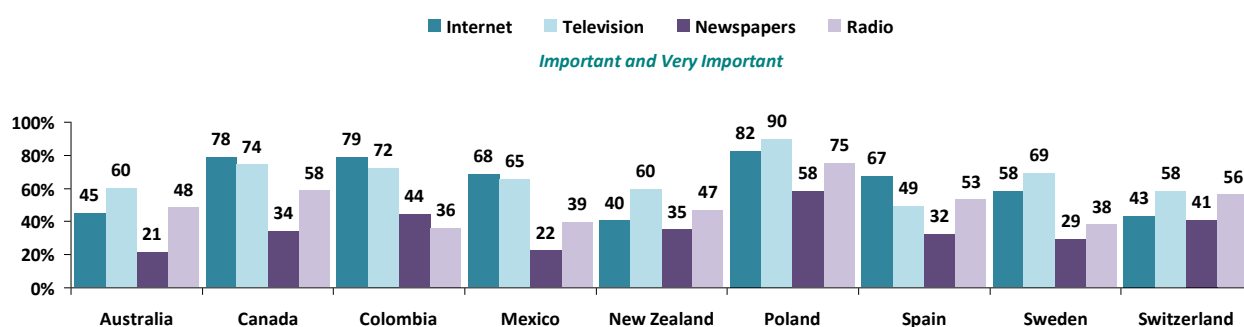


## 6.5 Media Importance: Media as Entertainment Sources

Internet users tend to value television and the Internet more than newspapers and radio as sources of entertainment.

In Australia, New Zealand, Poland, Sweden, and Switzerland more users consider the television than Internet to be an important or very important source of entertainment. In Canada, Colombia, Mexico, and Spain the Internet is placed on top.

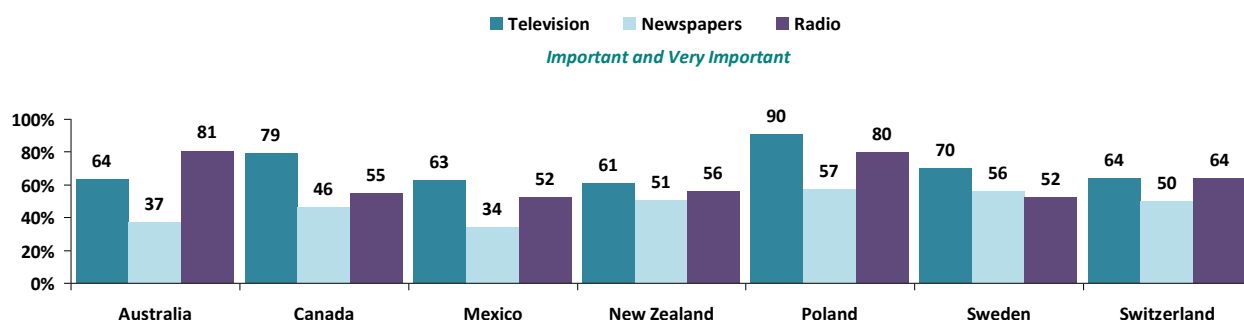
In general among users, the newspaper was chosen by the smallest number of people as an important source of entertainment. Only Poland has a majority of users who consider the newspaper to be an important or very important source of entertainment.



Q13 | Internet users

Among non-users in almost all countries, television commands the highest percentages of non-users who consider it to be an important or very important source of entertainment and newspapers the lowest. In Poland 90 percent of non-users consider television as important or very important in providing entertainment content.

Australia is the only country where more non-users think of radio than television or newspapers as an important or very important source of entertainment.



Q13 | Internet Non-Users

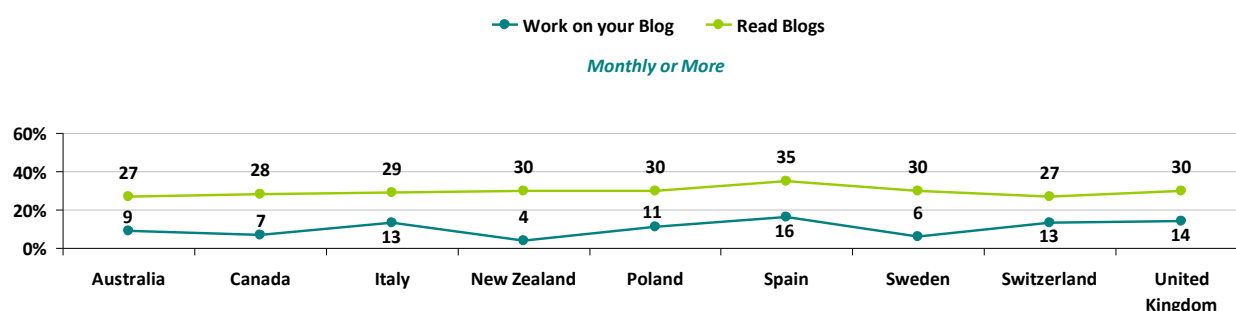
## 7 | User-generated Content and Social Media

## 7.1 Working on Blogs and Reading Blogs

In all of the WIP countries more Internet users read blogs than write blogs.

Most users do not work on blogs. In Poland, Italy, Switzerland, the U.K., and Spain more than 10 percent of users work on their blog at least monthly.

Compared with writing blogs, reading blogs is a more regular online activity. In five countries 30 percent or more of users read blogs at least monthly: New Zealand, Poland, Sweden, the U.K., and Spain.

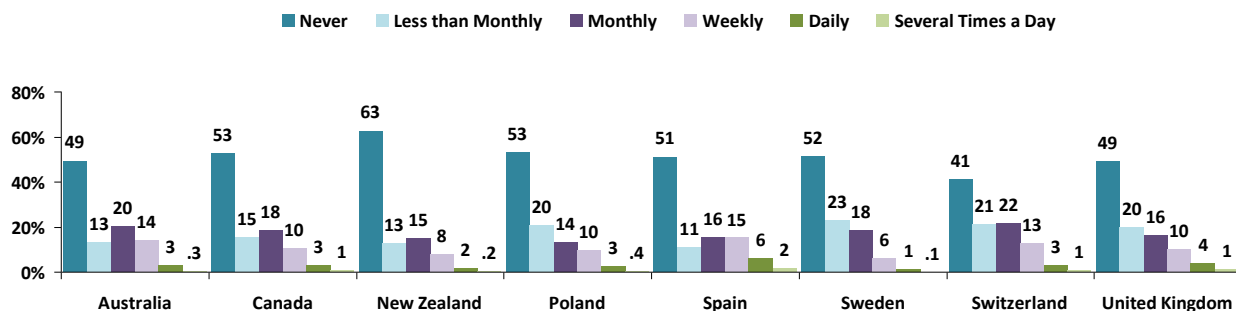


Q19F-20D | Internet Users

## 7.2 Posting Photos or Pictures

A quarter or more of Internet users in all reporting countries post photos or pictures online on at least monthly. In Spain and Switzerland 38 percent of users are engaged in this activity at least monthly.

In five of the eight countries, more than a majority of users never post photos or pictures online.

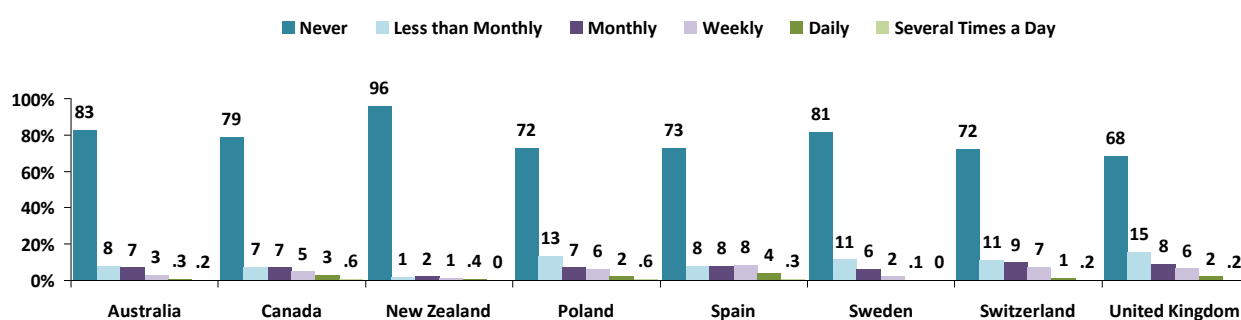


Q19G | Internet Users

## 7.3 Uploading Music Videos

High percentages of users never upload music videos online. In New Zealand 96 percent of users never do so, the highest in all reporting countries; that is followed by 81 percent in Sweden and 83 percent in Australia.

Very low percentages of users upload music videos online at least monthly. New Zealand has the lowest percentage of users engaged in this activity (3 percent), while Spain has the highest level of participation among its users (20 percent).

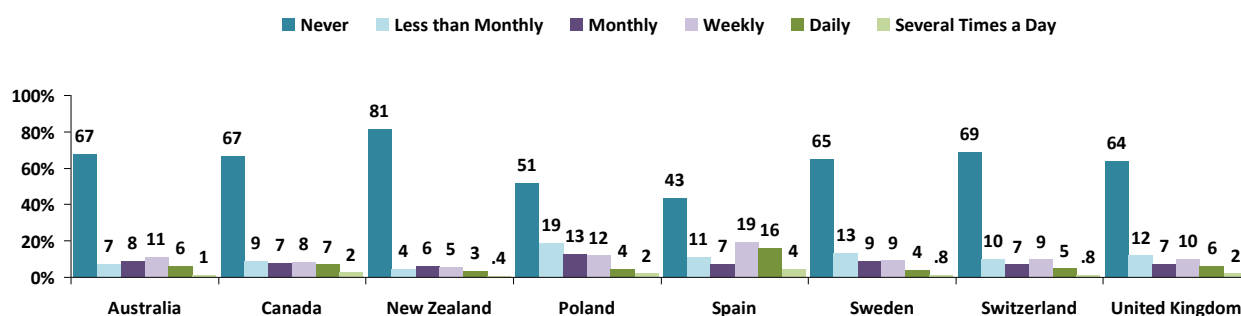


Q19H | Internet Users

## 7.4 Posting Messages or Comments on Discussion Boards

Relatively small numbers of Internet users post messages or comments on discussion boards. In seven of the eight reporting countries with data for this item, less than 20 percent of users post messages or comments on discussion boards at least weekly. Only 8 percent of users do so at least weekly in New Zealand.

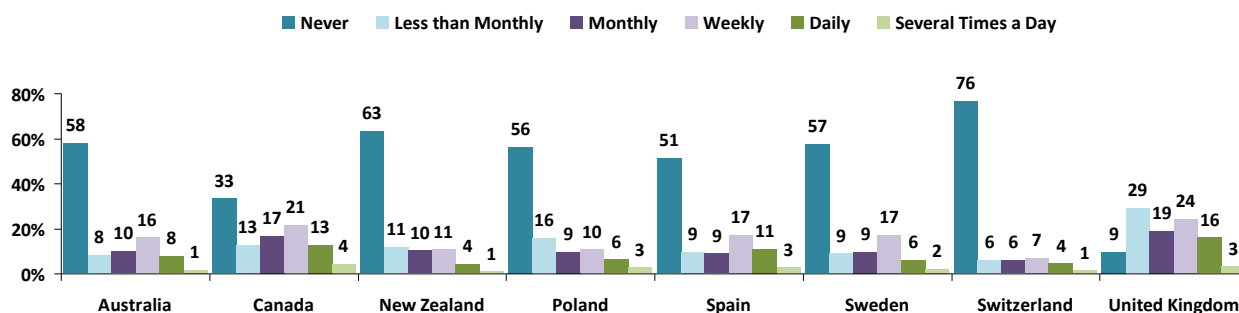
Internet users in Spain are the most active in all countries; 39 percent of them post at least weekly.



Q19I | Internet Users

## 7.5 Updating Personal Status

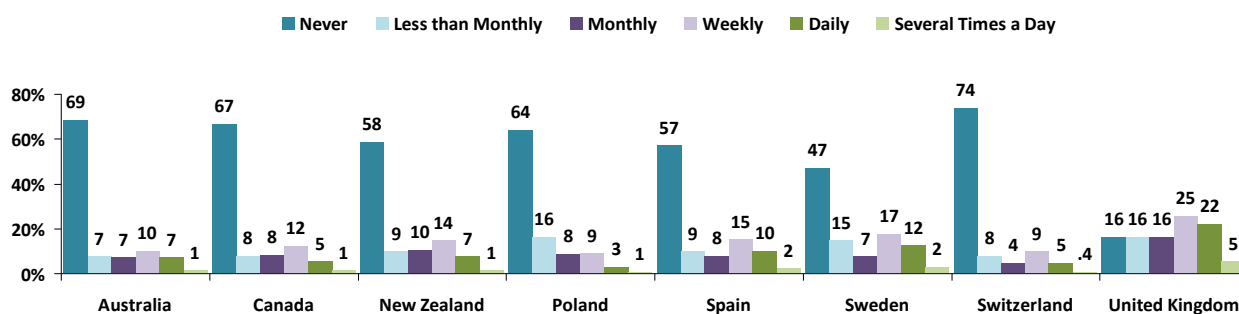
Compared with posting messages or comments on discussion boards, Internet users in all countries, except for Poland, Spain, and Switzerland, are more active in updating their personal status. Forty-three percent of users in the U.K. and 38 percent in Canada do so at least weekly.



Q19J | Internet Users

## 7.6 Commenting on Other People's Blogs or Message Boards

In all countries except for Sweden and the U.K., a majority of Internet users never comment on other people's blogs or message boards. In the U.K. 52 percent of users do so on a weekly basis, the highest among all reporting countries, followed by 31 percent in Sweden.

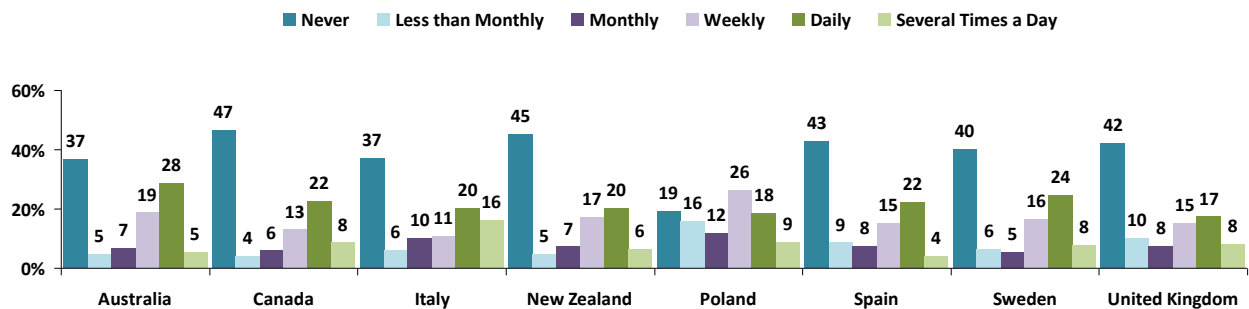


Q19K | Internet Users

## 7.7 Visiting Social Networking or Video-sharing Websites

Compared with other forms of social media activities, Internet users in many countries are more attracted to social networking or video-sharing websites. Relatively high percentages of users visit social networking or video-sharing websites; among all reporting countries more than a majority of users engage in these activities.

In all countries at least 40 percent of users visit social networking or video-sharing websites at least weekly. Poland has the highest percentage of users who engage in these activities at least weekly (53 percent), followed by Australia (52 percent).



Q21I | Internet Users

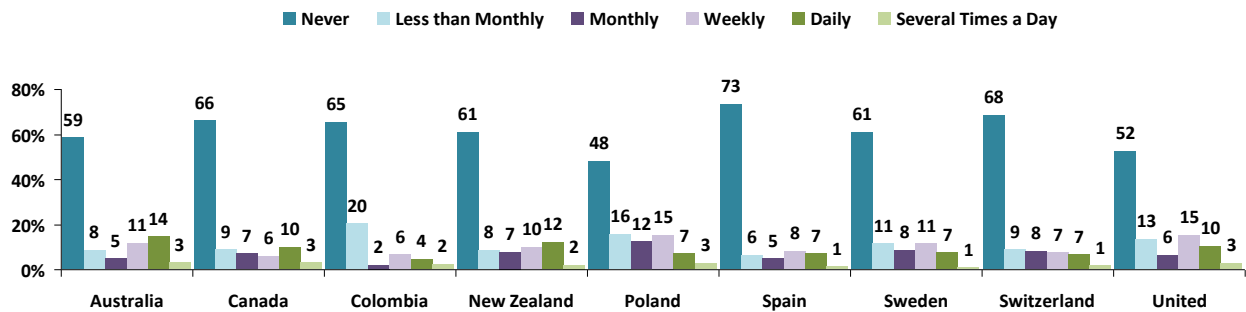
## 8 | Online Entertainment

## 8.1 Online Gaming

In all of the WIP countries, except Poland, a majority of Internet users never go online to play games.

In all reporting countries, except Colombia, more than 20 percent of Internet users engage in online gaming at least monthly. Users in the following countries are the most active in playing online games at least monthly: New Zealand (31 percent), Australia (33 percent), the U.K. (34 percent), and Poland (37 percent).

Colombia only has 14 percent of users who play online games at least monthly, the lowest among all reporting countries.



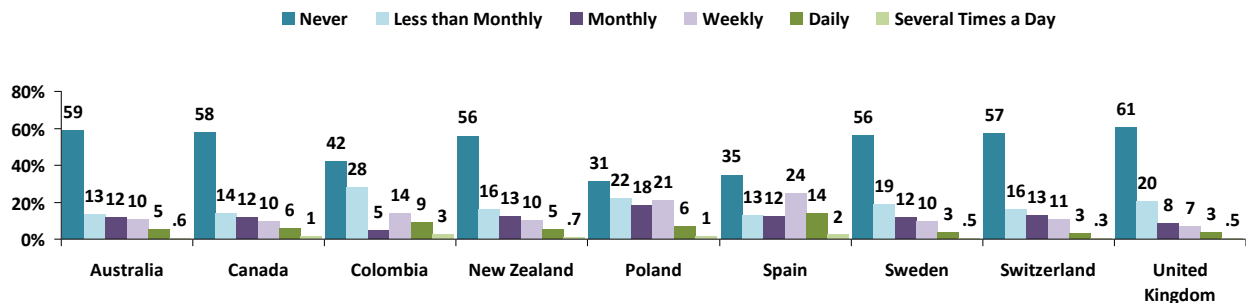
Q21A | Internet Users

## 8.2 Content Consumption

### Looking for Jokes or Humorous Content

Modest percentages of Internet users regularly look for jokes or humor online in all WIP countries.

In Poland and Spain going online to look for humorous content is more popular among Internet users compared with other WIP countries. In Poland 46 percent of users do it at least monthly, and in Spain that number is 52 percent.



Q20E | Internet Users

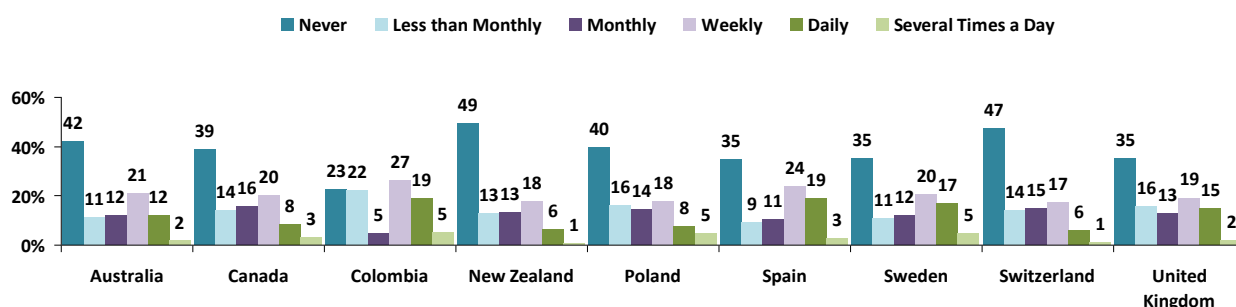


## Download or Listen to Music

More than a majority of Internet users in all of the WIP countries go online to download or listen to music.

In all reporting countries, except for Switzerland and New Zealand, at least 30 percent of users download or listen to music over the Internet at least weekly. Internet users in Colombia are the most involved in this online activity at least weekly; more than a majority (51 percent) of them do so on a weekly basis, followed by 46 percent in Spain and 42 percent in Sweden.

In Switzerland and New Zealand about a quarter of Internet users do so at least weekly.



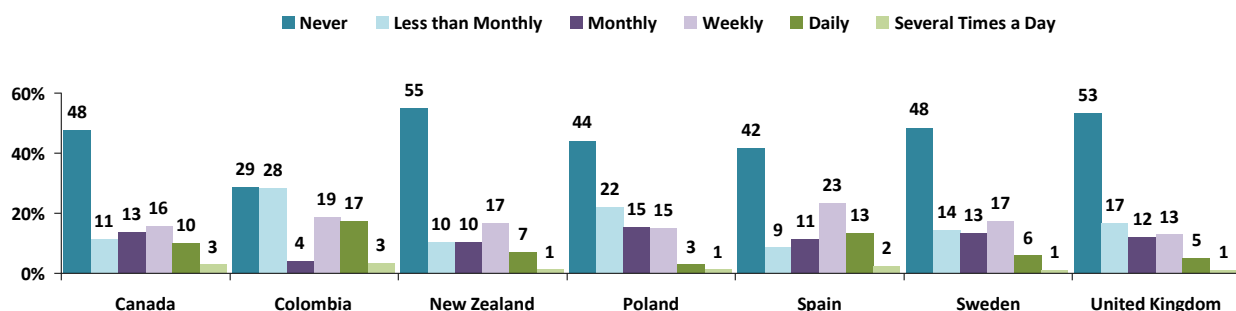
Q21B | Internet Users

## Download or Watch Videos

Lower percentages of users go online to download or watch videos compared to downloading or listening to music online.

In all of the reporting countries except for Colombia, more than 40 percent of users never go online to download or watch videos. In the U.K. and New Zealand 53 percent and 55 percent of users, respectively, never do so.

Downloading or watching videos online is more popular in Colombia and Spain than in the other reporting countries. In those two countries close to 4 out of 10 users go online to download or watch videos at least weekly. In the U.K. and Poland only about 2 out of 10 users do so on at least weekly, the lowest among all reporting countries.



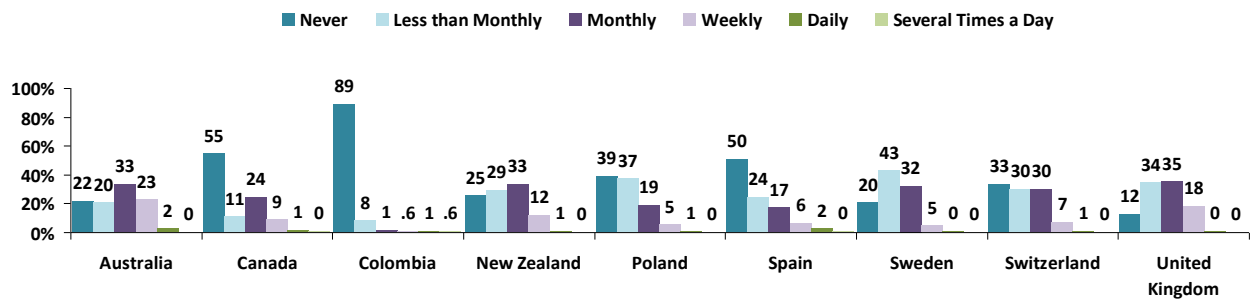
Q21C | Internet Users

## 9 | Online Purchase and Personal Privacy

## 9.1 Online Purchasing

Purchasing online has become a regular experience for more than one third of the Internet users in most reporting countries. In Canada, Sweden, Switzerland, New Zealand, the U.K., and Australia 34 percent or more of Internet users purchase online at least monthly. Among them, 53 percent of users in the U.K. and 58 percent in Australia do so at least monthly.

Buying online is a less frequent activity among Internet users in Colombia, Poland, and Spain. In Colombia 89 percent of users never purchase online, and in Poland and Spain only one in four Internet users buys online monthly or more.



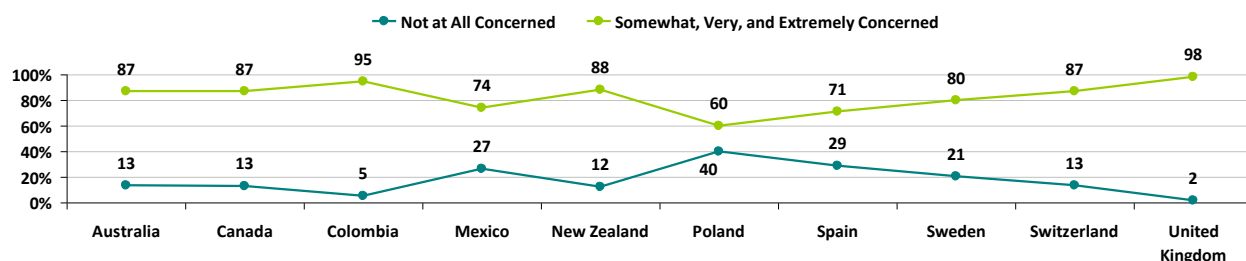
Q22B | Internet Users

## 9.2 Concerns about Privacy

Levels of concern about the security of credit card information during online purchasing are very high in all of the WIP countries. At least 60 percent of Internet users in all reporting countries reported some level of concern when or if they bought something online.

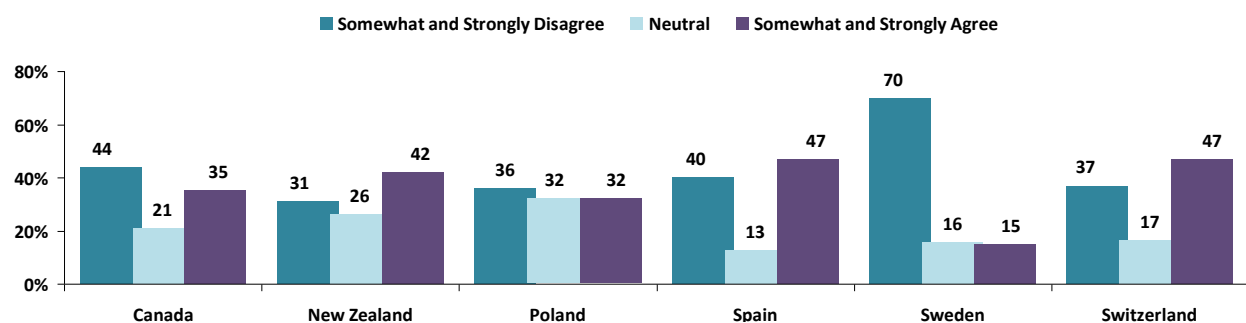
Users in Colombia and the U.K. are the most concerned, with 95 percent and 98 percent of users, respectively, having concerns of varying degrees. More than 80 percent of users in Colombia and 90 percent in the U.K. are very or extremely concerned about this issue.

Users in Poland tend to be the least disturbed by this issue; 40 percent of them are not concerned about the security of their credit card information at all.



Q8 | Internet Users who own a credit card

Companies are increasingly more capable of checking consumer behavior over the Internet for marketing purposes. However, compared with their concern over the security of their credit card information, Internet users generally are less concerned about companies checking what they do online. Even in Spain and Switzerland, where Internet users tend to be most concerned among all reporting countries, less than half of them are worried about companies checking their online activity. In Sweden only 15 percent of users are concerned about the issue, the lowest among all reporting countries.



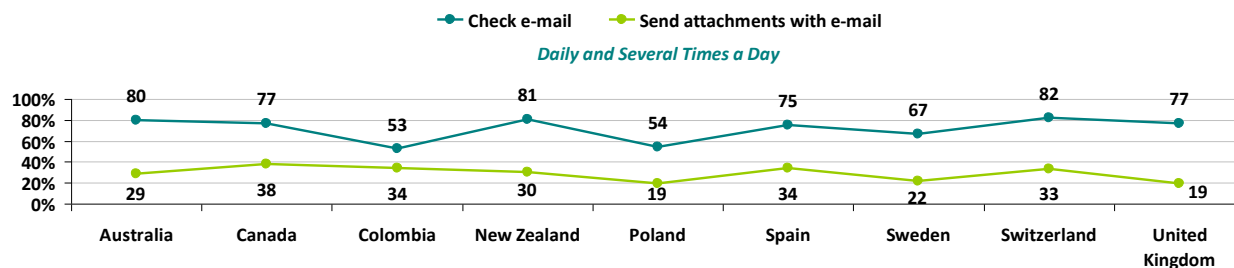
Q24G | Internet Users

# 10 | Online Communication

## 10.1 E-mails and E-mail Attachments

For a majority of Internet users in all WIP countries checking e-mail has become a regular daily activity. Internet users in Colombia and Poland are least likely to check e-mail daily or several times a day; 53 percent of users in Colombia and 54 percent in Poland engage in this activity daily or more often. Users in Australia, New Zealand, and Switzerland are more likely than users in other reporting countries to check e-mail daily or several times a day: 80 percent of users in Australia, 81 percent in New Zealand, and 82 percent in Switzerland do it at least daily.

Sending e-mail with attachments is a less regular form of online communication. Among the nine reporting countries with data for this item, only five have 30 percent or more of Internet users who send attachments with e-mails daily or more often: New Zealand (30 percent), Switzerland (33 percent), Colombia and Spain (both at 34 percent), and Canada (38 percent).



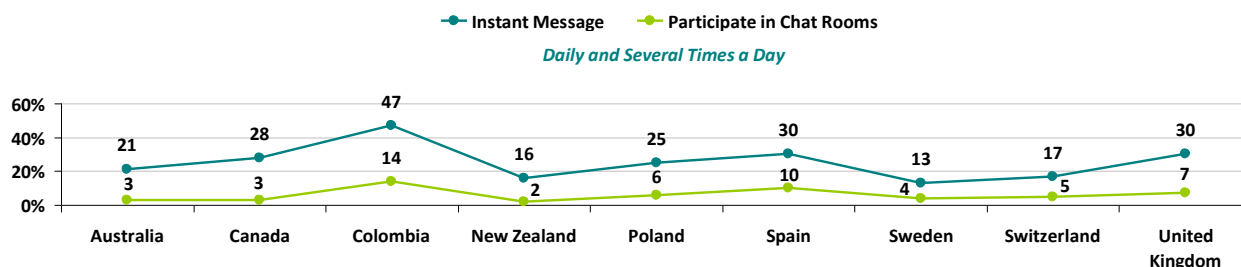
Q19AD | Internet Users

## 10.2 Instant Messaging and Chat Rooms

Compared with sending and receiving e-mail, instant messaging and participation in chat rooms are less frequent activities for the vast majority of Internet users in the WIP countries.

Instant messaging is a daily experience for a low percentage of Internet users in all reporting countries. Only in three of the ten reporting countries with data for this item do 30 percent or more of Internet users engage in instant messaging daily or several times a day: Colombia (47 percent), Spain (30 percent), and the U.K. (30 percent). In other countries less than 30 percent of users do so on a daily basis.

Even fewer Internet users participate in chat rooms on a regular daily basis. Spain and Colombia are the only countries where 10 percent or more of Internet users do so at least daily.



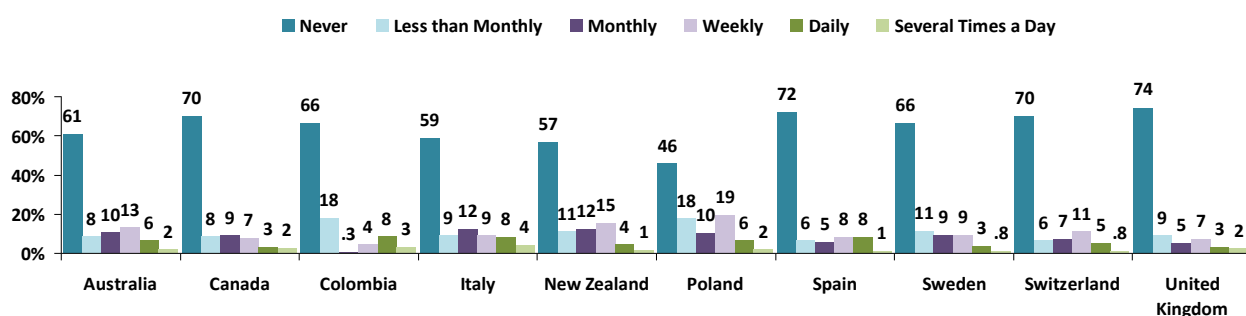
Q19BC | Internet Users

## 10.3 Online Telephone Calls

In spite of the development of online telephony, a majority of Internet users in all WIP countries except for Poland never make or receive phone calls over the Internet.

Poland has the highest level of Internet telephoning, with 55 percent of users going online to make or receive telephone calls. It also reported the highest monthly (or more) usage level at 37 percent. Three other countries have a monthly usage level higher than 30 percent: Australia (31 percent), Italy (33 percent), and New Zealand (32 percent).

In all reporting countries 12 percent or less of Internet users make or receive online telephone calls daily or several times a day.



Q19E | Internet Users

# APPENDIX



## APPENDIX 1 | World Internet Project: International Contacts

<b>UNITED STATES (Organizer)</b>	Center for the Digital Future USC Annenberg School for Communication and Journalism <a href="http://www.digitalcenter.org">www.digitalcenter.org</a>
<b>AUSTRALIA</b>	ARC Center of Excellence for Creative Industries and Innovation (CCi) Institute of Social Research, Swinburne University of Technology <a href="http://www.cci.edu.au/projects/digital-futures">www.cci.edu.au/projects/digital-futures</a>
<b>AUSTRIA</b>	Commission for Comparative Media and Communication Studies (CMC) Austrian Academy of Sciences <a href="http://www.oeaw.ac.at/cmc">www.oeaw.ac.at/cmc</a>
<b>BRAZIL</b>	Instituto Brasileiro de Economia e Tecnologia (Brazilian Economics and Technology Institute) <a href="http://www.braeti.net">www.braeti.net</a>
<b>CANADA</b>	Canadian Internet Project (CIP)/ Recherche Internet Canada (RIC) <a href="http://www.ciponline.ca">www.ciponline.ca</a>
<b>CAPE VERDE</b>	Inove Research, Lda <a href="http://research.inove.cv/">http://research.inove.cv/</a>
<b>CHILE</b>	Pontificia Universidad Catolica de Chile, School of Communications (UC) Sociology and Engineering/Santiago Chamber of Commerce (CCS) <a href="http://www.wipchile.cl">www.wipchile.cl</a>
<b>CHINA</b>	China Internet Network Information Center <a href="http://www.cnnic.cn">www.cnnic.cn</a>
<b>COLOMBIA</b>	Centro de Investigacion de las Telecomunicaciones (CINTEL) <a href="http://www.cintel.org.co">www.cintel.org.co</a>
<b>CROATIA</b>	Innovation Institute <a href="http://www.innovation-institute.eu">www.innovation-institute.eu</a>

<b>CYPRUS</b>	Cyprus University of Technology (CUT) Department of Communication and Internet Studies <a href="http://www.cut.ac.cy/">http://www.cut.ac.cy/</a>
<b>CZECH REPUBLIC</b>	Masaryk University, Brno, Faculty of Social Sciences (FSS) <a href="http://www.fss.muni.cz/ivdmr">www.fss.muni.cz/ivdmr</a>
<b>ECUADOR</b>	Universidad de los Hemisferios (University of the Hemispheres) <a href="http://www.uhemisferios.edu.ec">www.uhemisferios.edu.ec</a>
<b>FRANCE</b>	Center for Political Research at Sciences-Po (CEVIPOF) <a href="http://www.cevipof.com">www.cevipof.com</a>
<b>GERMANY</b>	Institut der deutschen Wirtschaft Köln Consult GmbH <a href="http://www.iwkoeln.de/de">http://www.iwkoeln.de/de</a>
<b>HUNGARY</b>	Information Society and Network Research Center (ITHAKA) <a href="http://www.ithaka.hu">www.ithaka.hu</a>
<b>INDIA</b>	School of Journalism and New Media Studies, IGNOU <a href="http://www.ignou.ac.in/ignou/aboutignou/school/introduction">http://www.ignou.ac.in/ignou/aboutignou/school/introduction</a> <a href="http://www.ignou.ac.in">www.ignou.ac.in</a>
<b>IRAN</b>	University of Alzahra <a href="http://www.alzahra.ac.ir">www.alzahra.ac.ir</a>
<b>ISRAEL</b>	The Research Center for Internet Psychology (CIP) Sammy Ofer School of Communications, The Interdisciplinary Center (IDC) <a href="http://www.idc.ac.il/communications/cip/en">www.idc.ac.il/communications/cip/en</a>
<b>ITALY</b>	SDA Bocconi, Bocconi University <a href="http://www.sdabocconi.it/home/it">www.sdabocconi.it/home/it</a>
<b>JAPAN</b>	Toyo University, World Internet Project Japan (JWIP) <a href="http://www.soc.toyo.ac.jp/~mikami/wip/en/index.html">www.soc.toyo.ac.jp/~mikami/wip/en/index.html</a>
<b>MACAO</b>	University of Macau, ERS E-Research (Lab) Macao Internet Project (MIP) <a href="http://www.macaointernetproject.net">www.macaointernetproject.net</a>
<b>MEXICO</b>	Tecnologico de Monterrey, Proyecto Internet <a href="http://www.wip.mx">www.wip.mx</a>

<b>NEW ZEALAND</b>	Institute of Culture, Discourse and Communication (ICDC) AUT University <a href="http://www.wipnz.aut.ac.nz">www.wipnz.aut.ac.nz</a>
<b>POLAND</b>	Gazeta.pl Research and Analyses Unit <a href="http://badania.gazeta.pl">http://badania.gazeta.pl</a>
<b>PORTUGAL</b>	Lisbon Internet and Networks International Research Programme (LINI) <a href="http://www.lini-research.org">http://www.lini-research.org</a>
<b>RUSSIA</b>	Sholokhov Moscow State University for the Humanities <a href="http://mggu-sh.ru/en">http://mggu-sh.ru/en</a>
<b>SINGAPORE</b>	Singapore Internet Research Centre (SiRC) Nanyang Technological University <a href="http://www.ntu.edu.sg/sci/sirc">www.ntu.edu.sg/sci/sirc</a>
<b>SOUTH AFRICA</b>	The Media Observatory Wits Journalism, University of Witwatersrand, Johannesburg <a href="http://www.journalism.co.za">www.journalism.co.za</a>
<b>SOUTH KOREA</b>	Yonsei University <a href="http://www.yonsei.ac.kr">www.yonsei.ac.kr</a>
<b>SPAIN</b>	Internet Interdisciplinary Institute (IN3) Open University of Catalonia (UOC) <a href="http://www.uoc.edu/in3/pic/eng/communication.html">www.uoc.edu/in3/pic/eng/communication.html</a>
<b>SWEDEN</b>	.SE (The Internet Infrastructure Foundation) World Internet Institute <a href="http://www.iis.se">www.iis.se</a>   <a href="http://www.wwi.se">www.wwi.se</a>
<b>SWITZERLAND</b>	Media Change & Innovation Division IPMZ – Institute of Mass Communication and Media Research University of Zurich, Switzerland <a href="http://www.mediachange.ch">www.mediachange.ch</a>
<b>TAIWAN</b>	Taiwan e-Governance Research Center Department of Public Administration, National Chengchi University <a href="http://www.teg.org.tw">http://www.teg.org.tw</a> <a href="http://pa.nccu.edu.tw/">http://pa.nccu.edu.tw/</a>

**UNITED ARAB EMIRATES** American University of Sharjah  
Department of Mass Communication  
[www.aus.edu](http://www.aus.edu)

**UNITED KINGDOM** Oxford Internet Institute (OII)  
[www.oii.ox.ac.uk/microsites/oxis/](http://www.oii.ox.ac.uk/microsites/oxis/)

**URUGUAY** Universidad Catolica del Uruguay  
[www.ucu.edu.uy](http://www.ucu.edu.uy)

## APPENDIX 2 | Research Methods

### Australia

The Australian survey was conducted by telephone between 8th June and 6th July, 2011. A random sample of 1,001 Australians aged 18 years and over was interviewed. There were three quota requirements: age (5 groups) x gender x location (capital city/balance), resulting in 20 quota groups.

Sample numbers were further grouped by state and territory urban (capital city) and rural (balance) regions, with proportionately greater numbers in New South Wales, Victoria, and Queensland. This was done in order to provide data that was more representative of the Australian population.

### Canada

The survey in Canada was conducted between May 13 and September 4, 2011 by the Institute for Social Research at York University, Toronto. The sample was based on Random Digit Dialing, stratified by region (to ensure regions with smaller populations were adequately represented). Using Computer Assisted Telephone Interviewing, 2,657 interviews were conducted: 2,217 in English and 440 in French in Canada's ten provinces (but not including the sparsely populated northern territories). Respondents 12 years and older were interviewed, of which 2,300 were adult respondents (18 years +) and 357 were youth respondents (12 – 17 years old). The results were weighted by province, gender, and age, using data from the most recent national census.

### Colombia

The survey was conducted in Spanish. Four hundred mobile phone users, aged 12 and above, were interviewed from May to June 2011. A semi-structured questionnaire was used in mobile phone interviews. The sample, stratified and drawn from more than 100 municipalities, was representative at the national level with a 95 percent confidence interval.

### Italy

The Italian WIP data was collected in January and February 2011. We replicated the same methodology that we have used since 1998, using a telephone survey and a representative sample of the population aged 16 and above each year. The sample of 829 was built using a random extraction from the public phone lists. Quotas were applied for geographical area, gender, education, and age.

### Mexico

The World Internet Project survey in Mexico was conducted throughout the country, including all 32 states, in cities with over 50,000 inhabitants. The field work was conducted during the months of December 2010, and January and February 2011. A total of 2,000 interviews were completed among Internet users and non-users between the ages of 12 and 70.

## New Zealand

New Zealand collected its data from July 15 to September 18, 2011 through a telephone survey of people across urban and rural areas. About half of the 2011 sample of 1,255 people (aged 12 and over) were respondents from 2007 and 2009 who agreed to be re-interviewed as part of an ongoing panel. Of the fresh contacts in the 2011 survey, half were from a random sample, while the other half came from three targeted booster samples that enabled census proportions of ethnic groups to be obtained. The responses for individuals were weighted according to gender, age, ethnicity and household size, so that the sample is as representative as possible of NZ demographics according to the 2006 census. The average age of respondents in the sample is somewhat older than in the population, even after weighting. People without landlines and non-English speakers were excluded.

## Poland

In Poland 2000 face-to-face, in-home interviews were conducted on a random-quota representative sample of Poles aged 15 and above. The data was gathered from 11 May – 5 June 2011, keeping seasonal comparability with the first wave of Polish data (25 May – 29 June 2010). Weighting was not necessary for the 2011 data.

## Spain

Data was gathered by telephone from May 31st to June 7th, 2011. The sample of 2,100 was representative of the general Spanish population aged 16 and above. The sample was segmented by size of place of residence. The sampling procedure followed a three stage selection process: (1) primary sampling units, municipalities, were randomly selected, (2) secondary sampling units, households, were randomly selected by phone number, and (3) individuals within households were randomly selected until sex and age quotas were completed.

## Sweden

The Swedish data was collected by telephone interview from April to June 2011. In 2000, the first year the survey was conducted, a random sample of Sweden's population was drawn from the national telephone register. This sample has been supplemented annually with a stratified sample (by age and gender to ensure adequate representation in regard to these variables) to replace lost members. In 2011, 2,616 respondents over the age of 16 and 128 children between the ages of 12 and 15 were interviewed.

## Switzerland

The World Internet Project was conducted for the first time in Switzerland in 2011 from May 9 to June 21. The data was collected from 1,104 computer-assisted telephone interviews with respondents aged 14 and above. The sample was representative of the Swiss population by gender, age, and language region (German, French, and Italian).

## United Kingdom

The data from the United Kingdom was collected by face-to-face interviews with a representative sample of the British population. It includes people 14 years of age and older living in England, Wales, and Scotland, but not Northern Ireland. Interviewers were in the field in February and March 2011. Population proportions can be recovered by using a weighting variable to weight individual cases. The weights are based on age, gender, ACORN group (a standard British measure of social status), and region.

[www.worldinterproject.net](http://www.worldinterproject.net)



**Center for the Digital Future**  
**USC Annenberg School for Communication and Journalism**  
11444 West Olympic Blvd, Suite 120  
Los Angeles, California 90089