

THE UCLA INTERNET REPORT 2001

Surveying the Digital Future

YEAR TWO

UCLA CENTER FOR COMMUNICATION POLICY

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THE UCLA INTERNET REPORT 2001

Surveying the Digital Future

YEAR TWO

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Surveying the Digital Future

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The UCLA Center for Communication Policy thanks its foundation and corporate partners,
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America Online (AOL) Time Warner
Microsoft
The Walt Disney Company
Sony
Verizon
Pacific Bell
DirecTV
Accenture
Hewlett-Packard
Merrill Lynch
National Cable Television Association

SUMMARY: UCLA INTERNET REPORT 2001

In 2000, the first report of the UCLA Internet Project created a base profile of behavior and attitudes about Internet use and non-use. This year, the 2001 UCLA Internet Report presents data on more than 100 major issues. Most of this 2001 data is compared with findings from 2000.

The 2001 report focuses on Internet users vs. non-users, as well as new users (less than one year of experience) compared to very experienced users (five or more years of experience).

The 2001 UCLA Internet Project leaves little doubt that the Internet is now a mainstream activity in American life that continues to spread among people across all age groups, education levels, and incomes.

Highlights of the UCLA Internet Report within its five major areas include:

WHO IS ONLINE? WHO IS NOT? WHAT ARE USERS DOING ONLINE?

TOTAL INTERNET ACCESS

- The UCLA Internet Project found that 72.3 percent of Americans in 2001 go online, an increase from 66.9 percent in 2000. (Pages 17 and 18)

HOURS ONLINE

- Users in 2001 go online about 9.8 hours per week, up from 9.4 hours per week in 2000. (Pages 17 and 18)

ARE USERS SATISFIED OR DISSATISFIED WITH THE INTERNET?

- Users of the Internet in 2001 are satisfied with online technology at the same level as in 2000. The Internet overall received a rating of 4.0 on a scale of 1 (low) to 5 (high).
- Users are most satisfied with their ability to communicate with other people using the Internet.
- In a new question for 2001, users positively rated the ability to purchase items online as 3.7 on a scale of 1 to 5.
- Users were least satisfied with the speed of their connection to the Internet, rating it 3.2. (Page 87)

MOST POPULAR INTERNET ACTIVITIES

- The top five most popular Internet activities are using e-mail and instant messaging, web browsing, buying online, finding entertainment information, and reading news. (Page 18)

GOING ONLINE: THE PRIMARY REASON

- The top reason why users started to use the Internet is to obtain information quickly, followed by work needs, and then access to e-mail. (Page 19)

SUMMARY: UCLA INTERNET REPORT 2001 (CONTINUED)**BUYING ONLINE**

- 48.9 percent of Internet users purchased online in 2001, down from 50.7 percent in 2000. (Page 38)

WILL NON-USERS GO ONLINE IN 2002?

- Of respondents who are not online, 44.4 percent say they expect to go online within 12 months, up from 40 percent in 2000. (Page 28)

NEW USERS VS. VERY EXPERIENCED USERS: MAJOR DIFFERENCES

- The study found that a new gap in patterns of Internet use is emerging: the difference between how experienced users and those with little experience online use the Internet. (Page 18)

MODEM VS. BROADBAND: HOW LONG ONLINE?

- Internet users with broadband report 3.2 more online hours per week than Internet users who connect with a telephone modem. (Page 25)

NON-USERS: WHY NOT ONLINE?

- The primary reason why 27.7 percent of Americans are not online is “no computer” or “lack of access to an adequate computer.” The number of non-users who are “not interested” is declining. (Page 26)

ELECTRONIC DROPOUTS: WHY?

- The primary reason for not using the Internet given by non-users who were once users is the same as the response of those who do not currently use the Internet: “no computer available.” (Page 27)

MEDIA USE AND TRUST**MEDIA USE**

- As in 2000, the 2001 UCLA Internet Report found that Internet users employ substantially more media than non-users. The only media use more by non-users than users is television. (Page 30)

TELEVISION: VIEWING DECLINES AMONG INTERNET USERS

- Responses to several questions reveal that Internet users of all ages watch significantly less television than non-users: Internet users in 2001 watch 4.5 hours per week less television than non-users; television viewing decreases as Internet experience increases; almost one-quarter of adults say that the children in their households watch less television since they started using the Internet. (Pages 32, 76, and 78)

THE INTERNET: AN IMPORTANT SOURCE OF INFORMATION? FOR ENTERTAINMENT?

- Increasing numbers of users say the Internet is an important source of information. Even new users believe that the Internet is a very important or extremely important source of information.
- Rankings of online content as a source of entertainment are roughly unchanged from 2000. (Page 33)

MEDIA AND SEXUAL CONTENT

- A new question for 2001 asks about the amount of sexual content on television, in movies, and on the Internet. Large majorities of respondents (82.4 percent for movies, 80.5 percent for television, and 61.1 percent for the Internet) say that half or more of the subject matter found in all of these media contains too much sexual content. (Page 35)

INFORMATION ON THE INTERNET: IS IT RELIABLE AND ACCURATE?

- 36.3 percent of users say that half of online information is reliable and accurate. (Page 36)

SUMMARY: UCLA INTERNET REPORT 2001 (CONTINUED)**CONSUMER BEHAVIOR****HOW OFTEN DO YOU BUY ONLINE?**

- Of the 48.9 percent of users who made a purchase online in 2001, more than three-quarters say they make 1-10 purchases per year. Very experienced Internet users average 20 online purchases per year, compared to four annual purchases for new users. (Page 38)

SHOPPING IN STORES, BUYING ONLINE; SHOPPING ONLINE, BUYING IN STORES

- The number of Internet purchasers who say they shop in local stores and later buy online has declined. The number of Internet users who browse online and later buy in stores has also declined. (Page 48)

INTERNET PURCHASING: EFFECTS ON RETAIL, MAIL AND PHONE ORDERS

- In 2001, online buying continues to replace some purchasing in retail stores, but at a lower level than in 2000. Buying online also affects purchasing by mail or phone order. (Pages 40, 41, and 45)

THE FIRST ONLINE PURCHASE: HOW LONG DID IT TAKE?

- Most Internet users do not begin buying online immediately; users 56-65 years old require the longest amount of time (23.2 months) before the first purchase, followed by those ages 19-24.
- When asked why users wait to make their first online purchase, concern about fraud and deception rank among the top reasons. (Page 42 and 43)

SALES TAX: WOULD IT AFFECT ONLINE PURCHASING?

- Of current Internet purchasers, 43.3 percent agree or strongly agree that the addition of sales tax for online purchases would reduce their buying on the Internet. (Page 52)

FREE ONLINE SERVICES: WILL INTERNET USERS PAY FOR THEM?

- When Internet users are asked if they would be willing to pay a reasonable price for a free online service if it became a pay service, 37.9 percent agree, while 32.8 disagree. (Page 53)

CONCERNS ABOUT CREDIT CARD INFORMATION: A MAJOR PROBLEM

- In both 2000 and 2001, the UCLA Internet Project found deep concerns about privacy among all users; prominent among the privacy issues was concern about credit card security. (Page 53)

COMMUNICATION PATTERNS**DOES E-MAIL REQUIRE TOO MUCH TIME?**

- Although complaints about bulging e-mail inboxes may seem a common office problem, large majorities of users in 2000 and 2001 do not think that e-mail requires too much time. (Page 58)

E-MAIL: DOES IT HELP YOU REACH OUT TO OTHERS?

- Growing numbers of users say that e-mail helps them communicate with people they could not normally connect with otherwise. (Pages 56, 57, and 72)

MEETING PEOPLE: IS IT EASIER ONLINE?

- Although Internet users consider e-mail a powerful tool to stay in touch with people they know, they do not believe it is easier to meet new people online than in person. (Pages 59)

INTERNET SCREEN NAMES WITH DIFFERENT PERSONALITIES

- A small number of users say they have multiple screen names, and each name has its own personality. This is most common among girls ages 16-18. (Page 61)

SUMMARY: UCLA INTERNET REPORT 2001 (CONTINUED)**SOCIAL AND PSYCHOLOGICAL EFFECTS****CHILDREN AND THE INTERNET**

- Internet users and non-users agree at nearly identical levels that children can gain access to “a lot of inappropriate material” while online.
- Adults say that children in their household do not spend too much time online, nor does the Internet negatively affect their grades or friendships.
- Almost one-quarter of children now watch less TV than before they used the Internet. (Pages 75-81)

PRIVACY ONLINE

- As in 2000, the issue of privacy continues to raise significant concerns about the Internet among both users and non-users in 2001. Users and non-users alike express considerable concern that using the Internet creates risks to individual privacy. (Pages 65-67)

MAINTAINING PRIVACY FROM PRIVATE BUSINESS AND GOVERNMENT

- Private business has joined the government as a major threat to personal privacy. Internet users and non-users express extremely high levels of concern about maintaining the privacy of personal information from both government and business. (Page 66)

HOUSEHOLD TIME TOGETHER

- Internet users overall believe that going online either has no influence on the amount of time spent with household members, or positively influences household time together.
- Experience online does affect household time together. (Page 68)

HOW DOES THE INTERNET AFFECT TIME WITH FAMILY AND FRIENDS?

- Internet users spend more time than non-users socializing with friends, and almost as much time socializing with family members. Users and non-users report similar amounts of time involved in activities with household members; the only decline was time spent watching television. (Pages 68 and 69)

ARE INTERNET USERS CONNECTING MORE WITH FAMILY AND FRIENDS?

- The Internet is a catalyst for creating and maintaining friendships and family relationships – but views about its usefulness for this purpose vary widely. (Page 71)

ONLINE FRIENDS: DO YOU MEET THEM IN PERSON?

- In 2001, 18.8 percent of Internet users say they have met someone in person whom they originally met online. Those users report an average six new friends met in person, up slightly from 2000. (Page 72)

POLITICAL POWER AND INFLUENCE

- Users in 2001 say the Internet continues to be an important resource for gathering information about political issues, but declining numbers believe that the Internet gives them more political power, or helps them influence political decisions and government officials. (Pages 82)

DOES THE INTERNET AFFECT WORKPLACE PRODUCTIVITY?

- Most users say the Internet is a catalyst for workplace productivity.
- Of employees who say the Internet makes them less productive, the most frequently cited reason for lower productivity is spending time on the Internet doing things unrelated to their jobs. (Page 84 and 85)

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The UCLA Internet Report 2001
Surveying the Digital Future
Year Two

Welcome to the report of Year Two of the UCLA Internet Project, "Surveying the Digital Future."

The UCLA Internet Project is a comprehensive, year-to-year examination of the impact of online technology on America. This work is part of the World Internet Project, which is organized and coordinated by the UCLA Center for Communication Policy. Included in the World Internet Project are UCLA's work and partner studies in countries in Europe, the Middle East, South America, and Asia.

The second UCLA Internet Report continues to explore how the Internet influences the social, political, and economic behavior of users and non-users. With the completion of the 2001 study, we are working on one of the principal goals of the UCLA Internet Project: to compare the evolving responses of Internet users and non-users over the years.

**THE UCLA CENTER FOR COMMUNICATION POLICY:
EXPLORING THE IMPACT OF THE INTERNET**

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

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

To achieve this objective, The UCLA Internet Project surveys more than 2,000 households across America, compiling the responses of Internet users and non-users. Each year we contact the same households to explore how online technology affects the lives of those who are continuing Internet users, those who remain non-users, and those who move from being non-users to users. We will also note changes as continuing users move their Internet access from modem to broadband.

The UCLA Internet Project is not restricted to investigating a particular method of accessing the Internet. As new types of access – such as wireless or methods yet unknown – become available, the project will track them. The project is open to exploring the Internet in any form, and will monitor online technology as it transforms in yet-unexpected ways.

WHY A COMPREHENSIVE REPORT ON THE INTERNET?

Other studies examine the Internet from a variety of viewpoints. The UCLA Internet Project differs from most other studies in five principal areas:

- **The UCLA Internet Project looks at the social impact of the Internet**

Most Internet studies gathers data about who is online, how long they are online, and what they do online. The UCLA 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 attitudes and behavior. The UCLA study comprehensively tracks a wide range of values, behavior, attitudes, and perceptions.

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

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

- **Year-to-year data**

The UCLA Internet Project comprehensively examines the effects of this communication technology over the course of many years – ideally an entire generation. The research team maintains a core sample of respondents, and tracks short-term and long-term changes in behavior, lifestyle, attitudes, and Internet use.

- **A worldwide effort**

The UCLA Center for Communication Policy created and organizes the World Internet Project, which includes the UCLA Internet Project and similar studies in countries worldwide (for contacts at many of the worldwide partners, see page 92). Through this team of international partners, the World Internet Project studies and compares changes associated with the Internet in different countries and regions, creating an international picture of evolving change in online technology and use.

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

For this project to be truly effective, we involve public and private organizations that are committed to using our results. We organized an unprecedented alliance of corporations – several of which are direct competitors – and foundations, including the National Science Foundation, America Online, Microsoft, Disney, Sony, Verizon, Pacific Bell, DirecTV, Hewlett-Packard, Merrill Lynch, Accenture, and the National Cable Television Association.

THE UCLA INTERNET PROJECT: KEY AREAS

The 2001 UCLA Internet Project includes findings that compare Internet users to non-users, new users (less than one year online) to very experienced users (five years or more online), and users within different demographic groups.

The Survey is organized into five general subject areas:

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

The 2001 UCLA Internet Report includes a broad sampling of more than 100 major issues from this year's survey. We hope you will be enlightened by these findings in year two of "Surveying the Digital Future," as we work to understand how the Internet is transforming our world.

Jeffrey I. Cole, Ph.D.
Director, UCLA Center for Communication Policy
Founder and Organizer, World Internet Project

THE UCLA INTERNET REPORT 2001

Surveying the Digital Future

YEAR TWO

INTERNET USERS AND NON-USERS

WHO IS ONLINE? WHO IS NOT?

WHAT ARE USERS DOING ONLINE?

Who is using the Internet in 2001? How do online experiences of new users (less than one year using the Internet) differ from those of very experienced users (five or more years on the Internet)? Why do non-users stay off of the Internet?

The 2001 UCLA Internet Project leaves little doubt that the Internet is now a mainstream activity in American life that continues to spread among people across all age groups, education levels, and incomes:

- **The UCLA Internet Project found that 72.3 percent of Americans are online in 2001, up from 66.9 percent in 2000.**
- **Users in 2001 go online about 9.8 hours per week, up from 9.4 hours per week in 2000.**

The majority of Americans have access to the Internet, and that access continues to grow. Who, then, is going online, and who is not? And, how are Americans using the Internet?

INTERNET ACCESS AND USE: 2000 AND 2001

Who is using the Internet? Where do users access it? What services do they use?

The 2001 UCLA Internet Report found continuing growth in use of the Internet; more than 70 percent of Americans have access to the Internet in 2001.

INTERNET ACCESS

	2000	2001
■ Total Americans who use the Internet	66.9%	72.3%
■ % of students who use the Internet at school	55.3%	64.3%
■ % of employed who use the Internet at work outside the home	42.3%	51.2%

THE TOP FIVE MOST POPULAR INTERNET ACTIVITIES (PERCENT OF INTERNET USERS)

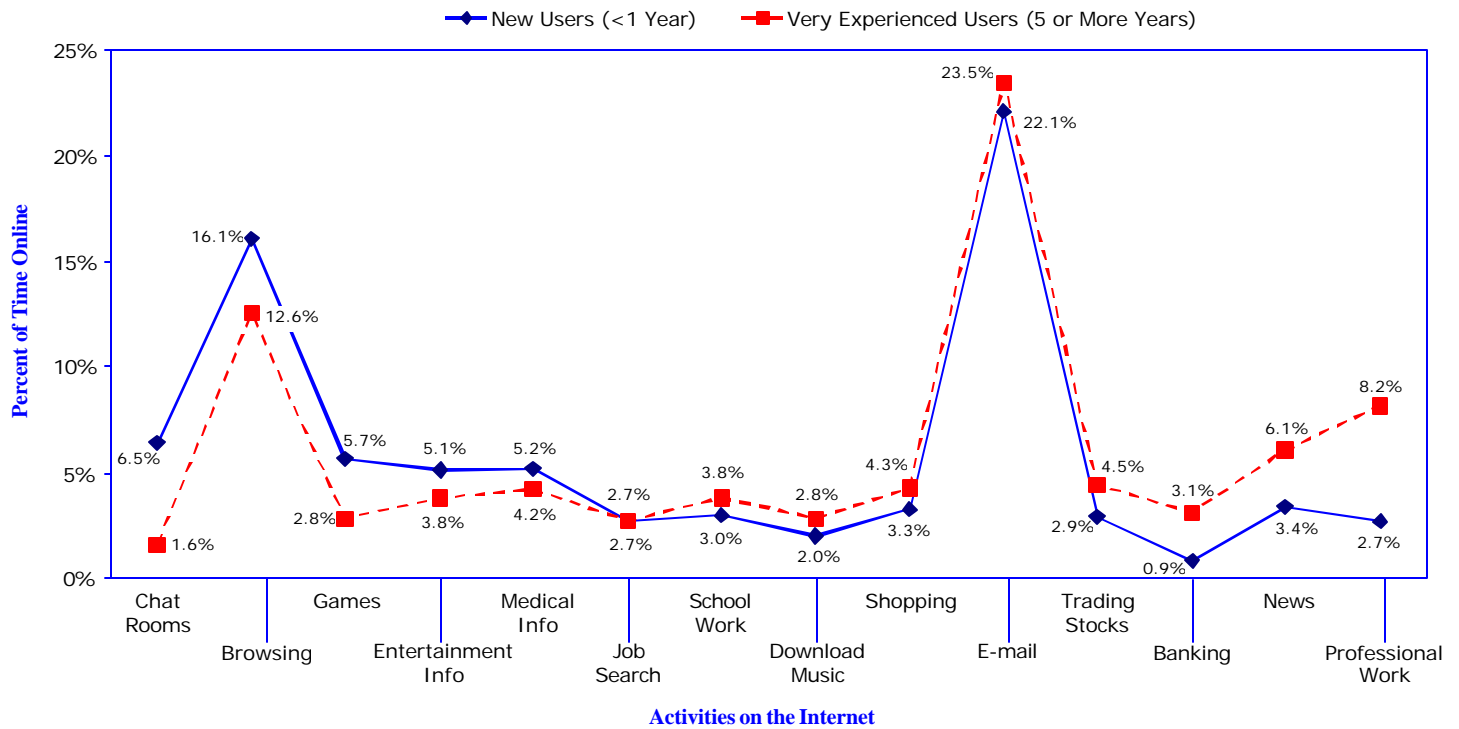
1. E-mail and instant messaging	81.6%	87.9%
2. Web surfing or browsing	81.7%	76.3%
3. Buying online	50.7%	48.9%
4. Finding entertainment information	54.3%	47.9%
5. Reading news	56.6%	47.6%

ONLINE SPENDING PER MONTH (PERCENTAGE OF PURCHASERS ONLY)

■ \$0-\$15	21.5%	36.2%
■ \$15-\$175	59.8%	55.4%
■ \$175+	18.7%	8.4%

NEW USERS VS. VERY EXPERIENCED USERS: WHAT DO THEY DO ONLINE?

In both the 2000 and 2001 UCLA Internet Projects, one of the most revealing findings compares the online activities of new users (less than one year online) with those of very experienced users (five or more years in 2001, four or more years in 2000).



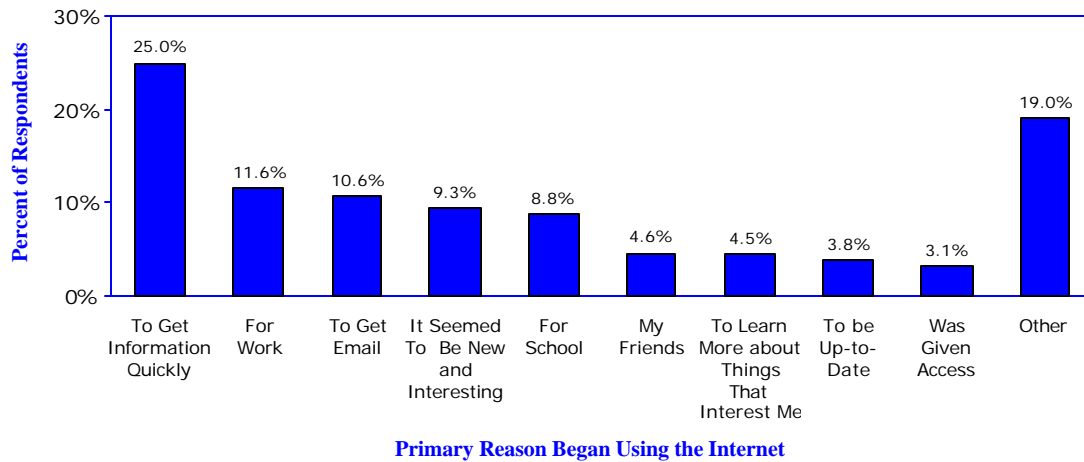
Very experienced Internet users spend a larger proportion of time online sending e-mail, doing professional work, looking for news, or trading stocks. New Internet users spend a greater proportion of their time visiting chat rooms, playing games, and browsing online.

The largest differences between new users and very experienced users are participating in chat rooms (accessed much more by new users) and doing professional work (done far more by experienced users).

Usage patterns in both the 2000 and 2001 surveys show that a new divide is emerging: the difference between how those with several years of experience and those with little experience online actually use the Internet.

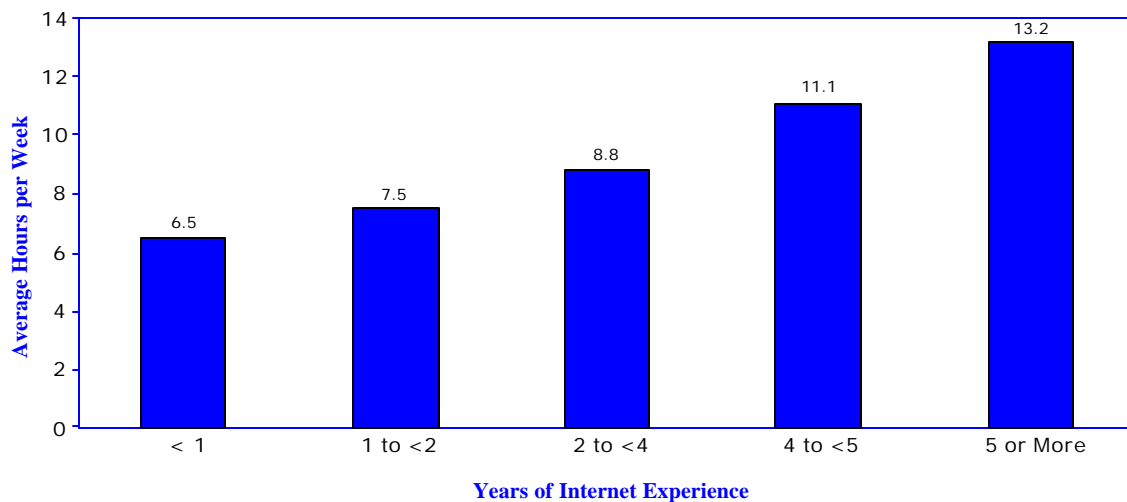
GOING ONLINE: THE PRIMARY REASON

What do users say is the primary reason they started to use the Internet? At the top of the list of reasons is obtaining information quickly, followed by work needs, and access to e-mail.



INTERNET USE: HOW OFTEN ARE YOU ONLINE?

As in the 2000 study, the 2001 UCLA Internet Project found that the more experience users have with the Internet, the more time they spend online. With each additional year of Internet experience, users' time online grows; very experienced users are online almost twice as long as new users.

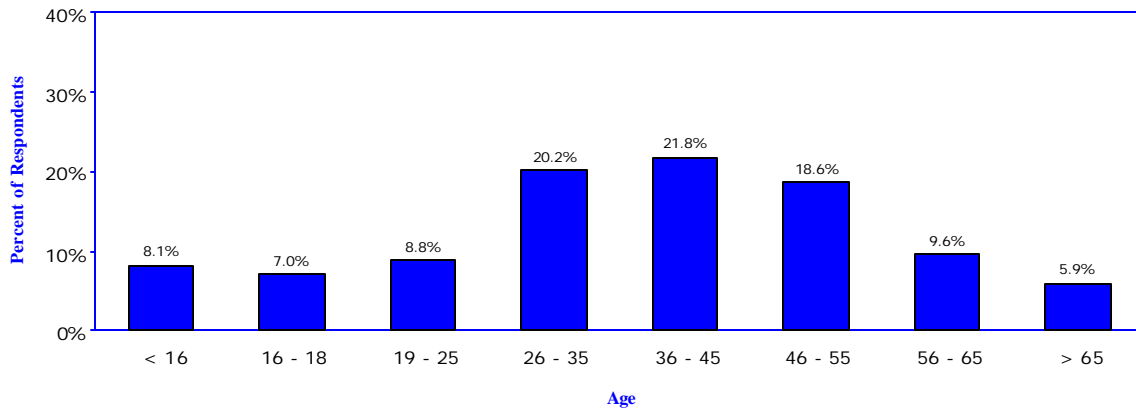


Worth noting is the amount of time that even the new Internet users are online: an average of 6.5 hours per week in the 2001 survey, up from 6.1 hours per week in 2000. Internet users – even new ones – acquire this time from hours previously devoted to some other activity.

For more about how the time users spend on various activities is changing, see page 30.

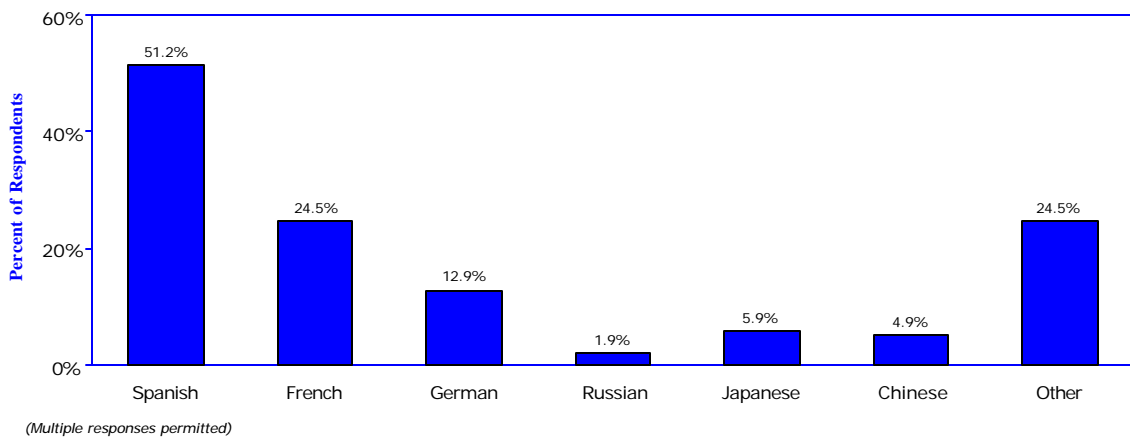
INTERNET USE: ACROSS ALL AGE RANGES

The 2001 survey, as well as the survey in 2000, found that Internet use is not dominated by young people. Respondents aged 18 and under account for only 15.1 percent of Internet users. Users span all age ranges, with 60.6 percent in the 26-55 age range.



WHAT LANGUAGE DO YOU USE ONLINE?

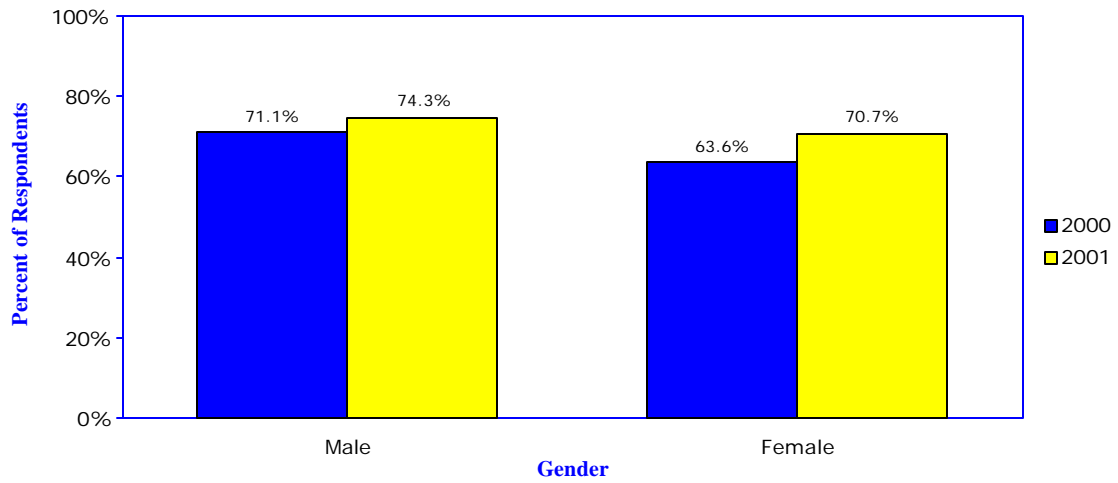
In the United States, the predominant language of the Internet is English. Of those whose primary language online is English, 7.3 percent report also using a language on the Internet other than English.



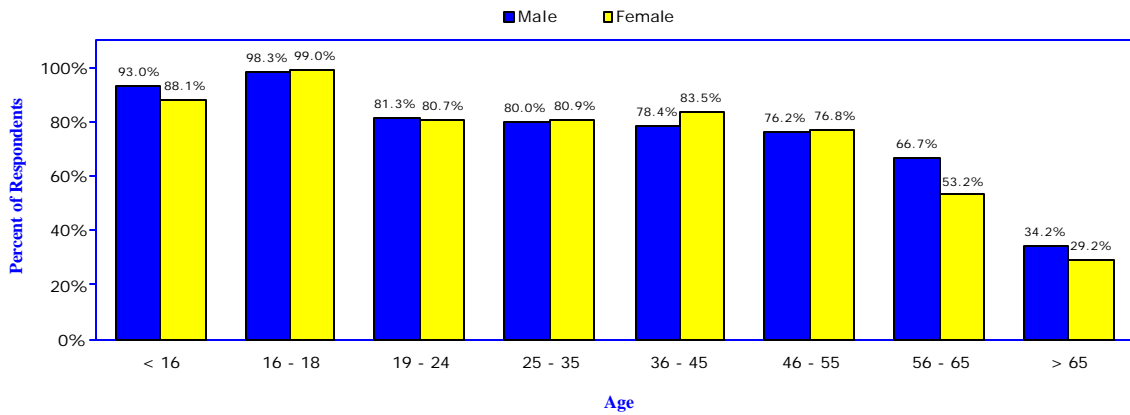
More than half of online use not in English is conducted in Spanish, and slightly less than one-quarter is in French.

MEN AND WOMEN ONLINE

Almost equal numbers of men and women use the Internet.

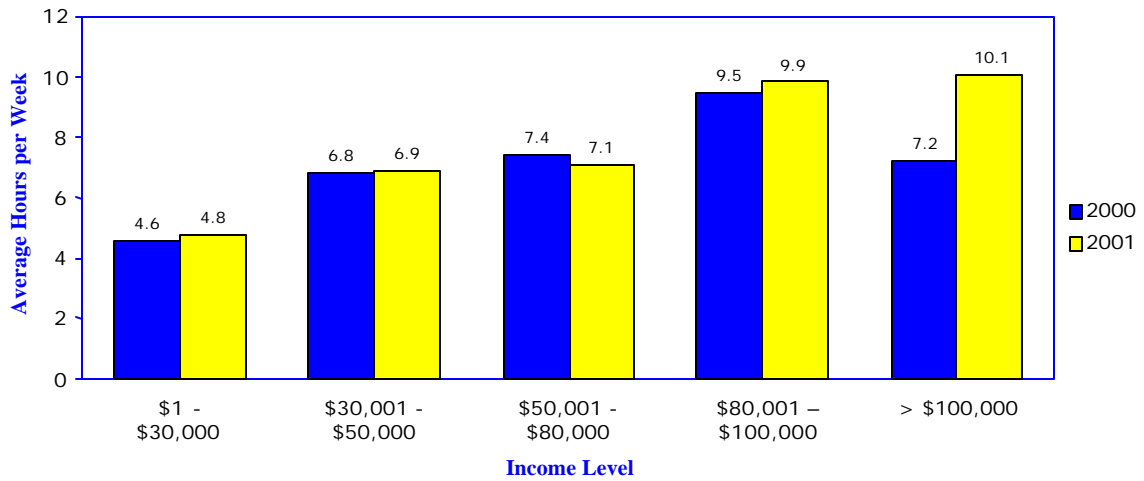


In most age ranges (see chart below) Internet use is about equal among men and women.



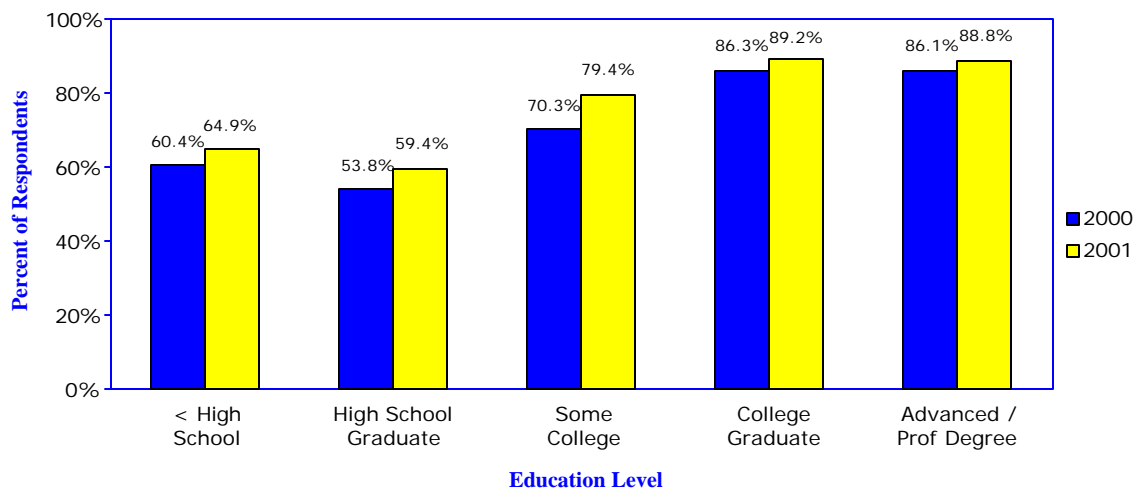
INCOME AND INTERNET USE

In 2001, as in 2000, in general the higher the income, the higher the proportion of those who use the Internet. And those with higher incomes have been online longer than those with lower incomes.



EDUCATION

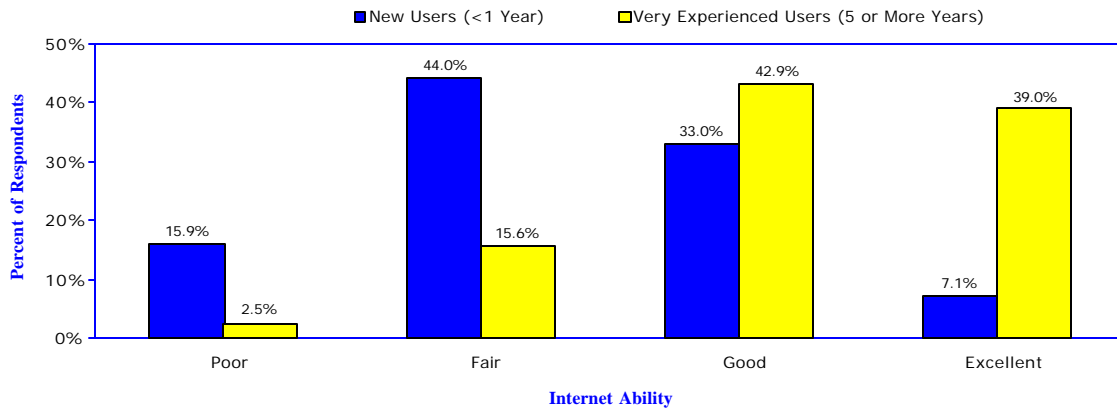
The 2000 and 2001 surveys found increases in Internet use among those at all education levels. And, for both years, the higher the education level achieved by respondents, the more likely they use the Internet.



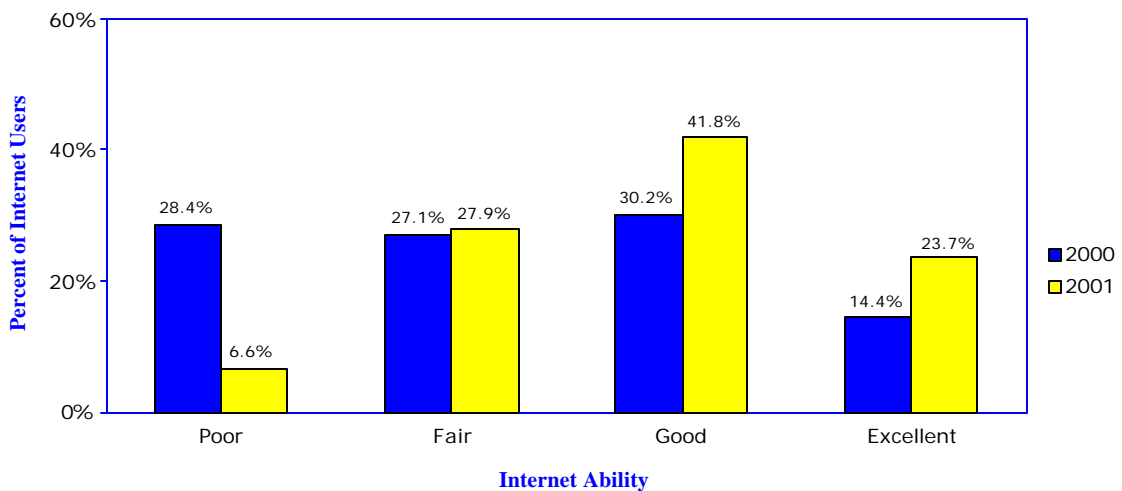
The very highly educated have correspondingly high levels of use. However, the largest growth rates from 2000 to 2001 were among those with some college (9.1 percent increase) and those with a high school degree only (5.6 percent increase).

HOW WOULD YOU RATE YOUR ABILITY TO USE THE INTERNET?

As expected, confidence using the Internet grows as experience grows; 81.9 percent of users with five or more years of experience say their Internet abilities are good or excellent, compared to 40.1 percent of users with less than one year of experience.

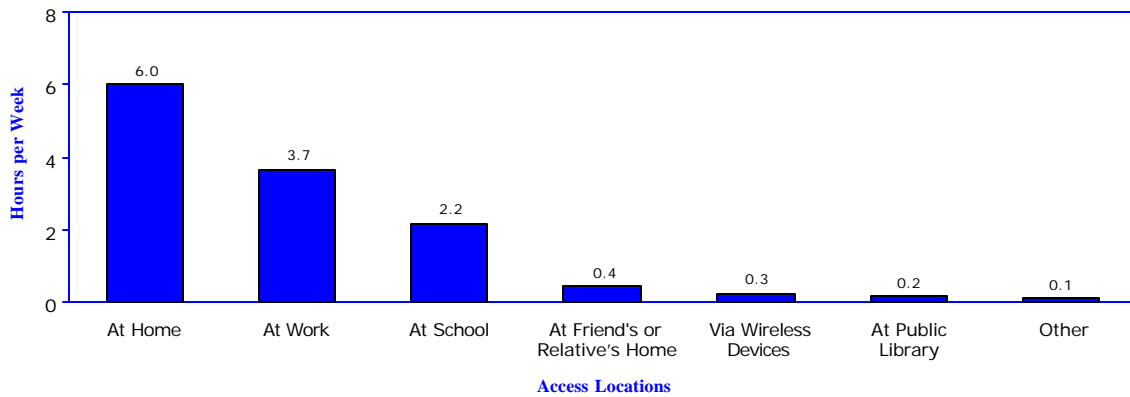


The survey also found that overall confidence in using the Internet has grown (see chart below). In the 2001 survey, 65.5 percent of all users say their ability to use the Internet is good or excellent, up substantially from the 44.6 percent who responded the same way in 2000.



WHERE DO YOU USE THE INTERNET?

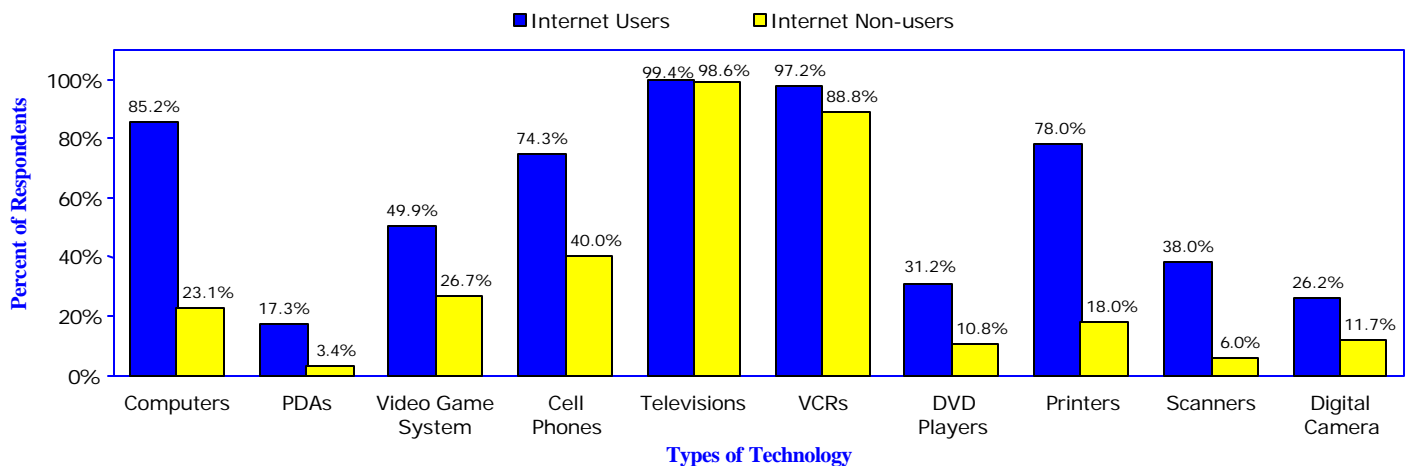
Not surprisingly, the home remains the primary point of access to the Internet for most people. In 2001, users report the most hours online at home, followed by work, and then school.



ELECTRONIC DEVICES

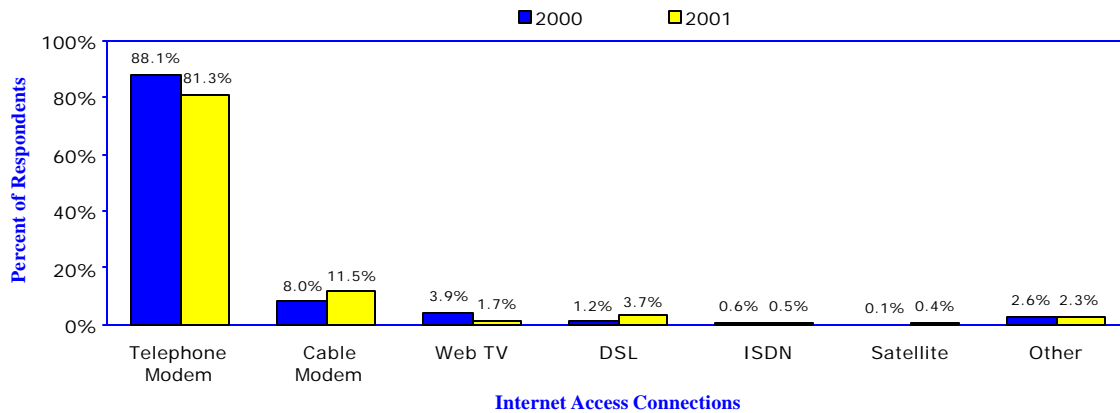
Internet users own much more electronic technology than non-users.

Equal percentages of users and non-users own televisions, and slightly higher numbers of users own VCRs. However, much higher percentages of users than non-users own electronic devices in every other major category.



HOW DO YOU CONNECT TO THE INTERNET?

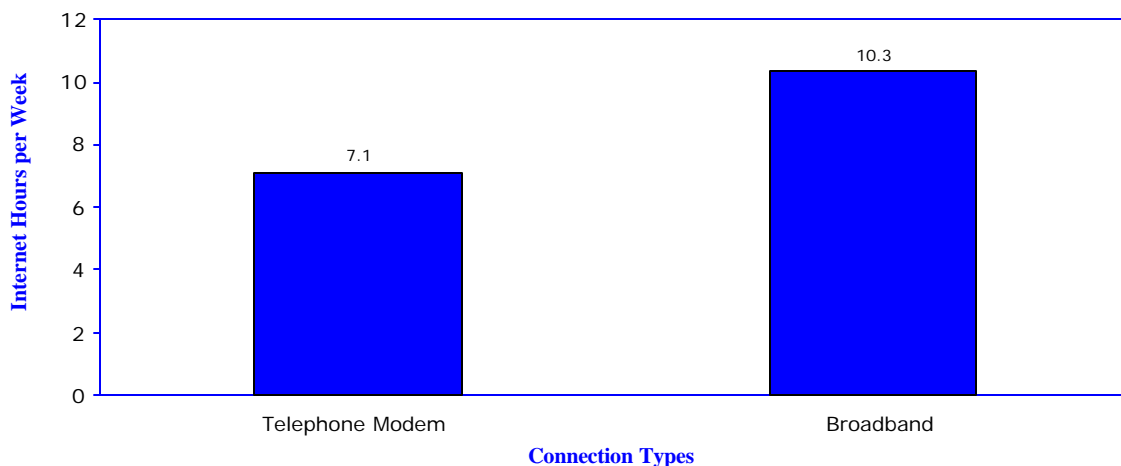
Most households with Internet access still connect to online service with a telephone modem. Even though telecommunications companies are now aggressively marketing cable modems and DSL, access by telephone modem declined only 6.8 percent in 2001.



Access by cable modem also grew slightly, and DSL use grew substantially in 2001 – but up from a very low level in 2000.

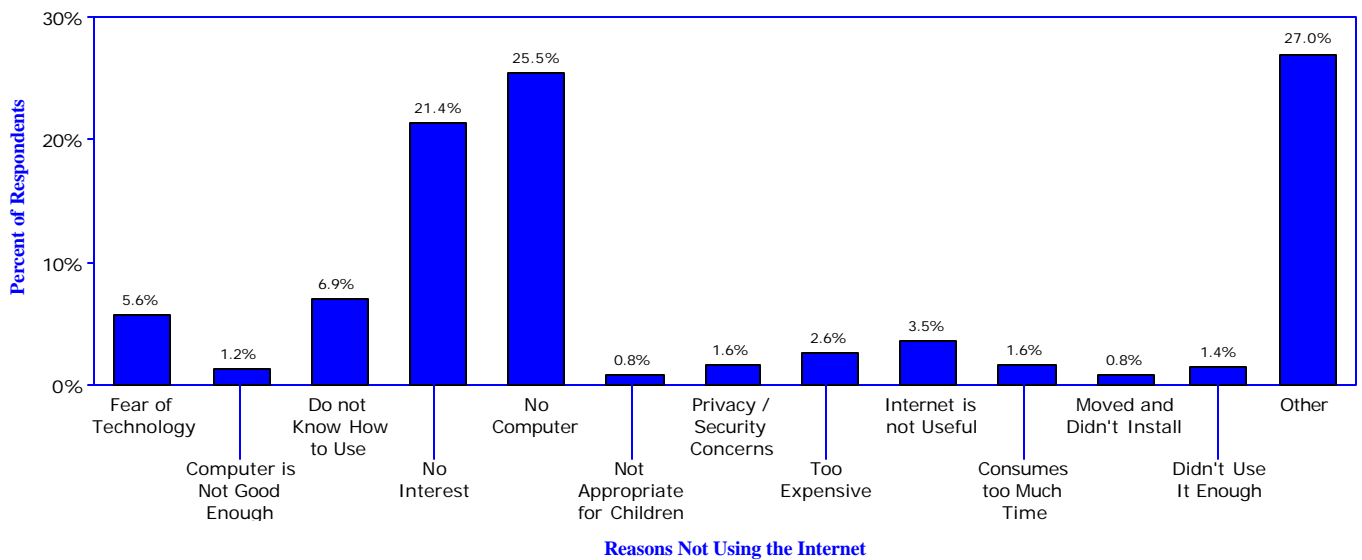
MODEM VS. BROADBAND: HOW LONG ONLINE?

Even though – or perhaps because – access to the Internet with broadband is much faster than access with a telephone modem, Internet users with broadband at home go online 3.2 hours more per week than Internet users who connect with a telephone modem.



NON-USERS: WHY NOT ONLINE?

The 27.7 percent of Americans who do not currently use the Internet in 2001 express a range of reasons for not being online. As in 2000, the primary reason is lack of access; 26.7 percent of respondents who do not use the Internet say they do not have a computer or an adequate computer.

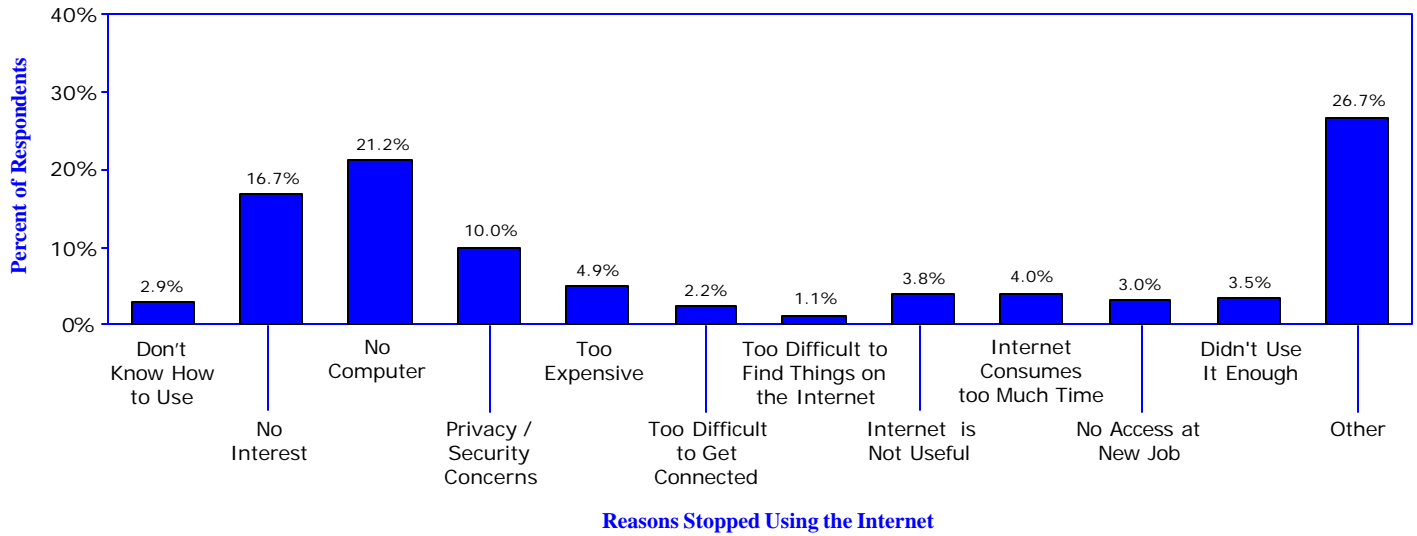


Lack of interest in the Internet is the second most cited reason in the 2000 and 2001 surveys, but the number of those who say they are “not interested” is declining. In 2001, 21.4 percent of non-users say they are not online because they are not interested, a drop from 33.3 percent in 2000.

Two other relatively frequent responses are “I don’t know how to use the Internet” and “fear of technology.” There was a wide variety of other responses to this question, including, “Because I’m retired and I’m just relaxing,” “I just don’t want to fool with it,” “I found the information I needed, so I don’t need it anymore,” and “Because I’m an addictive type, and once I started, I would do nothing else.”

ELECTRONIC DROPOUTS: WHY?

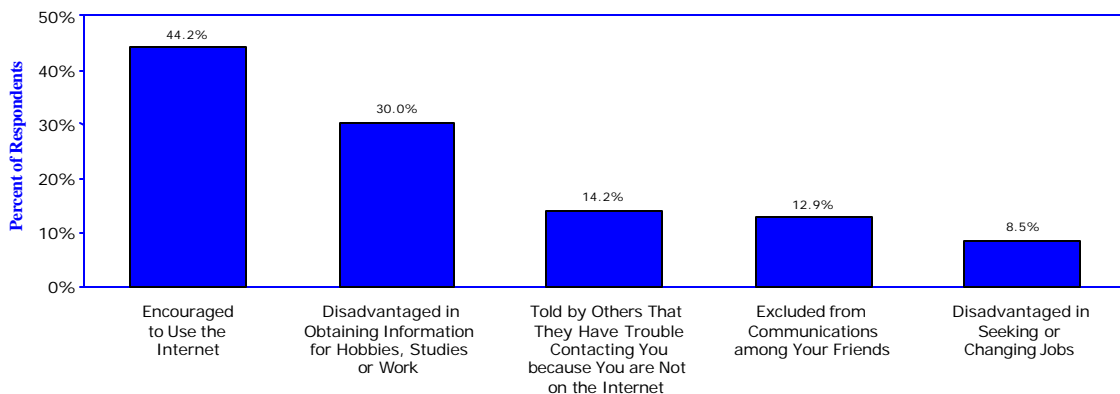
“Electronic dropouts” – Internet non-users who were once users – report a range of reasons for no longer going online.



The primary reason given by dropouts for not using the Internet is the same as the general response of those who do not currently use the Internet: “no computer available.” Other major reasons for dropping out are “no interest,” “privacy concerns,” and “too expensive.”

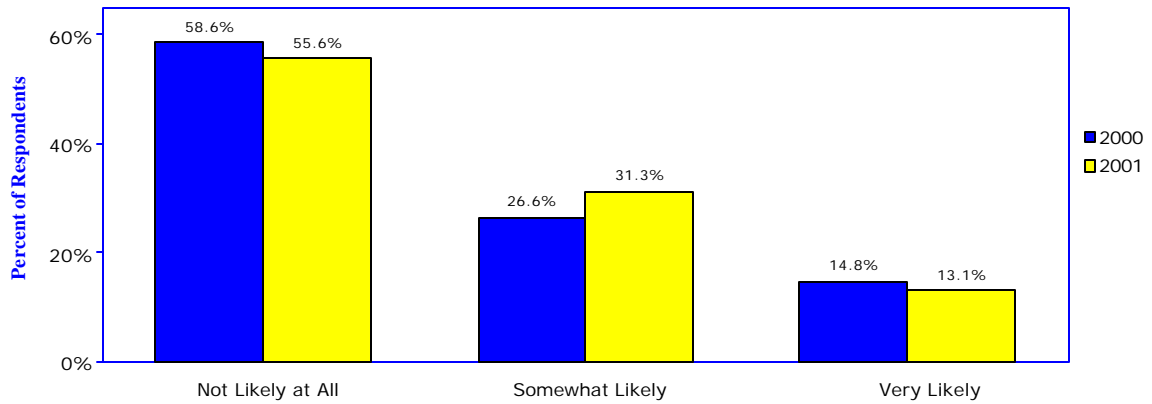
EXPERIENCES OF NON-USERS

A new question in the 2001 UCLA Internet Project explores the experiences non-users have had that are related to the Internet. Of the list of experiences, the most frequently encountered is being encouraged to use the Internet (presumably by users), followed by being disadvantaged because they cannot obtain information for hobbies, studies, or work.



NON-USERS: WILL YOU LOG ON SOON?

Will Internet non-users become users in 2002? Of the 27.7 percent of respondents who do not currently use the Internet, 44.4 percent say they are somewhat likely or very likely to go online next year – up slightly from 41.4 percent of non-users responding the same way in 2000.



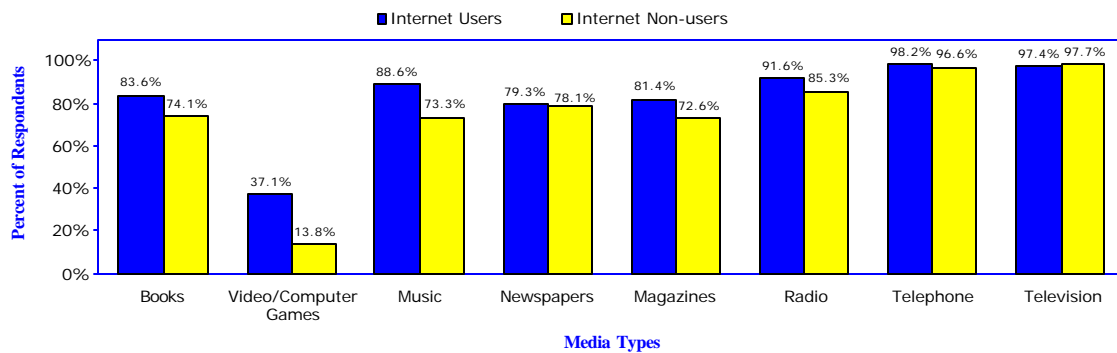
However, more than half (55.6 percent) of non-users continue to say they are not likely to access the Internet in the next year.

MEDIA USE AND TRUST

Is the Internet replacing the use of other media? How is leisure time being affected by the Internet?
Is television viewing changing because of the Internet? Is the Internet valued as a source of information?
Do users trust what they find online?

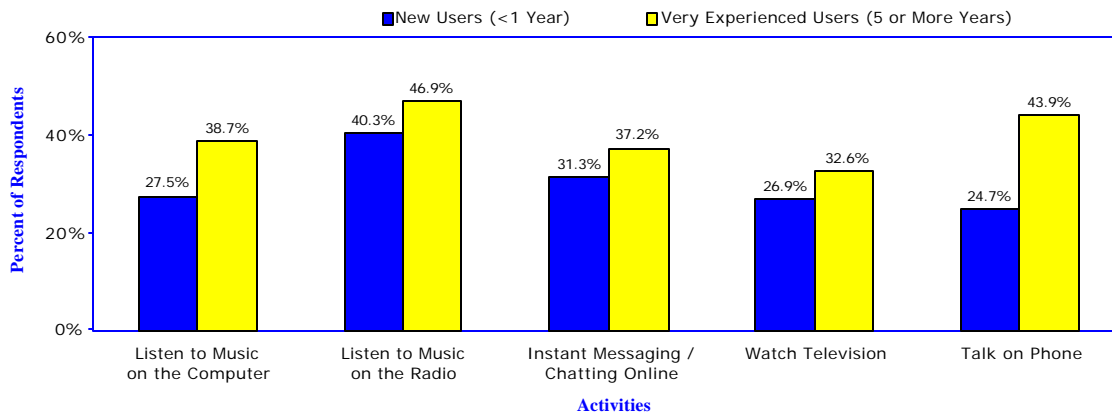
MEDIA USE

As in 2000, the 2001 UCLA Internet Report found that Internet users employ substantially more media than non-users. The only media used more by a larger percentage of non-users than users is television.



INTERNET USERS AND MULTI-TASKING

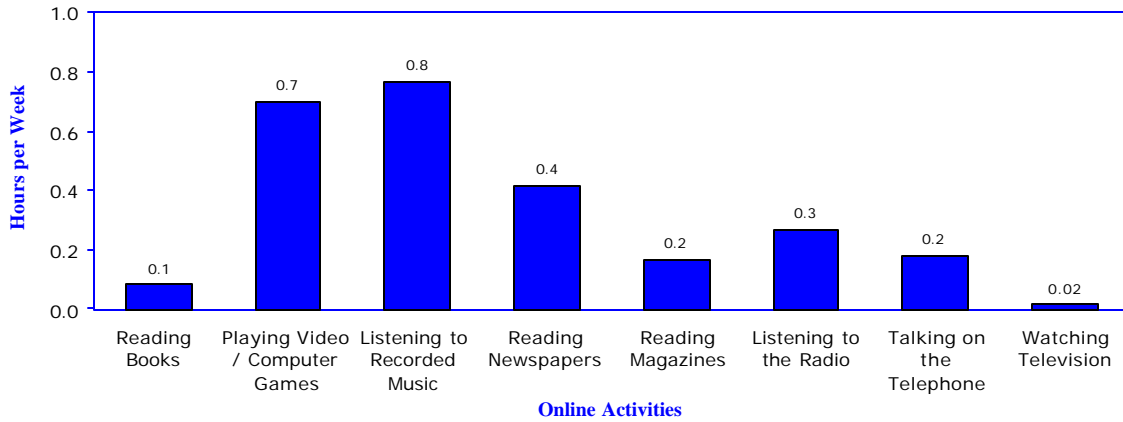
A new question for the 2001 survey explores the types of activities – both online and offline – that users engage in while they are also on the Internet.



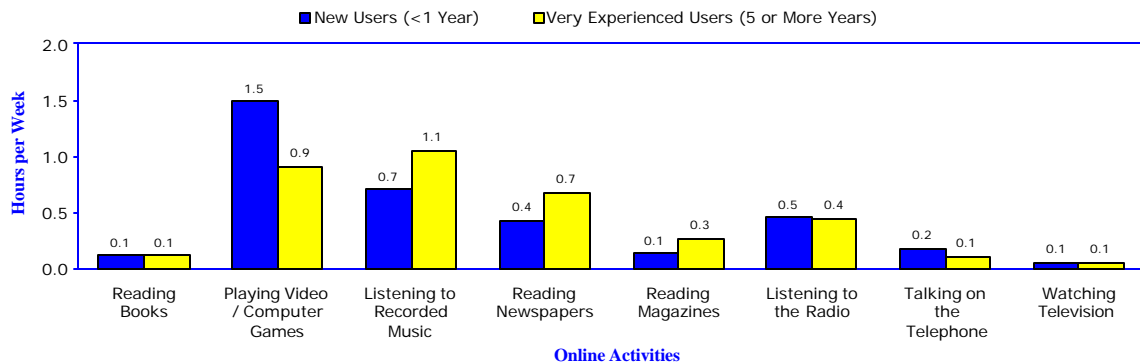
While online, new users and very experienced users involve themselves in many other communication activities, especially listening to music on the radio, listening to music on the computer, sending instant messages, chatting online, and talking on conventional telephones. Very experienced users are more likely than new users to be involved in these communication activities while online.

INTERNET USERS AND ONLINE MEDIA

Some activities previously done offline are now beginning to move onto the Internet, such as reading books and newspapers, listening to online radio, and using Web telephones.

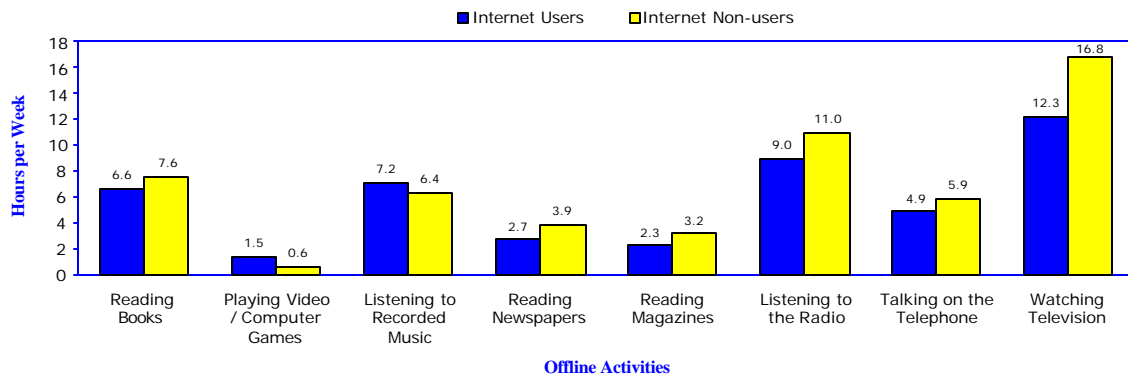


While online, new users spend more time than very experienced users playing games, and slightly more time talking on Web telephones (see the chart below). Very experienced users more than new users access online recorded music (such as MP3 files) and online newspapers and magazines.



TELEVISION: VIEWING DECLINES AMONG INTERNET USERS

When not online, Internet users spend a little less time than non-users reading books, and more time playing video games. Users listen to more recorded music than non-users, but listen to less radio. Users watch significantly less television than non-users.

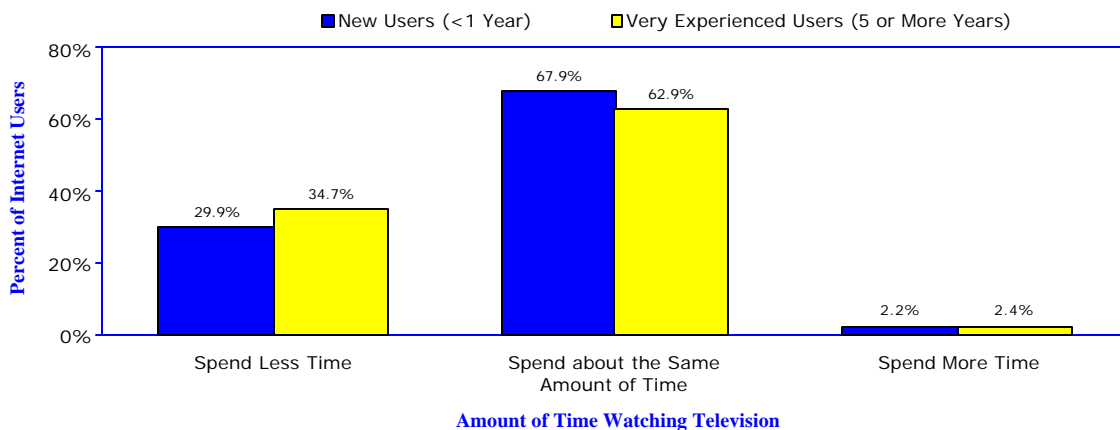


The biggest gap between users and non-users is television viewing time.

Although Internet users and non-users have access to television in almost equal numbers, the number of hours spent watching each week varies considerably between users and non-users. Both the 2000 and 2001 studies confirm that Internet users watch significantly less television than non-users.

In the 2001 study, users watch 4.5 hours per week less television than non-users. And, television viewing decreases as Internet experience increases (see the chart below).

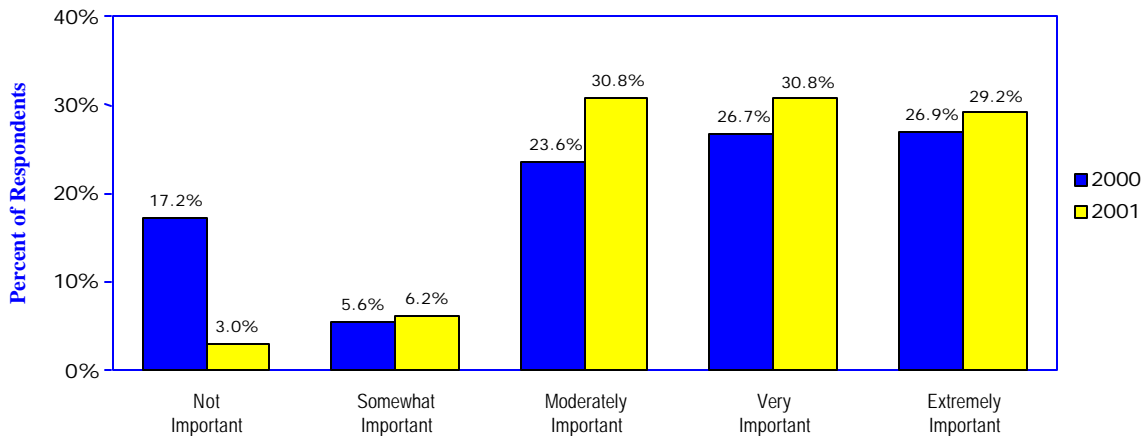
It seems that Internet users may find the time to go online by reducing their television viewing. For other questions that explore declining television use, see pages 68, 69, 76, and 78.



THE INTERNET: AN IMPORTANT SOURCE OF INFORMATION?

One of the most revealing questions in the 2001 UCLA Internet Project explores how users view the Internet as a source of information and entertainment.

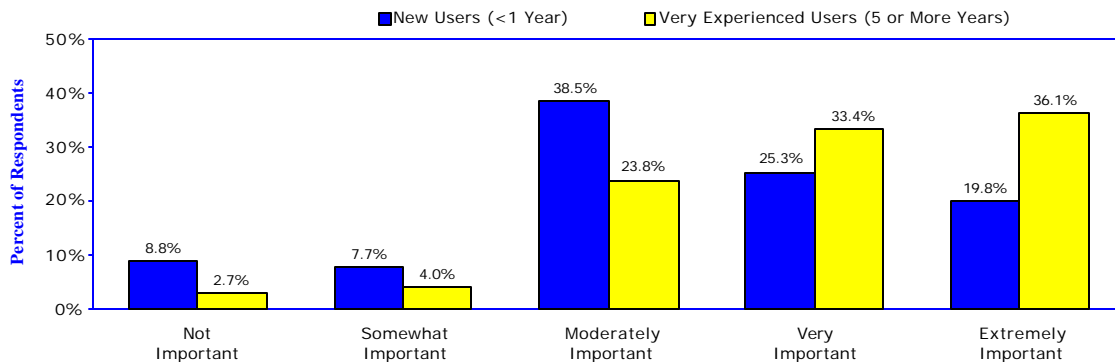
After little more than six years as a widespread communication tool, the Internet is viewed as an important source of information by the vast majority of people who use the online technology.



Internet as Source of Information

The importance of the Internet as a source of information is growing among users. In 2001, 60 percent of all users consider the Internet to be a very important or extremely important source of information, up from 53.6 percent in 2000. Add those who say moderately important, and the total increases to 90.8 percent for 2001, up from 77.2 percent in 2000.

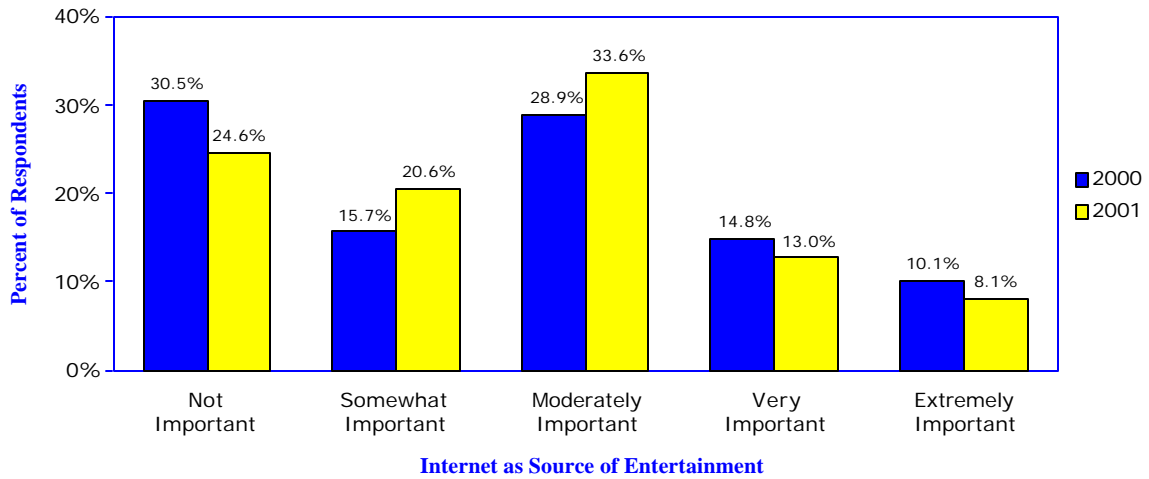
Even the newest users believe that the Internet is an important source of information (see chart below); 45.1 percent of users with less than one year of experience online consider the Internet to be a very important or extremely important source of information – a notable statistic about an audience with less than 12 months of experience online.



Internet as Source of Information

THE INTERNET: HAS IT PEAKED AS A SOURCE OF ENTERTAINMENT?

While increasing numbers of users believe the Internet is an important source of information, the perceived value of online content as an important source of entertainment is roughly unchanged from 2000.



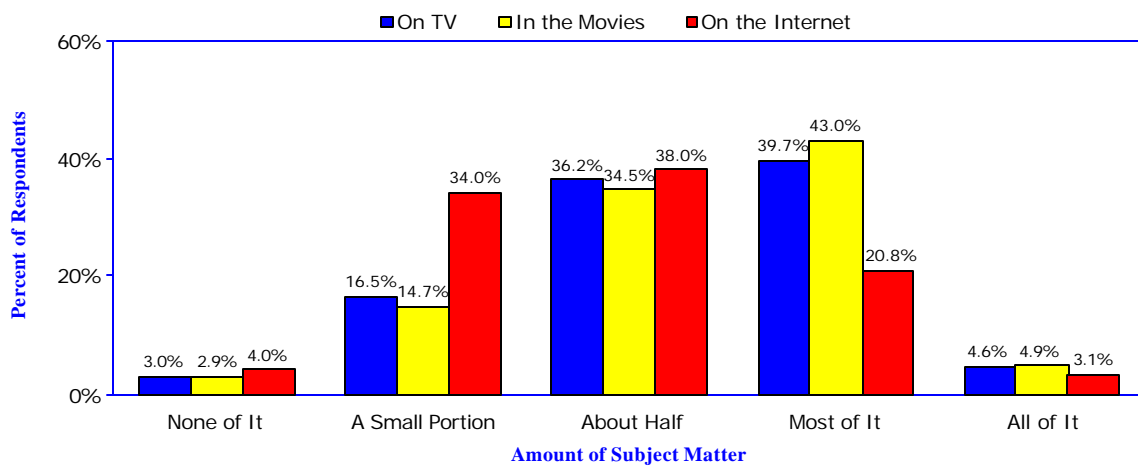
In 2001, 54.7 percent of users say the Internet is at least a moderately important source of entertainment, up only slightly from 53.8 percent in 2000. The number of users who think the Internet is a very important or extremely important source of entertainment is 21.1 percent, down from 24.9 percent in 2000.

Has the Internet peaked as an entertainment source? This issue will be a source of continuing study in upcoming surveys.

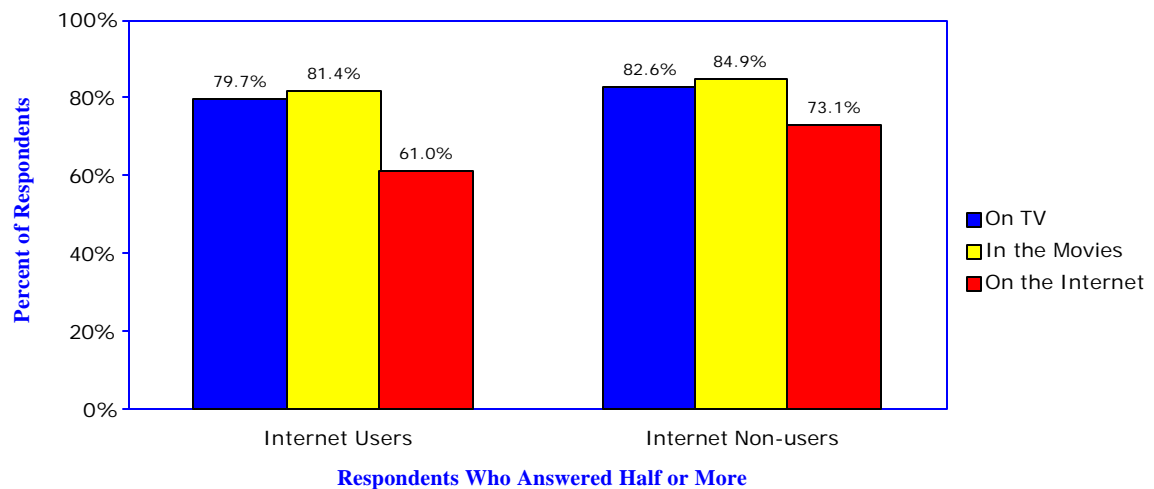
MEDIA AND SEXUAL CONTENT

A new question for 2001 asks about the amount of sexual content on television, in movies, and on the Internet.

Large percentages of respondents say that at least half of the subject matter found in all of these media contains too much sexual content. Respondents who say half or more of the subject matter has too much sexual content totaled 82.4 percent for movies, 80.5 percent for television, and 61.9 percent for the Internet.

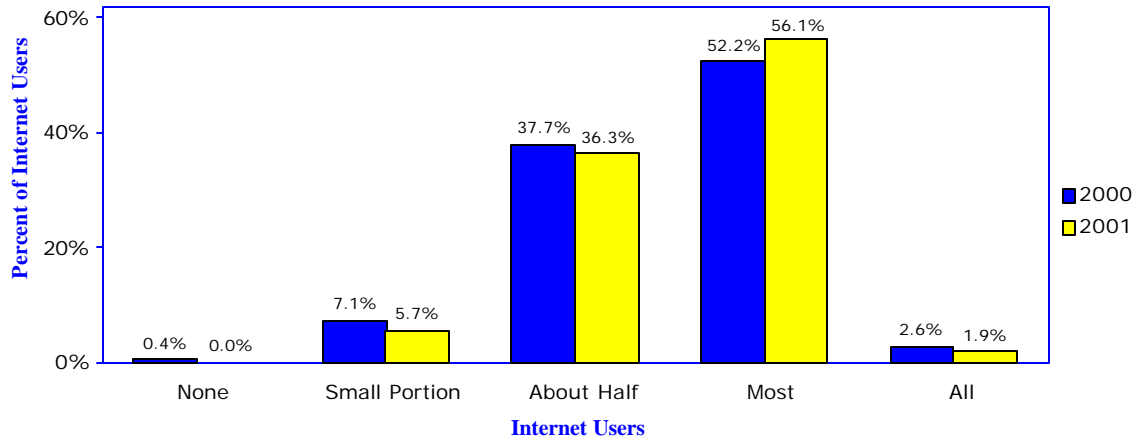


Slightly higher percentages of Internet non-users say that half or more of the content of these media has too much sexual content (see the chart below).



INFORMATION ON THE INTERNET: IS IT RELIABLE AND ACCURATE?

In 2001, 58 percent of users in 2001 believe that most or all of the information online is reliable and accurate – an increase from 54.8 percent in 2000. More than one-third of users say that about half of the information on the Internet is reliable and accurate.



At the negative extreme, 5.7 percent of users in 2001 say that a small portion or none of the information is reliable and accurate, down from 7.5 percent in 2000.

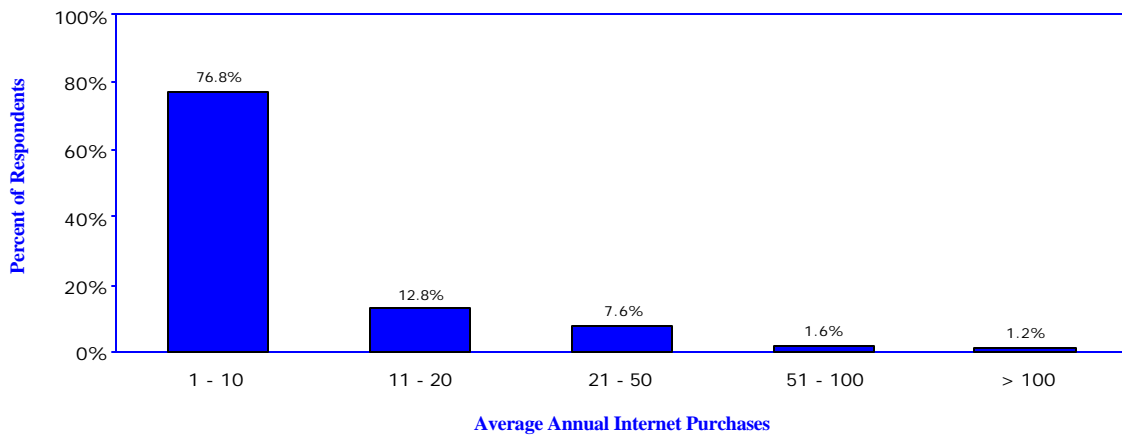
CONSUMER BEHAVIOR

Who is purchasing online, and why? Will dot-com failures and sluggish markets create significant change in consumer behavior online? Do Internet users continue to find differences between buying online and shopping at traditional “brick-and-mortar” retail stores?

While attitudes may be changing, one point found in the 2001 survey remains paramount: almost half of Internet users purchased online in 2001. In spite of a declining economy, uncertainty in online retailing, and continuing concerns about online privacy, 48.9 percent of Internet users made at least one online purchase in 2001, down from 50.7 percent in 2000.

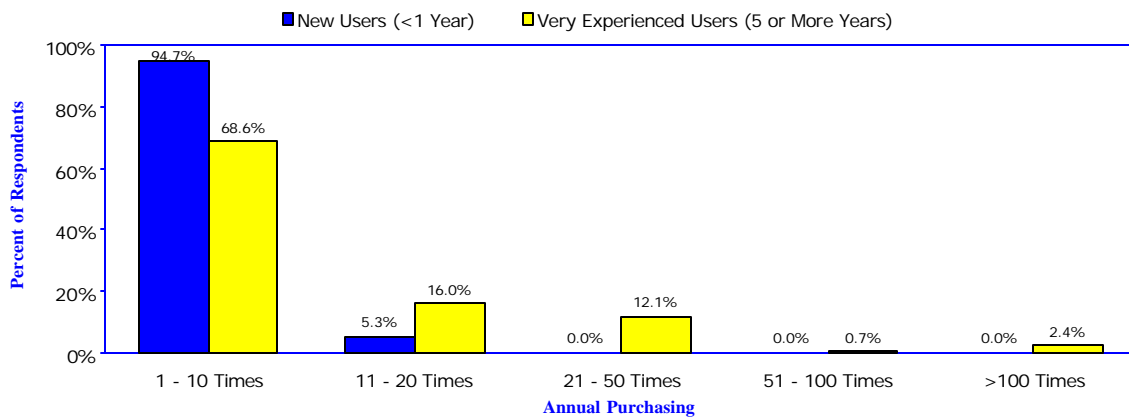
HOW OFTEN DO YOU BUY ONLINE?

More than three-quarters of users who purchase on the Internet in 2001 make 1-10 purchases per year. The majority of purchasers in 2001 bought less than 10 times. The average number of purchases is 12.



Very experienced Internet users are more likely to purchase than new users (see the chart below). Almost one-third (31.2 percent) of the most experienced users buy online 11 times per year or more.

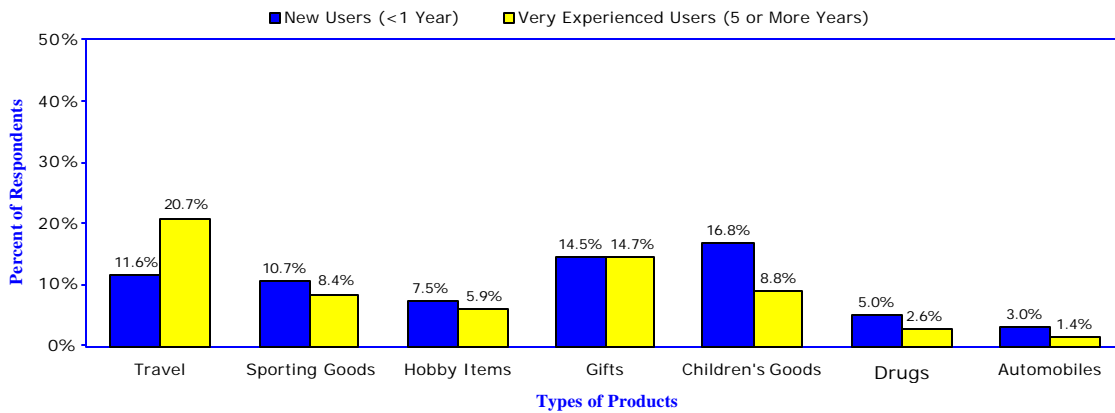
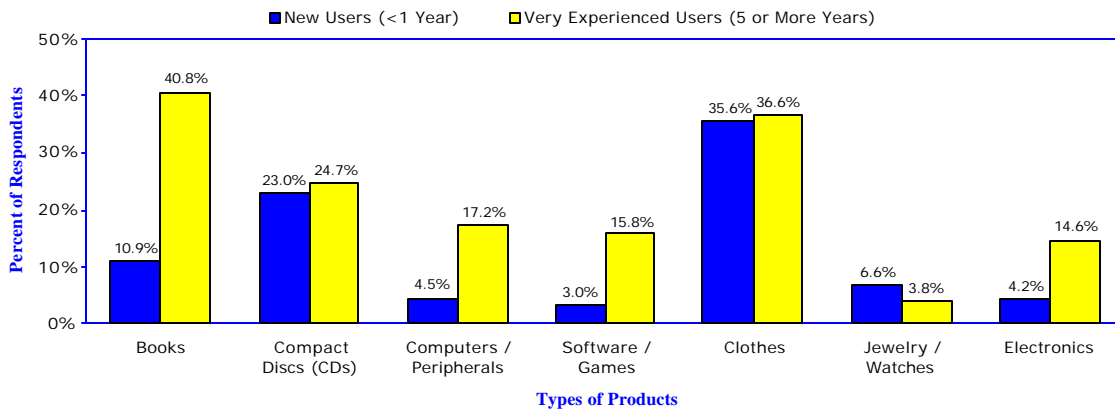
Very experienced users average 20 online purchases per year, compared to four purchases for new users.



WHAT DO YOU BUY ONLINE?

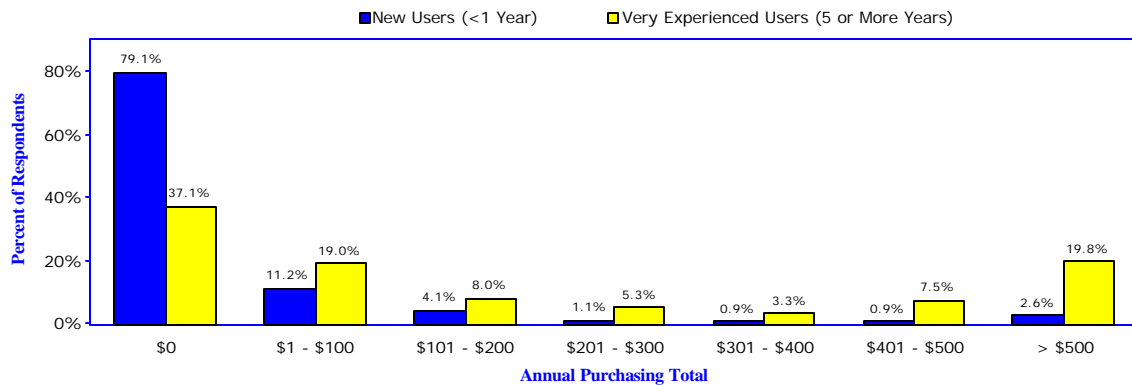
The types of products purchased online vary widely, especially when comparing the items purchased by those with different levels of online experience.

By far the biggest difference in purchasing habits is the percentage of very experienced users who buy books online, compared to new users. Very experienced users also buy more computer equipment, software, electronics, and travel arrangements and accommodations. New users are more likely to purchase jewelry or watches, sporting goods, children’s goods, drugs, and automobiles.



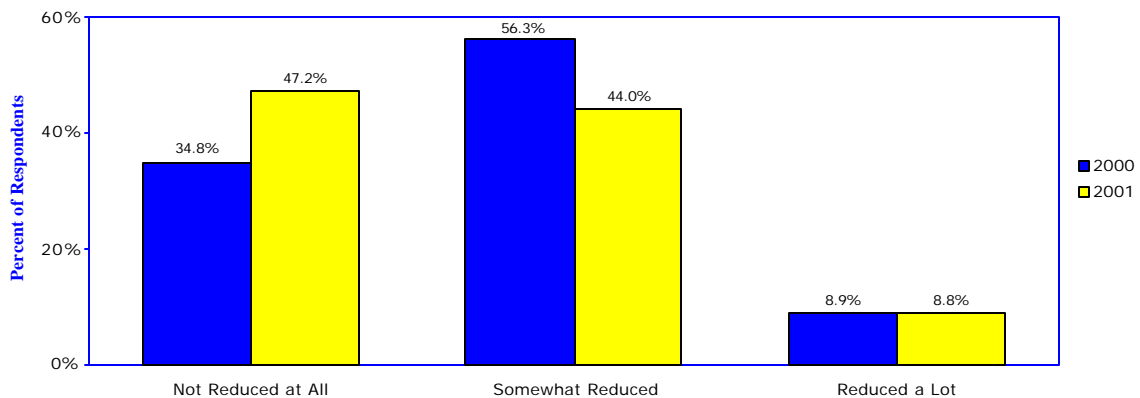
HOW MUCH DO YOU SPEND ONLINE?

Very experienced users spend more online than new users in every dollar category of spending.



INTERNET PURCHASING: DOES IT AFFECT BUYING IN RETAIL STORES?

Does buying online affect purchasing in traditional “brick-and-mortar” stores?



In 2001, online buying continues to replace some purchasing in retail stores for many Internet users, but at a lower level than in 2000.

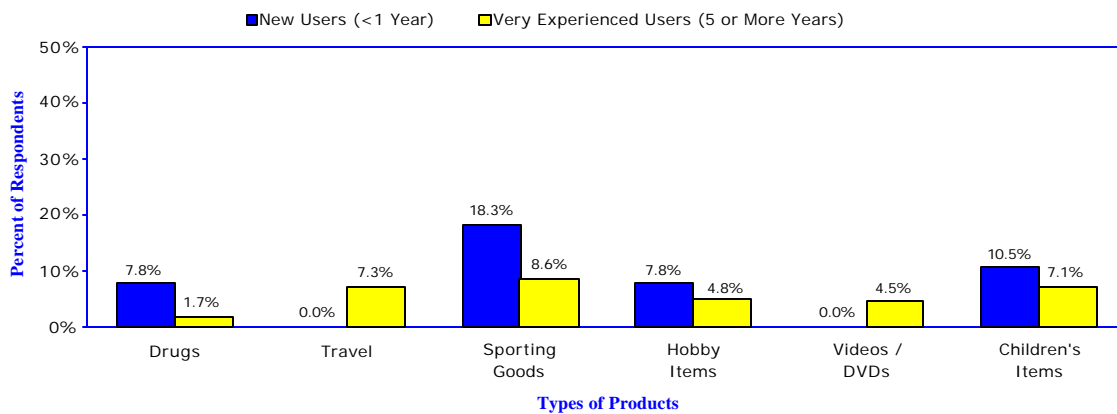
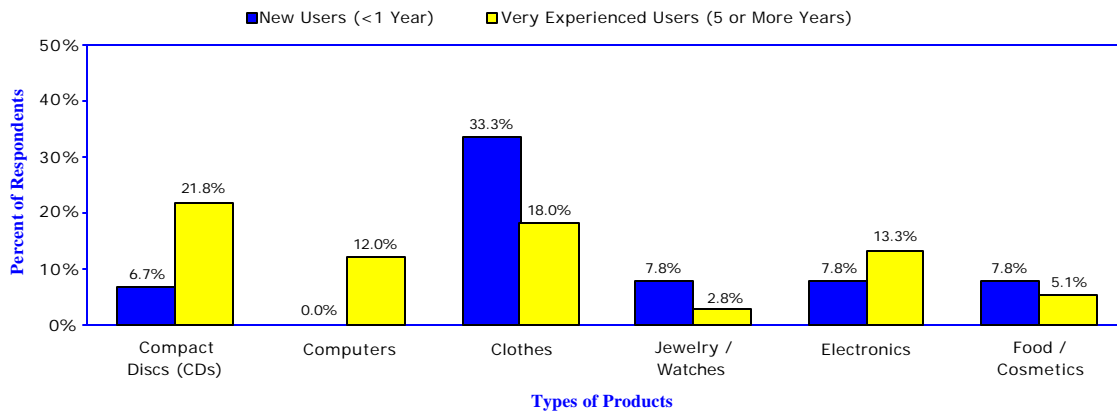
More than half of Internet purchasers in 2001 (52.8 percent) say that online purchasing has somewhat reduced or “reduced a lot” their purchasing from retail stores – down from 65.2 percent in 2000. However, those in 2001 who specifically say their retail purchasing was reduced a lot stayed virtually the same as in 2000.

Internet purchasers who say their buying online has not affected their local retail buying increased in 2001 to 47.2 percent, up from 34.8 percent in 2000.

WHAT ITEMS ARE NOW PURCHASED LESS OFTEN IN RETAIL STORES?

New users and very experienced users who buy online differ in how Internet shopping has reduced their retail purchases.

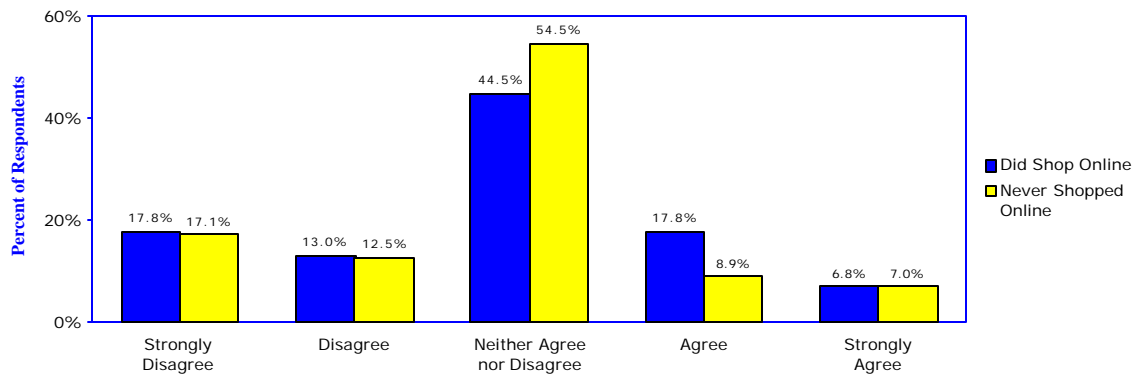
Larger percentages of new users report that they buy fewer clothes, sporting goods, and children's items in retail stores now that they purchase online. Very experienced users most frequently report reduced retail purchases of compact discs, clothes, electronics, and computers.



ARE PRICES ONLINE LOWER THAN TRADITIONAL RETAIL?

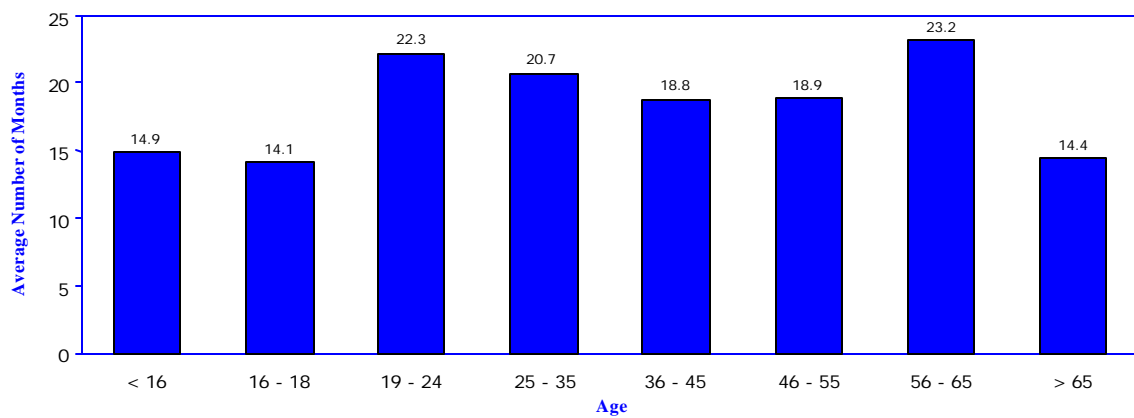
Internet purchasers do not consider the Internet a hunting ground for bargains. In 2001, 22.8 percent of Internet shoppers agree or strongly agree that prices online are lower than in traditional retail stores.

Among Internet users who do not shop online, 15.9 percent agree or strongly agree with this statement.



THE FIRST ONLINE PURCHASE: HOW LONG DID IT TAKE?

Most people do not buy online immediately when they first start using the Internet. In the 2001 survey, Internet purchasers were asked how long they waited after they became Internet users before they made their first online purchase.

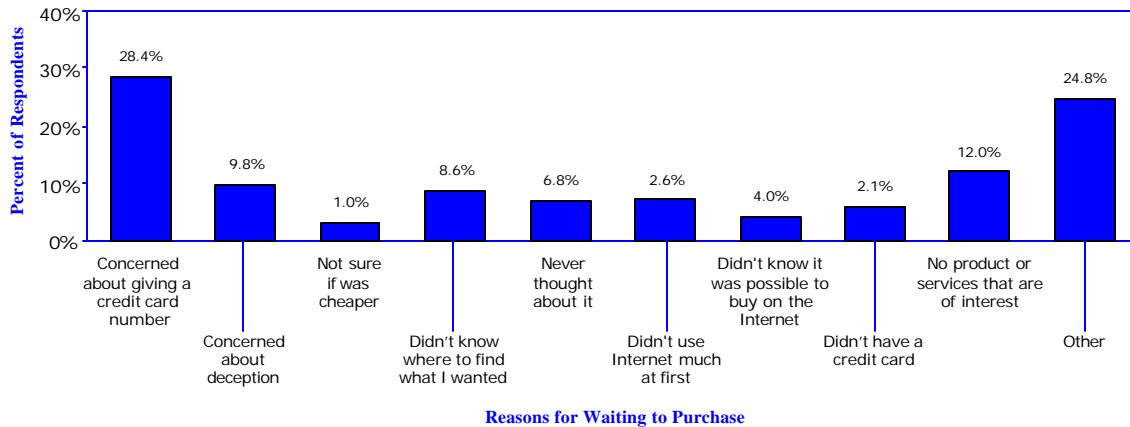


Looking at this question in terms of age, the longest amount of time was required by users 56-65 years old, who required an average of 23.2 months before the first purchase. This group was followed closely by the 19-24 age group (22.3 months).

The quickest purchasers were the 16-18-year-old users, followed by the over-65 users.

WHY SO LONG TO MAKE THE FIRST PURCHASE?

Why do users wait to make their first online purchase? Concern about fraud and deception rank high among the reasons. The single most-cited reason for this lag is concern about giving out a credit card number, mentioned by 28.4 percent of Internet purchasers.

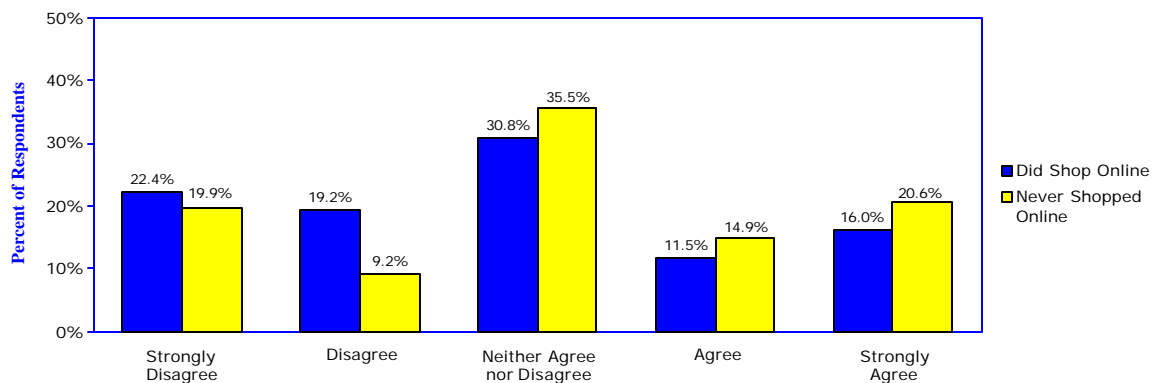


The second most-cited reason is “no products or services available;” and third is “concerned about deception.”

For other questions about using credit cards online, see page 53.

IS FACE-TO-FACE CONTACT IMPORTANT WHEN SHOPPING?

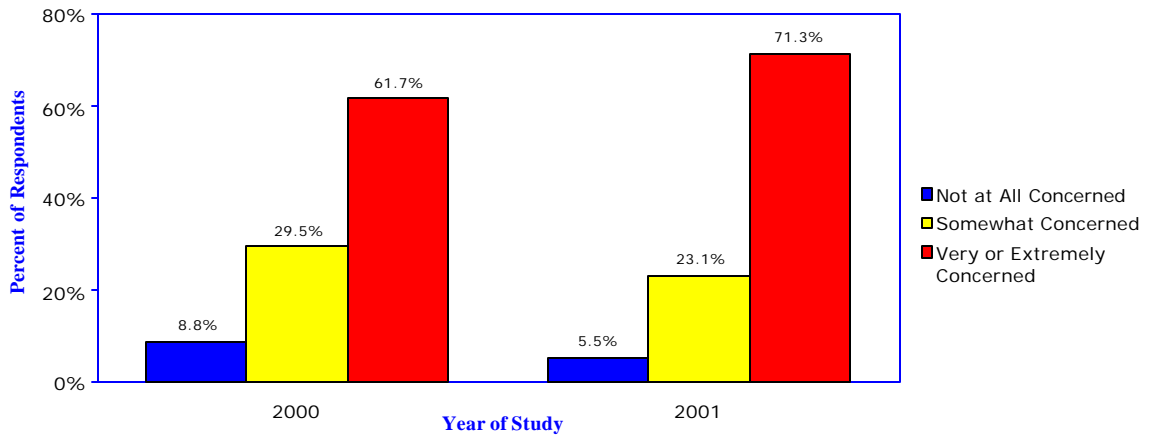
Buying a product from a “real person” remains an issue for some Internet users, whether they have shopped online or not.



When asked if they are uncomfortable with the lack of face-to-face contact when ordering on the Internet, 27.5 percent of online buyers and 35.5 percent of users who have never shopped online either agree or strongly agree.

BUYING ONLINE: ARE YOU CONCERNED ABOUT YOUR PRIVACY?

In the first of several questions in the 2001 UCLA Internet Project that explore personal privacy, nearly all respondents report some level of concern about the privacy of their personal information when or if they buy online.



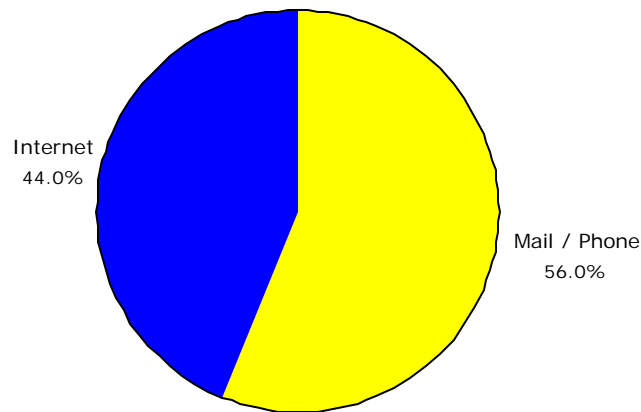
Nearly two-thirds (65.8 percent) of all respondents aged 16 and over say they are very or extremely concerned about their personal privacy when buying online, while only 5.5 percent say that they are not at all concerned.

For other questions about personal privacy, security of credit card information, and other privacy-related issues, see pages 53 and 65.

“REMOTE” SPENDING: ONLINE VS. MAIL OR PHONE ORDERS

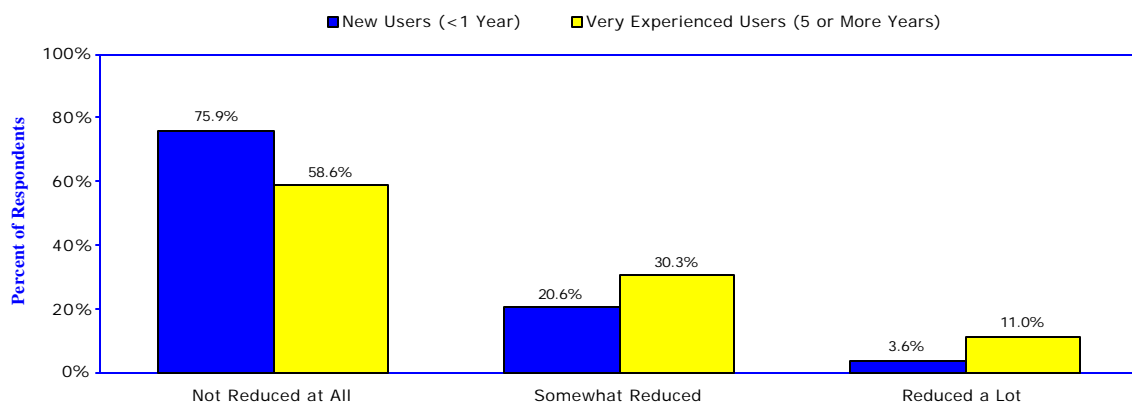
Buying “remotely” in all of its forms – by mail order, phone order, or online – is changing as the Internet evolves.

In 2001, mail and phone orders represent more than half of all remote purchasing.



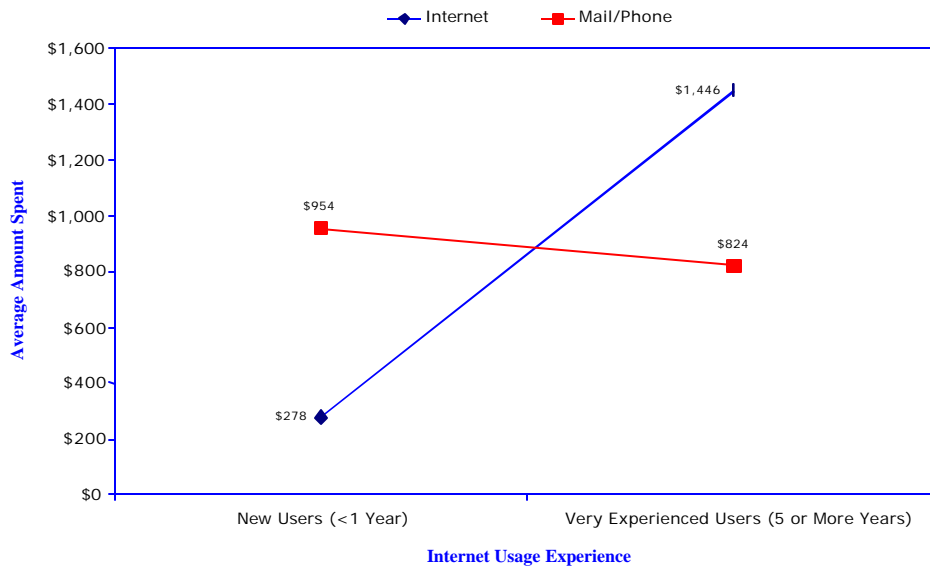
HOW DOES INTERNET BUYING AFFECT MAIL OR PHONE ORDERS?

The Internet affects users’ views about purchasing by mail or phone order, although more for very experienced users than for new users.



More than three-quarters of new users say their mail and phone orders have not been reduced by shopping on the Internet; 41.3 percent of very experienced users say their mail and phone orders have been reduced somewhat or a lot by buying online.

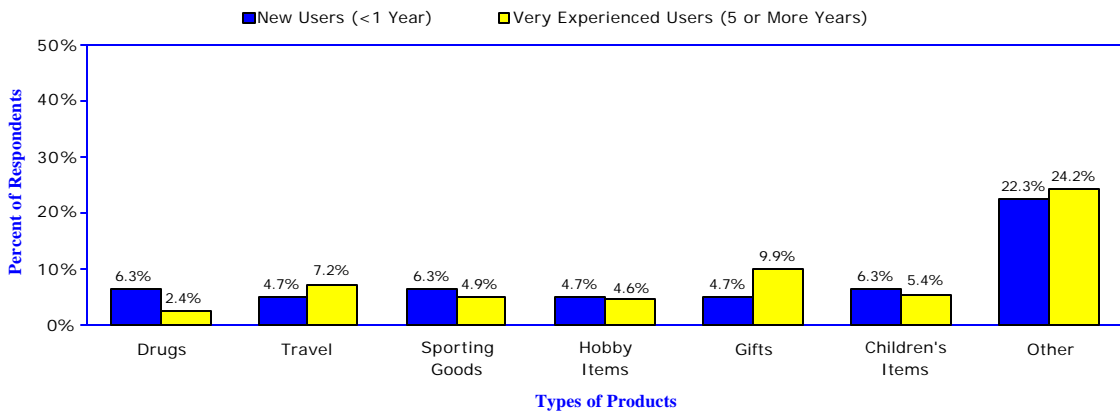
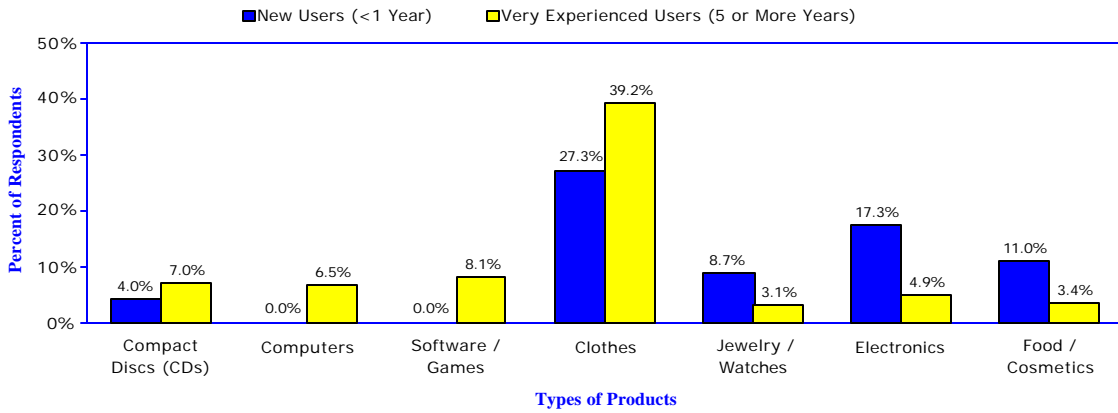
Very experienced users spend dramatically more than new users in their online shopping, but only a small portion of this increase comes from dollars spent on mail and phone orders (see the chart below).



The largest reduction in mail and phone orders by new users is for clothing, electronics, food and cosmetics, and jewelry. The largest changes in mail and phone orders among very experienced users are reduced purchases of clothing, gifts, software, travel arrangements, and compact discs.

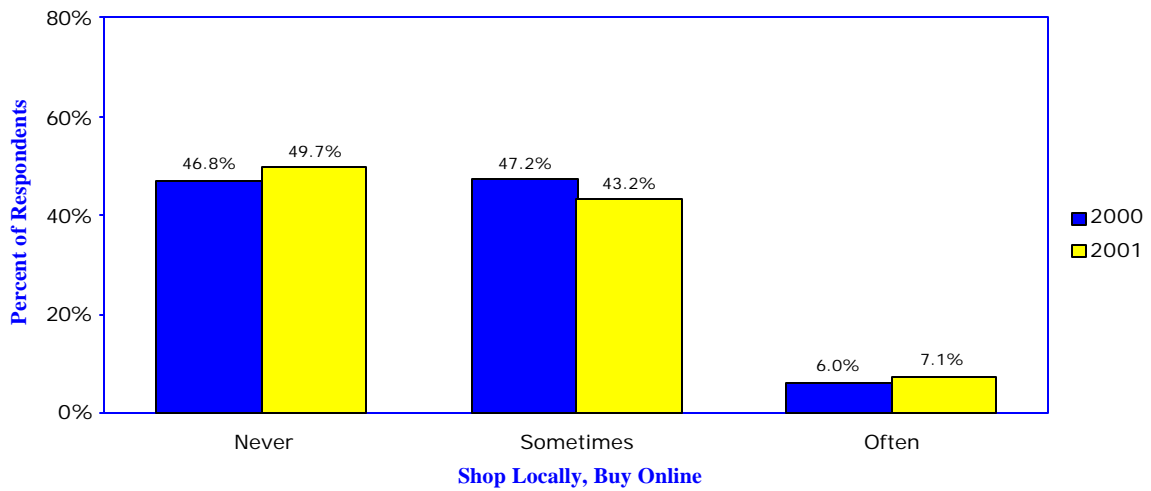
(For items now purchased less by mail and phone order, see the charts on the next page.)

(These charts show products now purchased less through mail and phone order by new Internet users and very experienced users.)



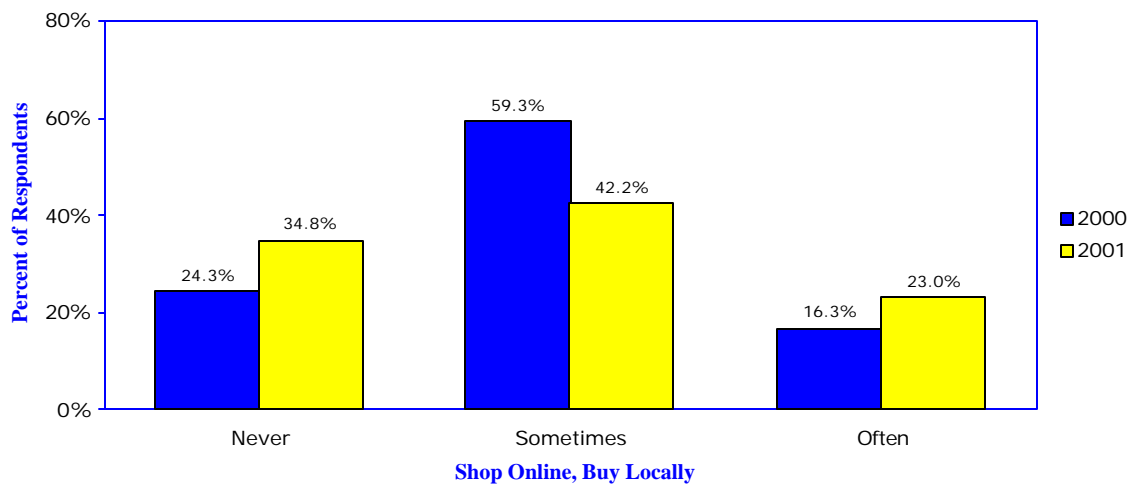
DO YOU SHOP IN STORES, BUT THEN BUY ONLINE?

The number of Internet purchasers who say they shop in local stores and later buy online has declined. In 2001, 50.3 percent of Internet purchasers say they shop in traditional retail locations and then buy online sometimes or often – down from 53.2 percent who reported the same behavior in 2000.



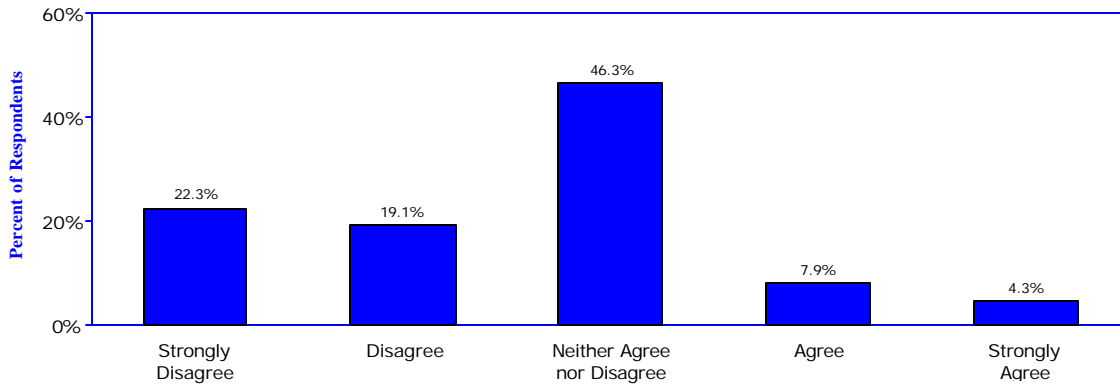
DO YOU SHOP ONLINE, BUT THEN BUY IN STORES?

The number of Internet users who browse online and later buy in stores has also declined. In 2001, 65.2 percent browse online and later buy in retail stores sometimes or often, down from 75.6 percent in 2000.



CUSTOMER SERVICE: IS IT BETTER ONLINE?

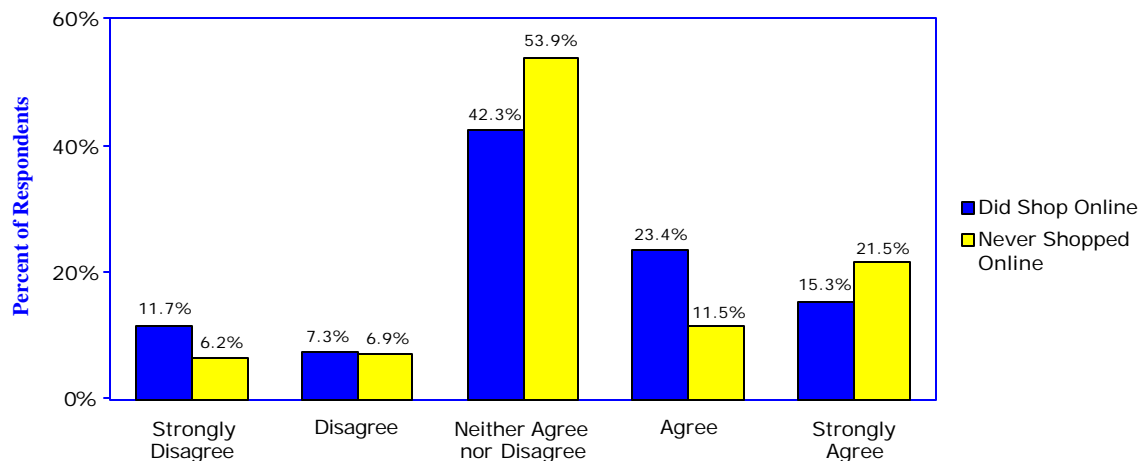
Customer service is not a strong selling point for shopping on the Internet.



Only 12.2 percent of users who buy online agree or strongly agree that the customer service offered on the Internet is better than customer service offered in retail stores, while 41.4 percent disagree or strongly disagree with that statement.

RETURNING ONLINE PURCHASES

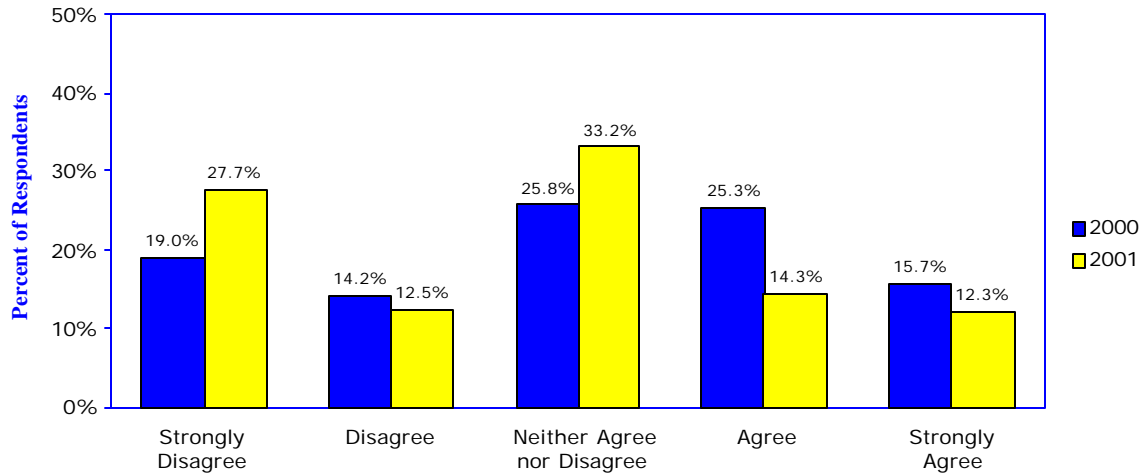
Views vary about the difficulty of returning or exchanging goods ordered on the Internet. Of users who have shopped online, 38.7 percent either agree or strongly agree that returning or exchanging goods ordered online is difficult; 33 percent of users who have not shopped online agree or strongly agree.



Of Internet shoppers, 19 percent either disagree or strongly disagree that returning or exchanging goods ordered on the Internet is difficult, while 13.1 percent of users who have not shopped online disagree or strongly disagree.

ONLINE BUYING: ARE BRAND NAMES IMPORTANT?

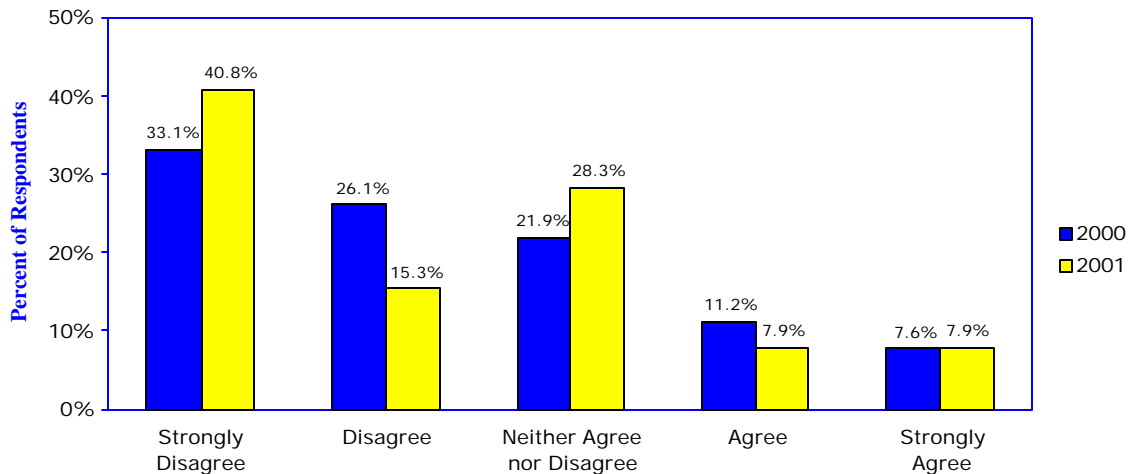
Internet purchasers had less interest in 2001 than in 2000 in buying brand names online as opposed to when shopping in a traditional retail store.



In 2001, 26.6 percent agree or strongly agree that they are more likely to buy brand name products when shopping on the Internet than when shopping in a store, down from 41 percent in 2000. (This substantial change may be due to an increased comfort level in buying online.)

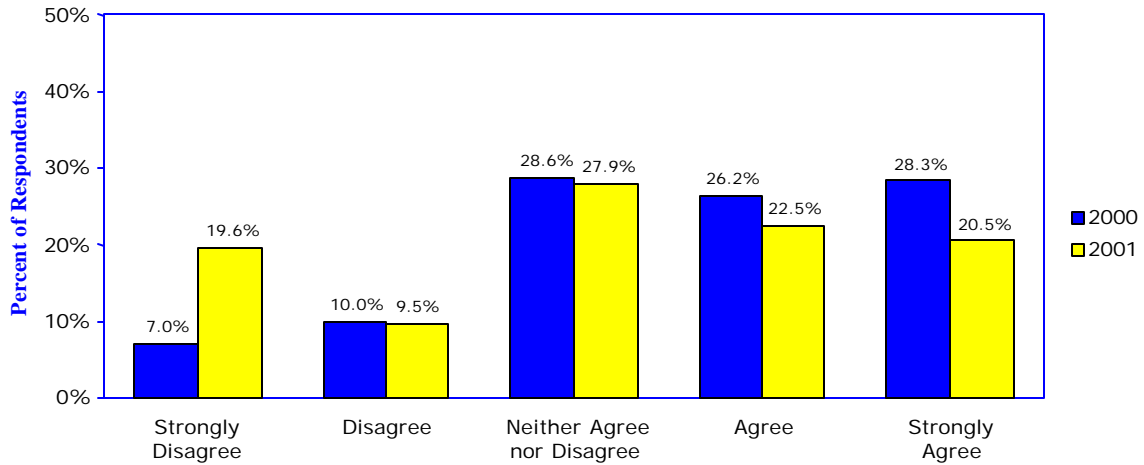
DO USERS SPEND MORE THAN THEY INTEND?

Both the 2001 and 2000 studies confirm that Internet users do not overspend when shopping online. In 2001, only 15.8 percent of Internet purchasers agree or strongly agree that they spend more online than they intended, down from 18.8 percent in 2000.



WILL USERS INCREASE THEIR ONLINE PURCHASING?

Even though online purchasing in general continues to hold steady, and Internet purchasers report shifts away from traditional retail buying, a lower number of Internet purchasers in 2001 than in 2000 say they will increase their online purchasing.



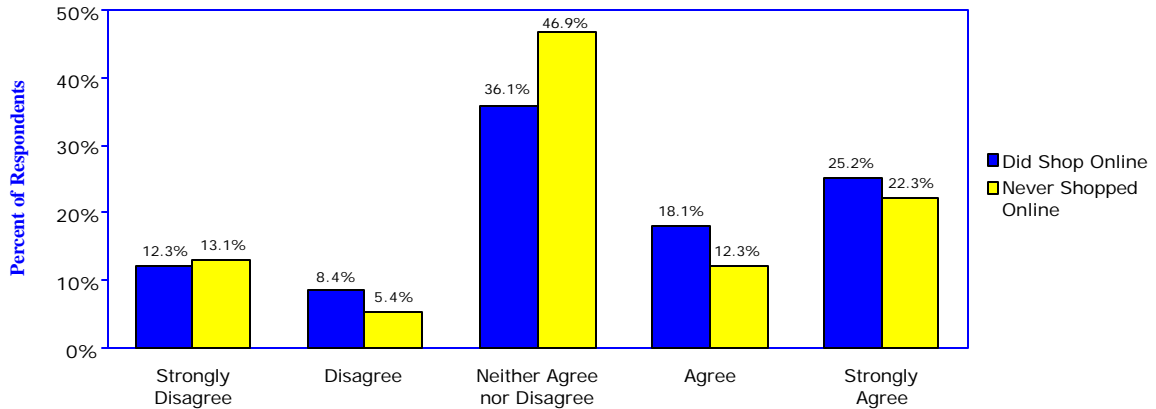
Forty-three percent of purchasers either agree or strongly agree that they will eventually make many more purchases online, down from 54.5 percent in 2000.

Internet purchasers in 2001 who disagree or strongly disagree with this statement rose to 29.1 percent, up from 17 percent in 2000.

Do these responses represent a maturing of Internet purchasing, with users becoming comfortable with their level of online buying? Or, could these responses indicate the beginning of a downward trend for online buying? This issue will be a subject of continuing study in upcoming surveys.

SALES TAX: WOULD IT AFFECT ONLINE PURCHASING?

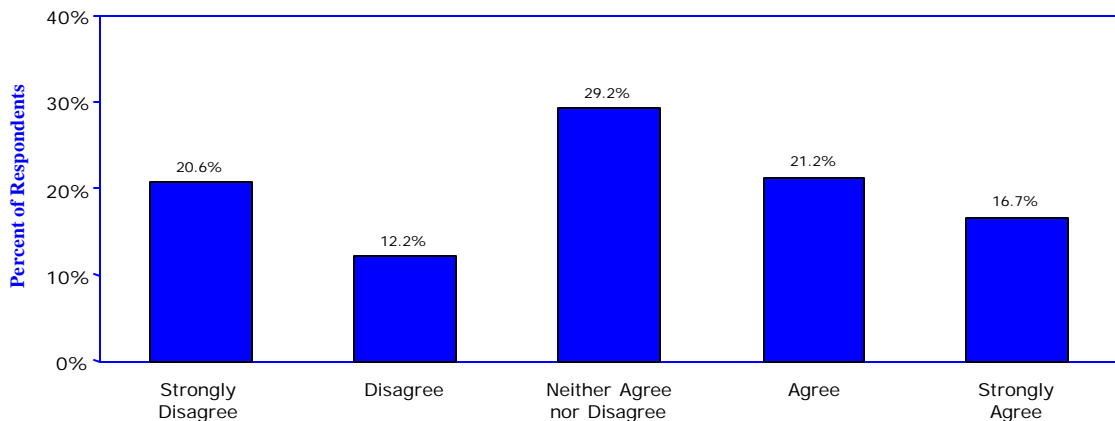
In response to the statement, “If sales tax was charged for online purchases, I would probably buy less on the Internet,” 43.3 percent of current Internet purchasers either agree or strongly agree, while 34.6 percent of Internet users who have not yet purchased agree or strongly agree.



Perhaps more important, only 20.7 percent of current online purchasers disagree or strongly disagree, while 18.5 percent of Internet users who have not yet purchased online disagree or strongly disagree.

FREE ONLINE SERVICES: WILL INTERNET USERS PAY FOR THEM?

This question, new for the 2001 survey, was added to explore views about the increasing number of free online services that are converting to pay services.

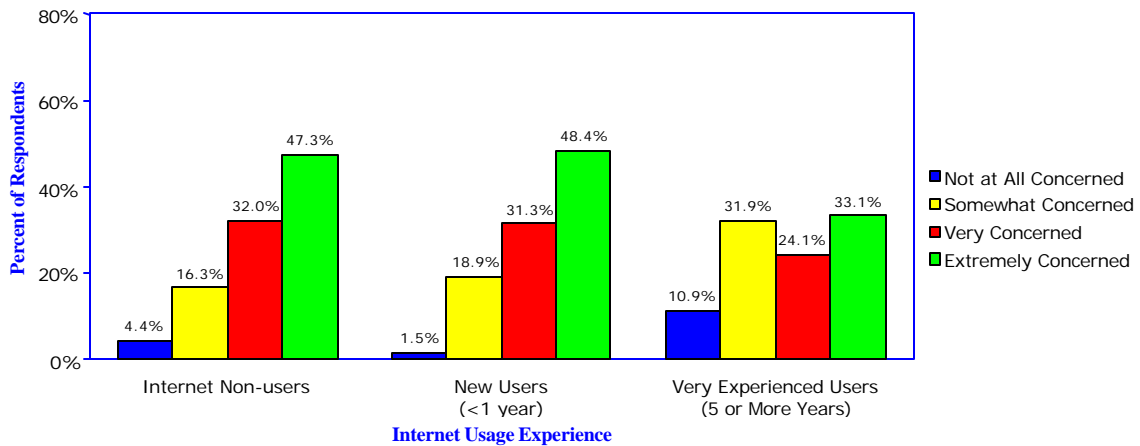


When Internet users are asked if they would be willing to pay a reasonable price for a free online service if it became a pay service, 37.9 percent agree or strongly agree, while 32.8 disagree or strongly disagree. Nearly 30 percent (29.2 percent) neither agree or nor disagree.

CONCERNS ABOUT CREDIT CARD INFORMATION: A MAJOR PROBLEM

The UCLA Internet Project in both 2000 and 2001 found deeply held concerns about privacy among new users and very experienced users alike, and prominent among the privacy issues was concern about credit card security.

When asked about the security of credit card information when making online purchases, nearly all users (98.6 percent) in 2001 with less than one year of Internet experience express concern about credit card information when buying online.

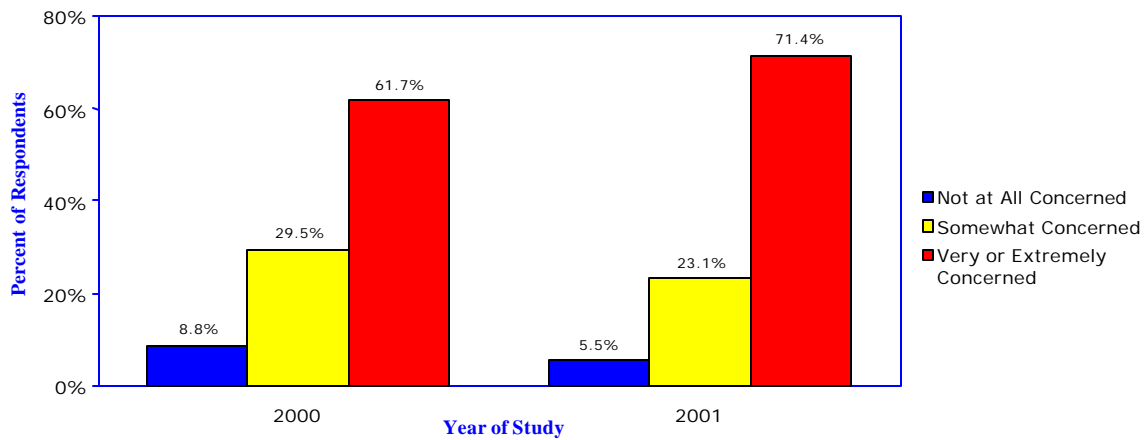


Among these new users, 79.7 percent are “very concerned” or “extremely concerned” about credit card security.

Although concerns decline somewhat among users with five or more years of online experience, the numbers are nevertheless significant; 89.1 percent of users with five or more years of experience online express some concern about credit card information when buying online. Of very experienced users, 57.2 percent remain “very concerned” or “extremely concerned.”

Only 10.9 percent of very experienced users are “not at all concerned” about credit card information when purchasing online.

Comparing the 2001 and 2000 surveys (see the chart below), the number of total respondents with concerns have actually increased slightly – to 94.4 percent in 2001, up from 91.2 percent in 2000 – and the number of respondents who say they are either “very concerned” or “extremely concerned” jumped almost 10 percent.



Concern about credit card information in online transactions is a significant problem for Internet marketers – even more important, these concerns remain high for even the very experienced users.

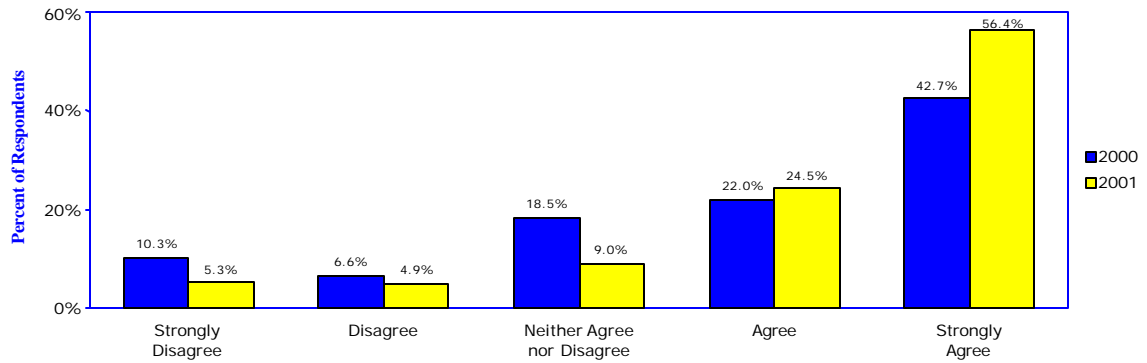
For more questions about privacy, see pages 65.

COMMUNICATION PATTERNS

Communication with other users is emerging as one of the fastest growing benefits of the Internet. The 2000 UCLA Internet Report revealed many important issues about online communication; the 2001 report revisits several of these subjects.

E-MAIL: DOES IT HELP YOU REACH OUT TO OTHERS?

Growing numbers of users say that e-mail helps them communicate with people they could not normally connect with otherwise.

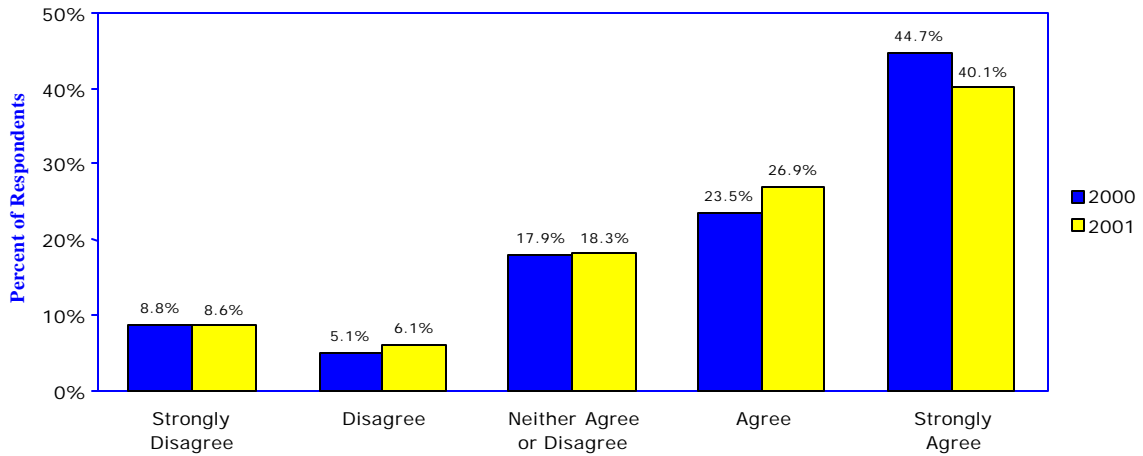


More than 80 percent of e-mail users in 2001 (80.9 percent) agree or strongly agree that e-mail allows them to communicate with people they could not normally talk to as often – up from 64.7 percent who responded the same way in 2000.

For more questions about how the Internet serves as a catalyst to create and maintain friendships, see page 71 and 72.

E-MAIL: USERS STAY IN TOUCH

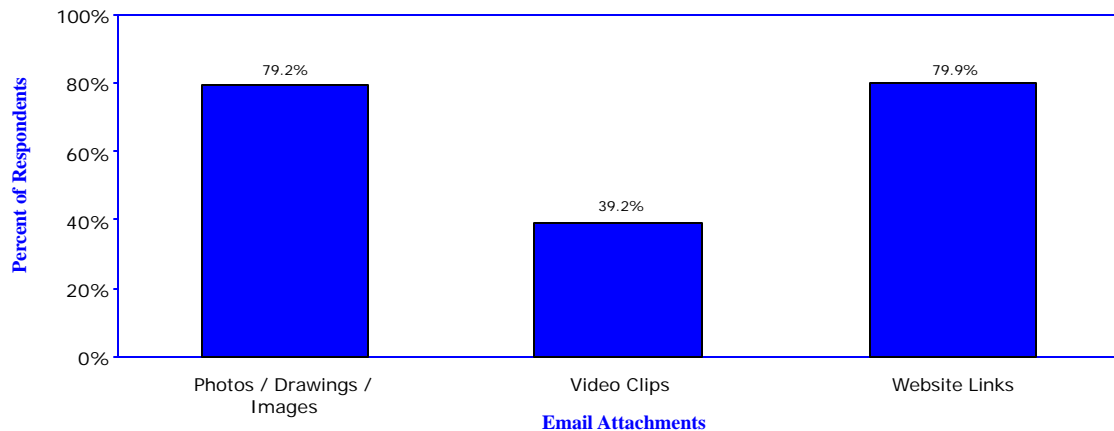
Are e-mail users more likely to keep in contact with other users? E-mail users in 2000 said yes, and that view remains strong in 2001.



More than two-thirds of e-mail users in 2001 (67 percent) either agree or strongly agree that they are more likely to keep in contact with someone who has e-mail, down marginally from 68.2 percent in 2000. Only 14.7 percent of e-mail users disagree or strongly disagree with that statement, up slightly from 13.9 percent in 2000.

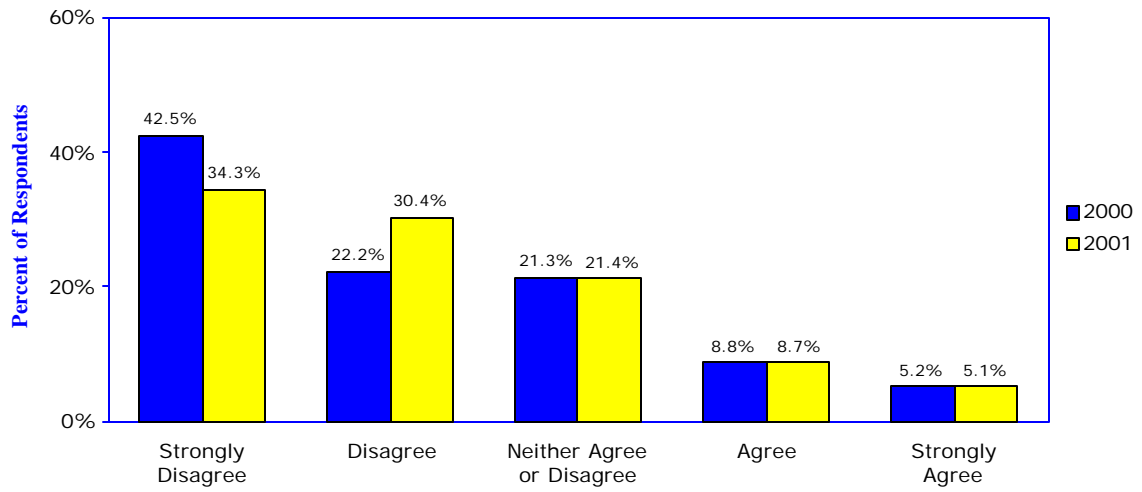
USERS AND E-MAIL ATTACHMENTS

Most e-mail users include a variety of attachments and other material in the messages they send. Nearly 80 percent send images or links to Web sites, while almost 40 percent include video clips.



DOES E-MAIL TAKE TOO MUCH TIME?

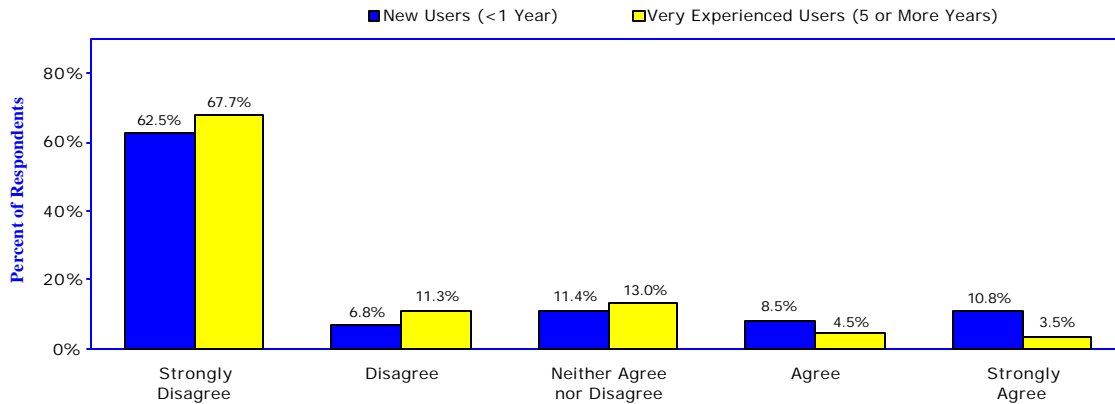
Although complaints about bulging e-mail inboxes may seem a common office problem (see page 85), large majorities of users in 2000 and 2001 do not think that e-mail requires too much time.



Of Internet users with e-mail in 2001, 13.8 percent agree or strongly agree that e-mail takes up too much time, while 64.7 percent disagree or strongly disagree.

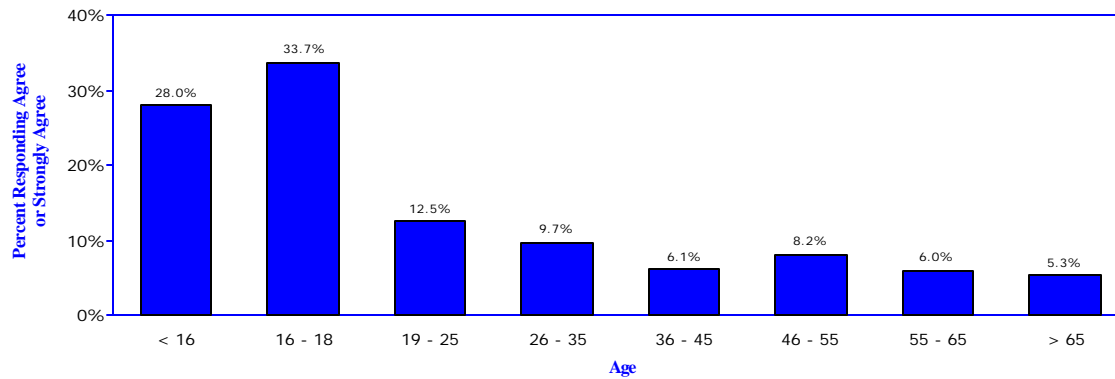
MEETING PEOPLE: IS IT EASIER ONLINE?

Internet users consider e-mail a powerful tool to stay in touch with people they know, but they do not believe it is easier to meet new people online than in person.



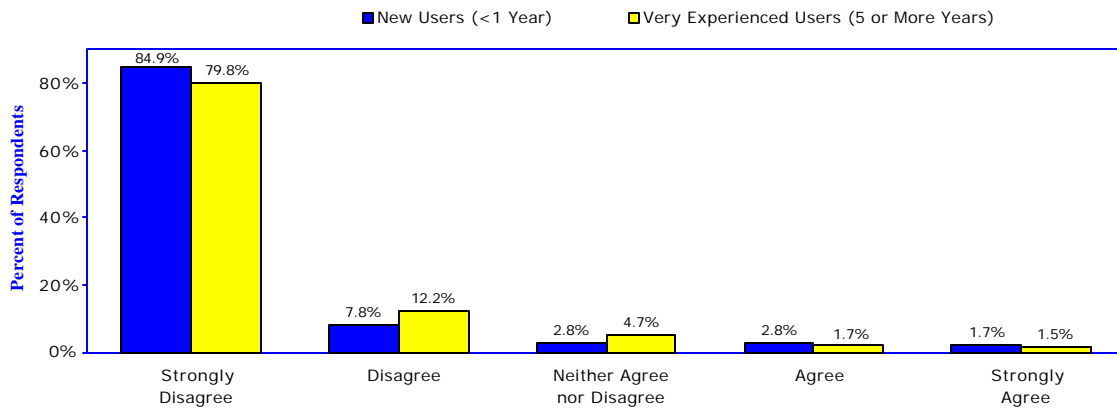
Substantial majorities of new Internet users (69.3 percent) and very experienced users (79 percent) either disagree or strongly disagree that it is easier for them to meet people online than in person.

Users under age 18 are much more likely to agree with this statement (see the chart below).

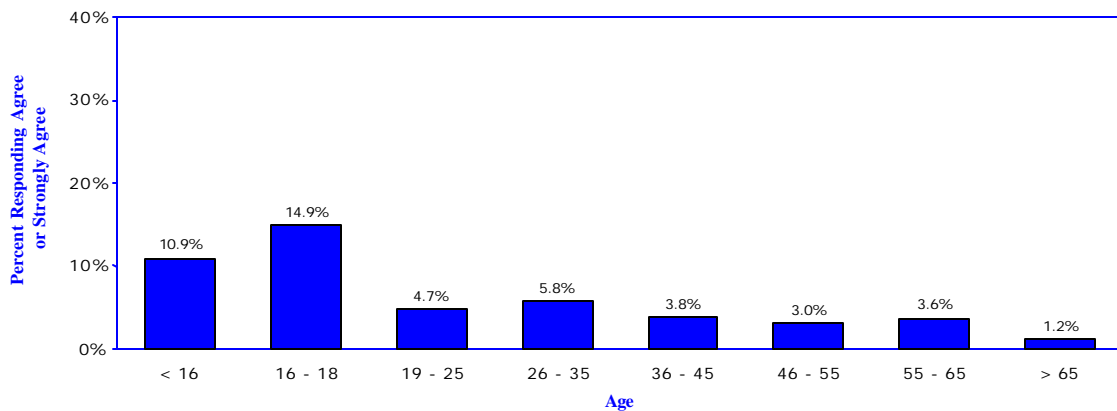


DO YOU REVEAL PERSONAL DETAILS WHILE ONLINE?

Users are unlikely to reveal personal details about themselves online. When asked if they share intimate details of their lives that they would generally not reveal in person, 92.7 percent of the new users and 92 percent of very experienced users either disagree or strongly disagree with this statement.

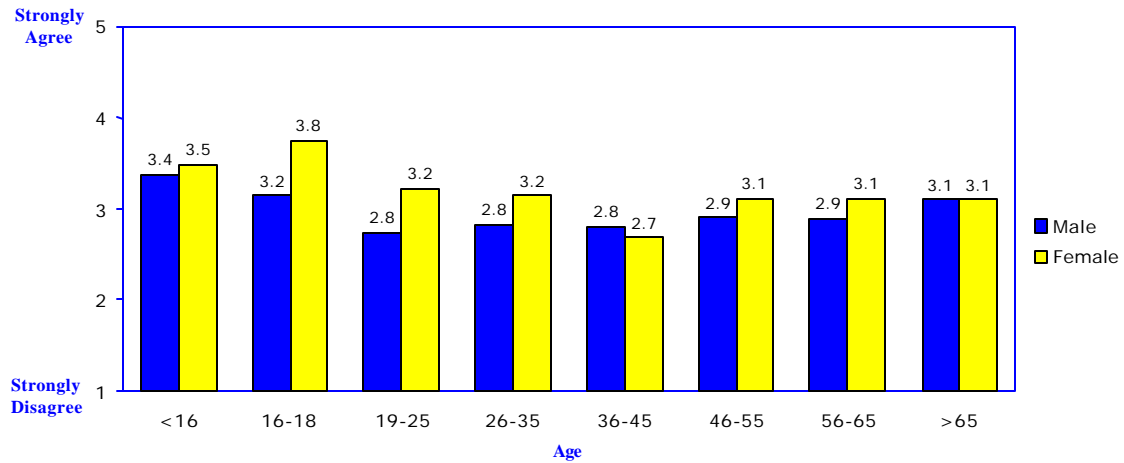


By far the largest agreement to this statement comes from teenagers (see the chart below).



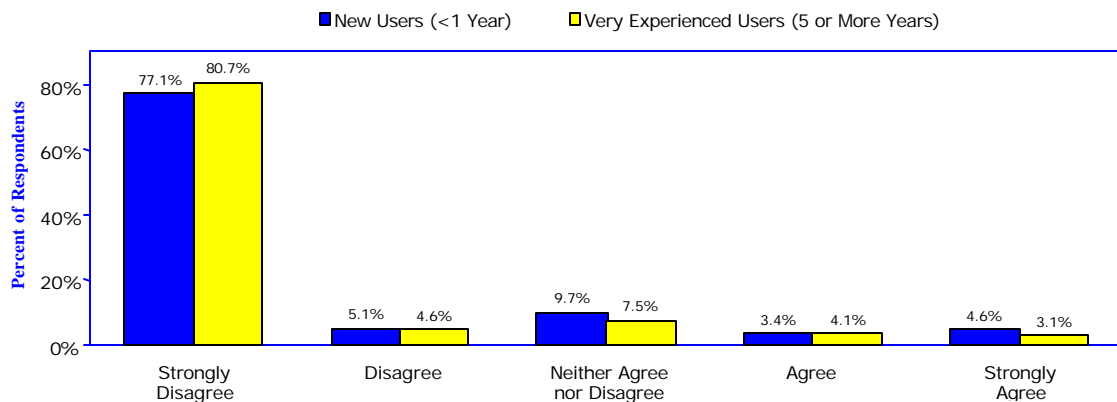
DO YOU USE MULTIPLE SCREEN NAMES WITH DIFFERENT PERSONALITIES?

A new question for 2001 raises the issue of role playing online when communicating with others. A small number of users across the spectrum of age ranges expresses some agreement that they have multiple screen names, and each name has its own personality.



The highest level of agreement with this statement is among girls ages 16-18. Women in all age ranges except 36-45 report higher levels of agreement with this statement than do men.

The vast majority of users disagree or strongly disagree with this statement. Yet a small percentage of both new users (8 percent) and very experienced users (7.2 percent) either agree or strongly agree that they have multiple screen names, each with its own personality.



SOCIAL AND PSYCHOLOGICAL EFFECTS

As the Internet becomes increasingly pervasive and accepted, online technology increasingly shapes household life and personal interaction. The 2001 UCLA Internet Project explores a wide range of social and personal issues that relate to going online, including beliefs about the Internet, the effects of the Internet on children, the impact of the Internet on family and friends, and the role of the Internet at work.

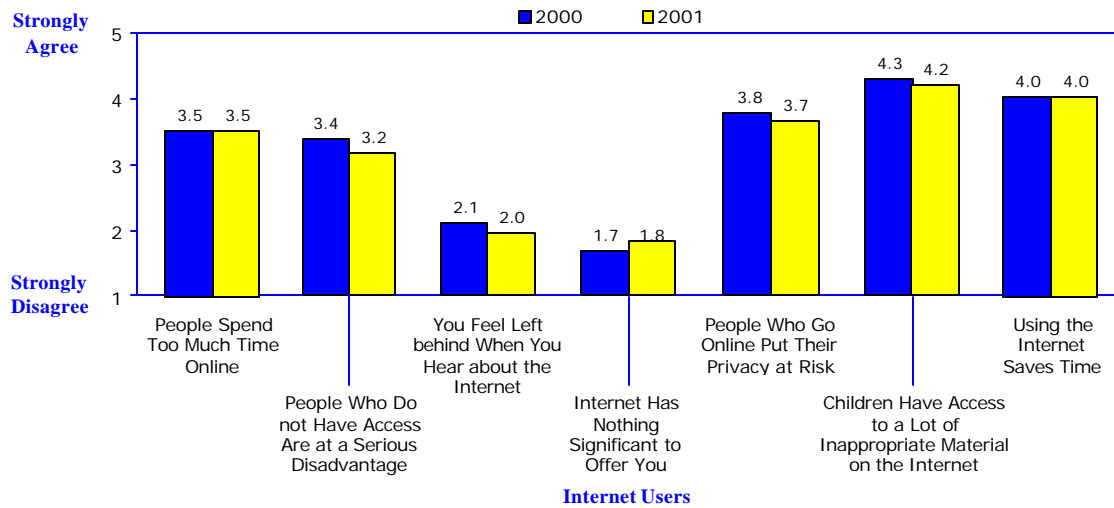
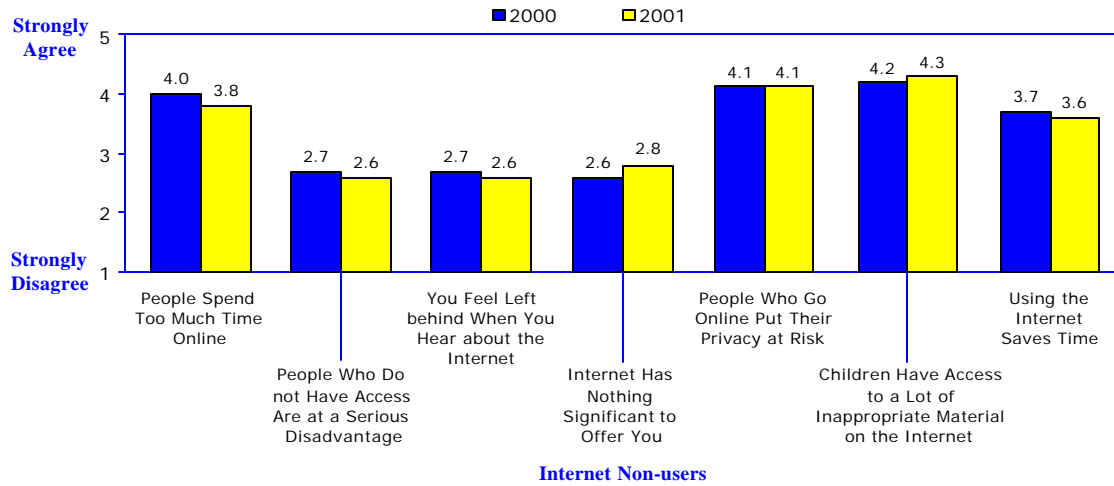
VIEWS ABOUT THE INTERNET

BELIEFS ABOUT THE INTERNET

The 2001 UCLA Internet Project asked a series of questions that explore personal views and attitudes about the Internet. (Views of Internet non-users are shown on the first chart on the next page; users on the second chart.)

Among the most noteworthy findings from questions about views about the Internet:

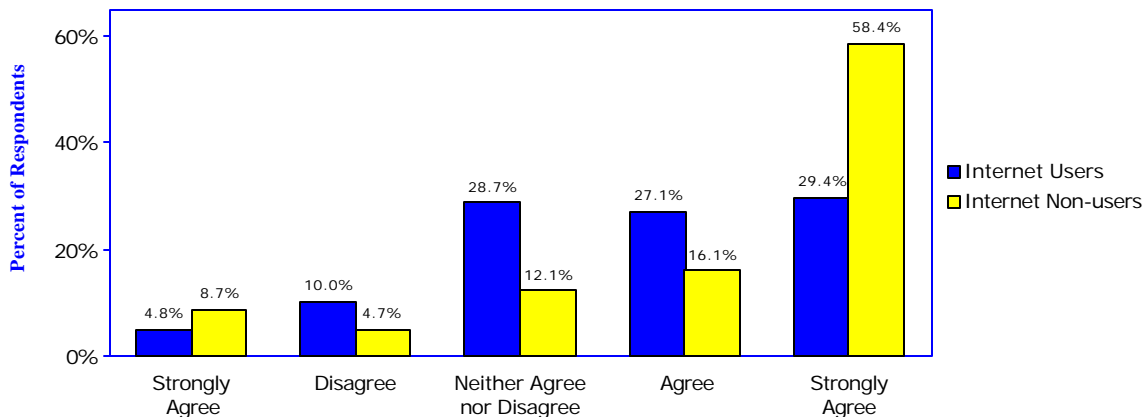
- As in 2000, users and non-users in 2001 agree at nearly identical levels that children can gain access to “a lot of inappropriate material” on the Internet – the highest level of agreement in this series of questions.
- Non-users and users (to a lesser degree) agree that “people who go online put their privacy at risk.” (For other questions about privacy, see pages 53, 65, and 66.)
- More users than non-users say that using the Internet saves time. More non-users than users believe that people spend too much time on the Internet.
- Both users and non-users disagree that “the Internet has nothing significant to offer you.” Internet users in 2001, as in 2000, especially disagree with this statement.



PRIVACY

IS YOUR PRIVACY AT RISK WHEN YOU GO ONLINE?

As in 2000, the issue of privacy in many forms continues to raise the greatest concern about the Internet among both users and non-users in 2001. Respondents express considerable concern that using the Internet creates risks to individual privacy.



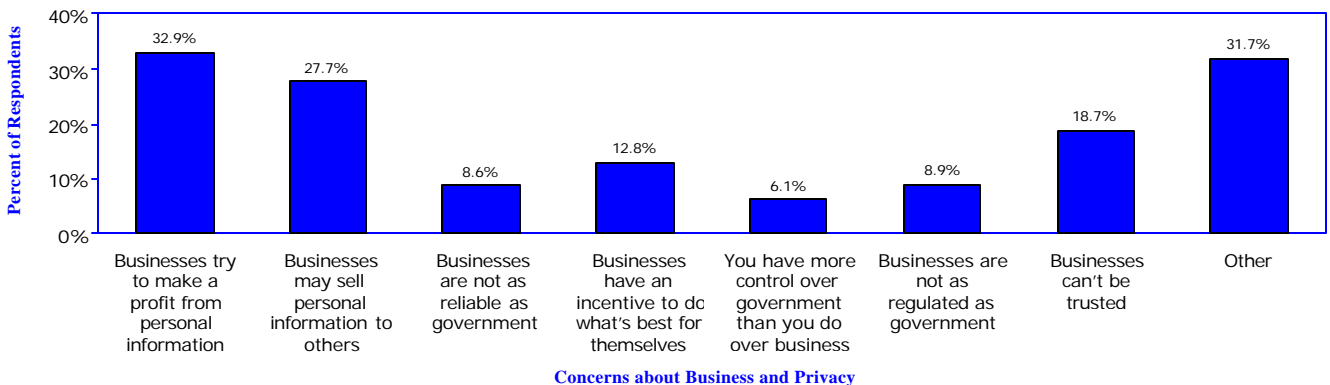
- When asked if “people who go online put their privacy at risk,” more than half of Internet users (56.5 percent) and nearly three-quarters (74.5 percent) of non-users in 2001 either agree or strongly agree. Slightly more agreed or strongly agreed in 2000 (63.6 percent of users, 76.1 percent of non-users).
- Nearly all respondents (94.5 percent) report some level of concern about the privacy of their personal information when or if they buy online. (See page 53)
- The issue of privacy continues to raise barriers to online sales – especially among infrequent purchasers. As stated on page 53, nearly all users with less than one year of experience (98.6 percent) express some concern about credit card information when they buy online.
- Although concerns decline somewhat among users with five or more years of online experience, the numbers are nevertheless significant. Of very experienced users, 89.1 percent express some concern about credit card information when buying online. Of these very experienced users, 57.2 percent remain “very concerned” or “extremely concerned.”
- Ten percent of non-users who were once users cite “privacy concerns” as a reason why they stopped using the Internet entirely.

MAINTAINING PRIVACY FROM PRIVATE BUSINESS AND GOVERNMENT

In the last half of the twentieth century, perceptions that public authorities increasingly intruded into personal lives established the government as the traditional enemy of privacy. As information gathering for electronic marketing and financial records has proliferated in the corporate world, private business has joined the government as a potential threat to personal privacy.

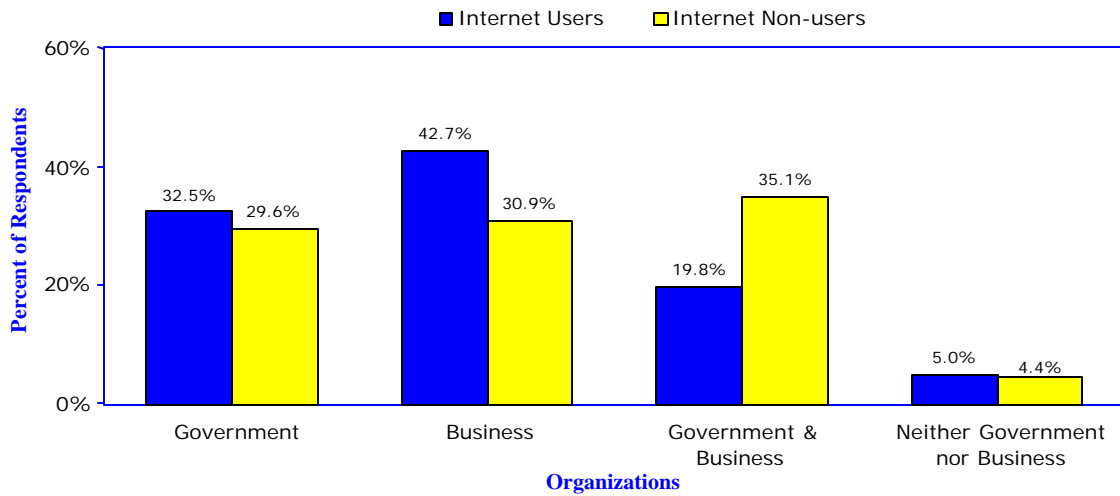
A new question for the 2001 UCLA Internet Project asked respondents about maintaining the privacy of personal information from government and business, and respondents – users and non-users alike – express extremely high levels of concern. When asked about maintaining the privacy of personal information from organizations, more than 90 percent of respondents are “somewhat concerned” or “highly concerned” about both business and government. A slightly larger number is more concerned about business (93.2 percent for business, and 90.4 percent for government).

When respondents are asked why they are concerned about their privacy with business organizations (see the chart below), 32.9 percent say “businesses try to make a profit from personal information” and 27.7 percent say “businesses may sell personal information to others” – possibly reacting to highly publicized cases of companies that sell information to direct marketing firms and other organizations without asking permission of the customer (a problem that has been handled only in part through recent legislation).



PRIVACY: WHO SHOULD BE RESPONSIBLE?

Opinions vary among users and non-users about who should be responsible for guaranteeing personal privacy on the Internet. Large numbers of users and non-users believe either business, or government, or a combination of the two should be responsible for ensuring online privacy.

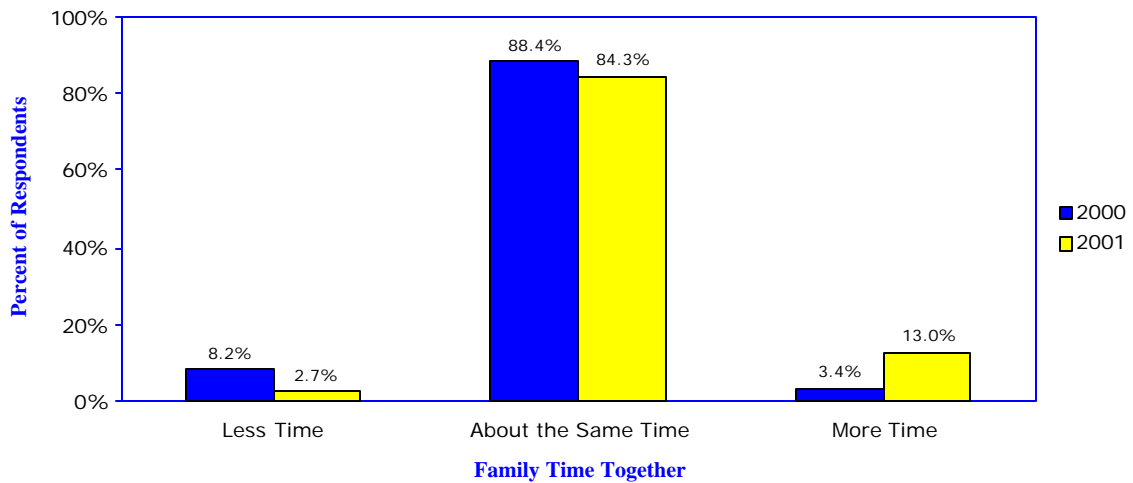


THE INTERNET, FAMILY, AND FRIENDS

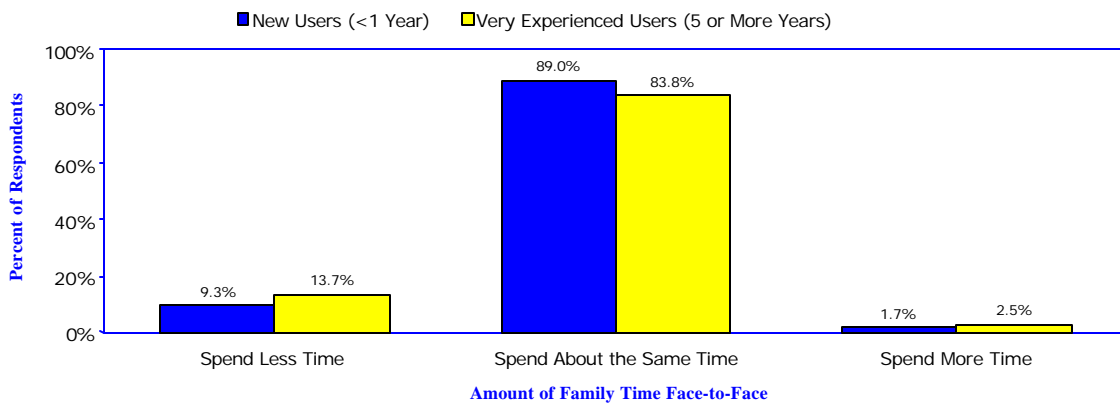
HOUSEHOLD TIME TOGETHER

Internet users overall believe that the Internet either has no influence on the amount of time they spend together with household members, or positively influences household time together.

In 2001, 97.3 percent of users say the members of their household, since being connected to the Internet, spend about the same amount of time together or more time together – up from 91.8 percent in 2000. All of this increase comes from users who say that the household now spends more time together.

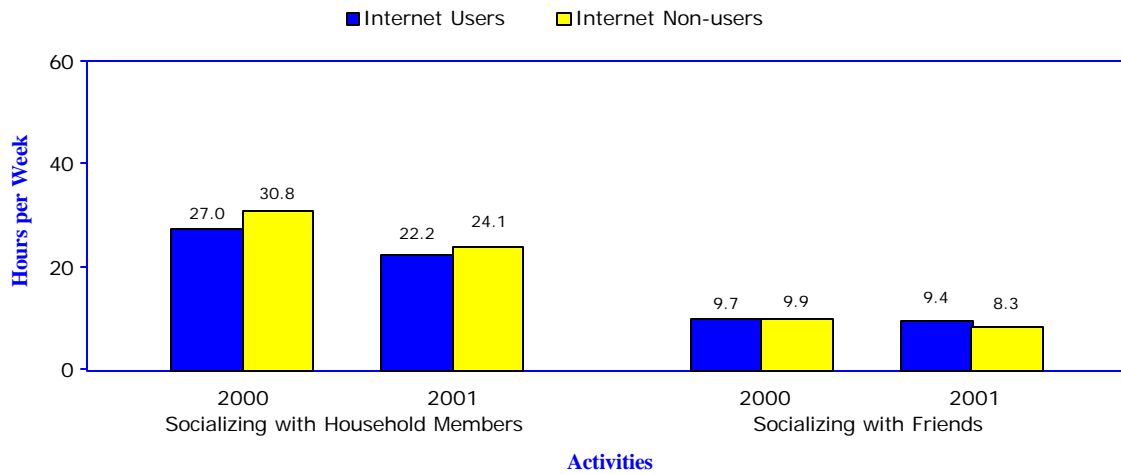


However, experience online does affect household time together (see the chart below). More of the very experienced users than new users say they spend less time together with members of their household.



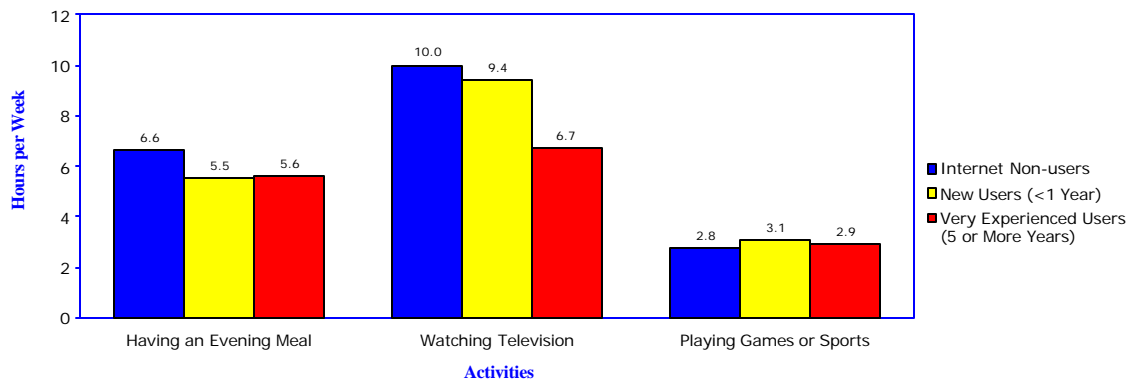
SOCIALIZING WITH FAMILY AND FRIENDS

Internet observers who consider online activity to be anti-social can note that Internet users in 2001 spend slightly more time than non-users socializing with friends, and almost as much time with family.



DOES ONLINE EXPERIENCE AFFECT FAMILY ACTIVITIES?

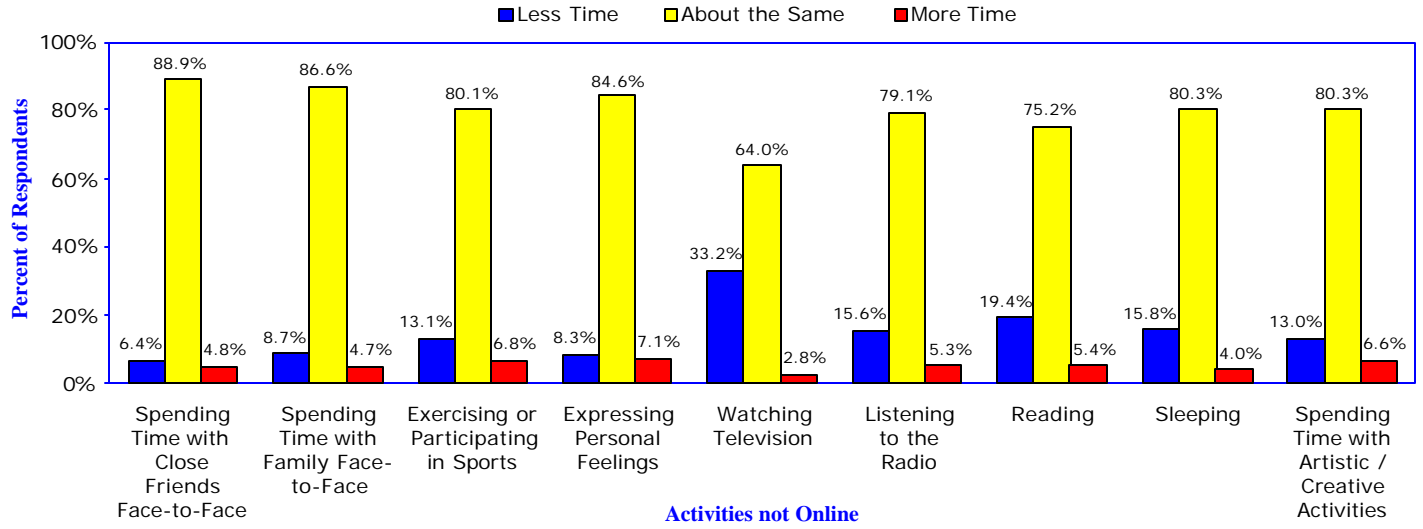
New Internet users, very experienced users, and non-users report similar amounts of time involved in a selection of activities with other members of their household – except when very experienced users report on group television viewing.



All three groups report about the same amount of time spent having an evening meal, playing games, or playing sports with other members of the household. However, non-users report the highest level of group television viewing, which declines for new users, and drops substantially for users with five or more years of Internet experience.

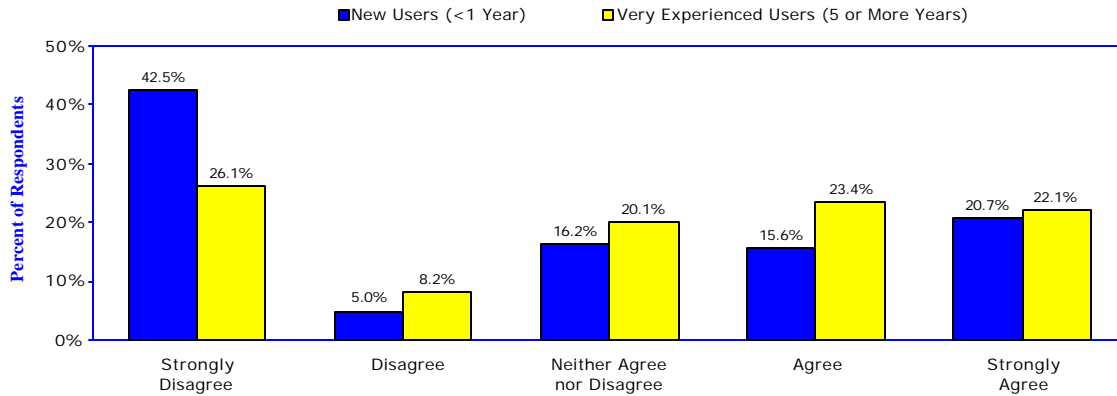
IS THE INTERNET CHANGING WHAT USERS DO AT HOME?

Most users report that they spend about the same amount of time on non-computing activities at home as they did before they had the Internet. Television viewing, however, showed a large decline.



ARE INTERNET USERS COMMUNICATING MORE WITH FAMILY AND FRIENDS?

The Internet in 2001 continues to be a catalyst for creating and maintaining friendships and family relationships – but views about its usefulness for this purpose vary widely.

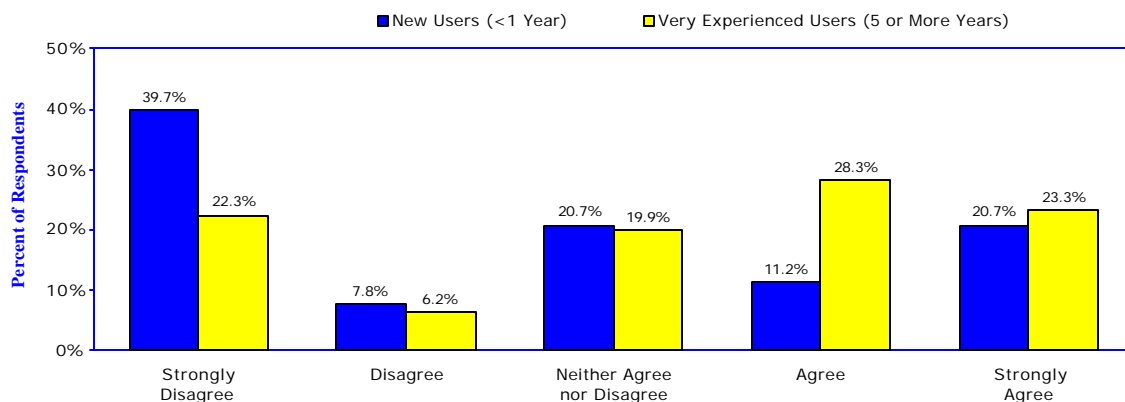


Almost half of new users (47.5 percent) and more than one-third of very experienced users (34.3 percent) disagree or strongly disagree that since using the Internet, they communicate more with family and friends. Yet 36.3 percent of new users and 45.5 percent of very experienced users agree or strongly agree.

For more questions about the role of e-mail in building relationships, see page 56, 57, and 59.

DOES THE INTERNET INCREASE THE NUMBER OF PERSONAL CONTACTS?

More of the very experienced users say they use the Internet to stay in contact with others.



Of new users, 47.5 percent disagree or strongly disagree that the Internet increases the number of people with whom they stay in contact, while 31.9 percent agree or strongly agree. Among very experienced users, much lower numbers disagree or strongly disagree (28.5 percent), while more than half (51.6 percent) agree or strongly agree.

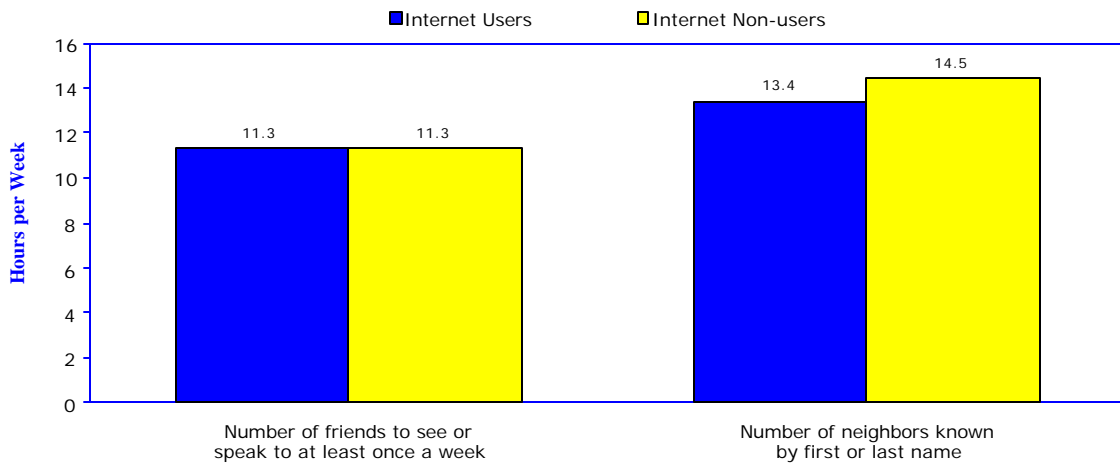
ONLINE FRIENDS: DO YOU MEET THEM IN PERSON?

As in 2000, the Internet continues to serve as a catalyst for creating new friendships:

- In 2001, 18.8 percent of Internet users say they have met someone in person whom they originally met online.
- These users report six new friends met in person, up slightly from 2000.
- This year's project found that 31 percent of Internet users say they have online friends whom they have never met in person.
- These users report an average of 20.7 online friends whom they have not met in person.

VIEWS ABOUT FRIENDS

Internet users and non-users report that they see or speak to the same number of friends at least once each week. Non-users report slightly higher numbers of neighbors whom they know by first or last name. (The fact that non-users know more neighbors by name can probably be attributed to age: on average, non-users are older than users, and older people have been shown to know neighbors by name.)



LIFE SATISFACTION

Compared to non-users, Internet users report slightly lower levels of interaction anxiety, powerlessness, loneliness, alienation, and lack of guiding social norms. Internet users express slightly higher levels of life satisfaction. Internet users are also slightly less likely to fear technology and more likely to be supportive of freedom of speech. These findings mirror those of 2000.

Note to researchers: We do not offer a detailed picture here of these findings, but we will soon release a detailed research paper on this topic.

INTERNET USE AND FAMILY LIFE

Respondents were asked about their satisfaction with several aspects of their family life:

- Users and non-users of the Internet are equally satisfied with the help they receive from their families when something is troubling them.
- Users are slightly more satisfied than non-users with how their families discuss items of common interest and share problem-solving with them.
- Internet users are slightly more satisfied than non-users with how their families accept their wishes to take on new activities or make changes in their lifestyles.
- Internet users are slightly more satisfied than non-users with how their family members express affection and respond to their feelings such as anger, sorrow, and love.
- Internet non-users are slightly more satisfied than users with the amount of time they and their family members spend together.

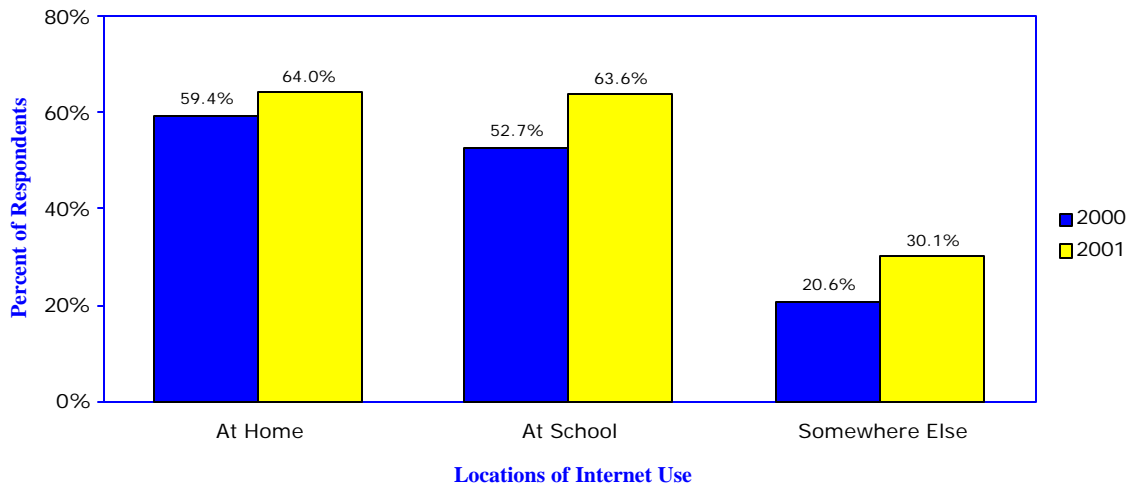
CHILDREN AND THE INTERNET

Do children spend too much time online? Does use of the Internet negatively affect grades? Do children become isolated because they remain online too long?

The answers to these questions in both 2000 and 2001, say adults in households with children, remain primarily “no.”

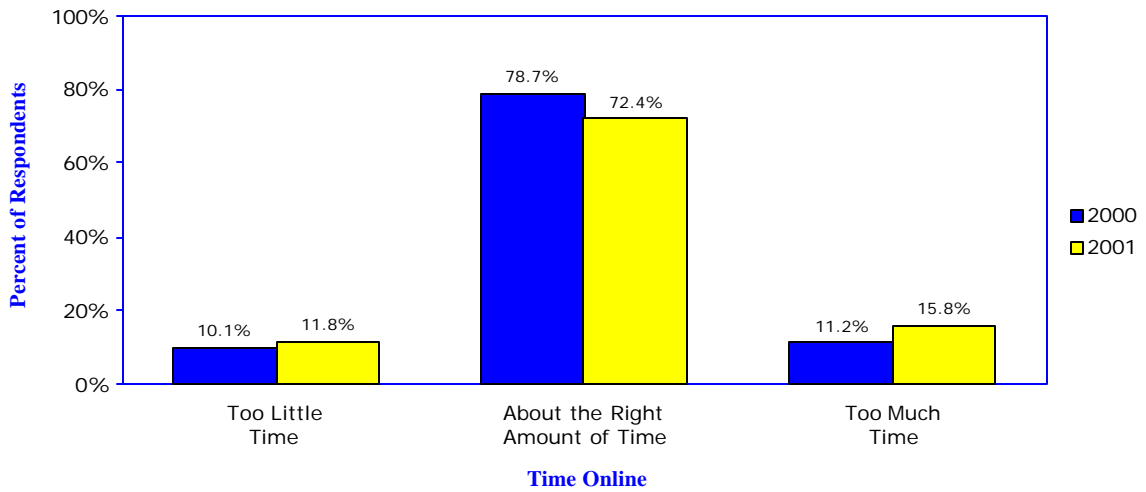
WHERE DO CHILDREN USE THE INTERNET?

Nearly two-thirds of children (64 percent) who go online have access to the Internet at home.

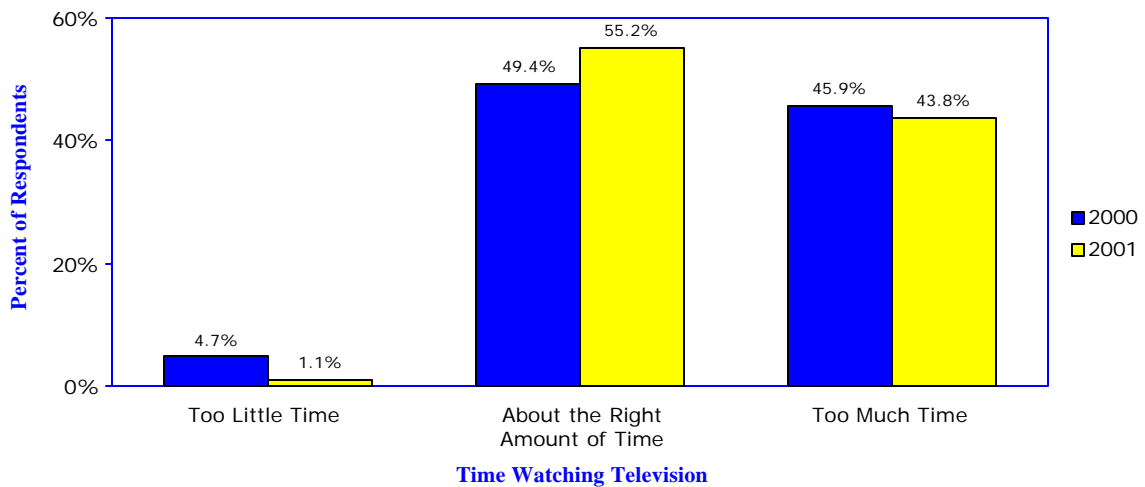


CHILDREN ONLINE AND TELEVISION: THE RIGHT AMOUNT OF TIME?

When asked about the time children spend using the Internet, 88.2 percent of adults say children in their households spend “about the right amount of time” or “too little time” online – down from 89.9 percent in 2000.

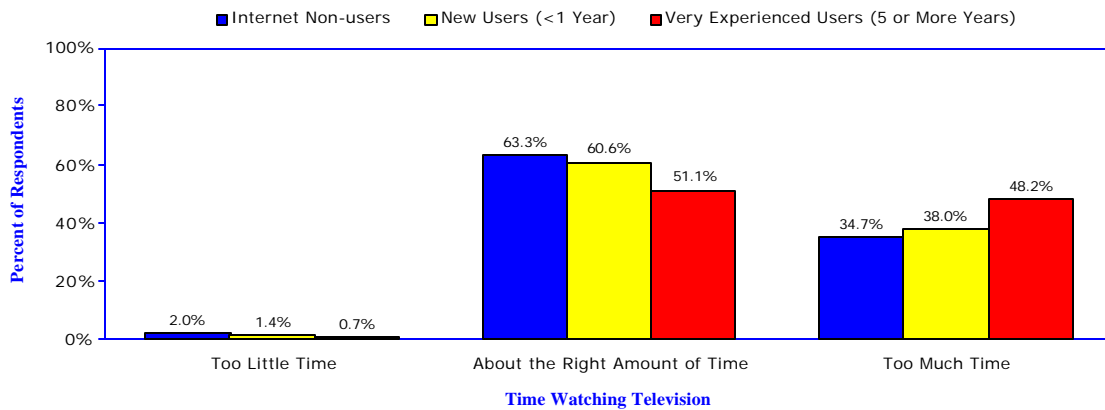


Regarding children and television viewing, 56.3 percent of adults in 2001 say children spend about the right amount of time or too little time watching television – up from 54.1 percent in 2000.



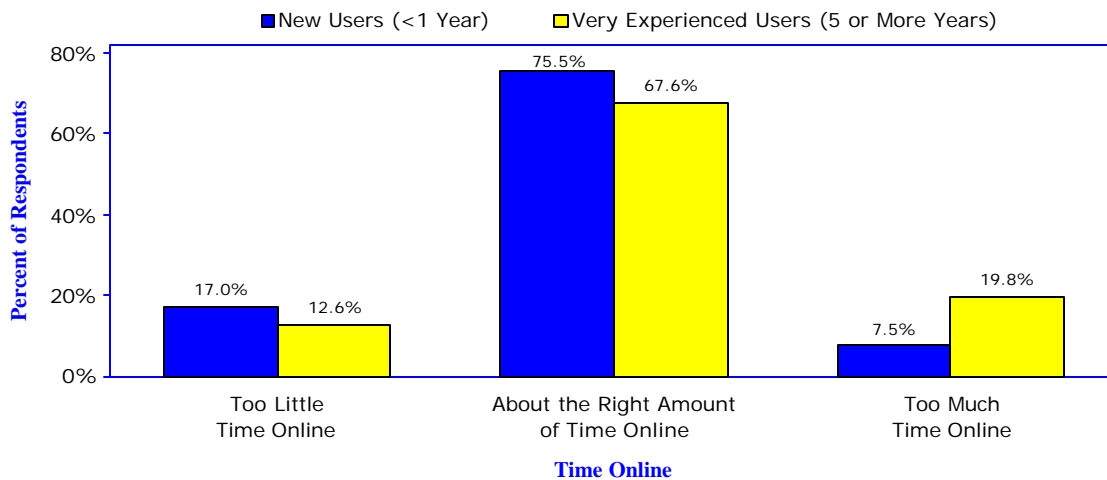
The real gap in responses about those under 18 and television viewing is between very experienced users as contrasted with Internet non-users and new users (see the chart below).

When asked about the amount of television viewing by children in their household, 34.7 percent of non-users and 38 percent of new users say the children watch too much television – compared to almost half (48.2 percent) of very experienced users.



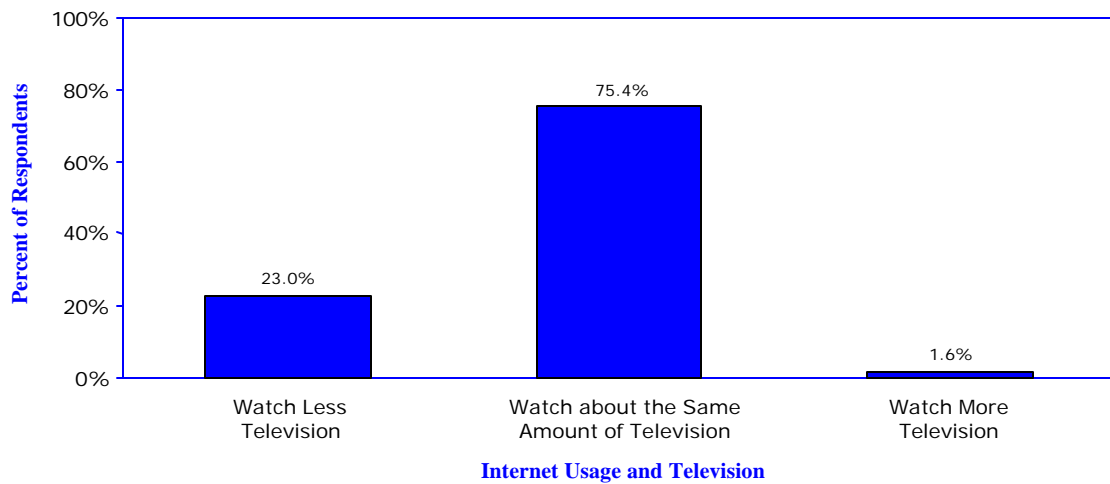
The number of respondents who say children in their households watch the right amount of television was again almost similar among non-users (63.3 percent) and new users (60.6 percent), compared to slightly more than half (51.1 percent) of very experienced users.

Surprisingly, more of the very experienced users than new users report that children go online too much.



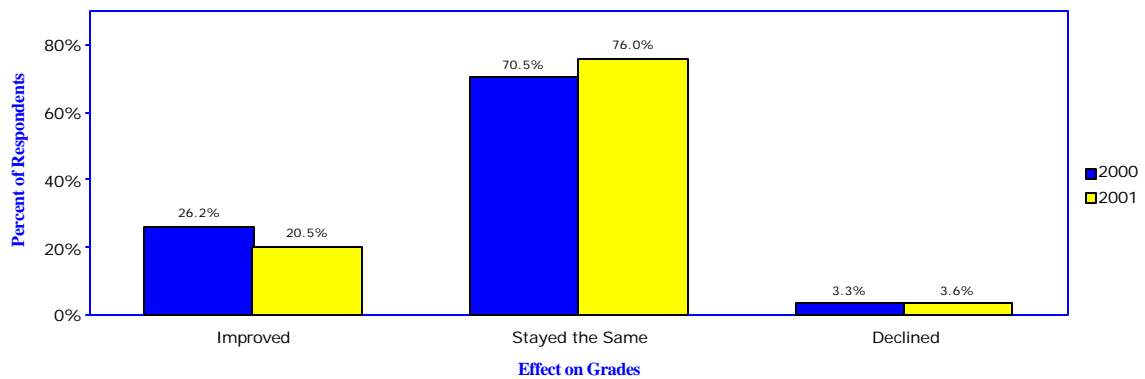
HAS INTERNET USE CHANGED CHILDREN’S TV VIEWING HABITS?

A new question in the 2001 survey asks how use of the Internet by children affects their television viewing. Almost one-quarter of children now watch less TV than before they started using the Internet.



SCHOOL GRADES AND THE INTERNET

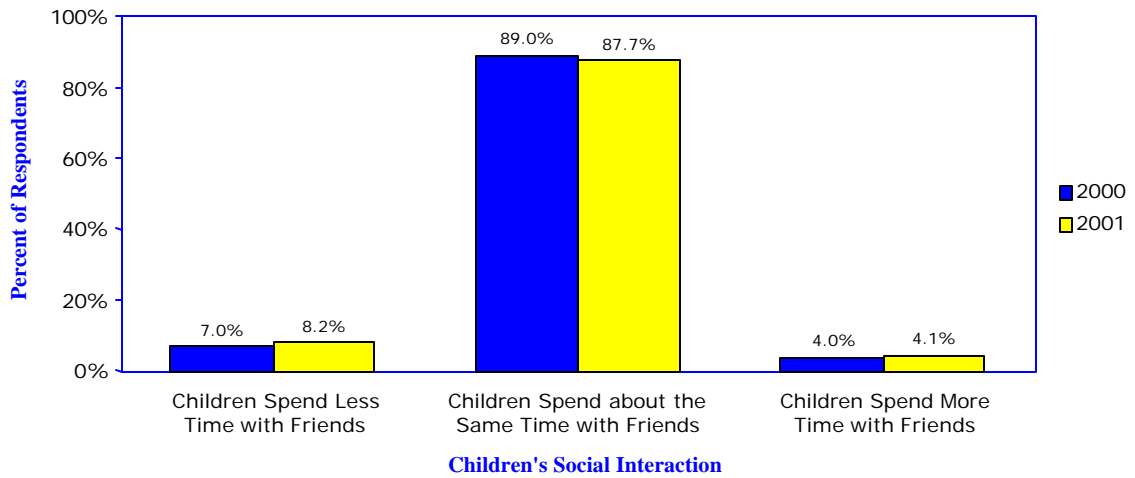
Does the Internet affect grades? More than three-quarters of adults in 2001 (76 percent) say that since their household acquired the Internet, the grades of children in their households have stayed the same – an increase from 70.5 percent in 2000.



Adults who say that children’s grades have improved since going online has declined in 2001 to 20.5 percent, down from 26.2 percent in 2000.

CHILDREN, THE INTERNET, AND INTERACTION WITH FRIENDS

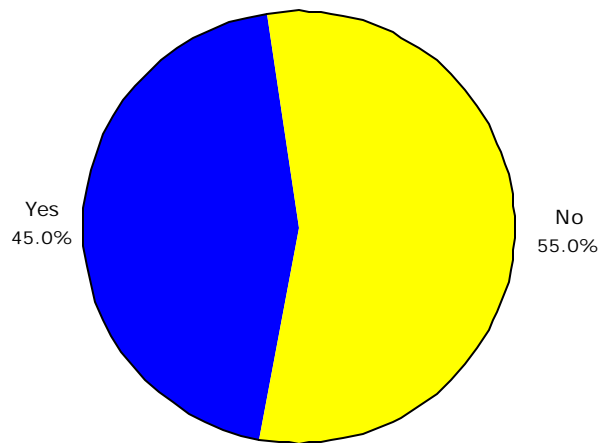
Respondents say that the Internet has little effect on children in their households and their interaction with friends.



In 2001, 91.8 percent of adults in households with children say that since they acquired the Internet, the children in their households spend about the same amount of time or more time with friends – down slightly from 93 percent in 2000.

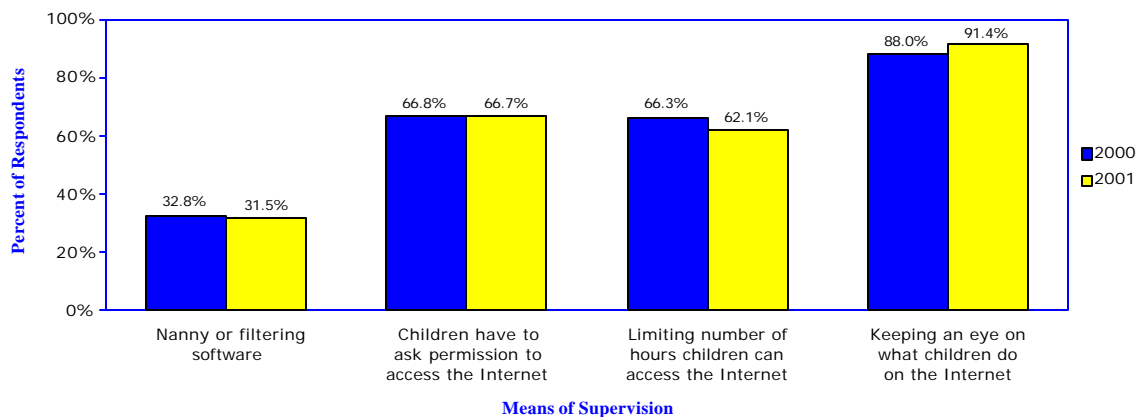
DO YOU TELL YOUR PARENTS EVERYTHING YOU DO ONLINE?

Do children share all of their Internet experiences with their parents? The answer is “no.” More than half (55 percent) of children ages 12-15 say they do not tell their parents everything they do on the Internet.



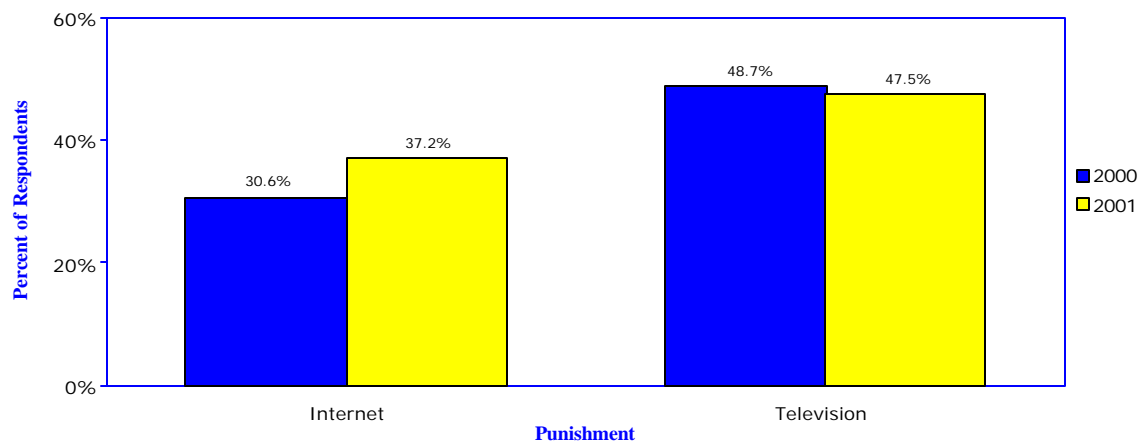
ADULTS AND INTERNET MONITORING

Adults continue to be vigilant about Internet use by children in their households. As in 2000, adult respondents to the 2001 survey say they keep a close watch on children’s Internet use, limit online hours, or use software to filter or block questionable Web sites.



INTERNET ACCESS: A PUNISHMENT TOOL?

Denying access to the Internet is used increasingly as a tool for punishing children – although still not as often as denial of television is used as punishment.



POLITICAL POWER AND INFLUENCE

Users in 2001 say the Internet continues to be an important resource for gathering information about political issues, but they do not believe that the Internet gives them more political power, or helps them influence political decisions and government officials.

In 2001, agreement declined to all three questions about the Internet's usefulness as a tool to gain political power and influence.

DOES THE INTERNET HELP WITH POLITICAL KNOWLEDGE?

When asked if "by using the Internet people like you can better understand politics," 45.1 percent of users agree or strongly agree – virtually identical to responses in 2000.

Those in 2001 who disagree or strongly disagree increased to 23.5 percent, up from 21.2 percent in 2000.

IS THE INTERNET A TOOL TO HELP GAIN POLITICAL POWER?

When asked if "by using the Internet people like you can have more political power," 25.6 percent of users agree or strongly agree, down from 29.3 percent in 2000.

Those in 2001 who disagree or strongly disagree increased to 45.3 percent, up from 37.3 percent in 2000.

CAN THE INTERNET GIVE USERS MORE SAY ABOUT WHAT THE GOVERNMENT DOES?

When asked if "by using the Internet people like you will have more say about what the government does," 20.9 percent of users in 2001 agree or strongly agree, down from 23.9 percent in 2000.

Those in 2001 who disagree or strongly disagree increased to 51.6 percent, up from 42 percent in 2000.

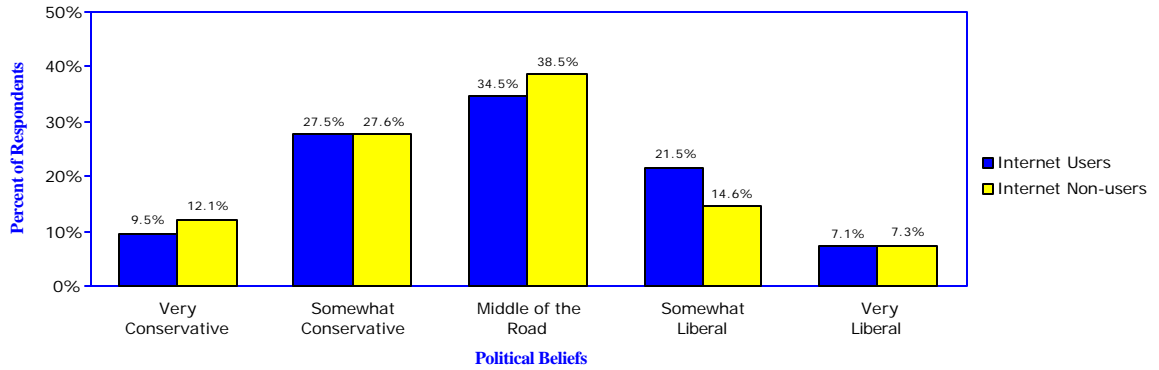
CAN THE INTERNET HELP MAKE PUBLIC OFFICIALS CARE ABOUT USERS' VIEWS?

Finally, when asked if "by using the Internet, public officials will care more about what people like you think," 24 percent of users agree or strongly agree, down from 27.8 percent in 2000.

Those in 2001 who disagree or strongly disagree increased to 44 percent, up from 36.4 percent in 2000.

POLITICAL AFFILIATION

As in 2000, there is little difference in the political orientation of Internet users and non-users in the 2001 study. A slightly higher proportion of users identify themselves as liberal, and slightly more non-users identify themselves as conservative.

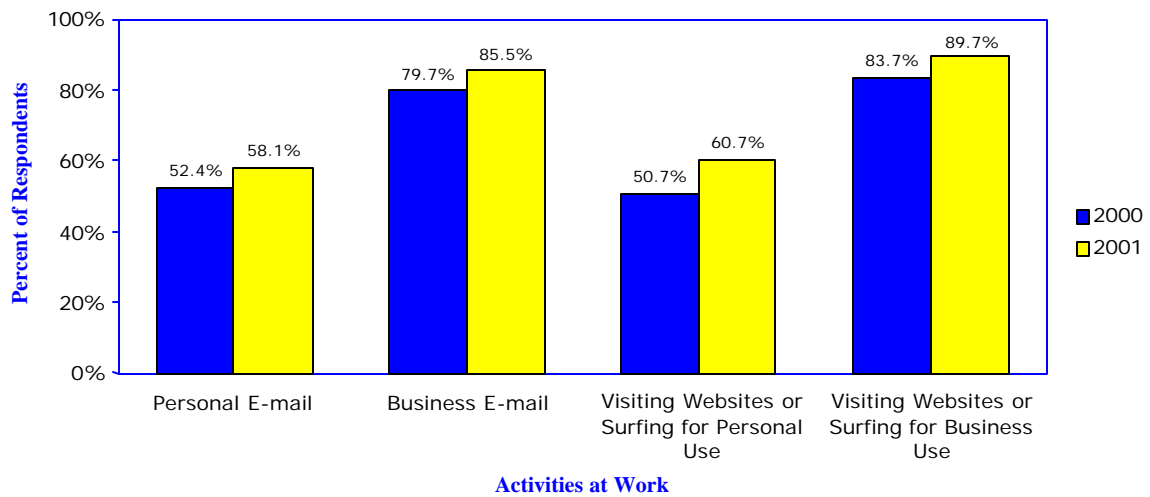


THE INTERNET AT WORK

While employers recognize the role of the Internet and e-mail for information-gathering and marketing, the technology continues to raise questions about productivity and potential abuse in the workplace. Monitoring e-mail and Internet use remains an issue for both management and employees.

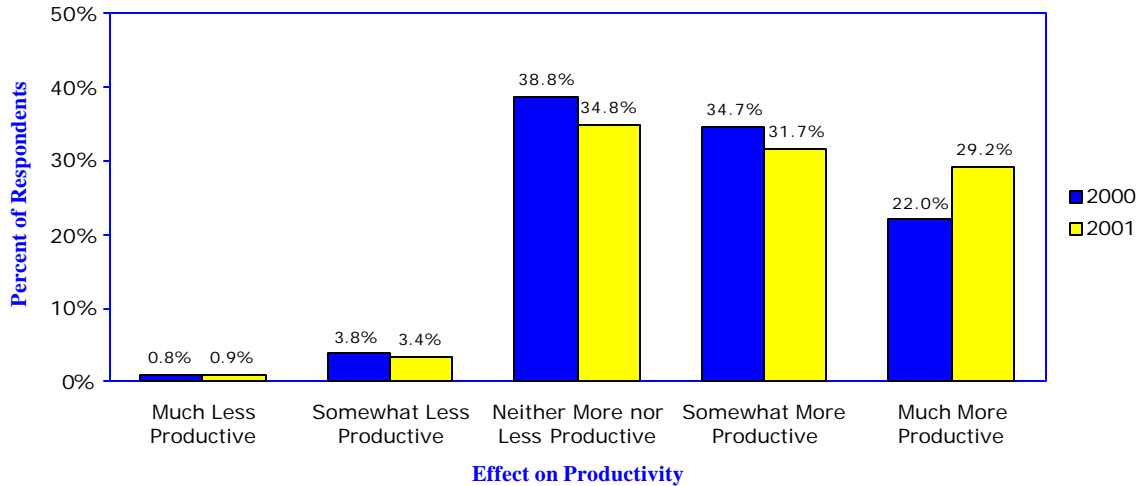
DO YOU USE THE INTERNET AT WORK?

Use of the Internet in the workplace has increased between 2000 and 2001 for both personal and professional uses.



DOES THE INTERNET AFFECT PRODUCTIVITY?

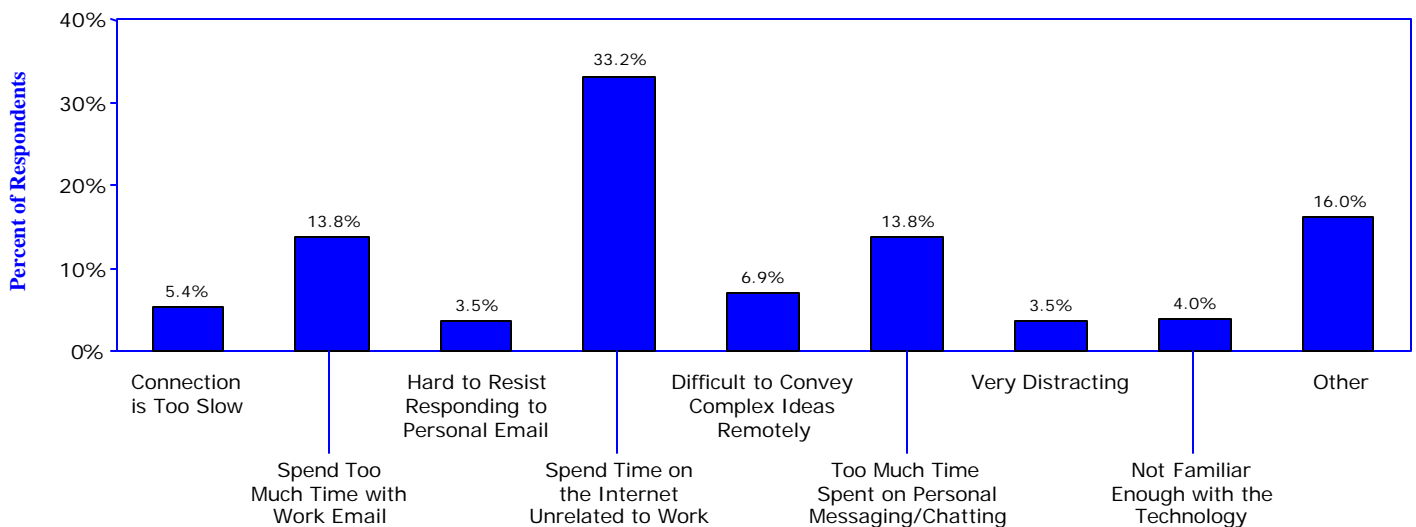
Is the Internet a catalyst for productivity? Users say yes, and in growing numbers.



In 2001, 60.9 percent of users say that access to the Internet at work makes them somewhat more productive or much more productive, up from 56.7 percent in 2000. The largest change was the increase among those who say the Internet makes them much more productive.

WHY DOES THE INTERNET AT WORK MAKE YOU LESS PRODUCTIVE?

Of employees who say the Internet makes them less productive at work, by far the number one reason they gave was that they spend time on the Internet doing things unrelated to work. Other top reasons are the time required to read and write business-related e-mail, and too much time spent on personal messaging and online chatting.



CONCLUSIONS

Three years ago, when the UCLA Internet Project was being developed, who could have foreseen the turbulent events and economic downturn that would lead to the collapse of the dot-com boom? As the effects of extravagance and short-sighted business planning within the high-tech sector took root, unrealistic projections about Internet business opportunities gave way to harsh economic realities that resulted in rapid contraction, layoffs, and retrenchment for much of the online world.

From the perspective of the UCLA Internet Project, a major question to consider in 2001 is: how did a backdrop of economic meltdown affect users and non-users of the Internet? Would Internet users lose faith in online technology? Would Internet use decline? Did the collapse of the Internet boom affect online purchasing and other uses?

The dot-com crash, combined with a general economic malaise in 2001, could have created an immense shift in online use, loss of credibility for the Internet among users, and dismal prospects for new access by non-users. Clearly, many issues of concern about the Internet remain from 2000, and new ones have emerged in 2001. Yet just as clearly, the Internet is more vigorous than ever; a large majority of Americans go online, Internet use continues to increase, and growing numbers of non-users expect to go online in the next year.

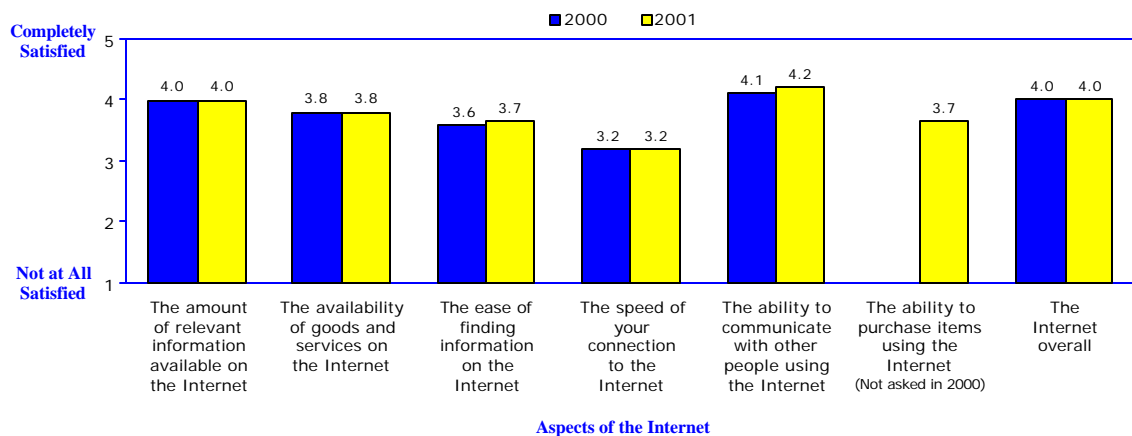
With that in mind, how do users and non-users feel about the Internet and other online technology?

ARE USERS SATISFIED OR DISSATISFIED WITH THE INTERNET?

Users of the Internet in 2001 are generally satisfied with online technology at about the same levels as in 2000. Overall, the Internet was rated 4.0 on a scale of 1 (not satisfied) to 5 (completely satisfied).

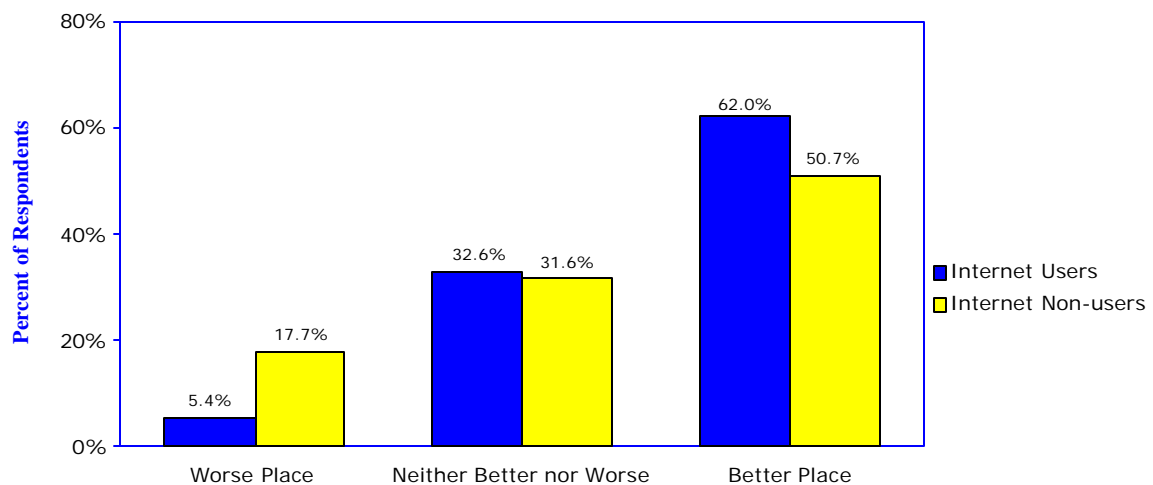
Specifically, users are most satisfied with the ability to communicate with other people on the Internet. In a new question for 2001, users rate the ability to purchase items online as 3.7 on a scale of 5.

Users are also generally satisfied with the amount of relevant information available online, the availability of goods and services, and the ease of search methods. Users were least satisfied with the speed of their connection to the Internet.



HOW HAS COMMUNICATION TECHNOLOGY AFFECTED THE WORLD?

Attitudes about the effect of communication technology on the world have shifted modestly in 2001 compared to 2000. Among Internet users, those who believe that communication technology has made the world a better place dropped slightly to 62 percent, down from 66 percent in 2000.



ISSUES AND TRENDS

Among the findings on more than 100 major issues explored in Year Two of the UCLA Internet Project, several topics, trends, and questions emerge as particularly noteworthy:

1. PRIVACY

Privacy is the paramount issue of concern about the Internet for users and non-users alike. Credit card security (see #5 below) is only part of the story; whether one buys online, or simply accesses the Internet for information, or is not a user at all, concerns about privacy remain at the root of a wide range of issues that affect the Internet.

How can Internet providers, users, and non-users dispel concerns about online privacy? The answer to that question is not clear – nor is it yet on the horizon.

2. NEW USERS VS. VERY EXPERIENCED USERS: A GAP

In question after question, the 2001 survey found tremendous differences between the online behavior and views of new users (with less than one year online) and very experienced users (five or more years online). For online marketers, technology developers, and Internet planners, understanding these differences will be crucial as Internet use continues to evolve.

3. INTERNET CREDIBILITY

While users in growing numbers consider the Internet an important source of information, the material available online continues to suffer from credibility problems among some users. About 58 percent of users in 2001 believe that most or all of the information on the Internet is reliable and accurate, and more than one-third say that only about half of online information is reliable and accurate.

New divisions are developing among Internet users: those who know how to discern good information and those who do not, or those who know how to find reliable information and those who do not. Many Internet users translate their inherent trust in traditional media to the information they see on the Internet. Is that credibility justified?

4. TELEVISION

From every perspective explored in the UCLA Internet Project, television is the primary victim of the growth of Internet use. Americans do not seem to sacrifice any element of their personal or social lives by using the Internet, except for time spent watching television.

These findings about television have profound implications for marketing, communications, and social behavior that are only now beginning to emerge. Primary among the intriguing issues to consider is that television is a passive leisure activity, while the Internet is an interactive technology that involves work, play, school, and social behavior. How will social attitudes and behavior change as America becomes less of a passive TV-viewing culture and more of a interactive Internet-using e-community?

5. ONLINE COMMERCE

Although online purchasing in general continues to be strong, and Internet purchasers report some shifts away from traditional retail buying, a smaller number of Internet purchasers in 2001 say they will increase their online purchasing. And, Internet shoppers do not believe that buying online gives them a price advantage. How will these issues affect online purchasing?

Most important are continuing broad concerns about using credit cards online. Consumers have widely divergent views about credit card security when used in traditional purchasing compared to online shopping; restaurant patrons who think nothing of leaving a signed credit card receipt on a table in a busy cafe are nevertheless extremely concerned about online security. Without question, broad shifts in perceptions about Internet security must occur before online purchasing can truly flourish.

6. FREE ONLINE SERVICES BECOMING PAY SERVICES

In 2001, business realities require many Internet organizations that provided free online services to transform them into Web sites that require a fee for use; that trend continues. These shifts, along with changes in free services that are developing as legal questions about access to information online unfold (such as the Napster case), are forcing Internet users to realize that many favorite online services may soon require a fee.

The 2001 UCLA Internet Project found that about 38 percent of users say they would pay a reasonable price for a free online service if it became a pay service; 29 percent are unsure if they would pay, and about 33 percent would not. This question, like many others in the survey, is a “glass is half-full or half-empty” issue; some marketers will rejoice that nearly 38 percent of users would be willing to pay for a service that they previously received for free, while others would despair because 62 percent are either neutral or disagree.

As online marketing trends change, and providers of free services continue to evaluate their pricing policies, this subject will continue to be important to watch in upcoming surveys.

7. THE RISE OF BROADBAND

We are particularly interested in tracking the changes that will result from the growing use of connections to the Internet that are faster than telephone modems, such as broadband. Will the use of broadband result in more Internet use because of more convenient and faster access, or less online time because use is more efficient? How will these changes influence the choices of online activities, household time together, television viewing, and other activities?

8. POST-SEPTEMBER 11: A FOLLOW-UP

The issues that have emerged from the September 11 terrorist attacks vividly illustrate that the Internet serves the best and worst of humanity; terrorists may have used the Internet to communicate and plan their attacks, but online services aided the recovery and created a network of outreach that brought the world closer together in an unprecedented outpouring of support.

The UCLA Internet Project completed the survey work for this report before September 11; clearly, follow-up study must explore a range of key issues that have emerged since then. We are planning a special report early in 2002 that explores the attitudes about the Internet and related behavior of users and non-users since September 11.

9. THE MAINSTREAMING OF THE INTERNET

Finally, in both 2000 and 2001, the UCLA Internet Project found that going online is a mainstream activity that transcends age, income, and education levels. Worth repeating here is a point made in the 2000 report: the Internet has become the fastest growing electronic technology in world history. In 1994, when the UCLA Center for Communication Policy, the Academy of Television Arts and Sciences, and then-Vice President Al Gore hosted the first "Information Superhighway" conference, the Internet had little immediate relevance in the daily lives of Americans.

Now, seven years later, a large majority of Americans use online technology, most users have e-mail, buying online is routine, and the Internet is viewed by new and experienced users alike as a key source of information.

Will the Internet continue to grow as a tool for information gathering, purchasing, and communication? If so, how will this growth affect the daily lives of Americans? Those issues will be our paramount concern as the UCLA Internet Project continues its explorations into the ever-evolving impact of online technology.

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SUPPLEMENT 1**THE UCLA CENTER FOR COMMUNICATION POLICY**

The UCLA Center for Communication Policy is a forum for the discussion and development of policy alternatives addressing the leading issues in media and communication. Communication policy at its core begins with the individual and the family.

The Center conducts and facilitates research, courses, seminars, working groups, and conferences designed to have a major impact on policy at the local, national, and international levels. In addition, it provides a base for visiting scholars who are engaged in efforts to examine and shape communication policy. The Center's goals include using the vast intellectual resources of UCLA to deal with some of the most important concerns of the day and to have a transforming effect on the issues.

The Center is based in the UCLA Anderson Graduate School of Management and maintains an affiliation with the university's College of Letters & Science.

In October 2000, the Center released the first UCLA Internet Report, the beginning of an international, long-term exploration of the impact of the Internet on society. This work is part of the World Internet Project, which is organized and coordinated by the Center; included in the World Internet Project are UCLA's work and partner studies in countries in Europe, the Middle East, South America, and Asia.

Since the creation of the Center for Communication Policy in September 1993, it has been awarded a multi-million-dollar national research grant, held numerous national and local conferences, conducted three nationwide surveys with one of America's leading news magazines, and established a national identity in the area of communication policy for the Center and UCLA.

In a short period of time, the UCLA Center for Communication Policy has become an internationally regarded policy studies center. The Center is committed to studying, through a variety of prisms, the important communication issues that transform our lives.

For more information about the Center, visit www.ccp.ucla.edu.

SUPPLEMENT 2

THE WORLD INTERNET PROJECT – INTERNATIONAL CONTACTS

UNITED STATES (ORGANIZER)

UCLA Center for Communication Policy
www.ccp.ucla.edu

CHINA

Chinese Academy of Social Sciences
www.cass.net.cn/philosophy/
CSD/Internetsurvey2000

FRANCE

Theseus International Management Institute
www.theseus.edu

GERMANY

European Institute for the Media
www.eim.org

HONG KONG

City University of Hong Kong
www.cityu.edu.hk

HUNGARY

Technical University of Budapest
www.bme.hu

INDIA

Indian Institute of Technology, Bombay
www.iitb.ernet.in

IRAN

Sharif University of Technology
www.sharif.ac.ir

ITALY

SDA Bocconi, Bocconi University
www.sdabocconi.it/oii/

JAPAN

Toyo University
www.toyo.ac.jp

KOREA

Yonsei University
www.yonsei.ac.kr

MACAU

University of Macau
www.umac.mo

SINGAPORE

School of Communication Studies
Nanyang Technological University
www.ntu.edu.sg/scs/main/welcome.htm

SWEDEN

World Internet Institute
www.worldinternetinstitute.net

TAIWAN

National Chung Cheung University
www.ccu.edu.tw

SUPPLEMENT 3

RESEARCH METHODS

In creating “Surveying the Digital Future,” the primary goal of the UCLA Internet Project is to create and maintain a representative sample of users and non-users in the United States. Here is the methodology that was used to conduct the project:

- For the 2001 UCLA Internet Project, interviews were conducted with 2,006 households throughout the 50 states and the District of Columbia.
- For both the original sample drawn last year and the replacement sample selected this year, a national Random Digit Dial (RDD) telephone sample using an Equal Probability Selection Method (EPSEM) was used. This sampling methodology gives every telephone number in the 50 states and the District of Columbia an equal chance of being selected.
- In the initial call, an interviewer spoke to a person in the household 18 years of age or older to obtain a roster of all household members. At this point, a computer system (“CFMC Servent” CATI) randomly selected one individual from among those 12 years of age and over in the household to be the interviewee from that household.
- If the randomly selected individual was between 12 and 17 years of age, the interviewer asked a parent or guardian for permission to interview the child.
- In the initial contact, once the selection of a household member was made, only that individual was eligible to complete the interview.
- Eight call attempts were made to complete an interview. If a household refused twice, it was not contacted again.
- When contacting panel members from the original sample, up to 16 call attempts were made to reach them. The same household member who participated last year was interviewed again. The only condition in which a new household member was accepted was if the person interviewed last year was no longer a member of the household.

- Those participating in the survey for the second year were paid a monetary incentive.
- Interviews were conducted in English and Spanish. Interviewing took place between May and July 2001.
- The data was compared to U.S. Census data to ensure that the sample was representative in terms of geographic distribution, race, age, sex, family composition, education, and household income.
- The sample was very close on all demographic categories except for minor discrepancies on education, gender, and race. To correct for this the data was weighted by these three factors. Sample size was preserved during the weighting process.

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