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**The UCLA Internet Report**  
**Surveying the Digital Future**  
**Year Three**



UCLA  
Center  
for  
Communication  
Policy

February 2003

THE UCLA INTERNET REPORT

# Surveying the Digital Future

YEAR THREE

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**THE UCLA INTERNET REPORT**  
**Surveying the Digital Future**  
YEAR THREE

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**UCLA Center for Communication Policy**  
**January 2003**

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The UCLA Center for Communication Policy thanks its foundation and corporate partners,  
whose participation in the World Internet Project make this work possible:

**National Science Foundation**  
**Hewlett-Packard**  
**Accenture**  
**America Online (AOL) Time Warner**  
**Microsoft**  
**Sony**  
**Verizon**  
**SBC**  
**DirecTV**  
**National Cable Television Association**

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## **HIGHLIGHTS:**

# **UCLA INTERNET REPORT – YEAR THREE**

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

In 2001 and 2002, the UCLA Internet Project continued its year-to-year appraisal of more than 100 major issues, focusing on Internet users vs. non-users, as well as new users (less than one year of experience) compared to very experienced users (six or more years of experience).

Here are highlights of the five major areas in the Year Three of the UCLA Internet Project:

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

### OVERALL INTERNET ACCESS, ONLINE HOURS, INTERNET USE AT HOME

- Year Three of the UCLA Internet Project found that Internet access remained generally stable from 2001 to 2002, while online hours continue to increase, as does use of the Internet at home. (Page 17)

### THE TOP FIVE MOST POPULAR INTERNET ACTIVITIES (PERCENTAGE OF USERS)

- The top five online activities in 2002 were e-mail and instant messaging, Web surfing or browsing, reading news, shopping and buying online, and accessing entertainment information. (Page 18)

### INTERNET USERS: ACROSS ALL AGE RANGES

- Each of the three studies by the UCLA Internet Project shows that Internet access spans every age range – and in some age ranges, access approaches 100 percent. (Page 21)

### HOW LONG ARE YOU ONLINE EACH WEEK?

- The average number of hours online per week continued to grow in 2002. Users reported an average of 11.1 hours online per week, up from 9.8 in 2001 and 9.4 in 2000. (Page 22)
- New Internet users in 2002 went online an average of 5.5 hours per week. (Page 22)

### USING THE INTERNET AT HOME

- Use of the Internet at home grew steadily in 2002, increasing to 59.3 percent of respondents – a steady increase across all three UCLA studies. (Page 23)

### TECHNOPHOBIA

- Technophobia affects respondents at all levels of experience using the Internet; 30.3 percent of new users and 10.8 percent of very experienced users report some technophobia. (Page 24)

### HOW DO YOU CONNECT TO THE INTERNET AT HOME?

- Most households with Internet access still connect to online service with a telephone modem; however, broadband access has increased, and modem access is declining. (Page 25)

### BROADBAND VS. MODEM: HOW DO THEY AFFECT ONLINE USE?

- Broadband users spend more time online than modem users in the most popular Internet activities. (Page 25)

### HOW MANY WORKING COMPUTERS AT HOME?

- Almost one-quarter of respondents (24.1 percent) have more than one working computer in their homes. Nearly 10 percent (9.5 percent) have three or more working computers. (Page 26)

### ARE YOUR COMPUTERS AT HOME NETWORKED TO EACH OTHER?

- Home networking of computers is a growing trend; 32 percent of respondents with two or more computers at home have networked them. (Page 27)

### NON-USERS: WHY NOT ONLINE?

- The 28.9 percent of Americans who did not use the Internet in 2002 expressed a range of reasons for not being online. The primary reason is lack of the technology; 31.9 percent of non-users say they either do not have a computer or their current computer is not adequate. (Page 28)

### ELECTRONIC DROPOUTS: WHY?

- The primary reason given by “electronic dropouts” – Internet non-users who were once users – for not currently being online is “no computer available.” (Page 28)
- Nearly half of electronic dropouts say they miss nothing without Internet access. (Page 29)

### NON-USERS: WILL YOU LOG ON SOON?

- The number of non-users who say they will go online within the next year has continued to grow in each successive year of the UCLA Internet Project. Of non-users in 2002, 47 percent said they are somewhat likely or very likely to go online in the next year. (Page 30)

## **MEDIA USE AND TRUST**

### **TELEVISION: VIEWING CONTINUES TO DECLINE AMONG INTERNET USERS**

- The trend across the three years of the UCLA Internet Project shows that Internet users may be “buying” their time to go online from hours previously spent watching television. (Page 33)
- Overall, Internet users watched less television in 2002 than in 2001; 11.2 hours per week in 2002, compared to 12.3 hours in 2001. In 2002, Internet users watched about 5.4 hours of television less per week than non-users – this compared to 4.5 hours in 2001. (Page 33)
- Almost one-third of children now watch less television than before they started using the Internet at home – up from 23 percent in 2001. (Page 67)
- The decline in television viewing becomes even more pronounced as Internet experience increases; more than twice as many of the very experienced users than new users say that they spend less time watching television since using the Internet. (Page 34)

### **THE INTERNET: AN IMPORTANT SOURCE OF INFORMATION AND ENTERTAINMENT?**

- The Internet is viewed as an important source of information by the vast majority of people who go online; in 2002, 60.5 percent of all users considered the Internet to be a very important or extremely important source of information. (Page 35)
- The perceived value of online content as an important source of entertainment has varied only slightly from 2000 to 2001 to 2002. In 2002, 25 percent of users said that the Internet is a very important or extremely important source of entertainment. (Page 36)

### **THE INTERNET'S IMPORTANCE: BROADBAND VS. TELEPHONE MODEM USERS**

- The Internet's importance as a source of both information and entertainment is higher among those who access the Internet via broadband than those with telephone modems. (Page 37)

### **IS INFORMATION ON THE INTERNET RELIABLE AND ACCURATE?**

- The number of users who believe that information on the Internet is reliable and accurate continued to decline in 2002. In 2002, 52.8% of users believed that most or all of the information online is reliable and accurate – a decline from both 2001 and 2000. (Page 38)
- More than one-third of users (39.9 percent) in 2002 said that only about half of the information on the Internet is reliable and accurate. (Page 38)

## CONSUMER BEHAVIOR

### INTERNET PURCHASING: DO YOU BUY ONLINE? HOW MUCH? HOW OFTEN?

- Fewer adults bought online in 2002 than in 2001 or 2000. (Page 40)
- While the overall number of buyers in 2002 declined, their average number of purchases increased substantially over 2001. (Page 40)
- The average dollars spent by online buyers in 2002 also increased substantially over 2001, but was still lower than in 2000. (Page 41)

### INTERNET PURCHASING: DOES IT AFFECT BUYING IN RETAIL STORES?

- In 2002, online buying replaced some purchasing in retail stores for many Internet users, and at higher levels than in 2001. (Page 43)

### HOW LONG BEFORE YOUR FIRST ONLINE PURCHASE?

- Many Internet users say they waited months or years before buying online. Almost half of Internet buyers (49.3 percent) waited more than two years after going online before making their first purchase. One-third waited more than three years. (Page 43)

### WHY WAIT TO MAKE THE FIRST PURCHASE?

- For online buyers who waited several months or more after starting to use the Internet before making their first online purchase, concern about using a credit card online far outweighs any other reason. (Page 44).

### ONLINE PURCHASING: WILL IT INCREASE?

- A growing number of Internet purchasers in 2002 reported that their online buying is likely to increase; 71.2 percent of 2002 respondents agreed that they will probably make more purchases online, compared to 66.1 percent in 2001 and 54.5 percent in 2000. (Page 46)

### ARE YOU CONCERNED ABOUT YOUR PRIVACY WHEN BUYING ONLINE?

- Several questions in the 2002 UCLA Internet Project continue to reveal high levels of concern about the privacy of personal information when or if respondents buy online. Yet overall, concerns declined slightly in 2002 from 2001. (Page 48)

### CONCERNS ABOUT CREDIT CARD INFORMATION: A CONTINUING MAJOR PROBLEM

- While worries about personal privacy online may have declined in 2002, concerns about credit card security on the Internet remained as high as ever. Overall, 92.4 percent of all respondents age 18 or over expressed some concern about the security of their credit card information if they ever buy online. (Page 50)
- Very experienced users described much lower – but still relatively high – levels of concern than did new users about credit card security on the Internet. (Page 50)

### WHAT ARE YOUR CONCERNS ABOUT USING CREDIT CARDS ONLINE?

- When asked about the specific reasons for their concerns about using credit cards online, respondents most frequently say that “hackers” are a reason for concern. “Too many unknowns” about online purchasing is the second most-cited reason. (Page 52)
- Notably, 8.7 percent of respondents say they are extremely concerned because they know someone who has been a victim of credit card fraud. (Page 52)

### WHAT WOULD REDUCE YOUR CONCERNS ABOUT USING A CREDIT CARD ONLINE?

- For nearly one-quarter of the respondents (23.1 percent) who have concerns about using their credit cards online, nothing will reduce their concerns about using a credit card online. (Page 52)

## COMMUNICATION PATTERNS

### **ARE INTERNET USERS COMMUNICATING MORE WITH FAMILY AND FRIENDS?**

- More than half of users in 2002 said that since starting to use the Internet, they increased the number of people with whom they stay in contact. (Page 55)

### **E-MAIL CONTACT, PERSONAL CONTACT**

- E-mail users maintain weekly online contact with an average of 8.7 correspondents. Of those people, e-mail users meet an average of 3.4 correspondents face-to-face. (Page 56)

### **MULTIPLE E-MAIL ADDRESSES**

- While more than half of e-mail users (52.6 percent) say they only maintain one e-mail account, almost 20 percent (18.3 percent) say they maintain three or more accounts. (Page 57)

### **WHY MULTIPLE E-MAIL ADDRESSES?**

- E-mail users report a variety of reasons for maintaining multiple e-mail addresses. The most often cited reason is separating work e-mail from personal e-mail. (Page 57)

### **OPINIONS ABOUT THE VALUE OF E-MAIL**

- Large majorities of e-mail users say that online communication: does not require too much time; makes them more likely to keep in contact with other people with e-mail; and allows them to communicate with people they normally could not. (Page 59)
- Most e-mail users are not frustrated with those without e-mail. (Page 59)

### **E-MAIL AT THE OFFICE: BUSINESS AND PERSONAL USE**

- Internet users continue to report high levels of e-mail access at work for both personal and professional use. More than 83 percent of those who used the Internet at work in 2002 accessed business e-mail from work, slightly lower than 2001 but higher than 2000. (Page 73)

### **SCREEN NAMES: HOW MANY DO YOU MAINTAIN?**

- Many Internet users maintain more than one screen name that is used for e-mail, chat rooms, instant messaging, and other online communication. Internet users average 2.2 screen names. (Page 60)

### **DO YOU USE MULTIPLE SCREEN NAMES WITH DIFFERENT PERSONALITIES?**

- A small number of users across all age ranges report that they have multiple screen names, each of which is associated with its own personality. (Page 60)

## SOCIAL EFFECTS

### TIME WITH FAMILY, TIME WITH FRIENDS

- Most Internet users in 2002 continued to believe that the time they spend online has no influence on the amount of time they spend with their family, or time spent with friends. (Page 62)

### WHERE DO CHILDREN USE THE INTERNET?

- Most children who use the Internet go online at home. Well over 80 percent of children who used the Internet in 2002 went online at home – about the same as in 2001 but higher than 2000. (Page 65)
- Nearly three-quarters of children who used the Internet in 2002 went online at school, up from 63.1 percent in 2000. (Page 65)

### CHILDREN ONLINE AND WATCHING TELEVISION: THE RIGHT AMOUNT OF TIME?

- 44.9 percent of adults say that the children in their households spend too much time watching television, while far fewer (18.3 percent) say children spend too much time online. (Page 66)
- A large but declining number of adults in 2002 – 81.7 percent – said the children in their household spend “about the right amount of time” or “too little time” online. (Page 66)
- The number of adults who say that children spend too much time online has drifted upward over the three years of the UCLA Internet Project. (Page 66)

### SCHOOL GRADES AND THE INTERNET

- The Internet is not perceived by most users as having an effect on school grades; nearly three-quarters of adults in 2002 said that since their household acquired the Internet, the grades of children in their households have stayed the same. (Page 67)

### CHILDREN, THE INTERNET, AND INTERACTION WITH FRIENDS

- Almost all adults say the Internet has no effect on children’s interaction with friends. (Page 68)

### POLITICAL POWER AND INFLUENCE

- All three years of the UCLA Internet Project have found that going online can be an important resource for gathering information about political issues; however, relatively small numbers of users believe that the Internet gives them more political power, or helps them influence political decisions and government officials – and those numbers are declining. (Page 69)

### THE INTERNET AT WORK: BUSINESS AND PERSONAL USE

- Internet users continue to report growing levels of online access at work for both personal and professional use. Of those who had Internet access at work in 2002, about 90 percent visit Web sites for business purposes; 60.5 percent visit Web sites for personal use while at work. (Page 72)

### DO EMPLOYERS MONITOR E-MAIL AND INTERNET USE AT WORK?

- About 45 percent of respondents who used e-mail at work in 2002 said their e-mail is monitored by their employers – about the same as in 2001. An almost identical percentage of respondents said their employers monitor their use of the Web either somewhat or closely. (Page 74)

### DOES THE INTERNET AFFECT PRODUCTIVITY?

- In 2002, nearly two-thirds of users (64.5 percent) said that access to the Internet at work makes them more productive – an increase over both 2001 and 2000. (Page 75)

### ARE USERS SATISFIED OR DISSATISFIED WITH THE INTERNET?

- Overall, users of the Internet in 2002 were satisfied with online technology, rating satisfaction with the Internet at 4.0 on a scale of 1 (not satisfied) to 5 (completely satisfied). (Page 77)
- Users are most satisfied with the ability to communicate with other people on the Internet. Users continue to be least satisfied with the speed of their connection to the Internet. (Page 77)

The UCLA Internet Report  
**Surveying the Digital Future**  
Year Three

Welcome to “Surveying the Digital Future,” the report of Year Three of the UCLA Internet Project.

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 third 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 2002 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 the United States, compiling the responses of Internet users and non-users. Each year we contact the same households to explore how online technology affects the lives of those who continue to use the Internet, those who remain non-users, and those who move from being non-users to users, and vice versa. We are also noting 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 now 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 gather 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 85). 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 have been allied with an unprecedented array of corporations – several of which are direct competitors – and foundations, including the National Science Foundation, Hewlett-Packard, Accenture, America Online (AOL) Time Warner, Microsoft, Merrill Lynch, Sony, Verizon, SBC, Disney, DirecTV, and the National Cable Television Association.

### **THE UCLA INTERNET PROJECT: KEY AREAS**

The third UCLA Internet Report includes findings that compare Internet users to non-users, new users (less than one year online) to very experienced users (six 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 Effects**

The 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 from year three 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

# **Surveying the Digital Future**

YEAR THREE

# INTERNET USERS AND NON-USERS

## WHO IS ONLINE? WHO IS NOT?

## WHAT ARE USERS DOING ONLINE?

Who used the Internet in 2002? How did the experiences of users and non-users differ?

Equally important – or perhaps more important – do the views of online users change as they progress from being “new users” (less than one year using the Internet) to “very experienced users” (six or more years on the Internet)?

\* \* \* \* \*

Year Three of the UCLA Internet Project found that overall Internet access remained generally stable from 2001 to 2002, but the number of hours users were online continued to increase, as did use of the Internet at home.

- **Overall, Internet access remained generally stable from 2001 to 2002. More than 70 percent (71.1 percent) of Americans in 2002 went online, compared to 72.3 percent in 2001 (a statistically insignificant difference), but up from 66.9 percent in the first UCLA Internet Project in 2000.**
- **While the number of Internet users stabilized in 2002, the number of hours online continued to increase – rising to an average of 11.1 hours per week in 2002, up from 9.8 hours in 2001 and 9.4 hours in 2000.**
- **Almost 60 percent of users (59.4 percent) have Internet access at home, a substantial increase in only two years from the 46.9 percent of users who reported home Internet access in 2000, the first year of the UCLA Internet Project.**

With a large majority of Americans now having access to the Internet, and hours online and home access continuing to rise, the larger questions remain: Who is going online, and who is not? How are Americans using the Internet? How does Internet use affect buying habits, family life, friendships, privacy, credit card security, and other time commitments?

## INTERNET ACCESS AND USE: 2000, 2001, AND 2002

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

Year Three of the UCLA Internet Report found growth in the number of hours online, Internet access at home, and use of the Internet by children in school.

### INTERNET ACCESS

	2000	2001	2002
■ Total Americans who use the Internet	66.9%	72.3%	<b>71.1%</b>
■ Internet use at home	46.9%	58.4%	<b>59.3%</b>
■ % of students who use the Internet at school	59.9%	72.9%	<b>73.7%</b>
■ % of employed who use the Internet at work outside the home	42.3%	51.2%	<b>51.2%</b>

### HOURS ONLINE

■ Average numbers of hours online per week	9.4	9.8	<b>11.1</b>
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### NUMBER OF YEARS ONLINE

■ Less than one year			<b>5.4%</b>
■ One year to less than two years			<b>9.7%</b>
■ Two years to less than four years			<b>28.7%</b>
■ Four years to less than six years			<b>29.0%</b>
■ Six or more years			<b>27.3%</b>

### THE TOP FIVE MOST POPULAR INTERNET ACTIVITIES (PERCENTAGE OF USERS)

1. E-mail and instant messaging	81.6%	87.9%	<b>87.9%</b>
2. Web surfing or browsing	81.7%	76.3%	<b>76.0%</b>
3. Reading news	56.6%	47.6%	<b>51.9%</b>
4. Accessing entertainment information	54.3%	47.9%	<b>46.4%</b>
5. Shopping and buying online	50.7%	48.9%	<b>44.5%</b>

The top 6-10 online activities for 2002: 6. Hobbies (43.7%); 7. Travel information (36.2%); 8. Medical information (35.5%); 9. Playing games (26.5%); 10. Tracking credit cards (24.2%).

### ONLINE SPENDING PER MONTH (PURCHASERS ONLY)

■ Less than \$15	21.5%	36.2%	<b>10.9%</b>
■ \$15-\$175	59.8%	55.4%	<b>75.7%</b>
■ Greater than \$175+	18.7%	8.4%	<b>13.4%</b>

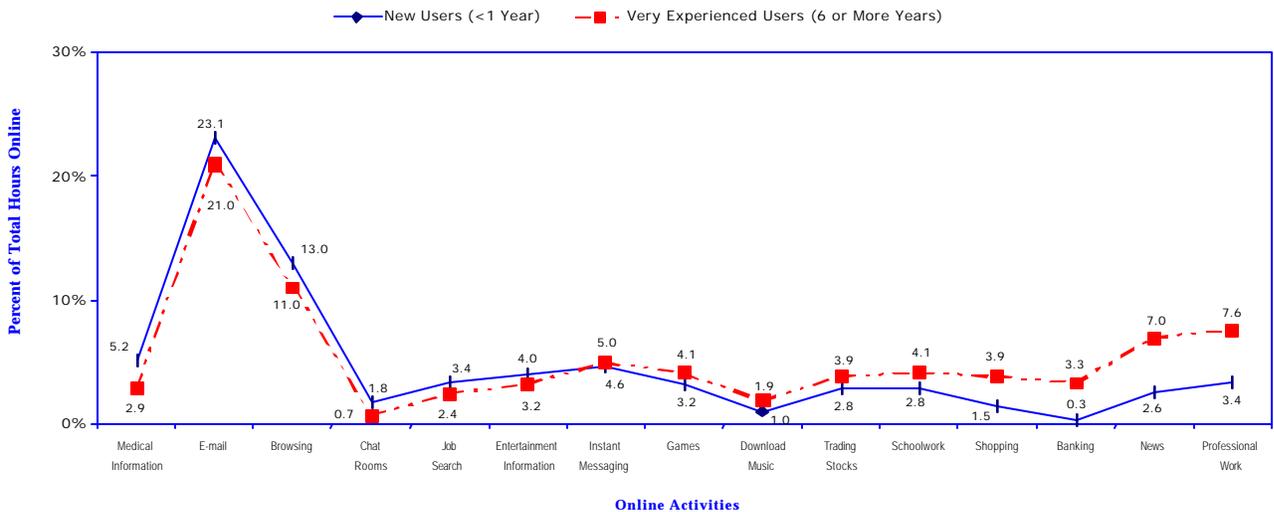
### NEW USERS VS. VERY EXPERIENCED USERS: WHAT DO THEY DO ONLINE?

In all three surveys conducted by the UCLA Internet Project, some of the most revealing findings compare the online activities of new users (less than one year online) with the activities of very experienced users (six or more years in the 2002 study, five or more years in 2001, and four or more years in 2000).

In 2002, very experienced Internet users spent the largest percentage of their time dealing with e-mail, browsing, professional work, news, and schoolwork at levels that have remained relatively constant during all three years of the survey. New users also spent the largest percentage of their time with e-mail and browsing, followed by searching for medical information, entertainment information, and professional work.

The largest gap between new users and very experienced users is illustrated by higher levels of Internet use for professional work and news among very experienced users, compared to new users.

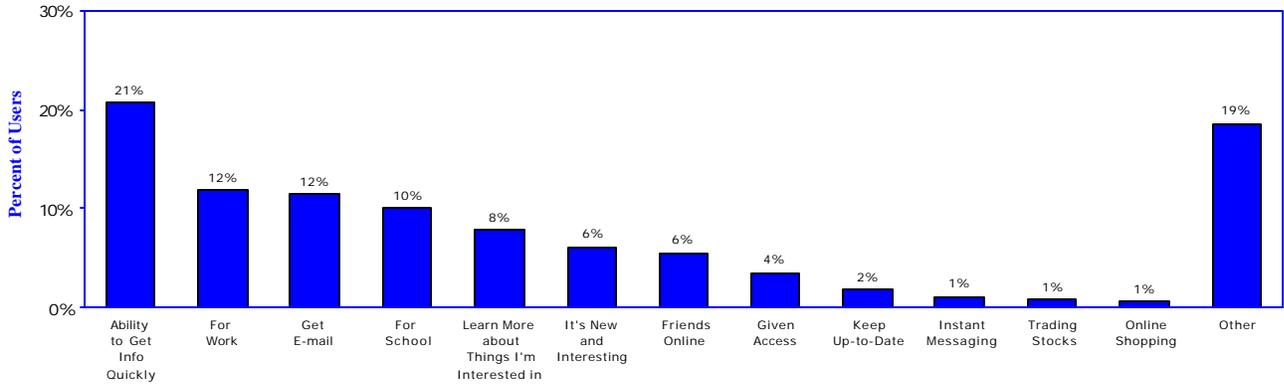
Use of the Internet: Online Activities



**GOING ONLINE: THE PRIMARY REASON**

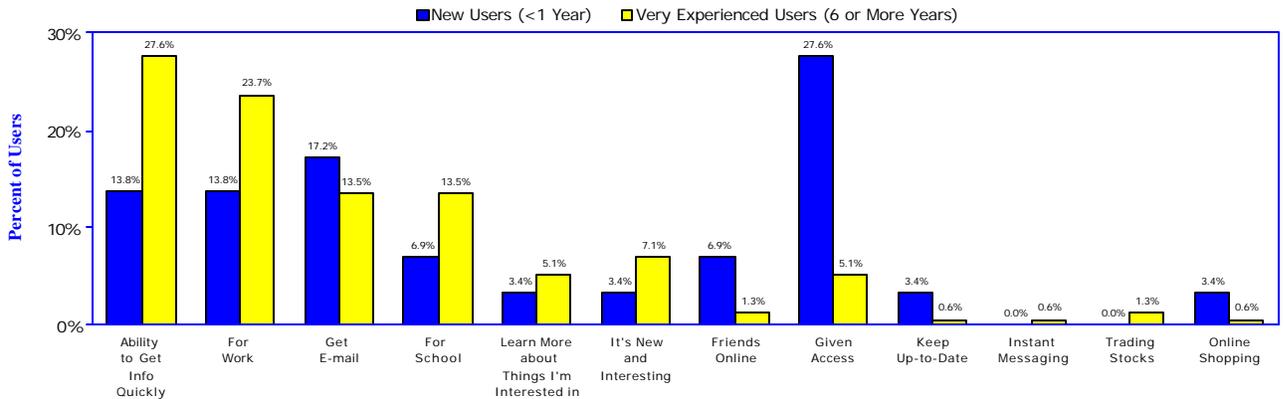
What are the primary reasons users cite for starting to use the Internet? Overall, the top three reasons in both 2002 and 2001 were obtaining information quickly, followed by work needs, and access to e-mail.

**Why Did You Start Using the Internet?**



New users and very experienced users cite varying reasons why they originally went online. For new users, by far the most-cited reason was being given free Internet access, followed by e-mail, the ability to get information quickly, and work. For very experienced users, the reason they cite most often for originally using the Internet six or more years ago was the ability to get information quickly (a true novelty for the new Internet user in 1995 or before), followed by work needs, e-mail, and school needs.

**Reasons To Start Using The Internet: New Users Vs. Very Experienced Users**

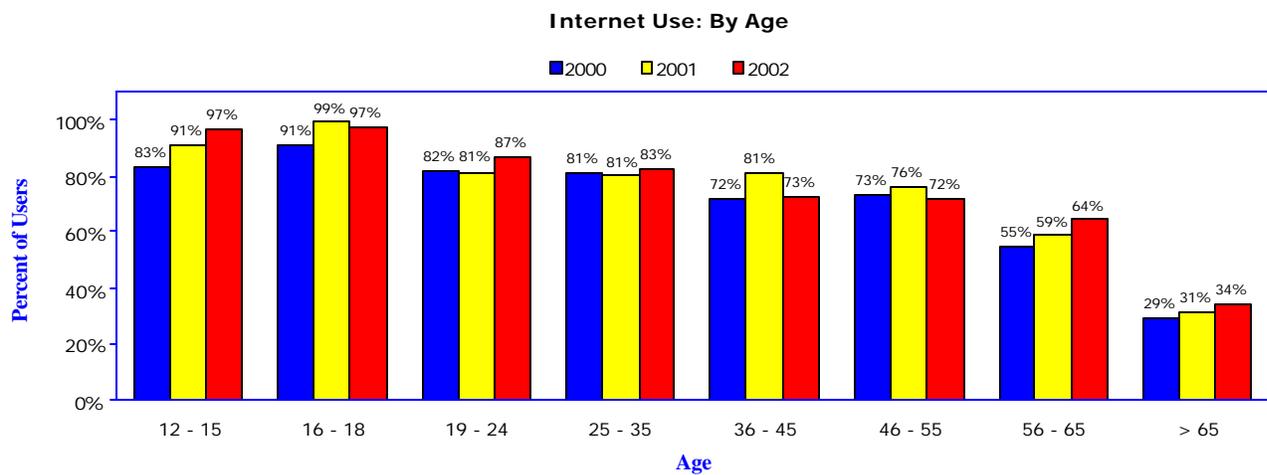


### INTERNET USERS: ACROSS ALL AGE RANGES

Each of the three studies by the UCLA Internet Project shows that Internet access spans every age range – and in some age ranges, access approaches 100 percent.

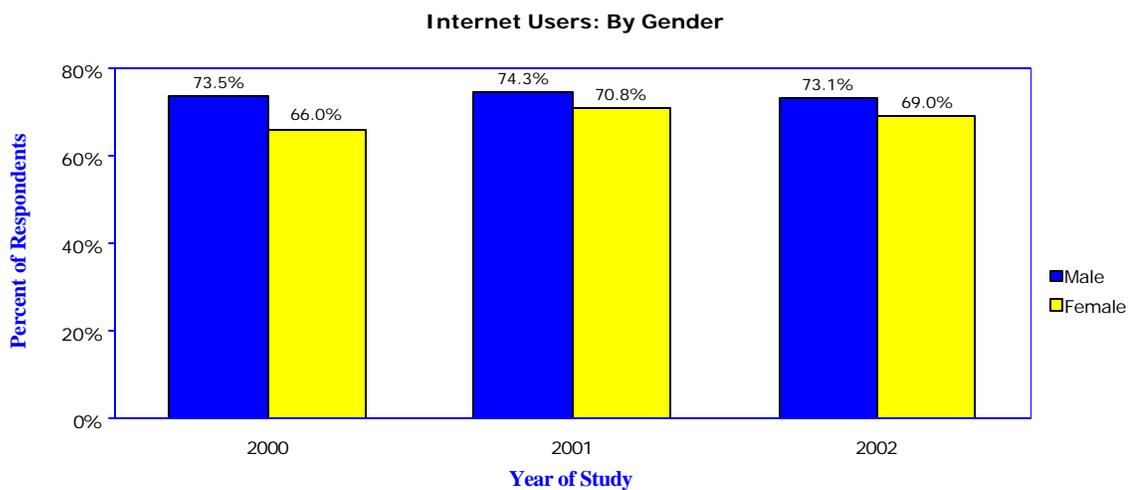
Not surprisingly, Internet use is highest among those age 35 and under, with especially high use among those age 18 and under. However, Internet users in 2002 represented at least two-thirds of respondents in most age ranges.

Even use among the older respondents is showing steady growth; more than one-third (34 percent) of those over 65 went online in 2002 – up from 29 percent when the UCLA Internet Project began in 2000.



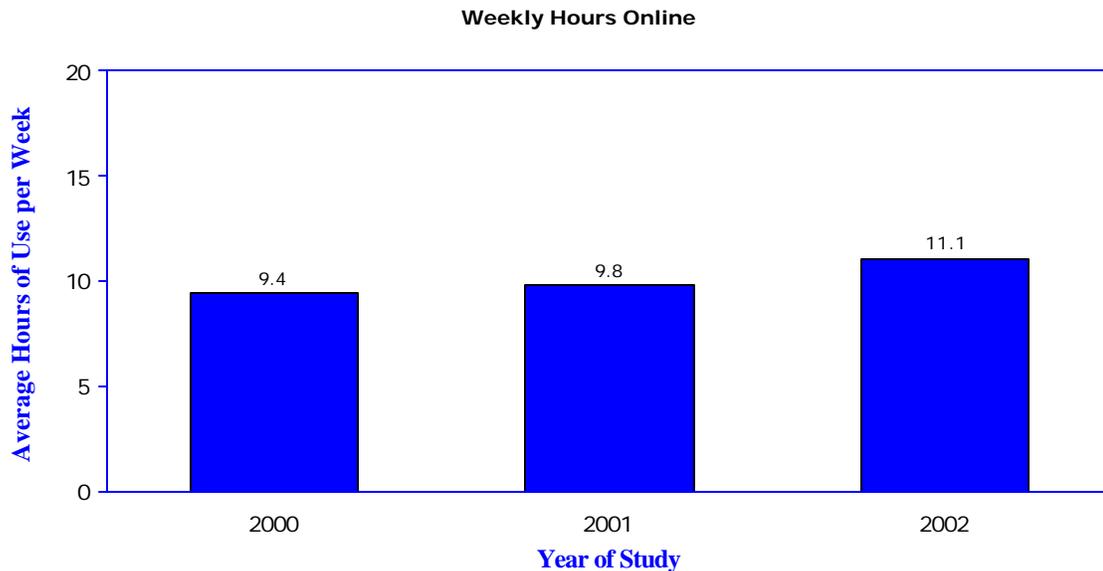
### MEN AND WOMEN ONLINE

Each study conducted by the UCLA Internet Project found that almost equal numbers of men and women use the Internet, with men holding a slight edge.



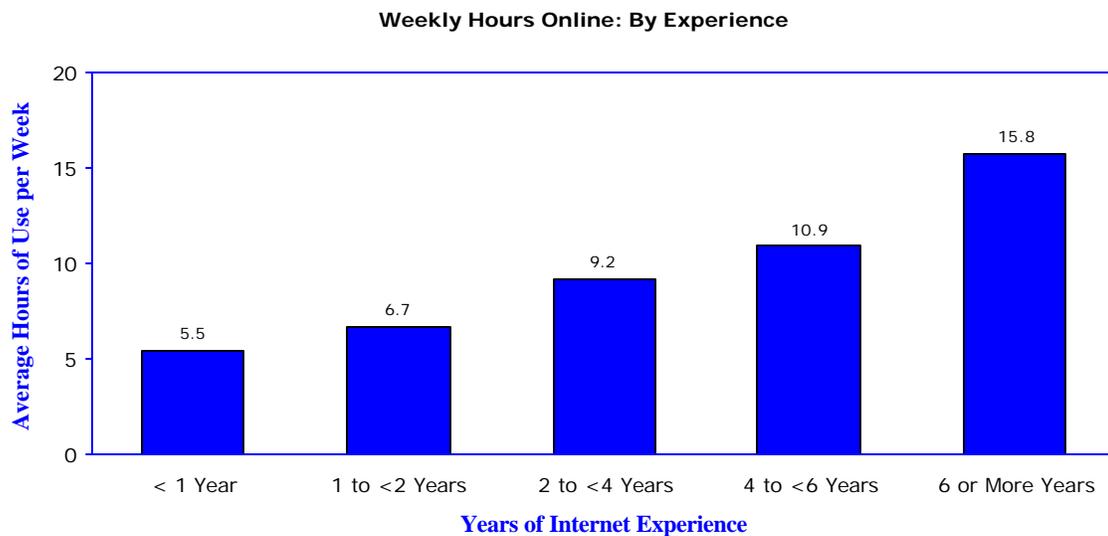
## HOW LONG ARE YOU ONLINE EACH WEEK?

The average number of hours online per week continued to grow in 2002. Users reported an average of 11.1 hours online per week, up from 9.8 in 2001 and 9.4 in 2000.



Each of the three studies by the UCLA Internet Project has 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 (six or more years online) are online nearly three times as long per week as new users (less than one year of experience).

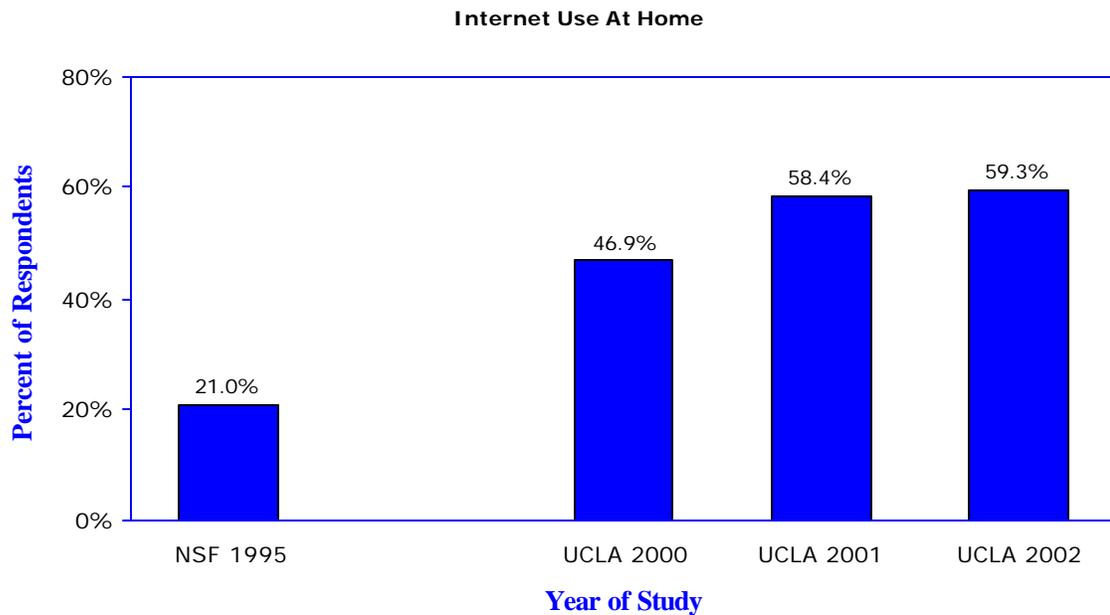
A finding that continues to be worth noting is the amount of time that even the new Internet users are online: in 2002, an average of 5.5 hours per week (down slightly from 6.5 hours in 2001 and 6.1 hours in 2000).



## USING THE INTERNET AT HOME

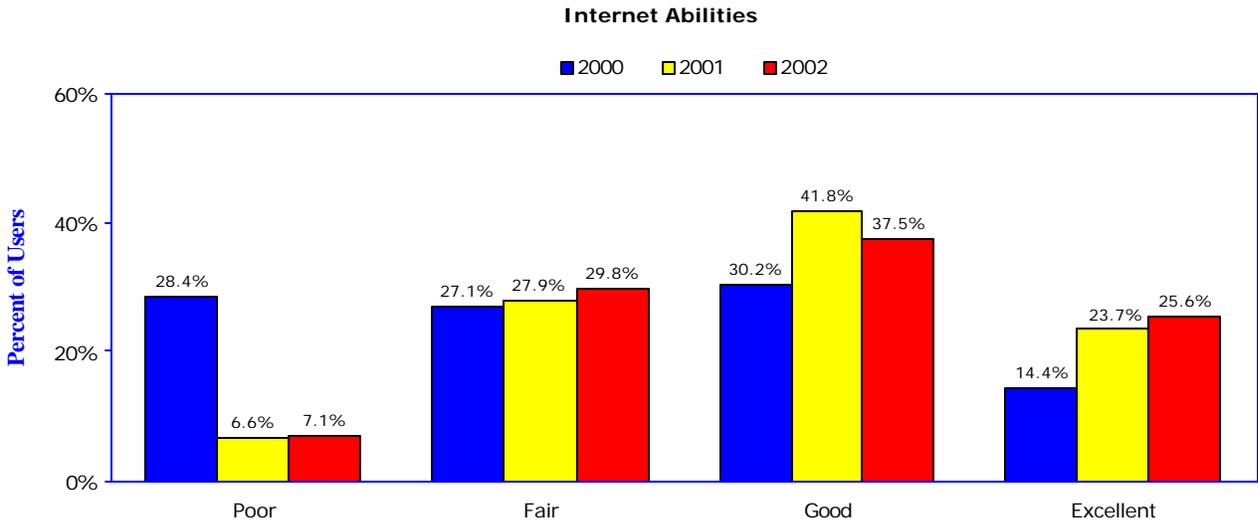
The 2002 study showed that use of the Internet at home is growing steadily.

In 1995, a report by the National Science Foundation showed that only about one-fifth of respondents had access to the Internet at home. Five years later, the first study by the UCLA Internet Project found that home access had increased to 46.9 percent of respondents. Home access increased to 58.4 percent in 2001, and 59.3 percent in 2002.



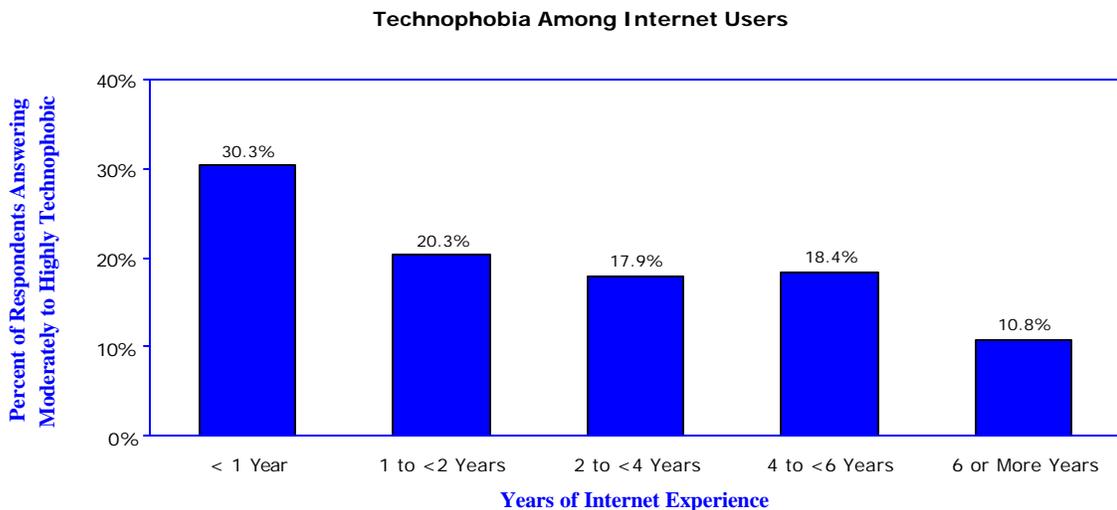
### HOW WOULD YOU RATE YOUR ABILITY TO USE THE INTERNET?

Users continue to rate highly their ability to use the Internet. In 2002, 63.1 percent of users ranked their Internet abilities as good or excellent, compared to 65.5 percent in 2001 and 44.6 percent in 2000.



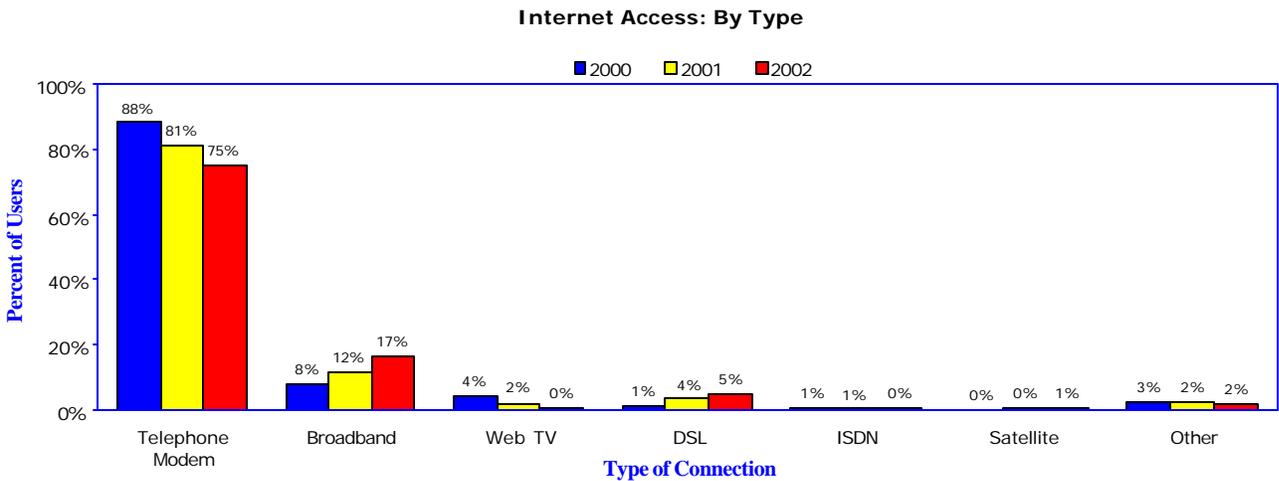
### TECHNOPHOBIA: DO INTERNET USERS SUFFER FROM IT?

Technophobia – feeling discomfort about computers or any computerized technology – is a phenomenon that affects respondents at all levels of experience using the Internet. Technophobia is most common among new Internet users – with 30.3 percent in 2002 reporting that they are moderately to highly technophobic. Yet 10.8 percent of very experienced users also report moderate or high levels of technophobia.



### HOW DO YOU CONNECT TO THE INTERNET AT HOME?

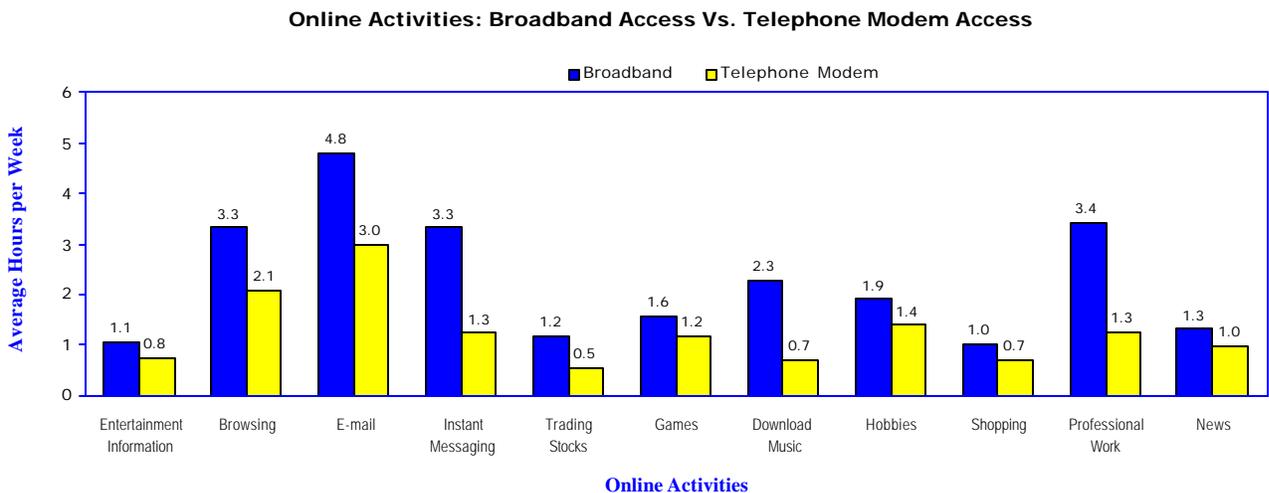
Most households with Internet access still connect to online service with a telephone modem; however, modem access has declined steadily during the three years of the UCLA Internet Project. Access by cable and DSL are growing steadily, while Web TV access is declining.



### BROADBAND VS. MODEM: HOW DO THEY AFFECT ONLINE USE?

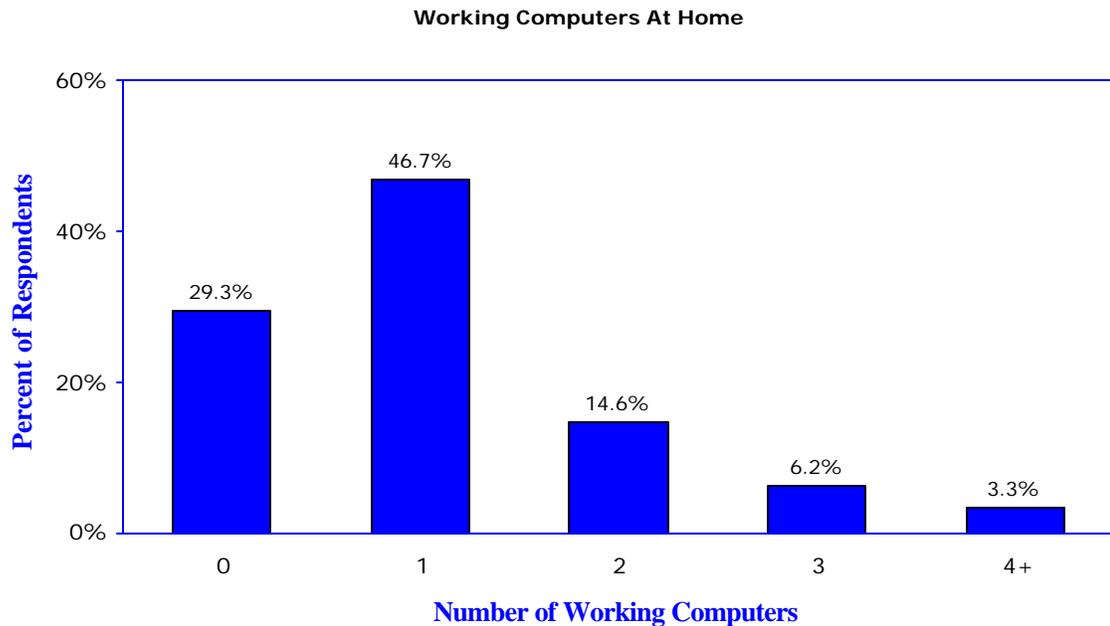
How does broadband use affect various online activities? The 2002 UCLA Internet Project compared the time spent on major online activities by broadband users and telephone modem users.

Broadband users spent more time online than modem users in all of the most popular Internet activities.



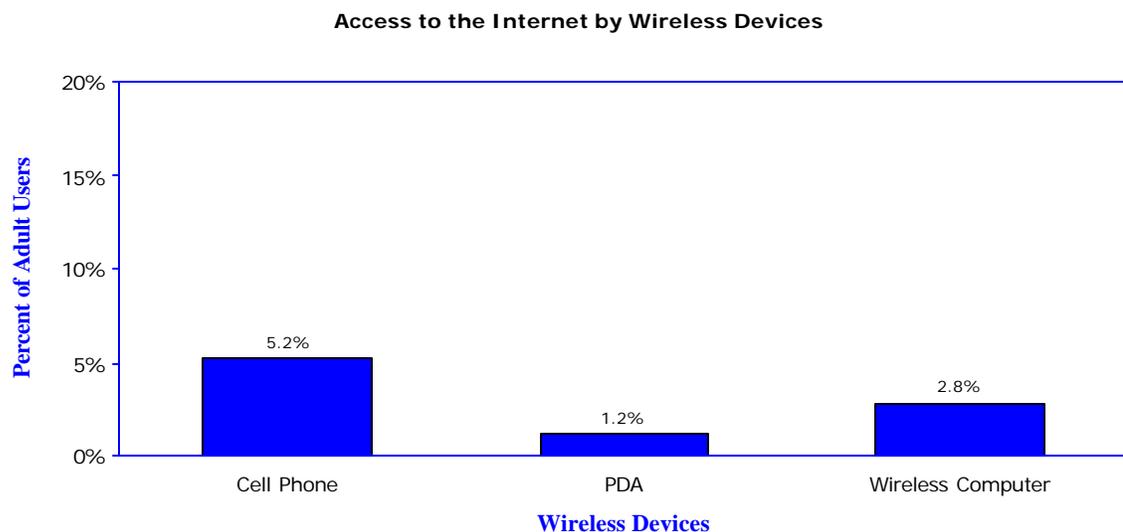
## HOW MANY WORKING COMPUTERS AT HOME?

Almost one-quarter of respondents (24.1 percent) have more than one working computer in their homes. Nearly 10 percent (9.5 percent) have three or more working computers.



## INTERNET ACCESS AND WIRELESS DEVICES

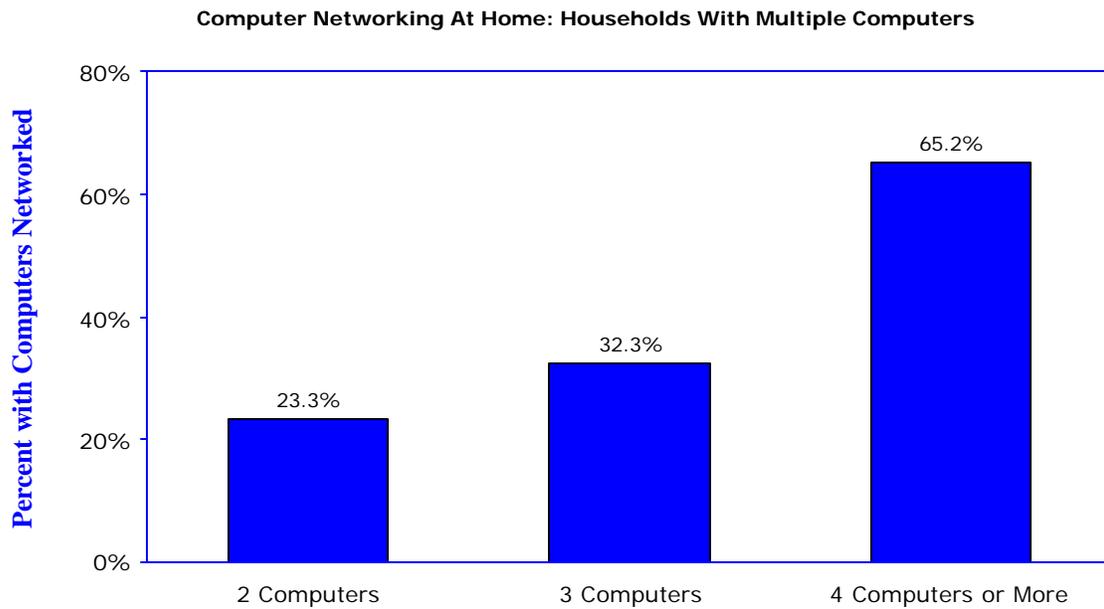
A new question in the UCLA Internet Project for 2002 asked respondents about their access to the Internet via wireless devices. About nine percent of respondents (9.2 percent) report access to the Internet through a wireless device, including cell phones and PDAs.



### ARE YOUR COMPUTERS AT HOME NETWORKED TO EACH OTHER?

Home networking of computers is a growing trend. A new question in the UCLA Internet Project found that 32.3 percent of respondents with two or more computers at home have networked them.

Notably, nearly two-thirds (65.2 percent) of home computer users who have four or more machines at home have networked them together.



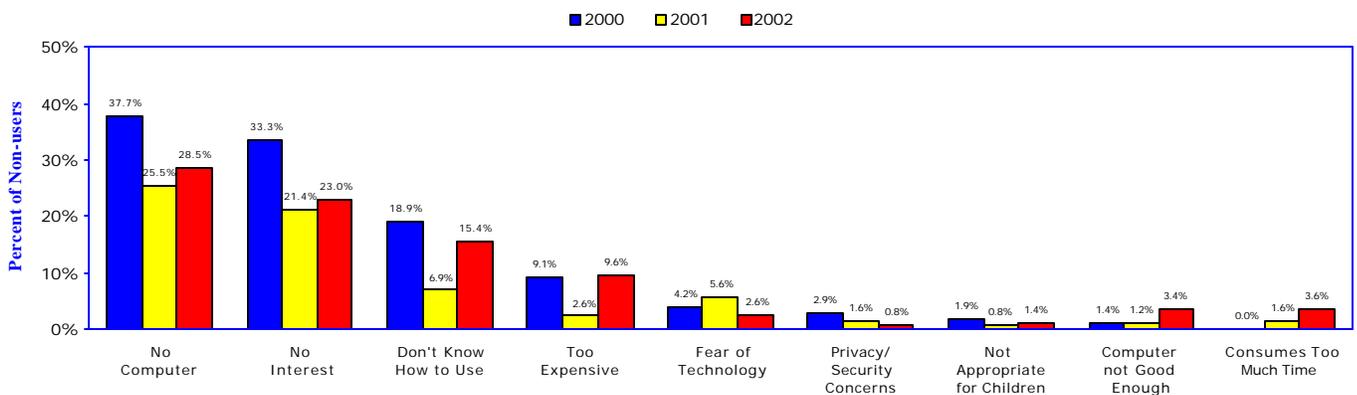
### NON-USERS: WHY NOT ONLINE?

The 28.9 percent of Americans who did not use the Internet in 2002 expressed a range of reasons for not being online. As in 2001 and 2000, the primary reason was lack of technology; 31.9 percent of non-users said they do not have a computer or their current computer is not adequate.

Lack of interest in the Internet continues to be the second most cited issue.

Two other relatively frequent responses for 2002 were “I don’t know how to use the Internet” and “too expensive.” A wide variety of other less-frequently cited responses include fear of technology, concerns about privacy and security, and worries about appropriateness of the Internet for children.

**Internet Non-Users: Reasons For Not Going Online**

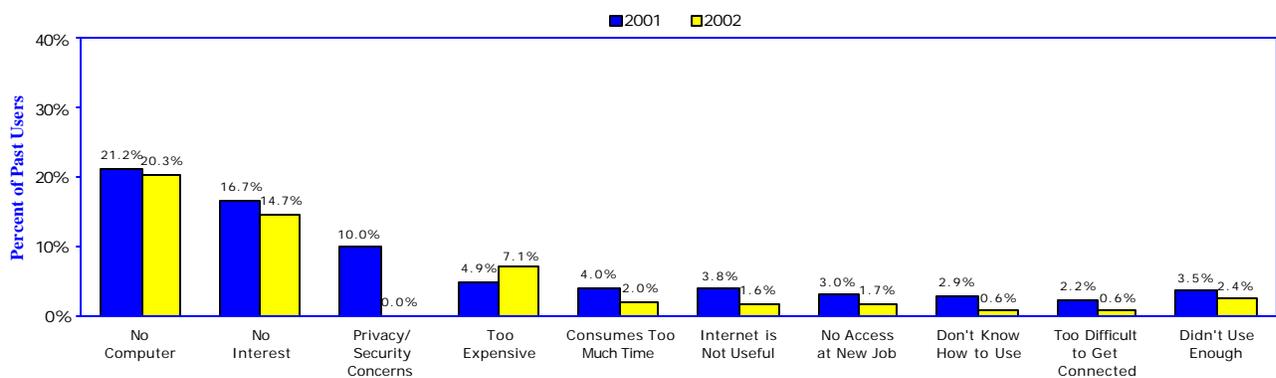


### ELECTRONIC DROPOUTS: WHY?

“Electronic dropouts” – Internet non-users who were once users – report many 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: “no interest,” “privacy concerns,” and “too expensive.”

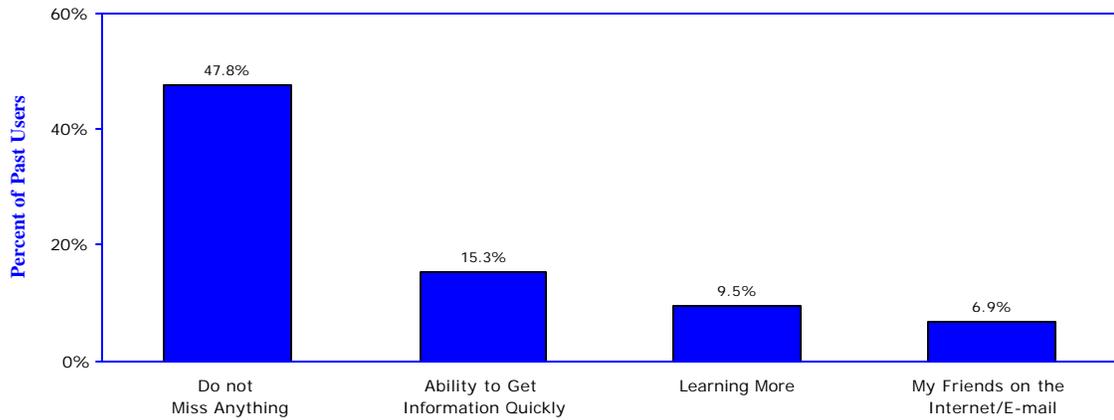
**Electronic Dropouts: Reasons Why Former Internet Users No Longer Go Online**



### WHAT DO YOU MISS ABOUT NOT USING THE INTERNET?

Electronic dropouts report that the feature about the Internet they miss the most is the ability to get information quickly. Yet nearly half of electronic dropouts say they do not miss anything by not having access to the Internet.

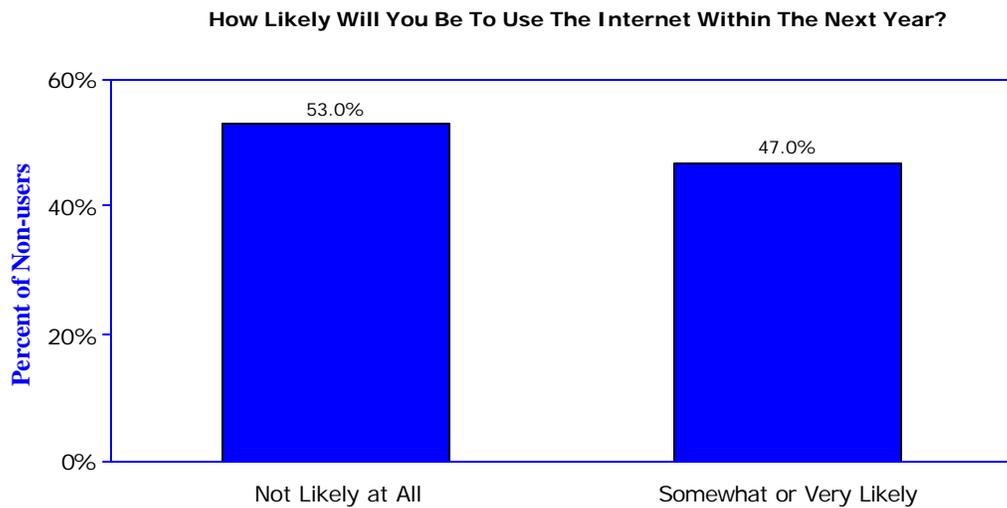
Internet Features Missed By Former Users



### NON-USERS: WILL YOU LOG ON SOON?

Will Internet non-users in 2002 become users in 2003? The number of non-users who say they are somewhat likely or very likely to go online within the next year continues to grow – although only slightly – across the three years of the UCLA Internet Project.

Of the 28.9 percent of respondents who do not currently use the Internet, 47 percent in 2002 said they are somewhat likely or very likely to go online next year – up from 44.4 percent in 2001 and 41.4 percent in 2000.



However, more than half (53.0 percent) of non-users in 2002 continued to say they are not likely to access the Internet in the next year.

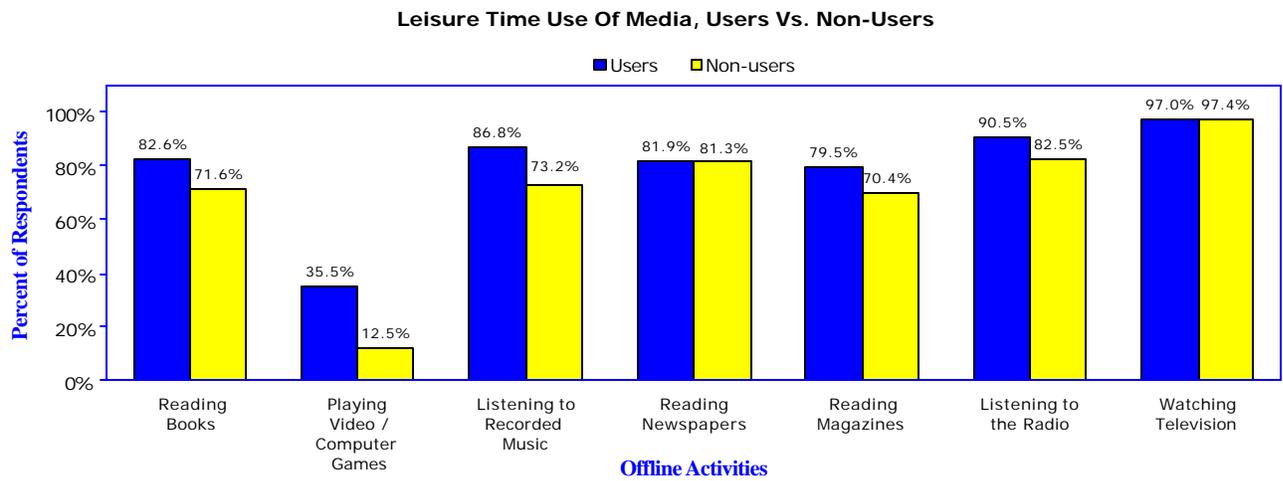
## **MEDIA USE AND TRUST**

In 2002, did hours spent on the Internet replace the use of other media? Is leisure time affected by going online? Are television viewing habits changing because of the Internet? Is the Internet valued as a source of information?

Do Internet users trust what they find online?

**USE OF MEDIA**

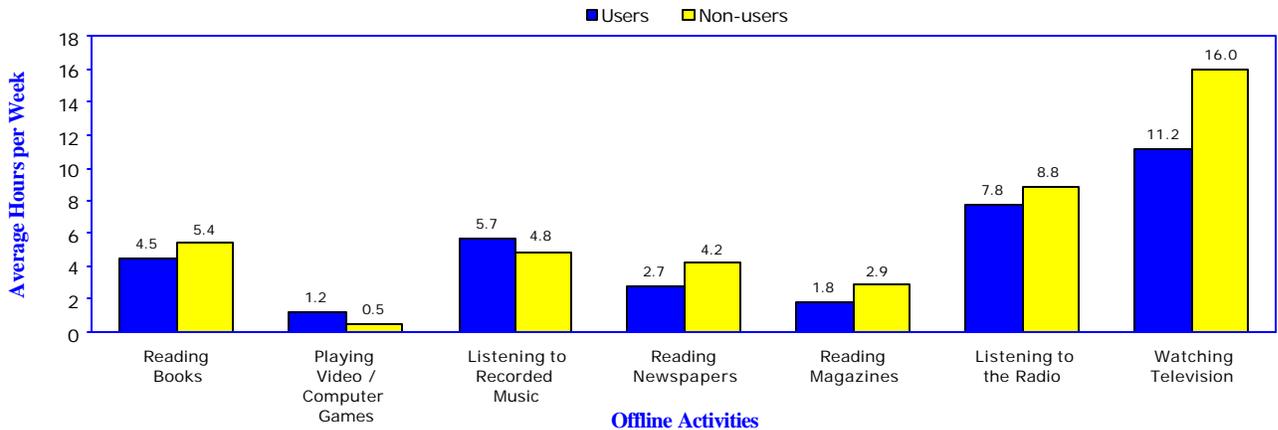
As in the 2000 and 2001 studies by the UCLA Internet Project, in 2002 generally higher percentages of Internet users than non-users employed several types of media in their leisure time – the exceptions are reading newspapers and watching television, which are used by roughly equal numbers.



**TELEVISION: VIEWING CONTINUES TO DECLINE AMONG INTERNET USERS**

While both users and non-users in almost equal numbers acknowledge that they watch television, the biggest gap in media use between users and non-users in both 2002 and 2001 was the amount of television viewing time – and the gap is growing.

**Leisure Activities: Weekly Hours, Users And Non-Users**

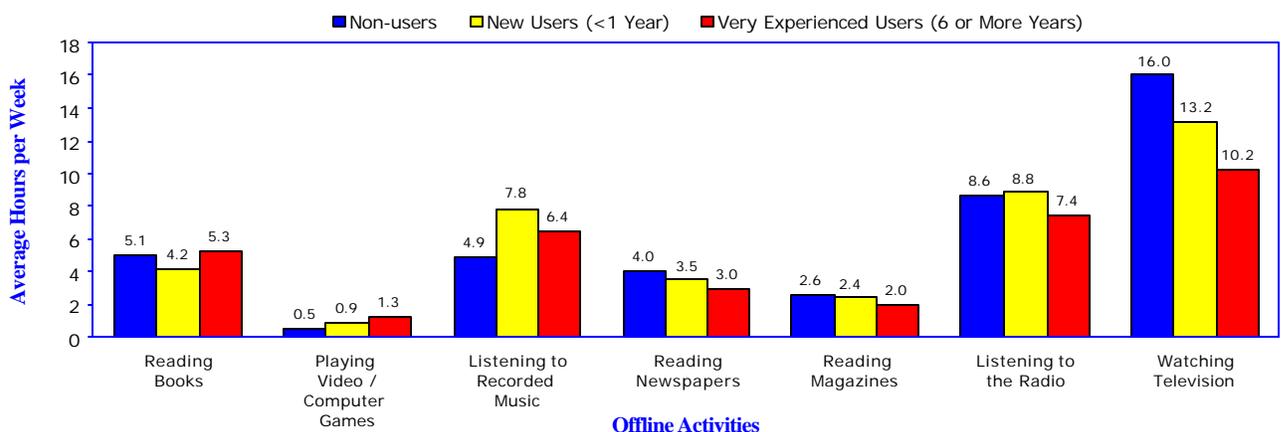


Overall, Internet users watched less television in 2002 than in 2001; 11.2 hours per week in 2002, compared to 12.3 hours in 2001. In 2002, Internet users watched about 4.8 hours of television less per week than non-users – this compared to 4.5 hours in 2001.

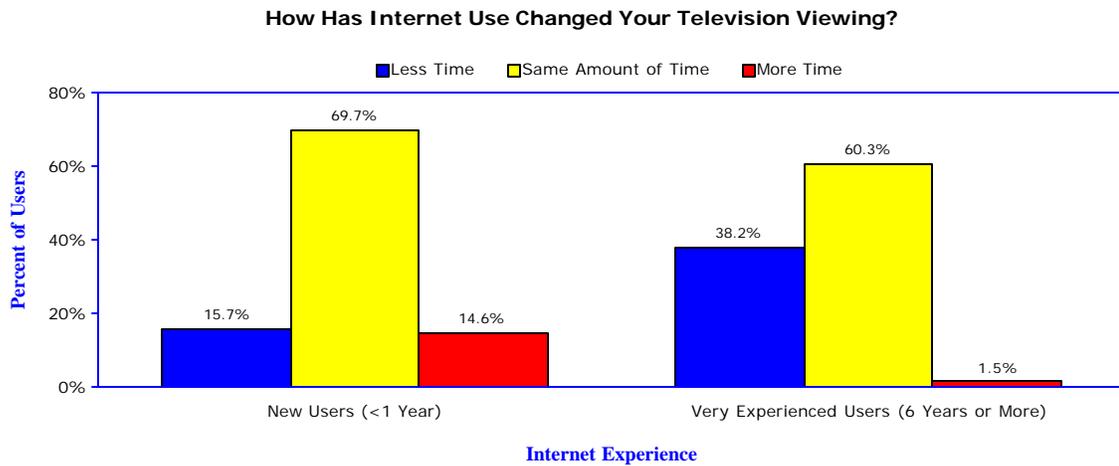
Differences in television viewing become even more pronounced as Internet experience increases.

Comparing time spent with various types of media by Internet non-users, new Internet users, and very experienced users, most usage varies by only about an hour or less per week. Yet when comparing non-users to very experienced users, television viewing drops 5.8 hours per week.

**Leisure Activities: Weekly Hours, By Internet Experience**



The trend throughout the three years of the UCLA Internet Project shows that Internet users may be “buying” their time to go online from hours previously spent viewing television. More than twice as many of the very experienced users than new users say that they spend less time watching television since using the Internet.



Just as radio was the victim when television evolved in the early 1950s, now television is becoming the casualty of increasing Internet use. Continuing to monitor the social implications of declining television viewing as the Internet evolves will be a primary objective of the UCLA Internet Project.

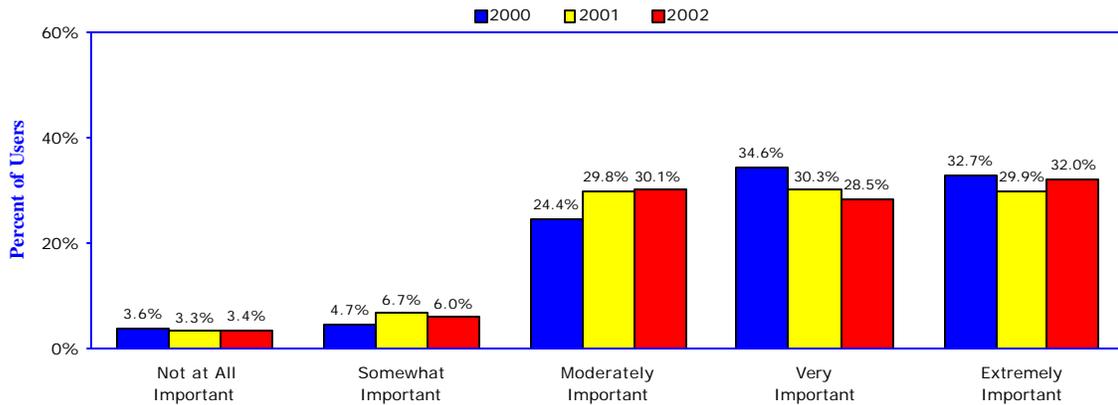
For other questions that explore declining television use, see pages 64, 66, and 67.

### THE INTERNET: AN IMPORTANT SOURCE OF INFORMATION?

One of the most revealing questions in the UCLA Internet Project explores how users view the Internet as a source of information and entertainment. In less than eight years as a publicly available communication tool, the Internet is viewed as an important source of information by the vast majority of people who use the online technology.

The Internet ranks high among users as an important source of information. In 2002, 60.5 percent of all users considered the Internet to be a very important or extremely important source of information, virtually the same as the 60.2 percent reported in 2001, but down from 67.3 percent in 2000. Add those who said the Internet is a moderately important source of information, and the total increases to 90.6 percent for 2002, about the same as the 90 percent reported in 2001, but down from 91.7 percent in 2000.

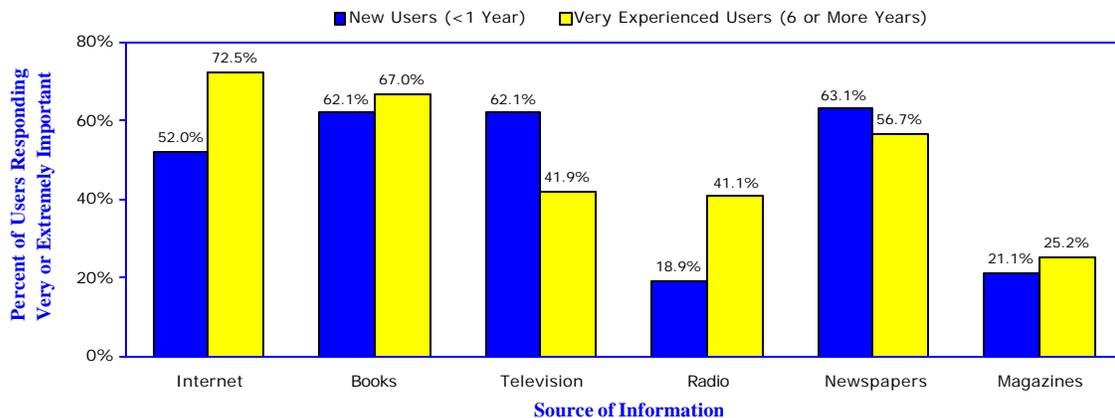
The Internet: Importance As An Information Source



Even new users believe that the Internet is an important source of information; 52 percent of new users said the Internet is a very important or extremely important source of information – up from 45.1 percent of new users in 2001.

Among very experienced users, the Internet ranks higher than books, television, radio, newspapers, and magazines as an important source of information.

Sources Of Information: Very Important Or Extremely Important

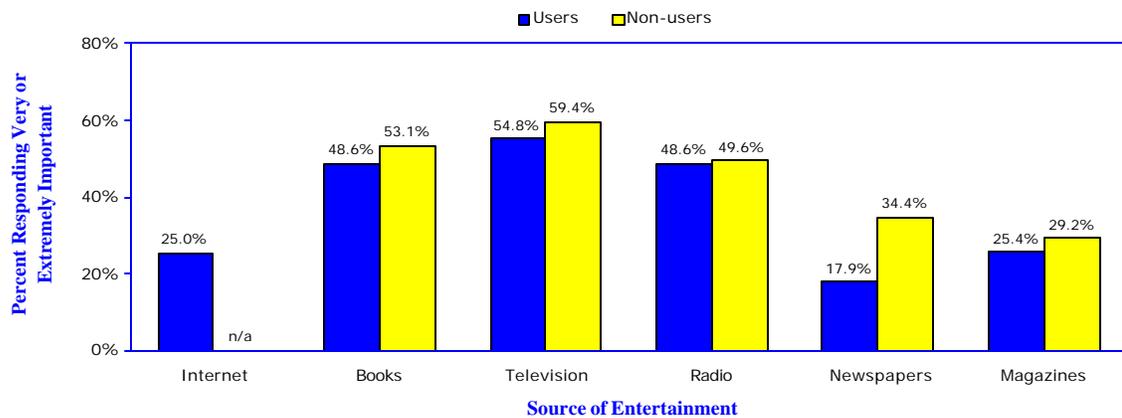


### THE INTERNET: AN IMPORTANT SOURCE OF ENTERTAINMENT?

While most users believe the Internet is an important source of information, fewer perceive online content as an important source of entertainment.

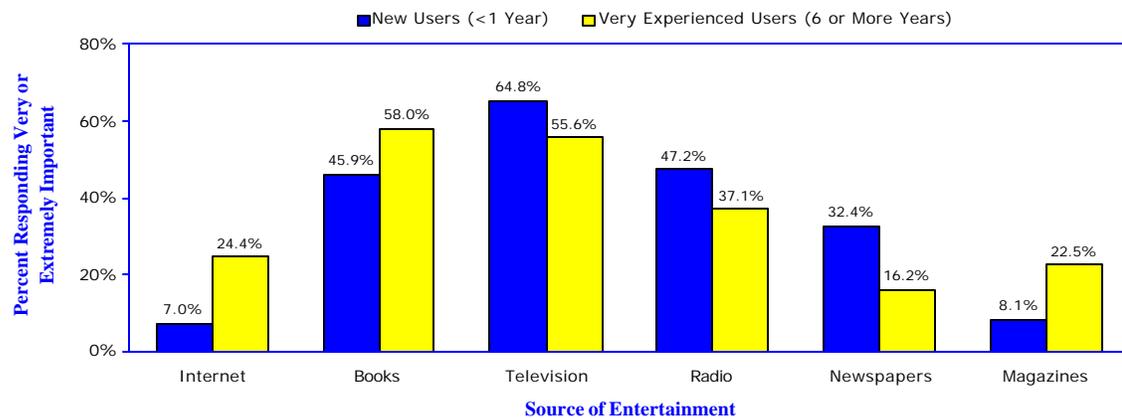
In 2002, 25 percent of users said that the Internet is a very important or extremely important source of entertainment, up from 21.1 percent in 2001, and about the same as in 2000 (24.9 percent).

**The Internet – Importance As An Entertainment Source:  
Very Important Or Extremely Important**



The importance of the Internet as an entertainment source grows as experience online increases. More than triple the number of very experienced users than new users consider the Internet a very important or extremely important source of entertainment.

**The Internet – Importance As An Entertainment Source By Online Experience:  
Very Important Or Extremely Important**

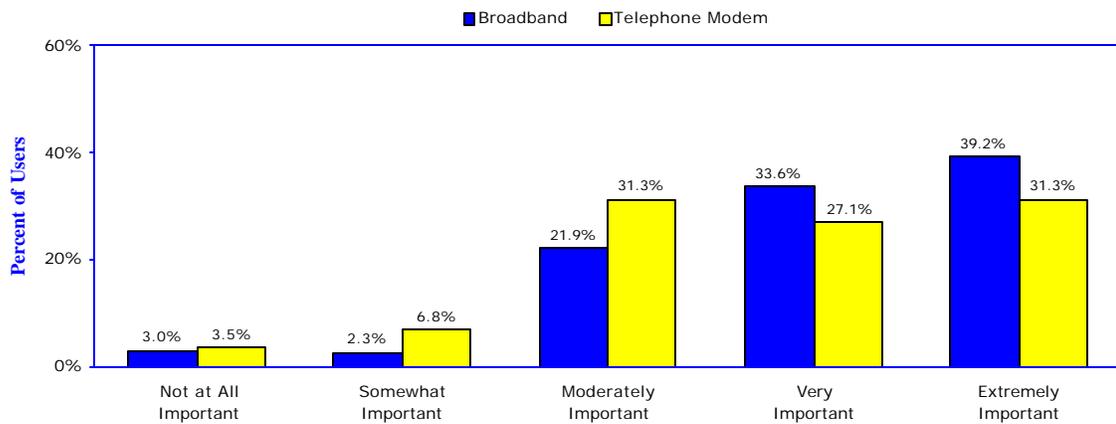


**THE INTERNET’S IMPORTANCE: BROADBAND VS. TELEPHONE MODEM USERS**

The importance of the Internet as a source of both information and entertainment is higher among those who access the Internet via broadband than those with telephone modem.

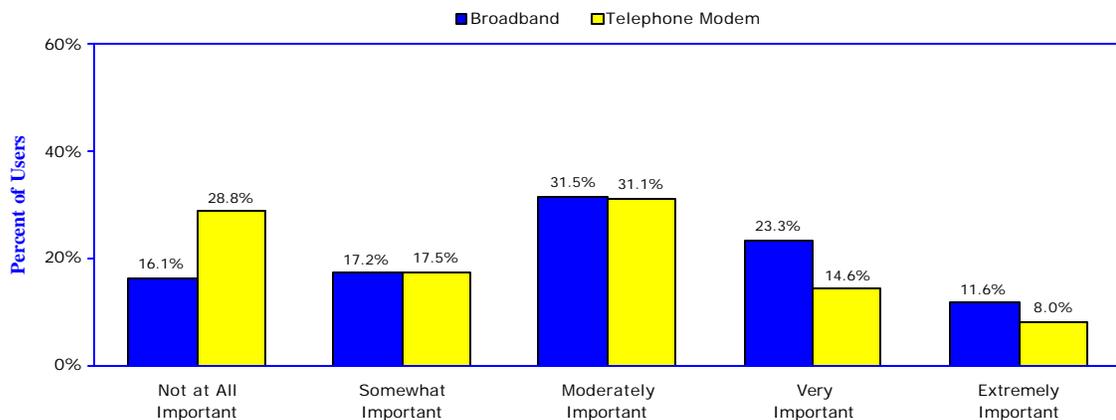
Nearly three-quarters (72.8 percent) of broadband Internet users consider the Internet a very important or extremely important source of information, compared to 58.4 percent of those who access the Internet by telephone modem.

**The Internet – Importance As An Information Source:  
Broadband Vs. Telephone Modem**



The number of users who say the Internet is an important entertainment source is smaller than those who believe it is an important information source, but yet again, more broadband users than telephone modem users think the Internet is a very important or extremely important source of entertainment.

**The Internet – Importance As An Entertainment Source:  
Broadband Vs. Telephone Modem**

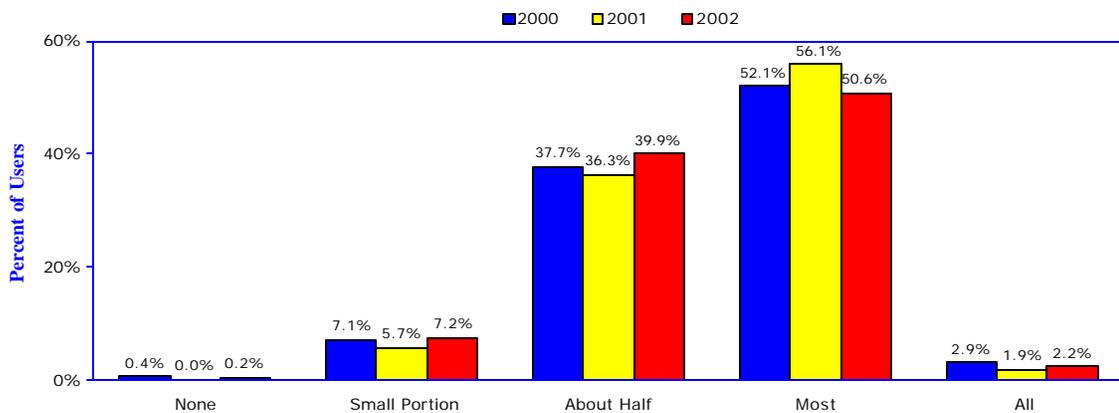


### INFORMATION ON THE INTERNET: IS IT RELIABLE AND ACCURATE?

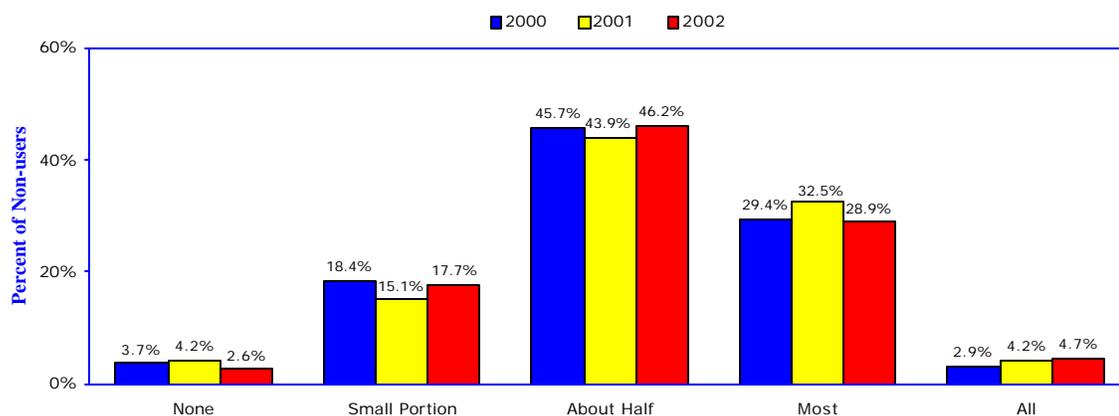
The number of users who believe that information on the Internet is reliable and accurate continued to decline in 2002.

In 2002, 52.8% of users believed that most or all of the information online is reliable and accurate – a decline from 58 percent in 2001 and 55 percent in 2000. Non-users reported much lower levels of belief in the reliability and accuracy of the information on the Internet.

**How Much Of The Information On the Internet Do You Think is Reliable and Accurate? (Users)**



**How Much Of the Information On the Internet Do You Think is Reliable and Accurate? (Non-Users)**



More than one-third of users (39.9 percent) in 2002 continued to say that only about half of the information on the Internet is reliable and accurate – a finding that has remained generally consistent throughout the three years of the UCLA Internet Project. Among non-users, one-fifth (20.3 percent) said that none or a small portion of information online is reliable and accurate.

# CONSUMER BEHAVIOR

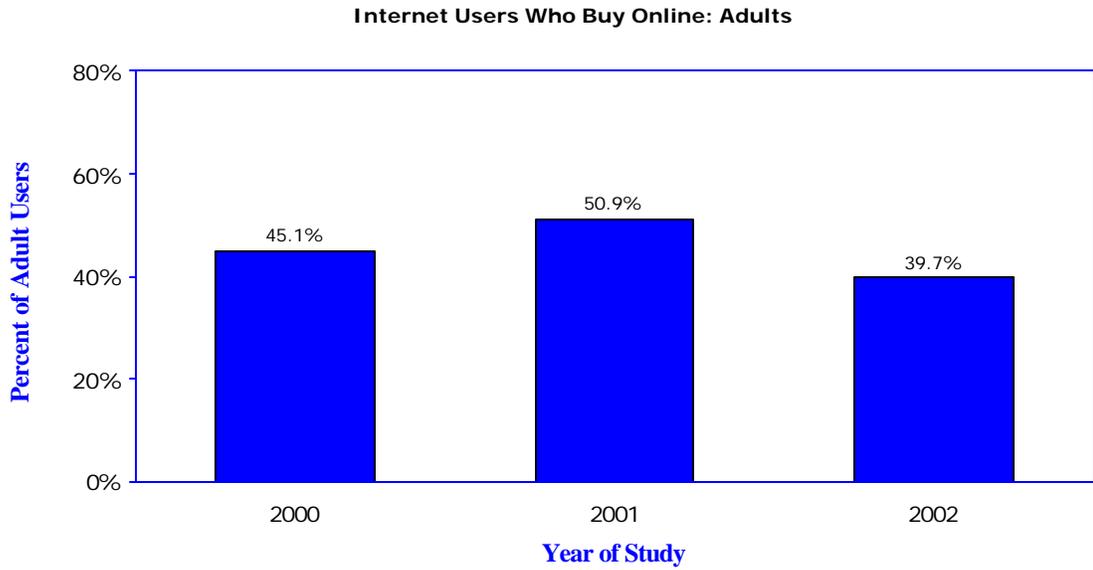
In 2002, did the demise of many high-profile dot-coms and the lingering recession created changes in consumer behavior online? Did Internet users continue to find differences between buying online and shopping at traditional retail stores? Have economic uncertainty and global insecurity affected consumer behavior?

How then do these changes affect consumer behavior while on the Internet?

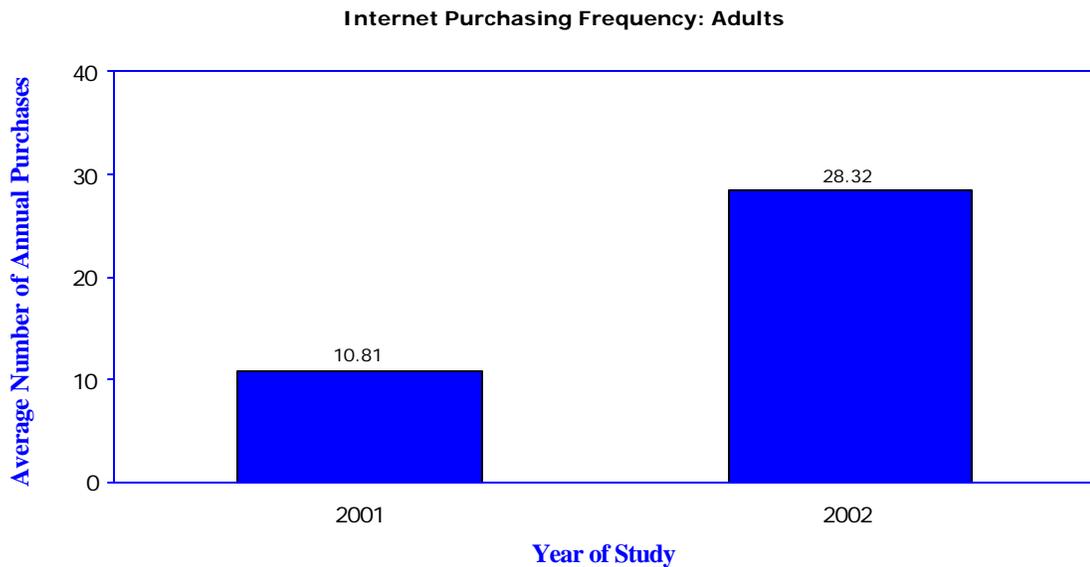
**INTERNET PURCHASING: DO YOU BUY ONLINE? HOW MUCH? HOW OFTEN?**

The UCLA Internet Project identified several key findings about purchasing online in 2002:

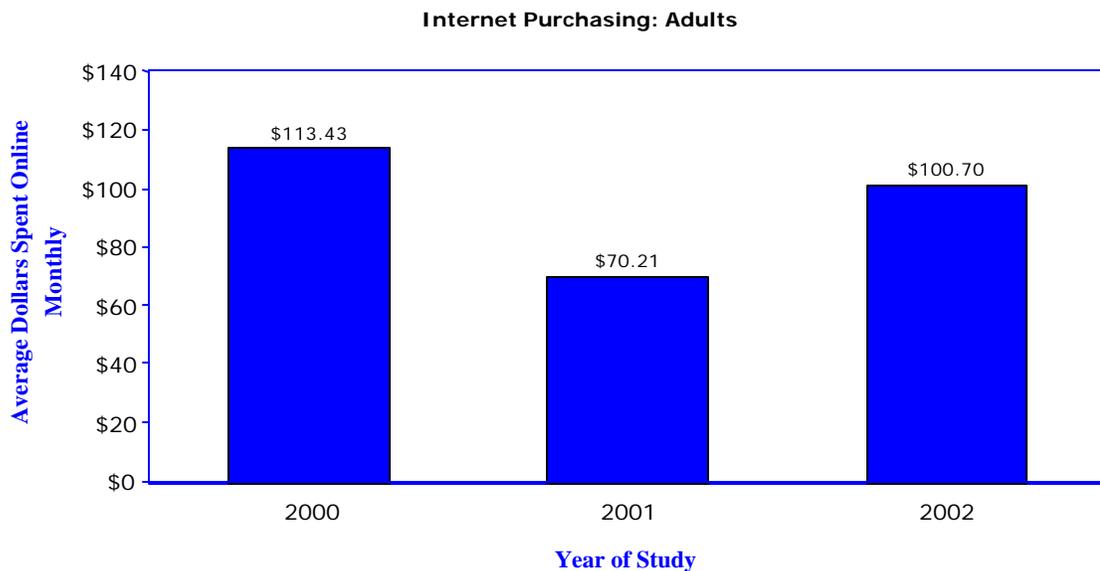
- Fewer adults bought online in 2002 than in either 2001 or 2000.



- While the overall number of adult buyers in 2002 declined, their number of purchases increased substantially over 2001.



- The average dollars spent online by adult buyers in 2002 also increased substantially over 2001, but is still lower than 2000.



These findings suggest that Internet buyers are making more purchases, but they are spending less per purchase.

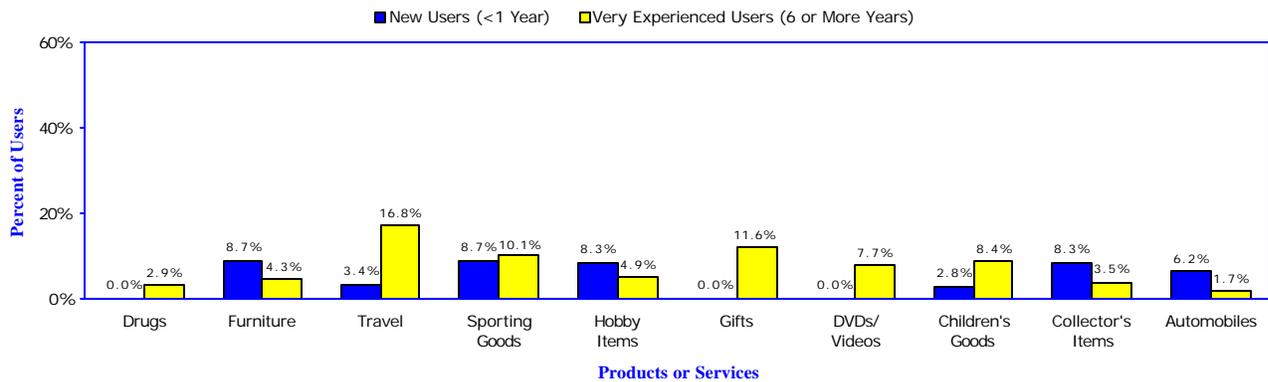
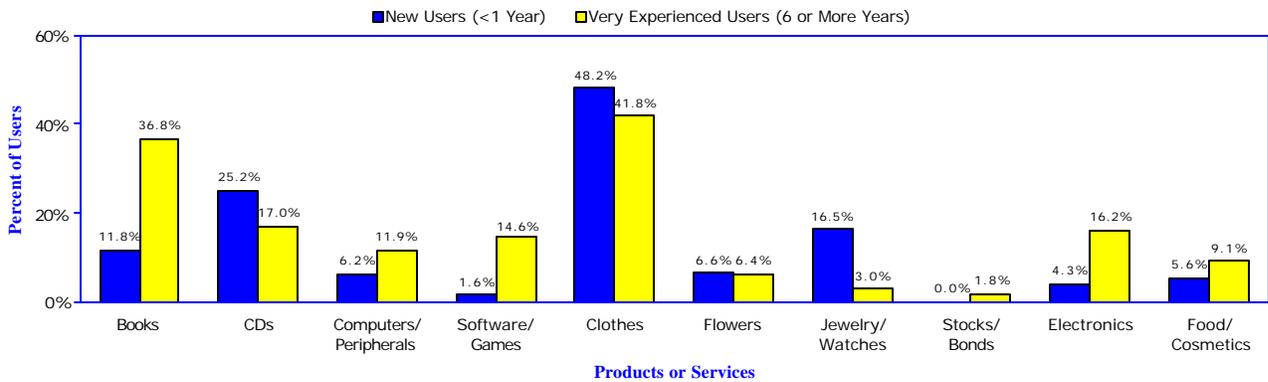
### WHAT DO YOU BUY ONLINE?

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

In 2002, by far the biggest difference in purchasing habits was the percentage of very experienced users who bought books online, compared to new users. Very experienced users also bought more computer equipment, software, electronics, food and cosmetics, travel arrangements, sporting goods, gifts, videos or DVDs, and children’s goods.

New users are more likely to purchase CDs, clothes, jewelry or watches, hobby items, collector’s items, furniture, and automobiles.

**Types Of Products Purchased Online: New Users Vs. Very Experienced Users**

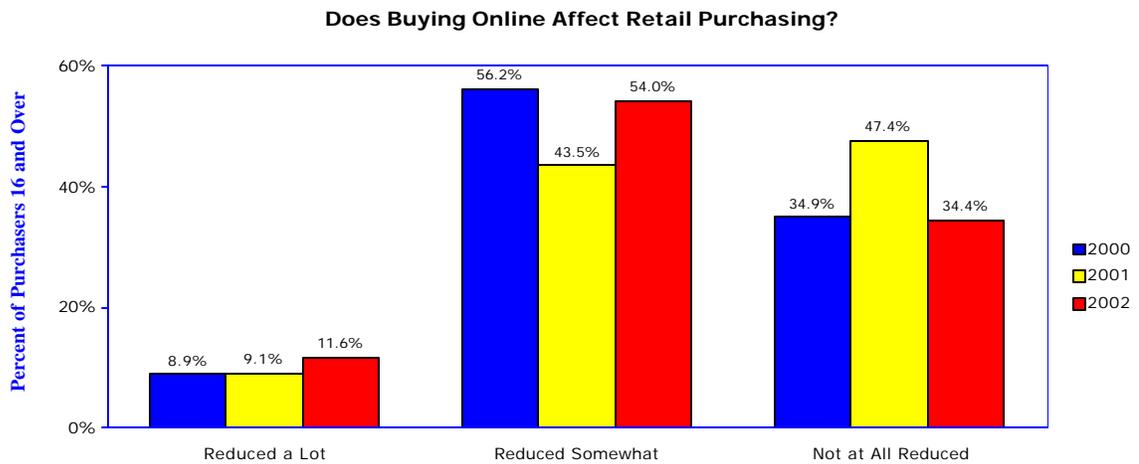


### INTERNET PURCHASING: DOES IT AFFECT BUYING IN RETAIL STORES?

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

In 2002, online buying replaced some purchasing in retail stores for many Internet users, and at higher levels than in 2001.

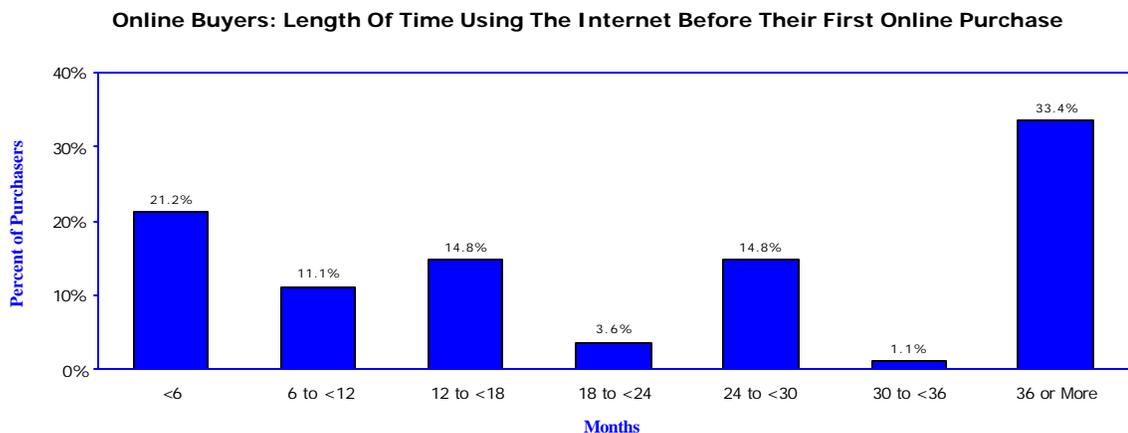
Nearly two-thirds of Internet purchasers in 2002 (65.6 percent) said that online purchasing has reduced their purchasing in retail stores either somewhat or a lot – up from 52.6 percent in 2001 and consistent with 65.1 percent in 2000. However, the number of online buyers who said their retail purchasing was reduced a lot has stayed generally the same in all three years of the UCLA Internet Project.



### HOW LONG BEFORE YOUR FIRST ONLINE PURCHASE?

Many Internet purchasers say they waited months or years before buying online.

Almost half of Internet buyers (49.3 percent) in 2002 waited more than two years after going online before making their first purchase. One-third waited more than three years.

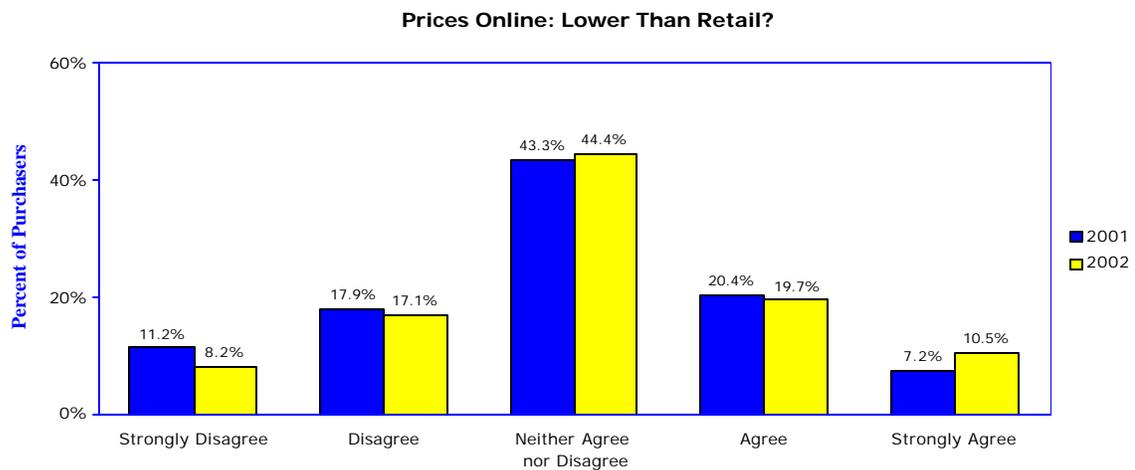


### ARE PRICES ONLINE LOWER THAN TRADITIONAL RETAIL?

Even though Internet purchasing continues to flourish, online purchasers still do not generally consider the Internet a hunting ground for bargains. However, the number of buyers who think there are bargains on the Internet is growing slightly.

When asked if, “the prices on the Internet, including shipping, are lower than those found in local retail establishments,” 30.2 percent of online buyers in 2002 either agreed or strongly agreed, up from 27.6 percent in 2001.

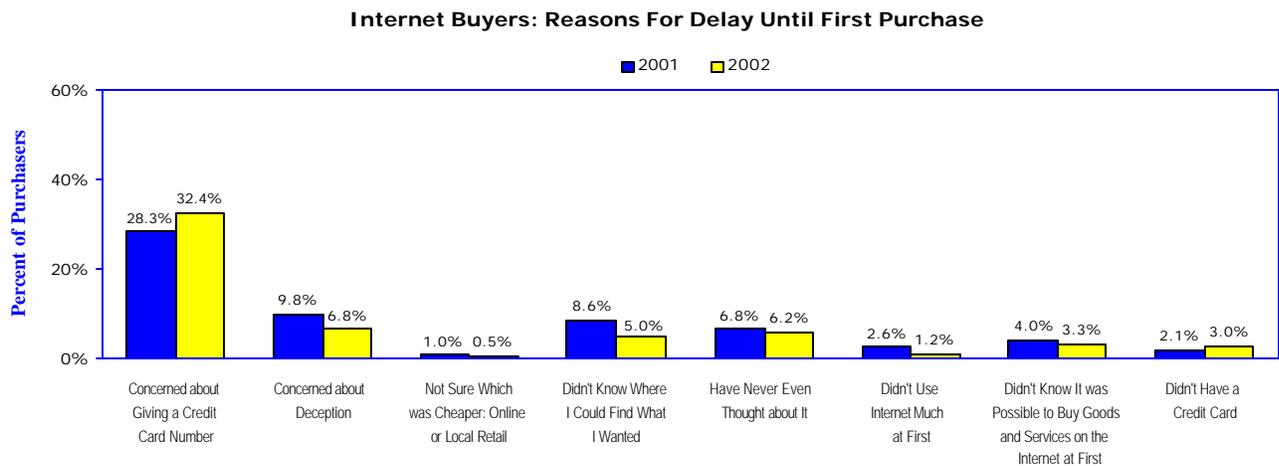
Nevertheless, a quarter of 2002 buyers (25.3 percent) disagree or strongly disagree that online prices are lower than retail, but the number has declined from 29.1 percent in 2001.



### WHY WAIT TO MAKE THE FIRST PURCHASE?

Why do some users wait after beginning to use the Internet before their first online purchase? In both 2002 and 2001, concern about using a credit card online far outweighed any other reason.

For other questions about using credit cards online, see pages 50-52.

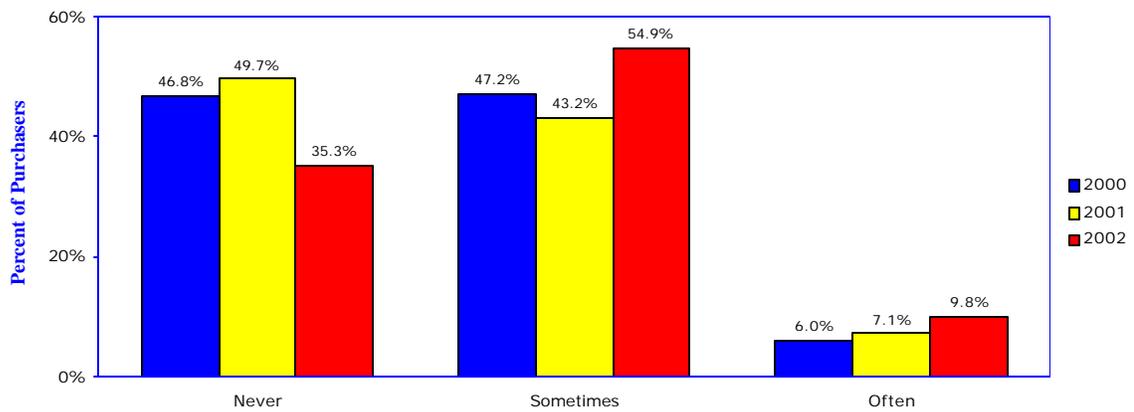


**SHOPPING IN STORES, THEN BUYING ONLINE ;  
SHOPPING ONLINE, THEN BUYING IN STORES**

Internet purchasers use online sources and retail stores for both browsing and purchasing; the number of online purchasers who said they shop in local stores and later buy online increased from 2001 to 2002. And, the number of Internet purchasers who shop online and then buy in retail stores also increased from 2001 to 2002.

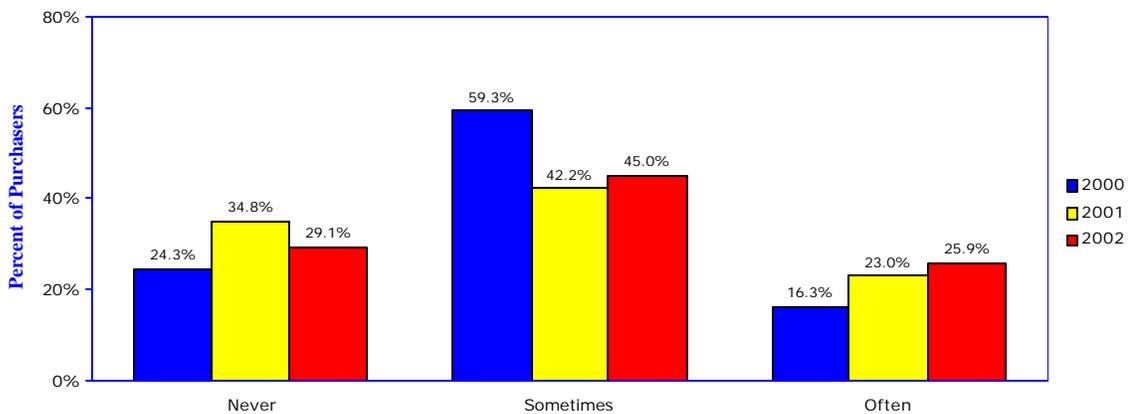
In 2002, 64.7 percent of Internet purchasers said they sometimes or often browse in traditional retail locations and then buy online – up from 50.3 percent in 2001 and 53.2 percent in 2000.

**Internet Buyers Who Shop In Stores, Then Buy Online**



Also, 70.9 percent of 2002 Internet buyers said they sometimes or often look online for products and then buy in stores – an increase from 65.2 percent in 2001, but lower than the 75.6 percent reported in 2000.

**Internet Buyers Who Shop Online, Then Buy In Stores**

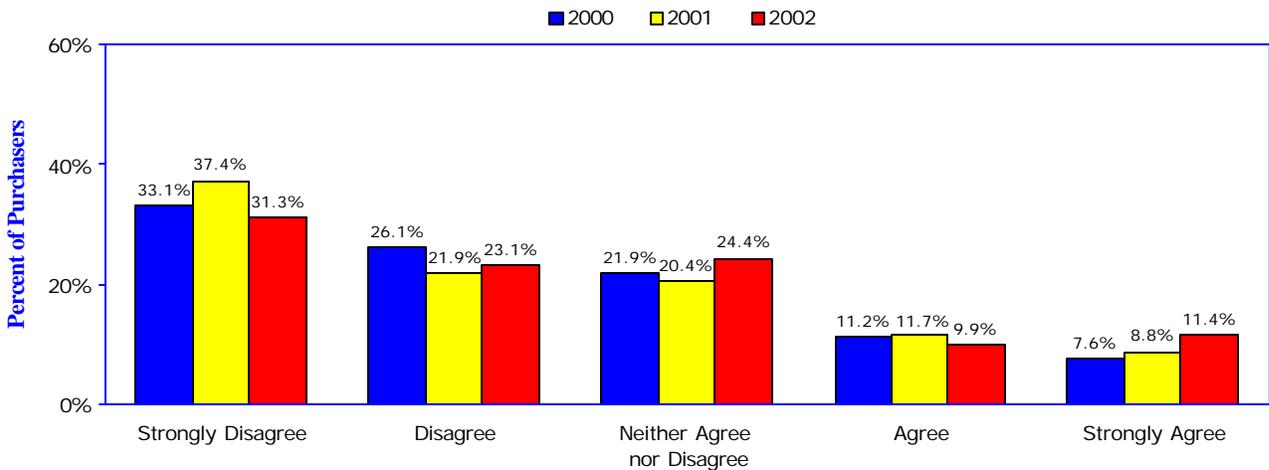


**DO USERS SPEND MORE THAN THEY INTEND?**

All three surveys by the UCLA Internet Project confirm that most Internet users do not think they overspend when shopping online.

In 2002, only 21.3 percent of Internet buyers agreed or strongly agreed that they spend more than they intended when shopping online – up slightly from 20.5 percent in 2001 and 18.8 percent in 2000.

**Do You Spend More Than You Intend When You Shop Online?**

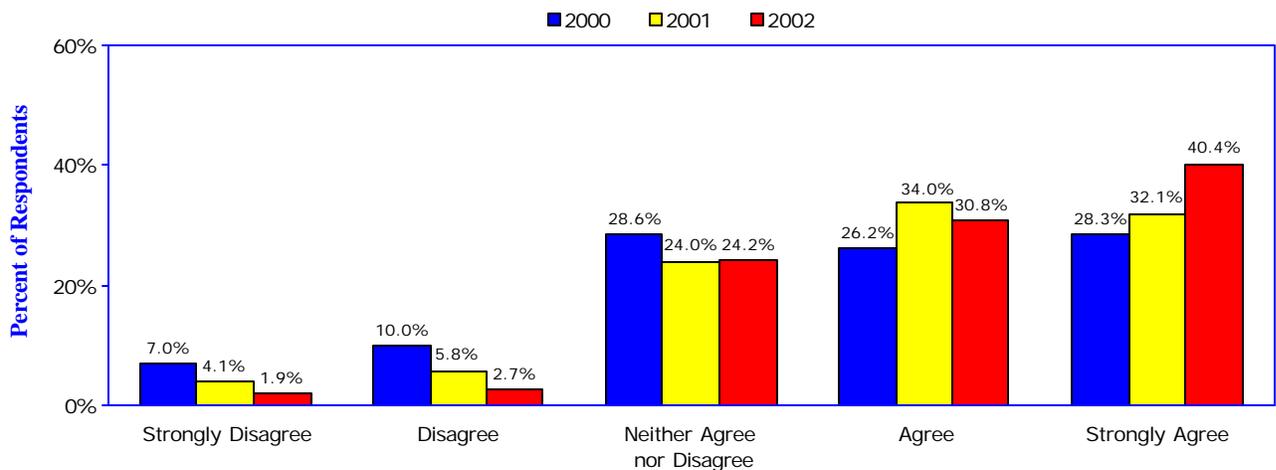


**ONLINE PURCHASING: WILL IT INCREASE?**

Respondents in 2002 reported that their online buying is likely to increase.

When asked if they will probably make more purchases online, 71.2 percent of 2002 respondents agreed or strongly agreed, compared to 66.1 percent in 2001 and 54.5 percent in 2000.

**Are You Likely to Increase Your Online Purchasing?**

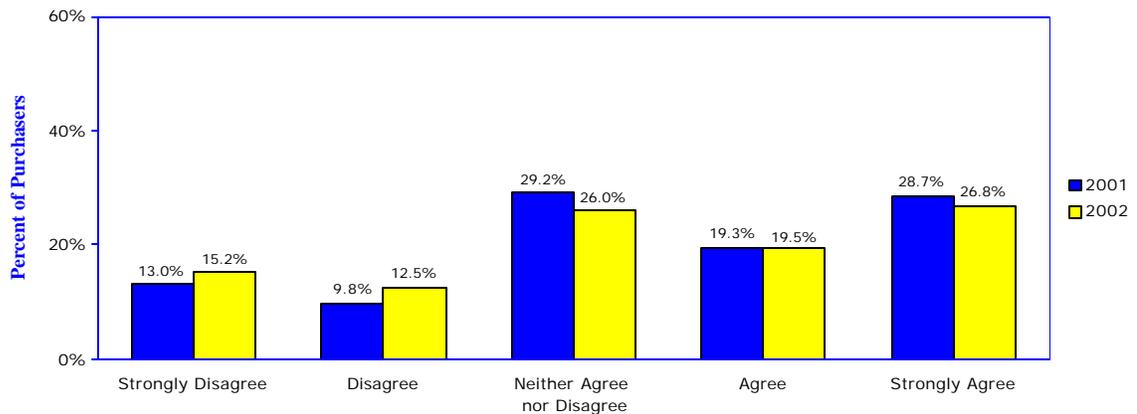


**SALES TAX: WOULD IT AFFECT ONLINE PURCHASING?**

Would increased application of state sales taxes change online purchasing habits? Nearly half of online buyers say yes.

When asked, “If sales tax was charged for online purchases, I would probably buy less on the Internet,” 46.3 percent of Internet buyers in 2002 agreed or strongly agreed, while 48 percent of buyers in 2001 agreed or strongly agreed.

**Will An Added Sales Tax Reduce Your Online Purchasing?**

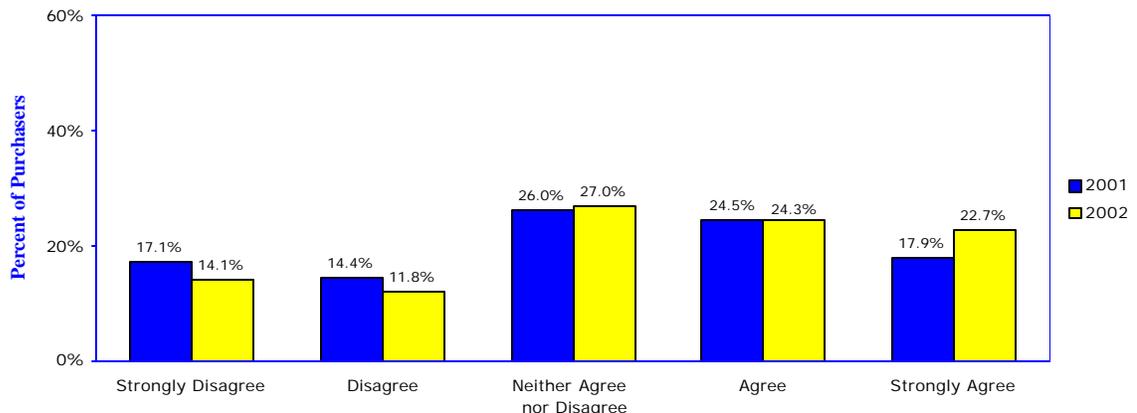


**FREE ONLINE SERVICES: WILL INTERNET USERS PAY FOR THEM?**

Growing numbers of Internet users say they would be willing to pay for an online service that is currently free.

When Internet buyers in 2002 were asked if they would be willing to pay a reasonable price for a free online service if it became a pay service, 47.0 percent agreed or strongly agreed, compared to 42.4 percent in 2001.

**Would You Pay For A Free Online Service If It Becomes A Pay Service?**



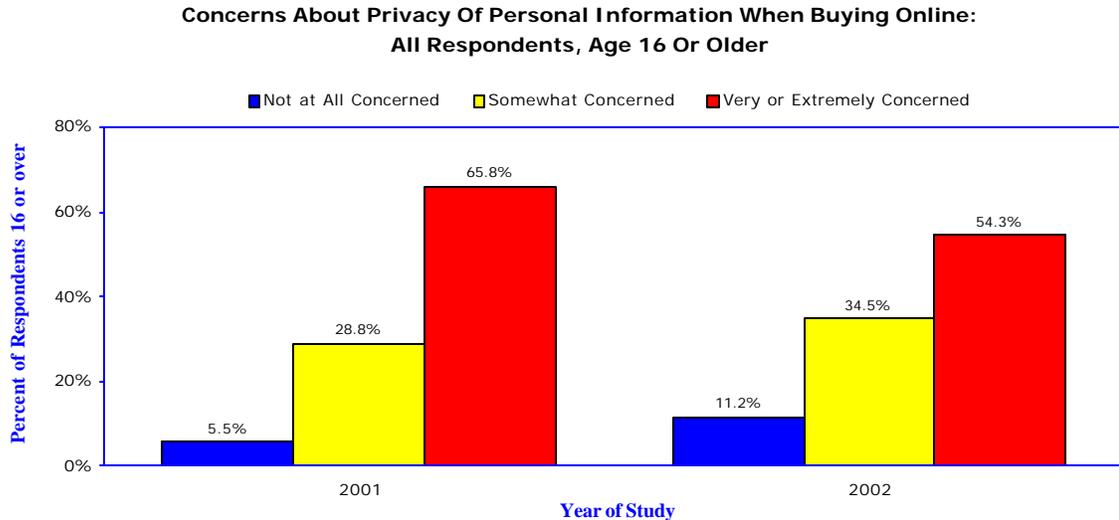
## ARE YOU CONCERNED ABOUT YOUR PRIVACY WHEN BUYING ONLINE?

In one of several questions in the UCLA Internet Project that explore the issues of privacy and security online in 2002, most respondents continued to report some level of concern about the privacy of their personal information when or if they buy on the Internet. Yet overall concerns have declined slightly.

Overall, 88.8 percent of all respondents age 16 or over in 2002 expressed some concern about the privacy of their personal information when or if they buy on the Internet – down from 94.6 percent in 2001.

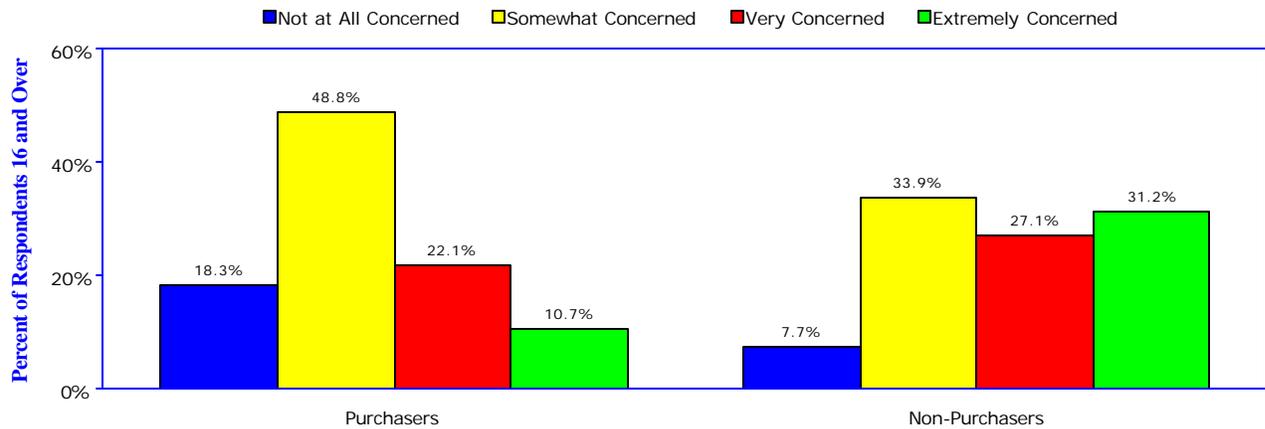
More specifically, 54.3 percent said they are very concerned or extremely concerned about the privacy of their personal information when buying online – a decline from 65.8 percent in 2001.

Overall, the number of respondents who are not concerned at all increased to 11.2 percent, more than double the number in 2001 (5.5 percent).



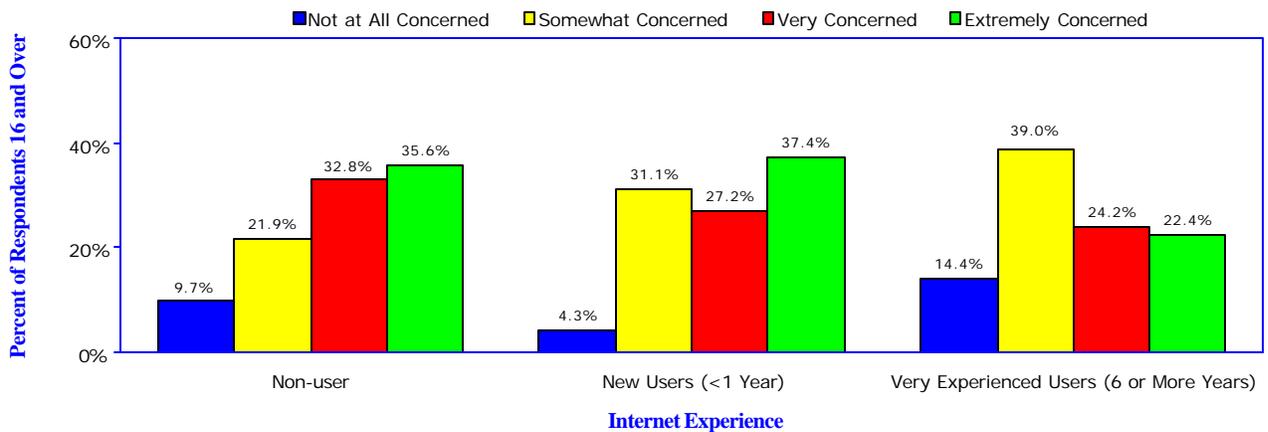
Comparing Internet purchasers to non-purchasers in 2002 shows much higher levels of non-purchasers than purchasers who are concerned about the privacy of their personal information when or if they buy online. Among purchasers, 32.8 percent are very concerned or extremely concerned, compared to more than half (58.3 percent) of non-purchasers.

**Concerns About Privacy Of Personal Information When Buying Online:  
Purchasers Vs. Non-Purchasers, Age 16 Or Older**



Comparing Internet non-users, new users, and the most experienced users shows that concerns about privacy of their personal information when or if they buy online decline as Internet use increases. Less than half of very experienced users are very concerned or extremely concerned about privacy of personal information when or if they buy online, compared to 64.6 percent of new users and 68.4 percent of non-users.

**Concerns About Privacy Of Personal Information When Buying Online:  
Non-Users, New Users, Very Experienced Users, Age 16 Or Older**

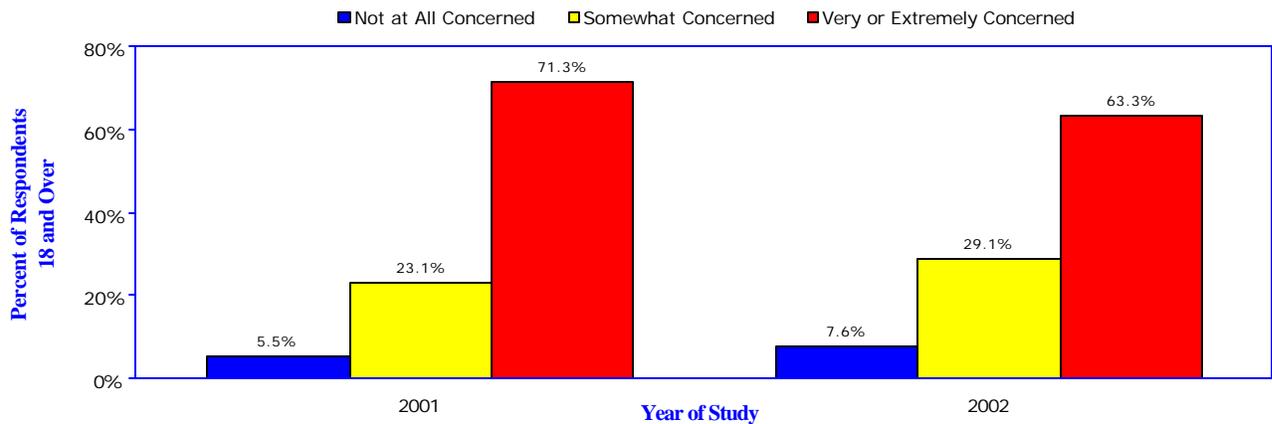


**CONCERNS ABOUT CREDIT CARD INFORMATION: A CONTINUING MAJOR PROBLEM**

While worries about personal privacy online may have declined in 2002, concerns about credit card security on the Internet remain as high as ever.

Overall, 92.4 percent of all respondents age 18 or over in 2002 expressed some concern about the security of their credit card information when or if they buy online – a statistically insignificant change from 94.4 percent in 2001.

**Concerns About Credit Card Security When Buying Online: All Respondents, 18 or older**

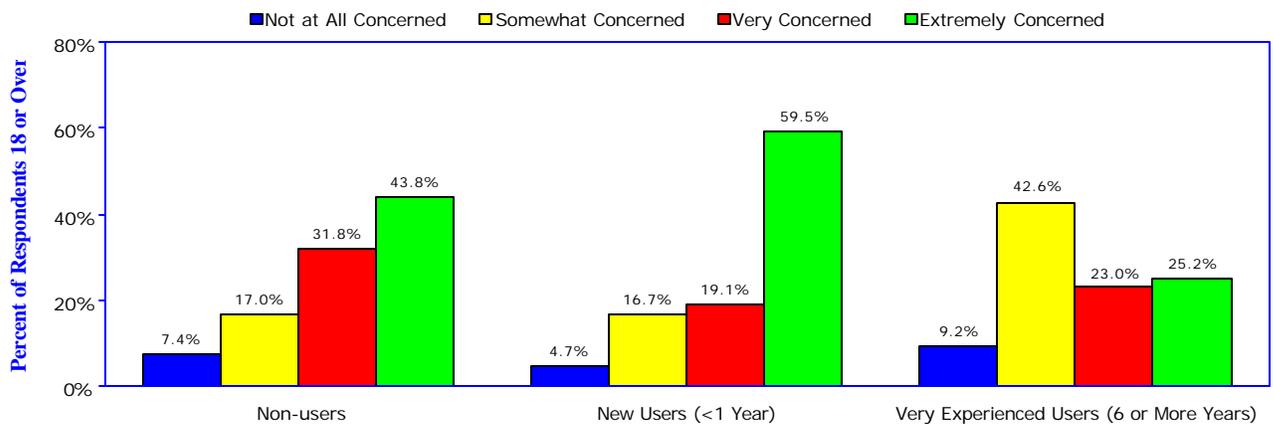


Comparing concerns based on Internet use reveals lower – but still relatively high – levels of concern among very experienced users.

Slightly less than half of very experienced users (48.2 percent) are very concerned or extremely concerned about the security of their credit card information when or if they buy online, compared to 78.6 percent of new users and 75.6 percent of non-users.

New users report the highest percentage of extreme concern about credit card security.

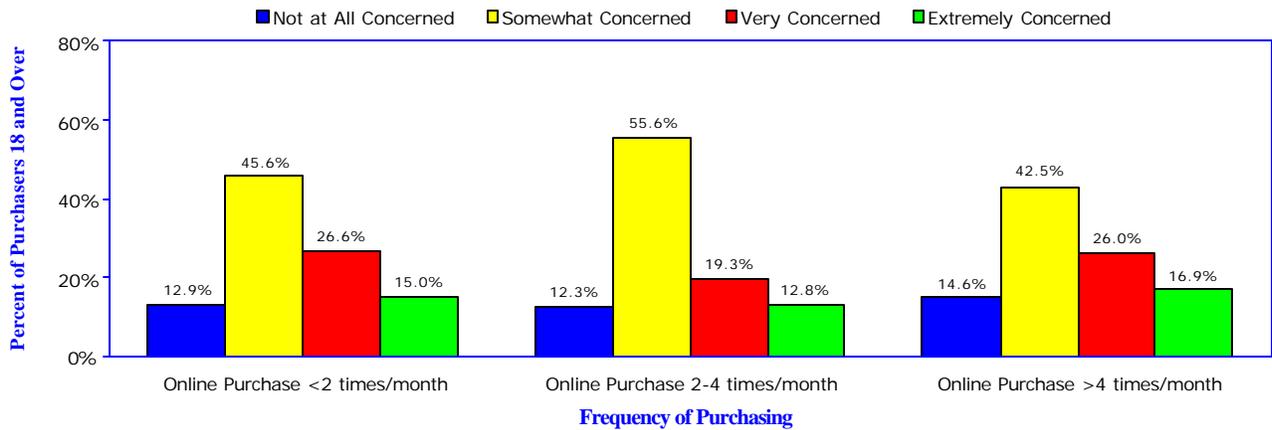
**Concerns About Credit Card Security When Buying Online: Non-Users, New Users, Very Experienced Users**



Concerns about credit card security do not decline based on the frequency of purchasing, but do decline when measured by the dollar amount of purchasing.

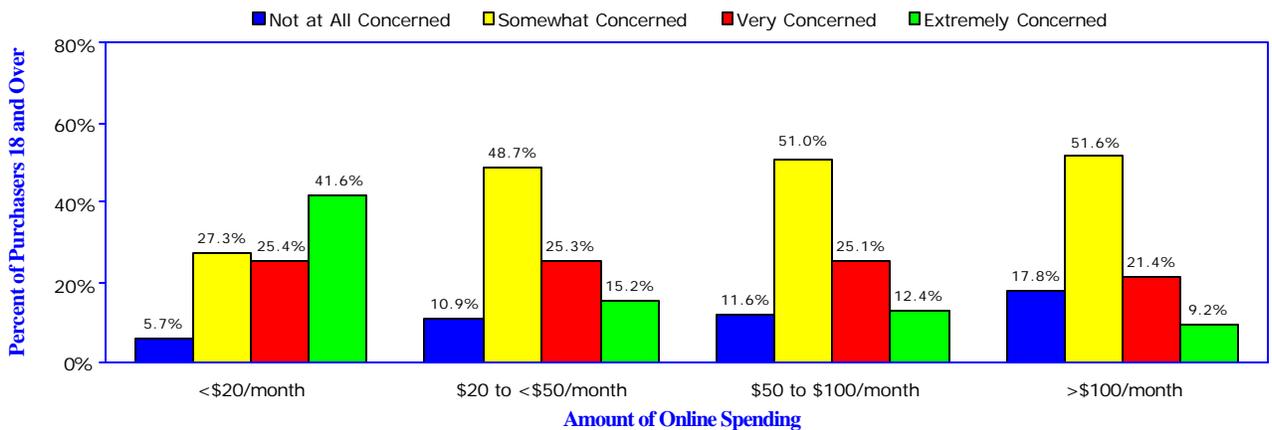
Of Internet buyers who purchase four or more times per month, 42.9 percent are very concerned or extremely concerned about credit card security online, compared to 32.1 percent of those who purchase 2-4 times per month and 41.6 percent of those who purchase less than twice per month.

**Concerns About Credit Card Security When Buying Online: By Frequency Of Purchasing**



The number of Internet buyers who are very concerned or extremely concerned about credit card security declines steadily from a high of 67 percent for those who spend less than \$20 per month to 40.5 percent (\$20-less than \$50 per month), to 37.5 percent (\$50-less than \$100 per month) and 30.6 percent (more than \$100 per month).

**Concerns About Credit Card Security When Buying Online: By Amount Of Spending**

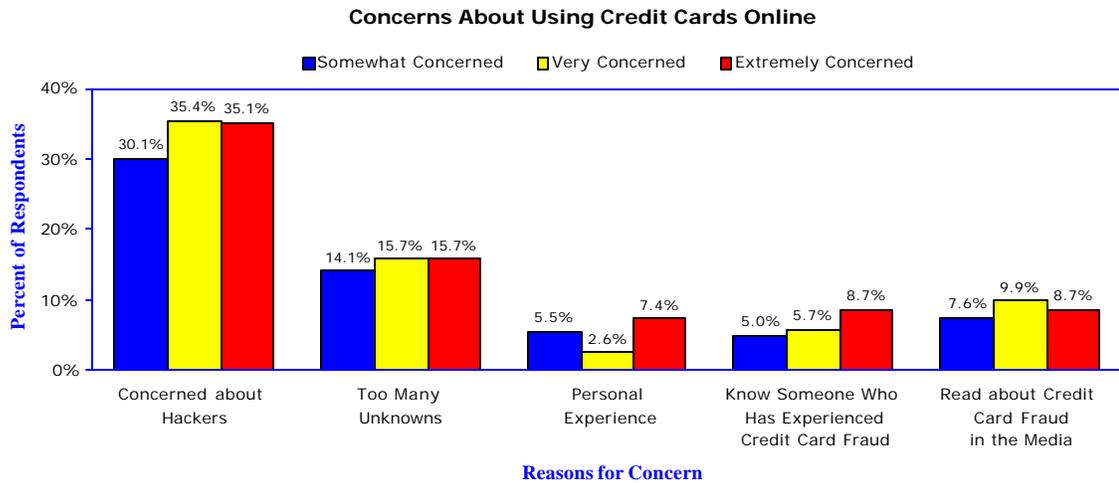


Concern about credit card information while shopping online remains a significant problem – this in spite of increases in national marketing by financial institutions about zero-liability and fraud protection for credit cards. Monitoring how concerns about online security change as the national dialogue increases will be a priority for the UCLA Internet Project.

### WHAT ARE YOUR CONCERNS ABOUT USING CREDIT CARDS ONLINE?

When asked about the specific reasons for their concerns about using credit cards online, respondents most frequently cite “hackers” as a cause for concern. “Too many unknowns” about online purchasing is the second most-cited reason.

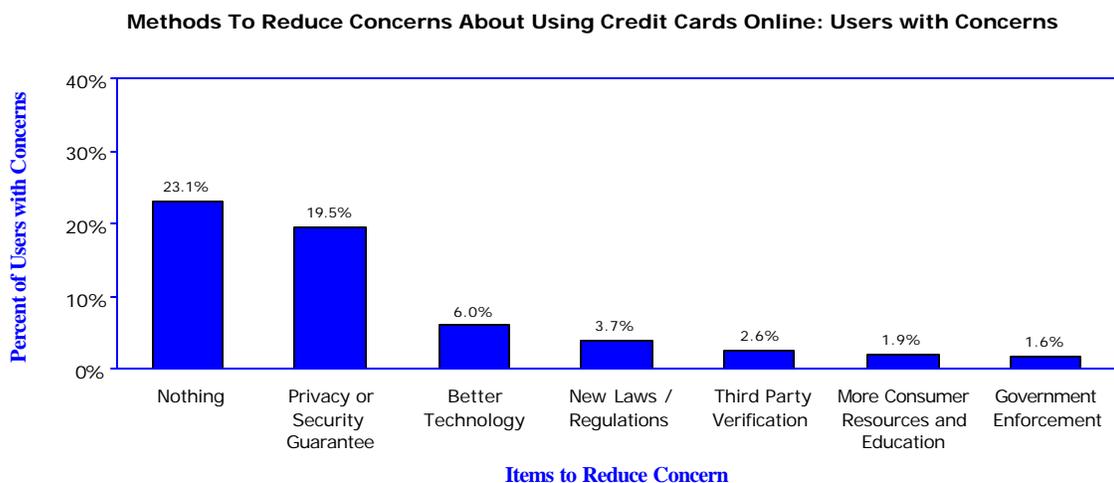
Notably, 8.7 percent of respondents say they are extremely concerned because they know someone who has been a victim of credit card fraud.



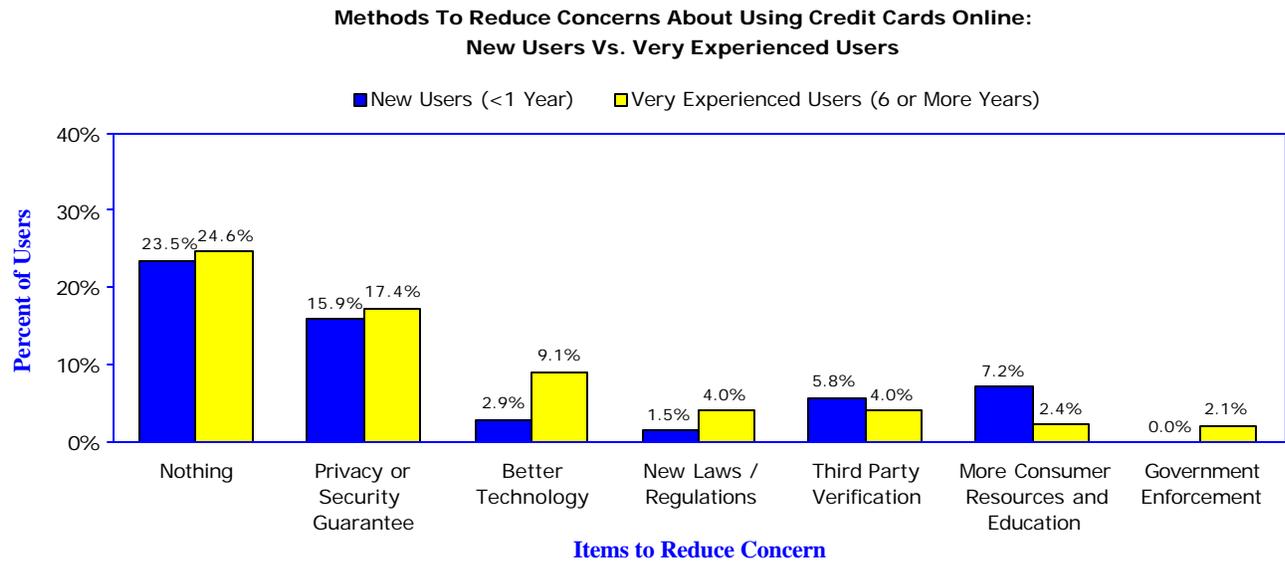
### WHAT WOULD REDUCE YOUR CONCERNS ABOUT USING A CREDIT CARD ONLINE?

For nearly one-quarter of the respondents (23.1 percent) who have some concerns about using their credit cards online, nothing will reduce their concerns about using a credit card online.

Those who believe that their concerns can be reduced cite a variety of methods that will help, led by privacy or security guarantees provided by an independent company. Other methods include better technology, and increased education and consumer awareness.



About the same percentage of very experienced users and new users say that nothing will reduce their concerns about using credit cards online.



Only a small percentage of users cite government enforcement as a method to reduce their concerns about online credit card use.

## COMMUNICATION PATTERNS

Electronic communication is the number one online activity, and thus one of the most popular leisure and business activities in the United States; given that 71.1 percent of Americans go online, and 87.9 percent of them use e-mail or instant messaging, this means that 62.5 percent of all Americans send e-mail or instant messages.

With the predominance of e-mail use, how does online communication affect users in 2002?

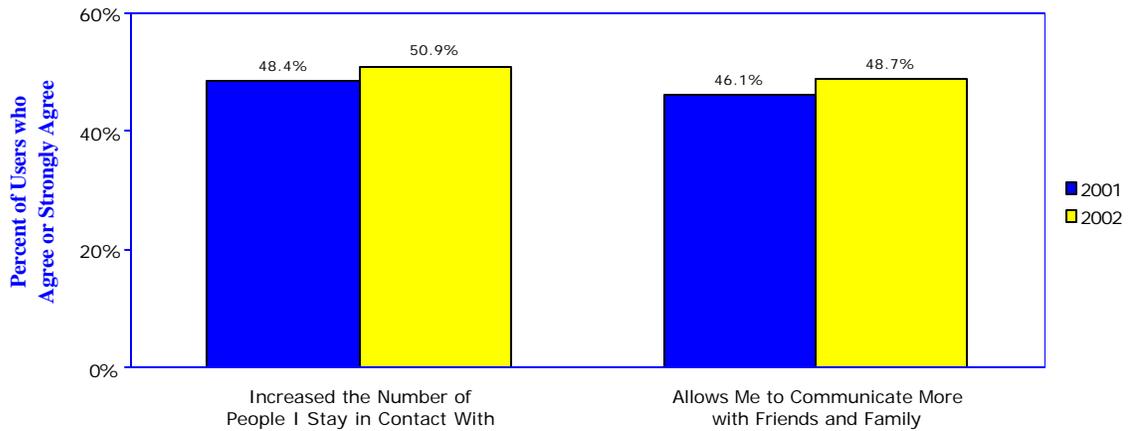
**ARE INTERNET USERS COMMUNICATING MORE WITH FAMILY AND FRIENDS?**

The Internet in 2002 continued to be a catalyst for creating and maintaining friendships and family relationships.

More than half of users in 2002 (50.9 percent) agreed or strongly agreed that since starting to use the Internet they increased the number of people with whom they stay in contact – up marginally from 48.4 percent in 2001.

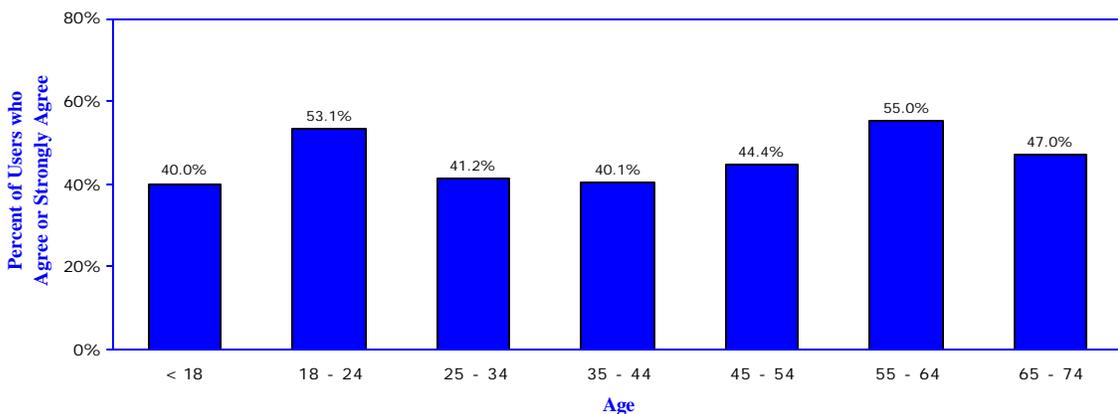
Almost half of users in 2002 (48.7 percent) said that the Internet allows them to communicate more with family and friends – up slightly from 46.1 percent in 2001.

**Since Using The Internet, Do You Communicate More With Family And Friends?  
(Agree or Strongly Agree)**



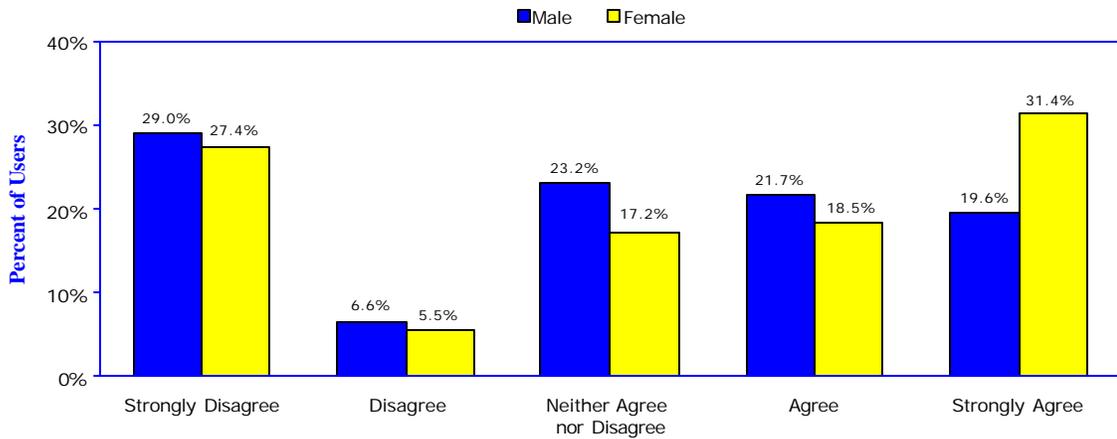
Large numbers of e-mail users in all age ranges agree with this question.

**Since Using The Internet, Do You Communicate More With Family And Friends?  
(Users By Age, Agree Or Strongly Agree)**



About the same number of men and women say that they do not communicate more with family and friends since using the Internet. Women show higher levels of agreement with this statement than men, with almost half of women (49.9 percent) either agreeing or strongly agreeing with this statement, compared to 41.3 percent of men.

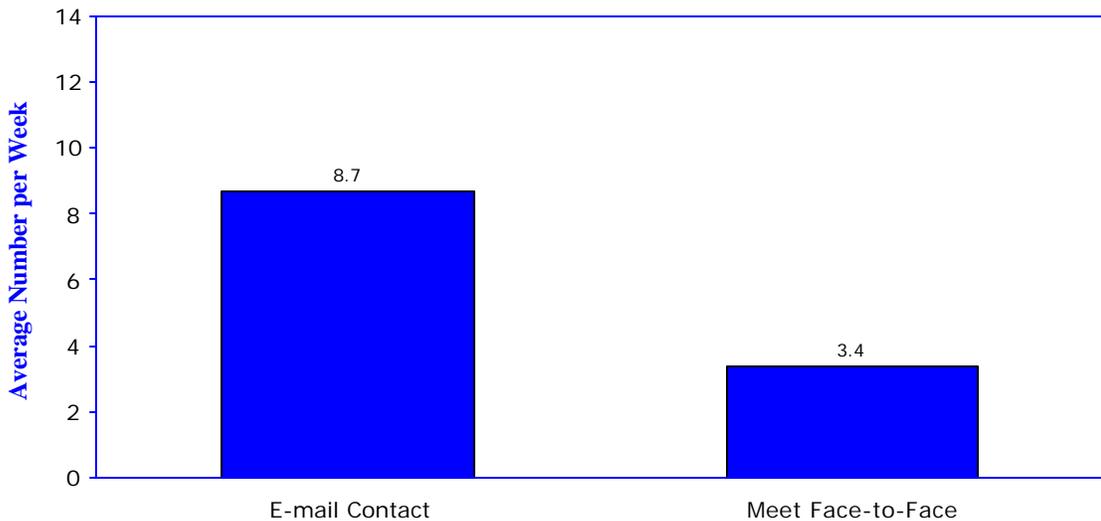
Since Using The Internet, Do You Communicate More With Family And Friends?(Male Vs. Female)



**E-MAIL CONTACT, PERSONAL CONTACT**

E-mail users maintain weekly online contact with an average of 8.7 correspondents. Of those people, e-mail users meet an average of 3.4 of these correspondents face-to-face.

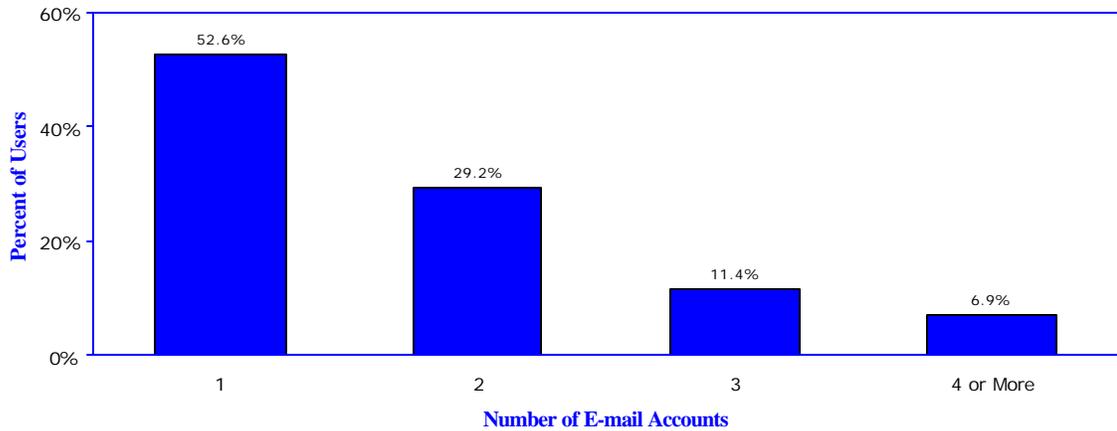
E-mail Correspondents: Weekly Online Contact And In-Person Contact



### E-MAIL: MULTIPLE ONLINE ADDRESSES

A new question in the UCLA Internet Project for 2002 asked e-mail users how many e-mail accounts they maintain. While more than half (52.6 percent) said they only maintain one e-mail account, almost 20 percent (18.3 percent) say they maintain three or more accounts.

**How Many E-mail Accounts Do You Have?**

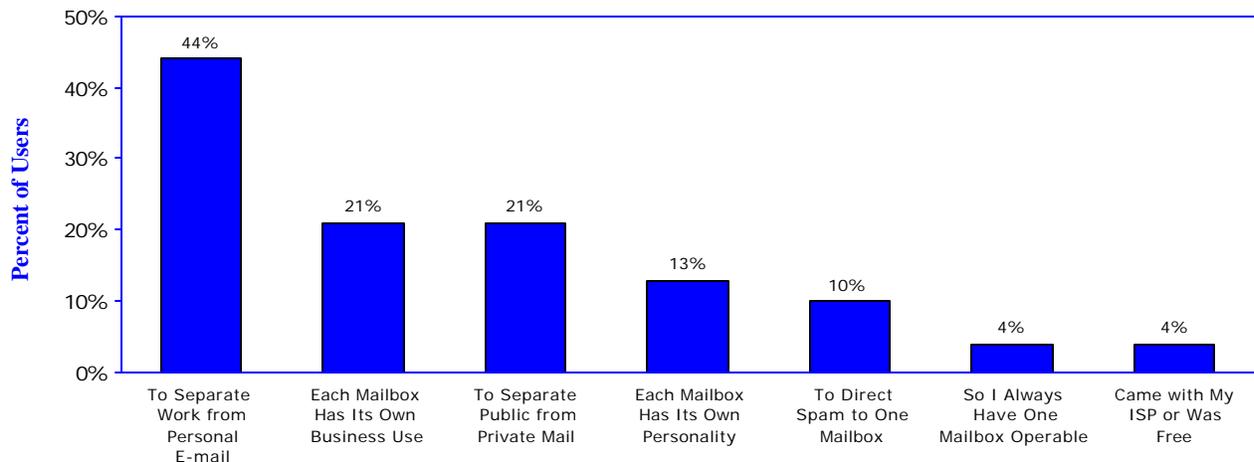


### WHY DO YOU HAVE MULTIPLE E-MAIL ADDRESSES?

E-mail users report a variety of reasons for maintaining multiple e-mail addresses. The most often cited reason is separating work e-mail from personal e-mail.

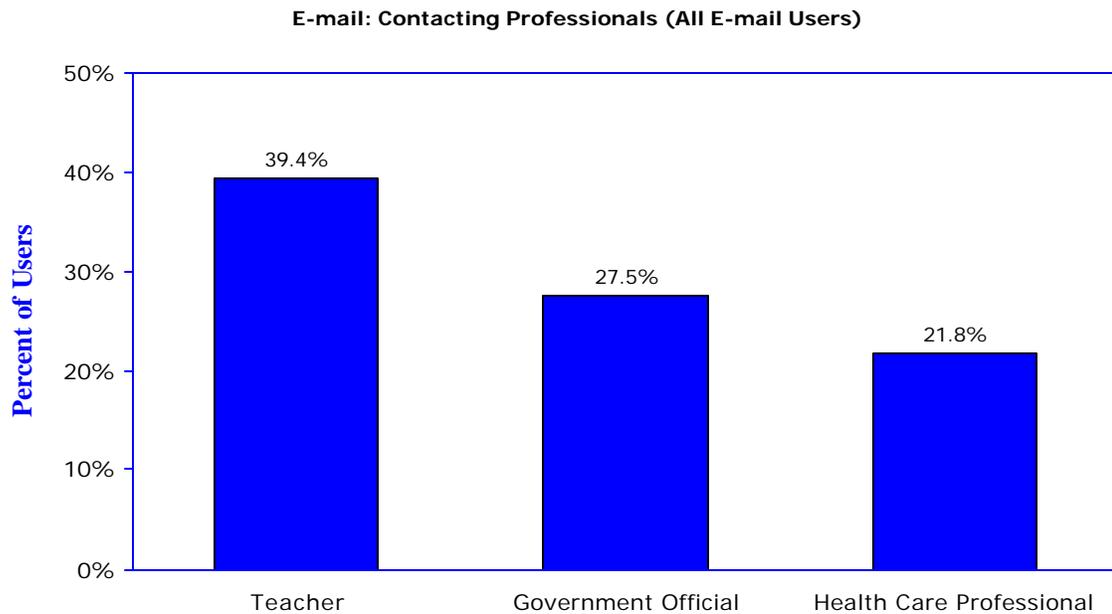
Notably, 13 percent of e-mail users say that “each mailbox has its own personality.” (For other questions about multiple online personalities, see page 60.)

**Multiple E-mail Addresses: Reasons Why**



## E-MAIL COMMUNICATION WITH PROFESSIONALS

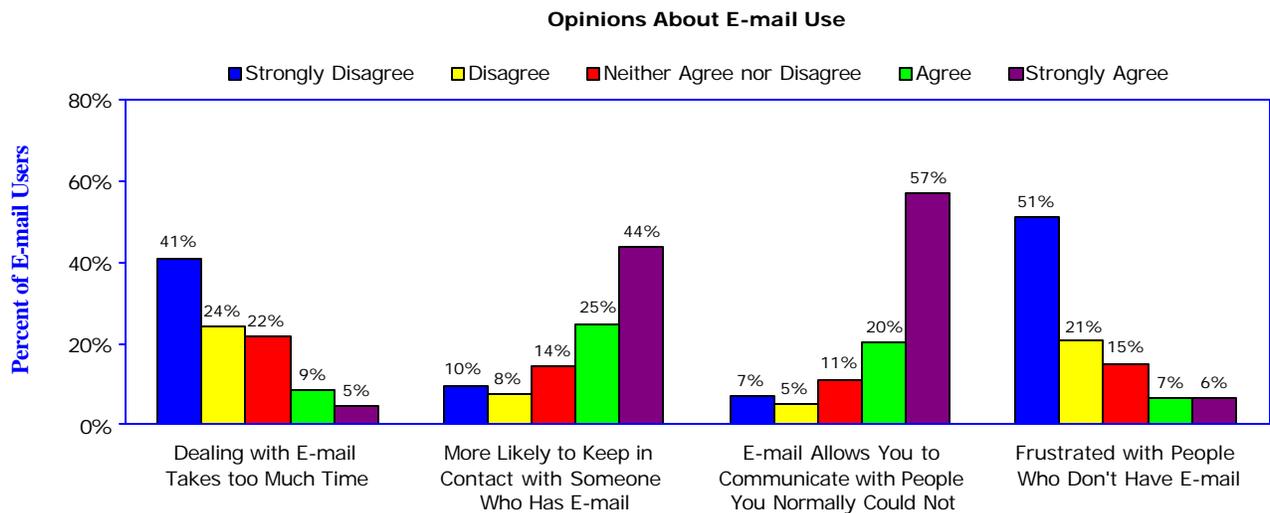
A new question in the UCLA Internet Project in 2002 explored whether e-mail users communicate online with various professionals, such as teachers, health care workers, or government officials. The study found that more than one-third of users (39.4 percent) used e-mail to contact a teacher, while slightly smaller percentages have contacted a government official or health care professional.



## OPINIONS ABOUT THE VALUE OF E-MAIL

E-mail spam, overloaded inboxes, the value of e-contact – these issues dominate hallway conversation about productivity at the office or family discussions about online activities at home. Nevertheless, substantial majorities of e-mail users say that e-mail is valued, does not require too much time, and is a key method for maintaining connections to people who would not be contacted otherwise. Yet users also remain patient with those who do not use e-mail.

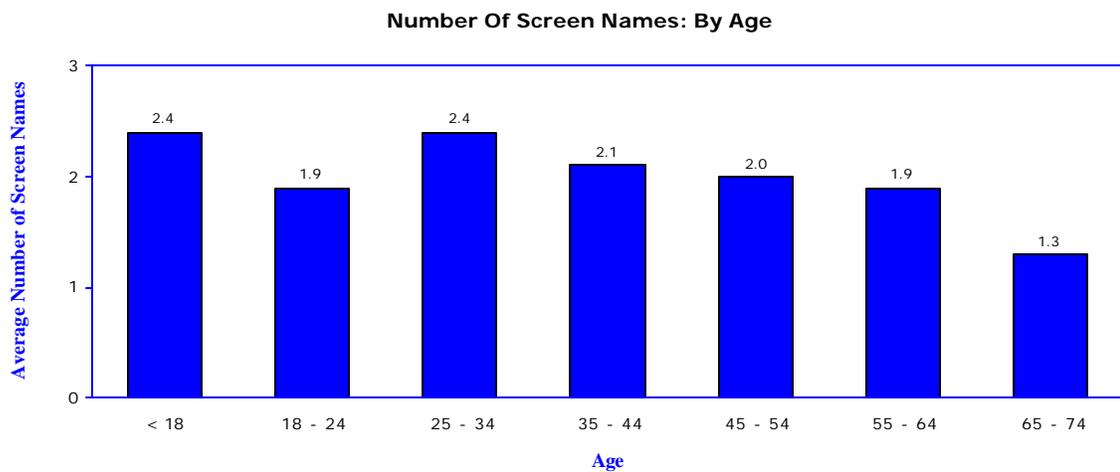
- When asked if dealing with e-mail takes too much time, nearly two-thirds of e-mail users in 2002 (65 percent) disagreed or strongly disagreed.
- When asked if e-mail users are more likely to keep in contact with people who have e-mail, 69 percent agreed or strongly agreed.
- When asked if e-mail allows users to communicate with people they normally could not, more than three-quarters (77 percent) agreed or strongly agreed. More than half (57 percent) of respondents strongly agreed with this statement – by far the largest amount of agreement on the questions about the value of e-mail.
- When asked if they are frustrated with people who do not have e-mail, 72 percent of users disagreed or strongly disagreed. Only 13 percent of e-mail users agreed or strongly agreed with this statement.



**SCREEN NAMES: HOW MANY DO YOU MAINTAIN?**

Many Internet users maintain more than one screen name that is used for e-mail, chat rooms, instant messaging, and other online communication. Internet users in 2002 averaged 2.2 screen names; men maintained an average of 2.3 screen names, while women maintain 2.1 names.

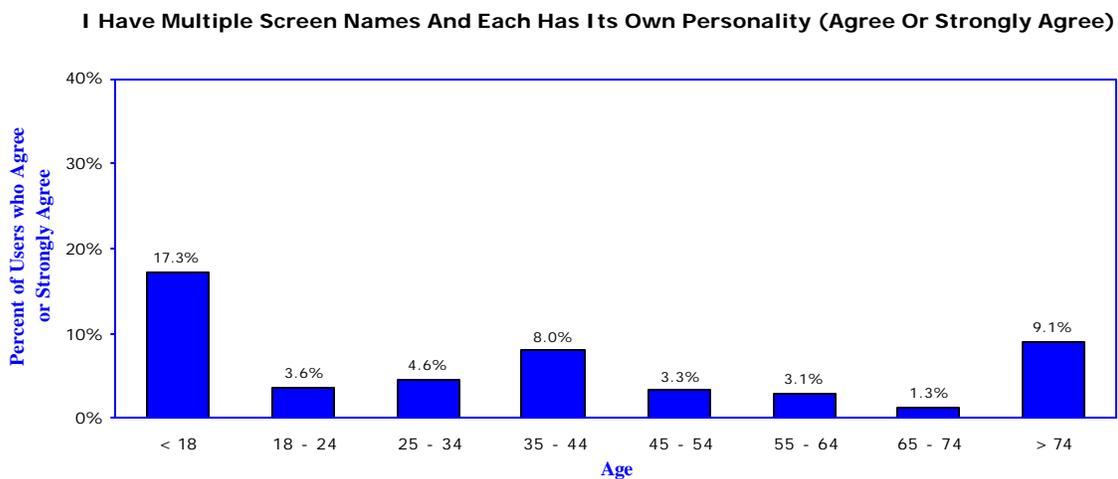
Although the use of more than one screen name is more common among young Internet users, the UCLA Internet Project in 2002 found that this trend spans all age ranges.



**DO YOU USE MULTIPLE SCREEN NAMES WITH DIFFERENT PERSONALITIES?**

A small number of users across all age ranges report that they have multiple screen names, and each name has its own personality.

The highest percentage of users with multiple screen names and personalities is under age 18.



The vast majority of users – 86 percent – disagreed or strongly disagreed with the statement about multiple screen names.

## SOCIAL EFFECTS

As the Internet becomes an increasingly commonplace aspect of daily life, online technology continues to shape household activity, personal interaction, and careers. The UCLA Internet Project explores a range of social and personal issues: the effects of the Internet on family, friends, children, the political process, and the workplace.

## THE INTERNET, FAMILY, AND FRIENDS

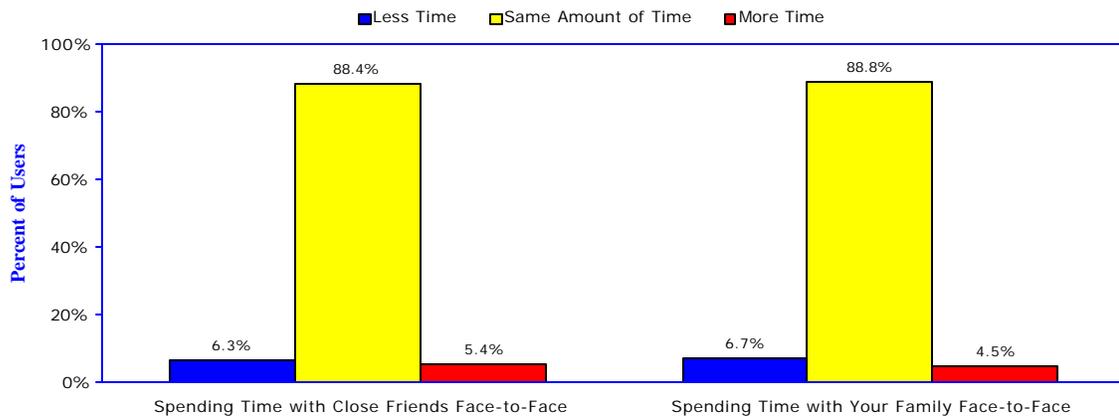
### TIME WITH FAMILY, TIME WITH FRIENDS

Most Internet users in 2002 continued to believe that the Internet has no influence on the amount of time they spend with their family. A near-equally high number say that Internet use has no effect on the time they spend with friends.

In 2002, 88.8 percent of Internet users said that since going online, they spend the same amount of time with their family face-to-face (virtually the same as in 2001 and 2000).

Similarly, 88.4 percent of users that said that since going online, they spend the same amount of time with their friends face-to-face (about the same as the 88.9 percent reported in 2001).

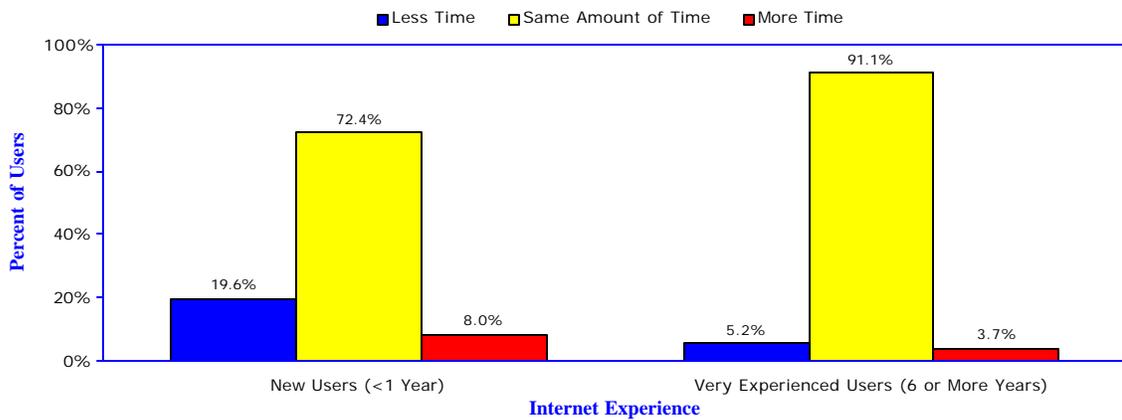
**Has Internet Use Changed The Amount of Time Spent With Family Or Friends, Face-To-Face? (All Users)**



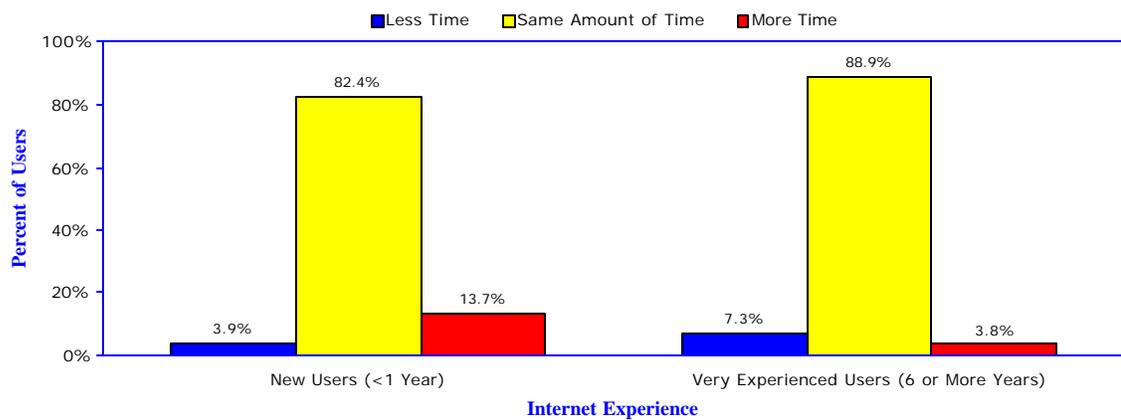
Although online experience has little effect on time spent with family, new use of the Internet does have a modest effect on time users say they spend with friends.

Nearly four times as many new users (19.6 percent) than very experienced users (5.2 percent) said that since starting to use the Internet, they spend less time face-to-face with friends. More of the very experienced users (7.3 percent) than new users (3.9 percent) said they spend less time with family since starting to use the Internet.

**Has Internet Use Changed The Amount Of Time Spent With Friends Face-To-Face?  
(New Users Vs. Very Experienced Users)**



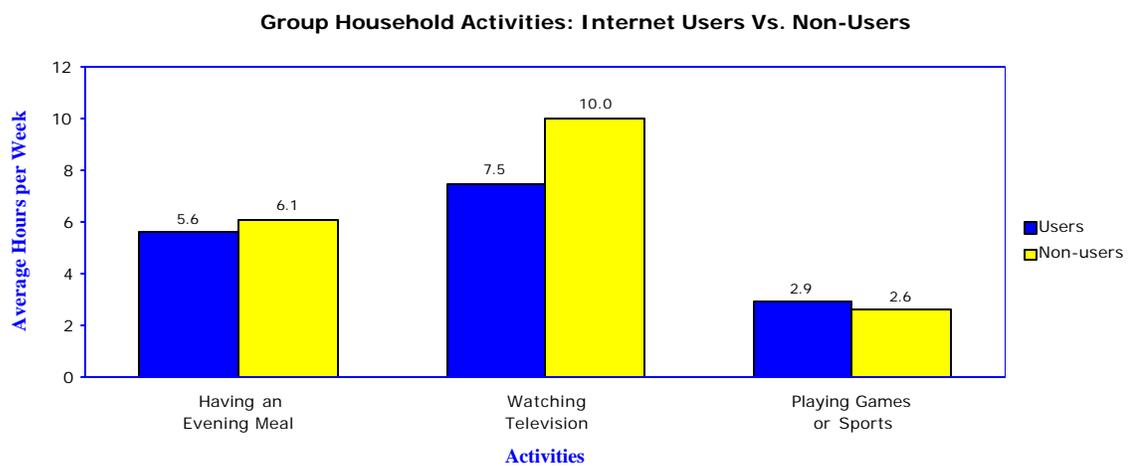
**Has Internet Use Changed The Amount Of Time Spent With Family Face-To-Face?  
(New Users Vs. Very Experienced Users)**



### DOES ONLINE EXPERIENCE AFFECT FAMILY ACTIVITIES?

Internet users and non-users report similar amounts of time involved in a variety of activities with other members of their household – except watching television.

Users and non-users report about the same amount of hours per week having an evening meal, or playing games or sports with other members of the household. However, Internet users report lower levels of group television viewing than do non-users.



## CHILDREN AND THE INTERNET

The Internet has been a generally available communications tool for almost nine years – thus an entire generation of children is growing up with the Internet as part of their daily lives. The UCLA Internet Project continues to explore how going online affects children’s time, their friendships, their schoolwork, and their television viewing.

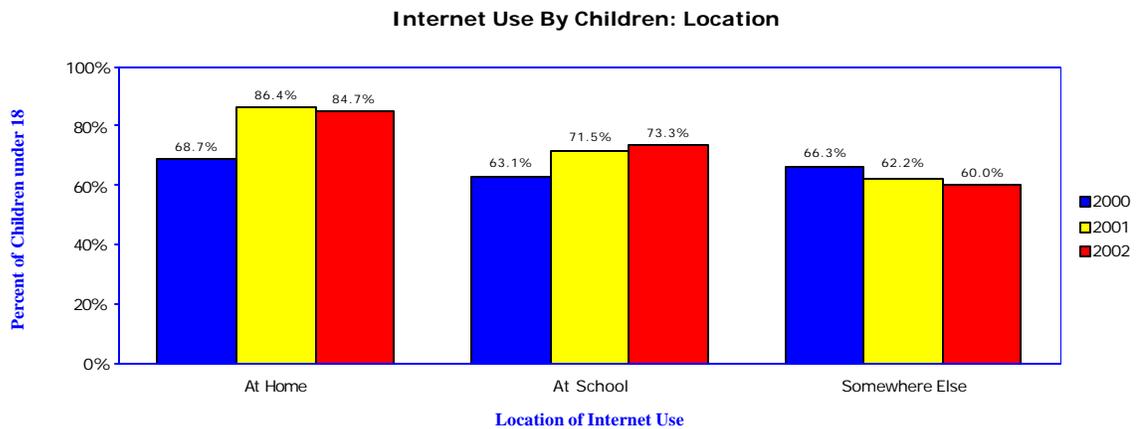
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### WHERE DO CHILDREN USE THE INTERNET?

Most children who use the Internet can go online at home.

Well over 80 percent of children who used the Internet in 2002 went online at home – about the same as in 2001 (86.4 percent) but higher than 2000 (68.7 percent).

Increasing numbers of children can use the Internet at school. Nearly three-quarters (73.3 percent) of children who used the Internet in 2002 went online at school, up from 63.1 percent in 2000.



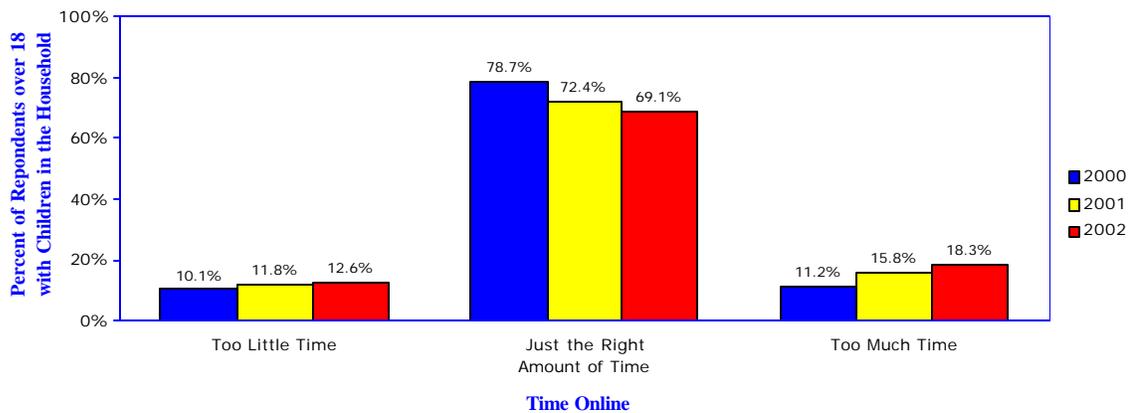
### CHILDREN ON THE INTERNET AND WATCHING TELEVISION: THE RIGHT AMOUNT OF TIME?

Large numbers of adults in 2002 (44.9 percent) said that the children in their households spend too much time watching television, while far fewer (18.3 percent) said children spend too much time online.

However, when asked about the time children spend using the Internet, a large but declining number of adults said the children in their household spend “just the right amount of time” or “too little time” online – 81.7 percent in 2002, down from 84.2 percent in 2001 and 88.8 percent in 2000.

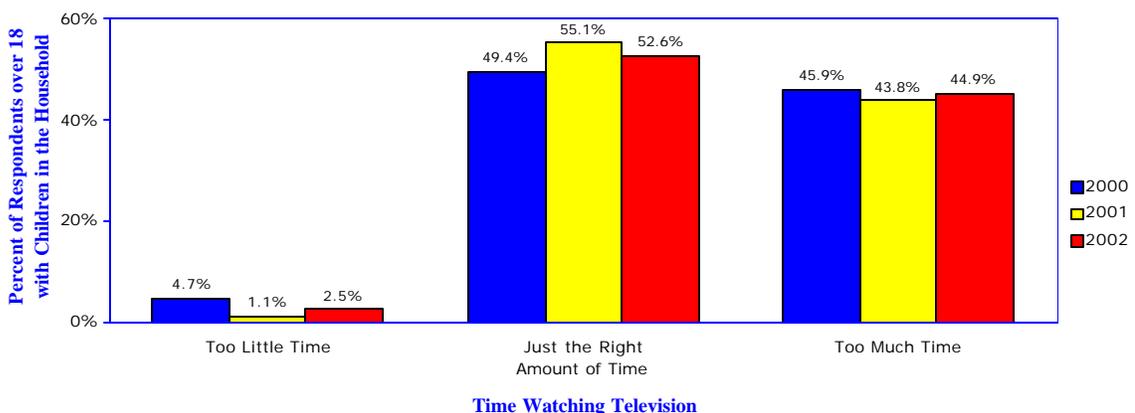
And, the adults who said that children spend too much time online is drifting upward over the three years of the UCLA Internet studies – from 11.2 percent in 2000 to 15.8 percent in 2001 to 18.3 percent in 2002.

Children Online: The Right Amount Of Time?



Regarding children and television viewing, 55.1 percent of adults in 2002 said children spend about the right amount of time or too little time watching television – a statistically insignificant difference from 56.2 percent in 2001 and 54.1 percent in 2000.

Children Watching TV: The Right Amount Of Time?

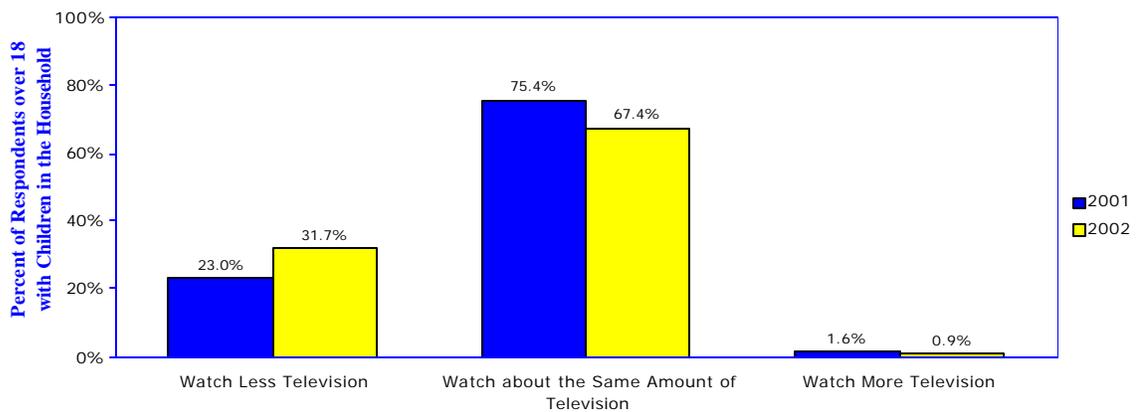


### HAS INTERNET USE CHANGED CHILDREN'S TV VIEWING HABITS?

Adults in both the 2002 and 2001 studies by the UCLA Internet Project reported that children in their household watch less television since they began to use the Internet.

Almost one-third (31.7 percent) of these adult respondents reported that the children in their household now watch less television than before they started using the Internet at home – up from 23 percent in 2001.

Internet Use: Does It Change Children's Television Viewing?

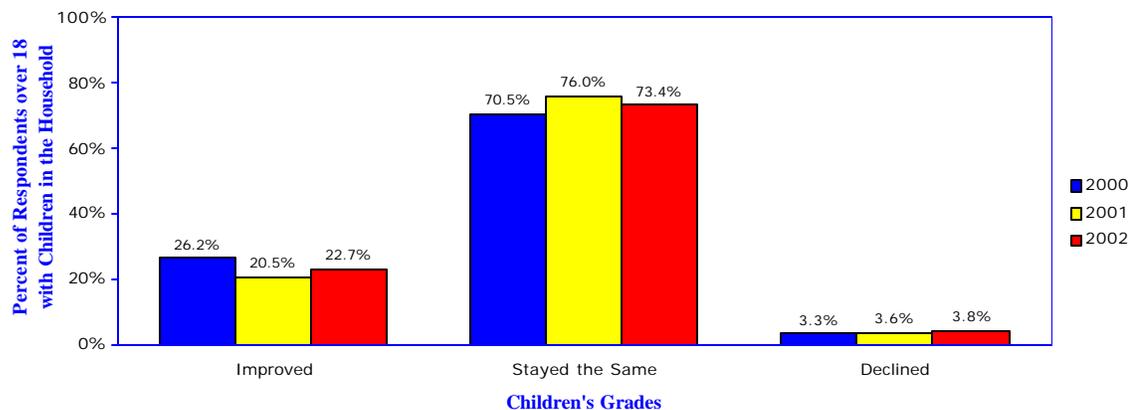


### SCHOOL GRADES AND THE INTERNET

Does Internet use affect school grades? Even though respondents consistently say that online access is a powerful tool for information gathering, the Internet is not perceived by most users as having an effect on school grades.

Nearly three-quarters of adults in 2002 (73.4 percent) said that since their household acquired the Internet, the grades of children in their households have stayed the same – down from 76 percent in 2001 but higher than 70.5 percent in 2000.

The Internet: Effect on Children's School Grades

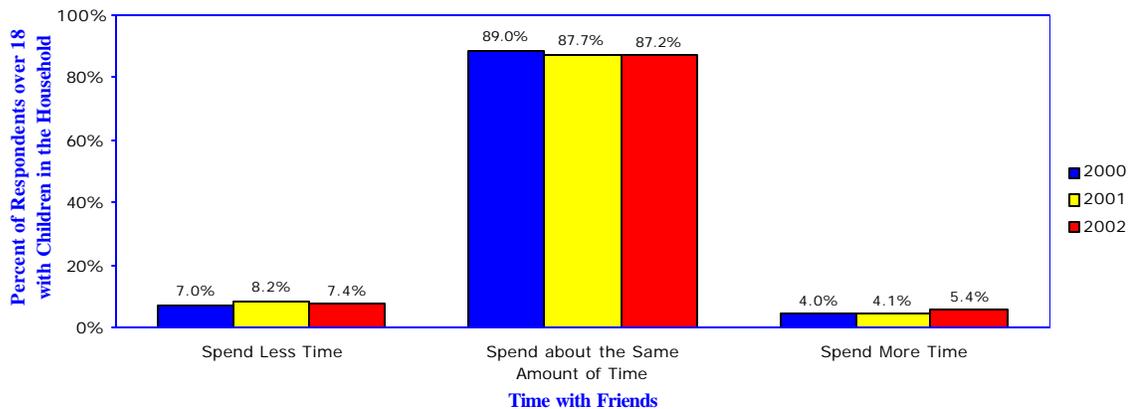


### CHILDREN, THE INTERNET, AND INTERACTION WITH FRIENDS

In all three studies by the UCLA Internet Project, adults with children in their household say in nearly identical numbers that the Internet has little effect on the interaction of their children with friends.

In 2002, 87.2 percent of adults in households with children said that since they acquired the Internet, the children in their household spend about the same amount of time with friends – a statistically insignificant difference from 87.7 percent in 2001 and 89 percent in 2000.

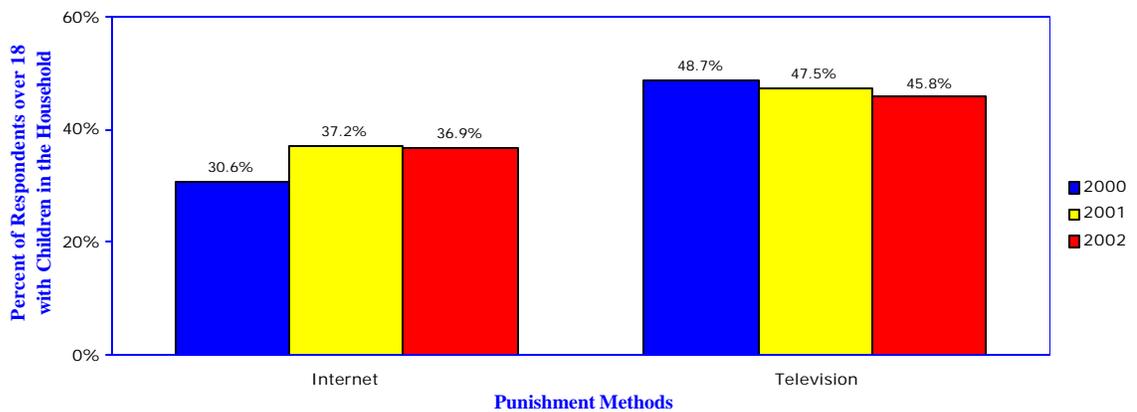
**Does The Internet Affect Children’s Time With Friends**



### INTERNET ACCESS AND TELEVISION VIEWING: PUNISHMENT TOOLS?

Denying access to the Internet was used as a tool for punishing children at about the same level in 2002 as in 2001. Denial of television is still used more often as a punishment.

**Internet Access and Television Viewing: A Punishment Tool?**



## POLITICAL POWER AND INFLUENCE

The three studies by the UCLA Internet Project have all found that going online can be an important resource for gathering information about political issues; however, relatively small numbers of users believe that the Internet gives them more political power, or helps them influence political decisions and government officials.

Moreover, the percentage of users who believe that by using the Internet people can have input into government, or more political power, is declining – this is in spite of growing trends in electronic communication among politicians, advocacy groups, and voters.

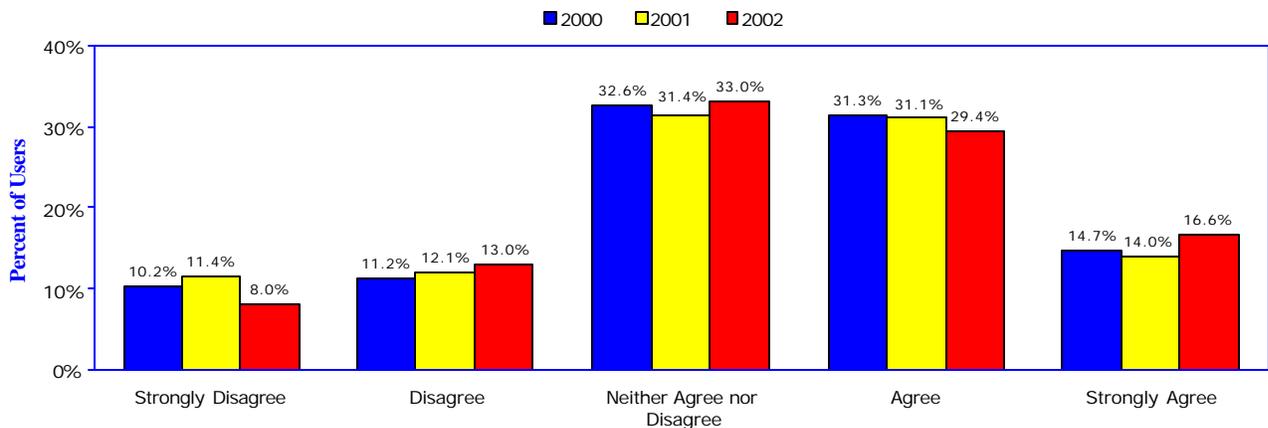
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### DOES THE INTERNET HELP WITH POLITICAL KNOWLEDGE?

When asked, “by using the Internet people like you can better understand politics,” 46 percent of users in 2002 agreed or strongly agreed – virtually the same as the 45.1 percent reported in 2001 and the same as in 2000.

In 2002, 21 percent disagreed or strongly disagreed with this statement, down from 23.5 percent in 2001 and 21.4 percent in 2000.

Does the Internet Help People Like You Better Understand Politics? (Users)

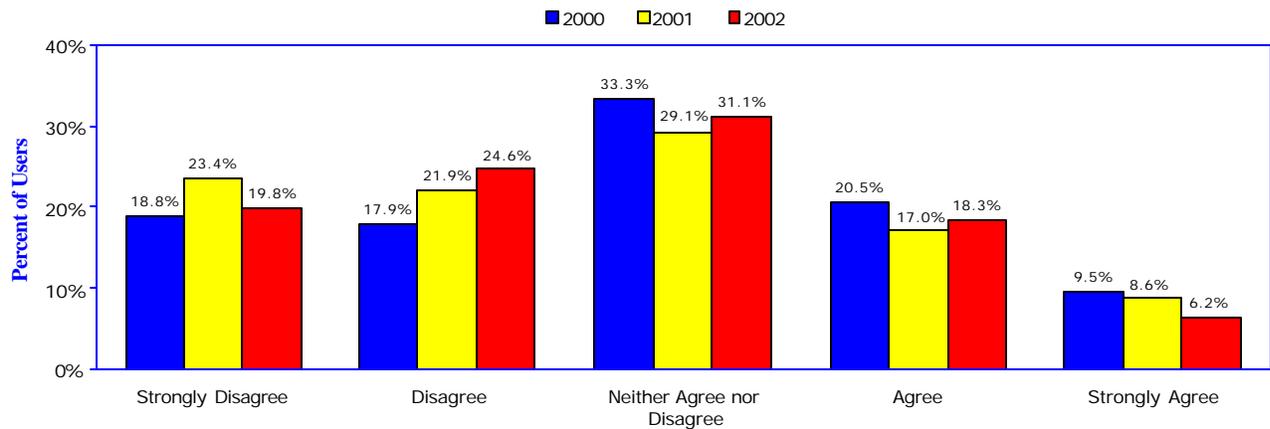


### IS THE INTERNET A TOOL TO HELP GAIN POLITICAL POWER?

When asked, “by using the Internet people like you can have more political power,” the number of users who agreed continues to decline. Less than one-quarter of Internet users in 2002 (24.5 percent) agreed or strongly agreed, down from 25.6 percent in 2001 and 30 percent in 2000.

In 2002, 44.4 percent of users disagreed or strongly disagreed with this statement, compared to 45.3 percent in 2001 and 36.7 percent in 2000.

**By Using the Internet People Like You Can Have More Political Power? (Users)**

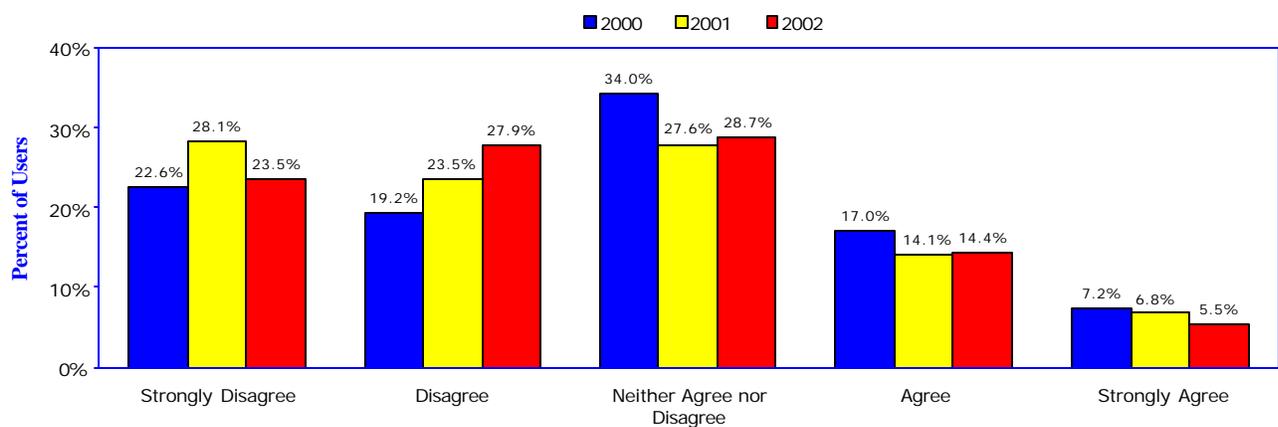


### CAN THE INTERNET GIVE USERS MORE SAY ABOUT WHAT THE GOVERNMENT DOES?

When asked, “by using the Internet people like you will have more say about what the government does,” 19.9 percent of users in 2002 agreed or strongly agreed, continuing the drop from 20.9 percent in 2001 and 24.2 percent in 2000.

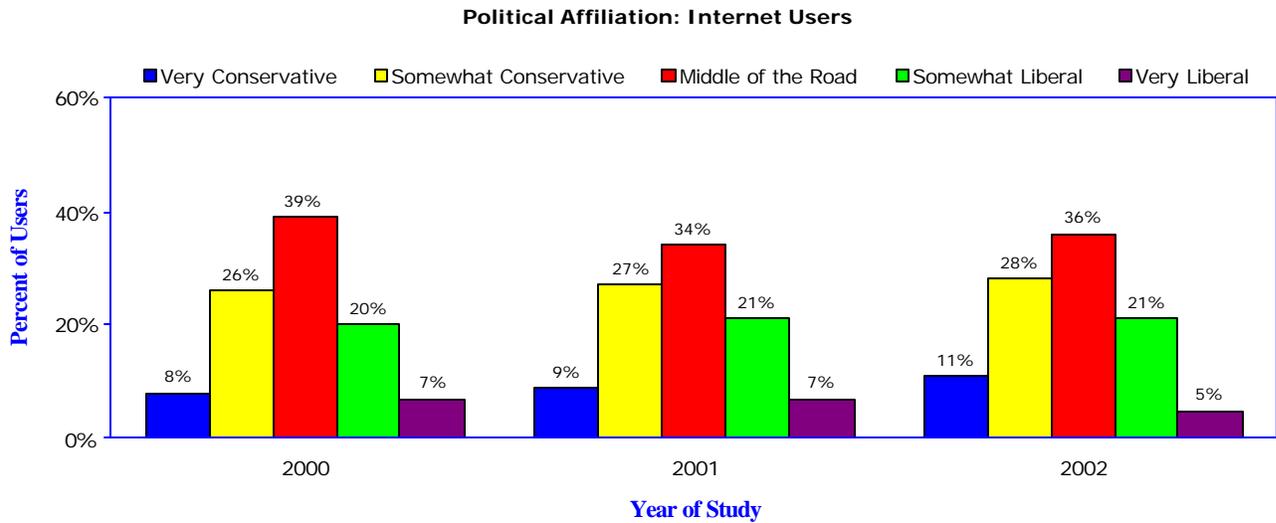
Only 5.5 percent of users strongly agreed that people will have more say in government – the lowest level of strong agreement in the questions about the Internet’s role in the political process.

**Does The Internet Give People More Say About What The Government Does? (Users)**

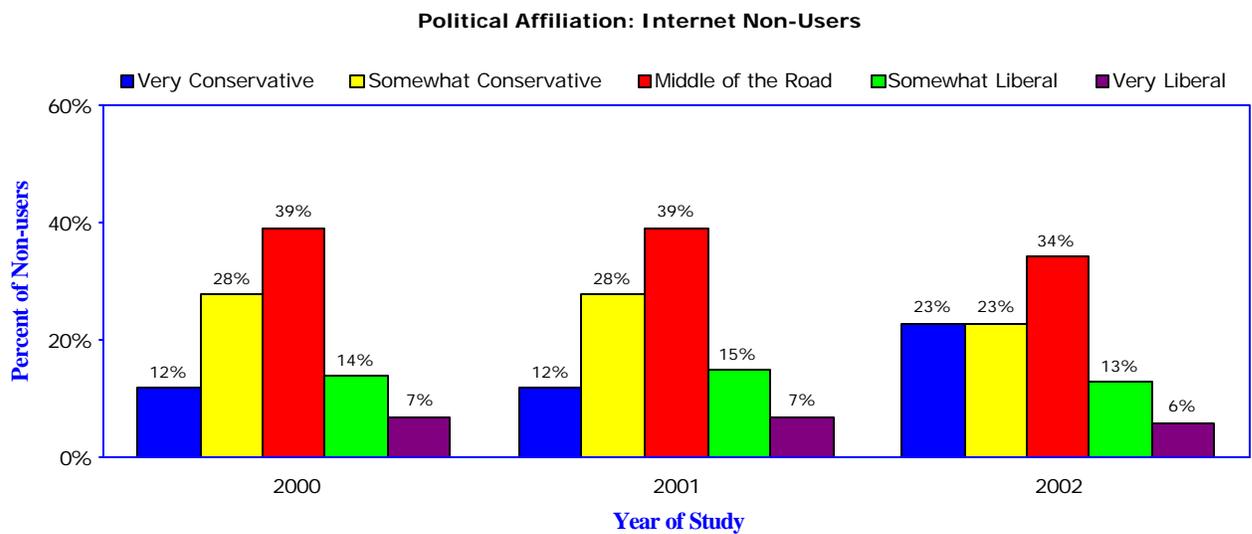


**POLITICAL AFFILIATION**

As in the 2001 and 2000 studies, there was little difference in 2002 in the political orientation of Internet users and non-users, except at the conservative political extreme.



In the 2002 study, 23 percent of non-users identified themselves as very conservative – up from 12 percent in 2001 and 2000.



## THE INTERNET AT WORK

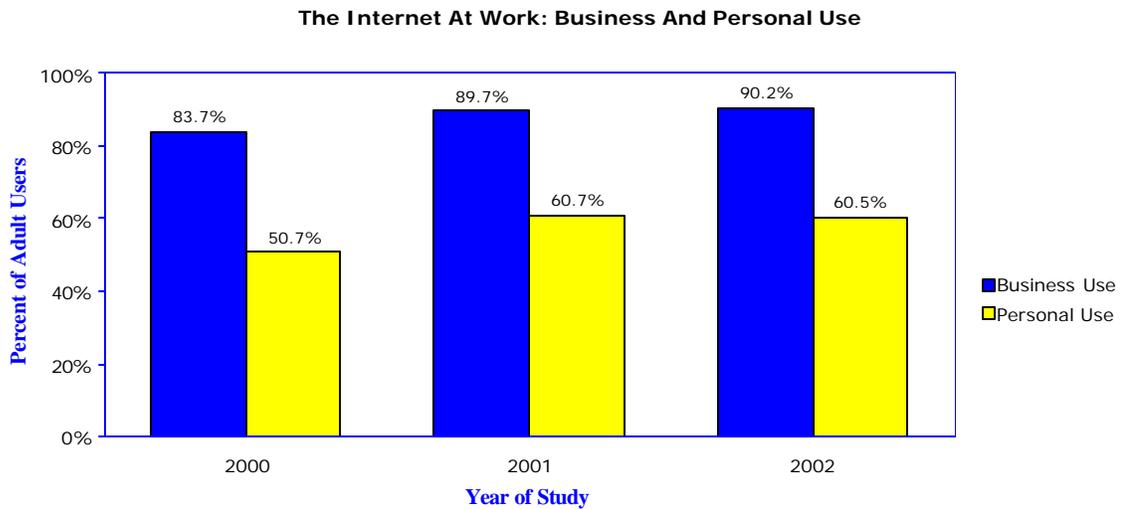
All three UCLA studies of the Internet show extensive use of online services and e-mail in the workplace – both for business and personal use. In 2002, do employers monitor e-mail and Internet use? Does the Internet affect productivity?

\* \* \* \* \*

### THE INTERNET AT WORK: BUSINESS AND PERSONAL USE

Internet users continue to report growing levels of Internet access at work for both personal and professional use. Of those who had access to the Internet at work in 2002, about 90 percent visited Web sites for business purposes, about the same as 2001 and up slightly over 2000.

Of those who had Internet access at work in 2002, 60.5 percent visited Web sites for personal use.

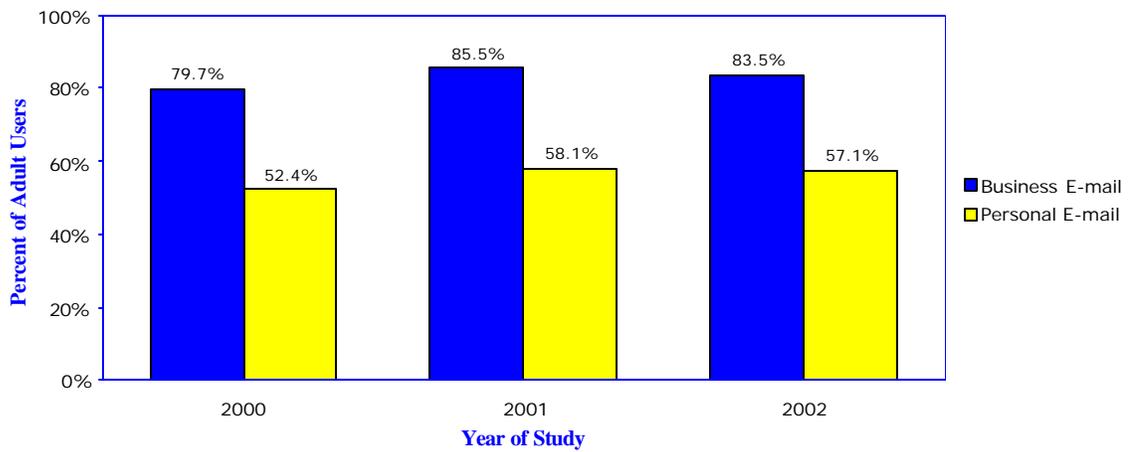


## E-MAIL AT THE OFFICE: BUSINESS AND PERSONAL USE

Internet users continue to report high levels of e-mail access at work for both personal and professional use. More than 83 percent of those who use the Internet at work in 2002 accessed business e-mail from work, slightly lower than 2001 (85.5 percent) but slightly higher than 2000 (79.7 percent).

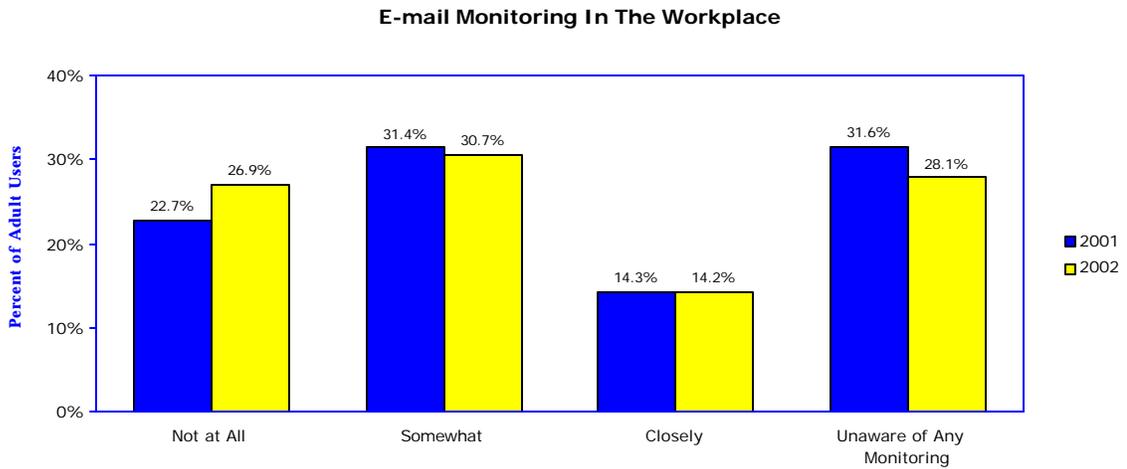
About 57 percent of those who use the Internet at work in 2002 accessed their personal e-mail from work, again about the same as 2001 (58.1 percent) but higher than 2000 (52.4 percent).

**E-mail Access At Work: Business And Personal**

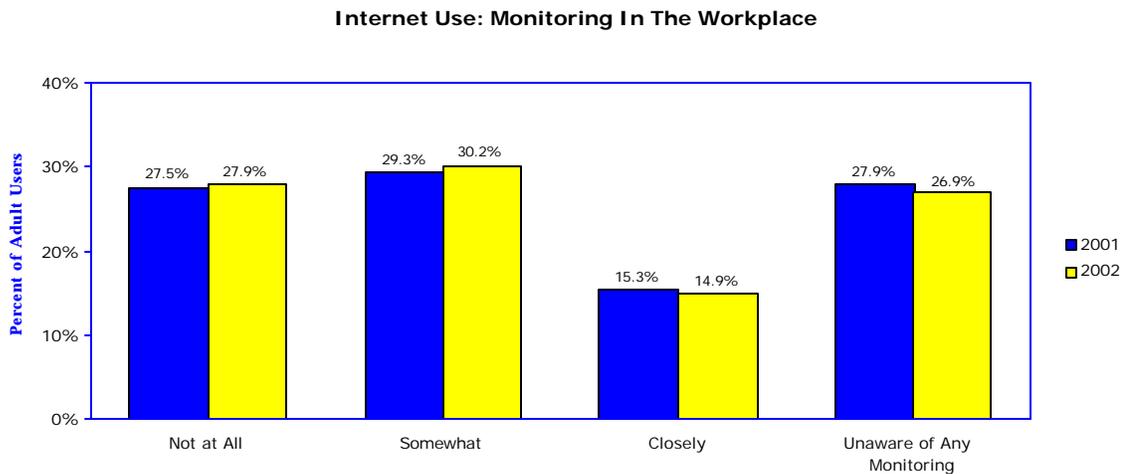


### DO EMPLOYERS MONITOR E-MAIL AND INTERNET USE AT WORK?

Do employees think their employers monitor their e-mail at work? About 45 percent (44.9 percent) of respondents who use e-mail at work in 2002 said their e-mail is monitored by their employers, either “somewhat” or “closely” – about the same as in 2001.



An almost identical percentage of 2002 respondents (45.1 percent) said their employers monitor their Internet use either somewhat or closely – nearly the same as 2001 responses.

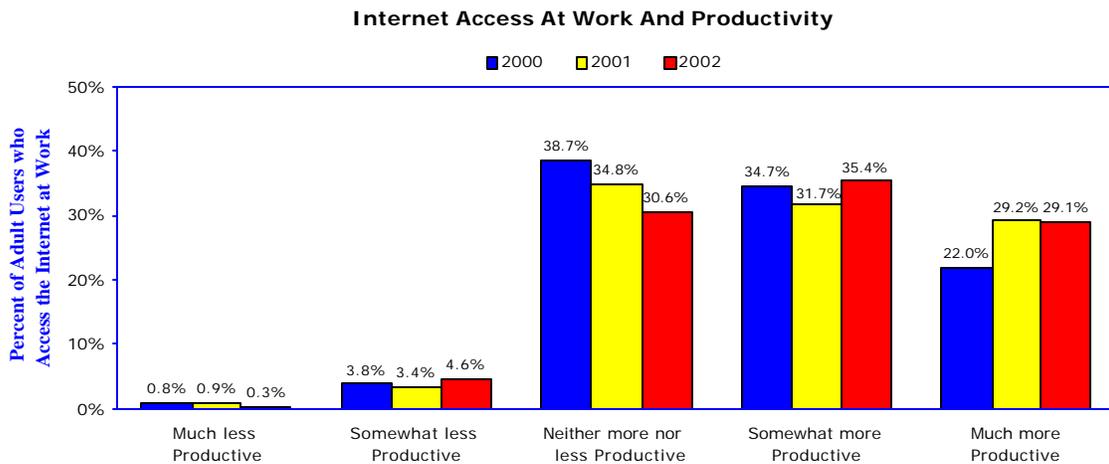


In 2002, more than half of respondents said their employers do not monitor their use of e-mail or the Internet, or they are unaware of monitoring.

### DOES THE INTERNET AFFECT PRODUCTIVITY?

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

In 2002, 64.5 percent of users said that access to the Internet at work makes them somewhat more productive or much more productive, up from 60.9 percent of users in 2001 and 56.7 percent in 2000. The number of users who said that the Internet makes them neither more nor less productive continues to decline.



## CONCLUSIONS

Have the opinions of Internet users and non-users changed over the three studies conducted by the UCLA Internet Project? Are users satisfied with the Internet? How do the views of users and non-users compare when they are asked about the value and importance of online technology? Do users and non-users believe that online technology makes the world better or worse?

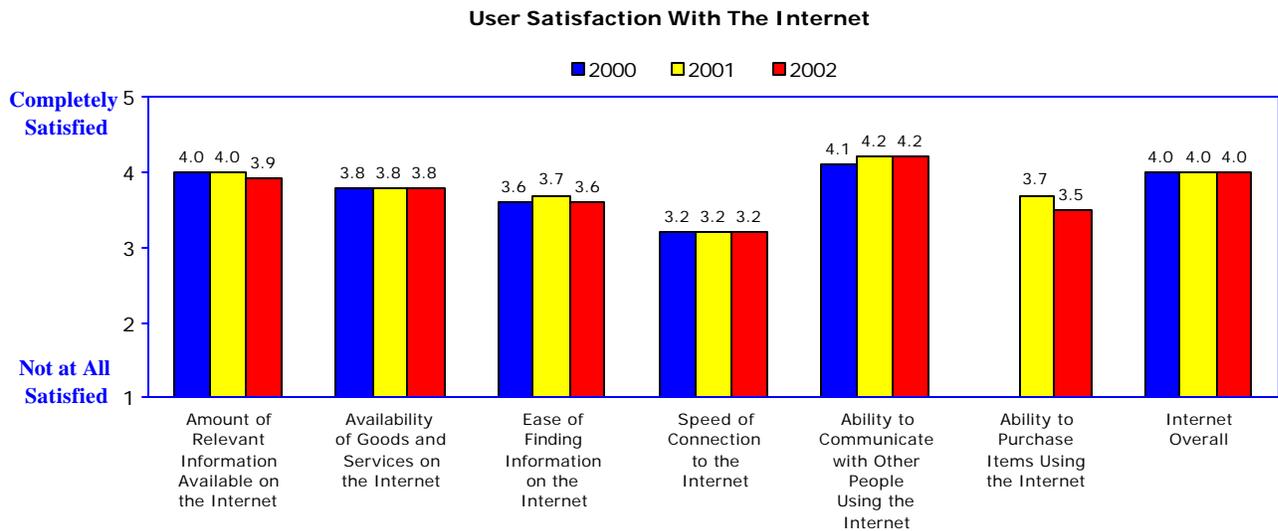
What are the issues that have emerged from the UCLA Internet Project in 2002?

### ARE USERS SATISFIED OR DISSATISFIED WITH THE INTERNET?

Overall, users of the Internet in 2002 were generally satisfied with online technology at levels nearly identical to 2001 and 2000. Overall, the Internet was rated 4.0 on a scale of 1 (not satisfied) to 5 (completely satisfied).

In all three years of the UCLA Internet Project, users are most satisfied with the ability to communicate with other people on the Internet. The second-highest level of satisfaction was with the amount of relevant information available online.

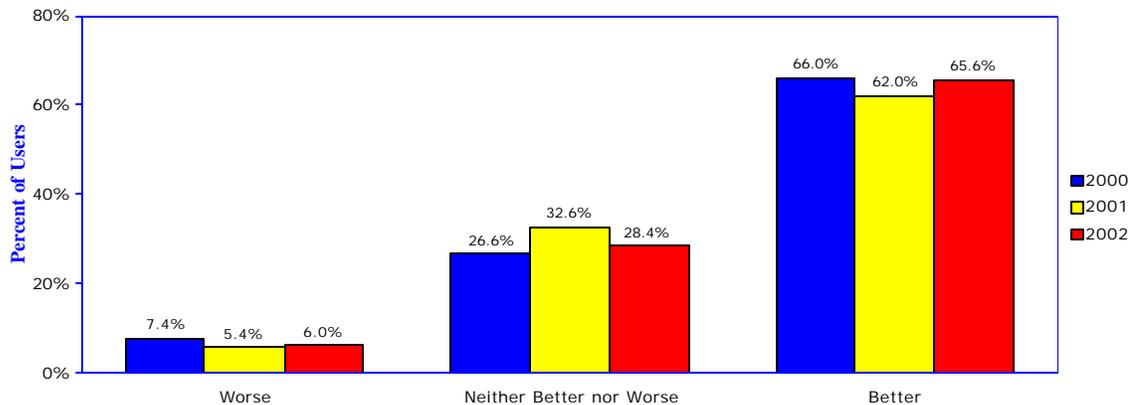
Users remain generally satisfied with the availability of goods and services on the Internet, as well as with the ease of finding information online. Users continue to be least satisfied with the speed of their connection to the Internet at nearly identical levels in all three surveys – this in spite of steady growth in the number of users who access online services through broadband.



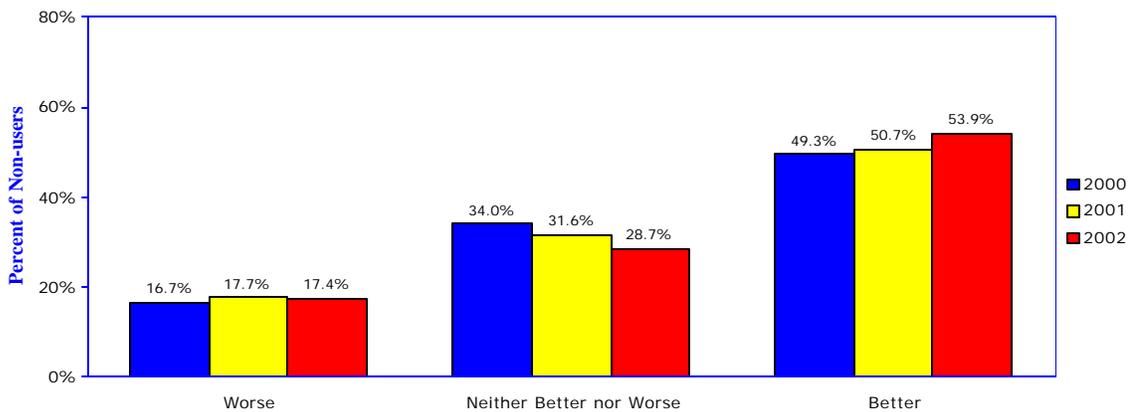
## HOW HAS COMMUNICATION TECHNOLOGY AFFECTED THE WORLD?

Attitudes about the effect of communication technology on the world remain generally stable across the three years of the UCLA Internet Project; nearly two-thirds of users in 2002 (65.6 percent) and more than half of non-users (53.9 percent) said that communication technology, including the Internet, makes the world a better place.

**Has Communication Technology Made The World A Better Place (Users)**



**Has Communication Technology Made The World A Better Place (Non-Users)**



The number of non-users who say that communication technology makes the world a better place has grown, although slightly, since the study began.

However, about the same number of non-users in all three studies (17.4 percent in 2002) say communication technology makes the world a worse place – nearly three times the number of Internet users (6 percent in 2002) who provide the same response.

By comparison, of respondents who were asked the same question about television, 40 percent of users and 41 percent of non-users said television made the world a better place, while 17 percent of users and 22 percent of non-users said television made the world a worse place.

## **INTERNET ISSUES AND TRENDS IN 2002**

The findings in Year Three of the UCLA Internet Project illuminate several issues about online technology and its impact on America that inspire broader discussion:

### **1. THE CONTINUING GROWTH OF THE INTERNET – POST DOT-COM COLLAPSE**

“The Internet is dead” – or so some observers would have had us believe after the dot-com crash. But the only thing dead about the Internet is the extravagant, unrealistic, “anything goes” attitude that prevailed in the dot-com sector during the late 1990s.

Perhaps the most important point to remember about the collapse of the dot-com boom in 2000 and 2001 is that the dot-com industry and the Internet itself are not the same thing – yet the collapse of the dot-coms could have sunk the Internet as an important and credible tool for communications and information gathering. Indeed, as we pointed out in the 2001 report, the fall of the dot-coms, combined with the economic recession, could have produced immense changes in online use, loss of credibility for the Internet among users, and dismal prospects for new access by non-users. In that environment, it might still have been possible for the Internet to have withered away as just another passing electronic fad.

While the dot-com bust may have deflated some improbable business expectations, the role that the Internet plays in the lives of millions of people is stronger than ever. Not only did the Internet survive the bust of 2000 and 2001, it is regarded by increasing percentages of users as valuable, interesting, and important.

The dot-com economy that once burst forth in a setting of speculative euphoria is now being forced to retrench in a much more realistic atmosphere. How will the Internet continue to evolve in a post dot-com environment? How will the more realistic online opportunities, products, and services that are certain to emerge affect Internet users and their views?

## 2. HAS INTERNET USE PEAKED?

In 2002, the UCLA Internet Project found that about 71 percent of Americans use the Internet, a statistically insignificant change from 2001.

Even though 47 percent of non-users say they are likely to go online in 2003, the flip-side of that positive response means that 53 percent of those who do not go online have no plans to do so in the next year – millions of Americans who are not online and have no plans to use the Internet.

Has Internet use peaked? Will the United States become a society in which about three-quarters of its citizens use a powerful interactive communications tool, while one-quarter does not? If so, what will be the price for voluntarily not using the Internet? Who will be left out of the Internet equation, and what will they miss?

## 3. SHOULD WE REDEFINE THE “DIGITAL DIVIDE?”

Closely related to the possible peaking of Internet use is the question of how we define the “digital divide.”

The “digital divide” was once perceived by politicians and policymakers as a social and educational problem because the Internet was available only to select members of society, leaving behind those with fewer resources or less knowledge.

The digital divide is no longer as simple as it once seemed. Using the narrowest definition of the digital divide – comparing those with zero Internet access to those with any Internet access at all from one or more locations – the divide has indeed narrowed considerably. Studies by the UCLA Internet Project show that online use has increased to include nearly three-quarters of Americans, the vast majority of children have access to the Internet where they live or at school, and more than half of adults use the Internet at work. Is the traditional definition of the digital divide of “haves” vs. “have nots” still valid?

Perhaps a more important measure of the digital divide is exploring how a variety of roadblocks can prevent some people from gaining as much as others from the Internet. Access vs. no access remains an important problem to consider, but other issues may have equal or greater importance in determining who benefits or not from online use: those who have Internet access at home vs. those who do not, those with access by broadband vs. access by telephone modem, those who fear technology vs. those who embrace it, and many other equally relevant factors.

Clearly, the issue of the digital divide needs to be revisited. Creating a new understanding of the digital divide will be a critical issue as the Internet matures.

#### **4. THE INTERNET AT HOME**

While the overall number of online users has flattened – even if only temporarily – the number of users who access the Internet at home continues to increase. In 2002, almost 60 percent of users had access the Internet at home, nearly triple the rate of home use in 1995.

Will use in the home continue to grow? If so, how will this trend affect choices about Internet use?

#### **5. THE INTERNET AS A TOOL FOR POLITICAL POWER – WHEN?**

Each of the three studies conducted by the UCLA Internet Project found that Americans believe the Internet is a powerful information-gathering tool concerning political issues, but a smaller – and declining – number of users believe that the Internet can give them more political power or influence.

Yet this negative perception of the potential for political power and influence is expressed at the same time that public officials increasingly link to their constituencies through their Internet pages or e-mail. Moreover, advocacy groups in growing numbers build civic dialogue and mass expression of opinion through broadcast e-mailings and opportunities for automated responses. At the push of a “reply” button, e-mail users by the millions can voice their views with elected officials and bureaucrats, sending customized messages by e-mail that are tallied and heeded as “snail mail” once was.

In addition, the UCLA Internet Project found that more than one-quarter of e-mail users in 2002 had communicated online with a government official. If the electronic political dialogue is increasing, why is the Internet still viewed by most users as an ineffective tool to create government change or generate political power? When will electronic communication be perceived by voters as a policy-influencing tool?

#### **6. THE IMPACT OF THE INTERNET ON TELEVISION**

When one considers the issue of where Internet users “buy” their time to go online, the answer frequently points at time formerly spent watching television. How will increasing numbers of experienced Internet users – users who spend more time online and less time watching television – affect programming and marketing decisions? How will the shift of time from the passivity of watching television to the interactivity of using the Internet affect American society?

## **7. INFORMATION ON THE INTERNET: RELIABILITY AND ACCURACY**

A troubling dichotomy is becoming increasingly evident with each study by the UCLA Internet Project: the Internet is viewed as a vitally important source of information by new users and very experienced users alike, yet many users do not trust large amounts of the information they find online.

While nearly three-quarters of users consider the Internet to be a very important or extremely important source of information – a ranking higher than for books, television, radio, newspapers, or magazines – only half of users believe that most or all of the information online is reliable and accurate. Even worse, more than one-third of users say that only about half of the information they find online is reliable and accurate.

If the importance of the Internet as an information source is growing, but it continues to be perceived as a source of unreliable information, then a “credibility clash” is looming. How long will the Internet be valued as an important source of information, if what users find online continues to be considered unreliable or inaccurate?

## **8. PRIVACY AND CONCERNS ABOUT CREDIT CARD SECURITY**

The twin problems of online privacy and credit card security plague many aspects of Internet use. Those concerns decline somewhat as Internet use increases, but they nevertheless remain, and can not be overemphasized as an important factor in online purchasing and information exchange.

Will the issues of online privacy and credit card security be addressed more prominently by the financial industry in 2003? There are indications that they will; in 2002, some financial institutions began to use national advertising to address the once-unmentionable issue of credit card fraud in online transactions, using the zero-liability feature of their credit cards as a selling point to attract new customers.

Will these national marketing and other customer awareness programs affect concerns about credit card security online? Will increased understanding about personal information on the Internet help ease user concerns about online privacy?

## 9. BUYING ONLINE: HOW IS IT CHANGING?

The 2002 study of the UCLA Internet Project produced several revealing findings about buying online and the attitudes of purchasers. Consider that:

- While fewer adults bought online in 2002, the number of purchases and the amount they spent increased over 2001.
- Nearly two-thirds of Internet purchasers in 2002 say that online purchasing has reduced their purchasing in retail stores, even though concerns about using credit cards online remain high, and online purchasers do not generally consider the Internet as a source of better prices than traditional “brick and mortar” stores.
- Almost 90 percent of Internet purchasers spend \$15 or more per month online. Is that new purchasing, or growing displacement of traditional retail?
- More than 70 percent of Internet users say their online purchasing will increase, and that number has grown from the 2001 and 2000 studies by the UCLA Internet Project.

In 2002, the use of corporate Web addresses finally became nearly universal in marketing and advertising campaigns; an advertisement without a Web address is now the notable exception. Will the lingering effects of economic downturn affect online purchasing? How will the continuing evolution of buying online affect other retail buying – and how will those changes affect the economy?

## 10. THE RISE OF BROADBAND

Finally, we may find that the most important issues about the Internet are trends that have not yet emerged. Many of these issues may evolve in the transition of Internet access from telephone modem to faster methods on broadband.

In 2002, the UCLA Internet Project found that broadband users spend more time online than telephone modem users in all of the most popular Internet activities. And, more broadband users than telephone modem users consider the Internet an important source of information.

As stated in the introduction to this report, we are particularly interested in tracking the changes that result as Internet users shift from telephone modem connections to broadband. We have only begun to explore the issues and opinions about Internet use that will emerge as faster and more convenient access becomes more commonplace.

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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. It also provides a base for visiting scholars who are engaged in efforts to examine and shape communication policy. The Center's goals include using the vast intellectual resources of 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. In November 2001, the Center released the second UCLA Internet Report. 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](http://www.ccp.ucla.edu).

## SUPPLEMENT 2

## THE WORLD INTERNET PROJECT – INTERNATIONAL CONTACTS

**UNITED STATES (ORGANIZER)**

UCLA Center for Communication Policy  
[www.ccp.ucla.edu](http://www.ccp.ucla.edu)

**CHILE**

P. Universidad Catolica de Chile  
[www.puc.cl](http://www.puc.cl)

**CHINA**

Chinese Academy of Social Sciences  
[www.cass.net.cn/philosophy/CSD/Internetsurvey2000](http://www.cass.net.cn/philosophy/CSD/Internetsurvey2000)

**ESTONIA**

Tartu University  
<http://saba.jrnl.ut.ee>

**FRANCE**

Theseus International Management Institute  
[www.theseus.edu](http://www.theseus.edu)

**GERMANY**

European Institute for the Media  
[www.eim.org](http://www.eim.org)

**GREAT BRITAIN**

Oxford Internet Institute  
<http://www.oii.ox.ac.uk>

**HONG KONG**

City University of Hong Kong  
[www.cityu.edu.hk](http://www.cityu.edu.hk)

**HUNGARY**

Technical University of Budapest  
[www.bme.hu](http://www.bme.hu)

**INDIA**

Indian Institute of Technology, Bombay  
[www.iitb.ernet.in](http://www.iitb.ernet.in)

**IRAN**

Sharif University of Technology  
[www.sharif.ac.ir](http://www.sharif.ac.ir)

**ISRAEL**

University of Haifa  
<http://soc.haifa.ac.il>

**ITALY**

SDA Bocconi, Bocconi University  
[www.sdabocconi.it/oii/](http://www.sdabocconi.it/oii/)

**JAPAN**

Toyo University  
[www.toyo.ac.jp](http://www.toyo.ac.jp)

**KOREA**

Yonsei University  
[www.yonsei.ac.kr](http://www.yonsei.ac.kr)

**MACAU**

University of Macau  
[www.umac.mo](http://www.umac.mo)

**SINGAPORE**

School of Communication Studies  
Nanyang Technological University  
[www.ntu.edu.sg/scs/main/welcome.htm](http://www.ntu.edu.sg/scs/main/welcome.htm)

**SWEDEN**

World Internet Institute  
[www.worldinternetinstitute.net](http://www.worldinternetinstitute.net)

**TAIWAN**

National Chung Cheung University  
[www.ccu.edu.tw](http://www.ccu.edu.tw)

## SUPPLEMENT 3

### RESEARCH METHODS

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

- For the 2002 UCLA Internet Project, interviews were conducted with 2,000 households throughout the 50 states and the District of Columbia.
- For both the original sample drawn in 2000, and the replacement samples selected in subsequent years, 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 or third year were paid a monetary incentive.
- Interviews were conducted in English and Spanish. Interviewing took place between April and June 2002.

- The data was compared to U.S. Census data to ensure that the sample was representative in terms of geographic distribution, race, age, gender, family composition, education, and household income.
- To correct for minor discrepancies between the sample data and Census data, the sample data was weighted. Sample size was preserved during the weighting process.
- The final sample for the 2002 UCLA Internet Study was derived from different sources, and this complicated the weighting procedure. The first portion of the sample consisted of respondents who had participated in the survey in the past. The second portion consisted of a new random sample that was recruited to replace dropouts.
- An examination of the profiles of each of these sample sources revealed differences from the most current U.S. Census results. Moreover, the differences varied depending on the sample source. As a result, the weighting for this year's survey consisted of two separate weighting adjustments, one for respondents that were repeats, the other for newly recruited respondents. Each of the different samples were weighted to correct for its primary sources of deviation from the Census. After this, the two samples were combined.
- The following variables were used in the weighting adjustments, although in different ways for each of the two sample sources: age, gender, education, race, Hispanic origin, and income. In the final weighted, blended sample, the largest deviation from current U.S. Census results occurred in the income category where the weighted total sample had 4.2 percent fewer higher income (greater than \$100,000 a year) respondents. All other deviations were less than 3 percent from Census values.
- The data for the calculations was in most cases calculated to at least eight decimal places, and were then rounded to tenths. As a result, some totals may not add up to precisely 100 percent.

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