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The Digital Future Report 2005  
**Surveying The Digital Future**  
Year Five

*Five Years Of Exploring  
The Digital Domain*



USC Annenberg School  
Center for the  
Digital Future

*Individual Edition*

December 2005

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The Digital Future Report 2005

# Surveying The Digital Future

Year Five

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**The Digital Future Report 2005**  
**Surveying The Digital Future**  
**Year Five**

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## The Digital Future Report 2005

# Surveying The Digital Future

## Year Five

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

The Digital Future Project is a comprehensive, year-to-year examination of the impact of online technology on the United States. This work is part of the World Internet Project, which is organized and coordinated by the USC Annenberg School Center for the Digital Future. Included in the World Internet Project are the Center’s work and partner studies in countries in North America, Europe, South America, and Asia.

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

We created this project because the Internet represents the most important technological development of our generation; its effects may surpass those of television and could someday rival those of the printing press. Had similar 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 changed the world.

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

To achieve this objective, the Digital Future Project surveys 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 users shift from Internet access by modem to broadband (defined as cable, DSL, ISDN or T1/T3).

The Digital Future Project is not restricted to investigating a particular method of accessing the Internet. As new types of access – such as wireless or 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 An Ongoing Study Of The Internet?

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

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

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

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

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

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

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

- **A worldwide effort**

The USC Annenberg School Center for the Digital Future created and organizes the World Internet Project, which includes the Digital Future Project and similar studies in countries worldwide (for contacts of the worldwide partners, see page 120). Through this team of international partners, the World Internet Project studies and compares changes associated with the Internet in different countries and regions, creating an international picture of change in online technology, use, and impact.

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

For this project to be truly effective, we involve public and private organizations that are committed to using our results. We have been allied with an unprecedented array of corporations – several of which are direct competitors – and foundations, including the National Science Foundation, Hewlett-Packard, Accenture, America Online, Time Warner Companies, Microsoft, Merrill Lynch, Sony, Verizon, SBC, Disney, DirecTV, the National Cable Television Association, and the National Cancer Institute.

### **The Digital Future Project: Key Areas**

The fifth Digital Future Report includes findings that compare Internet users to non-users, new users (one year or less online) to very experienced users (more than eight years 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 Digital Future Report for 2005 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 Five of "Surveying the Digital Future," as we work to understand how the Internet is transforming our world.

Jeffrey I. Cole, Ph.D.

Director, USC Annenberg School Center for the Digital Future  
Founder and Organizer, World Internet Project

## Highlights:

# The Digital Future Report 2005 – Year Five

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

The next four years of this study (2001, 2002, 2003, and 2005) have continued the year-to-year appraisal of more than 100 major issues, focusing on Internet users vs. non-users, as well as new users (one year of less of experience) compared to very experienced users (in Year Five, more than eight years of experience).

Here are highlights of the five major areas in Year Five of the Digital Future Project for 2005:

## Highlights: Digital Future Project 2005 -- Year Five

### Internet Users and Non-Users: Who Is Online? Who Is Not? What Are Users Doing Online?

Note: “new users” have less than one year on the Internet  
“very experienced users” have more than eight years on the Internet

#### Internet Access And Use Continues To Increase

- Year Five of the Digital Future Project found increases in the total number of Internet users in the United States, as well as growth in online access at home, at school, and at work; and total number of hours online each week. (Pages 22 , 27, 28 and 29)
- Overall, Internet access rose to its highest level in the five years of the Digital Future Project. In 2005, 78.6 percent of Americans go online. (Page 22 )
- The number of hours online continues to increase – rising to an average of 13.3 hours per week – the highest level in the study thus far. (Pages 22 and 29)
- Almost two-thirds of Americans (66.2 percent) use the Internet at home in 2005, a substantial increase from the 46.9 percent of users who reported home Internet access in 2000, the first year of the Digital Future Project. (Pages 22 and 28)
- More than half of Internet users have been online for more than five years. (Pages 22 and 27)

#### The Top Ten Most Popular Internet Activities -- Year Five

- The top ten most popular Internet activities in 2005 are: e-mail, general Web surfing, reading news, shopping, entertainment news (searching and reading), seeking information about hobbies, online banking, medical information (searching and reading), instant messaging, and seeking travel arrangements and travel information. (Page 23)

#### New Internet Users Vs. Very Experienced Users: Differences In Online Activities

- Year Five of the Digital Future Project found measurable differences between new users and very experienced users in almost every type of Internet activity. (Page 24)

#### Internet Users: Consistent Growth Among Americans Over 55

- Some of the most consistent growth in Internet use is among respondents age 56 and older. (Page 26)

#### The Internet At Home: How Many Hours Per Week?

- Users who go online at home continue to report an increasing number of hours on the Internet. After stabilizing for two years, in 2005 the average weekly hours spent online jumped by almost an hour. (Page 28)

#### Internet Users And Income

- The fastest growing use of the Internet is among Americans with the lowest income. (Page 26)

#### Internet Connections At Home

- In 2005, the telephone modem is no longer the most common type of Internet connection. (Page 31)
- Users who report that they go online through a telephone modem dropped to 45.6 percent, down from 61.5 percent in the previous study. (Page 31)
- Access to the Internet via a broadband connection (defined as cable, DSL, ISDN or T1/T3) is now used by 48.3 percent of users. (Page 31)

### **Broadband And Modem: New Users Vs. Very Experienced Users**

- Broadband use at home is much more common among very experienced users, compared to new users. (Page 32)

### **Broadband Vs. Modem Users: What Do They Do Online?**

- Compared to modem users, broadband users spend more hours online working on their jobs at home, reading news, playing games, tracking their checking accounts and credit cards, and instant messaging. (Page 34)

### **Posting Information Online: Blogs, Photos, And Personal Web Sites**

- The distribution of original content – whether through a blog, display of photos, or maintaining a personal Web page – is on the increase in 2005. (Page 40)
- In Year Five, the highest percentage of users who host a Web site say they post material online in order to sell something. (Page 41)

### **Internet Non-Users: Why Are They Not Online?**

- The 21.4 percent of Americans who do not use the Internet express a range of reasons for not being online, but two of the principal reasons are declining in prevalence. (Page 42)
- In Year Five of the Digital Future Project, the primary reason for not using the Internet continues to be “no computer” – the reason cited most often in each year of the survey. However, the percentage mentioning this reason is down from 2003. (Page 42)
- Those who say that their reason for not being online is the expense of using the Internet dropped by almost half in 2005. (Page 42)

### **Electronic Dropouts: Why Do Users Stop Going Online?**

- In 2005, a lower percentage of electronic dropouts reports their reason for not being online as “no computer available” – the lowest level in the five Digital Future Projects. (Page 43)

### **What Do You Miss By Not Using The Internet?**

- In 2005, the major reasons cited by electronic dropouts in previous years for missing the Internet are being mentioned less often. (Page 44)

### **Will Non-Users Go Online?**

- The number of non-users who say they are somewhat likely or very likely to go online within the next year has increased in Year Five of the study. (Page 45)
- More than one-quarter of electronic dropouts say they will not go back online. (Page 45)

### **Which Communication Technology Would You Give Up?**

- Internet users are more loyal to the Internet than they are to their cell phones or television. (Page 47)
- When asked which technology they would be most willing to give up, in 2005 39.4 percent of Internet users choose their cell phone, and 32.7 percent who would first give up television. Only 27.8 percent of users say they would be most willing to give up the Internet. (Page 47)

## **Media Use And Trust**

### **The Internet: How Important As An Information Source?**

- After five years of studying American online behavior and attitudes, the Digital Future Report continues to find that the Internet has a solid position as the most important source of information for the vast majority of users. (Page 49)
- The Internet grows in importance as use increases. Among very experienced users in 2005, the Internet ranks above all other media as a very important or extremely important source of information. (Page 50)

## **The Internet As An Information Source:**

### **Importance To Broadband Users Vs. Telephone Modem Users**

- Much higher numbers of broadband users than modem users say that the Internet is the top source of information for them. (Page 51)

### **Information On The Internet: Is It Reliable And Accurate?**

- In 2005, the number of users who believe that most or all of the information on the Internet is reliable and accurate continues to decline, now for the third year in a row. (Page 52)

### **Which Web Sites Are Reliable And Which Are Not?**

- In 2005, large numbers of Internet users say that most of the information posted by established media and government Web sites is reliable and accurate, but report much lower levels of credibility for information posted by individuals. (Page 54)

### **Search Engines: Are They Reliable And Accurate?**

- In response to a new question for the Year Five project, large numbers of Internet users say they consider search engines (such as Google, Ask Jeeves, and Yahoo) to be reliable and accurate; 64.4 percent of users say that most or all of the information produced by search engines is reliable and accurate. (Page 55)

### **Internet Users: Media Use While Offline**

- In 2005, the biggest gap in the study of offline activities by Internet users and non-users is time spent watching television. Non-users watch an average of 6.2 hours more television per week than Internet users – yet another piece of evidence that has been consistent in all five years of the study. The only principal social activity that seems to “suffer” from Internet use is TV viewing. (Page 57)

### **Using Media Online**

- The Digital Future Project studies have found a general trend upward in the levels of use of many online media. (Page 58)
- Users spend the largest amount of online time playing computer games, followed by listening to recorded music, reading e-newspapers, listening to Internet radio, reading e-magazines, talking on the telephone, and reading e-books. (Page 58)

### **General Web Surfing**

- A new question for Year Five asked Internet users how often they go online without a specific destination. (Page 59)
- In 2005, Internet users in large numbers (71.3 percent) will sometimes or often go online without a specific destination in mind. Almost one-quarter (24.6 percent) go online often without a specific destination. (Page 59)

### **Search Engines: Are They Providing The Information That Users Seek?**

- Another new question for Year Five asked Internet users if online search engines provide the results they need. A large majority of users (72.3 percent) say that their search engine often provides the results they want. (Page 61)

## **Consumer Behavior**

### **Internet Purchasing: Who is Buying Online?**

- In 2005, the percentage of adults who buy online has remained generally consistent – between 39 and 51 percent – across the five years of the Digital Future Project, with the exception of a modest dip in 2002. (Page 63)

### **Internet Purchasing: How Often Do You Buy Online? How Much Do You Spend?**

- The number of annual purchases by online buyers has tripled from the second year to the fifth year of the Digital Future Project. (Page 63)
- In 2005, online buyers spend an average of \$43 a month more than in 2001. (Page 64)

### **Monthly Spending: Internet Purchases, Mail Order And Phone Orders**

- Buying habits – as measured by the dollar amount of monthly spending – are changing for Internet purchasers, but are stable among those who use mail order and phone order. (Page 65)

### **Why Do Internet Users Delay Their Online Purchasing?**

- When users who postponed buying on the Internet are asked why they delayed their online purchasing, the largest number say they waited because they were concerned about using a credit card number online – a finding consistent through several surveys of the Digital Future Project. (Page 67)
- The number of users in 2005 who delayed their online purchasing because of credit card concerns has declined substantially. (Page 67)

### **Buying Online: How Does It Affect Purchasing In Stores?**

- Online purchasing is having a growing effect on purchasing in traditional retail stores. (Page 68)
- Three-quarters of Internet users who buy online say that the online buying is reducing their purchasing from local retail stores. (Page 68)
- The percentage of online purchasers who say that their retail buying has been “reduced a lot” has reached its highest level in the five years of the Digital Future Project. (Page 68)

### **Browsing For Products: Online And In Stores**

- A higher percentage of Internet users (28.2 percent) say they often shop online and then buy in stores, compared to 11.6 percent who shop in stores and then buy online. (Page 69)

### **Concerns About Privacy When Buying Online**

- The intensity of concern for the privacy of online personal information had been declining in previous years. However, in 2005, concern about the security of personal information rose. (Page 73)
- The percentage who report the highest level of concern (very or extremely concerned) rose in 2005 to more than half of respondents – the first increase in four years. (Page 73)

### **Concerns About Credit Card Information: No End In Sight?**

- As worries about personal privacy online continue, concerns about credit card security on the Internet are also at high levels among all respondents. However, those concerns about credit card security appear to be stabilizing. (Page 77)
- Among Internet users, concerns about the security of credit card information begin to decline somewhat once they begin to buy online. (Page 78)

### **Concerns About Credit Card Information: Why?**

- Although very large numbers of respondents say they are concerned about the online security of their credit card information, the primary reasons for concern cited previously are given less frequently. (Page 80)
- In 2005, the percentage of people concerned about “hackers” has declined by almost two-thirds. (Page 80)

### **What Would Reduce Your Concerns About Using A Credit Card Online?**

- In 2005, 23 percent of adult Internet users who express concerns about using their credit cards online say nothing will reduce their concerns – down from 31 percent in 2003. (Page 81)



## Communication Patterns

### Do You Use E-mail?

- E-mail use continues to be the most popular online activity. The percentage of e-mail users appears to have stabilized. In 2005, about 90 percent of Internet users use e-mail. (Page 84)
- 70.7 percent of Americans now use e-mail. (Page 84)

### How Often Do You Check Your E-mail?

- In 2005, an increasing number of e-mail users are checking their inboxes several times a day or more. (Page 85)

### How Often Should Users Check E-mail?

- When asked how quickly one should reply to personal e-mail, the largest change in Year Five was the increase in users who say that replies should be sent “as soon as possible.” (Page 86)

### Instant Messaging With More Than One Person

- Instant messaging with more than one person is increasing. (Page 88)
- In 2005, of those Internet users who send and receive instant messages, 61 percent IM to more than one person at a time – an increase from 53 percent in 2003. (Page 88)

### Online Communities

- In a new question for the Year Five Report, the Digital Future Project asked respondents about their involvement in online communities. (Page 89)
- The largest number of respondents who participate in online communities say their participation involves a hobby-oriented community. The next largest group reports involvement in an online community focused on social issues, followed by those who participate in a community for professional reasons. (Page 89)
- More than 70 percent (71.9) say that their online community is very important or extremely important for them. Only a very small number (3.6 percent) say their online community is not important at all. (Page 90)

## Social Effects

### The Internet, Family And Friends

#### Does the Internet Affect Contact With Family And Friends?

- In 2005, the majority of Internet users say that the Internet has no influence on the amount of time they spend with their family and friends. (Page 92)
- More than 40 percent say that use of the Internet has increased or greatly increased contact with family and friends. (Page 92)

#### Does The Internet Increase Contact Between People Who Share Interests?

- Only small numbers of Internet users say that going online increases their contact with people who share their interests in hobbies, politics, or religion – findings that are generally consistent with those from previous years. (Page 93)
- A modestly growing number of users say that the Internet has increased their contact with people who share their political interests. (Page 93)

#### Do Internet Users Spend Too Much Time Online?

- Internet users and non-users express moderate levels of agreement that people spend too much time online. However, those levels of agreement have declined in each of the four years this question has been asked by the Digital Future Project. (Page 94)

## Children And The Internet

### The Internet, Children, And Time With Friends

- In general, most adults say that the children in their households spend about the same amount of time with friends since gaining home access to the Internet – a finding consistent throughout the studies of the Digital Future Project. (Page 96)

### Internet Use And Television Viewing: The Right Amount Of Time For Children?

- A small but growing number of adults with children in their households say the children are using the Internet too much. (Page 97)
- Most adults (71.8 percent) say that children in their households spend just the right amount of time online – a slight decline over the previous year. (Page 97)
- Almost half of adults (48.4 percent) say that children in their households spend too much time watching television – a number that has increased steadily over the last four years of surveys. (Page 97)

### Schoolwork And The Internet

- In 2005, children and adults express conflicting views about the importance of the Internet in schoolwork. Internet users age 18 and under believe that the Internet plays a major role in their schoolwork. However, the Internet is still not perceived by large numbers of adults as having any effect – positive or negative – on school grades. (Pages 98 and 99)

## Political Power And Influence

### The Internet's Importance In Political Campaigns

- In 2005, large numbers of respondents (61.7 percent) agree that the Internet has become important to political campaigns. (Page 103)
- More than half of non-users (52 percent) also agree that the Internet is important for political campaigns. (Page 103)

### The Internet and Political Knowledge

- In 2005, belief that the Internet can be a tool for learning about the political process continues to increase, with 60.4 percent of users and 34.6 percent of non-users agreeing that by using the Internet, people can better understand politics. (Page 104)

### Is The Internet A Tool To Help Gain Political Power?

- For the first time in the Digital Future Project, the number of Internet users who say that the Internet can be used as a tool to gain political power has begun to rise. (Page 105)

### Online Information And The Presidential Elections

- Large percentages of Internet users went online for information about the candidates in the 2004 presidential election – for information about issues or candidates they supported, as well as for information about issues and candidates about which they were undecided. (Page 106)

### Where Online Do Users Find Campaign Information?

- Internet users use candidates' Web sites for information, but not as their primary source for campaign information. (Page 107)
- The largest percentage of adult users who went online for campaign information relied on traditional media Web sites; a smaller group of users used candidates' Web sites. (Page 107)

## The Internet At Work

### Using The Internet At Work: Hours Online

- Use of the Internet at work for professional reasons is increasing. (Page 108)

### The Internet At Work: Personal Use

- Of users who have Internet access at work, 10.7 percent say they cannot visit non-work Web sites from their business computer. (Page 109)
- Of the other 89.3 percent of users who can visit non-work Web sites from their business computer, the vast majority go online for 3.5 hours per week or less for non-work purposes – a level that remained generally consistent for three years, but dropped slightly in Year Five. (Page 109)

### Does The Internet Make Workers More Productive?

- The percentage of users who say the Internet at work makes them more productive has continued to increase for all five years of this study. (Page 110)

## The Internet And Military Life

### Armed Forces Personnel And Online Technology: Key Points

- The Internet is playing an increasingly important role in the social lives of military personnel. The role of the Internet among military personnel, and their family and friends, is becoming a key issue.
- 31.8 percent of respondents say that they themselves, or a member of the family, or a close friend, are in the military.
- Almost one-fourth of respondents say that the member of the military in question is deployed overseas in a battle area.
- A majority of people in the military communicate with their family or friends back home by e-mail or cell phone. (Page 111)

## Trends: Five Years Of Exploring The Digital Domain

### Top Issues

- The conclusions of Year Five of the Digital Future Project focused on nine trends: the Internet, expense, and non-users; the growing impact of broadband; surfing the Web; the Internet and politics; Internet vs. retail; original online content; Internet credibility; the military and the Internet; and the speed of change. (Page 112)

\* \* \* \* \*

THE DIGITAL FUTURE REPORT

# Surveying the Digital Future

YEAR FIVE

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

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

For trends in this year's findings, see page 112.

# Internet Users And Non-Users

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

Who went online in Year Five of the Digital Future Project? How did the experiences of users and non-users differ?

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” (more than eight years on the Internet)?

\* \* \* \* \*

Year Five of the Digital Future Project found increases in the total number of Internet users in the United States, as well as growth in online access at home, at school, at work, and total number of hours online each week.

- Overall, Internet access rose to its highest level in the five years of the Digital Future Project. In Year Five, 78.6 percent of Americans age 12 and older go online.
- The number of hours online continues to increase – rising to an average of 13.3 hours per week – the highest level in the study thus far.
- Almost two-thirds of Americans (69.2 percent) use the Internet at home, a substantial increase from the 46.9 percent of users who reported home Internet access in 2000, the first year of the Digital Future Project.

As Internet access and hours online continue to increase, how are online habits changing in America?

## Internet Access And Use

Year Five of the Digital Future Project found continued growth in the number of hours online, Internet access at home, and the number of respondents with the Internet at work.

Project Year	2000	2001	2002	2003	2005
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### Internet Access

■ Total Americans who use the Internet*	66.9%	72.3%	71.1%	75.9%	<b>78.6%</b>
■ Total Americans who use the Internet at home	46.9%	58.4%	59.3%	65.1%	<b>66.2%</b>
■ % of students who use the Internet at school	55.4%	64.3%	62.6%	62.1%	<b>77.1%</b>
■ Internet users with e-mail	n/a	87.9%	89.9%	92.5%	<b>89.9%</b>
■ % who use the Internet at work outside the home	42.3%	51.2%	51.2%	57.5%	<b>61.5%</b>

(\* The total number of Americans who use the Internet includes users age 12 and older who connect from all locations, including home, work, school, cafes, libraries, other people's homes, cell phones, PDAs, and anywhere else one might access the Internet.)

### Hours Online

■ Average numbers of hours online per week	9.4	9.8	11.1	12.5	<b>13.3</b>
■ Hours online per week from home, Year Five (new users)*					<b>3.6</b>
■ Hours online per week from home, Year Five (very experienced users)*					<b>11.2</b>
■ Hours of active Internet use per week at work	n/a	4.6	5.5	4.9	<b>5.6</b>

\* "new users" = less than one year using the Internet  
 "very experienced users" = more than eight years on the Internet

### Number Of Years Online – Year Five

■ One year or less	<b>5.5%</b>
■ More than one year to three years	<b>14.6%</b>
■ More than three years to five years	<b>25.1%</b>
■ More than five years to eight years	<b>28.4%</b>
■ More than eight years	<b>26.4%</b>

Average years of Internet experience for all respondents in Year Five: 5.3 years

Project Year	2000	2001	2002	2003	2005
<b>Online Purchasers (All Respondents)</b>					
■ Online purchasers (percentage of Internet users)	n/a	48.9	38.2	39.4	<b>42.8</b>
■ Average number of purchases (annually)	n/a	11.0	29.0	29.6	<b>34.6</b>
■ Average dollars spent online (monthly)	n/a	\$71.30	\$83.75	\$95.02	<b>\$104.29</b>

### Online Spending Per Month (All Respondents)

■ Less than \$15	n/a	36.2%	10.9%	11.5%	<b>6.4%</b>
■ \$15-\$175	n/a	55.4%	75.7%	72.1%	<b>74.0%</b>
■ Greater than \$175	n/a	8.4%	13.4%	16.4%	<b>19.6%</b>

### The Top Ten Most Popular Internet Activities -- 2005

(Percentage of people age who report online weekly time with these activities; multiple answers included)

1. E-mail (reading and writing)	86.5%
2. General Web surfing or browsing	77.5%
3. Reading local, national and international news	59.8%
4. Shopping for or buying goods or services	52.7%
5. Reading or searching for information about entertainment	52.4%
6. Hobbies	49.2%
7. Online banking*	42.6%
8. Reading or searching for medical information	42.3%
9. Sending or receiving instant messages	39.3%
10. Making travel arrangements and getting travel information	39.0%

\* Keeping track of checking accounts, credit cards, or savings accounts, Internet users 18 and older

### **New Internet Users Vs. Very Experienced Users: Differences In Online Activities**

In the five surveys conducted by the Digital Future Project, some of the most interesting findings are found by comparing what new Internet users and very experienced users do online.

(For Year Five of The Digital Future Report in 2005, “new users” are respondents who go online for one year or less, while “very experienced users” have been using the Internet for more than eight years.)

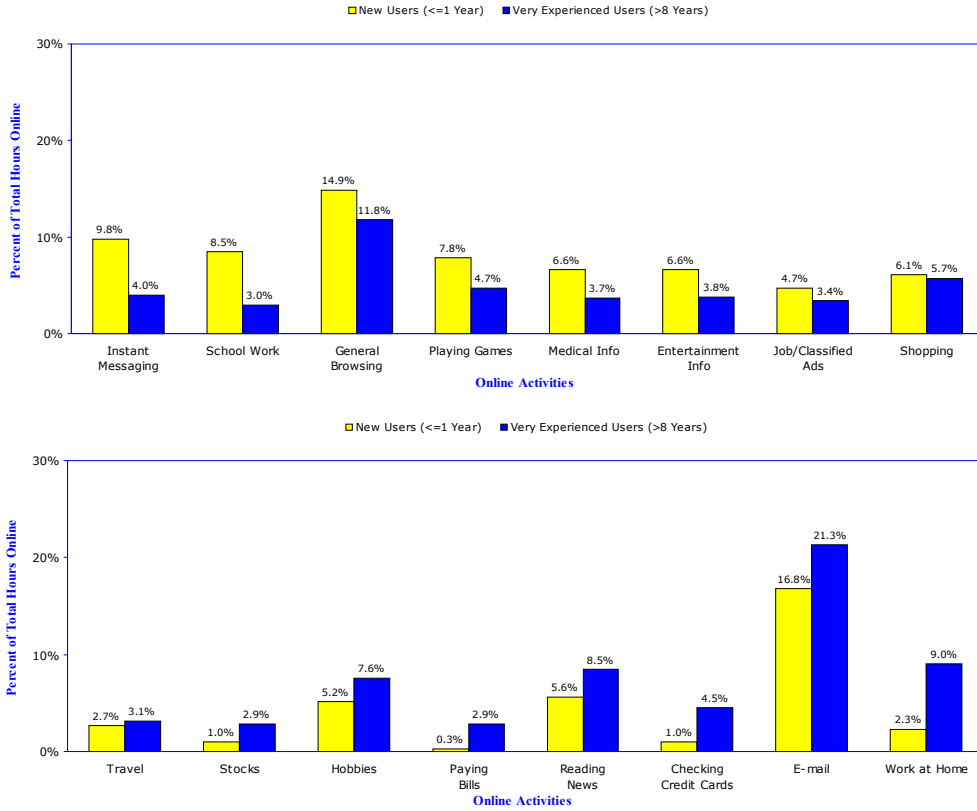
In 2005, very experienced Internet users spent by far the largest percentage of their time online dealing with e-mail, followed by general Internet browsing; the next highest categories of use were work at home for their jobs, reading news, and seeking information about hobbies.

New users also spent the largest percentage of their Internet time with their e-mail and general online browsing. However, the next highest categories for new users are sending and receiving instant messages – at levels much higher than for experienced users – followed by playing games, and seeking information about medical issues and entertainment.

Year Five of the Digital Future Project found measurable differences between new users and very experienced users in almost every type of Internet activity. The very experienced users go online at higher levels to read e-mail, work at home, read news, and engage in hobbies. New users report much higher levels of instant messaging, school-related work, and playing games.



**Internet Use: Activities**



Note: For this question, the base is all Internet users, with the exception of:

- \* Work at home for your job = Internet users who are employed
- \* Paying bills using the Internet = Internet users age 18 and older
- \* Keeping track of checking or credit card or savings accounts on the Internet = Internet users age 18 and older
- \* Trading, checking value, researching stocks, bonds, or mutual funds = Internet users age 18 and older
- \* School work = Internet users who are students

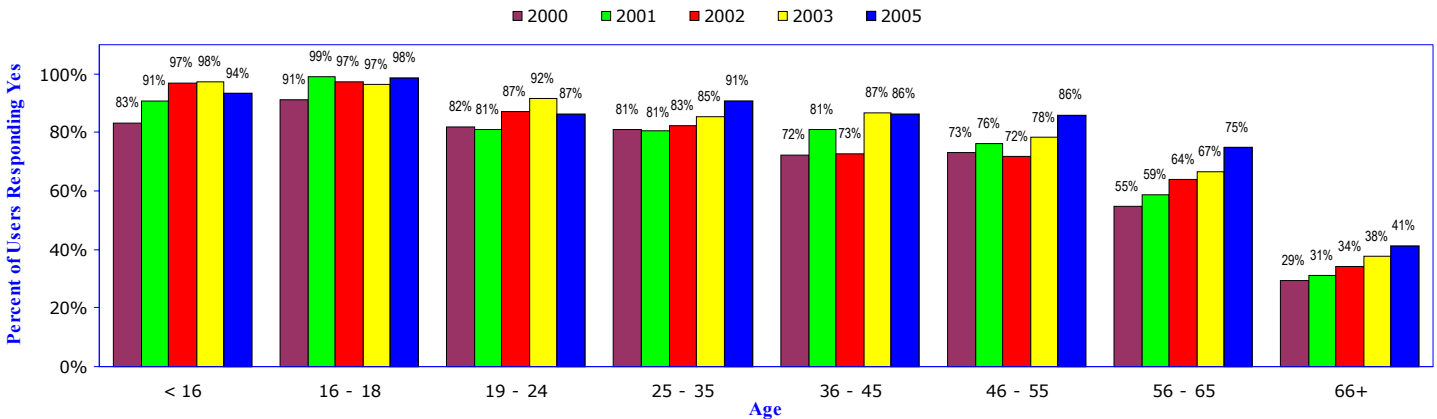
**Internet Users: Across All Age Ranges**

Five years of studies by the Digital Future Project have identified important trends in the relationship between Internet use and age.

As in previous studies, in Year Five the highest levels of Internet use are for those age 24 and under, with use among those age 18 and under approaching 100 percent.

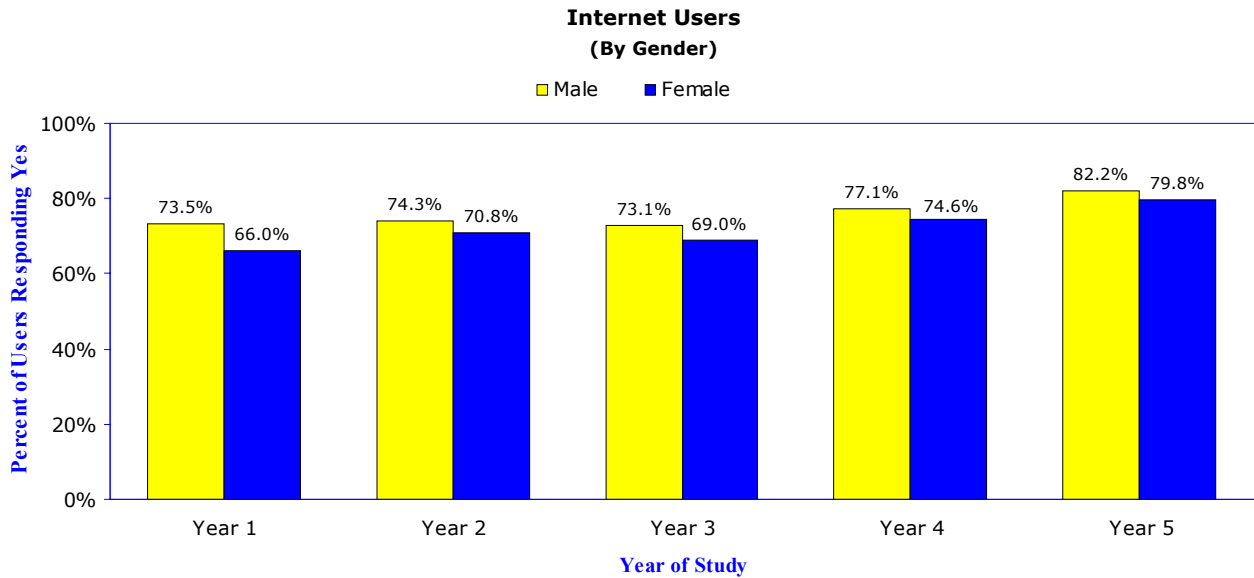
In addition, some of the most consistent growth in Internet use is among respondents age 56 and older. For instance, among users 56 to 65, Internet use has increased from slightly more than half (55 percent) in 2000 to nearly three-quarters (74.9 percent) in 2005.

**Internet Use  
(By Age)**



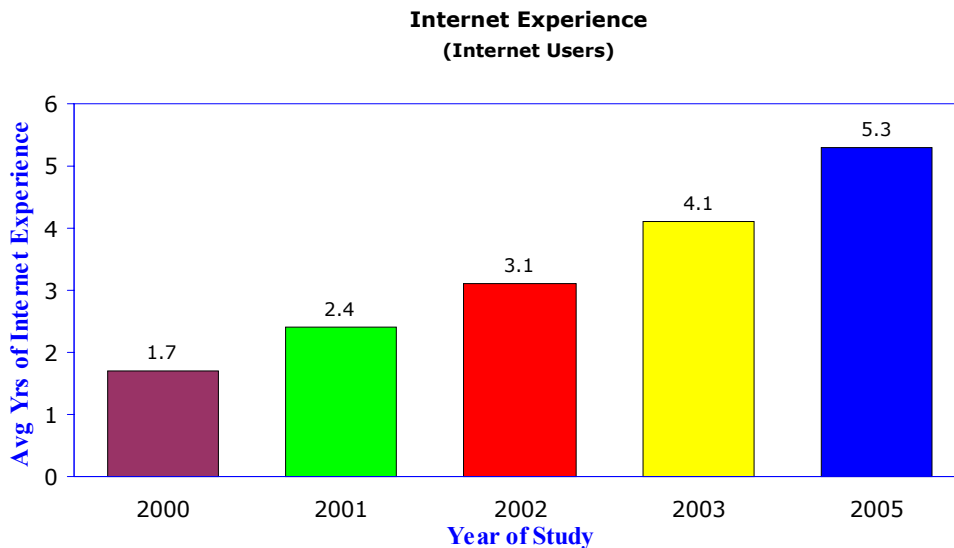
### Men And Women Online

In each of the five studies conducted by the Digital Future Project, men and women in almost equal numbers use the Internet, with a marginally higher percentage of men going online.



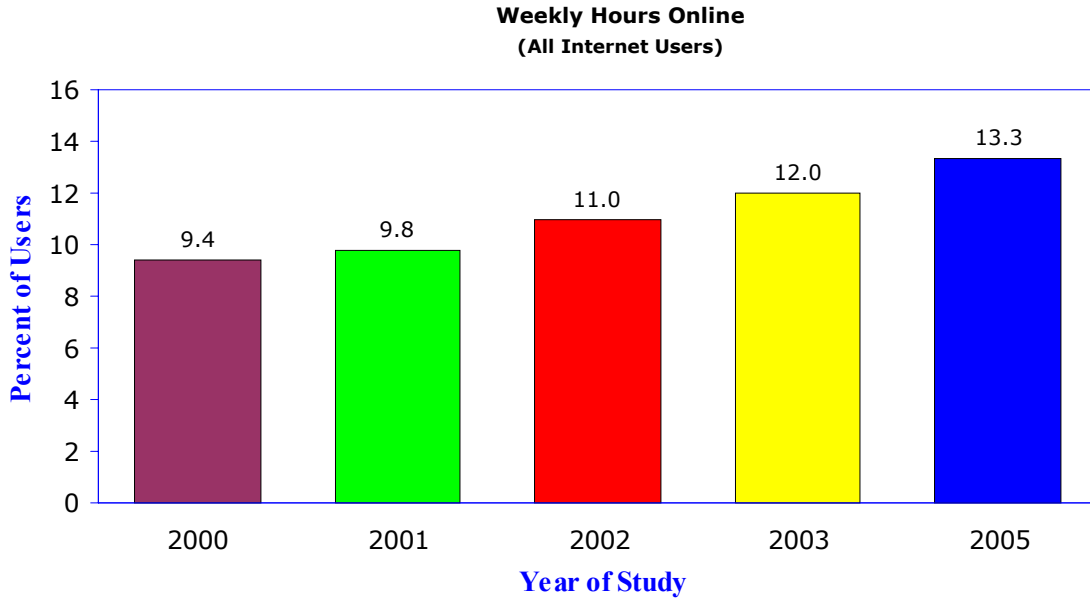
### Internet Use: How Many Years Online?

The average years of Internet experience has risen in each year of the Digital Future Project. In 2005, Internet experience has reached an average of 5.3 years.



## How Long Are Users Online?

The average number of hours online per week continues to grow in 2005. This year, users report an average of 13.3 hours online per week, up from 9.4 hours in 2000.

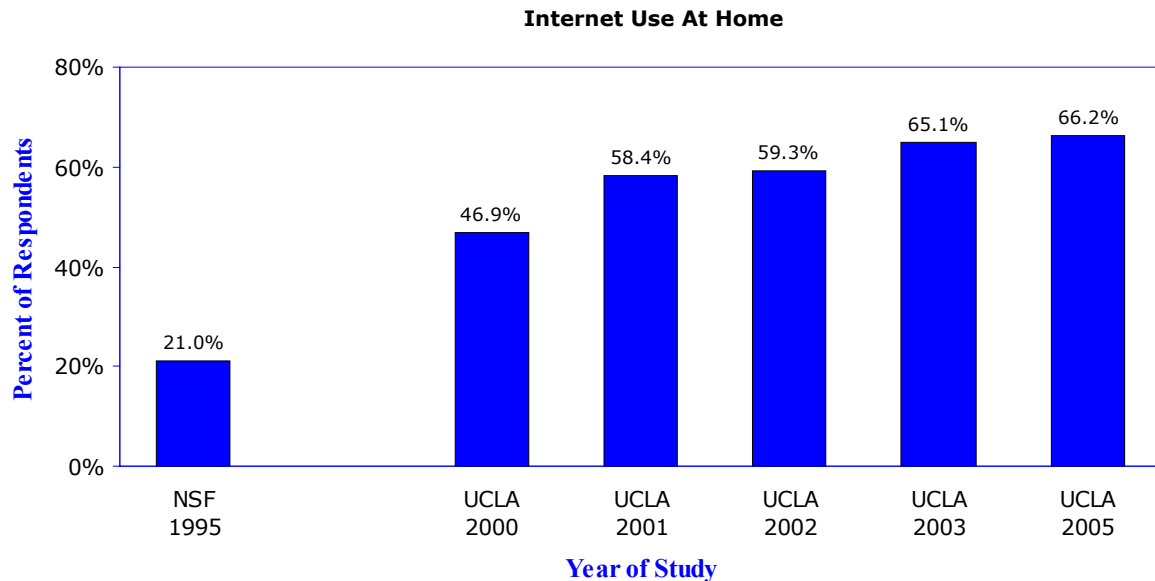


## Using The Internet At Home

Use of the Internet at home continues to increase.

A 1995 report by the National Science Foundation showed that only about one-fifth of users had access to the Internet at home. Five years later, the first study by the Digital Future Project found that home access had increased to 46.9 percent of users.

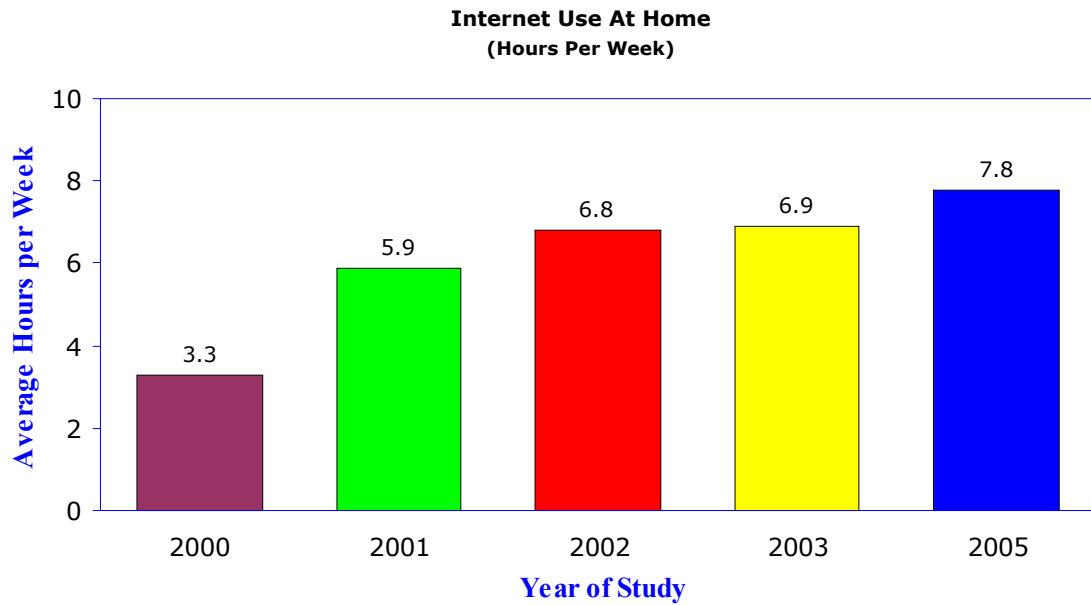
In 2005, home access has increased to 66.2 percent of American households.



## The Internet At Home: How Many Hours Per Week?

Users who go online at home continue to report an increasing number of hours on the Internet.

After stabilizing for two years, in 2005 the average weekly hours spent online jumped by almost an hour.

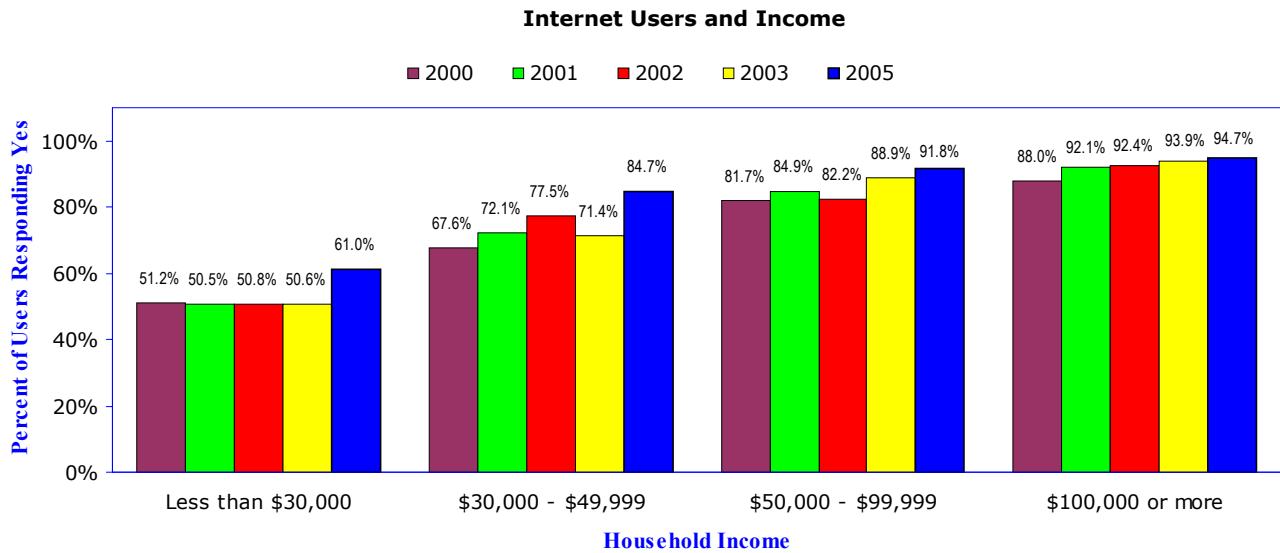


The growth of broadband at home (defined as cable, DSL, ISDN or T1/T3) raises questions about the relevance of tracking the number of hours spent online at home. For more about this issue, see the Trends section on page 112.

**Internet Users And Income**

Many studies of the Internet have identified a relationship between income and Internet use; typically, the higher the respondents' income, the more likely they are to use the Internet.

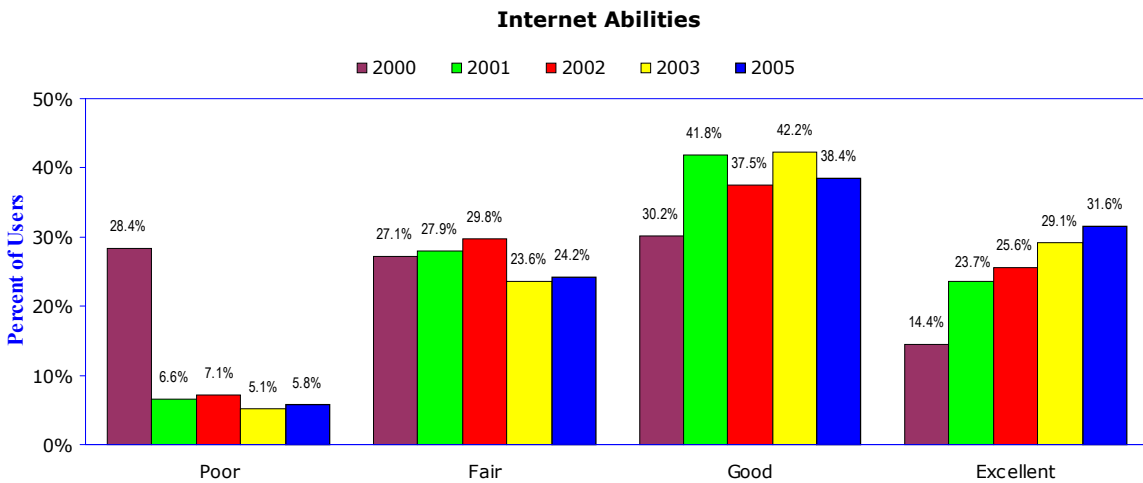
That finding is consistent in Year Five of the Digital Future Project; in 2005 Internet use tops 90 percent among users who earn \$50,000 or more. However, of special note is the growth in Internet use among users who earn under \$50,000 – and especially among users who earn less than \$30,000. The fastest growing use of the Internet is among Americans with the lowest income.



### How Do You Rate Your Ability To Use The Internet?

The confidence of Internet users in their online abilities has continued to increase in each of the five years of the Digital Future Report.

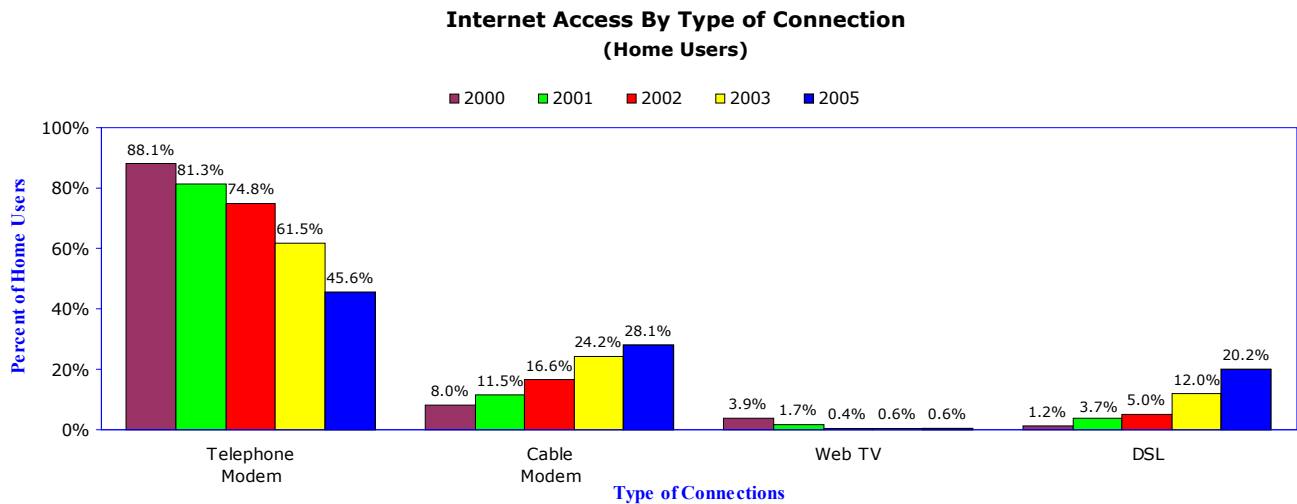
In Year Five, 31.6 percent rate their online ability as excellent – more than double the percentage giving themselves this rating in the first year of this study in 2000 (14.4 percent).



### Internet Connections At Home

In 2005, the telephone modem is no longer the most common type of Internet connection.

Users who report that they go online through a telephone modem dropped to 45.6 percent, down from 61.5 percent in the previous study. At the same time, access to the Internet via a broadband connection (in this chart defined as cable or DSL) continues to rise, and is now used by 48.3 percent of users.



(Multiple categories possible)

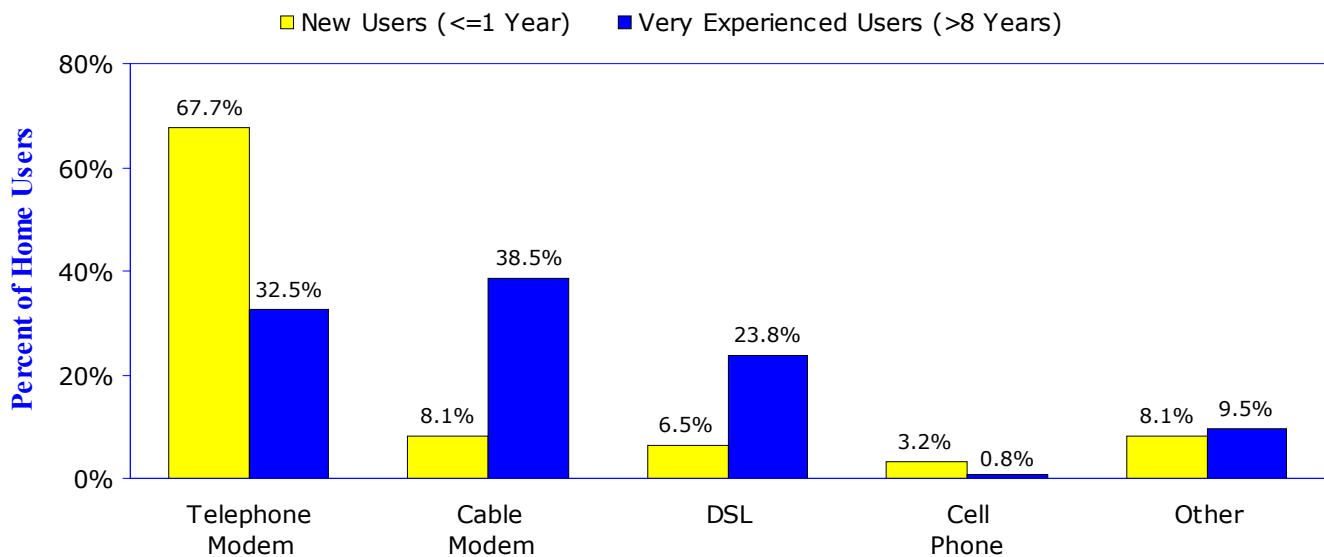
## Broadband And Modem: New Users Vs. Very Experienced Users

Broadband use (defined as cable, DSL, ISDN or T1/T3) at home is much more common among very experienced users, compared to new users.

In 2005, almost two-thirds of very experienced users (62.3 percent) go online at home through a broadband connection (in this chart, either cable or DSL). Less than one-third (32.5 percent) of very experienced users still go online through a telephone modem.

Most new Internet users go online through a telephone modem. More than two-thirds of new users (67.7 percent) access the Internet at home through a telephone modem; only 14.6 percent of new users have a broadband connection at home.

**Internet Access By Type of Connection  
(New Users Vs. Very Experienced Users)**



(Multiple categories possible)

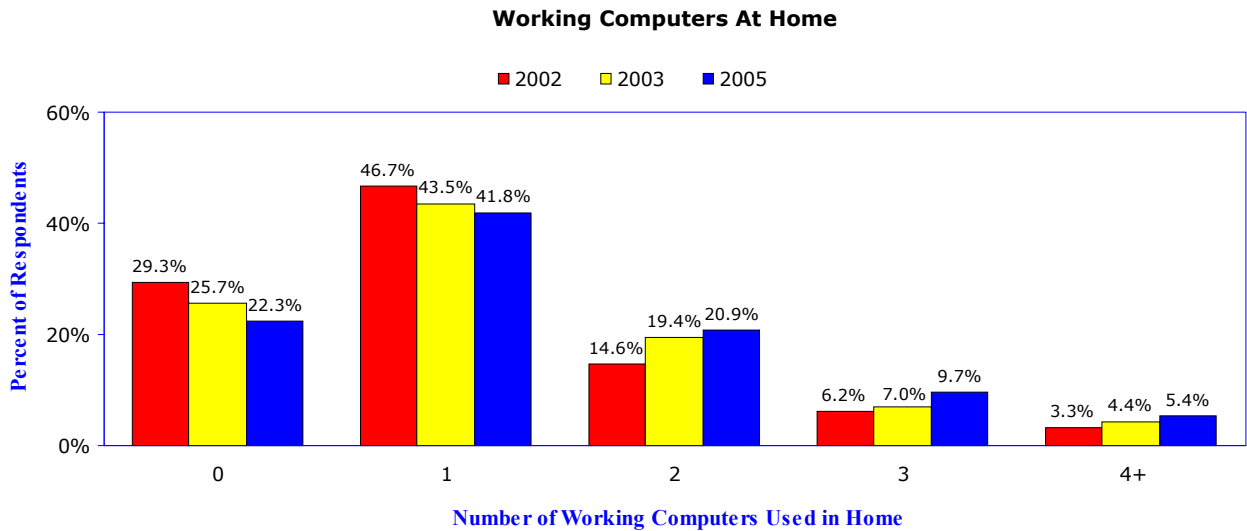
Other = Web TV, Wireless (such as PDAs), Satellite, ISDN, T1/T3



### How Many Working Computers At Home?

In Year Five of the Digital Future Project, the number of American homes that have more than one working computer continues to increase.

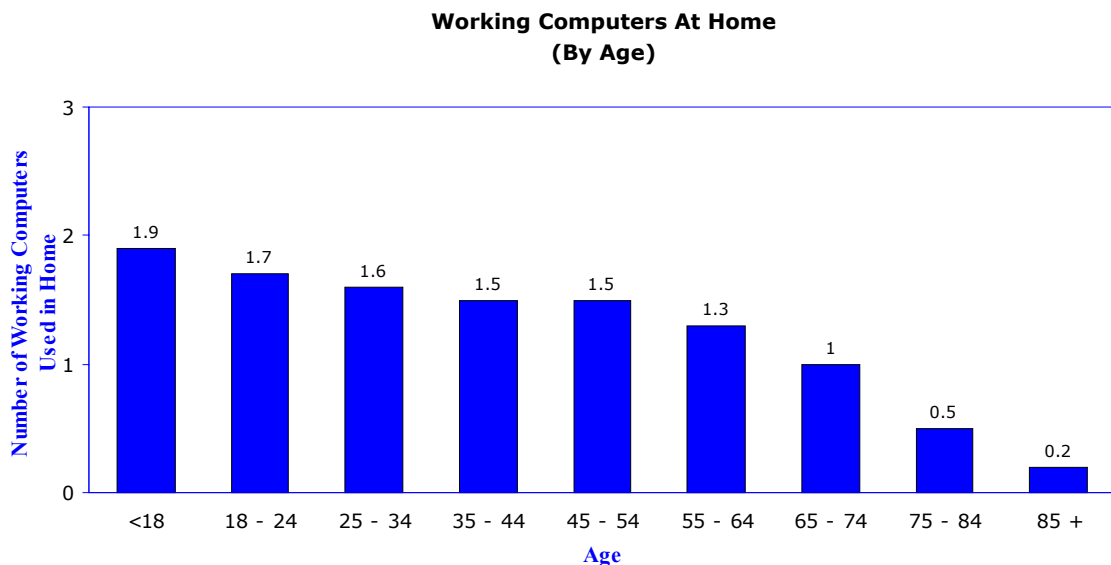
In 2005, more than one-third (36 percent) of American households have more than one computer, up from 30.8 percent in 2003, and 24.1 percent in Year 2002.



### Working Computers At Home: By Age

Households with children tend to have more computers.

The households with respondents under age 18 had the largest number of computers: an average of almost two per household. The average number of computers in the household declines steadily as the age of the respondents increases.



### **Broadband Vs. Modem Users: What Do They Do Online?**

In 2005, how does use of broadband (defined as cable, DSL, ISDN or T1/T3) affect time spent on online activities?

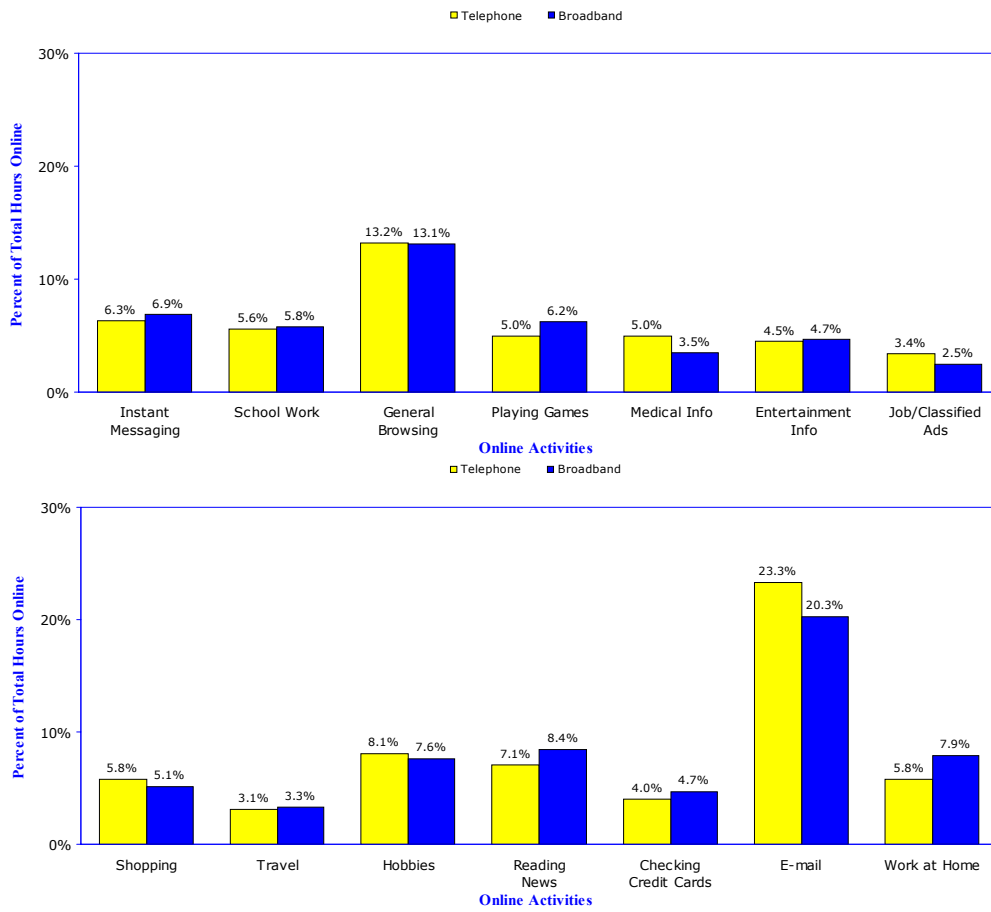
Compared to modem users, broadband users spend more hours online working on their jobs at home, reading news, playing games, tracking their checking accounts and credit cards, and instant messaging.

Compared to broadband users, modem users spend more hours online shopping, searching for jobs and classified ads, sending and reading e-mail, seeking information on hobbies, Web browsing, schoolwork, and looking for medical information.

Broadband users and modem users spend almost the same amount of time online with entertainment information, travel information and reservations, school-related work, and general Internet surfing.

What are the two biggest gaps between broadband users and modem users in time spent online? Broadband users spend more online time working at home; modem users spend more online time reading and writing e-mail.

**Online Activities  
(Broadband Access Vs. Telephone Modem Access)**



Note: For this question, the base is all Internet users, with the exception of:

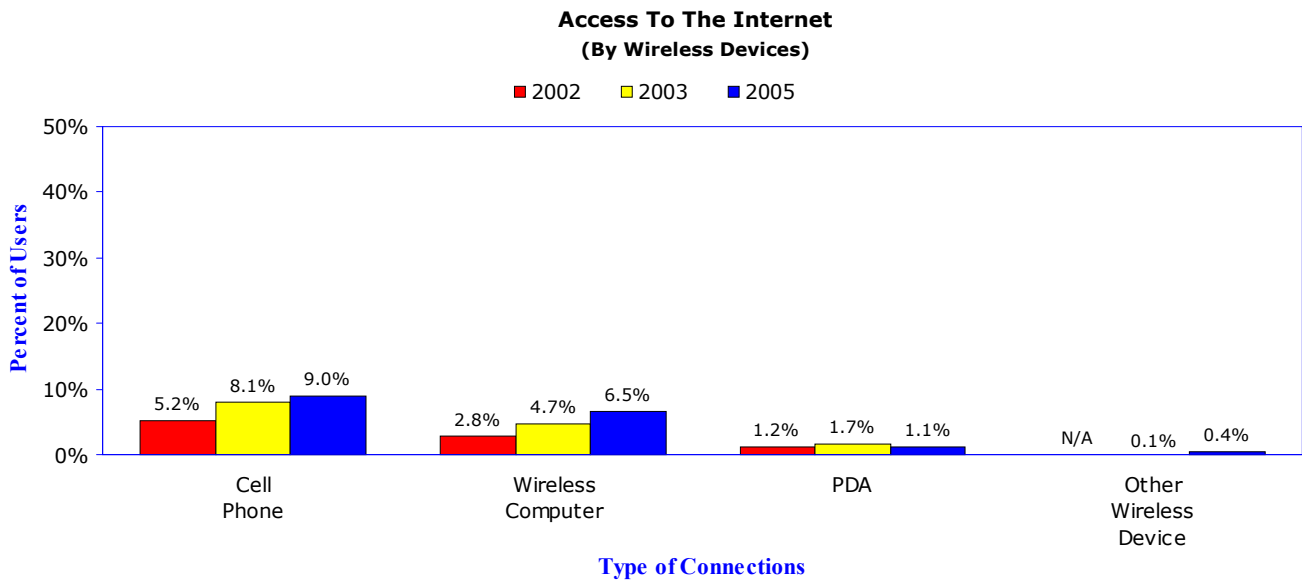
- \* Work at home for your job = Internet users who are employed
- \* Paying bills using the Internet = Internet users age 18 and older
- \* Keeping track of checking or credit card or savings accounts on the Internet = Internet users age 18 and older
- \* Trading, checking value, researching stocks, bonds, or mutual funds = Internet users age 18 and older
- \* School work = Internet users who are students

### Wireless Devices And Access To The Internet

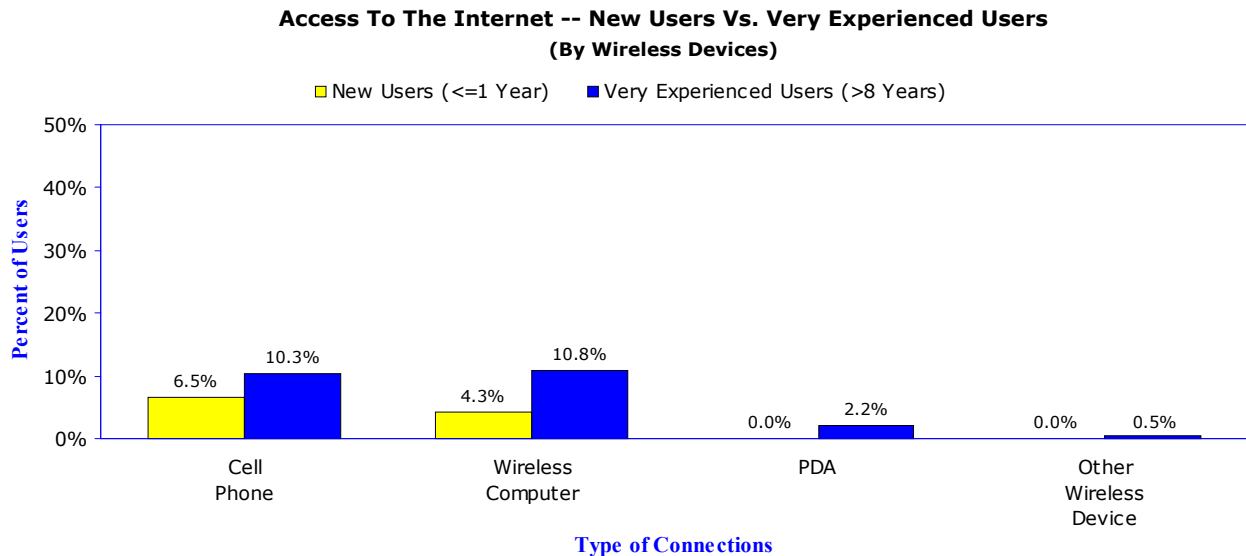
The use of wireless devices – cell phones, computers equipped with wireless cards, and PDAs – is increasing.

Although almost 80 percent of Internet users (79.2 percent) use only wired access, an increasing number of respondents say they access the Internet through wireless devices.

In 2005, 22.1 percent of respondents say they access the Internet through a wireless device, up from 14.5 percent in the previous study.



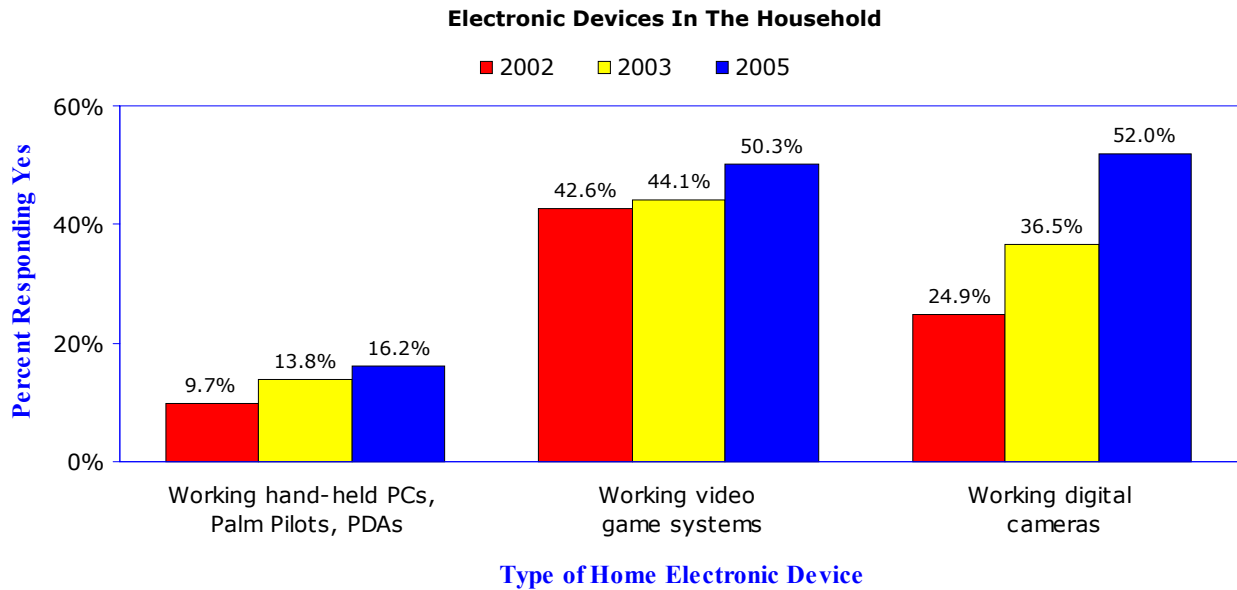
Very experienced users rely on all types of wireless devices more than new users.



### Electronic Devices In The Home: PDAs, Video Games, Digital Cameras

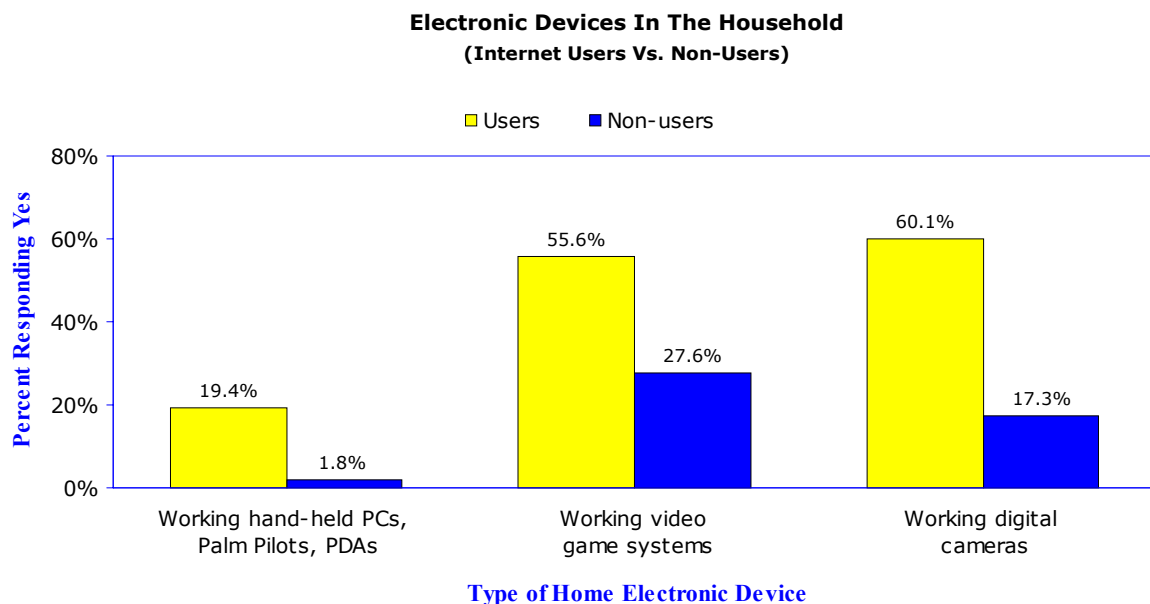
In addition to devices that provide wireless Internet access, American households are buying growing quantities of other electronic technology that complements online use, including PDAs, video games systems, and digital cameras.

The growth of digital cameras is particularly notable – more than double in three years – while acquisition of PDAs and video game systems continues to grow.



### Electronic Devices in The Home: Internet Users Vs. Non-Users

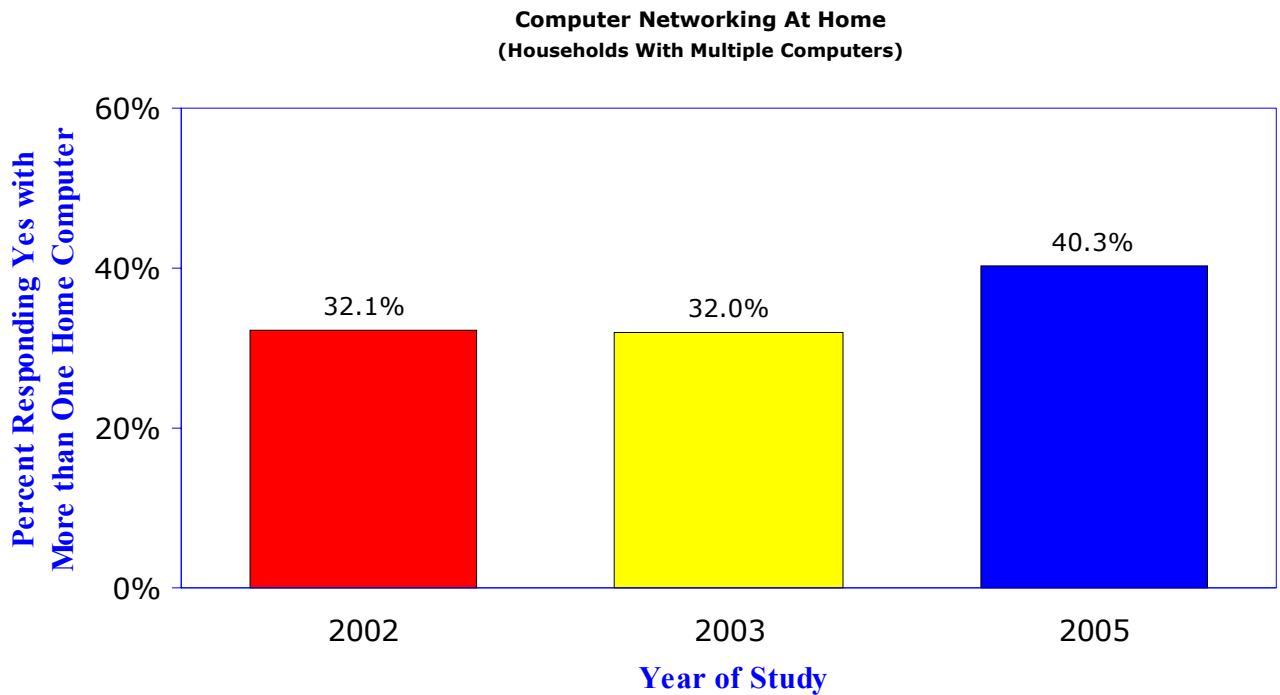
Perhaps not surprisingly, there is a distinct gap between Internet users and non-users in their acquisition of electronic devices, with far more users than non-users buying new electronics.



## Home Networking

Year Five of the Digital Future Project found significant growth in home networking.

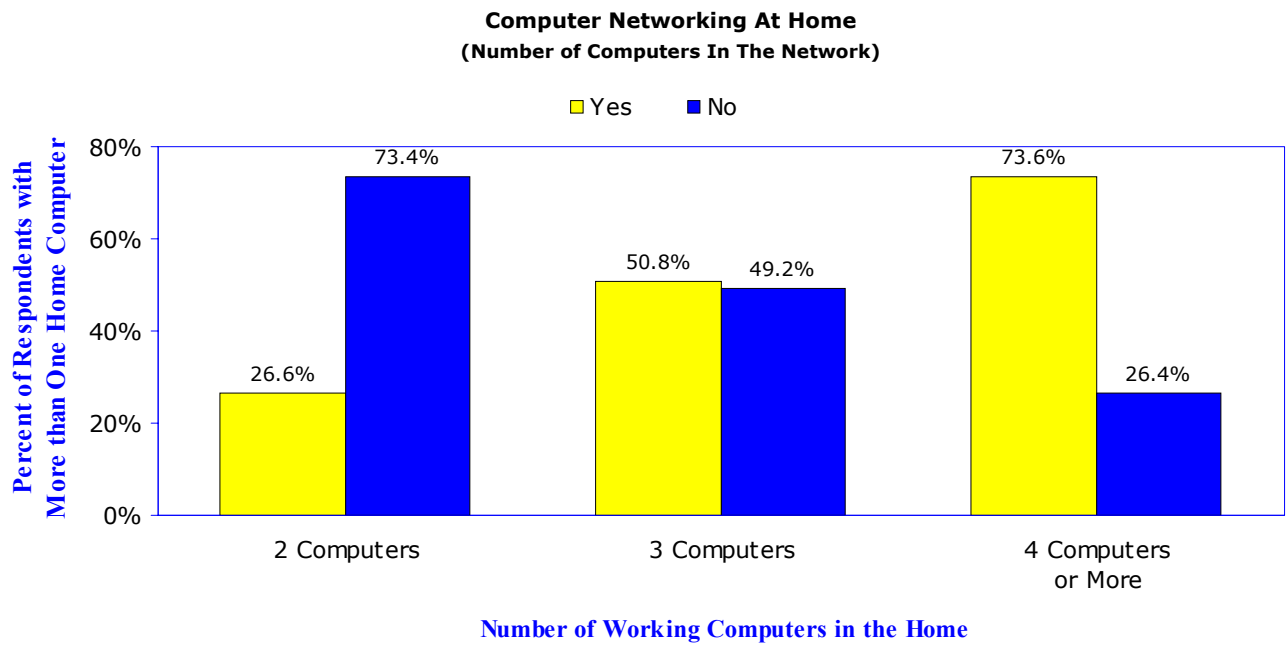
In 2005, after remaining stable for two years, the number of respondents who say that the two or more computers in their households are networked to each other has grown in the current study. That number has now grown to more than 40 percent of homes with multiple computers.



### Home Networking: How Many Computers?

The percentage of all households that have networked their computers has increased – even within those homes with only two computers.

In 2005, nearly three-quarters of households with four or more computers (73.6 percent) say their computers are on a home network.



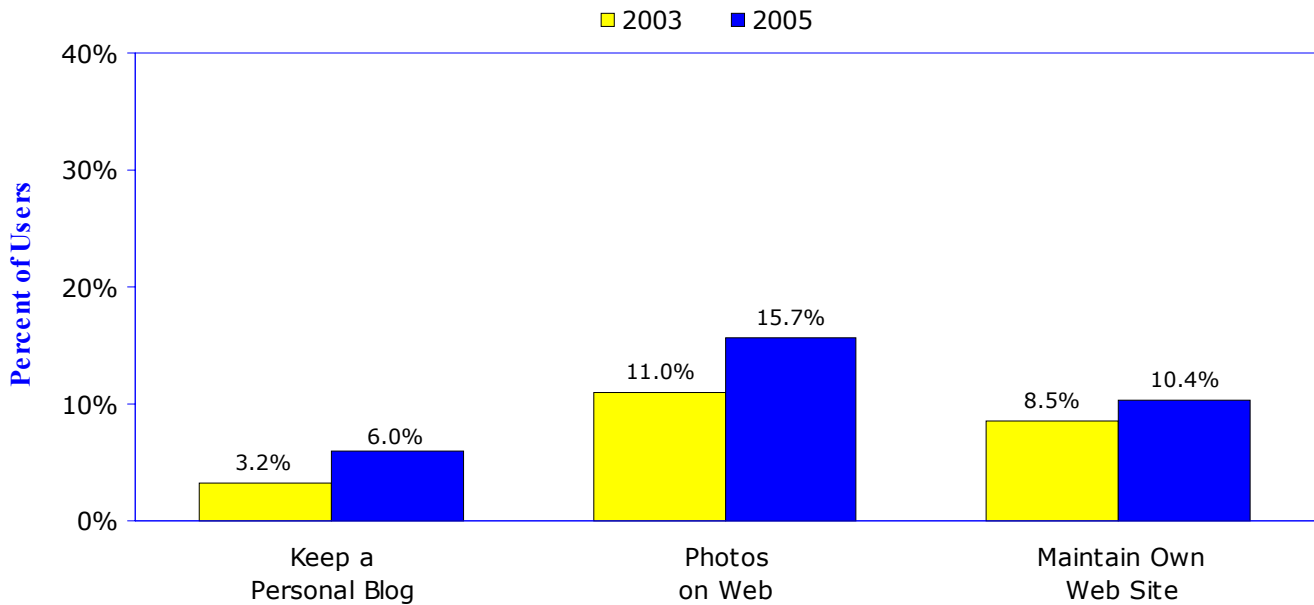
### Posting Information Online: Blogs, Photos, And Personal Web Sites

The distribution of original content – whether through a blog, display of photos, or maintaining a personal Web page – is on the increase.

In 2005, Internet users in growing numbers report that they post original content. The largest number say they post their photos online.

For more about blogs, see the Trends section on page 112.

**Do You Keep A Personal Blog, Display Photos On The Web, Or Maintain Your Own Web Site?  
(Internet Users)**

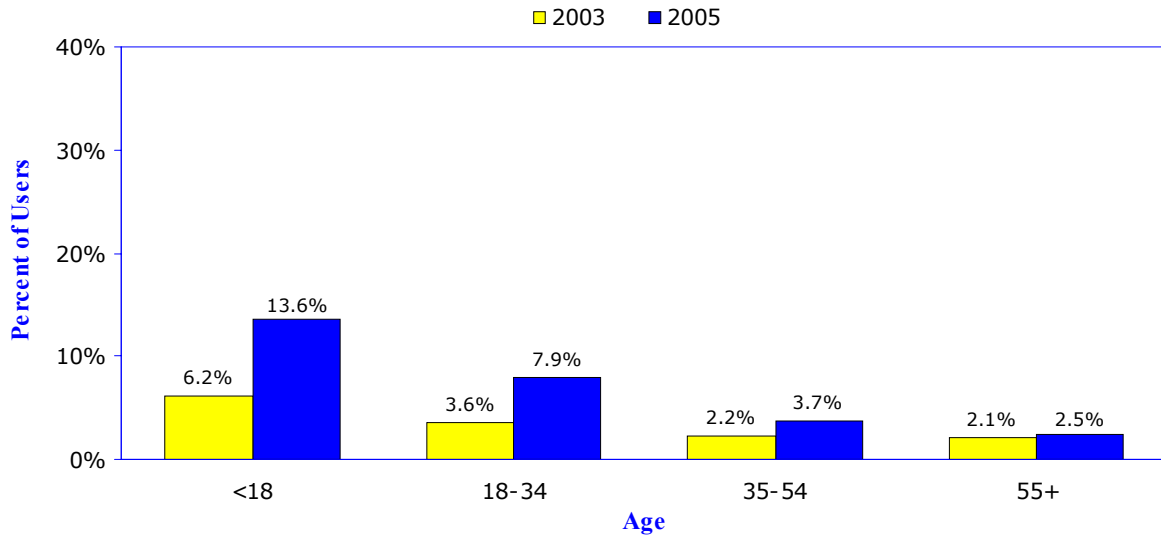




### Posting Information Online: By Age

Internet users under 18 comprise the largest group of users who post information online.

**Do You Keep A Personal Blog, Display Photos On The Web, Or Maintain Your Own Web Site?  
(Internet Users By Age)**

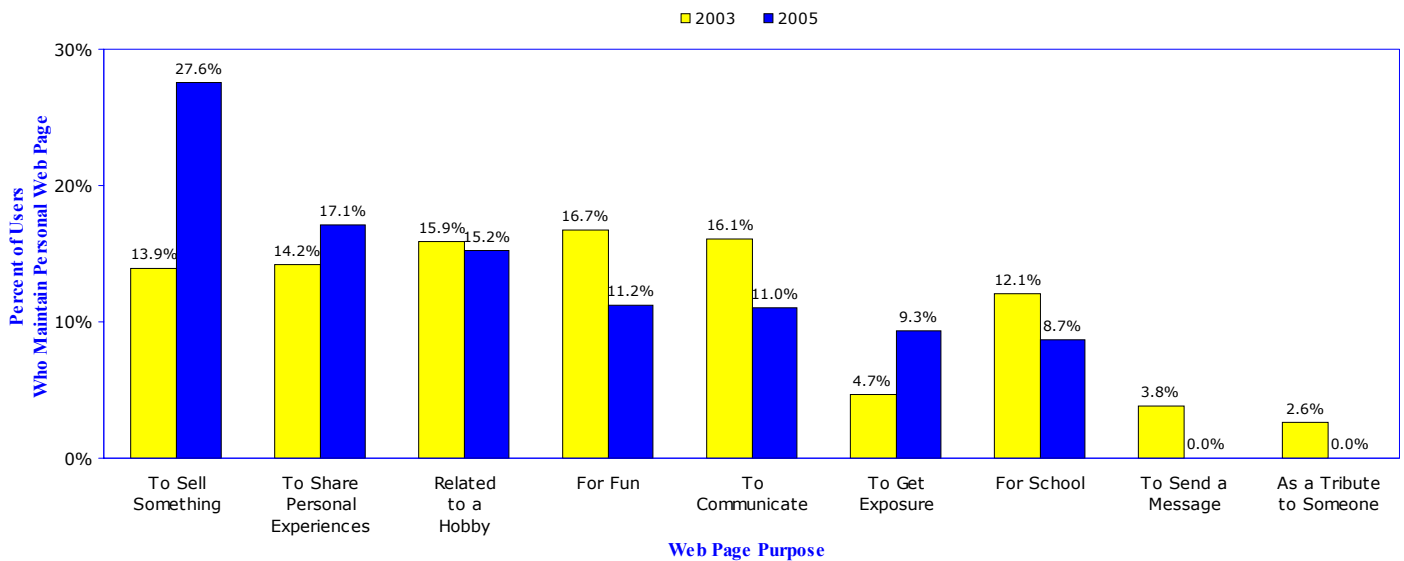


### Personal Web Sites: What Do Users Post Online?

The reasons given by users for posting personal Web pages reveals real growth in online entrepreneurship.

In 2005, the largest percentage of users who host a Web site say they post material online in order to sell something. Other reasons that have increased include sharing personal experiences and gaining exposure online.

**What Is The Main Purpose Of Your Web Site?**



### Internet Non-Users: Why Are They Not Online?

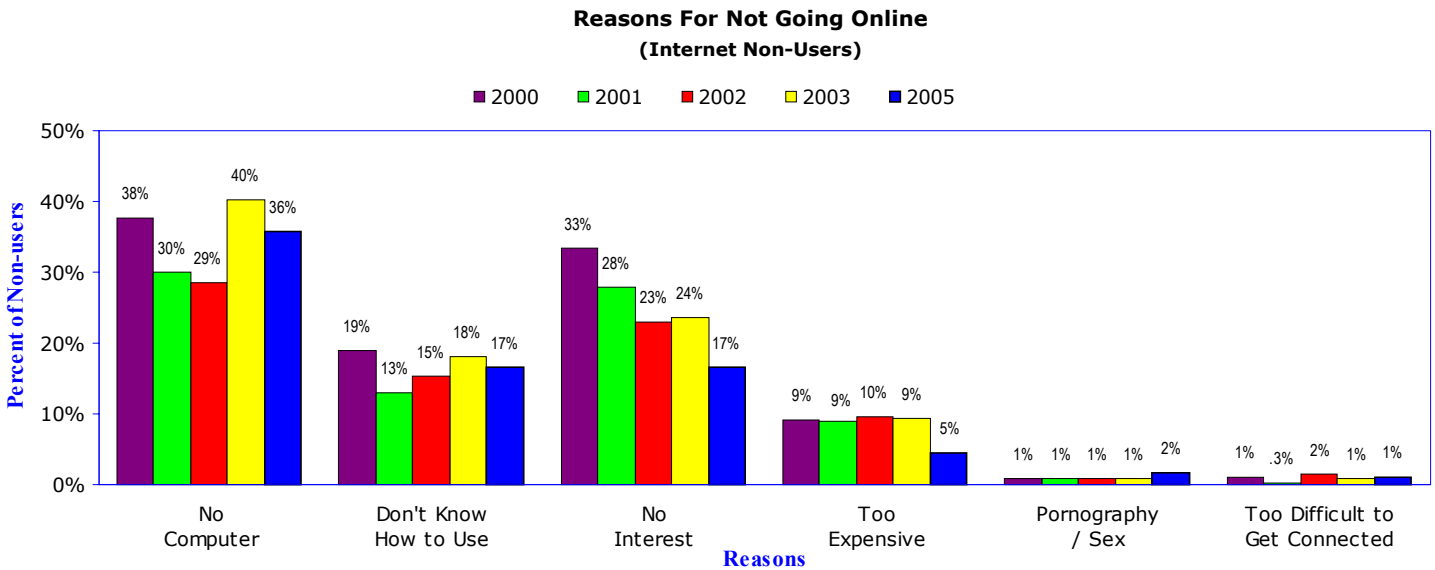
The 21.6 percent of Americans who do not use the Internet express a range of reasons for not being online, but two of the principal reasons are declining in prevalence.

In Year Five of the Digital Future Project, the primary reason for not using the Internet continues to be “no computer” – the reason cited most often in each year of the survey. However, the percentage mentioning this reason is down from 2003.

Lack of interest or “don’t know how to use” are tied this year as the second most cited reason. However, lack of interest has declined to 17 percent of respondents, down from 24 percent in 2003.

And, those who say that their reason for not being online is the expense of using the Internet dropped by almost half, to 5 percent in 2005.

Of particular note: while access to online pornography by children continues to be a hotly-debated public issue, sexual content is cited by only a miniscule number of respondents as a reason for not being online – a finding consistent throughout the five Digital Future Projects.



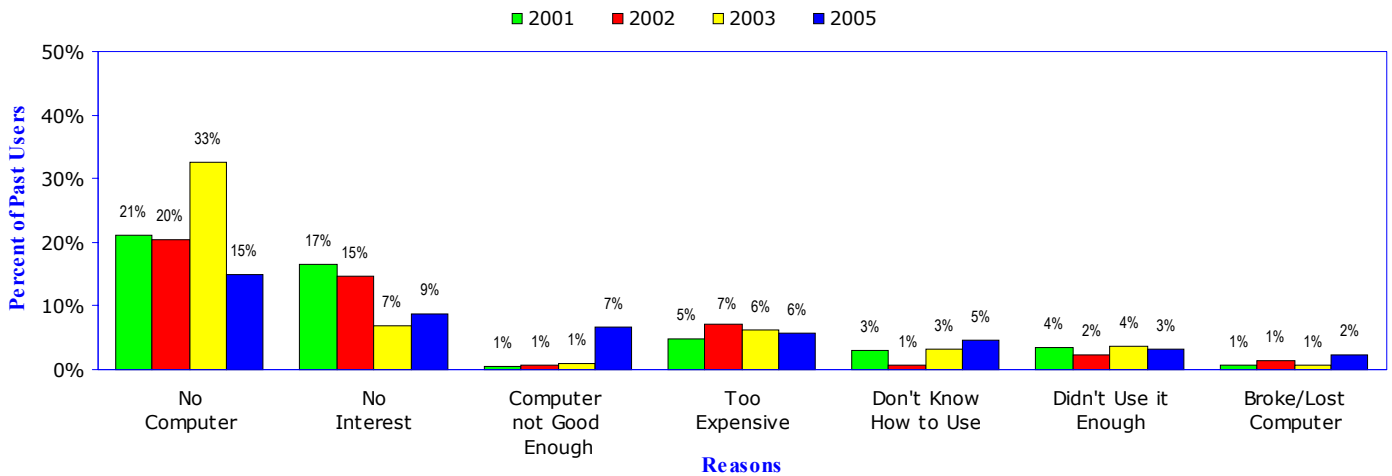
### Electronic Dropouts: Why Do Users Stop Going Online?

Almost 30 percent (29.3 percent) of Internet non-users have previously gone online. Those “electronic dropouts” continue to report many reasons why they no longer use the Internet – however, the primary reason is dropping in prevalence.

In Year Five, a much lower percentage of electronic dropouts reports their reason for not being online as “no computer available” – the lowest level in the five years of the Digital Future Project.

The other major reasons for dropping out: no interest (up in Year Five), and too expensive (down slightly). The number of respondents who say their computer is “not good enough” has increased in the current study.

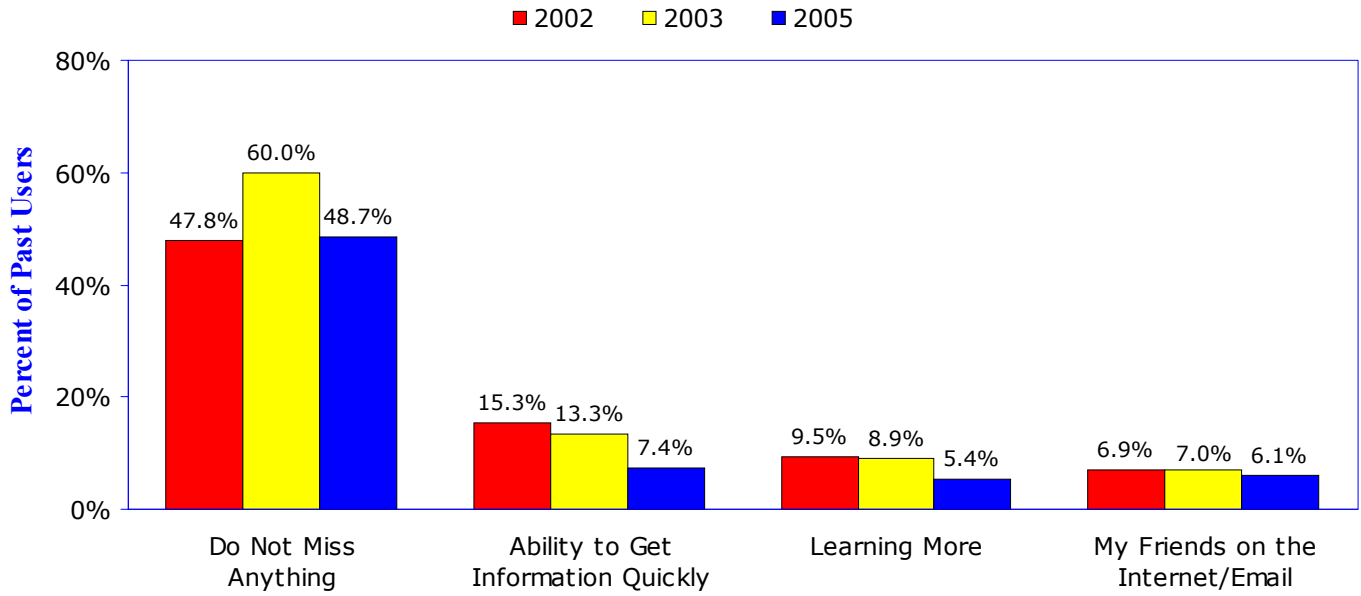
**Electronic Dropouts: Reasons Why Former Internet Users No Longer Go Online**



### What Do You Miss By Not Using The Internet?

In Year Five, the major reasons cited by electronic dropouts in previous years for missing the Internet are being mentioned less often.

**Internet Features Missed By Former Users**



### Will Non-Users Go Online?

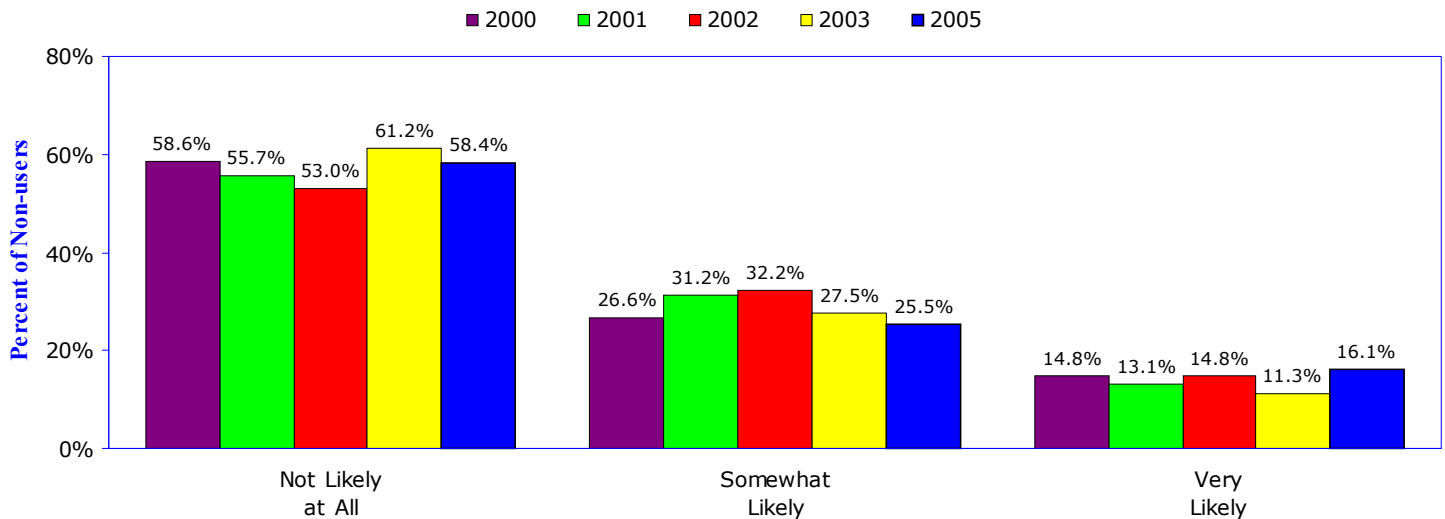
Are Internet non-users likely to become users in the next year?

The number of non-users who say they are somewhat likely or very likely to go online within the next year is still low compared to the early years of the Digital Future Project. However, the number has increased in Year Five of the study.

In 2005, of the 19 percent of respondents who do not currently use the Internet, 41.6 percent say they are somewhat likely or very likely to go online next year – up from 38.8 percent in 2003. The number who are very likely increased to 16.1 percent, up from 11.3 percent of non-users in 2003.

The number of respondents who say they are not likely at all to use the Internet in the next year declined marginally, to 58.4 percent.

**How Likely Will You Be To Use The Internet Within The Next Year?  
(Somewhat Likely Or Very Likely)**



Note: when electronic dropouts are asked, “do you think that you will ever go back to using the Internet,” more than one-quarter (25.2 percent) say they will not go back online.

### How Has Communication Technology Affected The World?

Positive attitudes about how communication technology (the Internet, cell phones, and pagers) affects the world were high and generally stable during the first three years of the Digital Future Project, declined slightly in 2003, and increased in the current study among both users and non-users.

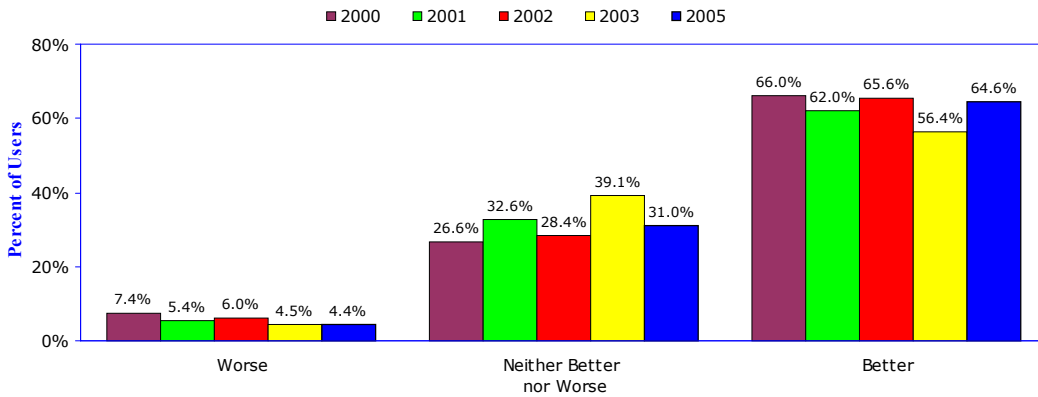
In 2005, 64.6 percent of users say that communication technology makes the world a better place – a substantial increase over the previous year and approaching the level of positive responses in 2000 and 2003.

The proportion of Internet users who report that communication technology makes the world a worse place declined to 4.4 percent – the lowest level among users in the five studies.

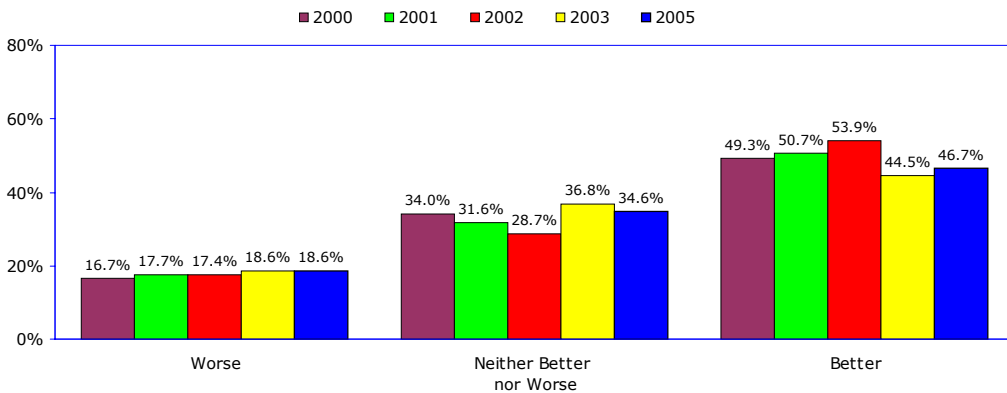
Among non-users, 46.7 percent say that communication technology makes the world a better place – a substantial drop from the peak in 2002, but slightly higher than in 2003.

Of non-users, 18.6 percent say communication technology makes the world a worse place – a tie with 2003 for the highest level in the five years of this project.

**Has Communication Technology Made The World A Better Place, Or A Worse Place? (Internet Users)**



**Has Communication Technology Made The World A Better Place, Or A Worse Place? (Non-Users)**

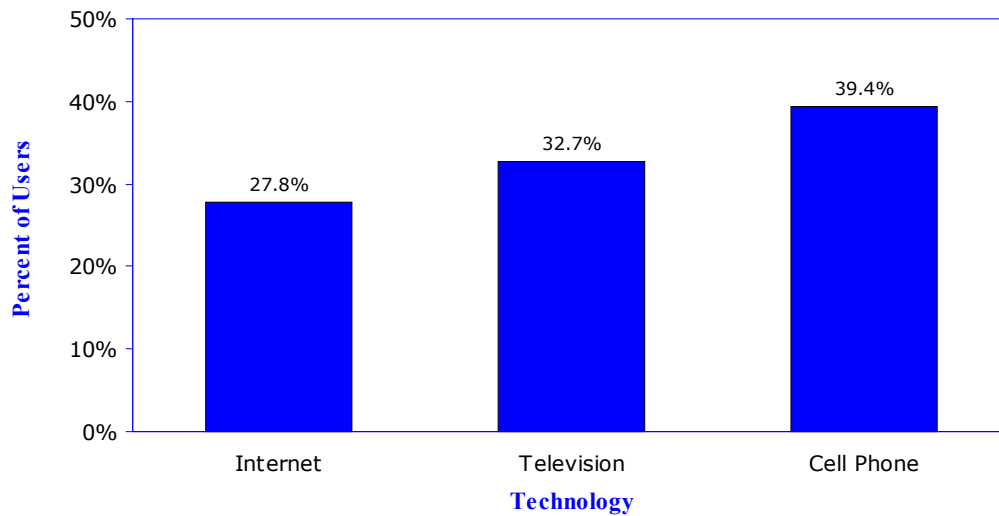


## Which Communication Technology Would You Give Up?

Internet users in 2005 are more loyal to the Internet than they are to their cell phones or television.

When asked which technology they would be most willing to give up, 39.4 percent of Internet users choose their cell phone, followed by 32.7 percent who would first give up television. Only 27.8 percent of users say they would be most willing to give up the Internet.

**If you had to give up one of the following,  
which would you be most willing to give up?  
(Internet Users)**



# Media Use And Trust

In Year Five of the Digital Future Project, how important is the Internet as a source of information? How does the credibility of online information compare to that of other media?

Do hours spent on the Internet continue to replace time spent using other media – especially television?

What role does broadband access play in Internet use?

Do Internet users trust the Web sites they use? Which online material do they trust the most?

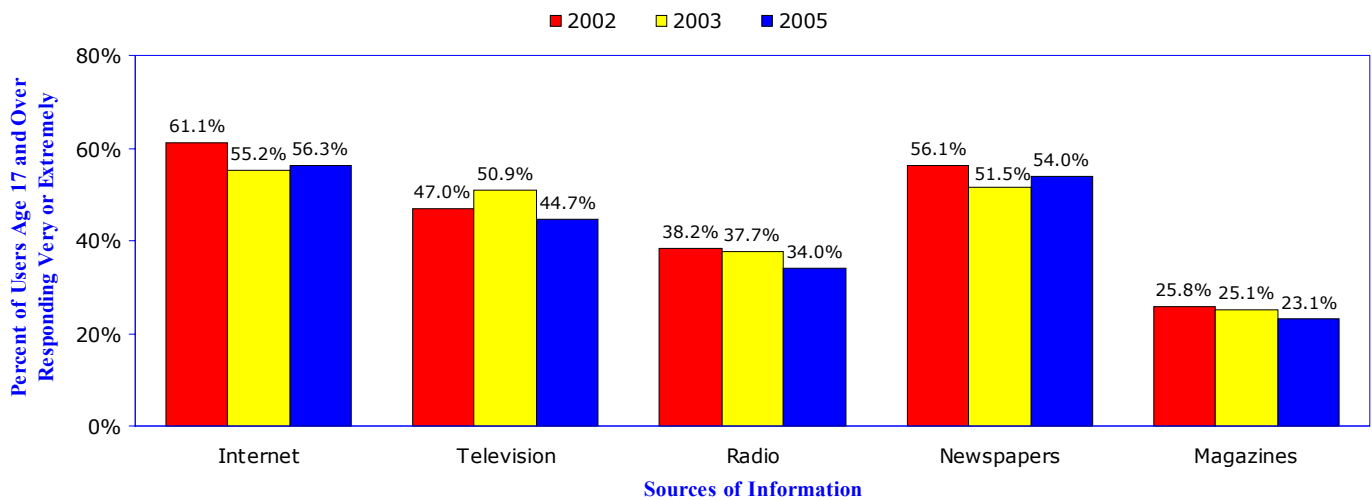


## The Internet: How Important As An Information Source?

After five years of studying American online behavior and attitudes, the Digital Future Report continues to find that the Internet has a solid position as the most important source of information for the vast majority of users.

In 2005, among users age 17 and older, 56.3 percent consider the Internet to be a very important or extremely important source of information for them – up slightly from 2003 (55.2 percent). The importance of newspapers as information sources for Internet users increased marginally in Year Five.

**The Internet: Importance As An Information Source**  
(Internet Users Ages 17 and older)



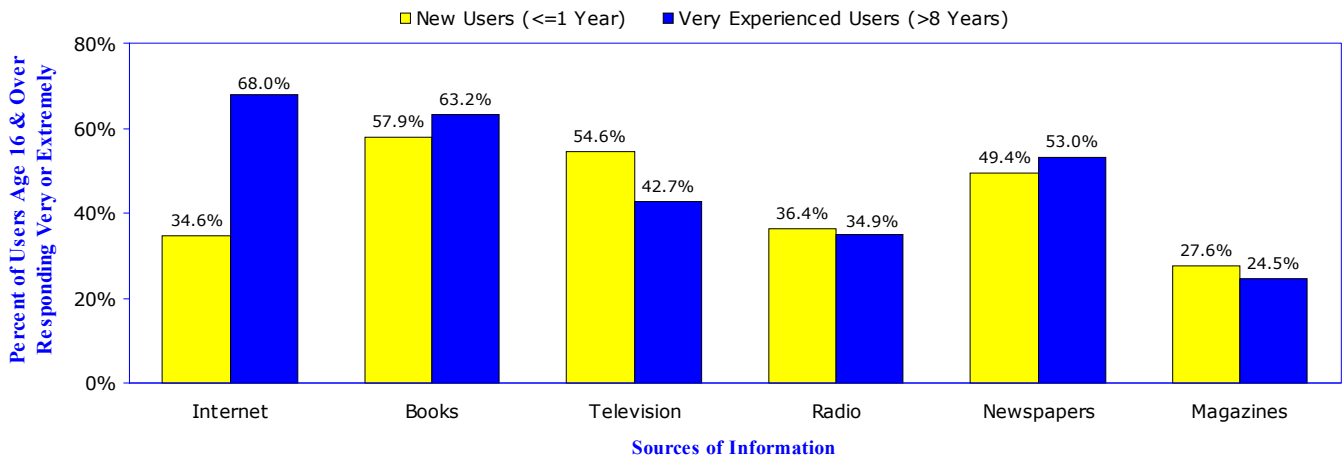
**The Internet's Importance As An Information Source:  
New Users Vs. Very Experienced Users**

More of the very experienced users rank the Internet as a very important or extremely important source of information compared to any other principal information source – television, radio, newspapers, or magazines.

Almost twice as many very experienced Internet users compared to new users rank the Internet as a very important or extremely important source of information.

For new users, only magazines rank lower than the Internet as a very important or extremely important source of information.

**Sources Of Information: Very Important Or Extremely Important**

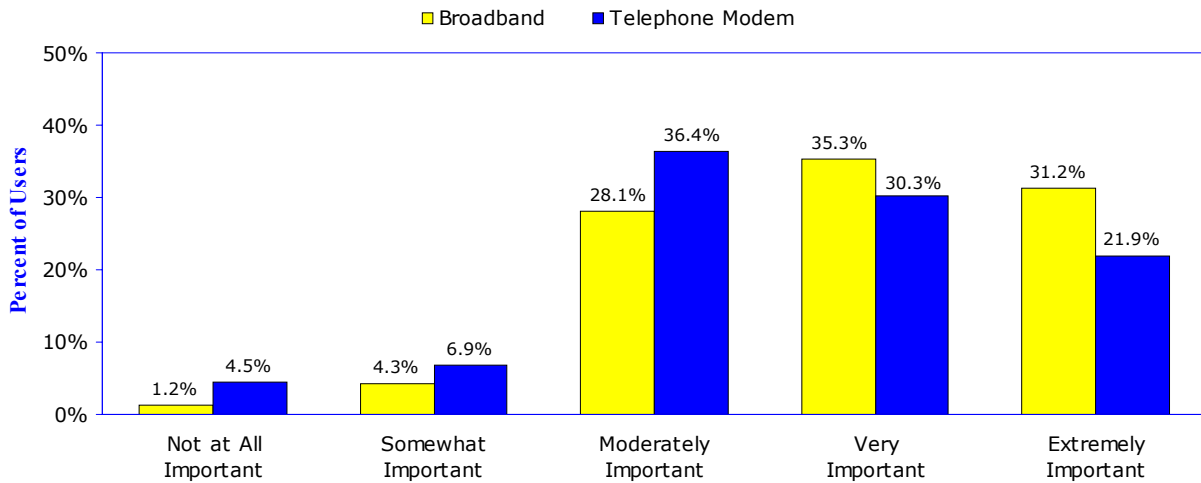


**The Internet As An Information Source:  
Importance to Broadband Users Vs. Telephone Modem Users**

Much higher numbers of broadband users than modem users say that the Internet is the top source of information for them. (Broadband is defined as cable, DSL, ISDN or T1/T3)

Almost two-thirds of broadband users (66.5 percent) consider the Internet a very important or extremely important source of information for them, compared to 52.2 percent of those who access the Internet by telephone modem.

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



### Information On The Internet: Is It Reliable And Accurate?

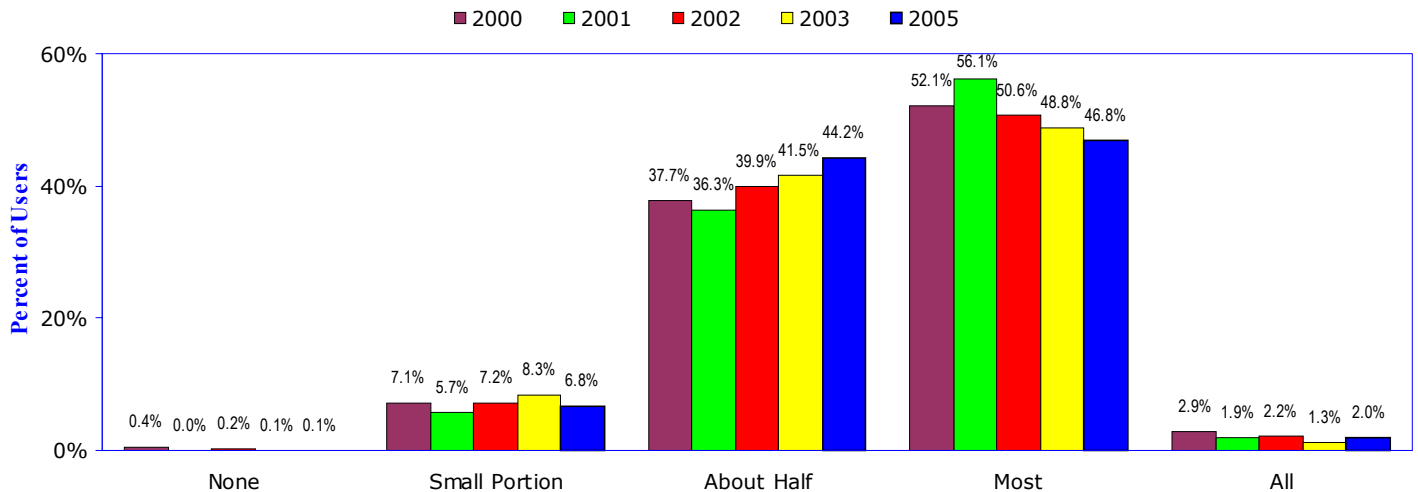
In Year Five, the number of users who believe that most or all of the information on the Internet is reliable and accurate continues to decline for the third year in a row.

In 2005, 48.8 percent of users say that most or all of the information online is reliable and accurate – a decline from the peak of 58 percent in 2001.

The number of users who believe that only about half of the information on the Internet is reliable and accurate continues to grow for the fourth year in a row.

The number of users who say that none or only a small portion of information on the Internet is reliable and accurate has been small and stable in all five years of the study.

**How Much Of The Information On The World Wide Web Overall  
Do You Think Is Reliable And Accurate?  
(Internet Users)**

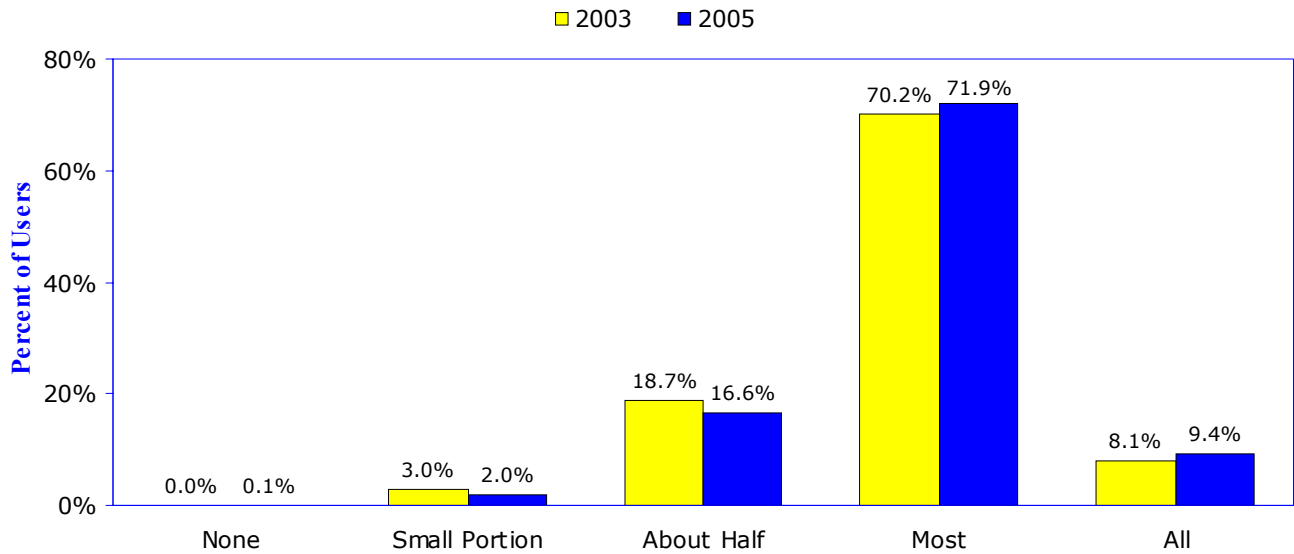


### Accuracy Of Online Information: Frequently-Visited Web Sites

Internet users attribute high degrees of reliability and accuracy to their favorite Web sites.

More than 80 percent of users in 2005 (81.3 percent) say that most or all of the information on Web sites they visit regularly is reliable and accurate.

**How Much Of The Information On The World Wide Web Sites That You Visit Regularly Do You Think Is Reliable And Accurate?**



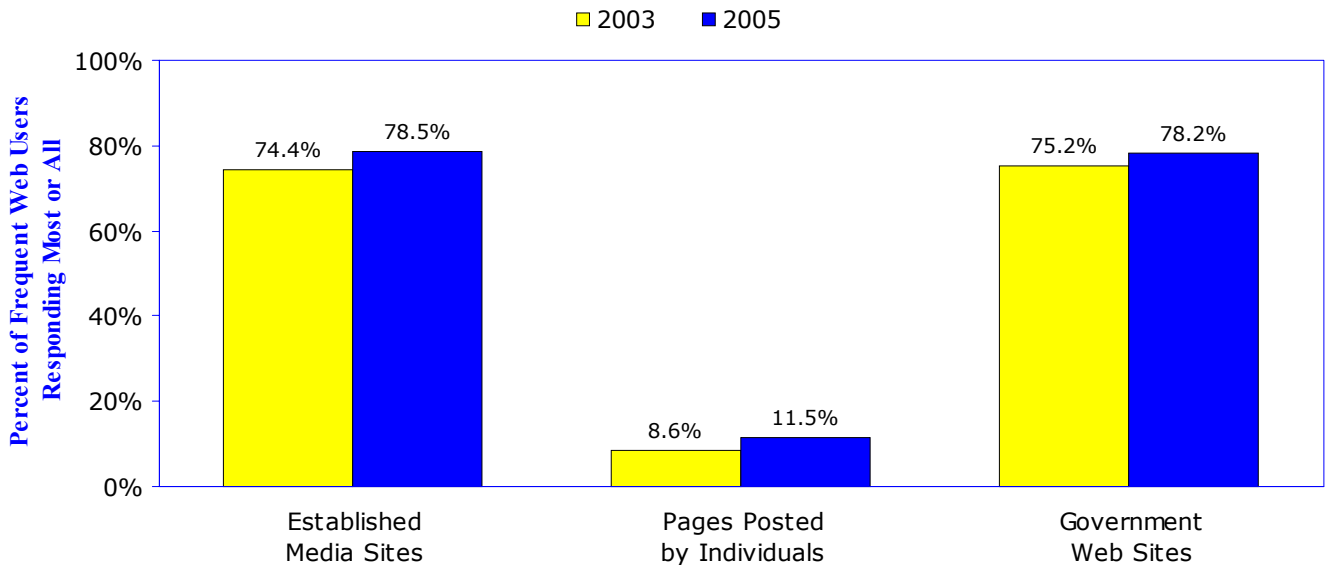
## Which Web Sites Are Reliable And Which Are Not?

In Year Five, large numbers of Internet users say that most of the information posted by established media and government Web sites is reliable and accurate, but report much lower levels of credibility for information posted by individuals.

In 2005, Web sites mounted by established media (such as nytimes.com and cnn.com) ranked highest, with 78.5 percent of users saying that most or all information on those sites is reliable and accurate. Government Web sites fare almost as well; 78.2 percent of users say that most or all information on established media Web sites is reliable and accurate.

Information pages posted by individuals have much lower credibility; only 11.5 percent of users say the information on Web sites posted by individuals is reliable and accurate – up only slightly from 8.6 percent in the previous study.

**How Much Of The Information On Specific Types Of Internet Sites  
Do You Think Is Reliable And Accurate?  
(Internet Users)**

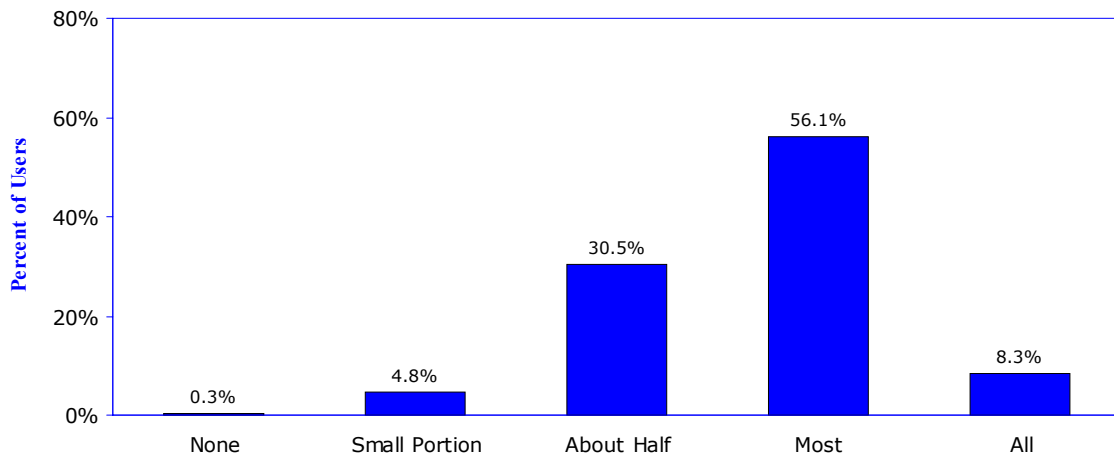


## Search Engines: Are They Reliable And Accurate?

In a new question for the Year Five project, respondents were asked about the reliability and accuracy of Internet search engines, such as Google, Ask Jeeves, and Yahoo.

In 2005, large numbers of Internet users consider search engines to be reliable and accurate; 64.4 percent of users say that most or all of the information produced by search engines is reliable and accurate.

**How Much Of The Information Provided By Search Engines Such As Google  
Is Generally Reliable and Accurate?  
(Internet Users)**

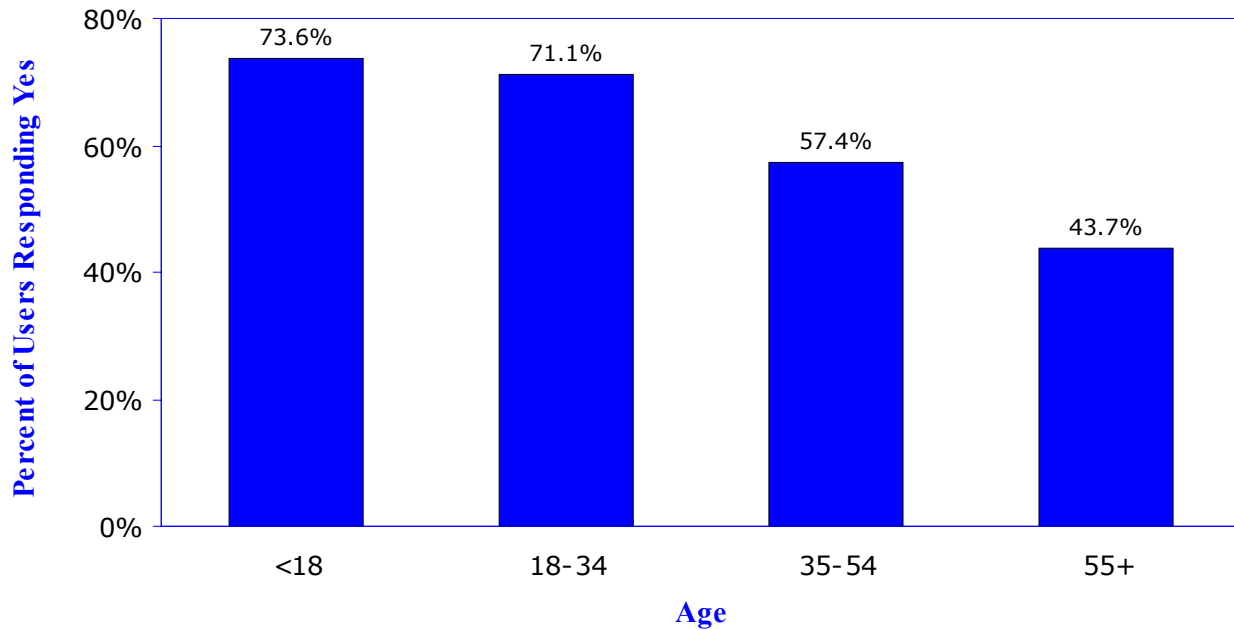


### Multitasking While Online: Across All Ages

Users across all age ranges are multitaskers, engaging in electronic activities offline, such as listening to recorded music or the radio, watching TV, or talking on the telephone while using the Internet.

In 2005, young users are most likely to multitask (73.6 percent of those under 18). However, large numbers of Internet users over 55 (43.7 percent) also multitask while online.

**Do You Do Two Or More Of These Offline Activities --  
Listening To Music, Radio, Watch TV, Talk on the Phone --While Online?  
(By Age)**





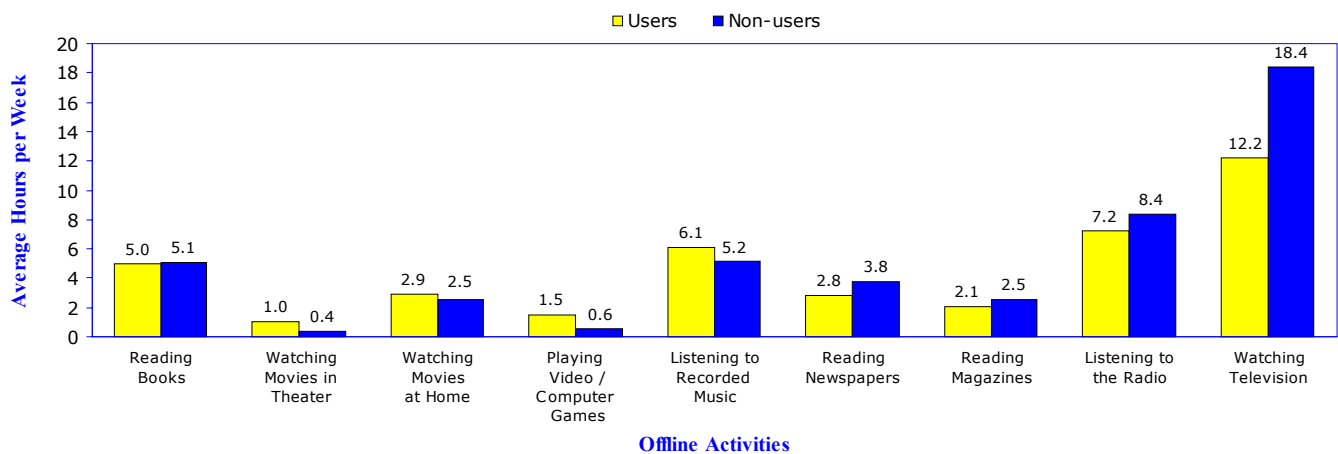
## Internet Users: Media Use While Offline

In 2005, Internet users are online an average of 7.8 hours per week at home. Yet they still find time to engage in other activities at levels comparable to or above those of non-users – with the exception of watching television.

On average, Internet users and non-users spend about the same amount of time reading books, watching movies in the theater, watching movies at home, and reading magazines. Internet users spend more time listening to recorded music, and playing video games. Non-users spend more time reading newspapers (printed versions), and listening to the radio (offline).

The biggest gap in the study of offline activities is time spent watching television. Non-users watch an average of 6.2 hours more television per week than Internet users – yet another piece of evidence that has been consistent in all five years of the study. The only principal social activity that “suffers” from Internet use is TV viewing.

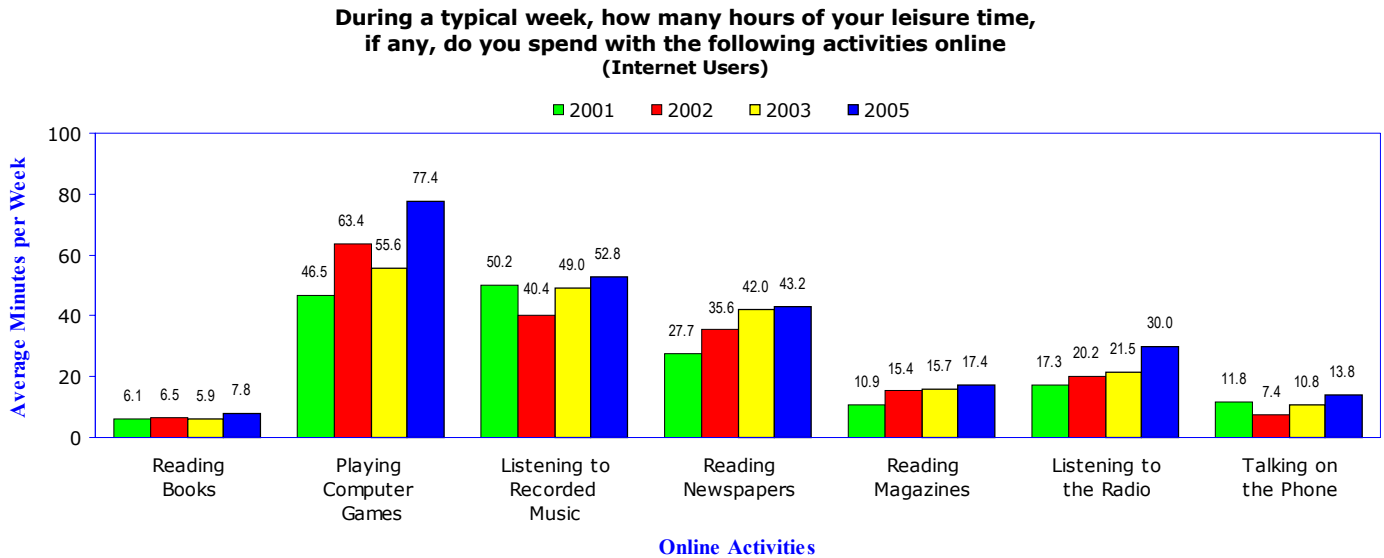
**During a typical week, how many hours of your leisure time, if any, do you spend with the following activities not online?  
(Users and Non-Users)**



## Using Media Online

The Digital Future Project studies have found a general trend upward in the levels of use of many online media.

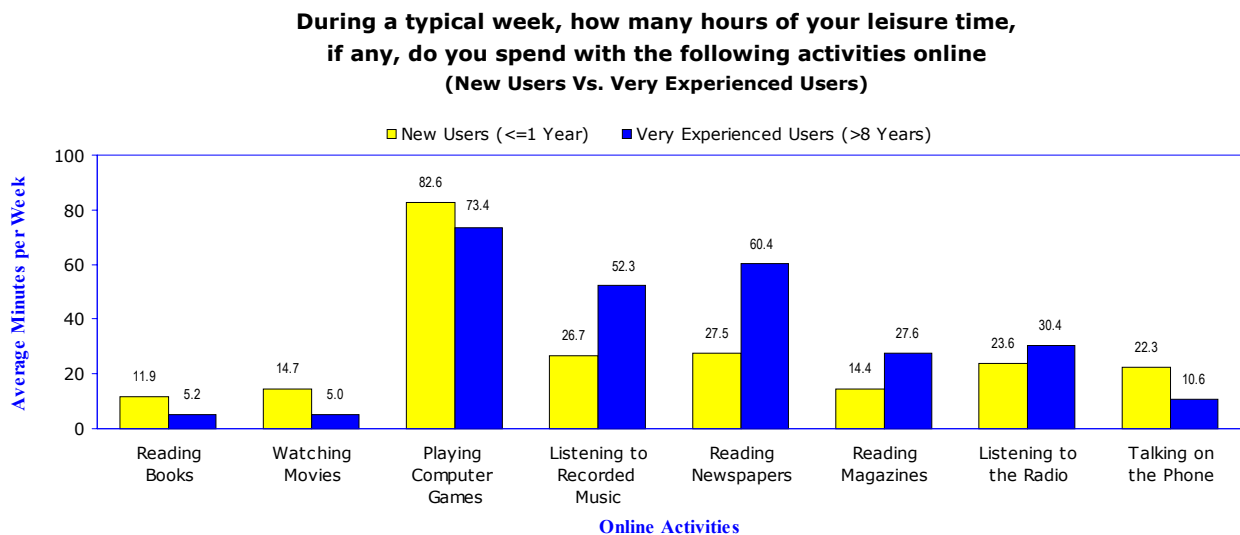
Users spend the largest amount of online time playing computer games, followed by listening to recorded music, reading e-newspapers, listening to Internet radio, reading e-magazines, talking on the telephone, and reading e-books.



## Using Media Online: New Users And Very Experienced Users

New users and very experienced users report varied use of online media.

New users say they spend more time online playing computer games, watching movies delivered on the Internet, and talking on the telephone. Very experienced users spend more time online listening to music, reading e-newspapers and magazines, and listening to the radio.



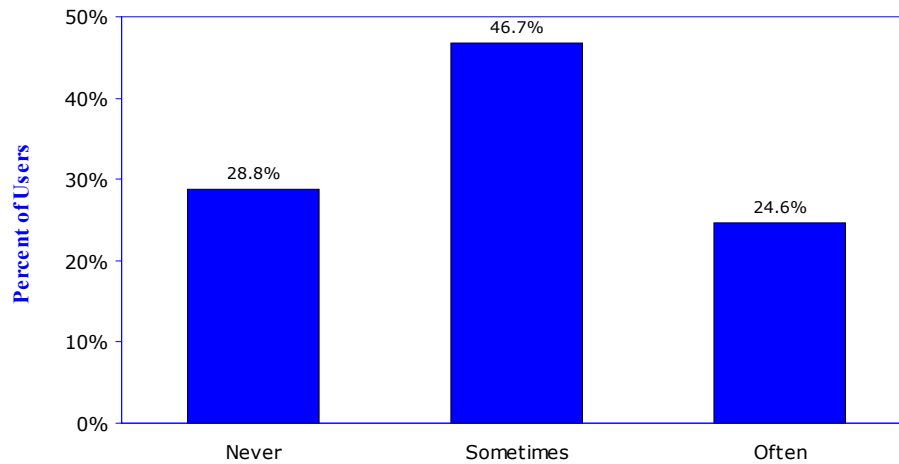
## General Web Surfing

A new question for Year Five asked Internet users how often they go online without a specific destination.

In 2005, Internet users in large numbers (71.3 percent) will sometimes or often go online without a specific destination in mind. Almost one-quarter (24.6 percent) go online often without a specific destination.

For more on the issues raised by general Web surfing, see the Trends section on page 112.

**How Often Do You Go Online Without A Specific Destination?  
(Internet Users)**

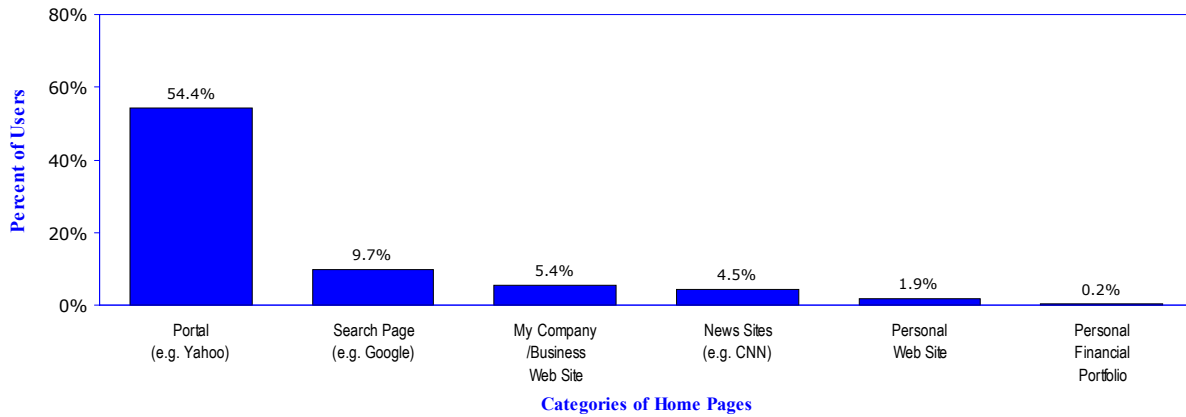


### Internet Home Pages

Another new question for Year Five asked Internet users about their home page when they go online.

For the majority of users (54.4 percent), their home page is a Web portal, such as Yahoo or MSN. About 10 percent of users (9.4 percent) use a search engine such as Google for their home page.

**What Is Your Home Page When You Go Online?  
(Internet Users)**



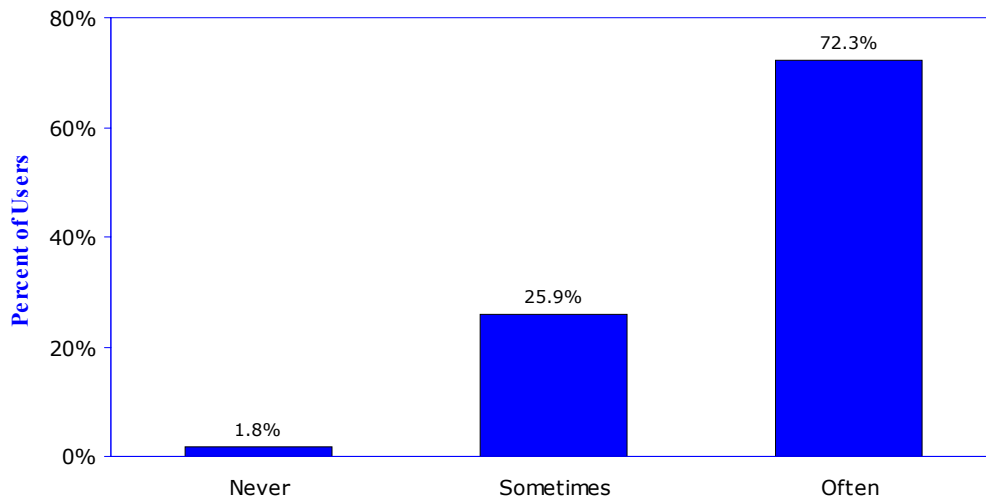
## Search Engines: Are They Providing The Information That Users Seek?

Do Internet search engines do their job?

Another new question for Year Five asked Internet users if online search engines provide the results they need. A large majority of users (72.3 percent) say that their search engine often provides the results they want.

Less than two percent say that search engines never provide useful results.

**How Often Does A Search Engine Give You The Results You Are Looking For?  
(Internet Users)**



# Consumer Behavior

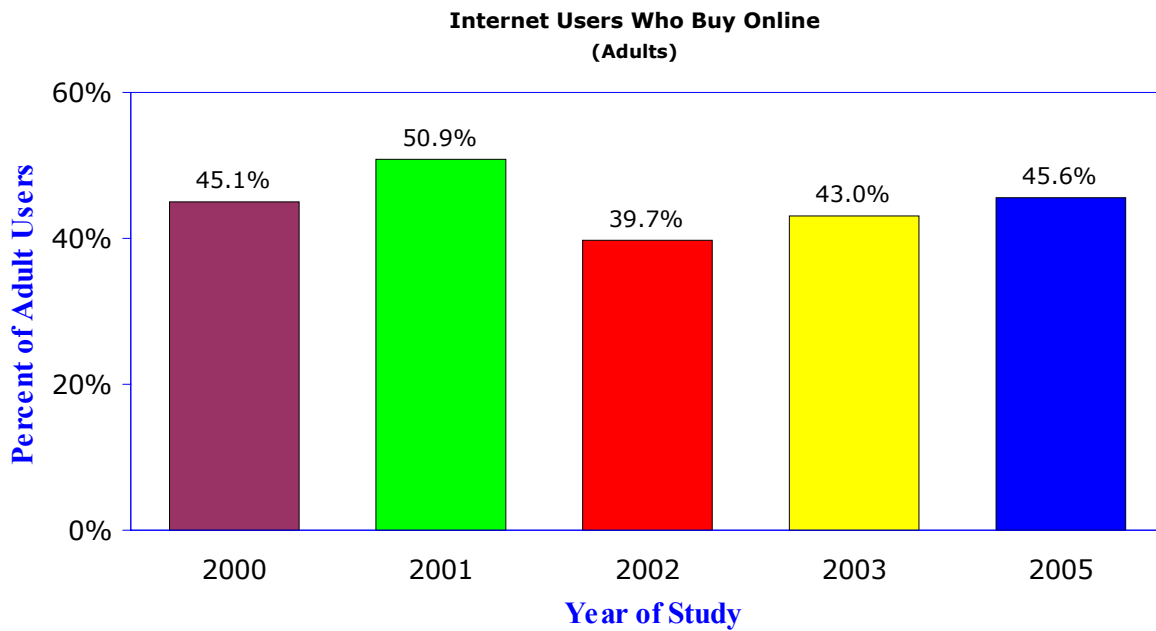
Five years of studying the views and behavior of online purchasers, as well as those who don't buy online, is revealing a range of changes in how Americans shop and buy.

How are American purchasing habits evolving because of the growth of online purchasing? Is buying in-person from local retail stores becoming obsolete? Will online buying continue to increase? How is buying online affecting phone orders and mail orders?

Will buying online be affected by ongoing concerns about online privacy and credit card use? Would Internet users pay for online privacy?

### Internet Purchasing: Who Is Buying Online?

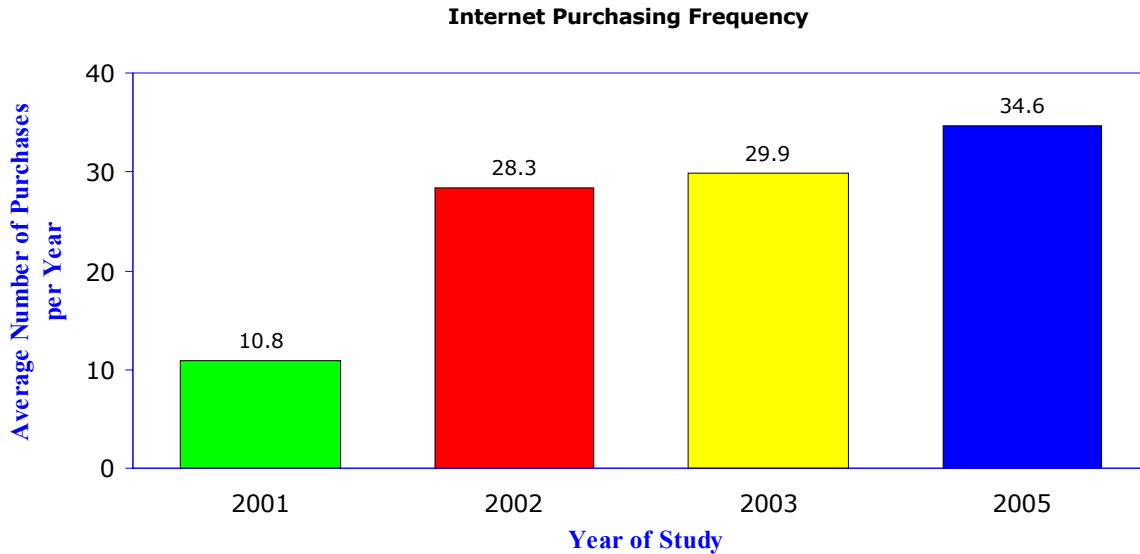
The percentage of adults who buy online has remained generally consistent – between 39 and 51 percent – across the five years of the Digital Future Project, with the exception of a modest dip in 2002.



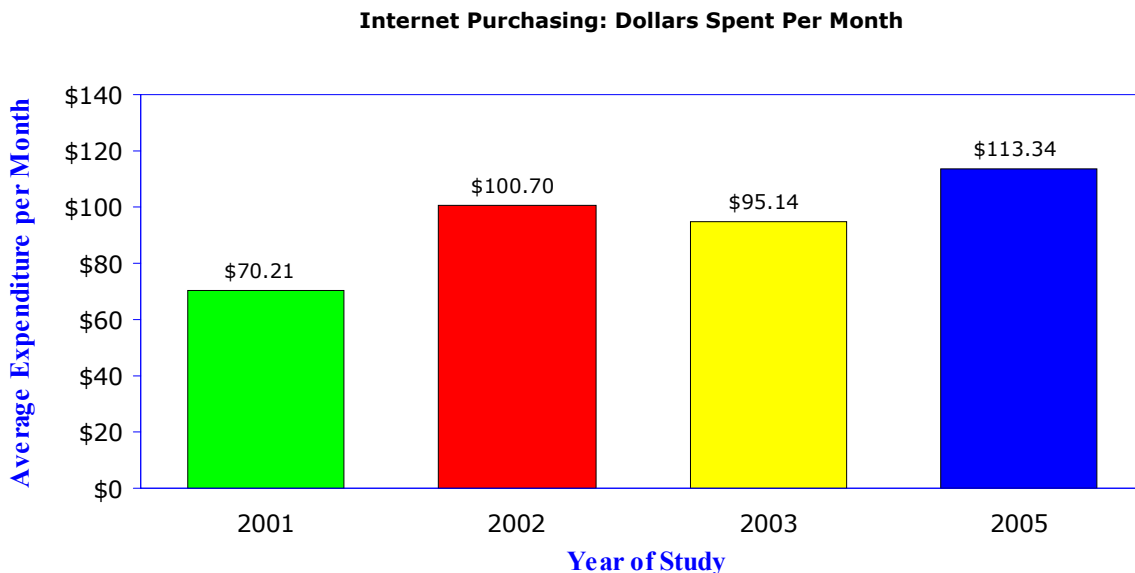
### Internet Purchasing: How Often Do You Buy Online? How Much Do You Spend?

Buying online – both the frequency of purchases and dollars spent – continues to increase.

The number of online purchases continues to increase. In the fifth year of the Digital Future Project, the number of annual purchases by online buyers has tripled since the second year of the study.



Average monthly spending is growing as well. In 2005, online buyers spend an average of \$43 a month more than in 2001.

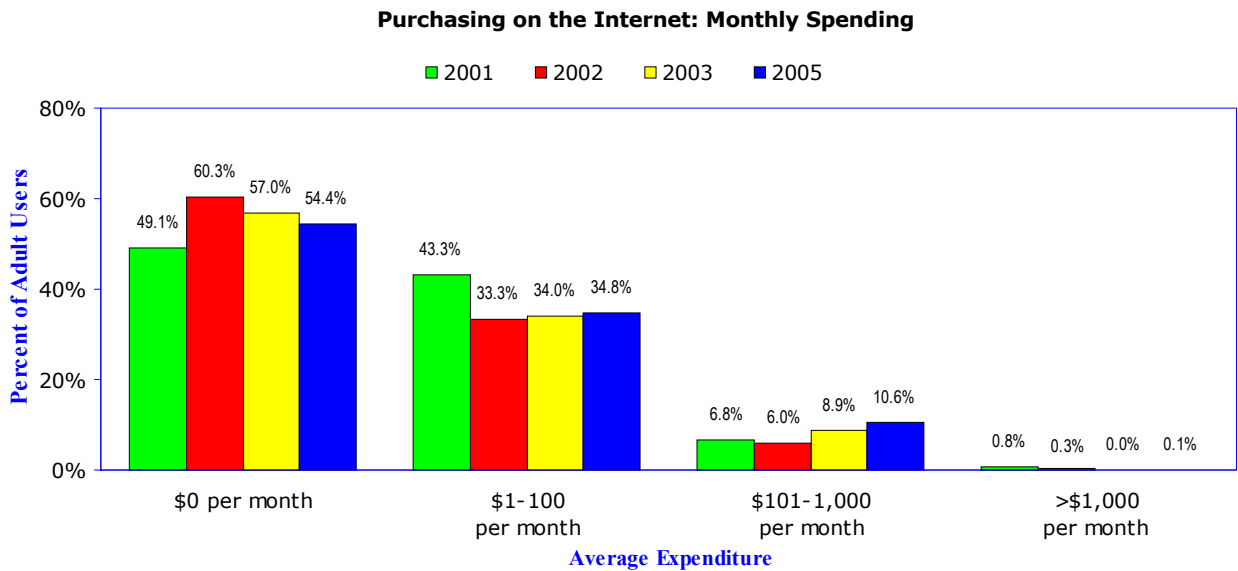




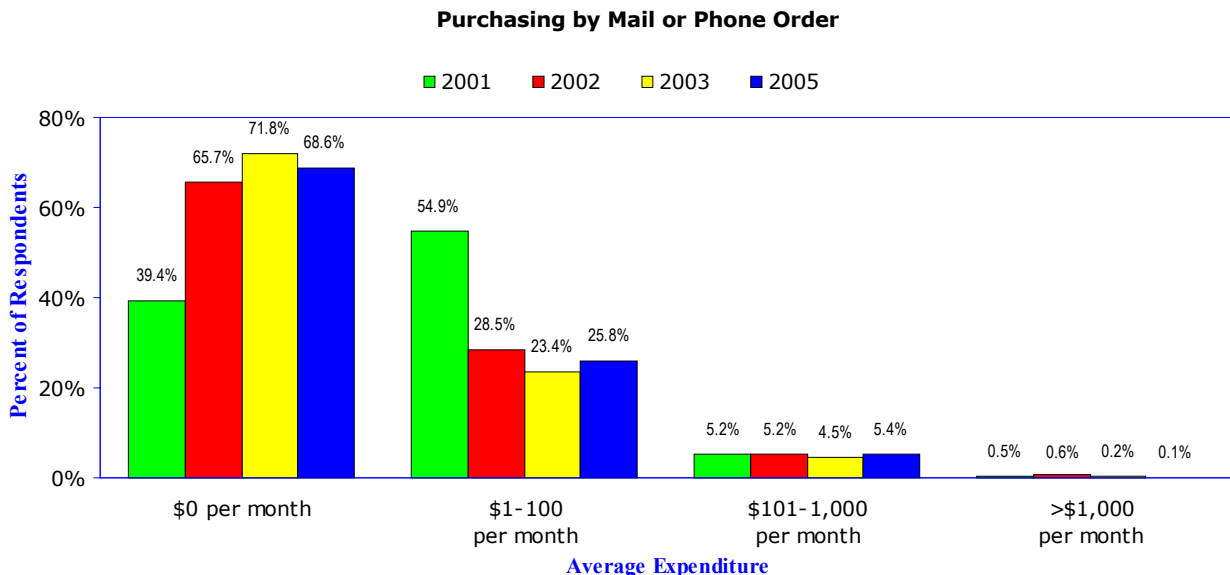
### Monthly Spending: Internet Purchases, Mail Order And Phone Orders

Buying habits – as measured by the dollar amount of monthly spending – are changing for Internet purchasers, but are stable among those who use mail order and phone orders.

When looking at users who buy online, the number who don't spend at all on the Internet is declining. Those who spend less than \$100 a month has been consistent for three years, but the number of online purchasers who spend between \$100 and \$1000 per month is growing.



However, among respondents who order by mail or on the phone, the spending ranges for those forms of purchasing have been generally flat for three years.

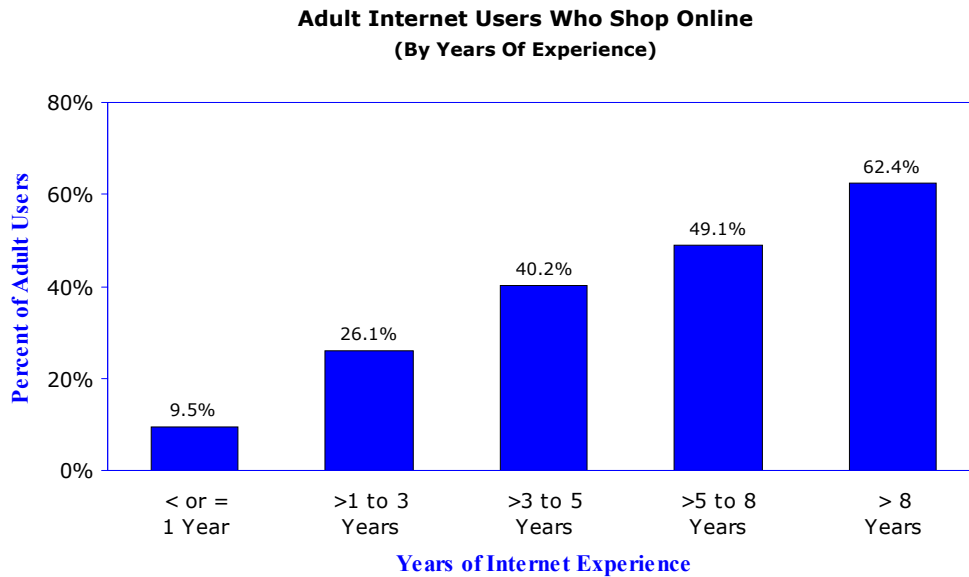


## Buying On The Internet: Purchasing Grows With Online Experience

As Internet experience increases, buying online increases.

Internet users don't necessarily become Web shoppers as soon as they go online. The longer Americans have been using the Internet, the more likely they are to buy online.

In Year Five of the Digital Future Project, more than 60 percent of very experienced users shop online – more than six times the number of Internet buyers with one year or less of online experience.

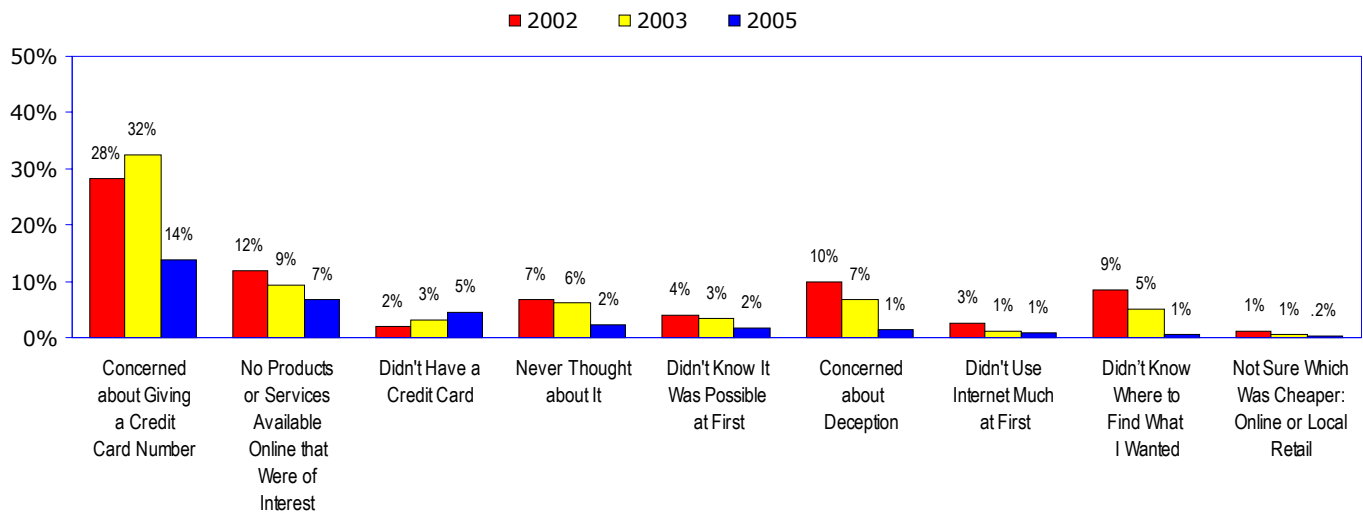


### Why Do Internet Users Delay Their Online Purchasing?

When users who waited more than three months to buy on the Internet are asked why they delayed their online purchasing, the largest number say they waited because they were concerned about using a credit card number online – a finding consistent through several surveys of the Digital Future Project. However, in Year Five of the study, the number of users who delayed their online purchasing because of credit card concerns has declined substantially.

The only reason cited more often this year than previous years by users for delaying their online purchasing is the lack of a credit card.

**What would you say was the main reason it took you to make that first purchase on the Internet?**

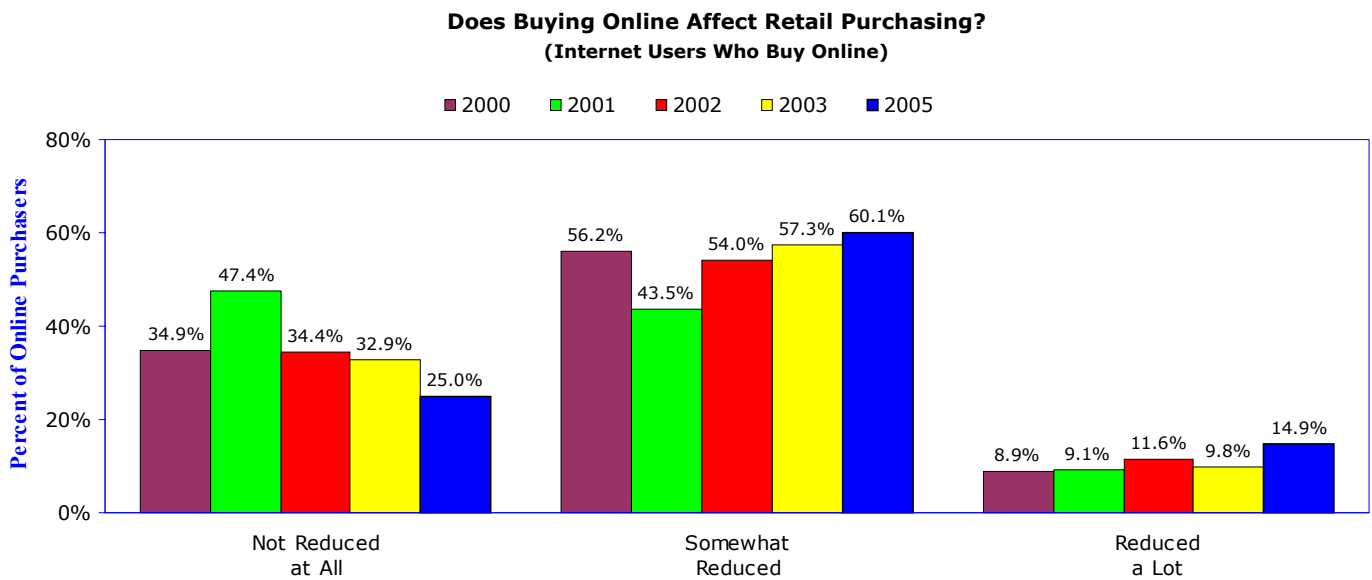


## Buying Online: How Does It Affect Purchasing In Stores?

Online purchasing is having a growing effect on purchasing in traditional retail stores.

Three-quarters of Internet users who buy online say that the online buying is reducing their purchasing from local retail stores.

The percentage of online purchasers who say that their retail buying has been “reduced a lot” has reached its highest level in the five years of the Digital Future Project.

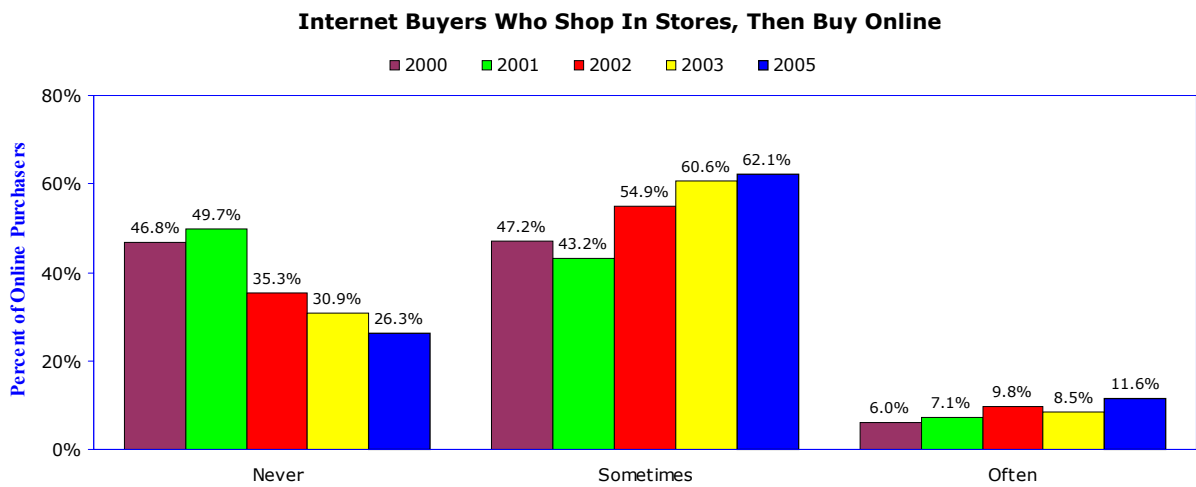


### Browsing For Products: Online And In Stores

Although Internet users say that their online purchasing cuts into retail buying (see page 68), a growing percentage of respondents report using both the Internet and retail stores for browsing and purchasing.

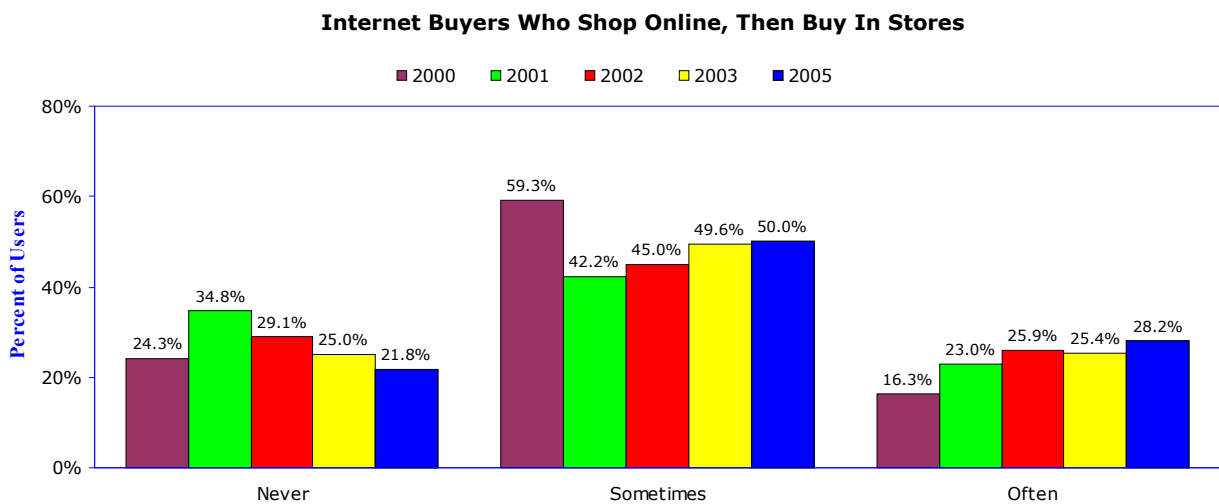
The percentage of online purchasers in the Year Five study who say they shop in local stores and later buy online increased for the fourth year in a row.

In 2005, 73.7 percent of Internet purchasers say they sometimes or often browse in traditional retail locations and then buy online – up from 69.1 percent in 2003.



And, even higher percentages of respondents say they use the Internet as a merchandise browsing tool before buying in stores. In 2005, 78.2 percent of Internet users say they shop online and then buy in retail stores.

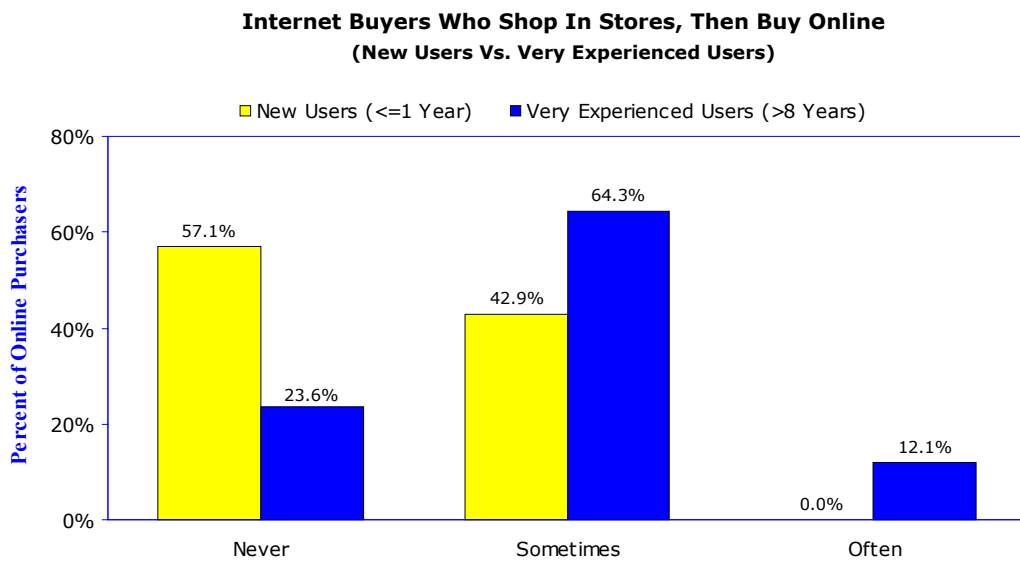
A much higher percentage of Internet users (28.2 percent) say they often shop online and then buy in stores, compared to 11.6 percent who shop in stores and then buy online. Q910 (m-3)



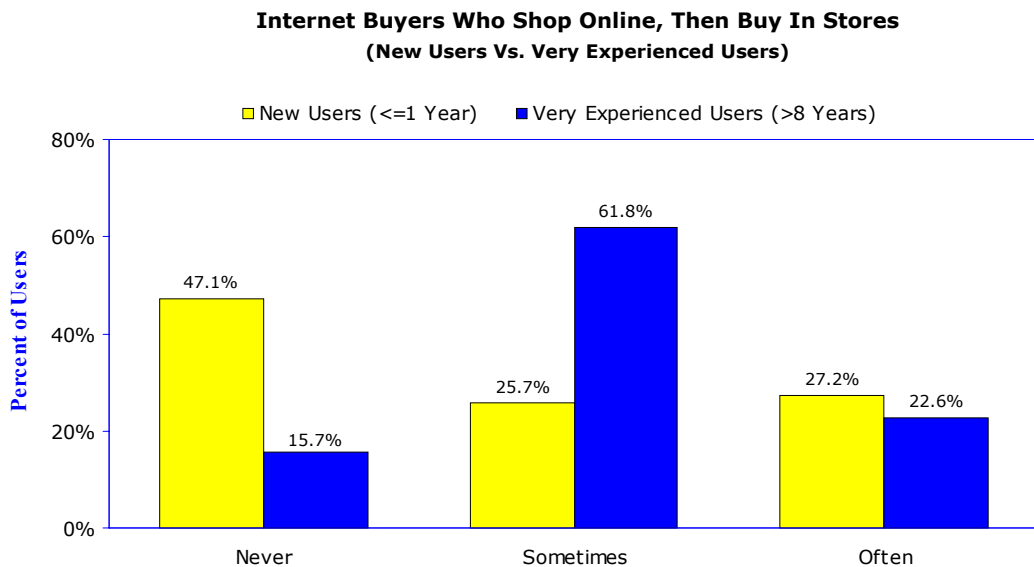
## Browsing For Products Online And In Stores: Real Differences Between New Users And Very Experienced Users

Looking at the differences in buying habits of new users and very experienced users in 2005 tells one aspect of the story about how purchasers use the Internet and retail stores for browsing and purchasing.

More than three-quarters (76.4 percent) of very experienced users shop sometimes or often in local stores and then buy online, compared to 42.9 percent of new users who report the same behavior (note zero percent of new users say they often shop in stores and then buy online).



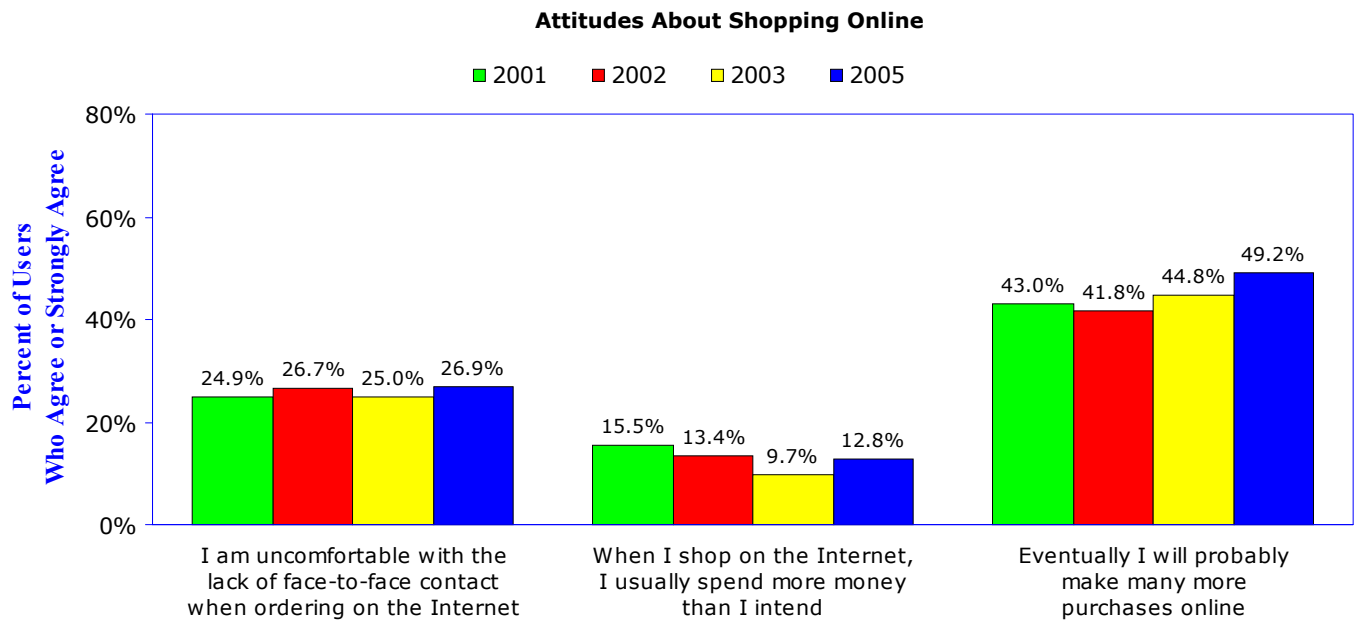
Large percentages of both new users and very experienced users say they shop online and then buy in local stores. However, a larger percentage of new users shop online and then buy in stores (52.9 percent) compared to those who shop in stores and then buy online.



## Attitudes About Buying Online

Opinions about buying online have remained generally consistent throughout the five years of the Digital Future Project, with some growth in the number of users who say they will eventually make more purchases online.

The percentage of users who agree that they are uncomfortable with the lack of face-to-face contact when ordering on the Internet has fluctuated only slightly during the surveys. The percentage of users who agree that they spend more online than they intended rose slightly in 2005 over 2003. And, the percentage of users who say they will eventually make many more purchases online is growing steadily, and has now reached the highest level in the history of the study.

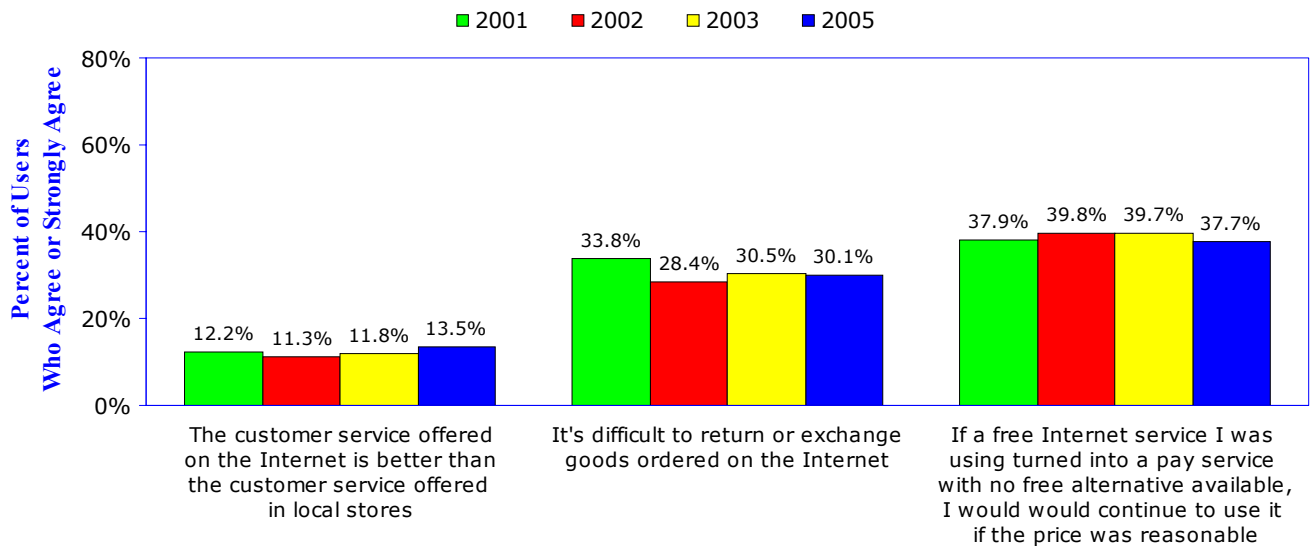


## Attitudes About Internet Purchasing Services

Internet users have reported generally consistent views about customer service online, returning or exchanging goods ordered through the Internet, and free services becoming pay services.

The highest levels of agreement were expressed by users who say that if a free service turned into a pay service, with no free alternative available, they would continue to use the service if reasonably priced.

**Attitudes About Internet Purchasing Services**  
(Internet Users Who Agree Or Strongly Agree)





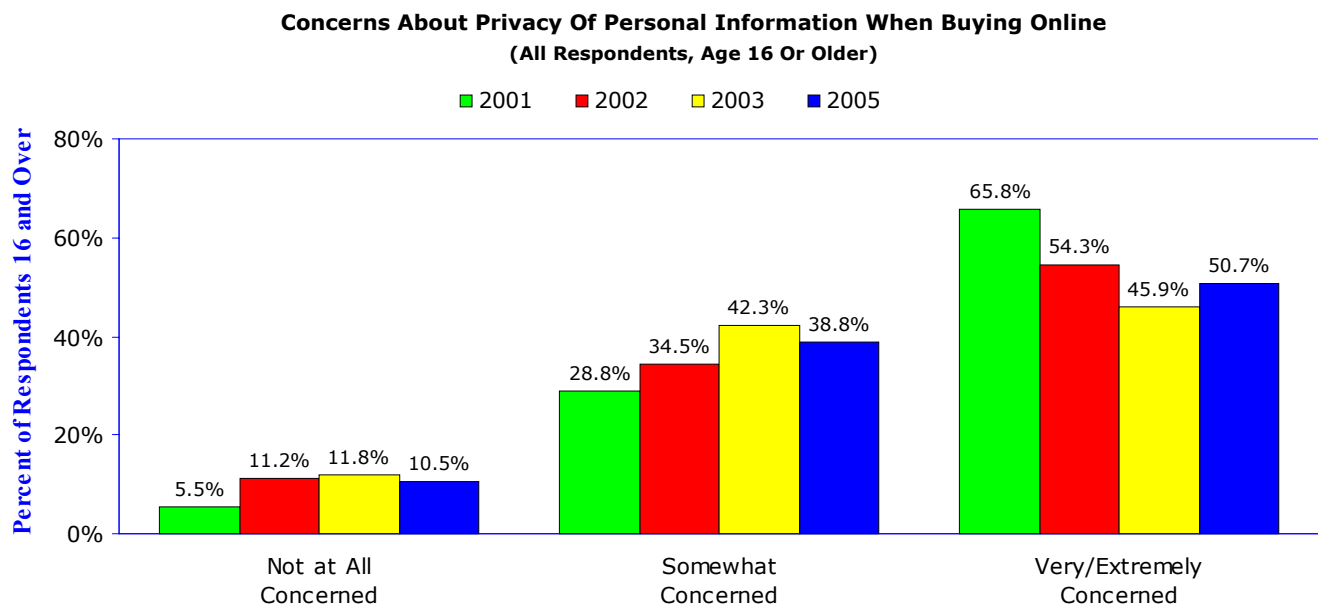
## Concerns About Privacy When Buying Online

The Digital Future Project continues to explore the issues of privacy and security online in Year Five of this study. The findings consistently show that most respondents report some level of concern about the privacy of their personal information – such as name and address, phone number, and purchasing habits – when or if they buy on the Internet. The intensity of that concern had been declining in previous years; however, in 2005, concern about the security of personal information rose.

Overall, the total percentage of respondents age 16 and over who report some concern about online personal information is very high, and generally consistent during the years this question was asked: between 88 and 94 percent of respondents report some concern.

In 2005, almost 90 percent of respondents age 16 and over (89.5 percent) express some level of concern about the privacy of their personal information when or if they buy online – up slightly over the 88.2 percent in the previous year.

In particular, the percentage who report the highest level of concern (very or extremely concerned) rose in Year Five to more than half of respondents – the first increase in four years.

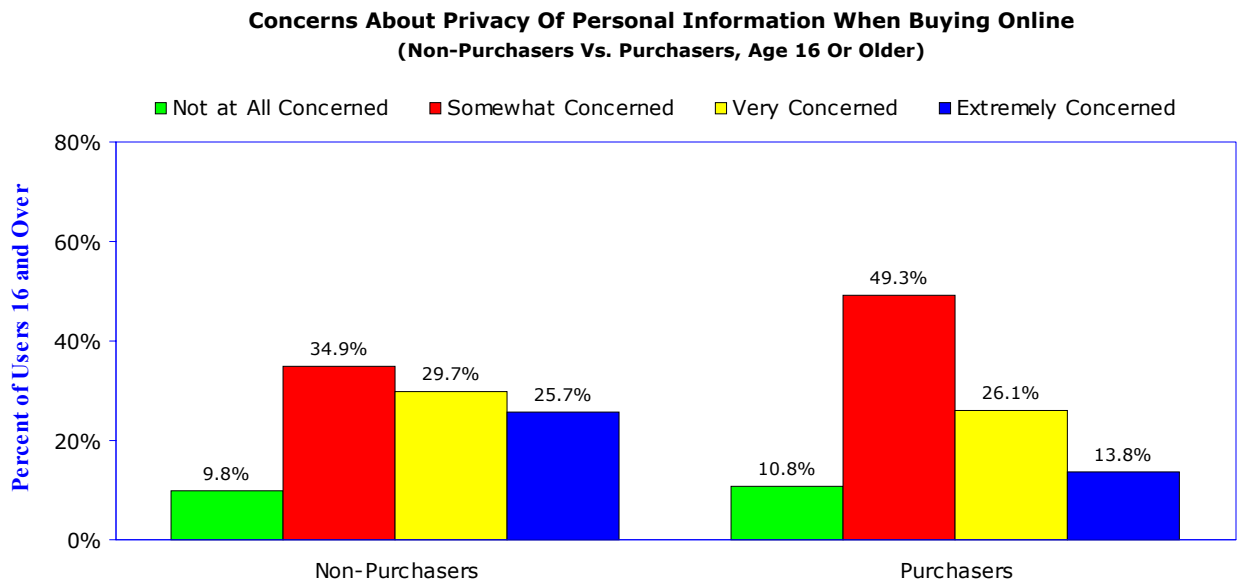


## Concerns About Privacy: Comparing Non-Purchasers Vs. Purchasers

Comparing Internet purchasers to non-purchasers in 2005 reveals much higher percentages of non-purchasers who are concerned about the privacy of their personal information when or if they buy online.

Among purchasers, 39.9 percent are very concerned or extremely concerned about the privacy of personal information, compared to more than half (55.4 percent) of non-purchasers.

The percentages of purchasers and non-purchasers who are not concerned at all about online privacy of personal information are about the same.

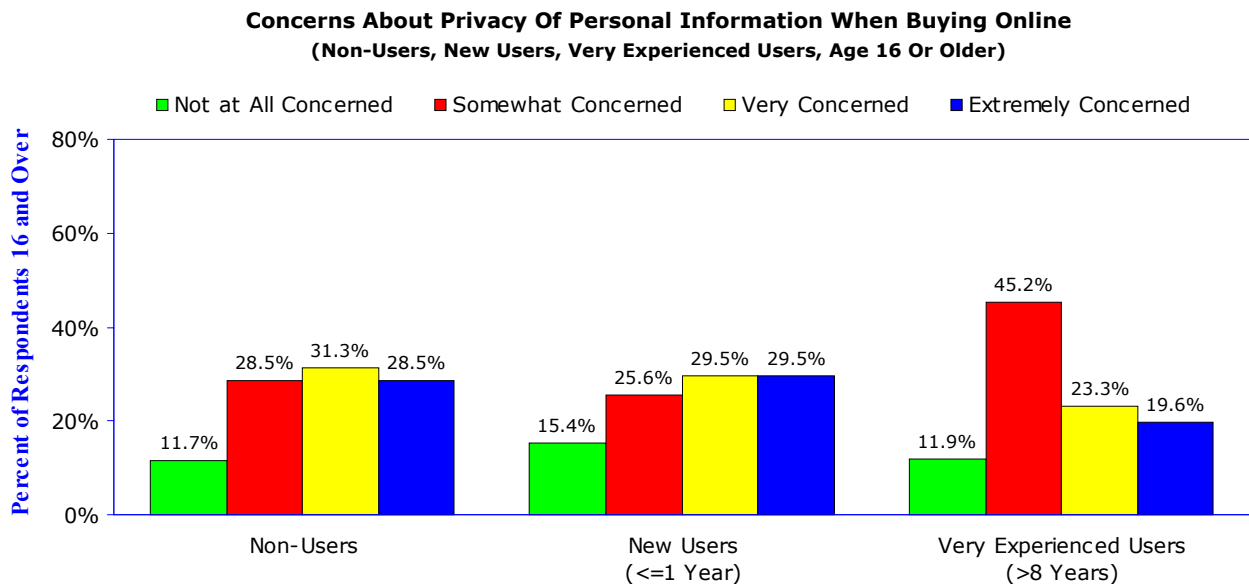


### Concerns About Privacy: Comparing Non-Users, New Users, Very Experienced Users

In 2005, 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 – a finding consistent with previous years of this study.

In Year Five of the Digital Future Project, 42.9 percent of very experienced users report the highest levels of concern about the privacy of personal information when or if they buy online – this compared to 59 percent of new users and 59.8 percent of non-users.

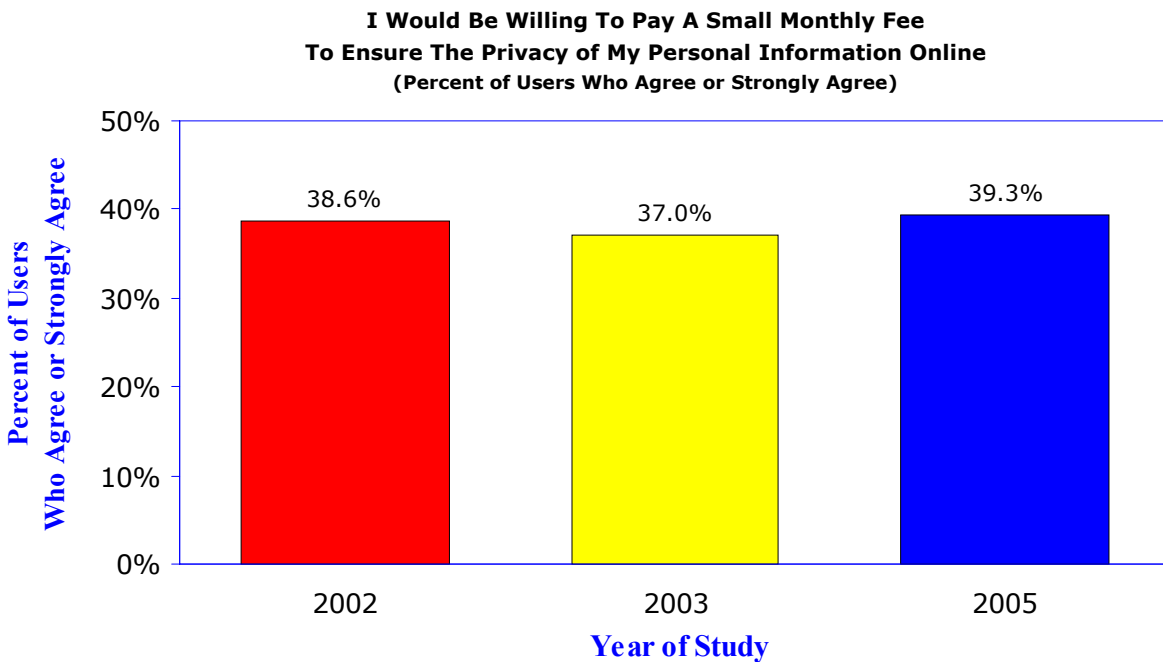
The biggest difference between the three groups is the large number of very experienced users (45.2 percent) who are only somewhat concerned about the privacy of personal information when or if they buy online.



### Privacy: Will Internet Users Pay For It?

Although Internet users in large numbers express high levels of concern about the privacy of their personal information when they go online (see the previous three pages), less than a majority would pay for increased privacy as a solution to the problem.

When asked to respond to the question, “I would be willing to pay a small fee each month to ensure the privacy of my personal information online,” only 39.3 percent agree or strongly agree – a finding generally consistent throughout the different years in which the question was asked.



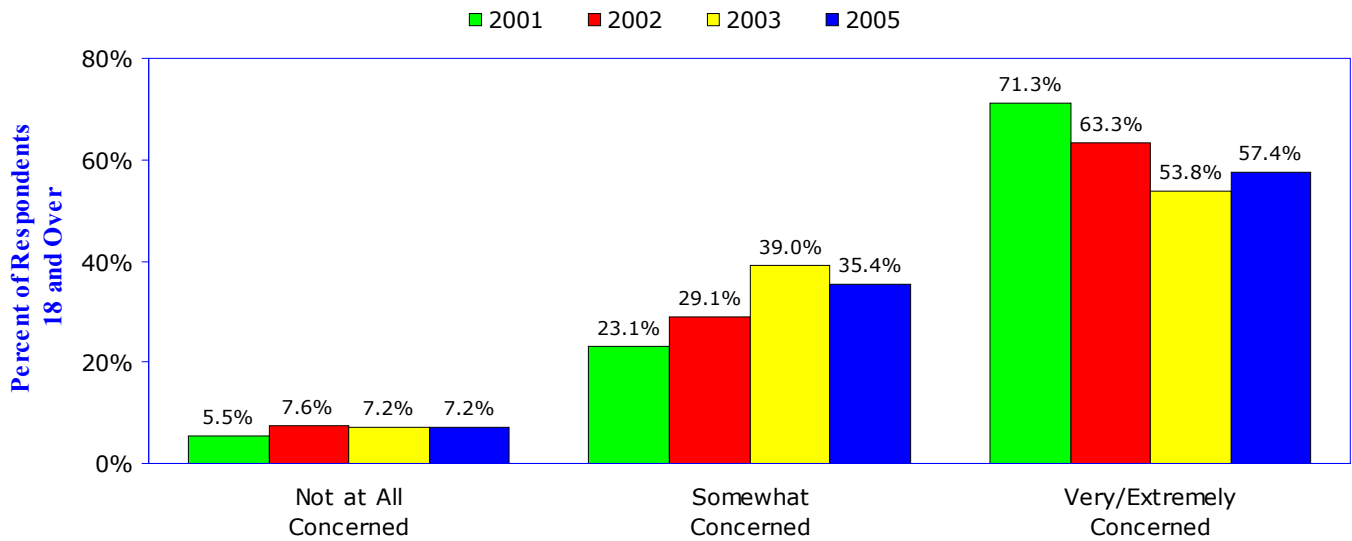
### Concerns About Credit Card Information: No End In Sight?

As worries about personal privacy online continue, concerns about credit card security on the Internet are also at high levels among all respondents. However, those concerns about credit card security appear to be stabilizing.

Comparing four years of findings, the overall percentage of respondents age 18 or over who express some level of concern about the security of their credit card information when or if they buy online have been approximately the same: 94.4 percent in 2000, 92.4 percent in 2001, 92.8 percent in 2002, and 92.8 in 2004.

Although the percentage of those who say they were very concerned or extremely concerned declined in 2002 and 2003, in 2005 this trend was reversed.

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



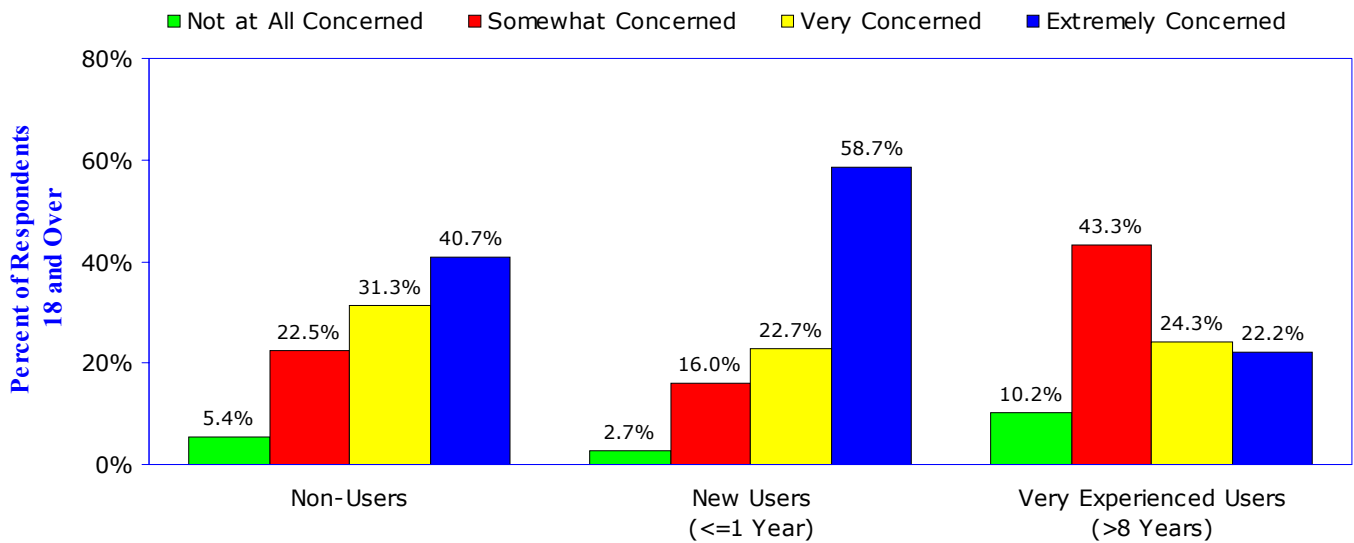
### Concerns About Credit Card Information: Comparing Non-Users, New Users, Very Experienced Users

Comparing concerns about credit card security based on the amount of Internet use reveals lower – but still relatively high – levels of concern among very experienced users.

In 2005, 46.5 percent of very experienced users say they are very concerned or extremely concerned about the security of their credit card information when or if they buy online – compared to 81.4 percent of new users and 72 percent of non-users.

Of special note in Year Five of the study is the large number of new users (58.7 percent) who say they are extremely concerned about the security of credit card information.

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

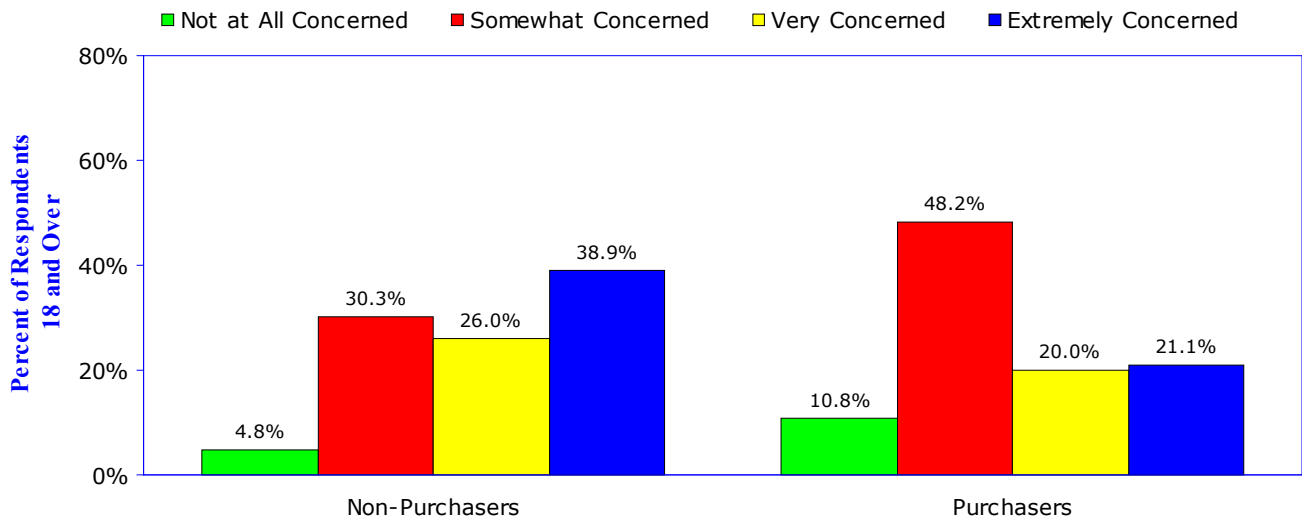


**Concerns About Credit Card Information:  
Non-Purchasers Vs. Purchasers**

Among Internet users in 2005, concerns about the security of credit card information begin to decline somewhat once they begin to buy online.

Among Internet users who do not buy online, 64.9 percent say they would be very concerned or extremely concerned about credit card security if they bought online. Among Internet purchasers, the high levels of concern drop to 41.1 percent.

**Concerns About Credit Card Security When Buying Online  
(Purchasers Vs. Non-Purchasers)**

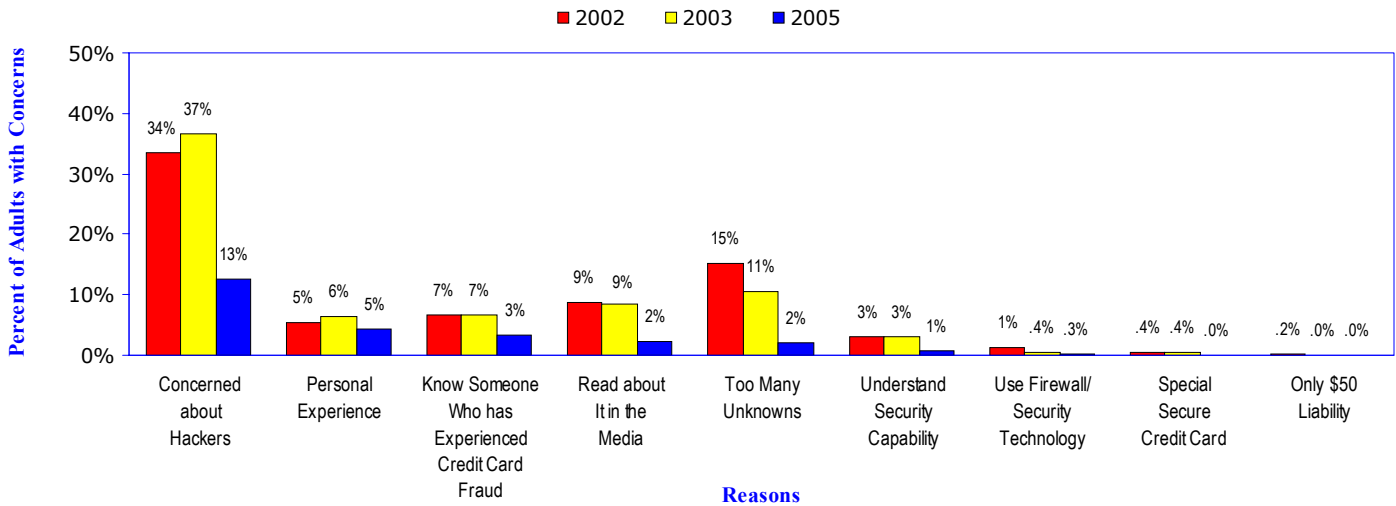


### Concerns About Credit Card Information: Why?

Although very large numbers of respondents say they are concerned about the online security of their credit card information, the primary reasons for concern cited previously are given less frequently.

In 2005, only 12.7 percent of respondents say they are concerned about credit card security because of hackers. In the previous studies by the Digital Future Project, concern about hackers was by far the largest concern. Yet in the current study, the percentage of people expressing this concern has declined by almost two-thirds.

**What Are Your Concerns About Credit Card Security When Buying Online?**  
(All Respondents – Primary Reasons Cited)



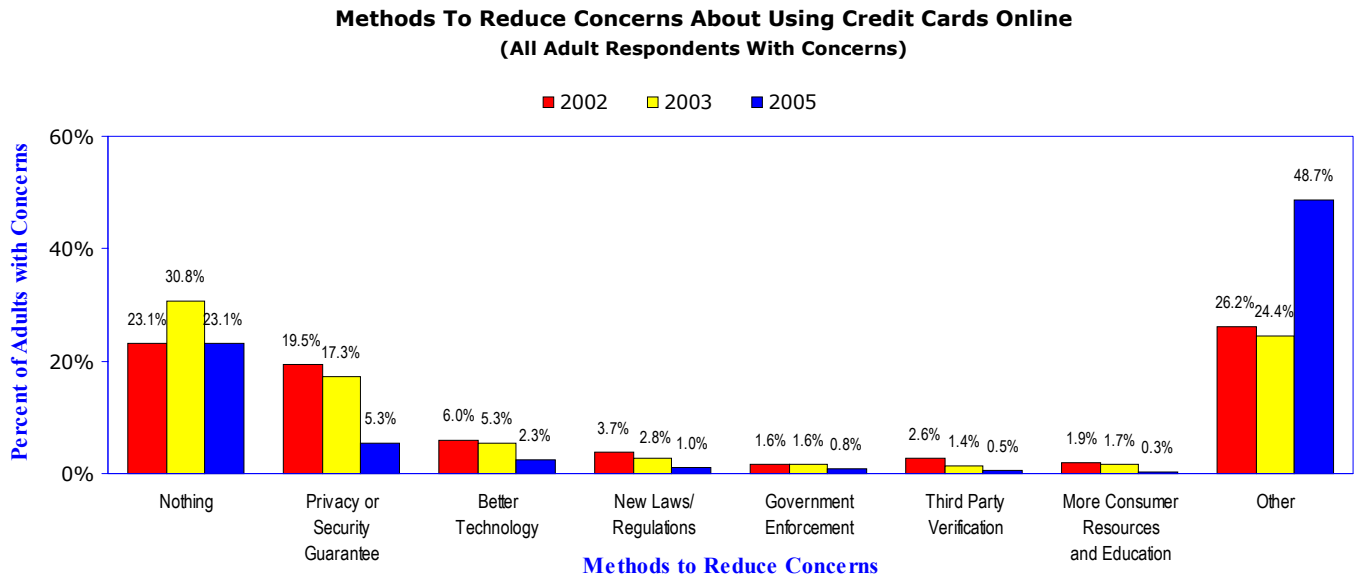


### What Would Reduce Your Concerns About Using A Credit Card Online?

Declining percentages of respondents are citing the most commonly mentioned solutions to reduce their concerns about online credit card security.

Moreover, in 2005, 23 percent of adult Internet users who express concerns about using their credit cards online (somewhat concerned, very concerned, or extremely concerned) say nothing will reduce their concerns – down from 31 percent in the previous study.

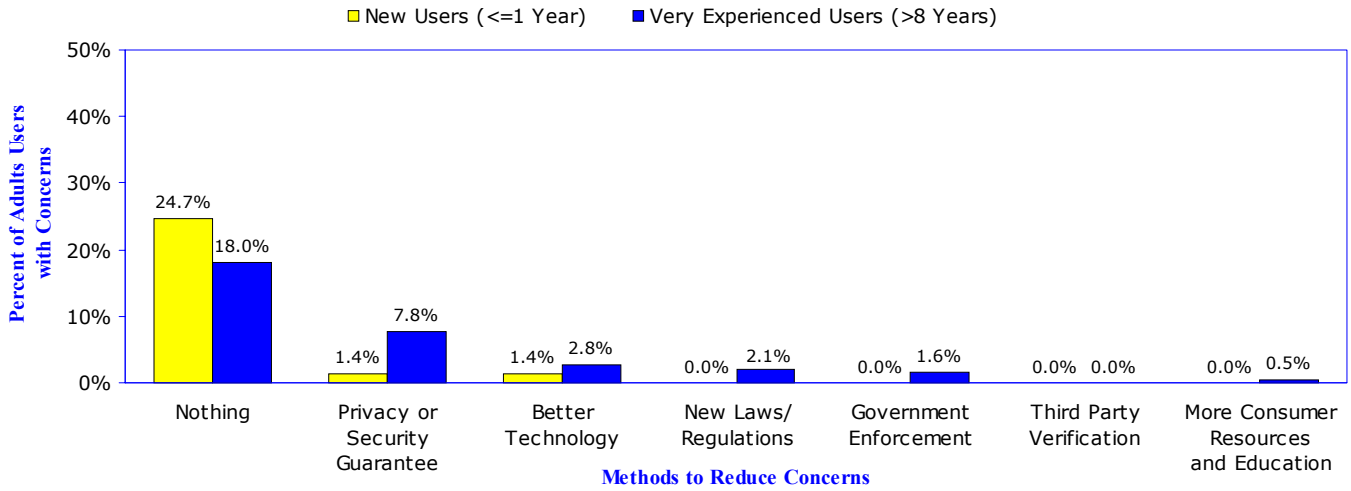
Almost half of users (48.7 percent) in 2005 report a wide variety of other solutions, categorized here as "other" – up considerably from 2002 and 2003.



### Reducing Concerns About Online Credit Card Security: New Users Vs. Very Experienced Users

Looking at potential responses to concerns about online credit card security – fewer of the very experienced users compared to new users say that nothing will reduce their concerns.

**Methods To Reduce Concerns About Using Credit Cards Online**  
(Adult Internet Users With Concerns -- Major Reasons)



# Communication Patterns

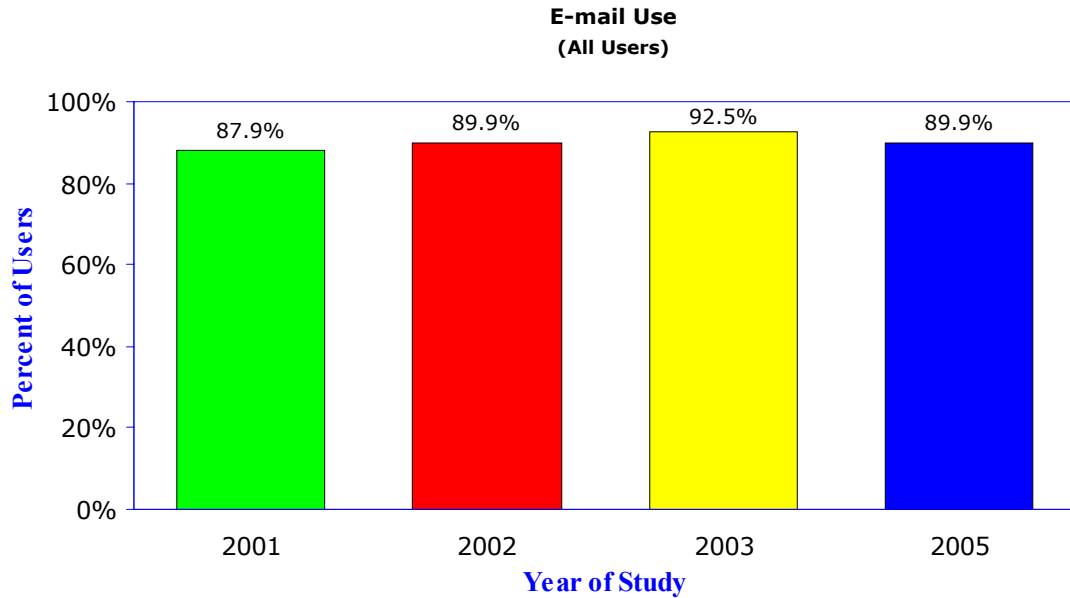
How is e-mail use changing as Internet use matures? Are users reporting changing views about how often they should check their e-mail?

Are most e-mail users checking their inboxes more than once a day? Should the standard response to e-mail be ASAP?

## Do You Use E-mail?

In Year Five of the Digital Future Project, e-mail use continues to be the most popular online activity. The percentage of e-mail users appears to have stabilized.

In 2005, about 90 percent of Internet users use e-mail.



Given that 78.6 percent of all Americans go online, and 89.9 percent of those users have e-mail, this means that 70.7 percent of Americans now use e-mail.

### How Often Do You Check Your E-mail?

Checking e-mail multiple times each day is increasingly becoming a habit.

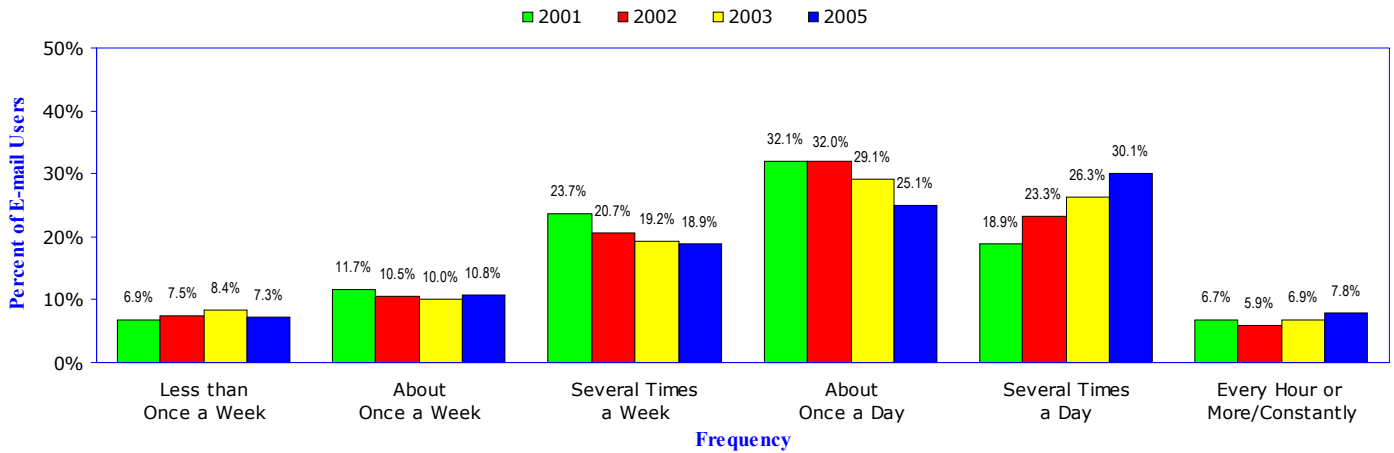
In Year Five of the Digital Future Project, an increasing number of e-mail users are checking their inboxes several times a day – or more.

Among e-mail users in 2005, 37.9 percent say they check e-mail several times a day, or every hour or more.

The percentage of those who check their e-mail only once a day or several times a week has declined throughout the four studies in which this question was asked.

The number of infrequent users of e-mail (once a week or less) has remained stable.

**How Often Do You Check Your E-mail?  
(All E-mail Users)**

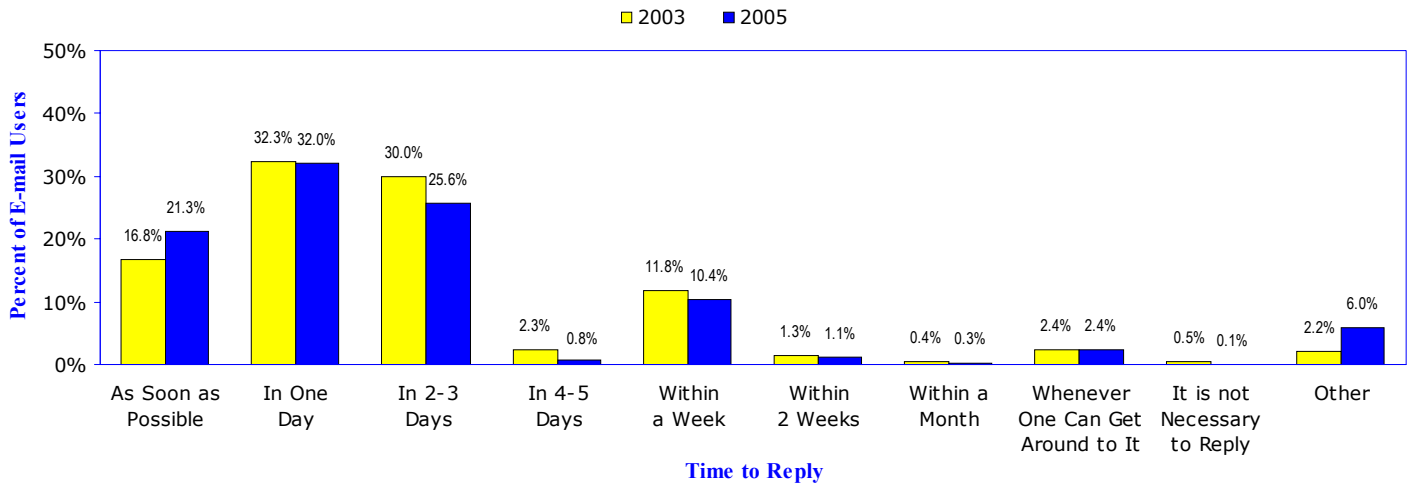


### How Often Should Users Check E-mail?

When asked how quickly one should reply to personal e-mail, the largest change in Year Five was the increase in users who say that replies should be sent “as soon as possible.”

More than half of e-mail users (53.3 percent) in 2005 say that replies to personal e-mail messages should be sent as soon as possible, or in one day. One-quarter of users have a more leisurely view, saying that personal e-mail replies should be sent within two or three days.

**How Quickly Should One Reply To An E-mail Message?  
(All Internet Users)**

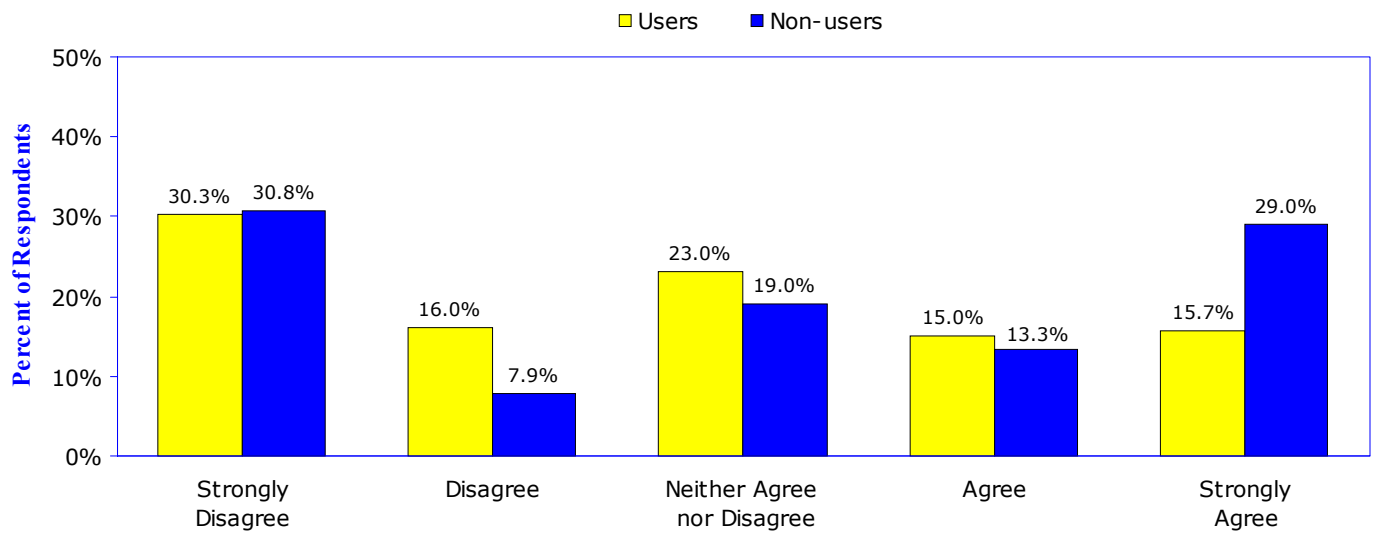


### E-mail And Social Courtesy

A large percentage of both users (46.3 percent) and non-users (38.7 percent) say that it is not appropriate for the recipient of a gift for a wedding, birthday, or holiday to send a thank-you by e-mail. However, more than 40 percent of non-users (42.3 percent) say that e-thanks for these gifts are appropriate.

A lower number of Internet users agree or strongly agree (30.7 percent).

**It Is Appropriate To Send A Thank-You For a Wedding, Birthday, Or Holiday Gift By E-mail  
(Internet Users and Non-Users)**



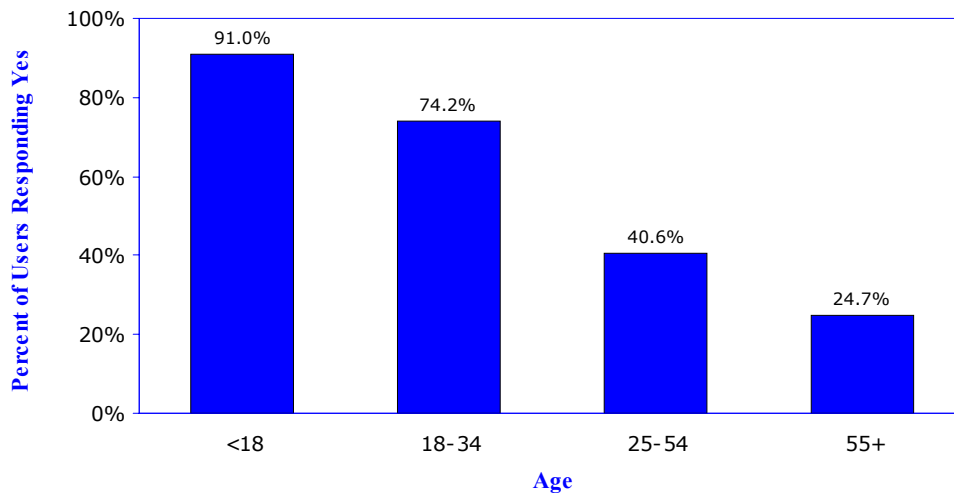
### Instant Messaging With More Than One Person

Instant messaging is one of the most popular online activities in Year Five (see page 23), and instant messaging with more than one person is increasing as well.

In 2005, of those Internet users who send and receive instant messages, 61 percent IM to more than one person at a time – an increase from 53 percent in 2003.

The highest percentage of those who send and receive instant messages from more than one person at a time is among users under 18. However, large percentages of users in all ages send and receive instant messages from more than one person at a time.

**Do you ever send and receive instant messages  
with more than one person at a time?  
(By Age)**

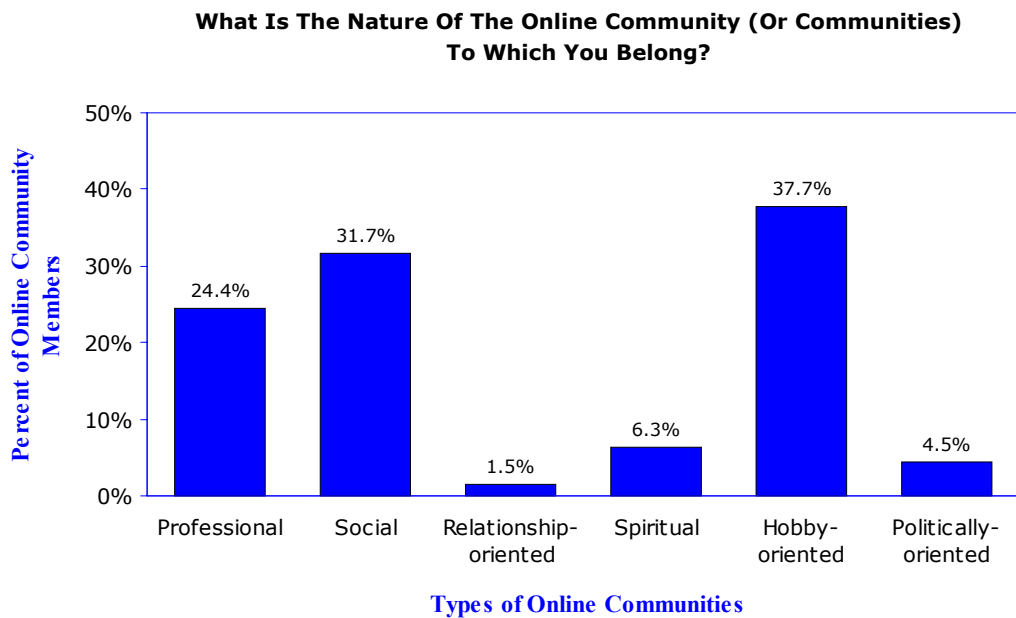




## Online Communities

In a new question for the Year Five Report, the Digital Future Project asked respondents about their involvement in online communities. (For the Digital Future Project, an “online community” is defined as a group that shares thoughts or ideas, or works on common projects, through electronic communication only.)

The largest number of respondents who participate in online communities in 2005 say their participation involves a hobby-oriented community. The next largest group reports involvement in an online community focused on social issues, followed by those who participate in a community for professional reasons.

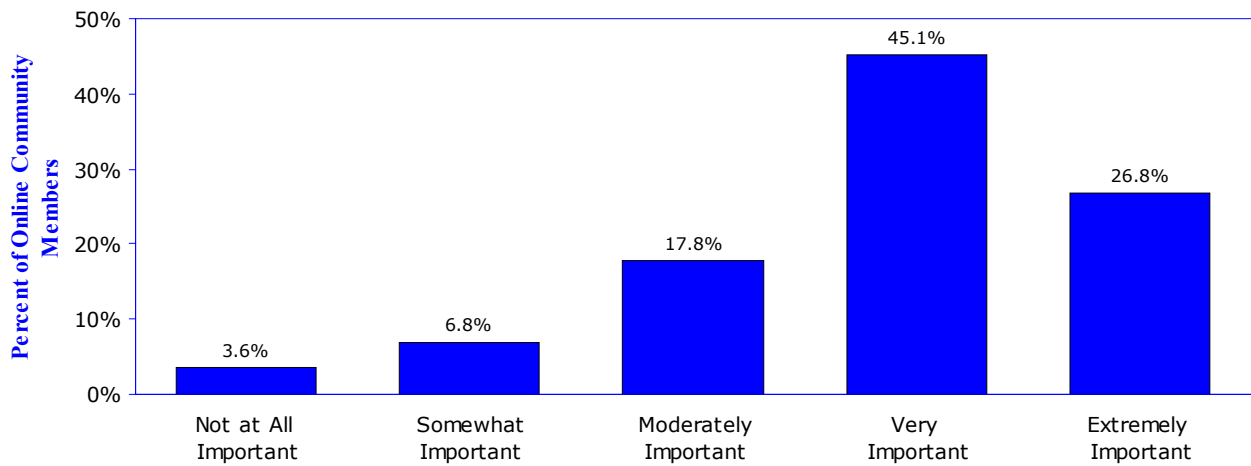


### Are Online Communities Important?

Most participants in online communities say their involvement is important to them.

More than 70 percent (71.9) say that their online community is very important or extremely important for them. Only a very small number (3.6 percent) say their online community is not important at all.

**How Useful And Important To You  
Is The Online Community (Or Communities) To Which You Belong?**



A deeper examination of online communities will be a continuing focus in the ongoing work of the Digital Future Project.

## Social Effects

Year Five of the Digital Future Project continues to explore a range of social and personal issues, including new questions about the Internet in military life, and the role of the Internet in political campaigns.

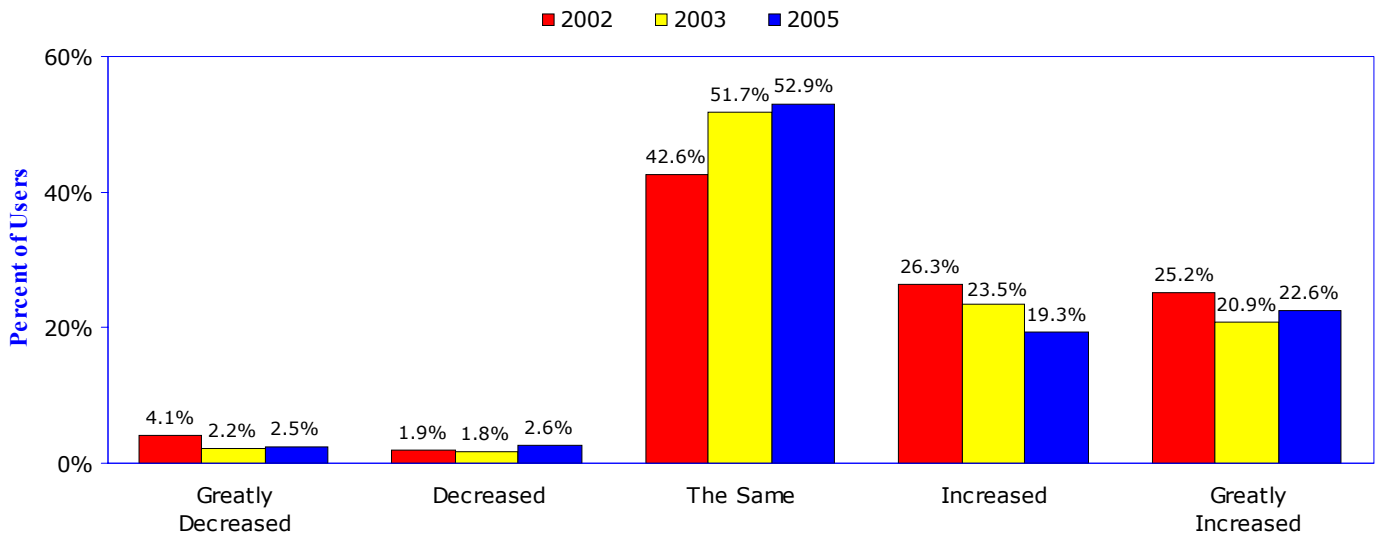
## The Internet, Family And Friends

### Does the Internet Affect Contact With Family And Friends?

In 2005, the majority of Internet users say that the Internet has no influence on the amount of time they spend with their family and friends.

However, more than 40 percent say that use of the Internet has increased or greatly increased contact with family and friends. Only a small number (5.1 percent) say the Internet has decreased this contact.

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



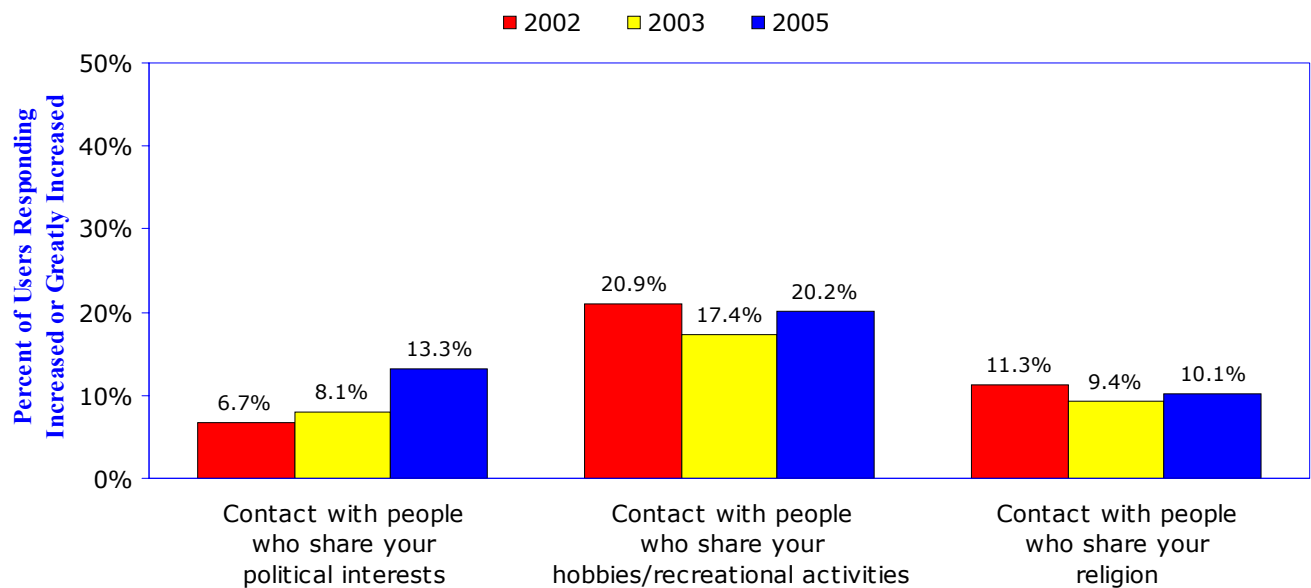
## Does The Internet Increase Contact Between People Who Share Interests?

Only small numbers of Internet users say that going online increases their contact with people who share their interests in hobbies, politics, or religion – findings that are generally consistent with those from previous years.

However, a modestly growing number of users say that the Internet has increased their contact with people who share their political interests.

For more questions about the Internet and the political process, see page 101.

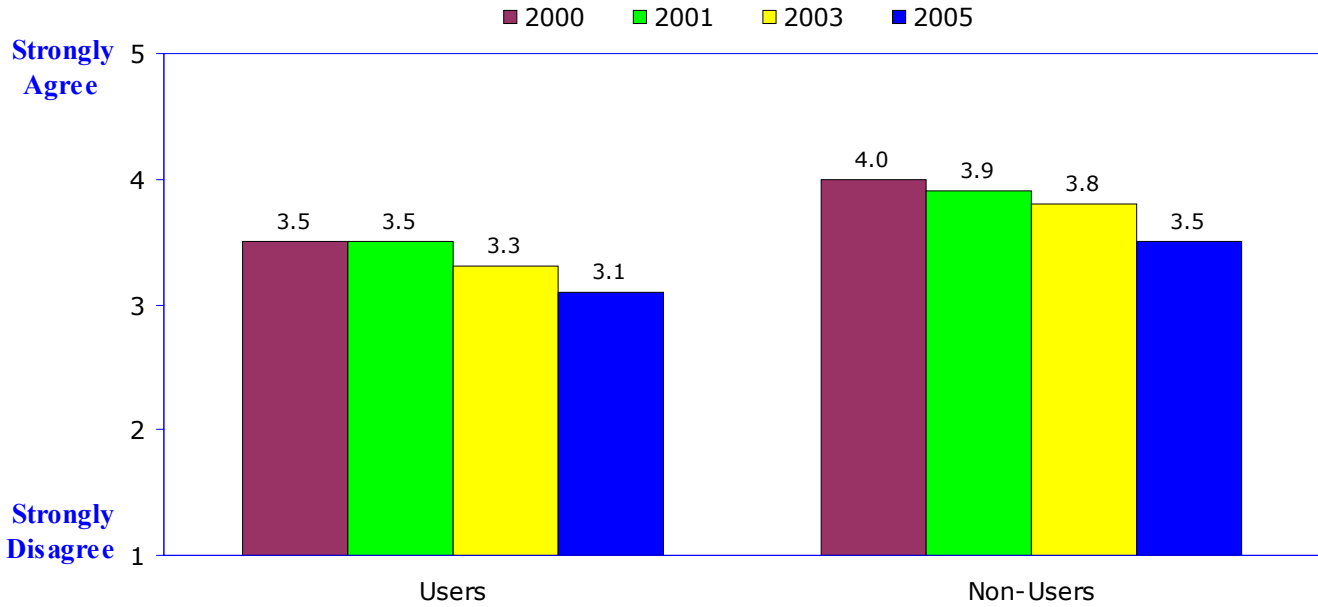
**The Internet: Increase or Decrease Contact With People Who Share These Interests  
(Internet Users)**



**Do Internet Users Spend Too Much Time Online?**

Internet users and non-users express moderate levels of agreement that people spend too much time online. However, those levels of agreement have declined in each of the four years this question has been asked by the Digital Future Project.

**Do People Spend Too Much Time Online?  
(Internet Users and Non-Users)**

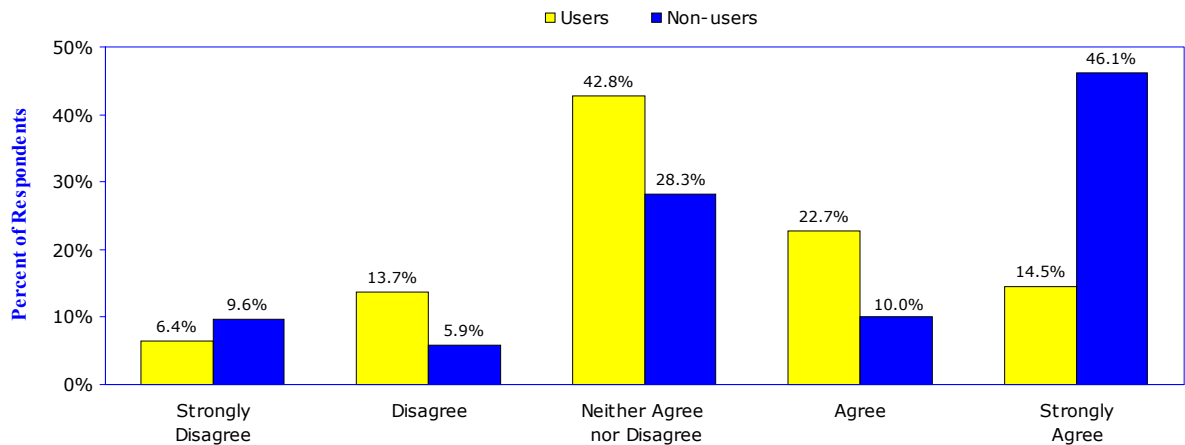


## Views About Time Spent Online

Taking a closer look at opinions about the time people spend online, findings in the Year Five study show that Internet non-users express the highest level of agreement with this statement; more than half of non-users (56.1 percent) agree or strongly agree that people spend too much time online.

At the same time, more than one-third of users (37.2 percent) also agree that people spend too much time online. Only 20.1 percent of users disagree that people spend too much time online.

**In General, You Feel People Spend Too Much Time On The Internet?  
(Internet Users and Non-Users)**



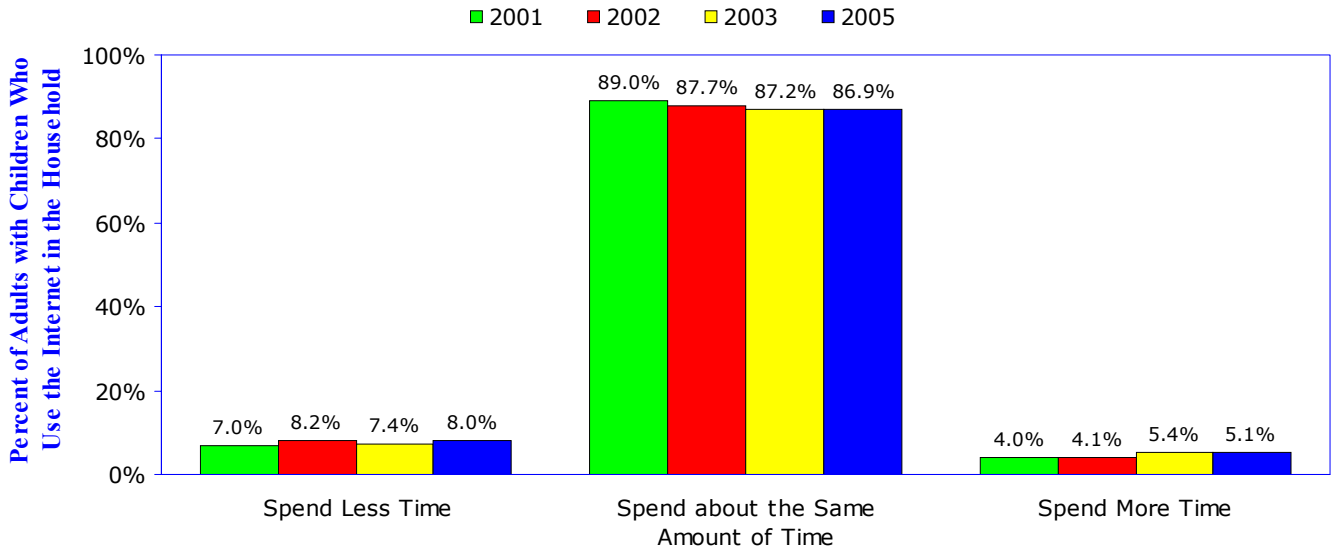
## Children And The Internet

### The Internet, Children, And Time With Friends

When adults are asked about the amount of time that children spend with their friends since their households gained access to the Internet, the responses have been remarkably consistent in the five Digital Future Project studies.

In general, most adults say that the children in their households spend about the same amount of time with friends since gaining home access to the Internet. A small but generally stable number (7-8 percent) say the children in their households spend less time with friends since home Internet access arrived.

**Since Your Household Gained Access To The Internet, Do Those Under 18 Spend Less Time, More Time, Or About The Same Amount Of Time With Friends?**



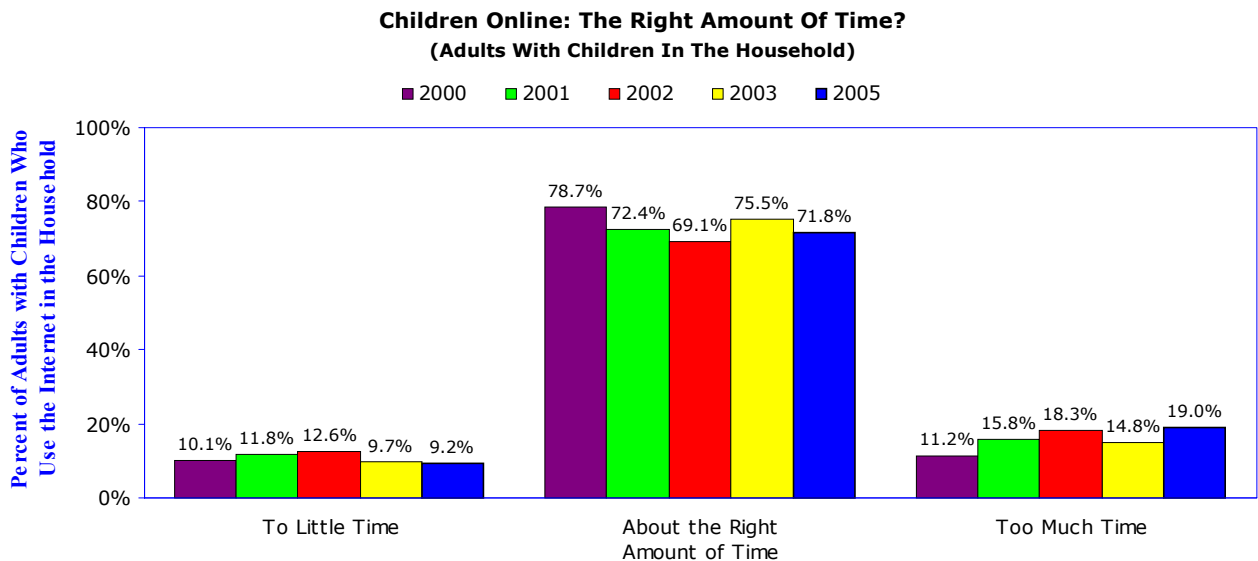


### Internet Use And Watching Television: The Right Amount Of Time For Children?

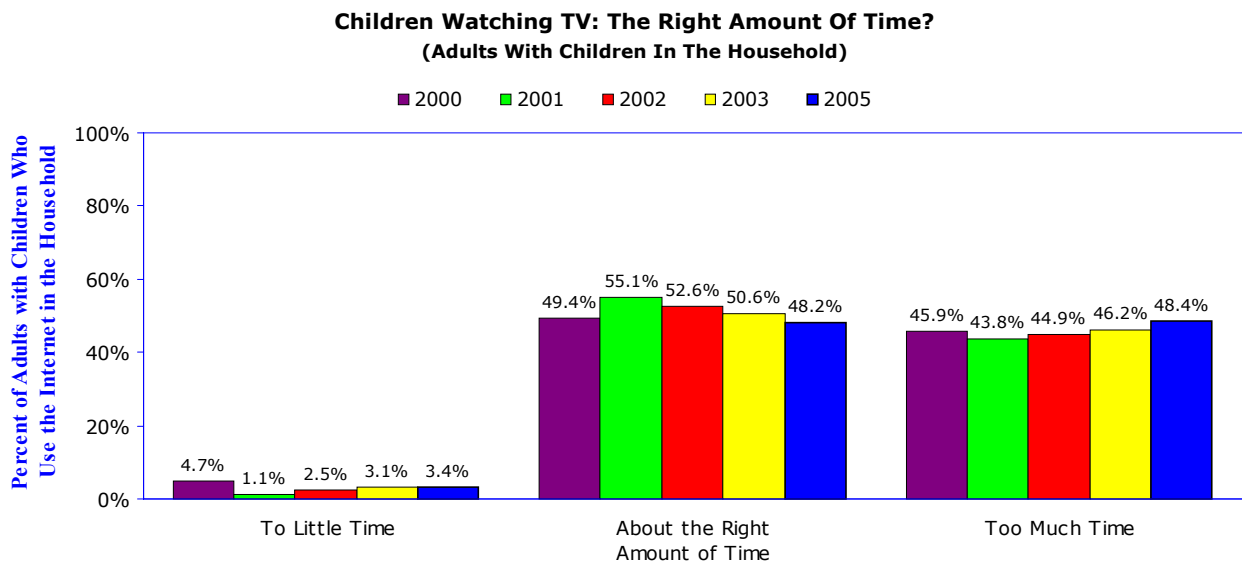
When adults are asked about the amount of time the children in their households spend going online or watching television, a small but growing number of respondents say the children are using the Internet too much.

In 2005, 19 percent of adults say the children in their households spend too much time on the Internet.

Most adults (71.8 percent) say that children in their households spend just the right amount of time online – a slight decline over the previous year. Less than half of adults say the children in their households watch just the right amount of television – a number that is also declining.



Almost half of adults (48.4 percent) say that children in their households spend too much time watching television – a number that has increased steadily over the last four years of surveys.



### Schoolwork And The Internet

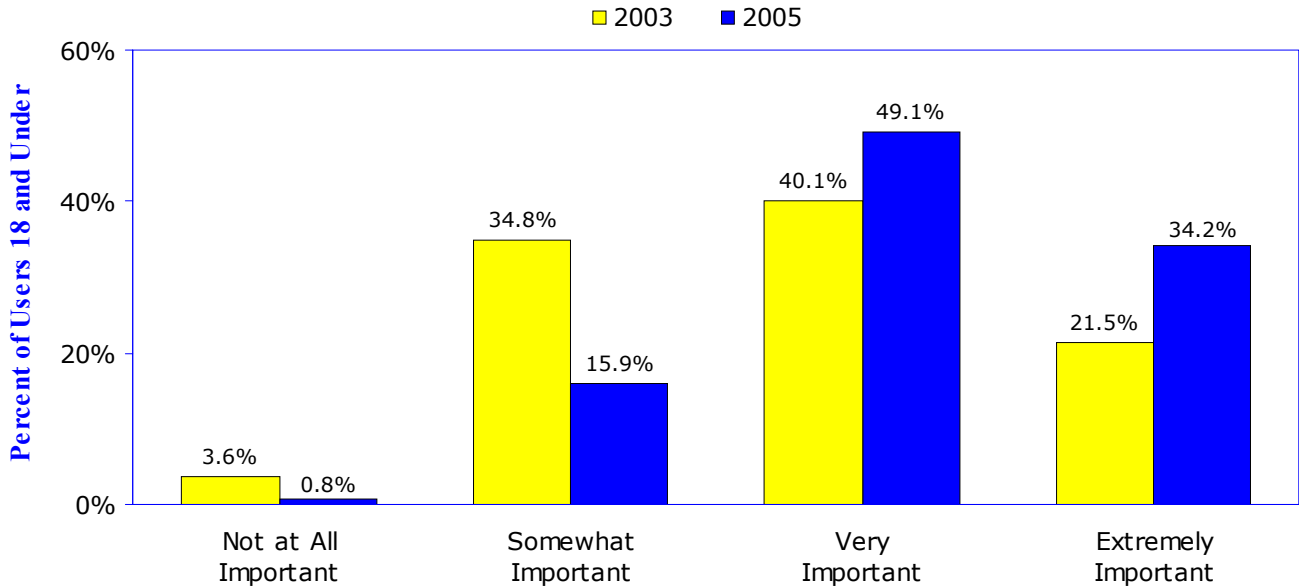
Children and adults express conflicting views about the importance of the Internet in schoolwork.

Internet users 18 and under believe that the Internet plays a major role in their schoolwork. In 2005, more than 80 percent (83.3 percent) say that going online is very important or extremely important – a large jump over the 61.6 percent who reported the same response in the previous study.

Almost no young users (0.8 percent) say the Internet is not at all important to their studies.

(See the next page for the adult view of the Internet’s impact on school grades.)

**How Important Is The Internet For Your Schoolwork?  
(Internet Users Age 18 And Under)**

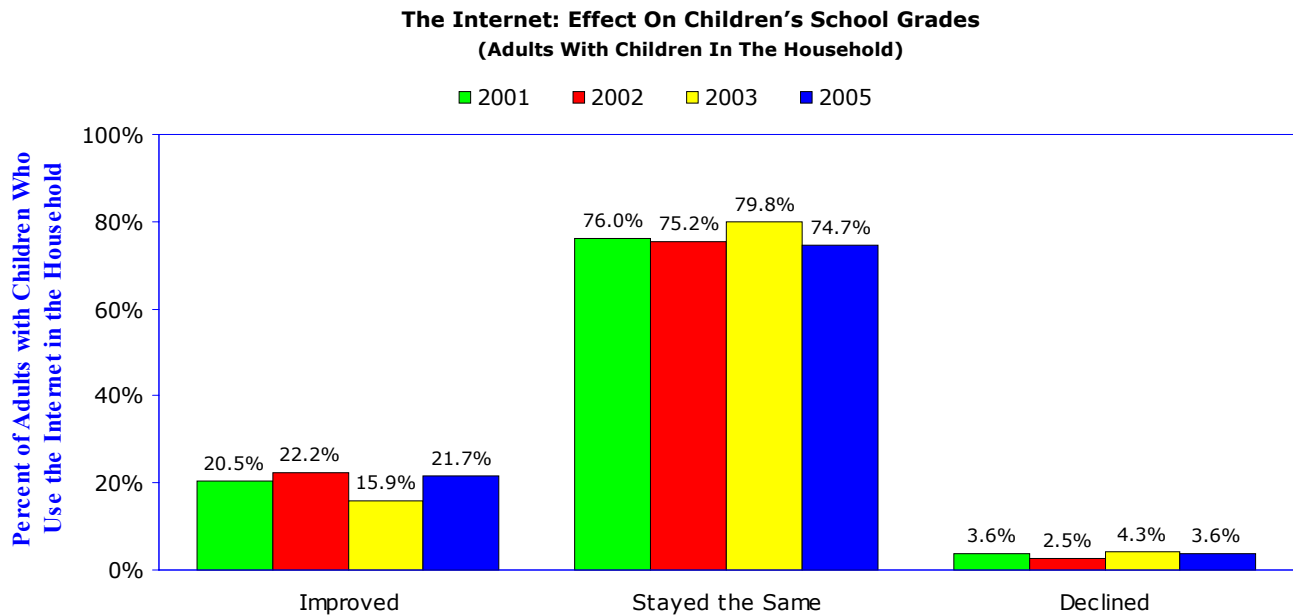


## Does Internet Use Improve School Grades?

While students continue to say that going online is a vital part of their schoolwork (see the previous page), the Internet is still not perceived by large numbers of adults as having any effect – positive or negative – on school grades.

In 2005, almost three-quarters of adults in the current study (74.7 percent) say that since their household acquired the Internet, the grades of children in their households have stayed the same.

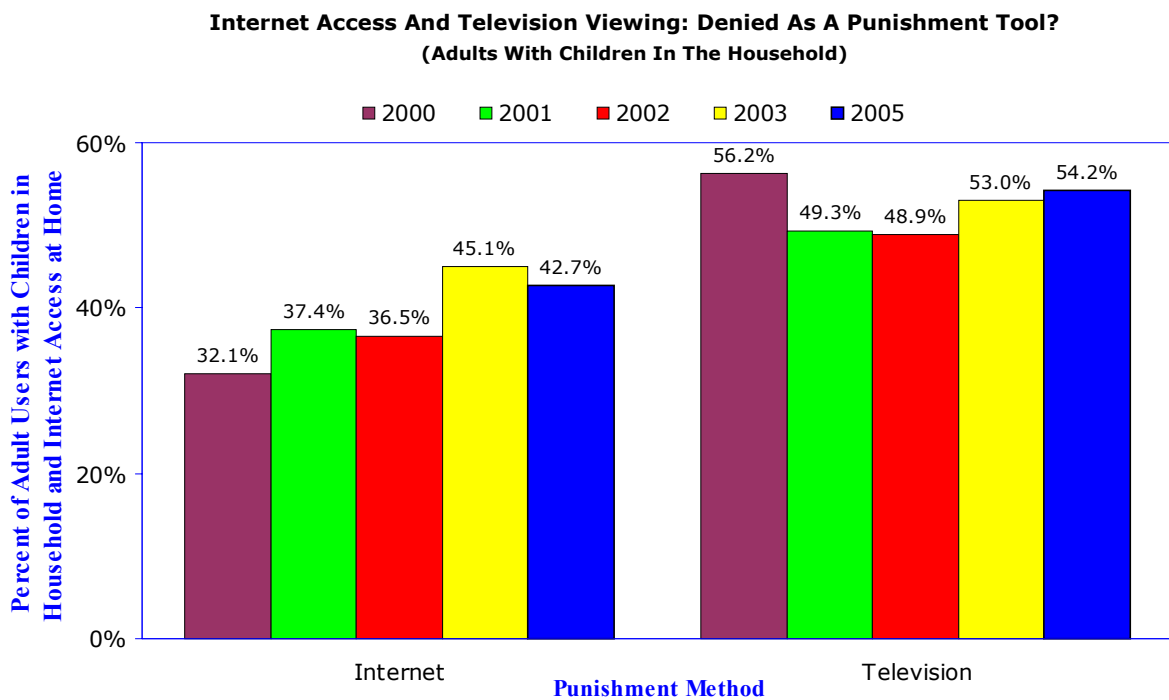
And, almost 22 percent of adults report that the Internet has positive benefits for the children in their households.



## Internet Access And Television Viewing: Punishment Tools?

Denying access to the Internet as a family punishment tool has increased overall since the Digital Future Project began, although this form of punishment decreased slightly in Year Five; 42.7 percent of adult users with children in their households say the children are punished by losing their online privileges.

Denial of television continues to be used more frequently than denial of the Internet as a punishment.



## Political Power And Influence

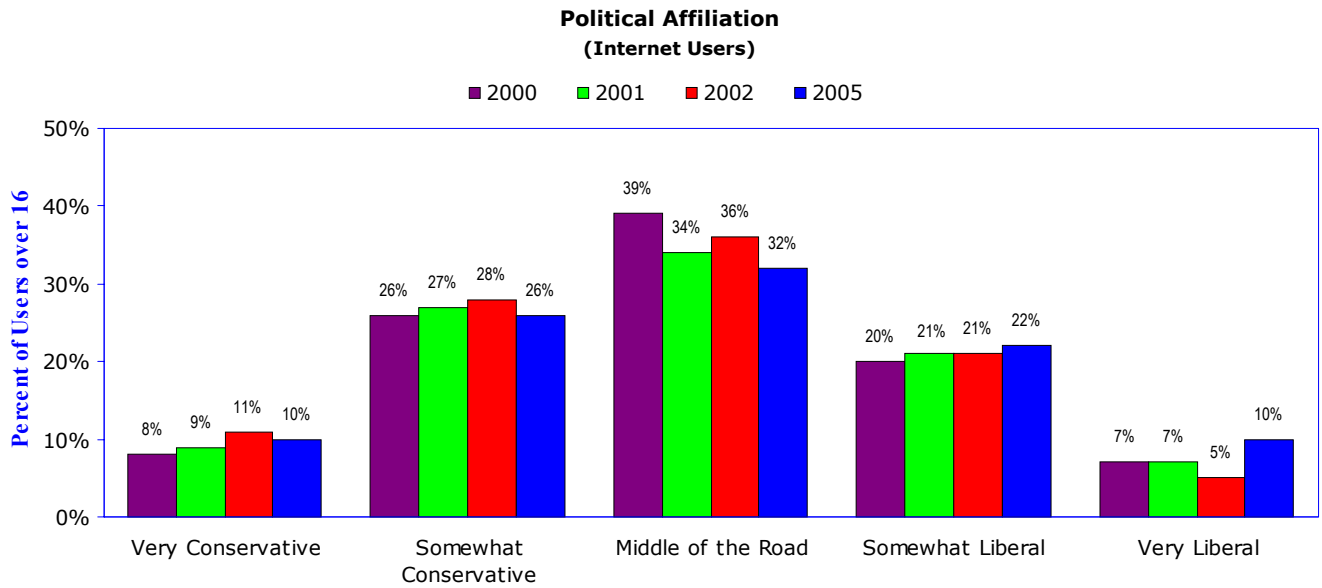
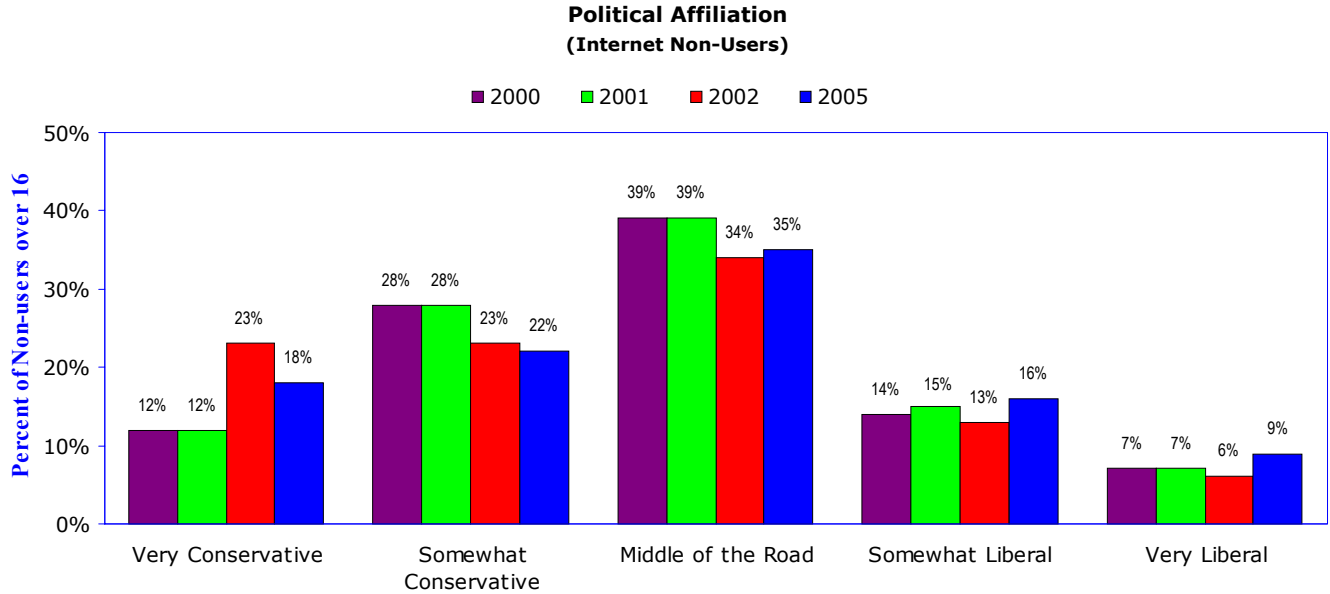
The political campaigns of 2004 marked the first time that the Internet played a comprehensive role in American elections. All of the major political candidates maintained active Web sites that served as the voice of the candidate, as well as an outreach tool to solicit funds and volunteers.

How have views changed about the role of the Internet in political campaigns? Do users think that the Internet gives people more political power?

**Political Affiliation: Internet Users And Non-Users**

Generally, Internet users and non-users have similar political affiliations – with the largest number of respondents saying they are politically moderate.

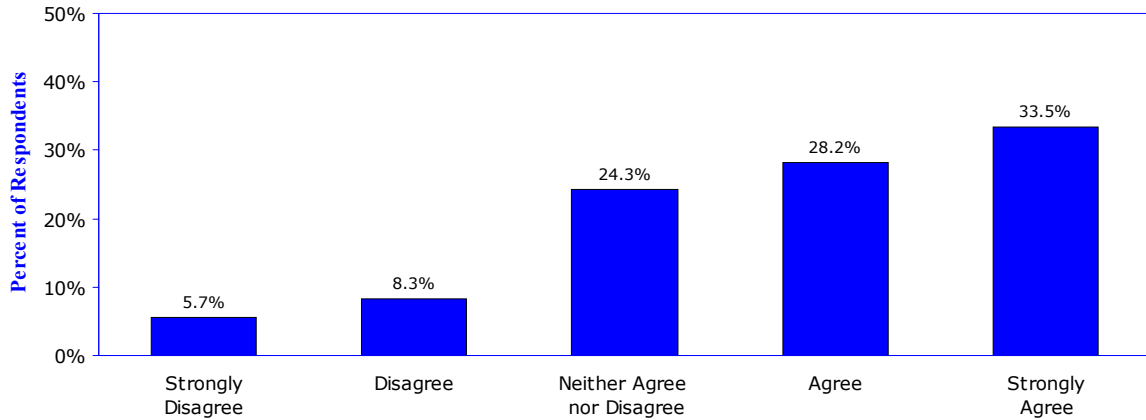
At the political extremes, more non-users than users identify themselves as very conservative. Larger numbers of Internet users compared to non-users say they are somewhat liberal.



### The Internet's Importance In Political Campaigns

Large numbers of respondents (61.7 percent) agree that the Internet has become important to political campaigns. Only 14 percent disagree with the Internet's importance in political campaigns.

**The Internet Has Become Important For The Political Campaign Process  
(Level of Agreement By All Respondents)**

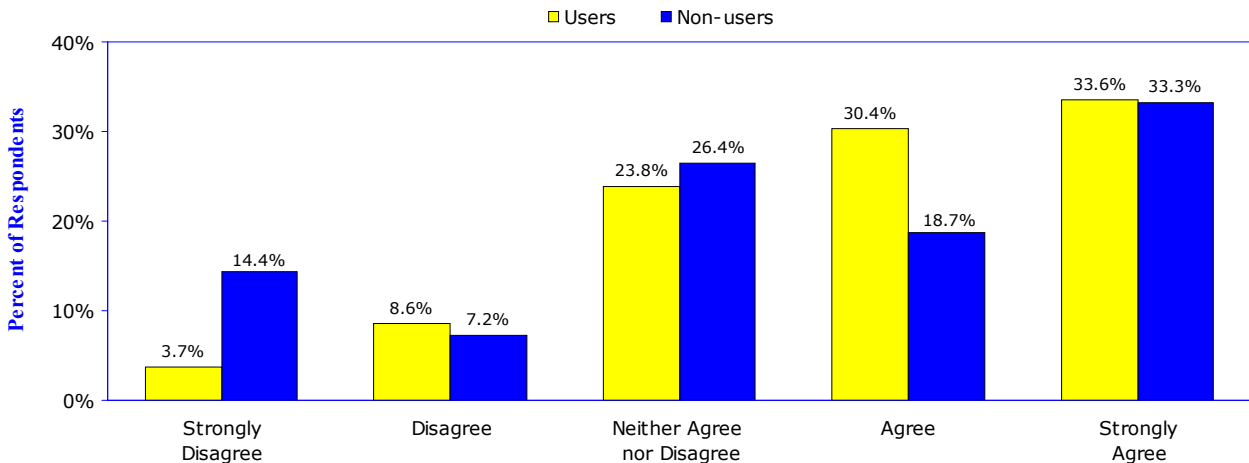


### The Internet's Importance In Political Campaigns: Users And Non-Users

Almost two-thirds of users (64 percent) agree that the Internet is important for political campaigns.

More surprising is that more than half of non-users (52 percent) also agree that the Internet is important for political campaigns.

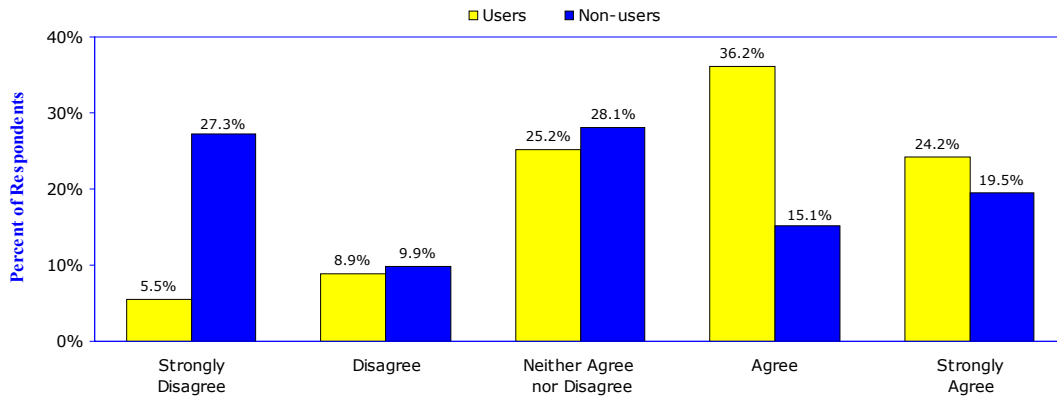
**The Internet Has Become Important For The Political Campaign Process  
(Level of Agreement By Users And Non-Users)**



### The Internet And Political Knowledge

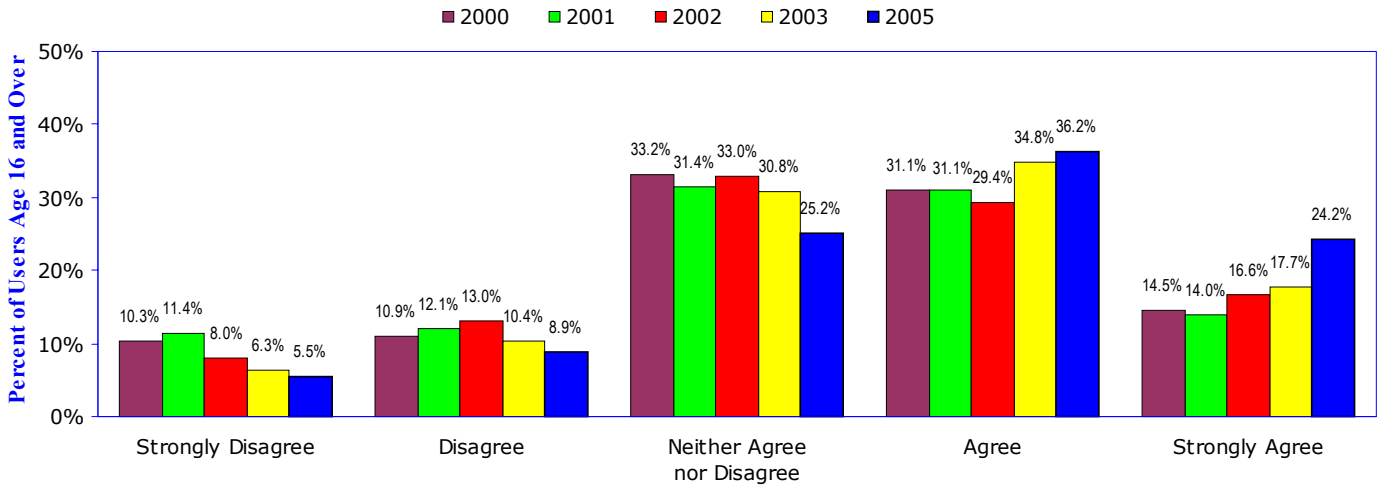
In 2005, belief that the Internet can be a tool for learning about the political process continues to increase, with 60.4 percent of users and 34.6 percent of non-users agreeing that by using the Internet, people can better understand politics.

**By Using The Internet, People Like You Can Better Understand Politics  
(Users And Non-Users)**



The 60.4 percent of Internet users in Year Five of the Digital Future Project who agree or strongly agree represents the highest level of agreement with this statement in the five years of the study.

**By Using The Internet, People Like You Can Better Understand Politics  
(Internet Users)**



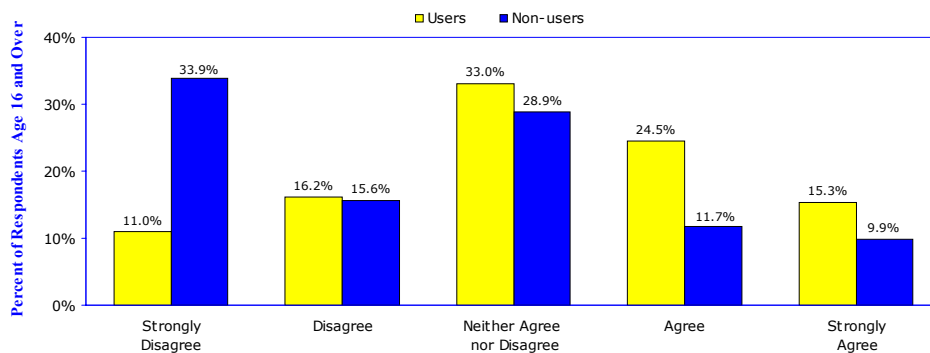


### Is The Internet A Tool To Help Gain Political Power?

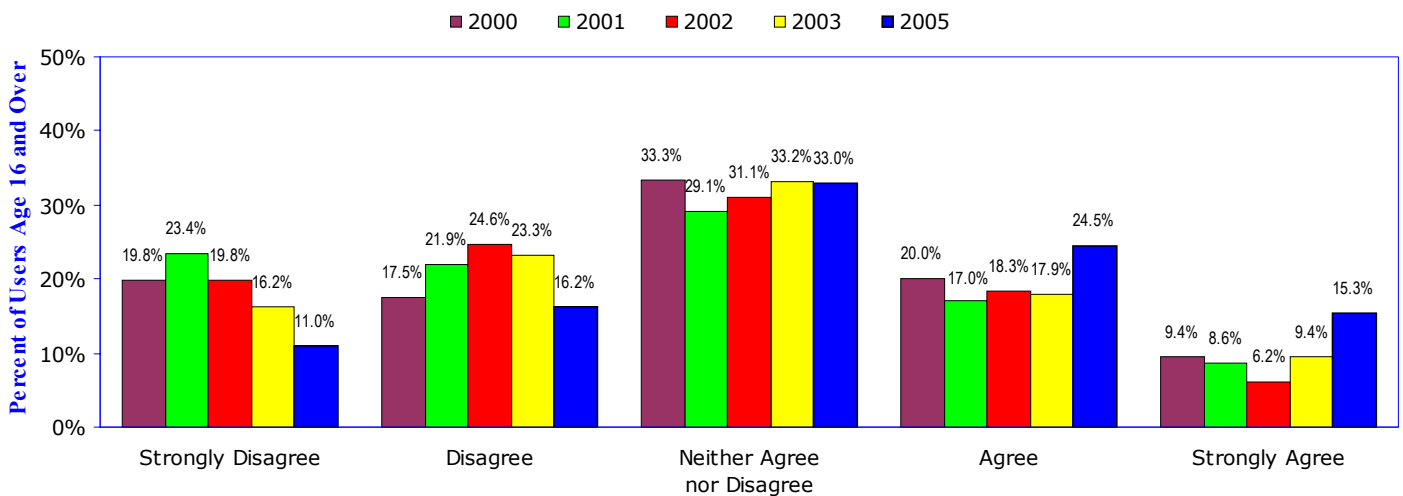
For the first time in the Digital Future Project, the number of Internet users who say that the Internet can be used as a tool to gain political power has begun to rise.

In 2005, 39.8 percent of users and 21.6 percent of non-users agree that the Internet can give people more political power. At the other extreme, almost half of non-users (49.5 percent) disagree with this statement.

**By Using The Internet People Like You Can Have More Political Power  
(Internet Users and Non-Users)**



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

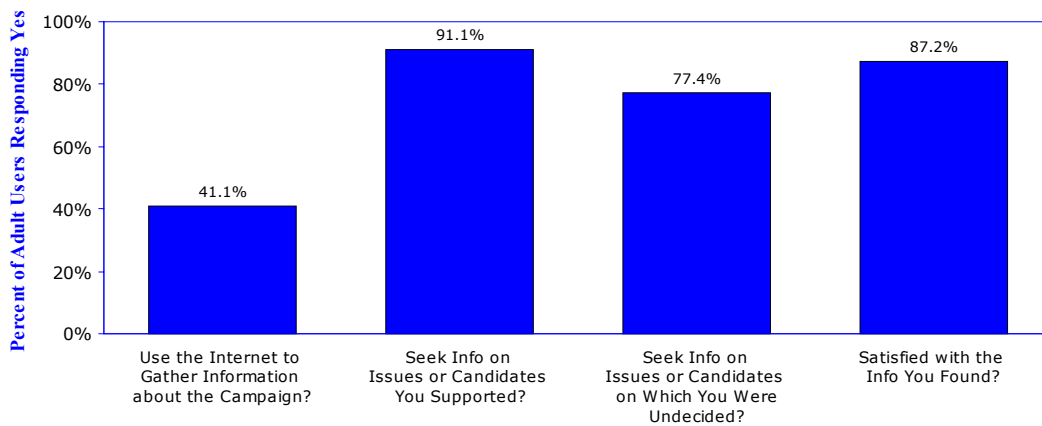


## Online Information And The Presidential Elections

Large percentages of Internet users went online for information about the candidates in the 2004 presidential election.

- More than 40 percent (41.1 percent) of Internet users went online to gather information about the presidential campaign.
- Of users who went online to seek campaign information, 91.1 percent sought information about issues or candidates they supported, while 77.4 percent sought information about issues and candidates about which they were undecided.
- Of users who gathered campaign information online, 87.2 percent were satisfied with the information about the presidential election they found online.

**The Internet As A Political Information Source**  
(Adult Internet Users Who Went Online To Gather Campaign Information)

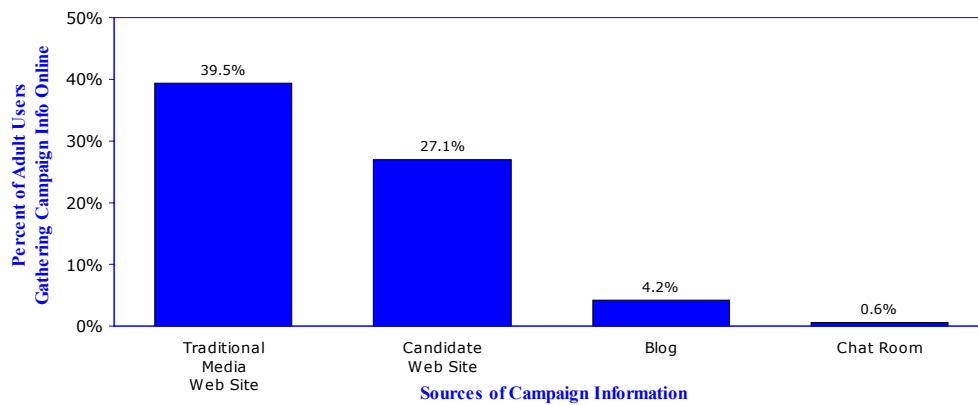


### Where Online Do Users Find Campaign Information?

Internet users use candidates' Web sites for information, but not as their primary source for campaign information.

The largest percentage of adult users who went online for campaign information relied on traditional media Web sites; a smaller group of users used candidates' Web sites.

**Where Online Did Users Go To Get Presidential Campaign Information?**



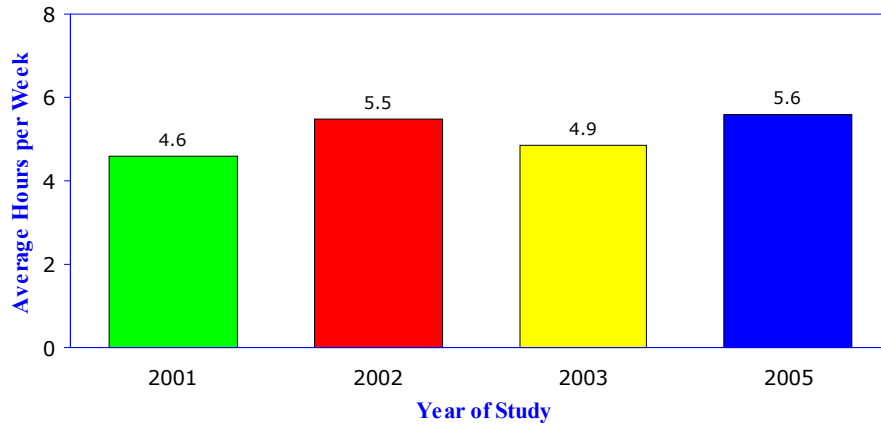
## The Internet At Work

### Using the Internet At Work: Hours Online

Use of the Internet at work for professional reasons is increasing in Year Five of the Digital Future Project.

In 2005, Internet users who go online at work say that they actively use the Internet for work an average of 5.6 hours per week – an increase from 4.9 hours in the previous study.

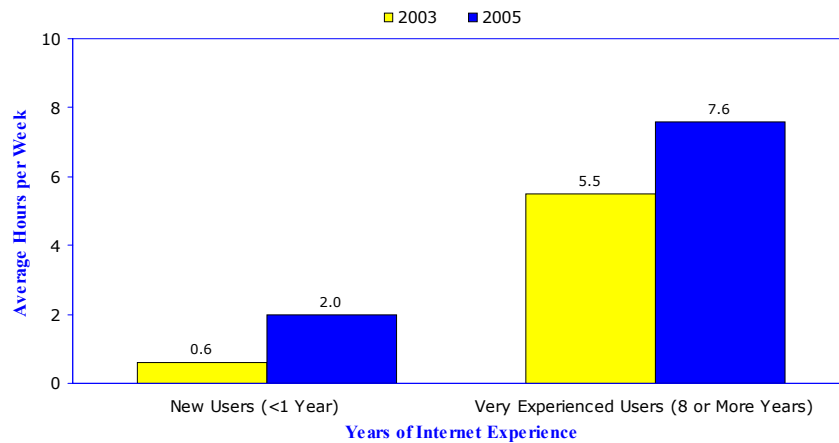
**How many of those hours that you are connected to the Internet at work, are you actively using the Internet at work per week?  
(Respondents With Internet Access At Work)**



### Using the Internet At Work: Hours Online For New Users And Very Experienced Users

In Year Five, very experienced users are actively online at work much more than new users – a finding consistent in the two years this question has been asked.

**How many of those hours that you are connected to the Internet at work, are you actively using the Internet at work?  
(New Users Vs. Very Experienced Users)**



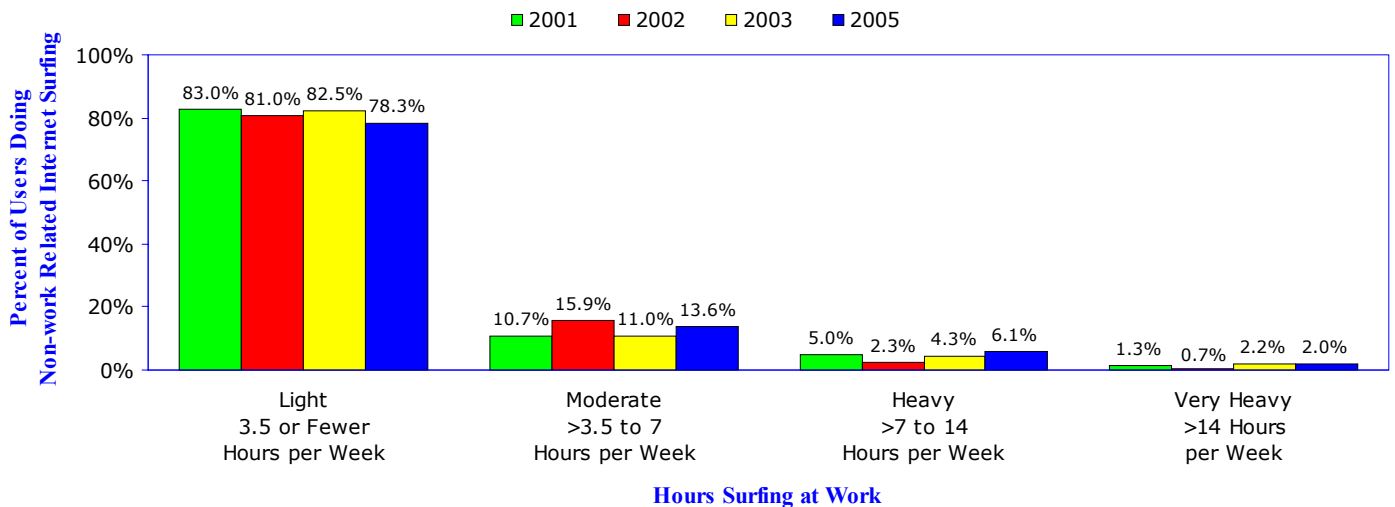
### The Internet At Work: Personal Use

Of users who have Internet access at work, 10.7 percent say they cannot visit non-work Web sites from their business computer.

Of the other 89.3 percent of users who can visit non-work Web sites from their business computer, the vast majority go online for 3.5 hours per week or less for non-work purposes – a level that remained generally consistent for three years, but dropped slightly in 2005.

The current study found small increases in Internet users who go online at work for personal reasons for more than 3.5 to 7 hours a week and more than 7 to 14 hours a week.

**How many hours at work do you spend doing non-work related Internet surfing, Internet chatting, instant messaging or reading or sending personal email?**



## Does The Internet Make Workers More Productive?

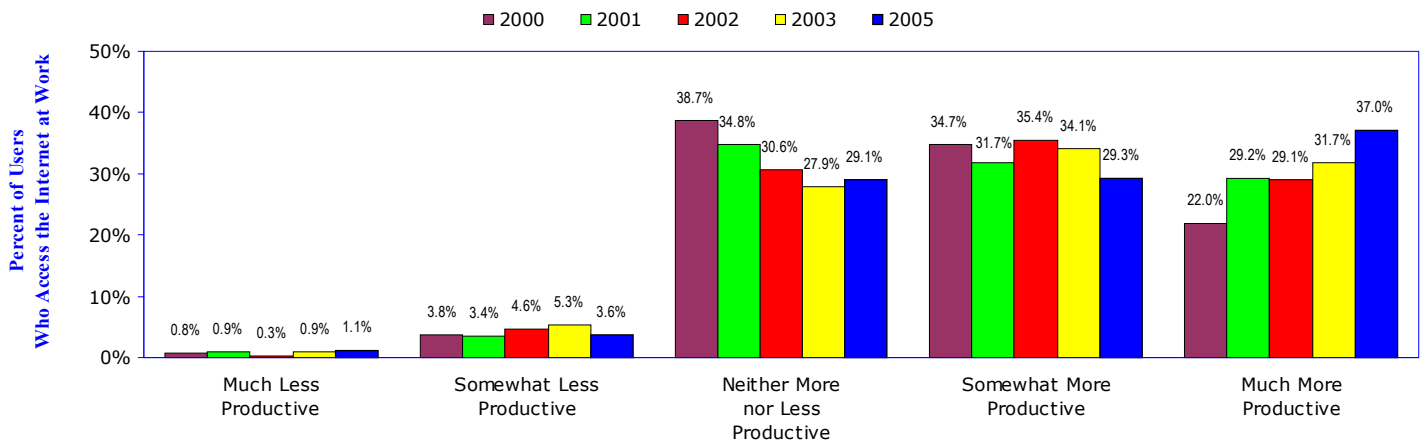
The percentage of users who say the Internet at work makes them more productive has continued to increase for all five years of this study.

In Year Five, almost two-thirds of users who have access to the Internet at work (66.3 percent) say that going online at work makes them somewhat more productive or much more productive, up from 65.8 percent in 2003, 64.5 percent in 2002, 60.9 percent in 2001, and 56.7 percent in 2000.

Those who say the Internet has made them much more productive increased to 37 percent, up from 31.7 percent.

Even though large numbers of respondents say they use the Internet for personal reasons at work (see page 109), less than five percent of those who go online at their jobs (4.7 percent) say the Internet makes them less productive.

**Internet Access At Work: Views About Productivity**



## The Internet And Military Life

The Internet is playing an increasingly important role in the social lives of military personnel. As electronic technology in all its forms shrinks the world, the role of the Internet among military personnel, and their family and friends, is becoming a key issue – especially with thousands of Americans deployed in a war halfway around the world.

Consider that:

- 31.8 percent of respondents say that they themselves, or a member of the family, or a close friend, are in the military.
- Almost one-fourth of respondents say that the member of the military in question is deployed overseas in a battle area.
- A majority of people in the military communicate with their family or friends back home by e-mail or cell phone.

For more about the Internet and the military, see the Trends section on page 112.

## *Trends*

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# *The Digital Future Project: Five Years Of Exploring The Digital Domain*

This report marks Year Five of the Digital Future Project – the fifth annual exploration of the opinions of Americans about the Internet, as well as behavior related to their online activities.

Last year, this report celebrated the 10th anniversary of online technology becoming generally available to the American public. Among many subjects, we discussed two issues about the Internet that were – and are – particularly noteworthy: first, a true understanding of change in America during the early 21st Century demands a comprehensive and continuing exploration of the Internet; and second, how little is yet understood about the impact of the Internet on America.

As an unfortunate sidelight to these issues, we noted last year – and continue to see now – that for many observers, the Internet’s role as a social phenomenon is vastly under-appreciated. Most media coverage of the Internet continues to focus on the technical aspects of online technology, the business potential, or the news coverage of “techno gloom and doom,” such as viruses, hacking, privacy fears, and the potential for terrorist exploitation of the Web. It is puzzling that the same media that explores the potential calamitous worldwide impact of online vandalism devotes so little time and attention to the positive social effects of this technology.

This report, part of a longitudinal study of a large group of Americans year after year, strives not only to build clarity about the impact of the Internet on the United States, but also to raise new questions as they emerge. We are especially interested in the Internet’s role as an active, participatory social medium (as opposed to the generally passive involvement associated with watching television or movies).



Now, as the second decade of Internet access has begun, 78.6 percent of Americans use the Internet (page 22). Online technology is used by almost two-thirds of Americans in their homes (page 22). Americans are more involved than ever in using the Internet; more than half of Americans have been going online for 5+ years (page 27), and they grow more comfortable with online technology with each passing year (page 31). If forced to give up a technology, Internet users say that they would be more willing to relinquish their cell phones or television before they would give up the Internet (page 47).

Even as the Internet has matured as a common technology, the questions that are raised by its presence in our lives are more elaborate and intriguing than ever. The issues that surface in our exploration continue to evolve and take new directions. Here are some of the trends related to the use and non-use of the Internet and digital technology that are emerging in Year Five of the Digital Future Project.

\* \* \* \* \*

### **The Internet, Expense, And Non-Users**

The idea that cost is a deterrent to going online lingers in the Digital Future Project for 2005, but the issue is changing. Last year, as the first subject in our “Ten Years Ten Trends” section, we explored the changing nature of the digital divide. At that time, when more than three-quarters of Americans used the Internet, we pointed out that the “digital divide” in America is nearly closed, *if* one describes that gap by its simplest definition: those who have access to the Internet compared to those who have not.

Now, even with more than 78 percent of Americans going online, the questions of Internet haves vs. the have-nots continue to be an issue of debate. In 2005, the fastest growing use of the Internet is among Americans at the lowest income levels (page 30). And, the number of non-users who say the Internet is “too expensive” has declined substantially (page 42). However, for many non-users, the lack of a computer is still cited as a main reason they don’t go online (page 42). Similarly, the primary explanation that electronic dropouts cite for no longer using the Internet is “no computer” (page 43). In 2005, a powerful, brand-name computer and monitor can be purchased for under \$300 – less than a modestly-priced television – and online access (through a modem at least) costs less per month than a pizza. Can expense truly be a main reason for sustaining the traditional digital divide?

While the issue of expense remains a concern for some non-users, perhaps the primary reason why almost 22 percent of Americans don’t use the Internet has less to do with costs and more to do with lack of knowledge or interest. Among Internet non-users, 17 percent said they don’t go online because they don’t know how (page 42), and another 17 percent said they simply aren’t interested. And, of those who once used the Internet but no longer do, almost half say they miss nothing about going online (page 44).

Regardless of the reasons why people don't go online, the primary point is that almost one-fifth of Americans don't participate in the technology that has become the accepted standard for information access and communication. How will the views and behavior of this non-user base be affected as the Internet becomes even more ingrained in American life?

### **The Growing Impact Of Broadband**

The issues that emerge from the growth of broadband access to the Internet – defined in this study as cable, DSL, ISDN or T1/T3 – cannot be overemphasized in this study. In Year Five of the Digital Future Project, for the first time the telephone modem is no longer the most common type of Internet connection. Access to the Internet through a broadband connection represents about 48 percent of connections for home Internet users, while telephone modem has dropped to 45.6 percent (page 31).

In last year's report, we emphasized that just as the emergence of the Internet transformed American culture, the growth of broadband use will inspire change of its own. The spread of broadband technology will create its own shifts in how we experience the Internet at home – and by extension, how home life will change as a result. In Year Five, we are seeing how those changes are evolving.

In 2005, broadband users spend more hours online than modem users working on their jobs at home, reading news, playing games, tracking their checking accounts and credit cards, and instant messaging (page 34). At the same time, modem users spend more hours online shopping, searching for jobs and classified ads, sending and reading e-mail, seeking information on hobbies, Web browsing, doing schoolwork, and looking for medical information.

These differences raise their own set of questions. For example, in general broadband users spend more time online than modem users, but because of the speed of access, many online tasks (such as e-mail and downloading large files) require less time. Are modem users spending more online time shopping because they are more interested in shopping, or because shopping takes longer through modem access?

### **Surfing The Web**

The Year Five study found that more than 70 percent of Internet users will sometimes or often go online without a specific destination in mind. That high percentage of users who go online for no reason other than to explore the vast scope of online offerings underscores a point that has long been obvious but deserves ongoing observation: how Web "surfing" shapes interests, needs, and contact with others.

When the Internet became generally available to the public more than 10 years ago, it was generally considered a "content medium" – users went online to seek specific information or services. But now more than ever, the Internet has become a "user-driven medium" that expands horizons in any direction that users want to go.

Perhaps even more important, the Internet serves as its own form of motivation; Web surfers stumble across information or activities that they could never have anticipated before going online. Now that Internet surfers in the second decade of online access literally have the world at their fingertips, what doors will that open?

## **The Internet And Politics**

Last year, this report raised the question, “Will the Internet’s potential as a tool for political power ever be realized?” That question was based on responses in the first four years of the Digital Future Project, which consistently showed that Internet users believed that going online was a tool for learning about the political process, but it was not then perceived as a medium that can help users gain political power or more say in what the government does.

Now, for the first time in the Digital Future Project, the number of Internet users who say that the Internet can be used as a tool to gain political power has increased (page 105). Moreover, large numbers of respondents (61.7 percent) agree that the Internet has become important to political campaigns; perhaps surprisingly, even a majority of non-users agree that the Internet is important for political campaigns (page 103).

The political campaigns of 2004 marked the first time that the Internet was a major communications vehicle in U.S. elections. Voters took advantage of this; 41.1 percent of Internet users went online to gather information about the presidential campaign. Notably, the largest percentage of these users sought campaign information on traditional media Web sites; a much smaller group used information placed online by the candidates (page 107).

The Internet’s potential role in political decision-making cannot be underestimated. More than three-quarters of users who went online for political campaign information sought insight regarding issues and candidates about which they were undecided (page 106).

Clearly, the Internet’s role in the American political process will continue to grow, and it could have a significant impact during the Congressional elections of 2006. The Internet is providing a direct conduit through which office seekers can reach voters, without media gatekeepers sifting and interpreting politicians’ messages. This alone raises many issues. While the Internet creates an open forum for delivery of information, it can be used just as easily for responsible campaigning or as a platform for political mischief and miscommunication. How will the growing role of the Internet shape the political campaigns of elections to come?

## **Internet Vs. Retail**

The role of the Internet for purchasing – and its impact on traditional retailing – continues to expand. On the increase are the number of Internet purchasers, their average number of purchases, and the average dollars they spend online (pages 63 and 64). Three-quarters of Internet users say their online purchasing has reduced their purchases in traditional retail stores (page 68), and the percentage of online purchasers who say their retail buying has been greatly reduced has now reached its peak in the five years of this project.

Even the chronic bugaboo of online purchasing – concern about credit card security online – is changing. For example, the number of users who have postponed buying on the Internet because of credit card concerns has declined (page 67). Although concerns about credit card security remain high, those levels of concern may be stabilizing (page 77). And, while very large numbers of respondents remain concerned about credit card security while online, the primary reasons for that concern that were cited in the previous studies – such as hackers, personal experience, too many unknowns – are, in Year Five, given less frequently (page 80).

The potential effect on traditional retail will be tremendous, not just in influencing who buys where, but what they can buy as well. Already several retail chains are closing marginal brick-and-mortar outlets in part because they are expanding their Internet offerings and online marketing. As the Internet continues to change buying habits, how will that shift change retail sales in America?

### **Original Online Content**

The distribution of original content on the Internet by individuals is increasing. Through blogs, photo pages, and personal Web pages, Internet users are offering themselves to the world – if anyone is willing to take a look. And, the posting of personal Web pages reveals real growth in online entrepreneurship; more than one-quarter of personal Web pages are posted by users who want to sell something (page 41).

Whether the reason for creating online content is to share personal experiences or to make money, the escalation of personal postings on the Internet is a trend that is worth exploration. Blogs, because of their endless variation and growing popularity, may prove to be particularly interesting – even if, as some speculate, the perceived extent of their impact on communications and networking proves to be inflated.

Currently, blogs are much like public access cable programs; they provide informal pipelines of information and opinions for anyone who wants to create them, but any single blog is unlikely to have significant societal impact. But a blog can serve as a catalyst to inspire others to inquire about an issue. These others can then form their own “critical mass” of interest that mainstream media can subsequently explore more deeply and take to a broader audience. As blogs continue to evolve, will they gain more influence? Might they emerge as their own unique type of mainstream media?

### **Internet Credibility**

An issue closely related to the growth of personal Internet content is the credibility of information posted online. After five years of studying beliefs and opinions about online technology, the Digital Future Project continues to find that overall, the Internet maintains a solid position as the most important source of information for most users. However, the percentage of users who think that most or all of the information online is reliable and accurate has declined for three years in a row (page 49).

The reason for the decline? As a possible cause, one can look to the information posted by individuals. Most of the primary online sources are given high rankings. Internet users report high levels of reliability and accuracy of information on their favorite Web sites (page 53), as well as for material found on sites hosted by established media and the government (page 54). Search engines are also trusted. Almost two-thirds of users say that most or all of the information produced by search engines is reliable and accurate, and more than 70 percent say that their search engine often provides the results they want (page 55).

Yet in the views of users, information posted by individuals is often unreliable; little more than one-tenth of users say information posted by individuals is reliable and accurate (page 54).

With the proliferation of information posted by individuals, will users' negative views of that information affect the perception of the Internet overall? One trend in particular could evolve into a larger credibility problem for the Internet. How will views of the Internet be affected as information posted by established organizations is blending with individual input – such as on “Wiki” pages (Web sites designed to allow users to create and edit the content) or traditional Web pages that allow contributions of information by users without oversight (several major entertainment and information Web sites fall into this category).

Some Internet observers would say that a Wiki page – by allowing users to create and edit the work of others – can energize content and encourage valuable input from users without technical expertise. Others, however, might counter that input without oversight may well produce online information that is not reliable. Given the extremely low credibility of information posted by individuals, how will this blending of Web information affect the credibility of Web sites – or of information on the Internet in general?

## **The Military And The Internet**

In 2004, the Center for the Digital Future began working with the U.S. Department of Defense to explore the role of the Internet in military life. Online technology questions for the military are critical to the safety of soldiers and sailors, as well as to the personal well-being of themselves and their families.

While the issues concerning the military and the Internet are many and varied, in general they focus on contact between armed forces personnel and the home front. For example, during the Vietnam War, the average soldier was allowed to call home every two months for about five minutes; today, soldiers in Iraq – with personal cell phones, e-mail, and the Internet – contact their families an average of twice a day. What could an enemy learn by monitoring those phones calls? Or, if those cell phones and e-mail accounts are abruptly cut off before a major military operation, what does the blackout tell an enemy? A majority of people in the military communicate with their family or friends at home by e-mail or cell phone (page 111). Can military operations be conducted effectively if troops in the field are using new technology to remain actively involved in family issues, paying bills, arguments about leaky roofs, or school problems?

When soldiers and sailors are asked what would most improve the quality of life in the field, the overwhelming response is improved communication with their families. However, where preserving national security and increasing safety for military personnel is concerned, is it possible that there can be too *much* communication?

## The Speed Of Change

Finally, perhaps the most vivid illustration of how the Internet and related technologies are affecting American life comes from observing the sheer speed of changes in behavior, technology, and products. Ownership of digital cameras has doubled in only three years, and use of hand-held computers or PDAs has also dramatically increased (page 37). Of the Americans who participated in the Digital Future Project this year, 71 percent own a cell phone. The extraordinary speed of the Internet's growth is a point worth repeating (page 28) – especially the change in Internet use in American households. In 1995, 21 percent of Internet users had online access at home. Five years later, the first study by the Digital Future Project found that home access had increased to 46.9 percent of users. This year, almost two-thirds of Americans can access the Internet at home (page 28).

This onrush of change has unexpected implications. Now, photographs can be shot and posted on the Internet within seconds. When the London transit system was bombed in July 2005, some of the first images of the attacks that were broadcast came not from professional journalists, but from eyewitnesses who had cameras in their cell phones. When Hurricane Katrina caused the largest natural disaster in American history, the Internet became a haven for well-wishers, searches for lost relatives, information about local closures, and even real-time, first-hand appraisals of the meltdown of emergency operations. With most social services in disarray and little emergency support in the first few days after the storm and floods, the Internet became one of the few safety nets available to victims for support and access to the outside world.

The exploration of these changes will continue to be a major priority in the ongoing studies of the Digital Future Project.

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## Supplement 1

### The USC Annenberg School Center for the Digital Future

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

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

The Center is based in the Annenberg School for Communication at the University of Southern California. Until July 2004, it was housed at UCLA in the Anderson Graduate School of Management.

In October 2000, the Center released the first report on the Internet, the beginning of an international, long-term exploration of the impact of the Internet on society. This work is part of the World Internet Project, which is organized and coordinated by the Center; included in the World Internet Project are the Center's work and partner studies in countries in North America, Europe, South America, and Asia. The first report of the World Internet Project was released in January 2004.

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

The Center for the Digital Future has become an internationally regarded policy studies center. The Center is committed to studying, through a variety of prisms, the important communication issues that transform our lives.

For more information about the Center, visit [www.digitalcenter.org](http://www.digitalcenter.org).

## Supplement 2

### The World Internet Project – International Contacts

**United States (Organizer)**

Center for the Digital Future  
USC Annenberg School for Communication  
[www.digitalcenter.org](http://www.digitalcenter.org)

**Argentina**

Institute of Applied Economics &  
Fundacion de Investigaciones  
Economicas Latinoamericanas  
[www.fiel.org.ar](http://www.fiel.org.ar)

**Australia**

Institute for Social Research  
Swinburne University of Technology  
[www.sisr.net](http://www.sisr.net)

**Bolivia**

Universidad NUR  
[www.nur.edu](http://www.nur.edu)

**Canada**

Canadian Internet Project  
[www.cipic.ca](http://www.cipic.ca)

**Chile**

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

**China**

Chinese Academy of Social Sciences  
[www.wipchina.org/index.php](http://www.wipchina.org/index.php)

**Czech Republic**

Masaryk University Brno  
[www.fss.muni.cz](http://www.fss.muni.cz)

**Germany**

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

**Great Britain**

Oxford Internet Institute  
[www.oii.ox.ac.uk](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 Journalism & New Media  
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**Iran**

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**Italy**

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

**Japan**

Toyo University  
<http://media.asaka.toyo.ac.jp/wip/index.html>

**Macau**

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

**Portugal**

ISCTE University  
[www.iscte.pt](http://www.iscte.pt)

**Singapore**

School of Communication Studies  
Nanyang Technological University  
[www.ntu.edu.sg/sci/sirc](http://www.ntu.edu.sg/sci/sirc)

**South Korea**

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

**Spain**

Servilab  
<http://www2.uah.es/servilab/>

**Sweden**

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

**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 Digital Future 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 Year Five of the Digital Future Project, interviews were conducted with 2,072 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, third, fourth, or fifth year were paid a monetary incentive.
- Interviews were conducted in English and Spanish. Interviewing took place between January and March 2005.

- 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 Year Five of the Digital Future Project was derived from two different sources, and this complicated the weighting procedure. The first portion of the sample consisted of respondents who had participated in the survey in the past. The second portion consisted of a new random sample that was recruited to replace dropouts.
- An examination of the profiles of each of these sample sources revealed differences from the most current U.S. Census results. Moreover, the differences varied depending on the sample source. As a result, the weighting for this year's survey consisted of two separate weighting adjustments, one for respondents that were repeats, the other for newly recruited respondents.
- Each of the different sub-samples was weighted to correct for their 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, and, race. In the final weighted blended sample, the largest deviation from current U.S. Census results occurred in the AGE category where the weighted total sample had 5.6 percent more 45-54 then the national average. All other deviations were less than 4.9 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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