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The 2008 Digital Future Report
Surveying The Digital Future
Year Seven



U S C A n n e n b e r g S c h o o l
C e n t e r f o r t h e
D i g i t a l F u t u r e

Individual Edition

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The 2008 Digital Future Report
Surveying The Digital Future
Year Seven

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The 2008 Digital Future Report

Surveying The Digital Future

Year Seven

Welcome to “Surveying the Digital Future,” the report of Year Seven 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, Asia, the Middle East, Australia, and New Zealand.

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

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

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

To achieve this objective, the Digital Future Project surveys more than 2,000 individuals in as many 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 for the Digital Future Project as cable modem, 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 other methods now unknown -- become available, the project will track them. The project is open to exploring the Internet in any form; for example, last year’s study includes findings for questions about online communities, and this year we have expanded that section with even more results about the social impact of online communities. We will also continue to 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 140). Through this team of international partners, the World Internet Project studies and compares changes associated with the Internet in different countries and regions, creating an international picture of change in online technology, use, and impact.

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

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

The Digital Future Project: Key Areas

The 2008 Digital Future Report includes findings that compare Internet users to non-users, new users (1.5 years or less online) to very experienced users (more than 10 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 2008 Digital Future Report includes a broad sampling of more than 100 major issues from this year's survey. We hope you will be enlightened by these findings from Year Seven 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 2008 Digital Future Project – Year Seven

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 six years of this study, conducted in 2001, 2002, 2003, 2005, 2006, and 2007, 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 (1.5 years or less of experience) compared to very experienced users (in Year Seven, more than 10 years of experience).

Here are highlights of the five major areas in the 2008 Digital Future Project:

Highlights: 2008 Digital Future Project – Year Seven

Note: “New users” have 1.5 years or less of experience on the Internet.
“Very experienced users” have more than 10 years of experience on the Internet.

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

How Many Hours Are Users Online

The number of hours online per week continues to increase – rising to an average of 15.3 hours per week, up by more than one hour per week from 2006, and the highest level in the Digital Future studies (Pages 24 and 30)

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

The 10 most popular online purchases are books, clothes, travel arrangements, gifts, CDs, videos, electronic goods, software/games, products for hobbies, and computers/peripherals. (Page 25)

Activities On The Internet: How Often?

How frequently do Internet users participate in the most popular online activities? In the current Digital Future Project, these percentages of Internet users were involved in these activities at least weekly:

- E-mail: 96 percent
- Instant messaging: 37 percent
- Looking for news online: 60 percent
- Searching for humorous content: 25 percent
- Internet surfing without a specific destination: 71 percent
- Playing online games: 35 percent
- Downloading music or listening to online music: 31 percent
- Finding product information: 43 percent
- Conducting online banking or other financial services: 38 percent.

In a new question for the Digital Future Project, 16 percent of Internet users said they go online to find or check a fact at least daily, while seven percent of users go online daily or more often to look up the definition of a word. (Pages 27-29)

What Is Your Home Page?

A growing number of Internet users select a search engine for their home page. Twenty-one percent of Internet users said that their home page is a search page such as Google -- more than double the response in 2005. Declining in the current study is the percentage of users who use an Internet portal -- such as Yahoo, America Online, or MSN -- as their home page. (Page 34)

What Is Your Destination After Your Home Page?

In a new question for the Digital Future Project, Internet users were asked where they go online after they log in and land on their home page. Almost half of users (47 percent) and the largest percentage by far said that their next destination is their e-mail account. (Page 35)

Internet Connection At Home: Telephone Modem Use Continues To Decline

For the seventh consecutive year, access to the Internet at home through a telephone modem continued to decline, and now represents less than one-quarter of all online access from home. More than three-quarters of home Internet access was through a broadband connection, an increase of 25 percent in one year. (Page 36)

Access To The Internet With Broadband And Modem: New Users Vs. Very Experienced Users

In spite of tremendous growth in broadband use, more than half of new users access the Internet through a telephone modem. (Page 37)

Broadband: Is It Always On At Home?

In a new question for the Digital Future Project, broadband users were asked if they kept their broadband connection on most of the time while they are at home. More than two-thirds of broadband users -- 68 percent -- agreed with this statement. (Page 38)

Working Computers: How Many At Home?

The number of American homes that have more than one working computer increased substantially over 2006 and 2005. In the current study, 43 percent of users said they have more than one working computer. (Page 39)

Internet Access By Cell Phone And Wireless Computer

The use of cell phones and computers equipped with wireless cards for Internet access continued to increase to their highest levels thus far in the Digital Future Project. (Page 41)

Internet Non-Users**Internet Non-Users: Reasons For Not Being Online?**

Americans who do not go online continue to offer several explanations for not using the Internet, and all of the four major reasons are increasing in prevalence. (Page 46)

“Internet Dropouts”: Exploring Why Users Stop Going Online

“Internet dropouts” -- those who have previously used the Internet but no longer go online -- continue to report a variety of reasons for not going online, but their responses shifted considerably. (Page 47)

Will Internet Dropouts Return To Internet Use?

The number of Internet dropouts who said they will go back online declined to the lowest level in the five years this question has been asked in the Digital Future Project. (Page 48)

Internet Non-Users: Views About Not Going Online

Respondents who do not use the Internet report a variety of disadvantages about not being online, such as being excluded from communications, feeling disadvantaged during job transitions, or having difficulty obtaining information for their jobs or personal interests. (Page 49)

Non-Users: Will They Go Online?

Of the respondents in the current study who are non-users, 46 percent said they are somewhat likely or very likely to go online next year – up from 40 percent in 2006. The percentage of respondents who said they are not likely at all to use the Internet in the next year dropped to 54 percent of non-users -- near the lowest level in the seven years of the Digital Future Project. (Page 50)

Media Use And Trust**Television And The Internet: Importance As Sources Of Information And Entertainment**

After seven years of studying online behavior and attitudes, the Digital Future Report found that the Internet is perceived by users to be a more important source of information for them -- this over all other principal media, including television, radio, newspapers, and books. (Page 52)

Information Online: Is It Reliable?

In the current Digital Future Project, 46 percent of Internet users said that most or all of the information online is generally reliable -- this compared to 43 percent of non-users who gave the same response. (Page 55)

Online Information: Reliability And Accuracy Of Frequently-Visited Web Sites

Steadily increasing percentages of Internet users find high degrees of reliability and accuracy on their favorite Web sites. Eighty-three percent of users said that most or all of the information on Web sites they visit regularly is reliable and accurate -- the same percentage as in 2006 and slightly higher than 81 percent in 2005. (Page 56)

Web Sites: Which Are Reliable And Which Are Not?

The percentage of Internet users who said that most of the information posted by established media and government Web sites is reliable and accurate remains consistent with the three previous studies in which these questions were asked. (Page 58)

Media Web Pages: Reliability And Accuracy

Internet users continue to report high levels of reliability and accuracy for Web pages posted by established media, such as The New York Times and CNN. Among all users, 80 percent said that most or all of the information posted on media Web sites is reliable and accurate -- up from 77 percent in 2006. (Page 60)

Search Engines: Reliability And Accuracy

A higher percentage of Internet users reported negative views about the reliability and accuracy of information provided by search engines, such as Google. Slightly over half of Internet users -- 51 percent -- said that most or all of the information produced by search engines is reliable and accurate -- down from the 62 percent who reported the same response in 2006. (Page 62)

Time-Shifting Of TV Viewing

A large minority of respondents are time-shifting their TV viewing. In a new question for the Digital Future Project, 29 percent of respondents agreed with the statement, "I often watch television shows that have been recorded with a VCR or a digital video recorder such as Tivo." (Page 64)

Media Online: New Users And Very Experienced Users

New users and very experienced users report wide differences in use of a variety of online media. New users spend considerably more time online playing computer games -- an average of 1.2 hours per week more than very experienced users. Very experienced users spend more time than new users reading online newspapers, books, and magazines, and listening to online radio. (Page 68)

Would You Miss The Print Edition Of Your Newspaper?

In a new question, respondents who read print editions of newspapers were asked if they would miss the offline edition if it was no longer available. While more than half of respondents (52 percent) expressed some level of agreement with this question, 27 percent disagreed. (Page 69)

Does Online Content Lead To Cancelled Print Subscriptions?

Twenty-one percent of Internet users agreed that they have stopped a subscription for a newspaper or magazine because they now get the same or related content online. (Page 70)

Surfing The Web

In the current Digital Future Project, more than three-quarters of Internet users (78 percent) sometimes or often go online without a specific destination in mind, up from 74 percent in 2006. Only 22 percent of users never go online without a specific destination. (Pages 71 and 72)

Cell Phones And Multiple Uses

A large percentage of cell phone users report a range of uses for their phones in addition to talking, such as taking pictures, texting, and playing games. However, less than 10 percent of cell phone users (eight percent) access the Internet with their phones. (Page 73)

Posting Information Online

Distributing original content created by Internet users -- whether through a blog, display of photos, or maintaining a personal Web page -- continued to increase. In the current Digital Future Project, 41 percent of Internet users said they post photos online -- an almost fourfold increase in only four years. Smaller but steadily growing percentages of users said they maintain their own Web site or keep a personal blog. (Page 74)

Consumer Behavior**Who Is Buying Online?**

The number of online purchasers has increased to the highest level in the history of the Digital Future Project, increasing 16 percent since 2006. (Page 76)

Purchasing On The Internet: Spending Per Month

Sixty percent of Internet users age 18 and older bought online and spent under \$100 a month, a large increase over 2006. (Page 76)

How Often Do Online Purchasers Buy Online?

The average number of annual online purchases for those age 18 and above increased to its peak thus far in the Digital Future Project -- now more than 36 purchases per year. (Page 77)

How Does Buying Online Affect Traditional Retail Purchasing?

A large percentage of online purchasers reported that their Web purchases have reduced their buying of similar items in retail stores. After a small decline in 2006, the percentage who said that Web purchasing reduced their local retail purchasing somewhat or a lot grew to 67 percent of online purchasers, up from 65 percent in 2006. (Page 78)

Browsing For Products: Retail Stores Vs. The Internet

Large percentages of respondents report using both the Internet and retail stores for browsing and purchasing. Seventy-one percent of Internet purchasers said they sometimes or often browse in traditional retail locations and then buy online. Even higher percentages of respondents said they use the Internet as a merchandise browsing tool before buying in stores. (Page 79)

Privacy: Concerns When Buying Online

Privacy and security online have been found to be major concerns in each of the seven Digital Future studies. Almost all respondents have reported concerns about the privacy of their personal information when or if they buy on the Internet. The percentage of all respondents who reported the highest level of concern increased in 2007, and overall concern was the highest since the first year of the Digital Future Project. (Page 80)

Privacy: Comparing Concerns Among Non-Purchasers Vs. Purchasers

Although the percentage of all users who report the highest level of concern continues to be quite large, comparing Internet purchasers to non-purchasers shows that online buyers report much lower levels of concern. (Page 81)

Credit Card Information: Are Concerns Stabilizing?

Concerns about credit card security when or if buying online continue to remain high among respondents in the Digital Future Project. Although the percentage of those with the highest level of concern about credit card information increased slightly to 57 percent, the overall levels of concern have stabilized over the four most current years of the study -- and at a much lower level than when this issue was first tracked in 2001. (Page 83)

Communication Patterns**How Many Americans Are Using E-mail?**

The already high level of e-mail use by Internet users grew even higher. In the current digital future project, 99 percent of Internet users said they use e-mail. (Page 88)

E-mail Users: By Age

Given the near-total use of e-mail by Internet users, nearly all users in all age ranges use e-mail. The only modest gaps are among those under 17, and those ages 45-54. (Page 88)

How Quickly Should Users Reply To E-mail?

Increasing numbers of e-mail users expect rapid response to e-mail. Thirty-one percent said that personal e-mail messages should be answered as soon as possible -- up from 24 percent in 2006. (Page 89)

E-mail Communication With Teachers, Government Officials, And Health Care Professionals

Growing percentages of e-mail users reported that they use e-mail to contact a teacher or government official; more than half of e-mail users contacted either a teacher or government official. (Page 90)

Instant Messaging And Social Relationships

Even as use of instant messaging increases, less than one-quarter of Internet users overall said that instant messaging is important in maintaining social relationships. (Page 93)

The Internet And Social Relationships

In a new question for the Digital Future Project, users were asked about the importance of the Internet in helping to maintain social relationships. Overall, 45 percent of users said that the Internet was important or very important in helping them to maintain social relationships, while 30 percent of users said the Internet is not important in maintaining their social relationships. (Page 95)

The Internet And Online Friends

Internet users report growing numbers of online friends. Internet users said they have an average of 5.2 friends online whom they have never met in person, the highest number reported thus far in the Digital Future Project. (Page 96)

Total Time Spent Socializing With Friends And Family

Internet users report slightly more time per week than non-users socializing with friends in person. Users also report spending three more hours per week than non-users socializing face-to-face with family. (Page 97)

Children And Time Spent With Friends

Large percentages of adults (87 percent) said that the children in their household spend the same amount of time or more time with friends since using the Internet. However, the percentage of adults who said that their children spend less time with friends increased for the third year in a row, to the highest level in the seven years of the Digital Future Project. (Page 97)

Online Predators: Are They A Threat To Children?

A new question for the Digital Future Project found that a large majority of adults said that online predators are a threat to the children in their households. In households with children, 53 percent of adults agreed that online predators are a threat to their children. (Page 99)

Social Effects

Online Communities

For the Digital Future Project, an “online community” is defined as a group that shares thoughts or ideas, or works on common projects, through electronic communication only. These online communities represent broad interests -- professional, social, spiritual, hobby, and political, among others.

Are You A Member Of An Online Community?

Fifteen percent of Internet users reported they are members of an online community -- more than double the percentage since this question was first asked three years ago. *(This percentage does not include participants in social networking sites, such as Facebook and MySpace.)* (Page 101)

Types of Online Communities

Nearly half of online community members said their community is related to their hobbies, while large percentages report that their community involves their social lives or professional issues. (Page 103)

Participation In Online Communities: Does It Affect Involvement In Real-World Communities?

A large percentage of online community members said that their participation in those communities has no effect on their involvement in offline communities. However, 16 percent of online community members said that this involvement decreased their involvement in offline communities. (Page 106)

Online Community Members: Interaction

Seventy-one percent of online community members said they sometimes or always interact with other members of their community while logged in, up marginally from 70 percent in 2006. (Page 106)

Online Communities: Links To Offline Actions

A large increase in the percentage of online community members take actions offline at least once a year that are related to their online community, such as attending a meeting. (Page 107)

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

In addition to high levels of interaction with specific members of online communities, a growing majority of online community members meet their counterparts in person. (Page 110)

Web Sites For Video Sharing Or Social Networking: How Often Do You Visit?

While one-fourth of online community members never visit video sharing or social networking sites such as YouTube or Facebook, half of them visit once a week or more, and 22 percent visit at least once a day. (Page 111)

Why Do Online Community Members Visit Web Sites For Video Sharing And Social Networking?

Online community members reported a wide range of reasons for visiting video sharing services such as YouTube and social networking Web sites such as MySpace, with relaxing or filling time at the top of the list. Users also report reasons involving personal values, such as gaining insight into themselves or other members, looking for a sense of belonging, or finding models of behavior. (Page 112)

Posting Content Online By Online Community Members

Among all online community Web site visitors, almost two-thirds (64 percent) said that they never create videos or other content to post on Web sites such as YouTube, MySpace, Facebook, and Hi5. (Page 113)

Children Participating In Online Communities: The Adult View

Although participation in online communities Web sites for video posting and social networking is increasing, a large percentage of adults are uncomfortable with the children in their households participating in online communities. In a new question for the Digital Future Project, adults with children in their household were asked if they were comfortable with the children participating in online communities; 63 percent disagreed, while only 15 percent agreed. (Page 114)

Participation In Online Communities Related To Social Causes

Three-quarters of online community members in the current Digital Future Project said they use the Internet to participate in communities related to social causes -- up 30 percent from 2006. (Page 115)

The Internet: An Aid For Users To Stay Informed About Social Causes?

Almost all members of online communities (94 percent) said the Internet helps them become more informed about social causes. (Page 116)

Are You Participating In New Social Causes Because Of Online Communities?

Large and growing percentages of online community members (87 percent) are participating in social causes that are new to them since their involvement in online communities began. (Page 117)

Social Activism And Participation In Online Communities

Although many online community members are actively involved in social causes, a lower percentage said that their activism has increased since they began participating in online communities compared to 2006. (Page 118)

Has Offline Participation In Social Issues Changed Because Of Online Involvement?

Although large percentages of Internet users said they participate in online social causes, only 16 percent said that they are involved more often in offline social issues as a result of their online participation. (Page 119)

Online Communities: Participation In Non-Profit Organizations

A growing percentage of online community members report that their participation in non-profit organizations has stayed the same since they started using the Internet. Twenty-one percent of online community members said their involvement in non-profit organizations has increased -- down from 30 percent in 2006. (Page 119)

Are Online Communities As Important As The Real World?

For the second year in a row, a large percentage of members of online communities feel as strongly about their online communities as they do about their real-world communities. Fifty-five percent of online community members said they feel as strongly about their online communities as they feel about their real-world communities -- an increase from 43 percent in 2006. (Page 120)

Children And The Internet**Internet Use: The Right Amount Of Time For Children?**

The small but growing percentage of adults who said that the children in their households spend too much time using the Internet reached 25 percent of respondents -- the highest number in the seven years of the Digital Future Project. (Page 122)

Television Viewing: The Right Amount Of Time For Children?

In all seven studies in the Digital Future Project, more than 40 percent of adults said that the children in their households spend too much time watching television. That percentage has reached the highest level in the study (49 percent) for the second year in a row. (Page 123)

The Internet And Schoolwork: Children's Views

Children and adults in the current Digital Future Project continue to express conflicting views about the importance of the Internet for schoolwork. Almost all Internet users age 18 and under said that going online plays a major role in their schoolwork, but the level of importance has declined slightly. (Page 124)

Internet Use And School Grades: The Adults' View

As in the previous years of the Digital Future Project, adults take a different view than children of the Internet's value for schoolwork. Most adults said that the Internet has no effect on school grades for the children in their household, and the adult view of the Internet as a negative influence on grades is growing. (Page 125)

Internet Use And Television Viewing: Use As Punishment Tools

Denying access to both the Internet and television as a punishment tool for children continued to increase, and reached their highest levels to date. (Page 126)

Political Power And Influence**Is The Internet Important In Political Campaigns?**

Sixty-four percent of Internet users agreed that the Internet has become important for political campaigns -- up from 59 percent of users in 2006. (Page 128)

Is the Internet A Tool For Political Influence?

Can the Internet encourage public officials to care more about what people think? Only a small percentage of respondents said yes, and the number is declining. (Page 129)

The Internet: Does It Help People Better Understand Politics?

In the current Digital Future Project, belief that the Internet can be a tool for learning about the political process continues to remain high, but has declined slightly for the second consecutive year. (Page 130)

Voting Online: A Split Decision

In a new question for the Digital Future Project, respondents were asked about their interest in voting online. Among respondents 16 and older, 41 percent disagreed or strongly disagreed with this statement, while 37 percent agreed or strongly agreed. (Page 134)

Trends And Issues

The Digital Future Project identified several major trends and issues about the maturing of the Internet, including: increasing negative views about the Internet, the views of non-users, changes in media use, online communities, and the impact of the Internet on the political process. (Page 135)

* * * * *

THE 2008 DIGITAL FUTURE REPORT
Surveying the Digital Future
YEAR SEVEN

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 135.

Internet Users And Non-Users

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

How did the experiences of users and non-users differ in Year Seven of the Digital Future Project?

Do the views of online users change as they progress from being “new users” (1.5 years or less using the Internet) to “very experienced users” (more than 10 years on the Internet)?

* * * * *

The 2008 Digital Future Project found:

- **The number of hours online per week continues to increase** – rising to an average of 15.3 hours per week – an increase of more than an hour since 2006.
- **The number of hours online from home also continues to increase** – rising to an average of 10 hours per week.
- **More than 30 percent of Internet users have been going online for at least 10 years.**
- **Seventy-six percent of Internet users go online at home through a broadband connection** -- defined as cable modem, DSL, ISDN or T1/T3.

Internet Access And Use

Year Seven of the Digital Future Project found continued growth in the number of hours online overall and from home.

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

Internet Access

Hours Online

■ Average numbers of hours online per week	9.4	9.8	11.1	12.5	13.3	14.0	15.3
■ Average number of hours online at home per week	3.3	5.9	6.8	6.9	7.8	8.9	10.0
■ Hours online per week from home, Year Seven (new users)*							6.7
■ Hours online per week from home, Year Seven (very experienced users)**							12.3

* “new users” = 1.5 years or less using the Internet

** “very experienced users” = more than 10 years on the Internet

Number Of Years Online – Year Seven

1.5 years or less	1.8%
More than 1.5 years to four years	8.8%
More than four years to seven years	18.7%
More than seven years to 10 years	40.0%
More than 10 years	30.7%

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

Online Purchasers

■ Online purchasers (% of Internet users)	n/a	48.9	38.2	39.4	42.8	49.2	61.7
■ Average number of annual purchases (online purchasers)	n/a	11.0	29.0	29.6	34.6	30.0	35.5

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

■ Books	65.6%
■ Clothes	57.4%
■ Travel Arrangements	57.3%
■ Gifts	50.6%
■ CDs	44.9%
■ Videos/DVDs	41.3%
■ Electronic Goods/Appliances	40.9%
■ Software/Games	40.9%
■ Products for Hobbies	36.8%
■ Computers/Peripherals	35.7%

America On The Internet

Internet users: average years online 9.3

Internet connection

by telephone modem 24%

with broadband 76%

Homes with two or more working computers 43%

Internet users who keep a blog

2003 3%

2007 13%

Does new communications technology make the world a better place?

(Internet users who say yes)

2000 66%

2007 57%

Internet users who select a Web portal as their home page

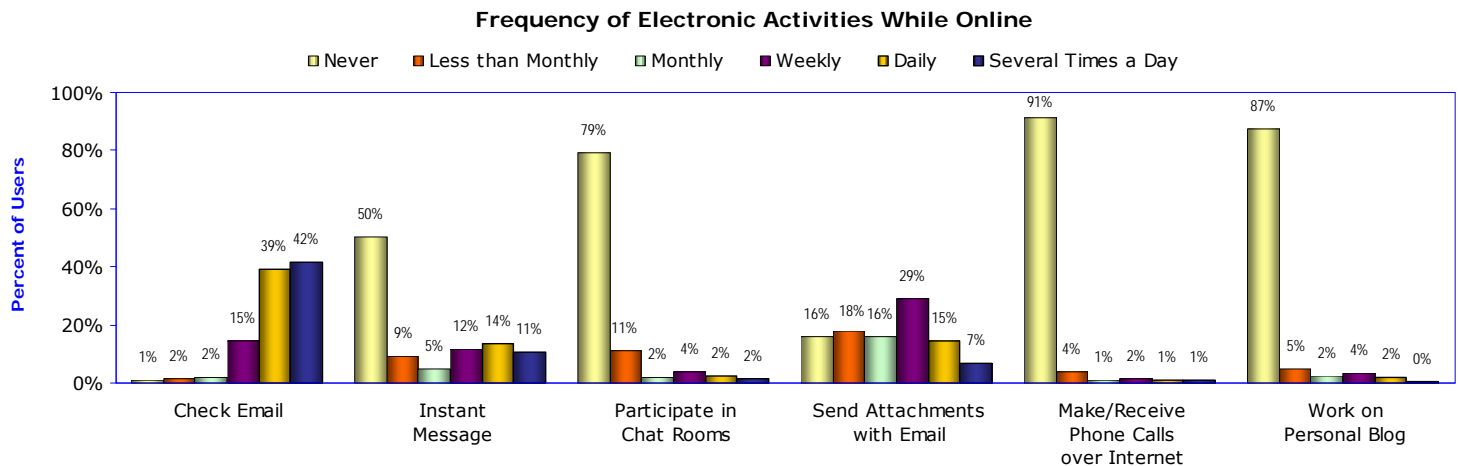
2005 54%

2007 41%

Activities On The Internet: How Often Online?

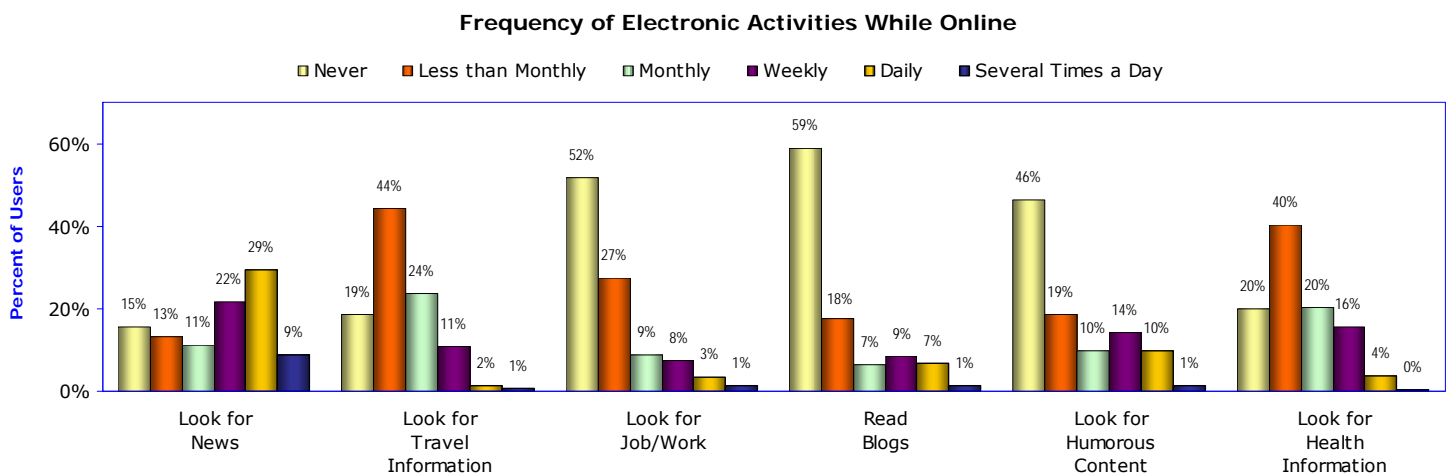
How frequently do Internet users participate in the most popular online activities?

In the current Digital Future Project, 96 percent of Internet users reported that they checked e-mail at least weekly (defined as weekly, daily, or several times a day). Fifty-one percent sent attachments with their e-mail at least weekly, and 37 percent used instant messaging at least weekly.



(Q708A M-1)

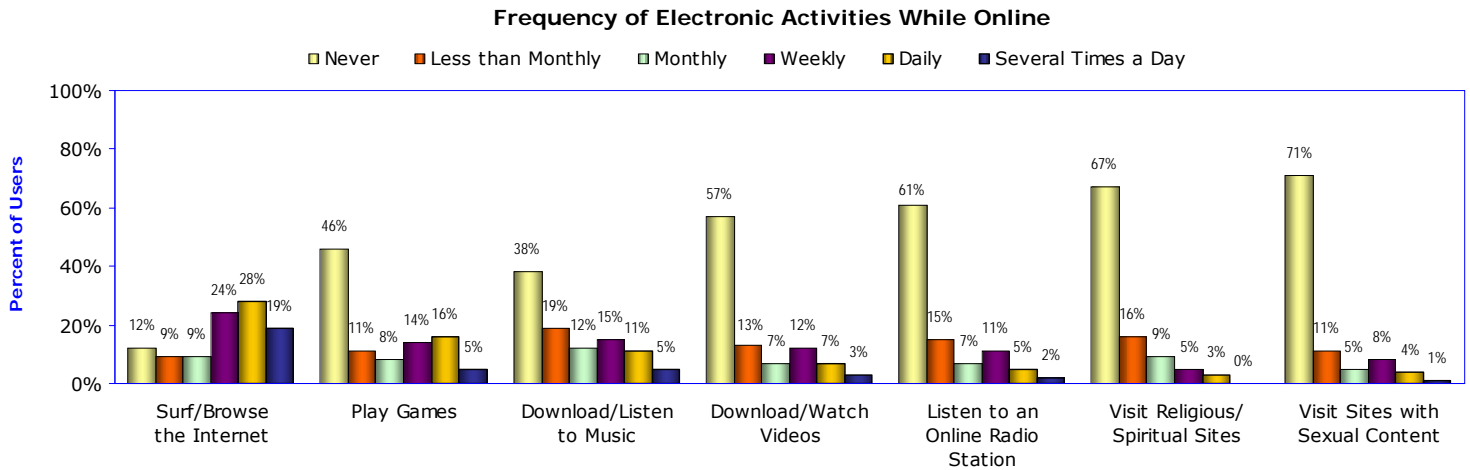
Sixty percent of Internet users looked for news online at least weekly, while 25 percent looked for jokes, cartoons, or other humorous content with the same frequency.



(Q708B M-1)

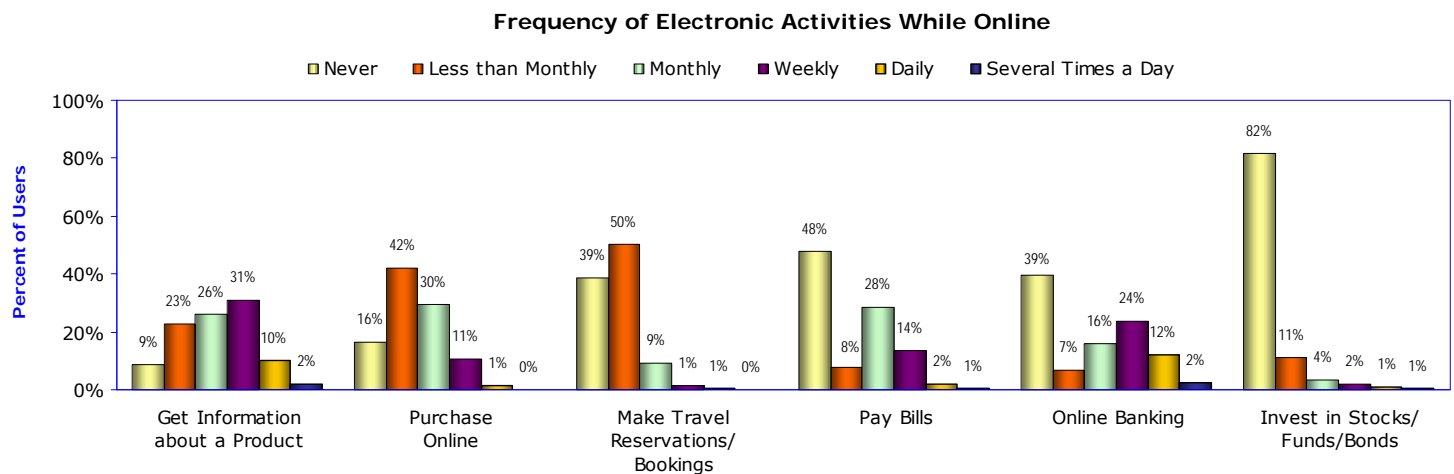
Activities On The Internet: How Often Online? (Continued)

Seventy-one percent of Internet users browsed the Internet without a specific destination at least weekly; 35 percent played games online, and 31 percent downloaded or listened to music with that frequency.



(Q708C M-1)

Forty-three percent of Internet users go online at least weekly to get product information, while 38 percent use online banking or other financial services with that frequency.

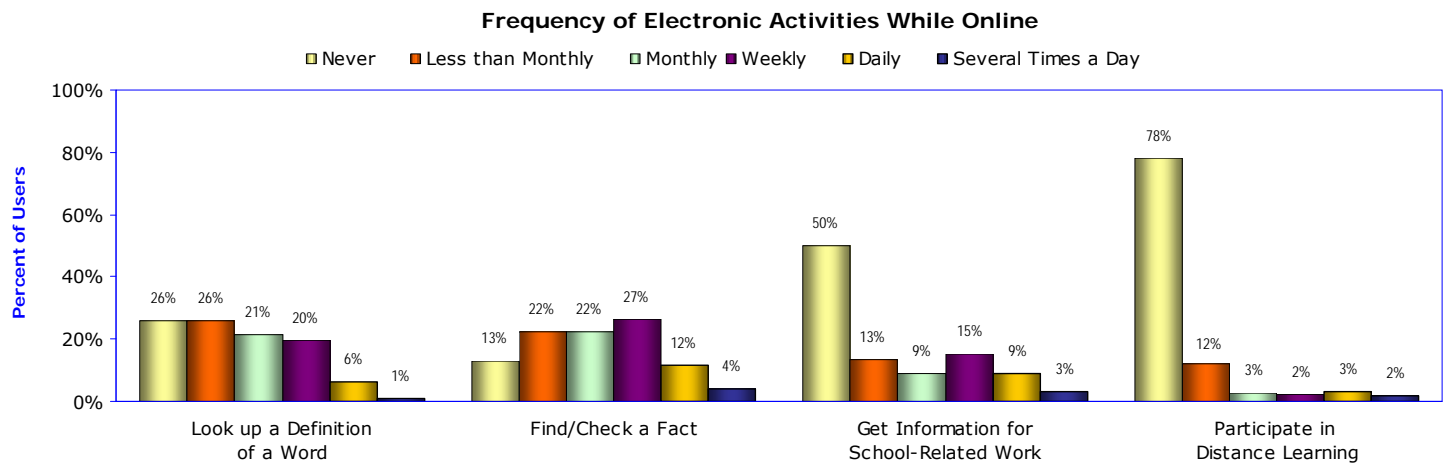


(Q708D M-1)

Activities On The Internet: How Often Online? (Continued)

Many Internet users frequently go online to seek information or use Web-based reference resources, often on a daily basis or several times each day.

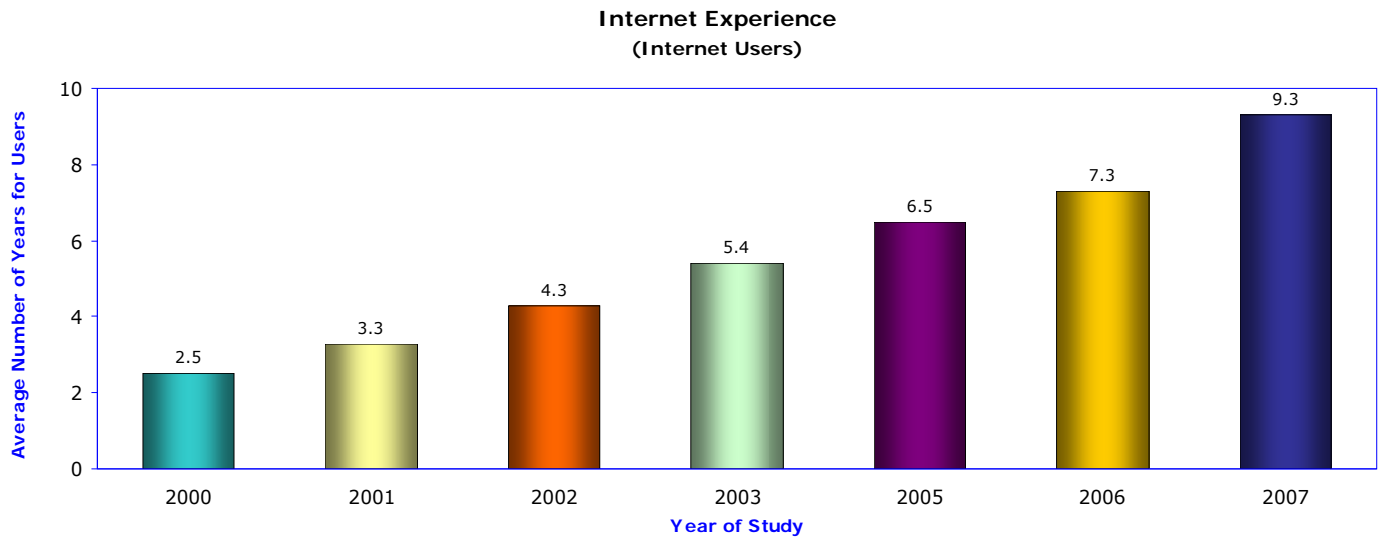
In a new question for the Digital Future Project, 16 percent of Internet users said they go online to find or check a fact at least daily, while seven percent of users go online daily or more often to look up the definition of a word.



(Q708E M-1)

How Many Years Have Internet Users Been Online?

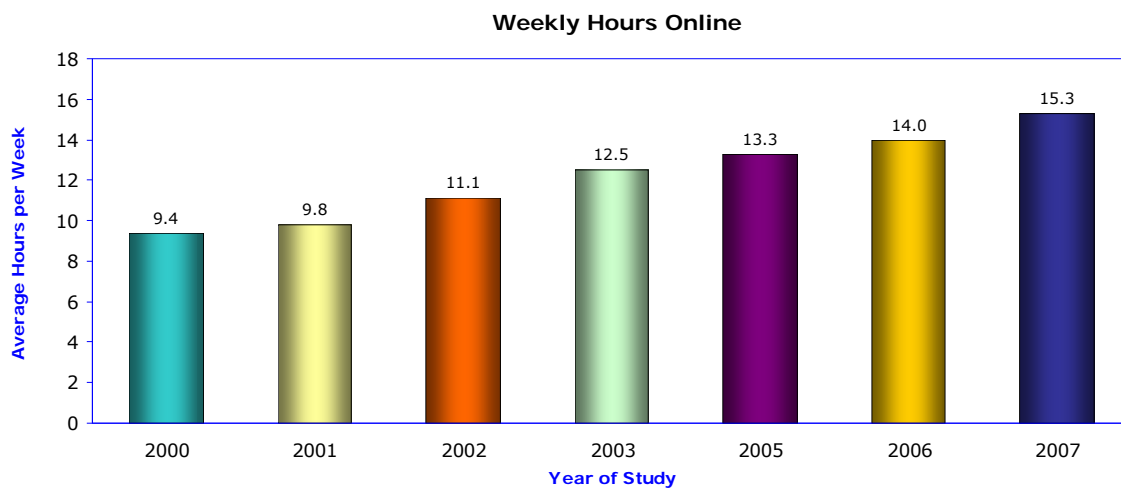
The average number of years that Internet users have been going online has increased in each year of the Digital Future Project. In the current study, Internet users reported an average of 9.3 years of experience online.



(Q210 M-2)

How Many Hours Are Users Online?

The average number of hours online per week continues to grow. This year, users report an average of 15.3 hours online per week, up from 14 hours in 2006.

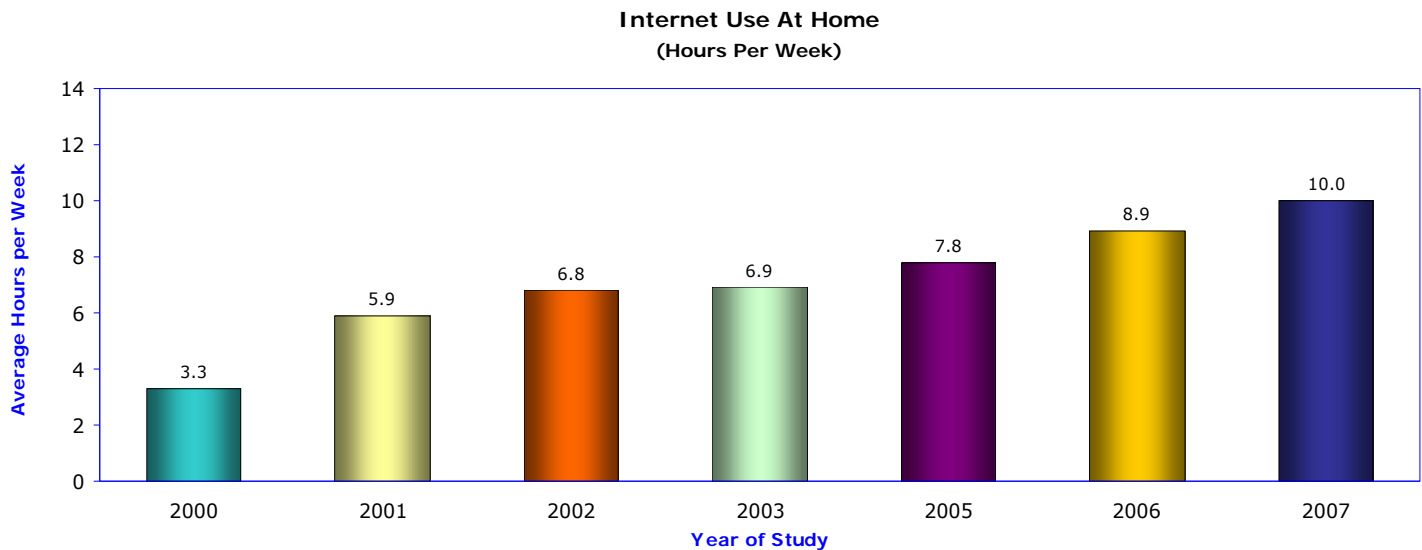


(Q350)

Using The Internet At Home: Hours Per Week

Internet use at home has increased steadily in the seven Digital Future studies.

The average hours of Internet use at home has increased by almost an hour a week for four consecutive years, and has reached 10 hours per week -- the highest level in the Digital Future studies.

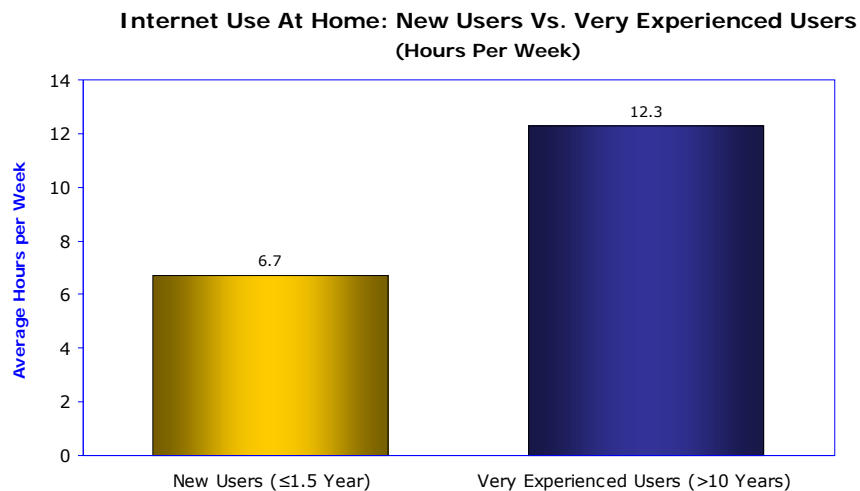


(Q350 M-1)

Using The Internet At Home: Hours Per Week By New Users and Very Experienced Users

Very experienced users reported much higher levels of Internet use at home compared to new users.

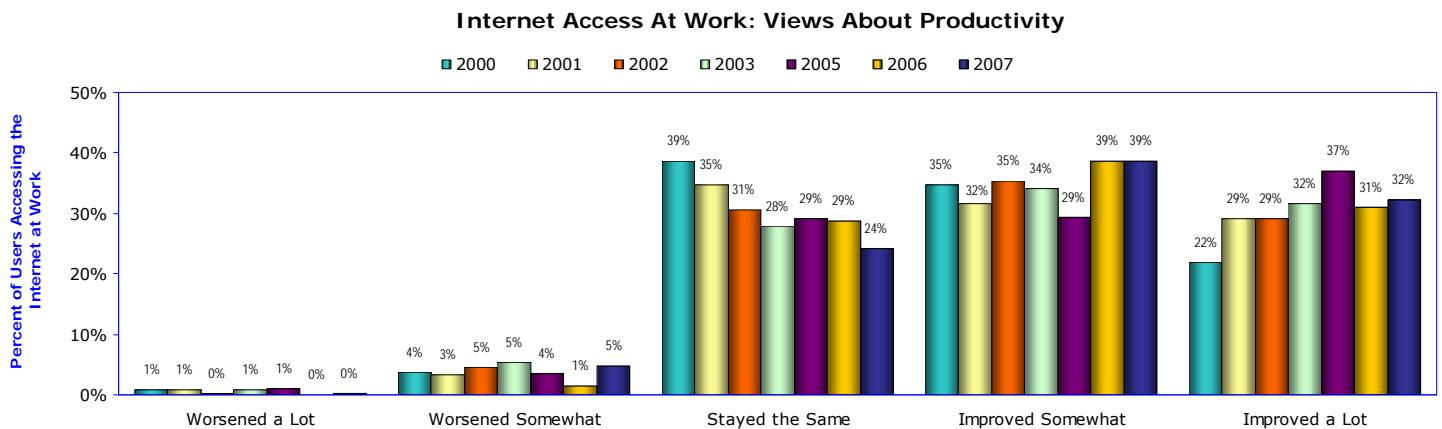
Very experienced users reported an average of 12.3 hours of Internet use at home per week, up from 10.3 hours in 2006.



(Q350 M-2)

The Internet At Work: Are Workers More Productive Because Of The Internet?

The percentage of users who said the Internet at work makes them more productive remains high in the current Digital Future Project. Seventy-one percent of users who have access to the Internet at work said that by going online at work their productivity has improved, up marginally from 70 percent in 2006.



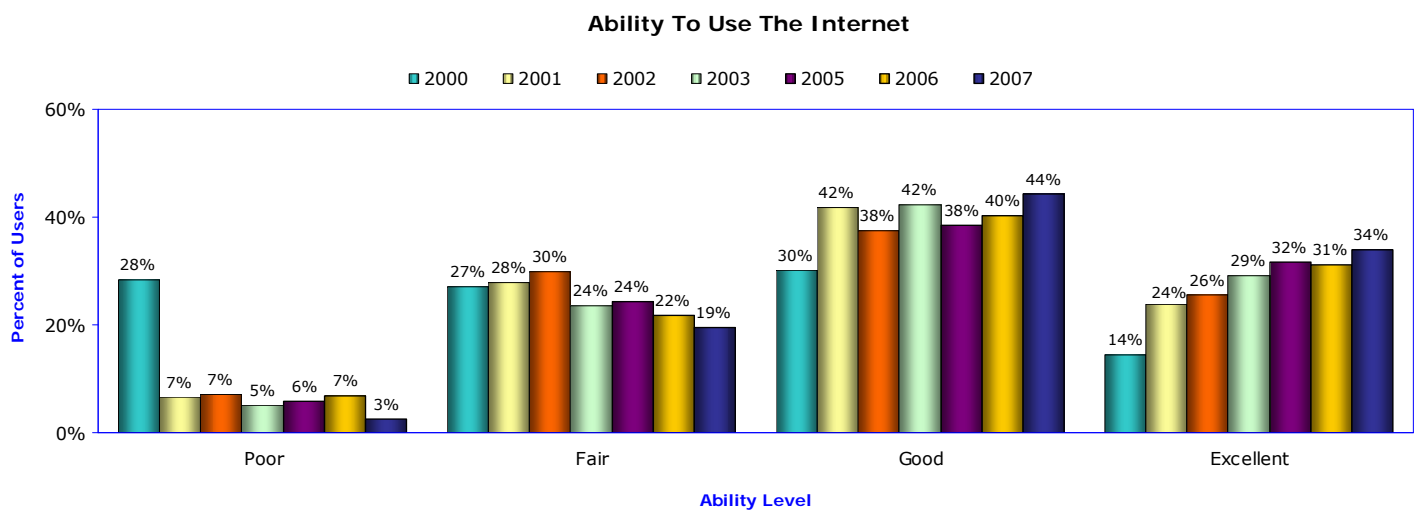
(Q491 M-2)

Rating Ability To Use The Internet: Confidence Continues To Improve

Internet users continue to report growing levels of confidence in their online skills.

Seventy-eight percent of users rate their ability to use the Internet as good or excellent -- up from 71 percent in 2006.

In contrast, in 2000 only 44 percent of users rated their ability to use the Internet as good or excellent.



(Q640 JC-2)

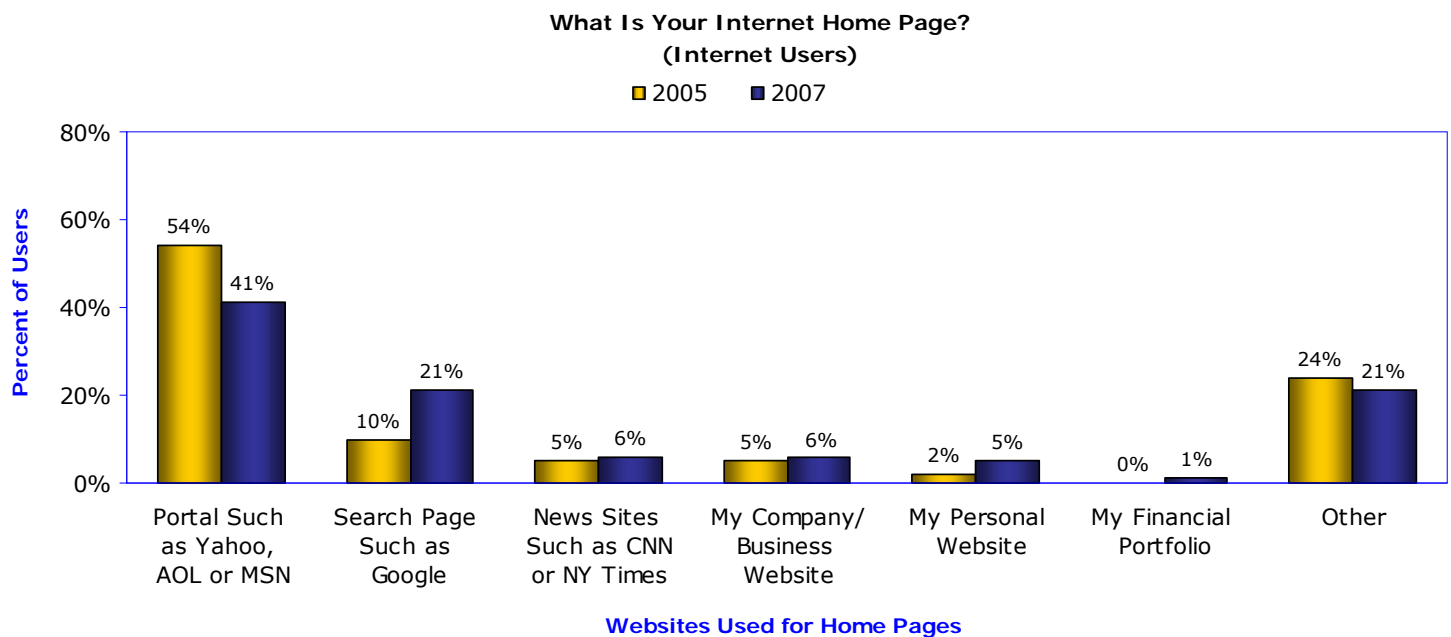
What Is Your Home Page?

A growing number of Internet users select a search engine for their home page.

Twenty-one percent of Internet users said that their home page is a search page such as Google -- more than double the response in 2005 (the last time this question was asked in the Digital Future Project).

Declining in the current study is the percentage of users who use an Internet portal -- such as Yahoo, America Online, or MSN -- as their home page.

Of note is the increase in the number of users who now use their personal Web site as their home page -- five percent in the current study.

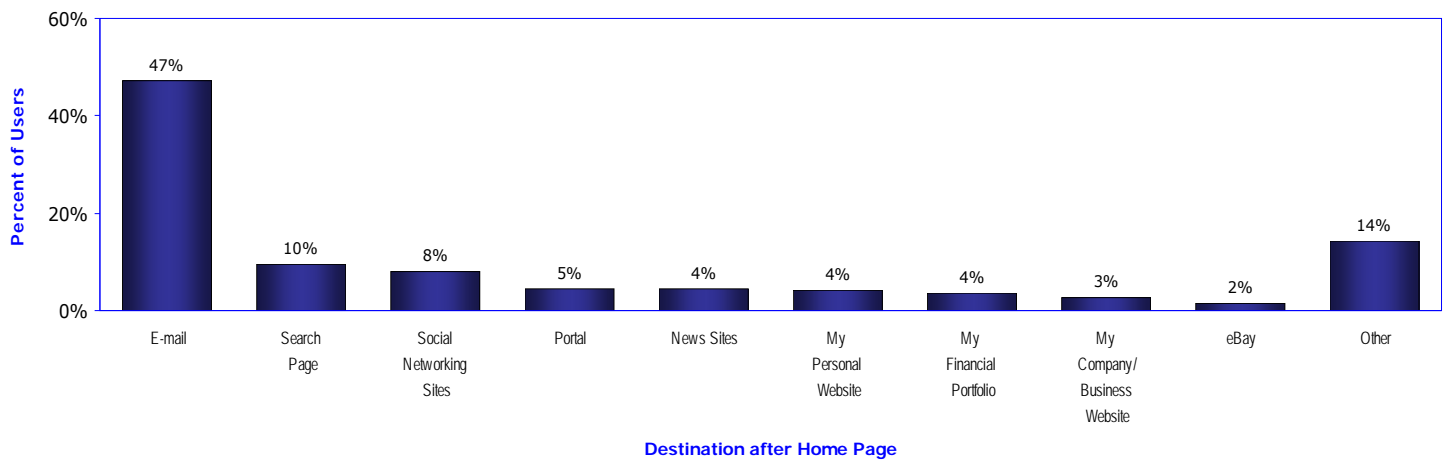


(Q294 M-2)

What Is Your Destination After Your Home Page?

In a new question for the Digital Future Project, Internet users were asked where they go online after they log in and land on their home page. Almost half of users (47 percent) and the largest percentage by far said that their next destination is their e-mail account. For the second-most frequent response, ten percent of users said that a search page was their next destination.

What Is Your Next Destination After Your Home Page?



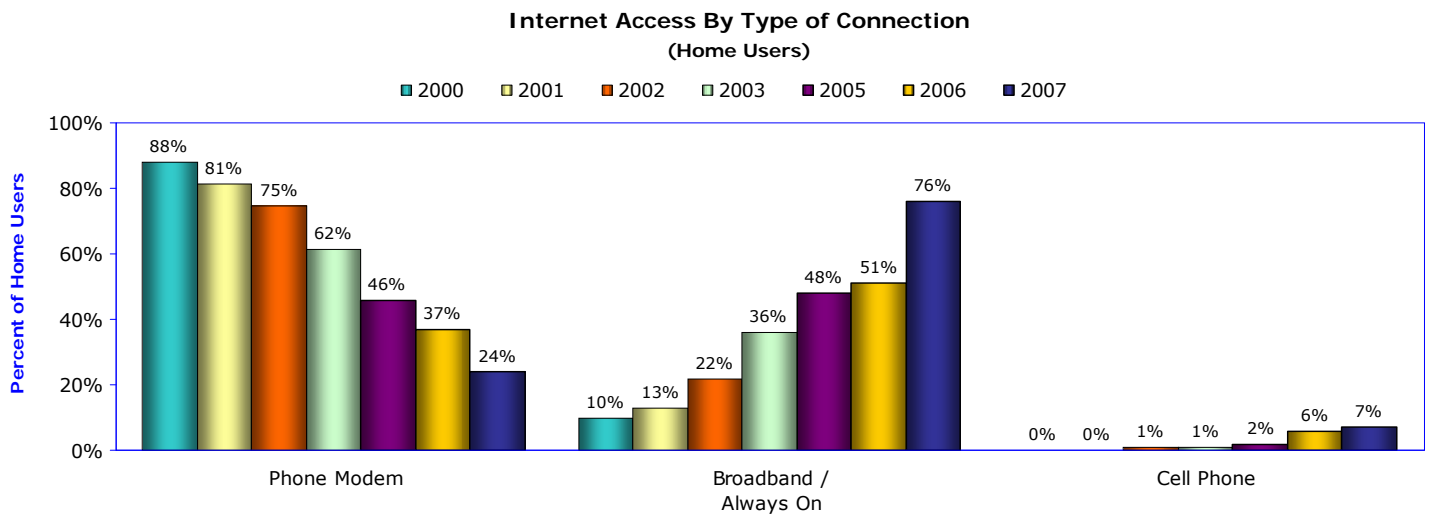
(Q294 B M-1)

Internet Connection At Home: Telephone Modem Use Continues To Decline

For the seventh consecutive year, access to the Internet at home through a telephone modem continued to decline, and now represents less than one-quarter of all online access from home.

More than three-quarters of home Internet access was through a broadband connection, an increase of 25 percent in one year.

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

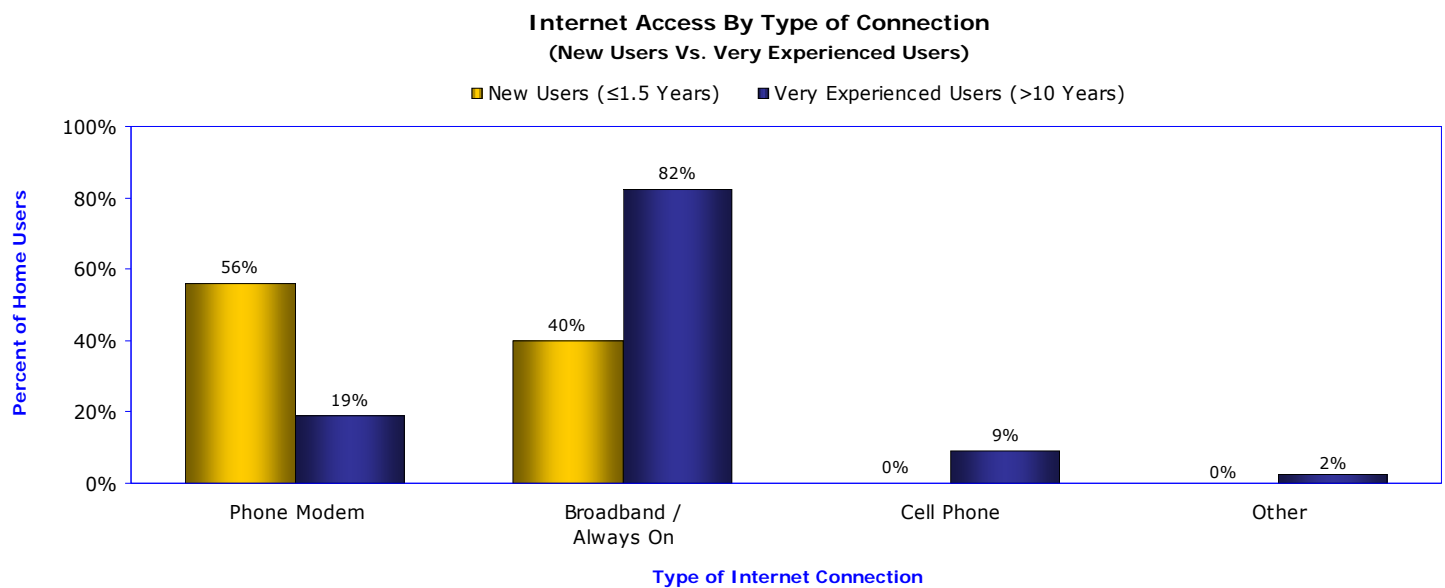


(Q360 M-3 multiple responses possible)

Access To The Internet With Broadband And Modem: New Users Vs. Very Experienced Users

In spite of tremendous growth in broadband use, more than half of new users now access the Internet through a telephone modem (56 percent).

A large majority of very experienced users -- 82 percent -- use a broadband connection to go online, up from 64 percent in 2006.



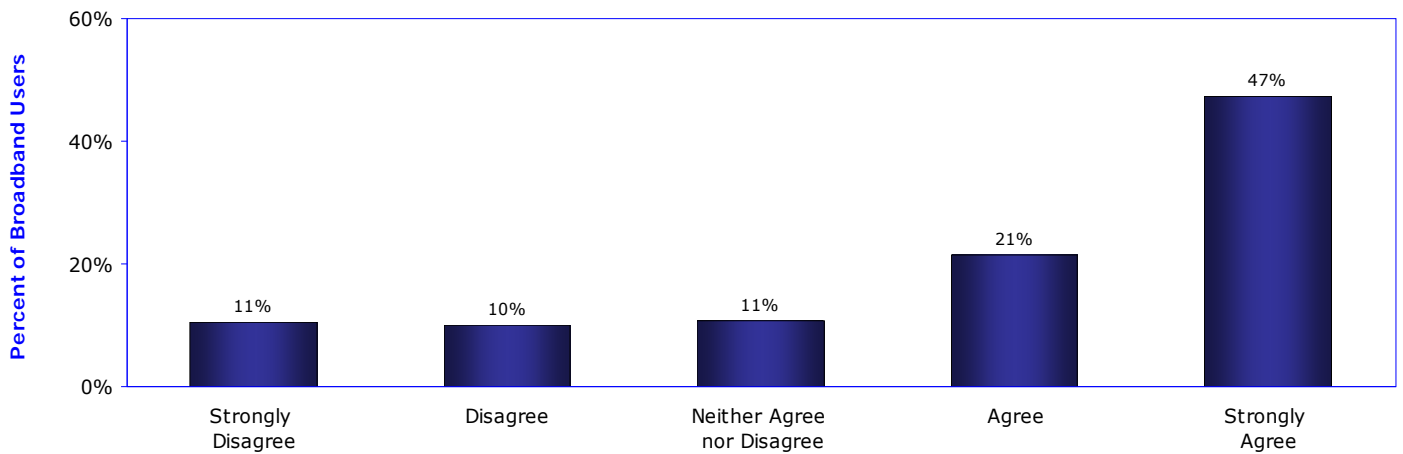
(Q360 M-2) (Top categories only; multiple responses possible)

Broadband: Is It Always On At Home?

For most broadband users, the Internet is an “always on” device.

In a new question for the Digital Future Project, broadband users were asked if they kept their broadband connection on most of the time while they are at home. More than two-thirds of broadband users -- 68 percent -- agreed with this statement, compared with 21 percent who disagreed.

I Keep My Broadband Connection Turned On Most Of The Time When I Am At Home



(Q533 M-2)

Working Computers: How Many At Home?

The number of American homes that have more than one working computer increased substantially over 2006 and 2005.

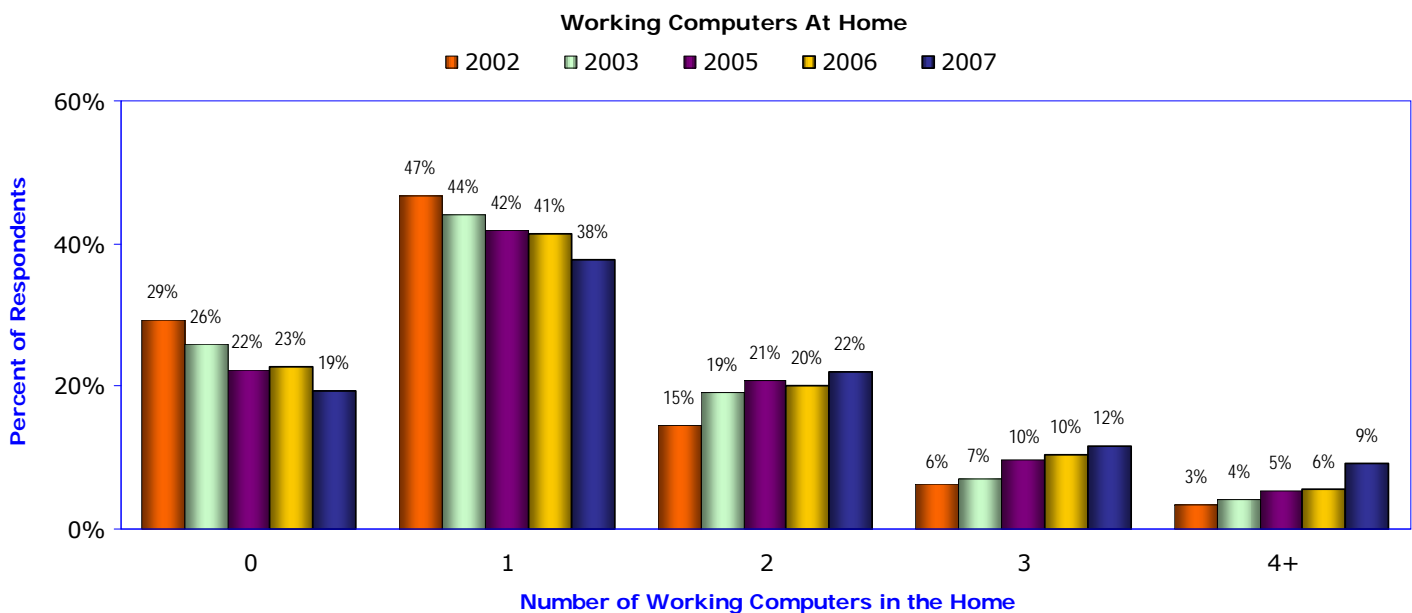
In the current study, 43 percent of users said they have more than one working computer -- up from the 36 percent reported in both 2006 and 2005.

Twenty-one percent of respondents said their household has three or more computers

Only four years ago, in 2002, when this question was asked for the first time in the study, only nine percent of households had three or more working computers.

The number of households without a working computer has dropped slightly, to 19 percent, compared to 23 percent in 2006 and 22 percent in 2005.

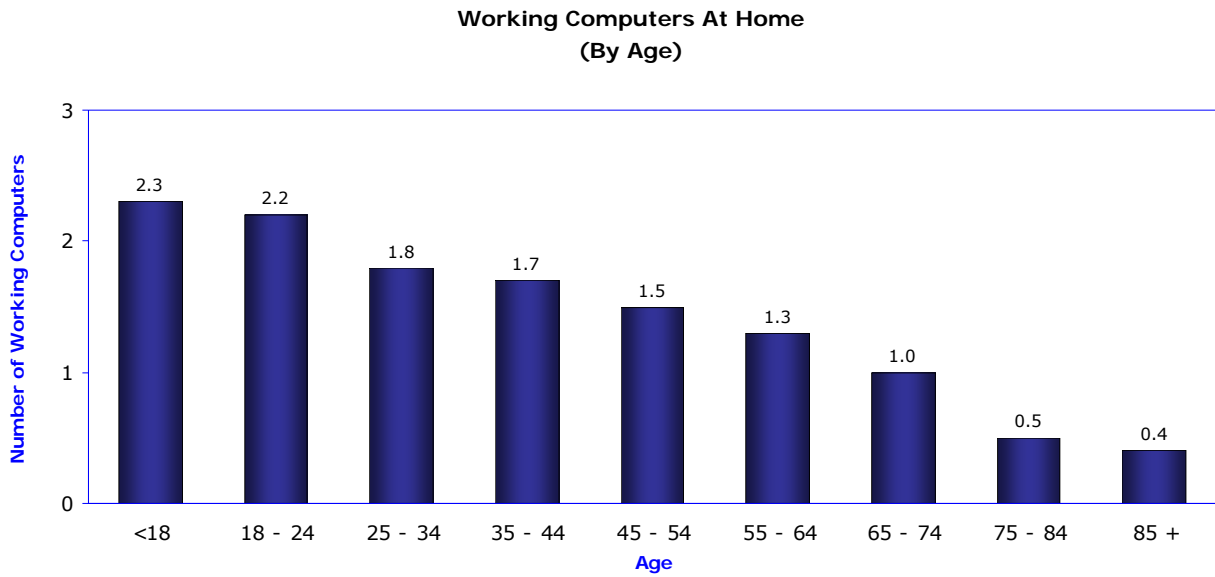
(Note: The responses to this question and the one that follows do not include PDAs, video games, Web TV, cell phones, or other electronic devices).



(Q130 JC-2)

Working Computers At Home: By Age

The younger the respondent in a household, the greater the number of computers. Respondents under 18 reported the largest number of working computers.

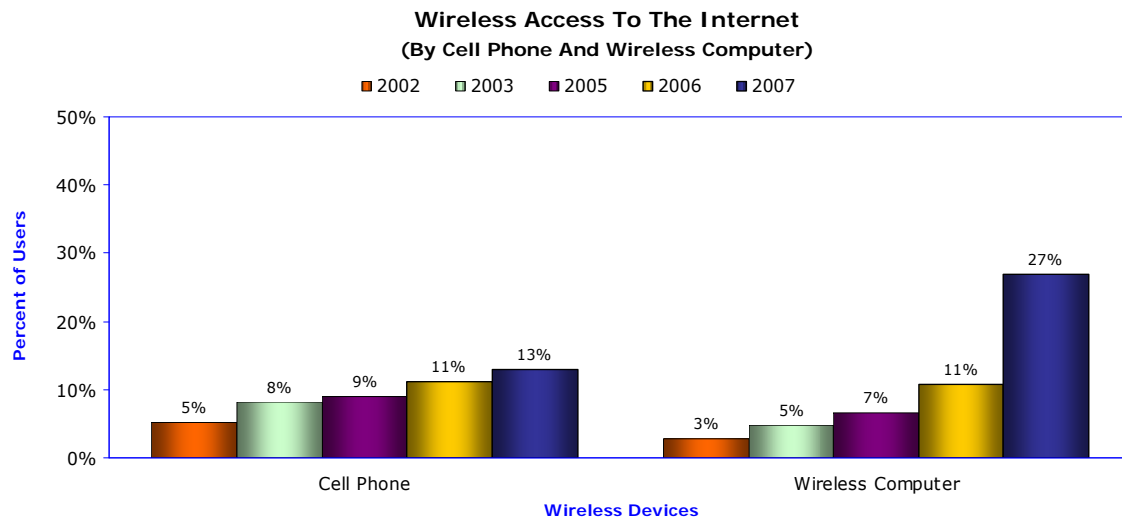


(Q130 JC-3)

Internet Access By Cell Phone And Wireless Computer

The use of cell phones and computers equipped with wireless cards for Internet access continued to increase to their highest levels thus far in the Digital Future Project. Going online by wireless computer more than doubled.

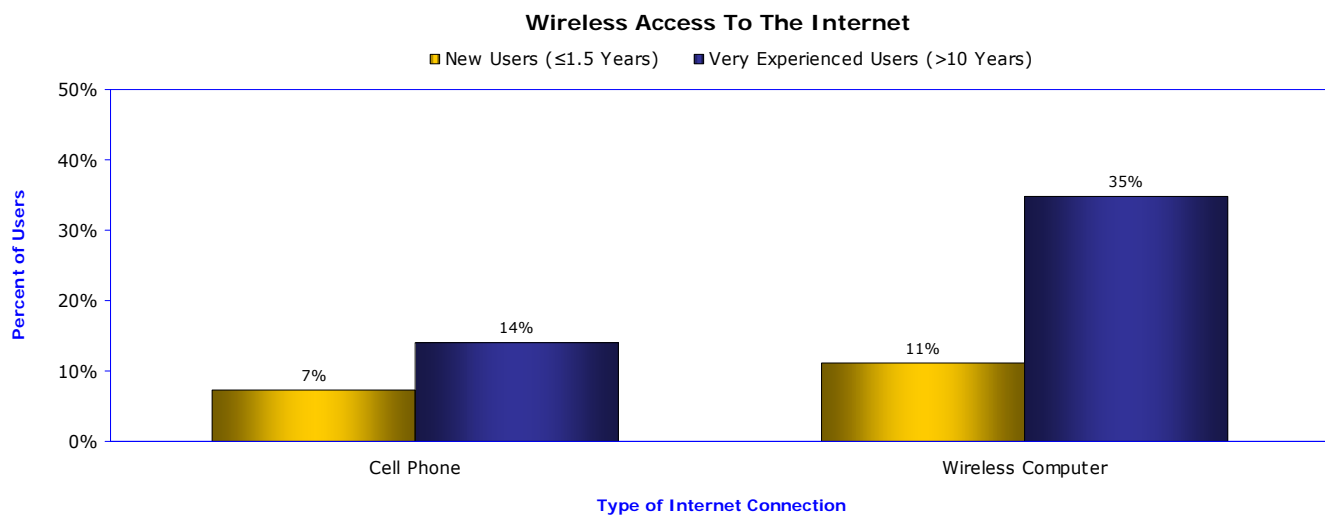
Twenty-seven percent of Internet users said they went online with a wireless computer, up nearly tenfold in only five years.



(Q440 M-3)

Internet Access By Cell Phone And Wireless Computer: New Users Vs. Very Experienced Users

Compared to new users, three times as many very experienced users go online through wireless computers, and twice as many go online through cell phones.



(Q440 M-2)

Communication Technology: How Does It Affect The World?

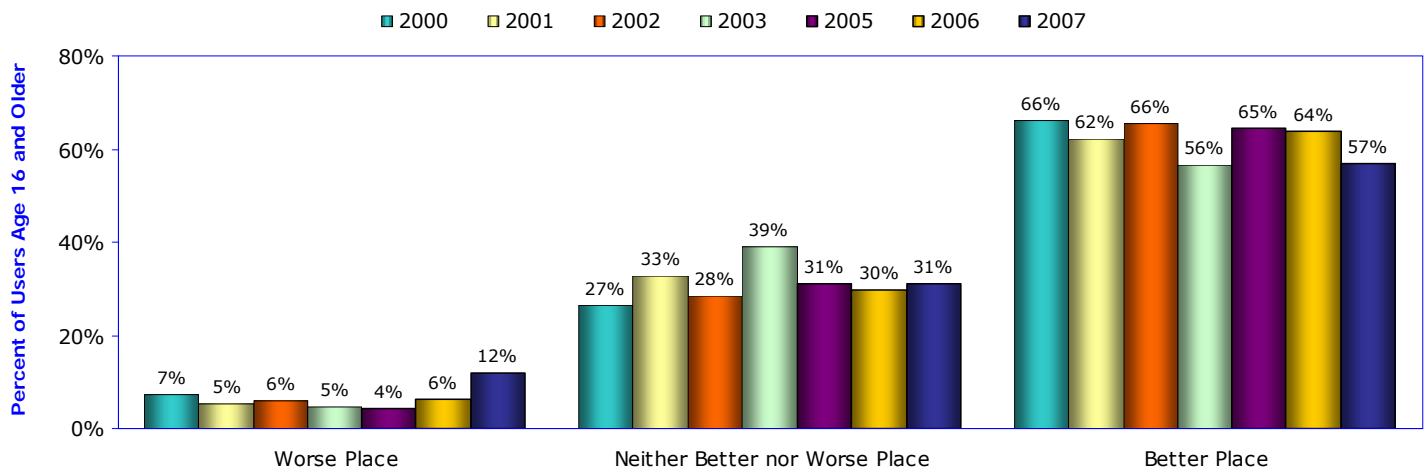
Views Of Internet Users

Internet users and non-users continued to express diverging views about the impact of new communication technology on the world.

Although a large percentage of Internet users in the current study (57 percent) said that new communication technology (the Internet, cell phones, and pagers) makes the world a better place, and that percentage is down.

And, Internet users who report that new communication technology makes the world a worse place (12 percent) doubled over 2006.

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



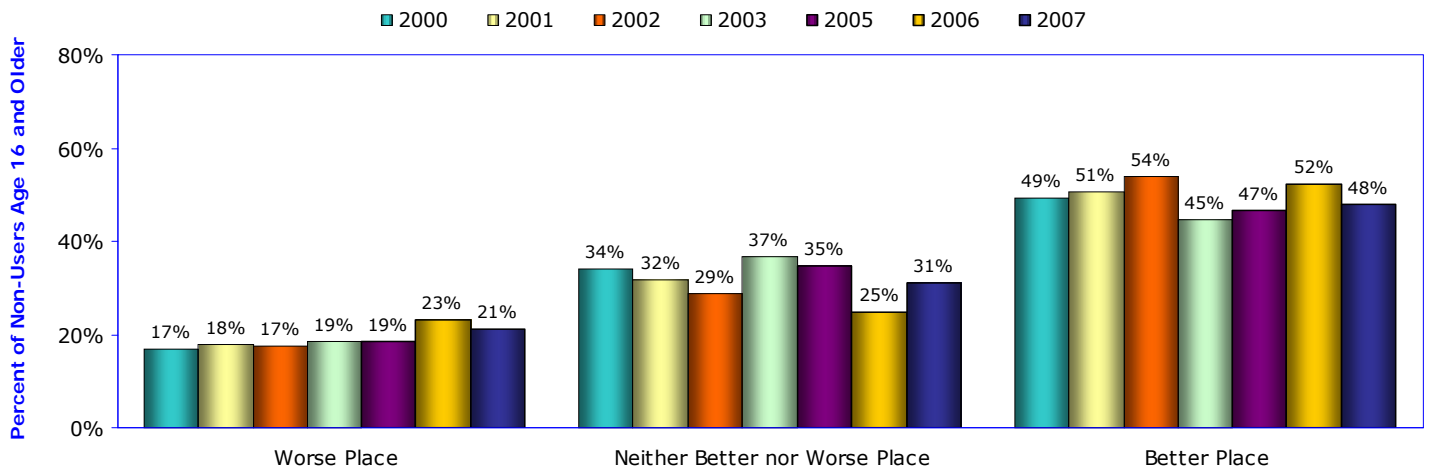
(Q180 M-2)

Communication Technology: How Does It Affect The World? Views Of Non-Users

Non-users continue to express much higher levels of negative views -- almost twice the percentage of non-users compared to users said that new communication technologies make the world a worse place. However, that percent declined slightly from 2006.

At the same time, the percentage of non-users who said that new communication technology makes the world a better place also declined -- this year to less than half of non-users (48 percent).

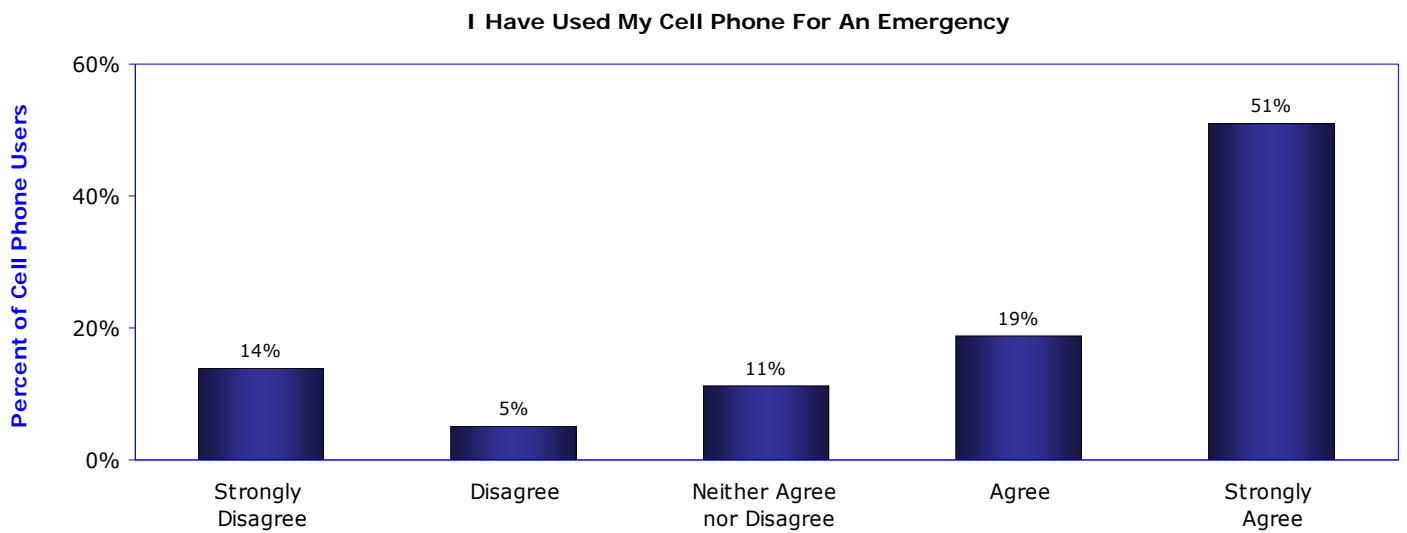
**Has Communication Technology Made The World A Better Place, Or A Worse Place?
(Non-Users)**



(Q180 M-3)

Cell Phones: Are They Used For Emergencies?

In a new question for the Digital Future Project, cell phone users were asked if they have used the phone in an emergency. Seventy percent of cell phone users agreed that they have used their phone in an emergency.



(Q533 M-3)

Internet Non-Users

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

3.3 years

***Will non-users go online
in the next year?***

Yes: 46%

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

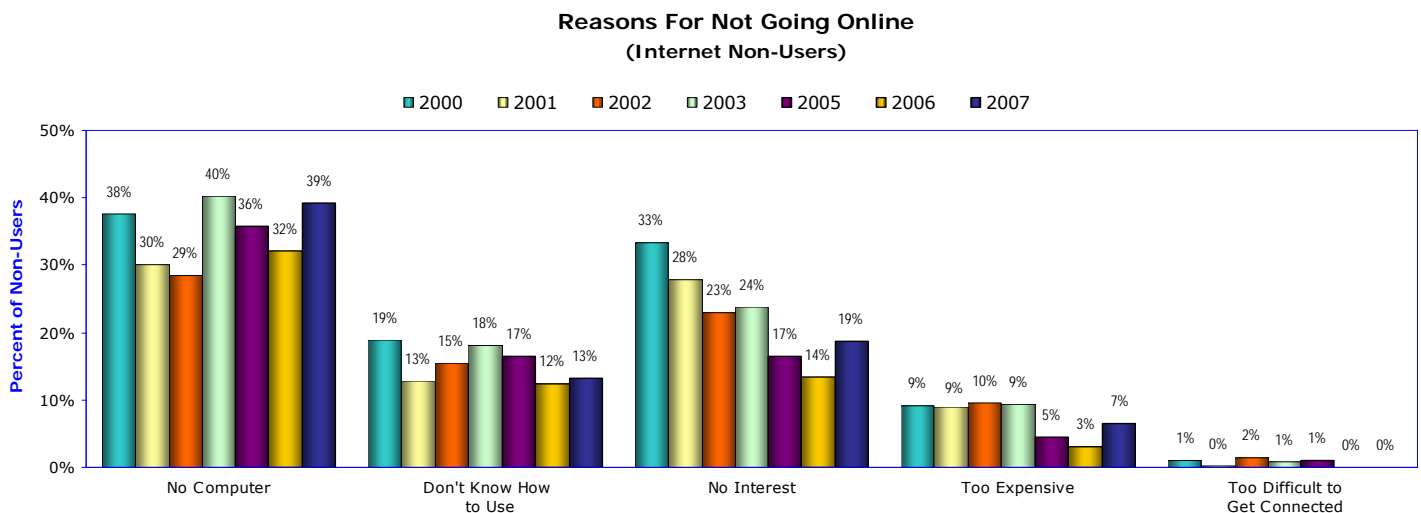
Yes: 34%

Internet Non-Users: Reasons For Not Being Online?

Americans who do not go online continue to offer several explanations for not using the Internet, and all of the four major reasons are increasing in prevalence.

The most common reason for not using the Internet was “no computer” -- the reason cited most often in all seven years of the survey. However, in the current study the percentage of non-users who responded with this reason increased for the first time in three years, and at 39 percent is now near the highest level so far in the history of the Digital Future Project.

Lack of interest, lack of knowledge, and the high expense of acquiring a computer continue to be the next most popular reasons – and the percentages reported for all of these issues increased.



(Q591 JC-2)

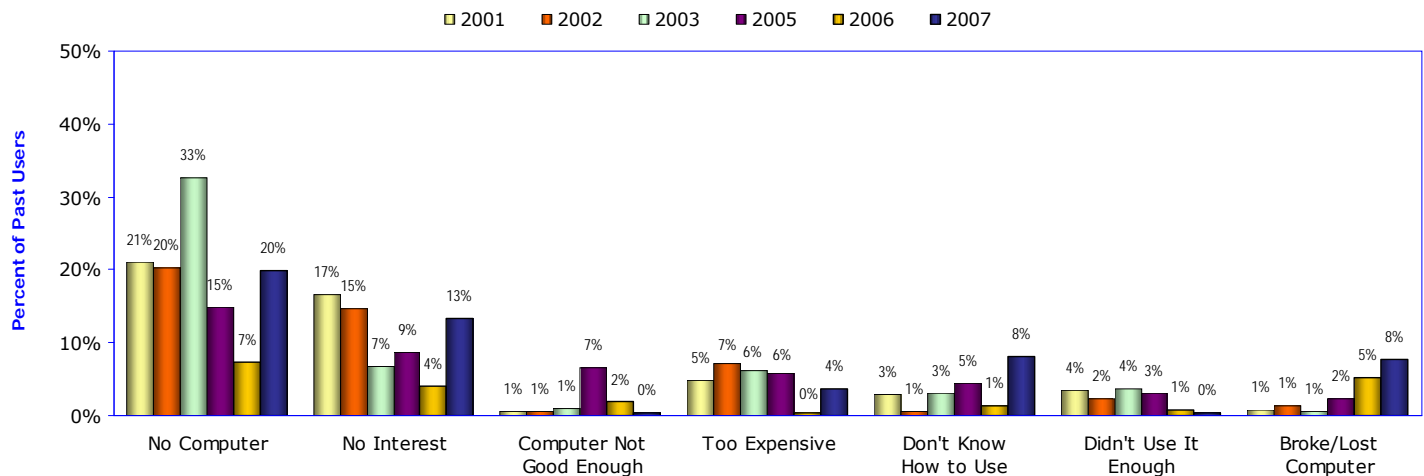
“Internet Dropouts”: Exploring Why Users Stop Going Online

“Internet dropouts” -- those who have previously used the Internet but no longer go online continued to report a variety of reasons for not going online, but their responses shifted considerably.

In the current study, the largest percentage of Internet dropouts reported that the reason they stopped going online is “no computer available” -- a significant increase over 2006.

Two other major reasons for dropping out -- no interest and lack of knowledge (“don’t know how to use”) also increased substantially.

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

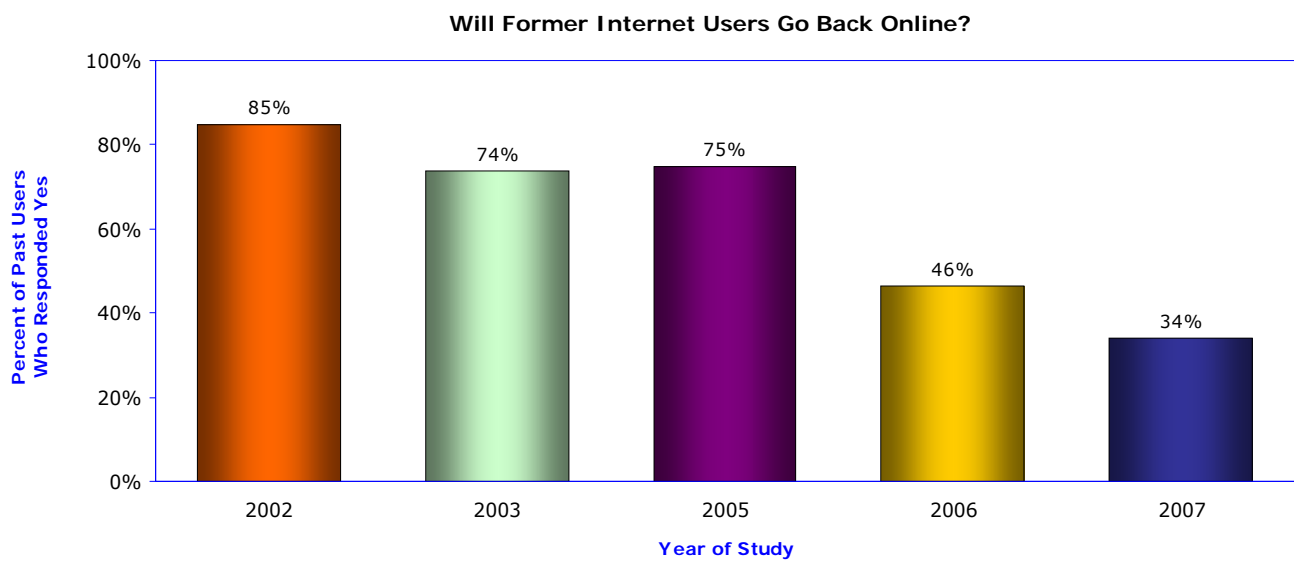


(Q580 JC-2)

Will Internet Dropouts Return To Internet Use?

The number of Internet dropouts who said they will go back online declined to the lowest level in the five years this question has been asked in the Digital Future Project.

Slightly more than one-third of non-users who previously used the Internet (34 percent) said they will go back online, a continuation of a downward trend.



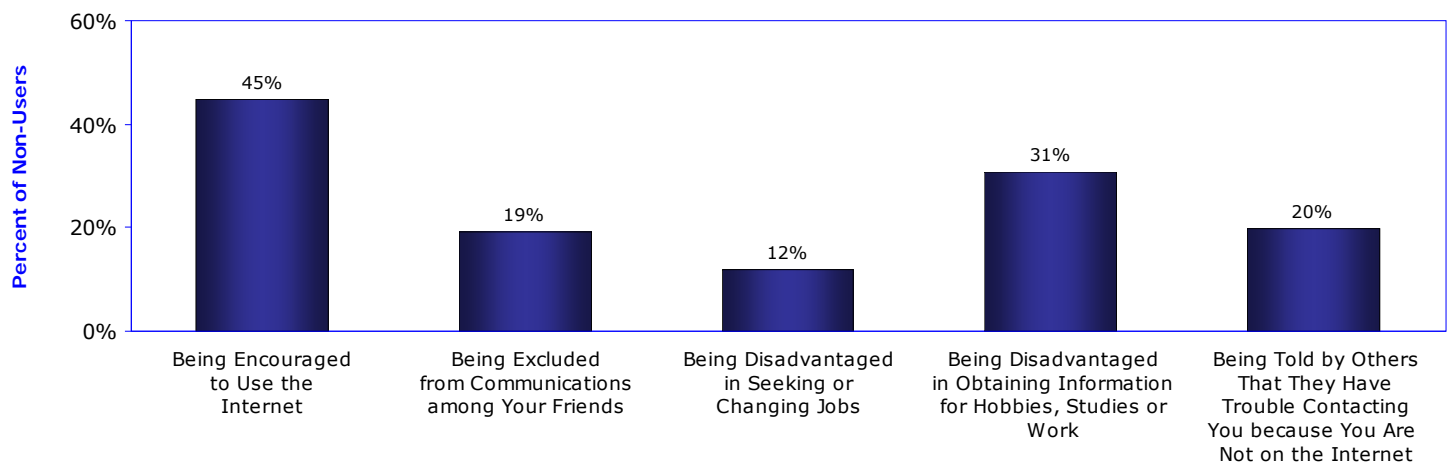
(Q620 JC-2)

Internet Non-Users: Views About Not Going Online

Respondents who do not use the Internet report a variety of disadvantages about not being online, such as being excluded from communications, feeling disadvantaged during job transitions, or having difficulty obtaining information for their jobs or personal interests.

Among non-users, 45 percent report being encouraged by others to use the Internet.

Have You Had Any Of The Following Experiences Because You Are Not An Internet User?



(Q600 JL-1)

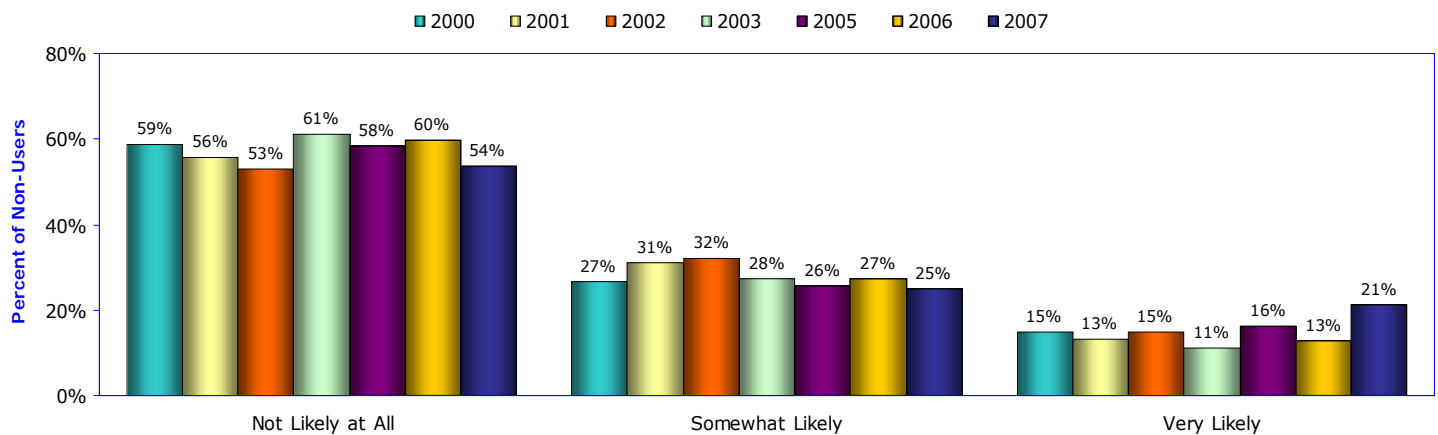
Non-Users: Will They Go Online?

Do Internet non-users plan to go online?

Of the respondents in the current study who are non-users, 46 percent said they are somewhat likely or very likely to go online next year – up from 40 percent in 2006. The percentage of non-users in the current study who are very likely to go online increased substantially to 21 percent, up from 13 percent in 2006.

The percentage of respondents who said they are not likely at all to use the Internet in the next year dropped to 54 percent of non-users -- near the lowest level in the seven years of the Digital Future Project.

How Likely Will You Be To Use The Internet Within The Next Year?



(Q610 JC-2)

Media Use And Trust

***Users who said the Internet
is an important or
very important
source of information***

2006	66%
2007	80%

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

Government Web sites	81%
Established media Web sites	80%
Individuals' Web sites	14%

***Internet users who said most or all
information produced by search engines
is reliable and accurate:***

51%

***Would respondents miss the print edition
of their newspaper if the offline version was
no longer available?***

Agree	52%
Disagree	27%

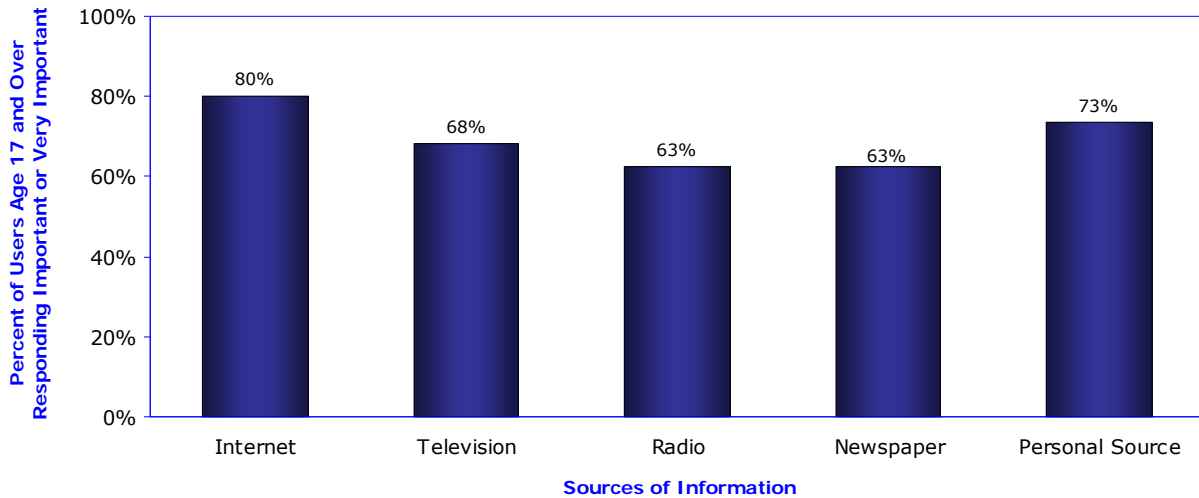
Weekly Television viewing (hours)

Internet users	12.8
Non-users	20.7

Television And The Internet: Importance As Sources of Information and Entertainment

After seven years of studying online behavior and attitudes, the Digital Future Report found that the Internet is perceived by users to be a more important source of information for them -- this over all other principal media, including television, radio, and newspapers.

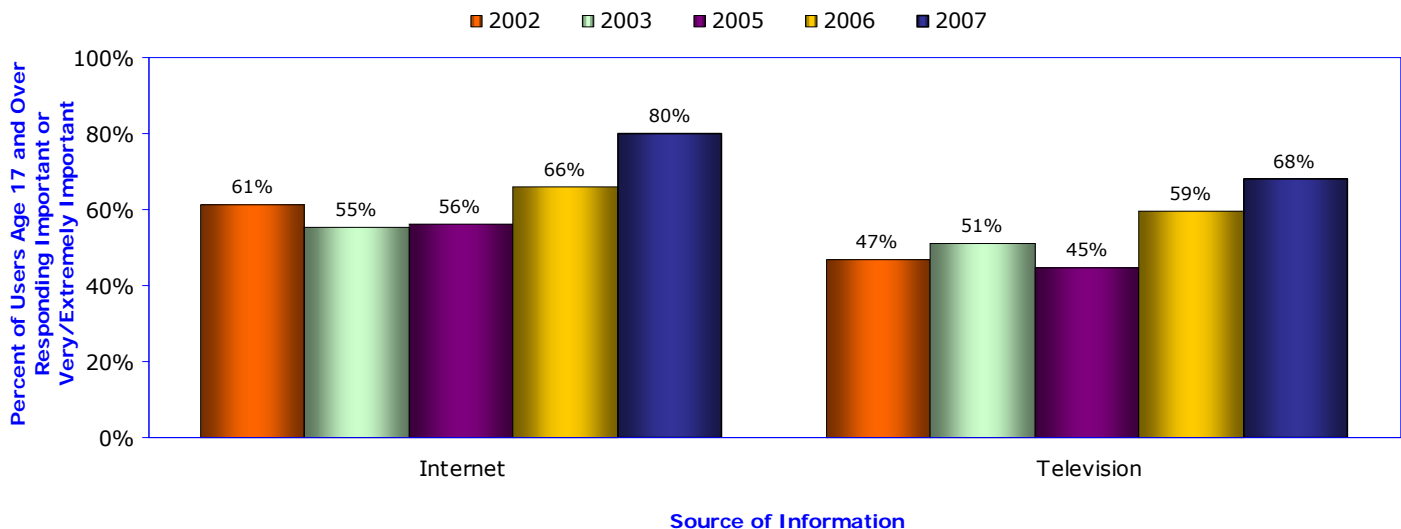
The Internet: Importance As Sources of Information
(Internet Users Age 17 and older)



(Q530 JC-1)

Eighty percent of Internet users age 17 and older consider the Internet to be an important or very/extremely important source of information for them -- up from 66 percent in 2006.

The Internet And Television: Importance As Sources of Information
(Internet Users Age 17 and older)



(Q530 JC-1 combined)

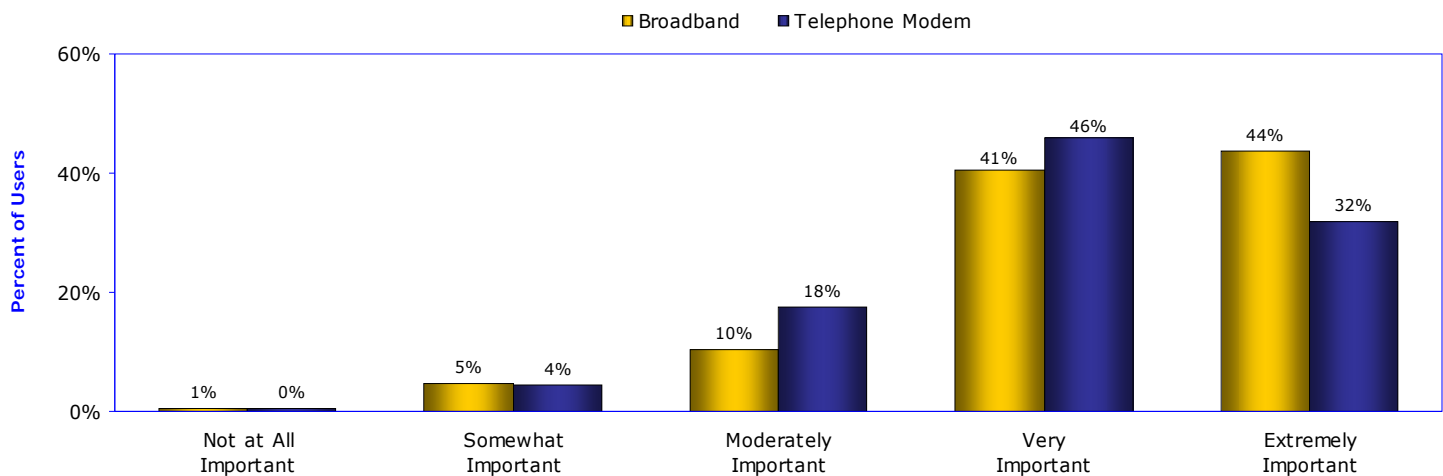
The Importance Of The Internet As An Information Source: Broadband Users Vs. Telephone Modem Users

Large and growing percentages of both broadband users and telephone modem users in the current study said that the Internet is the most important source of information for them.

Eighty-five percent of broadband users consider the Internet a very important or extremely important source of information for them, up from 75 percent in 2006.

Among telephone modem users, 78 percent said the Internet was a very important or extremely important source of information, a significant increase from 60 percent in 2005.

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

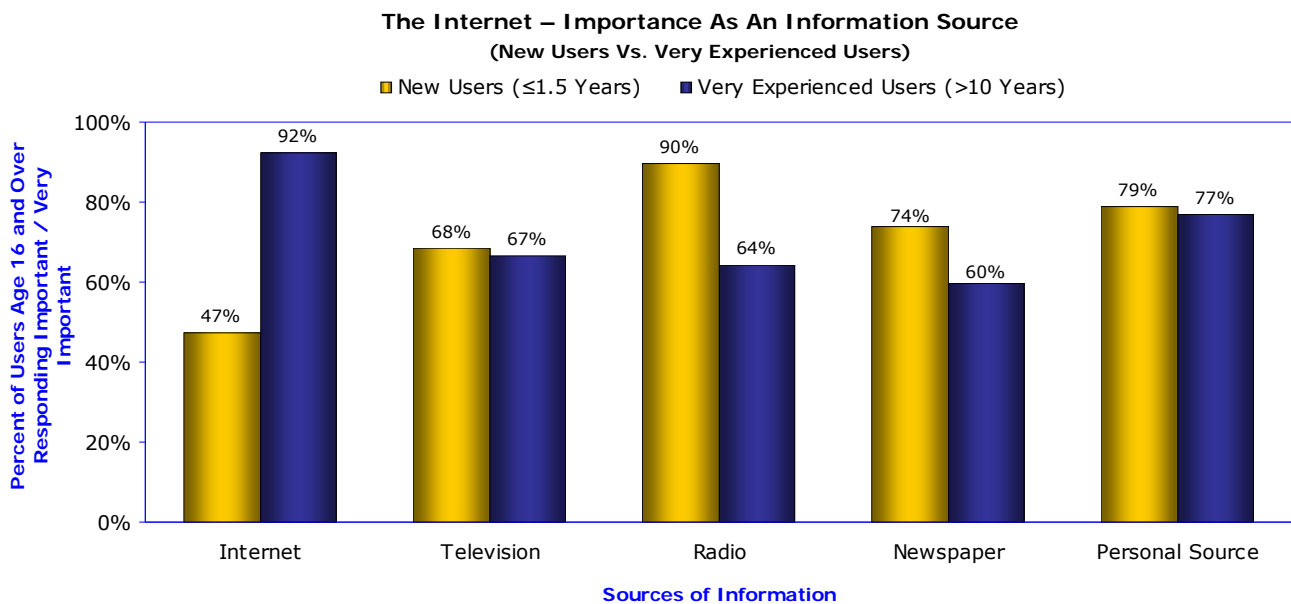


Q530 JC-4

The Importance Of The Internet As A Source of Information and Entertainment: New Users Vs. Very Experienced Users

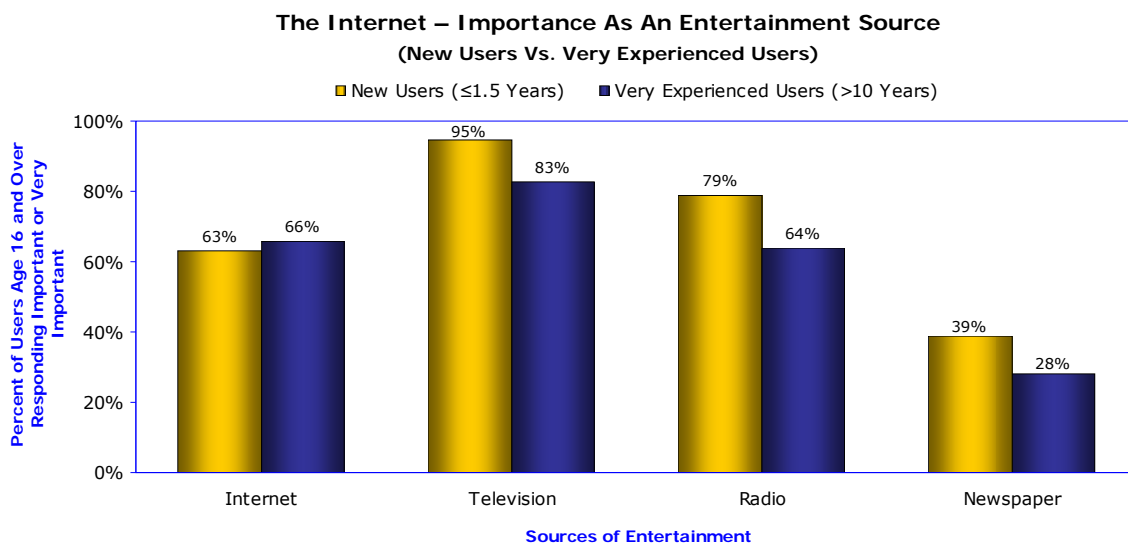
Almost twice the percentage of very experienced users (92 percent) compared to new users (47 percent) consider the Internet as an important or very important source of information for them.

A large percentage of new users (90 percent) consider radio an important source of information for them, compared to 64 percent of very experienced users. Very experienced users and new users in almost equal percentages consider television an important or very important source of information for them.



(Q530 JC-2)

Almost equal percentages of new users and very experienced users consider the Internet an important or very important source of entertainment for them.



Information Online: Is It Reliable?

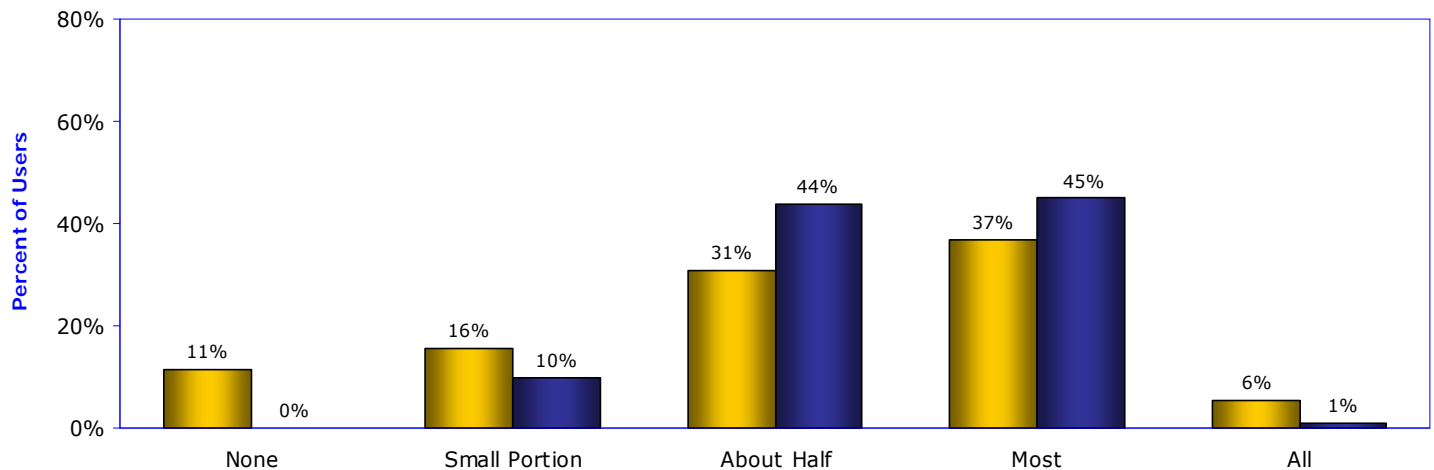
Higher percentages of Internet users than non-users reported that most or all of the information online is reliable.

In the current Digital Future Project, 46 percent of Internet users said that most or all of the information online is generally reliable -- this compared to 43 percent of non-users who gave the same response.

A much higher level of non-users (6 percent) compared to users (1 percent) said that all of the information on the Internet is generally reliable. At the other extreme, 27 percent of non-users said none or only a small portion of the information on the Internet was generally reliable, compared to 10 percent of users.

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

■ Non-Users ■ Users



(Q160 M-1)

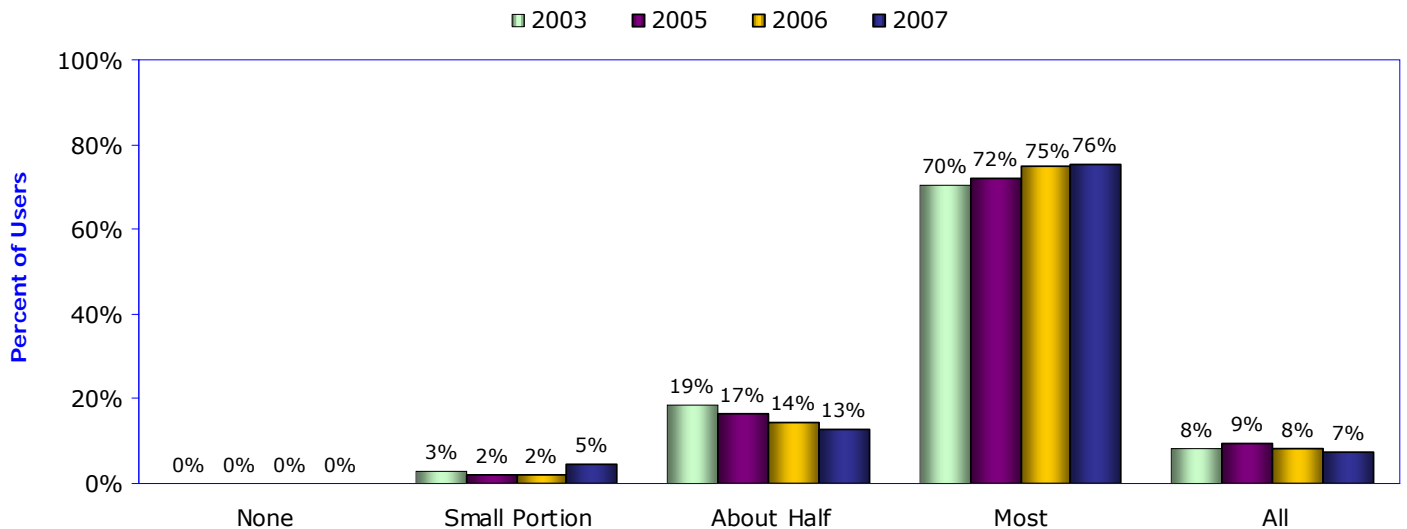
Online Information: Reliability And Accuracy Of Frequently-Visited Web Sites

Steadily increasing percentages of Internet users find high degrees of reliability and accuracy on their favorite Web sites.

In the current Digital Future Project, 83 percent of users said that most or all of the information on Web sites they visit regularly is reliable and accurate -- the same percentage as in 2006 and slightly higher than 81 percent in 2005.

The percentage of users who said that only about half or less of the information on the Web sites they visit regularly is reliable and accurate continued to decline.

**How Much Of The Information On The World Wide Web Sites
That You Visit Regularly Do You Think Is Reliable?
(Internet Users)**



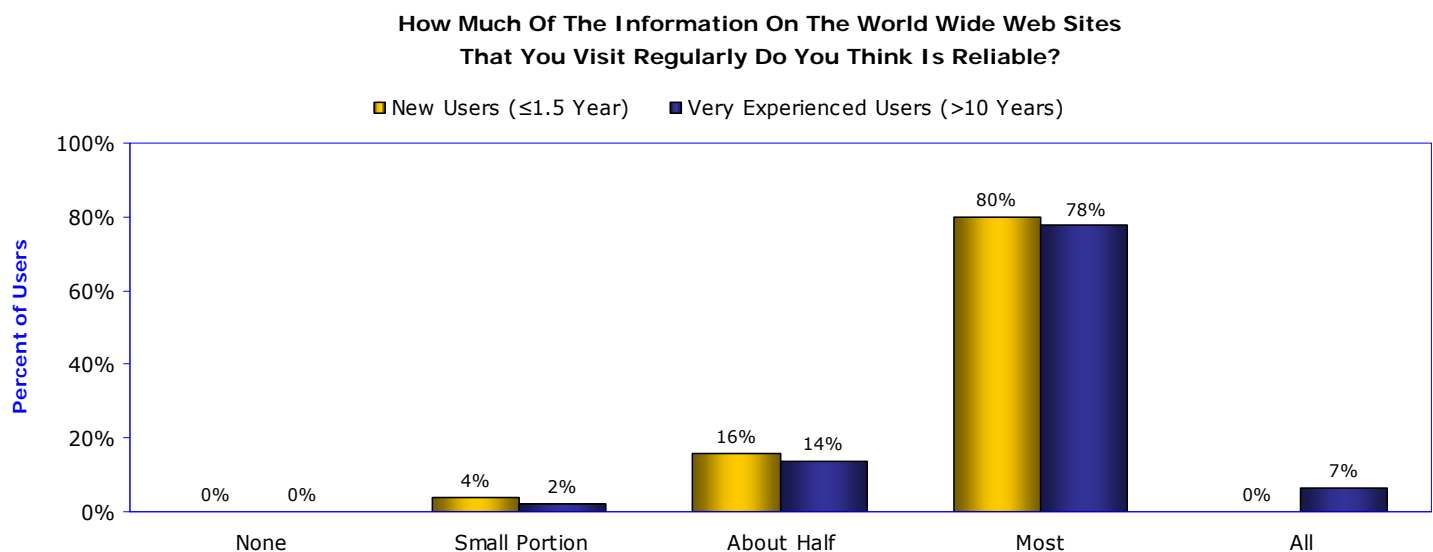
(Q170 M-5)

New Users Vs. Very Experienced Users: Views About The Reliability And Accuracy Of Online Information

In a comparison of new Internet users to very experienced users, the Digital Future Project found similar views about the reliability and accuracy of online information.

Among very experienced Internet users, 85 percent said that most or all of the information on the Web sites they visit regularly is reliable and accurate -- this compared to 80 percent of new users.

Only 20 percent of new users and 16 percent of very experienced users said that half or less of the information on the Web sites they visit regularly is reliable and accurate.



(Q170 M-4)

Web Sites: Which Are Reliable And Which Are Not?

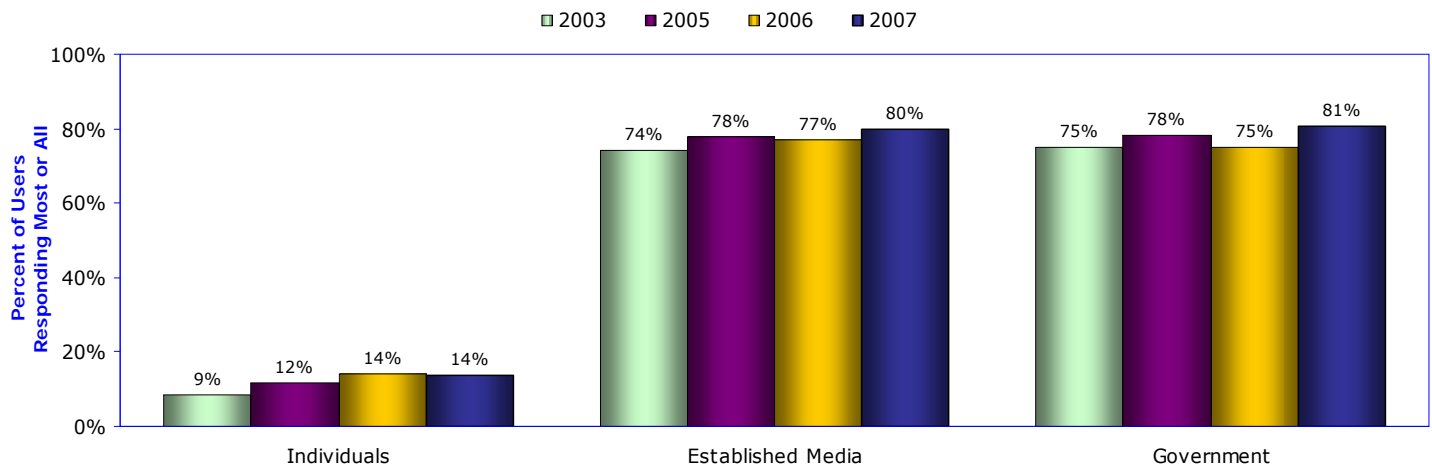
The percentage of Internet users who said that most of the information posted by established media and government Web sites is reliable and accurate remains consistent with the three previous studies in which these questions were asked.

In the current Digital Future Project, 81 percent of Internet users said that government Web sites were generally reliable and accurate -- up from the 75 percent who reported the same response in 2006.

Faith in news pages posted by established media (such as nytimes.com and cnn.com) also increased; 80 percent of users said those sites were generally reliable and accurate -- an increase over the 77 percent response in 2006.

Information pages posted by individuals received its traditionally low positive response, with only 24 percent of users saying that most or all of information posted by individuals is reliable and accurate -- the same as in 2006.

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



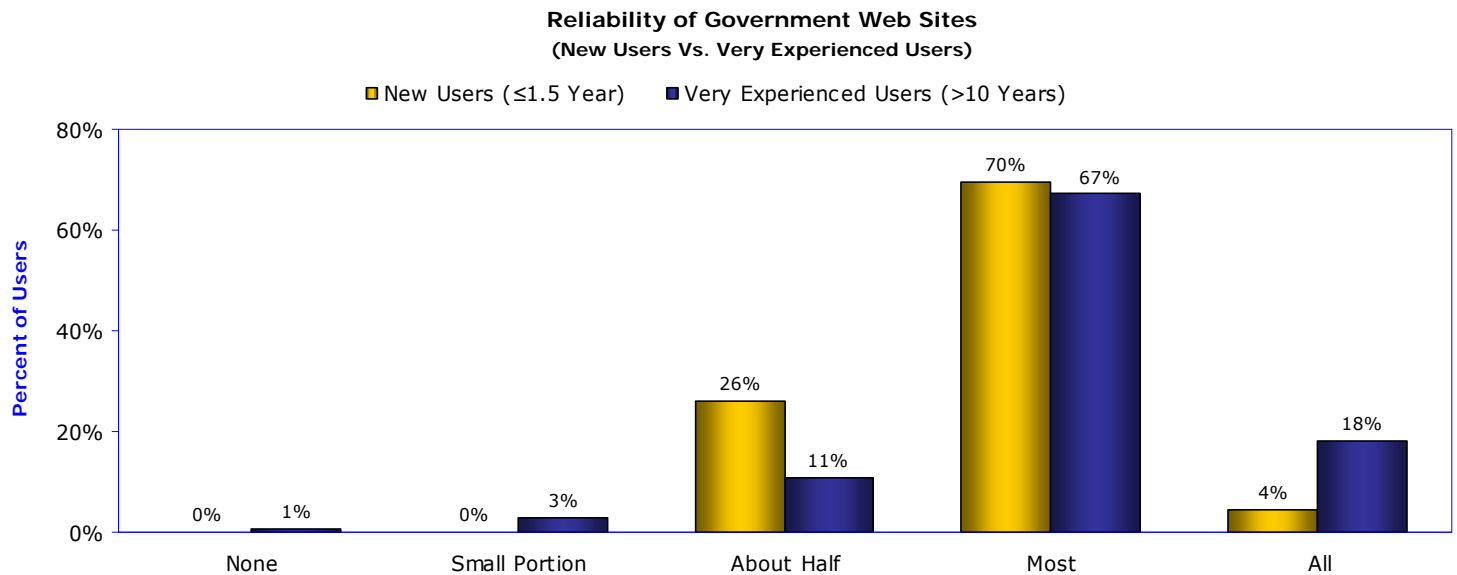
(Q173 M-3, M-6, M-9)

Government Web Sites: Views Of New Users And Very Experienced Users

When exploring the reliability and accuracy of information posted online, of special interest continues to be the difference in views between new users and very experienced users about the reliability and accuracy of government Web sites.

Among new Internet users, 74 percent said that most or all of the information posted on government Web sites is reliable and accurate. An even higher percentage of very experienced users -- 85 percent -- report that same response.

The 74 percent response among new users represents a large increase from the 49 percent who reported these responses in 2006. (Among very experienced users in 2006, 79 percent said most or all information on government Web sites is reliable and accurate).



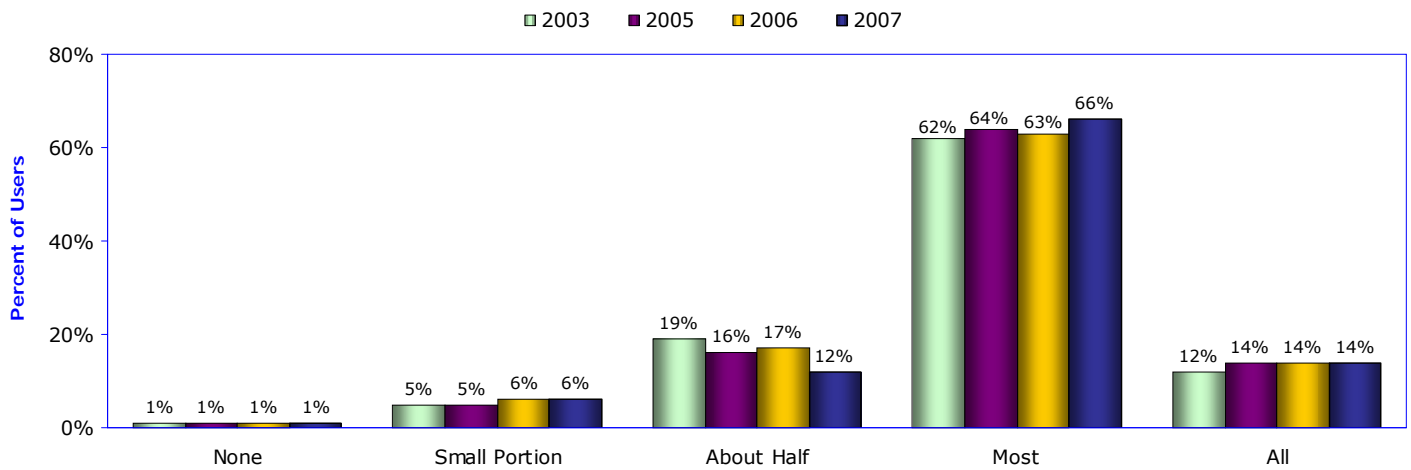
(Q173 M-8)

Media Web Pages: Reliability And Accuracy

Internet users continue to report high levels of reliability and accuracy for Web pages posted by established media, such as The New York Times and CNN.

Among all users, 80 percent said that most or all of the information posted on media Web sites is reliable and accurate -- up from 77 percent in 2006.

**Reliability of News Pages Posted By Established Media
(Internet Users)**



(Q173 M-3)

Media Web Pages:

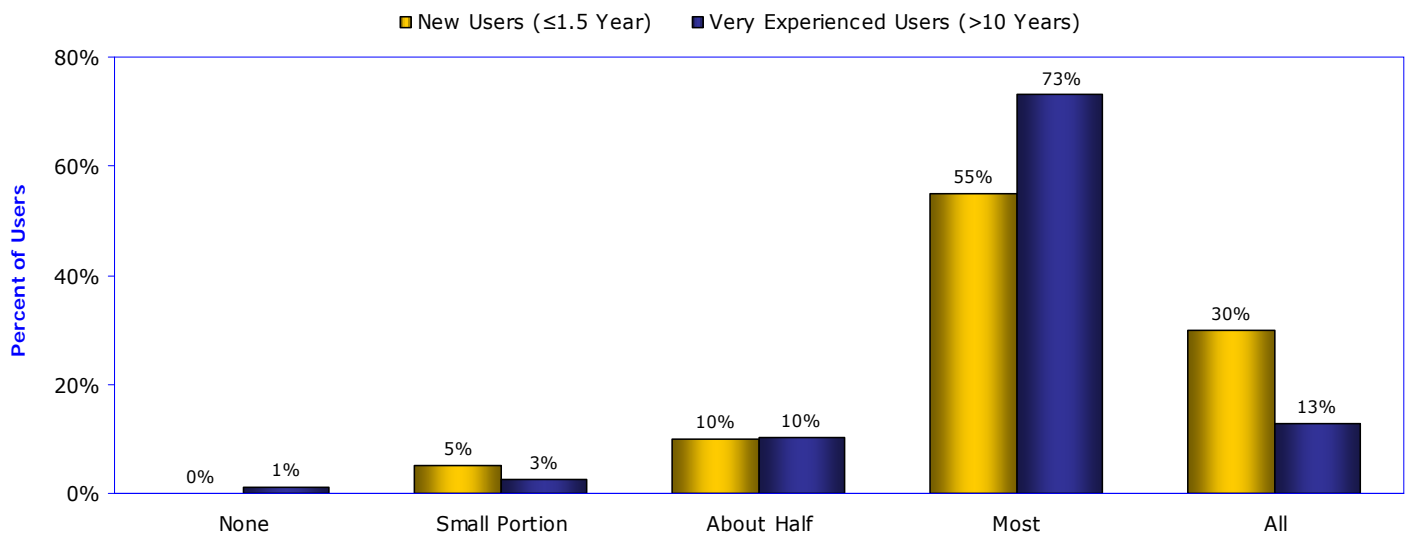
Views Of New Users Vs. Very Experienced Users About Reliability And Accuracy

New users and very experienced users report similar views about the reliability and accuracy of news pages posted by established media -- a change from 2006.

In the current Digital Future Project, almost identical percentages of new users and very experienced users reported that most or all of the information on news pages posted by established media is reliable and accurate (85 percent of new users, and 85.9 percent of very experienced users).

Both of these percentages are higher than in 2006, and the positive response for new users is substantially higher. In 2006, 57 percent of new users and 82 percent of very experienced users said that most or all of the information on news pages posted by established media is generally reliable and accurate.

**Reliability of Established Media Web Sites
(Internet Users)**



(Q173 M-2)

Search Engines: User Views

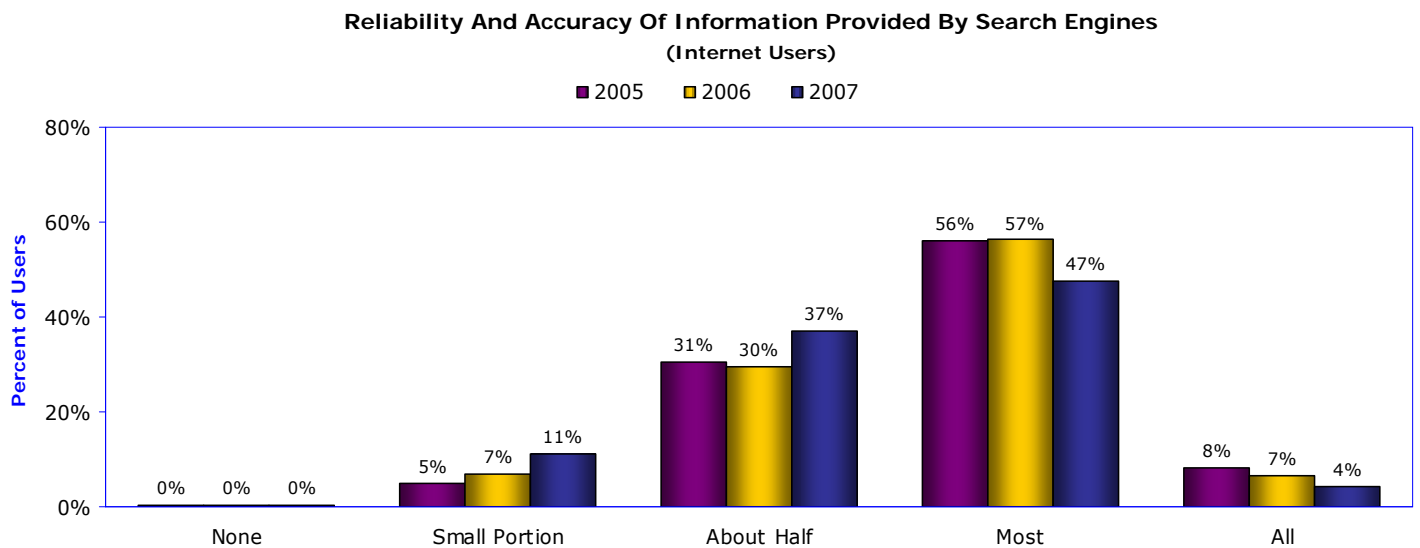
Internet users' views about the reliability of information provided by search engines shifted considerably in the current Digital Future Project.

Search Engines: Reliability and Accuracy

A higher percentage of Internet users reported negative views about the reliability and accuracy of information provided by search engines, such as Google.

Slightly over half of Internet users -- 51 percent -- said that most or all of the information produced by search engines is reliable and accurate -- down from the 62 percent who reported the same response in 2006.

The number of users who said that only a small portion or half of the information provided by search engines was reliable and accurate increased to 48 percent of Internet users.



(Q173 M-12)

Search Engines: Views Among New Users Vs. Very Experienced Users About Reliability And Accuracy

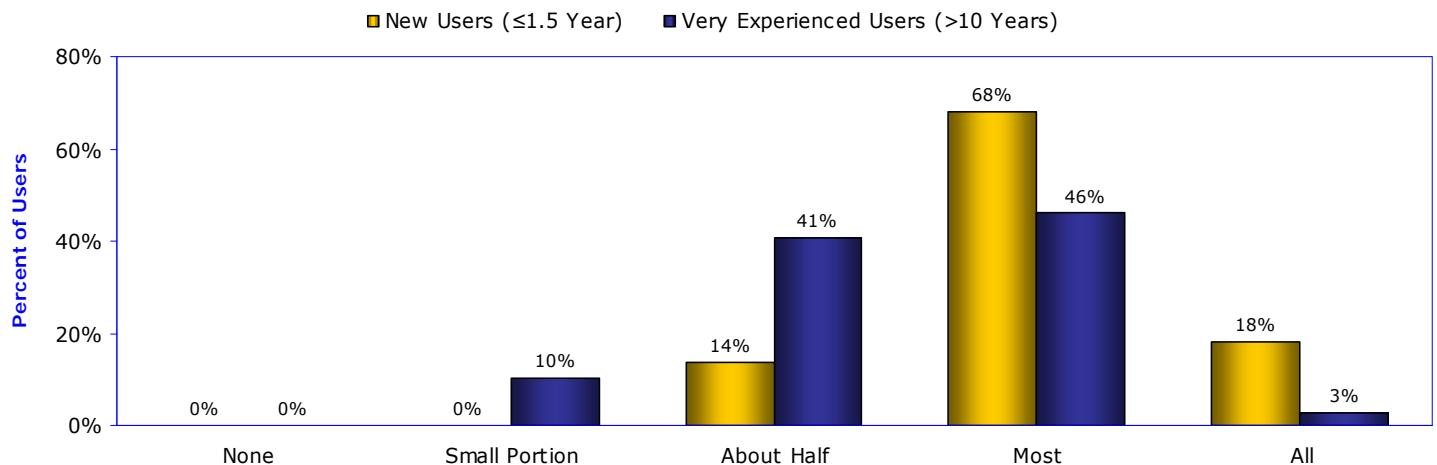
The views of very experienced Internet users echo the sentiment of users overall about the reliability of information provided by search engines.

Among very experienced users, 48.9 percent said the information provided by search engines was generally reliable and accurate, down from 58 percent of very experienced users who reported the same response in 2006.

New users reported much higher confidence in search engines; more than three-quarters (76.4 percent) said the information provided by search engines was reliable and accurate, compared to 55 percent who reported the same response in 2006.

Of particular note is the 40.8 percent of very experienced users who said that only half of search information was reliable and accurate -- up from 34 percent in 2006.

How Much Of The Information Provided By Search Engines Is Generally Reliable and Accurate?
(New Users Vs. Very Experienced Users)



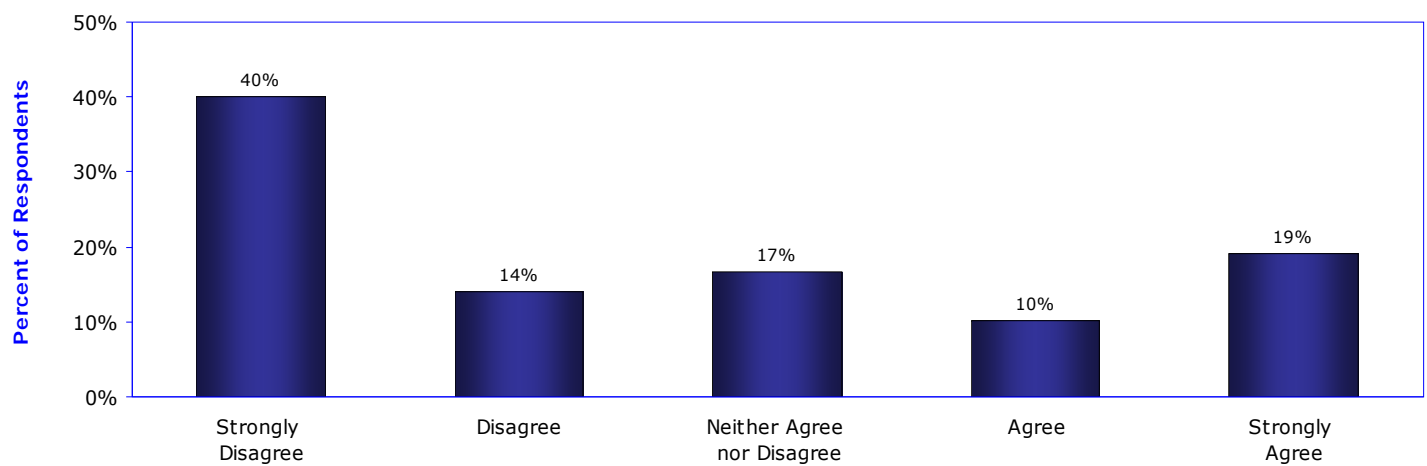
(Q173 M-11)

Time-Shifting Of TV Viewing

A large minority of respondents are time-shifting their TV viewing.

In a new question for the Digital Future Project, 29 percent of respondents agreed with the statement, “I often watch television shows that have been recorded with a VCR or a digital video recorder such as Tivo.”

I Often Watch Television Shows That Have Been Recorded With a VCR Or A Digital Video Recorder Such As Tivo



(Q533 M-8)

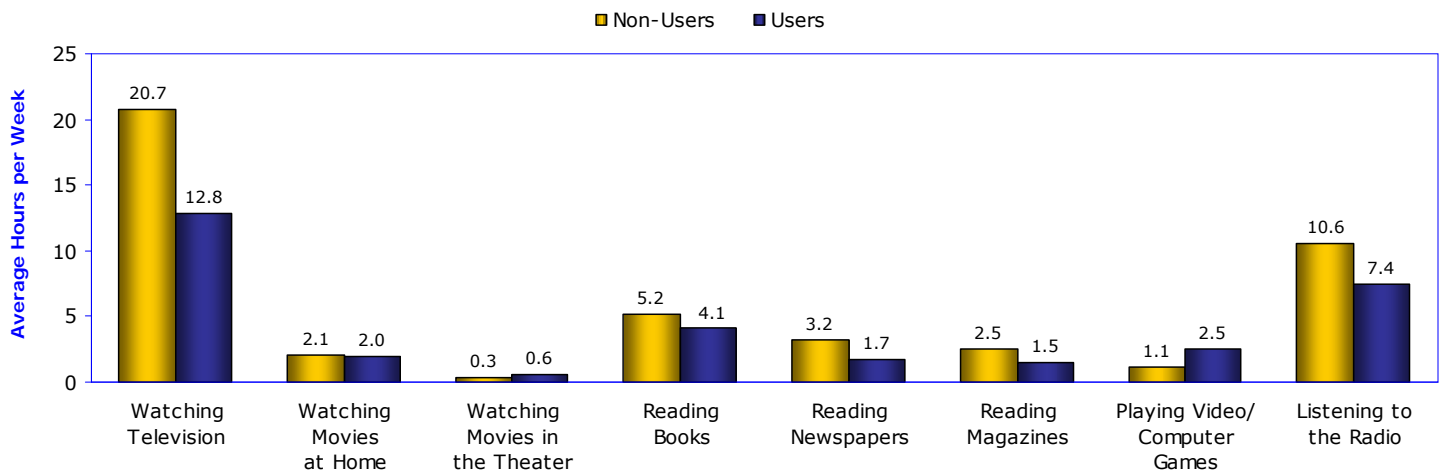
Offline Media: Internet Users and Non-Users

Internet non-users reported spending more time than users engaged in all of the principal offline activities involving media, with the exception of playing video games.

The largest difference between Internet non-users and users is the amount of time they spend watching television -- non-users watch seven hours more per week than users.

Internet non-users reported spending four hours more per week than users listening to the radio. Non-users also reported spending more time reading books, reading newspapers, and watching movies at home.

**During A Typical Week, How Many Hours Of Your Leisure Time, If Any,
Do You Spend With The Following Activities Not Online?**



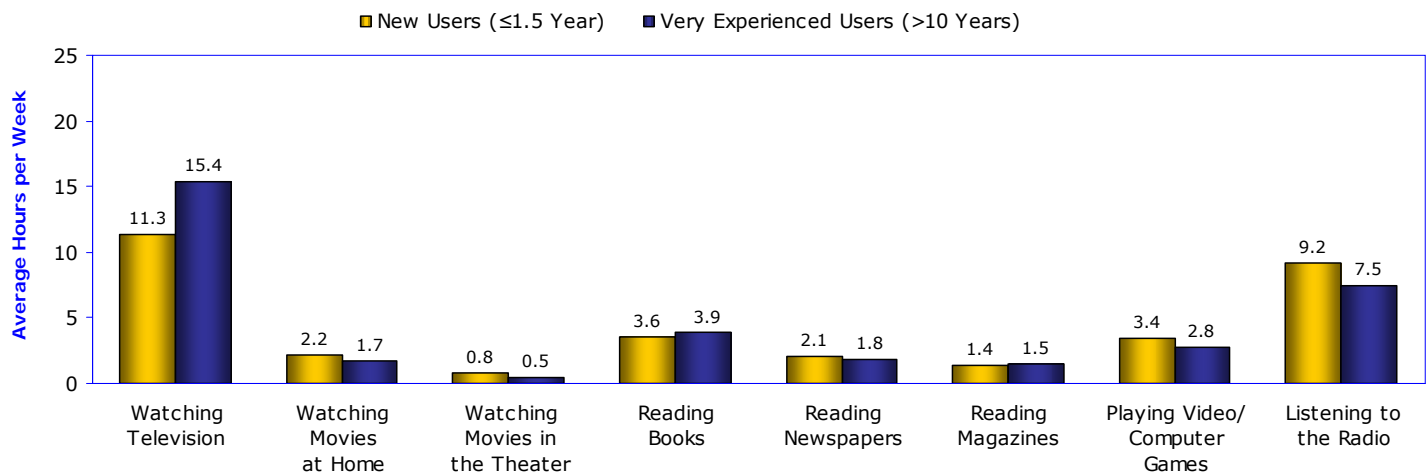
(Q690 M-2)

Offline Media: New Users And Very Experienced Users

In general, new Internet users and very experienced users reported spending about the same amount of time involved in most offline media -- with the exception of television viewing.

New Internet users and very experienced users reported a large difference in their offline television viewing, with very experienced users watching four hours more per week than new users.

**During A Typical Week, How Many Hours Of Your Leisure Time, If Any,
Do You Spend With The Following Activities Not Online?
(New Users Vs. Very Experienced Users)**



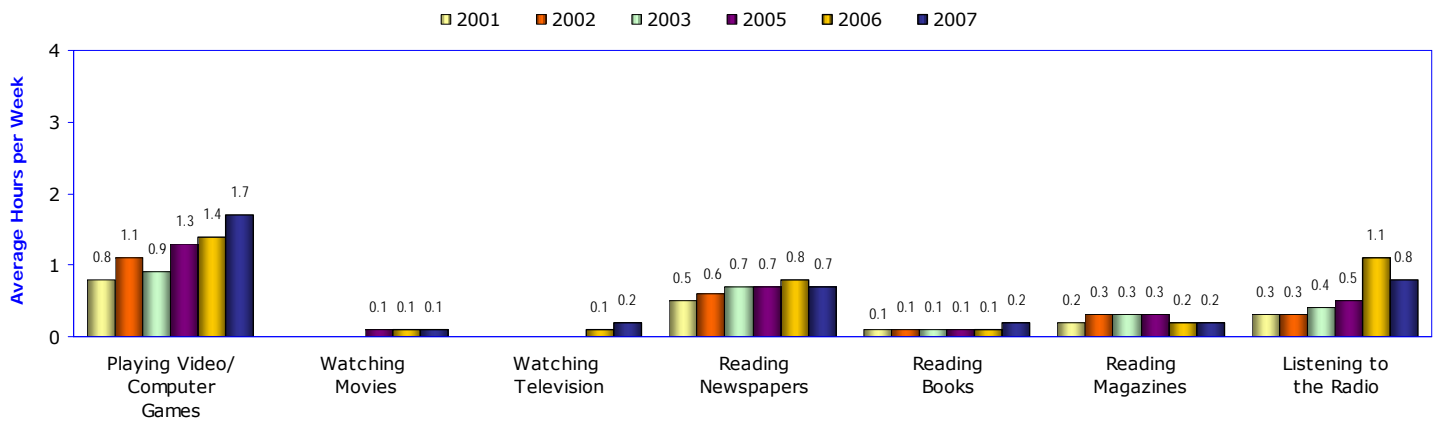
(Q690 M-3)

Trends In Online Media Use

Previous Digital Future Projects traced the general trend upward in the levels of use of many online media -- but the use of most online media stabilized.

Users spend the largest amount of online leisure time playing computer games, which is at its highest level in the six years this question has been asked.

**During A Typical Week, How Many Hours Of Your Leisure Time,
If Any, Do You Spend With The Following Activities Online
(Internet Users)**



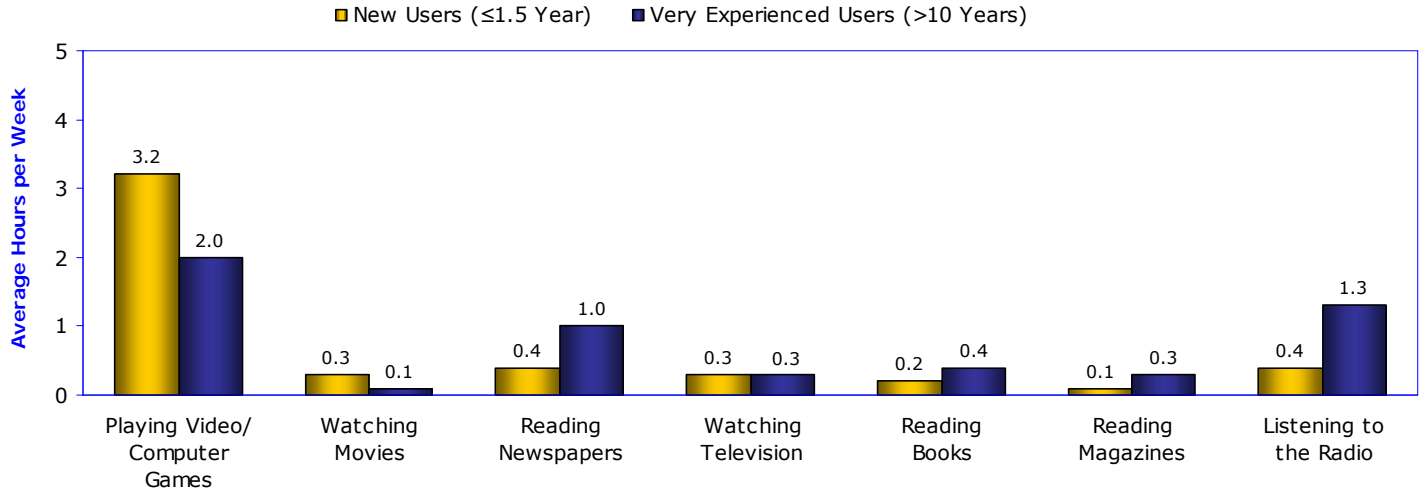
(Q700 M-3)

Media Online: New Users And Very Experienced Users

New users and very experienced users report wide differences in use of a variety of online media.

New users spend considerably more time online playing computer games -- an average of 1.2 hours per week more than very experienced users. Very experienced users spend more time than new users reading online newspapers, books, and magazines, and listening to online radio.

**During A Typical Week, How Many Hours Of Your Leisure Time,
If Any, Do You Spend With The Following Activities Online
(New Users Vs. Very Experienced Users)**



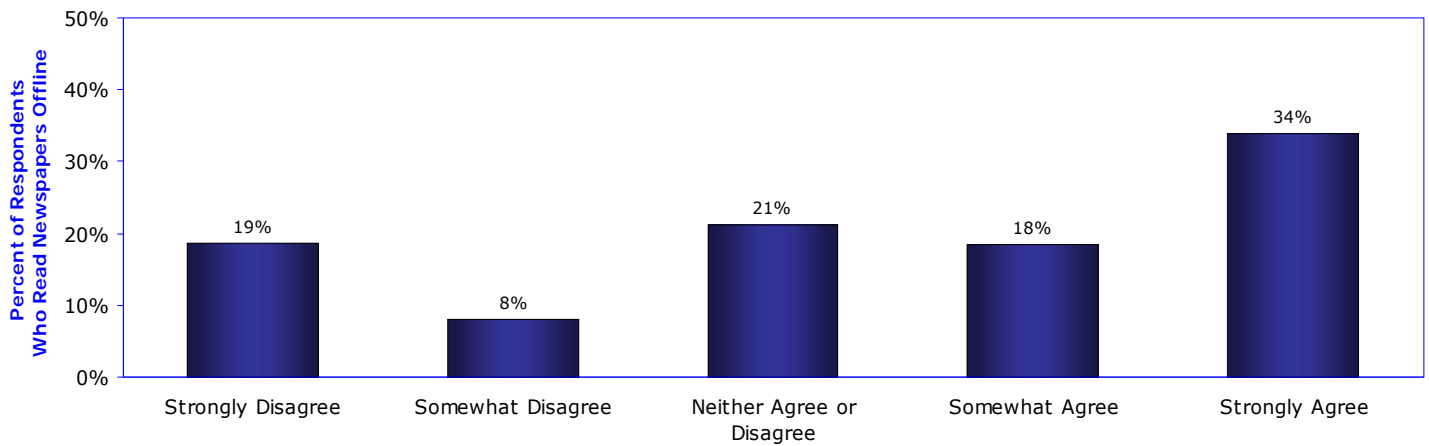
(Q700 M-2)

Would You Miss The Print Edition Of Your Newspaper?

Is the print newspaper dying?

In a new question for the Digital Future Project, respondents who read print editions of newspapers were asked if they would miss the offline edition if it was no longer available. While more than half of respondents (52 percent) expressed some level of agreement with this question, 27 percent disagreed.

I Would Miss The Print Edition Of My Newspaper If It Was No Longer Available

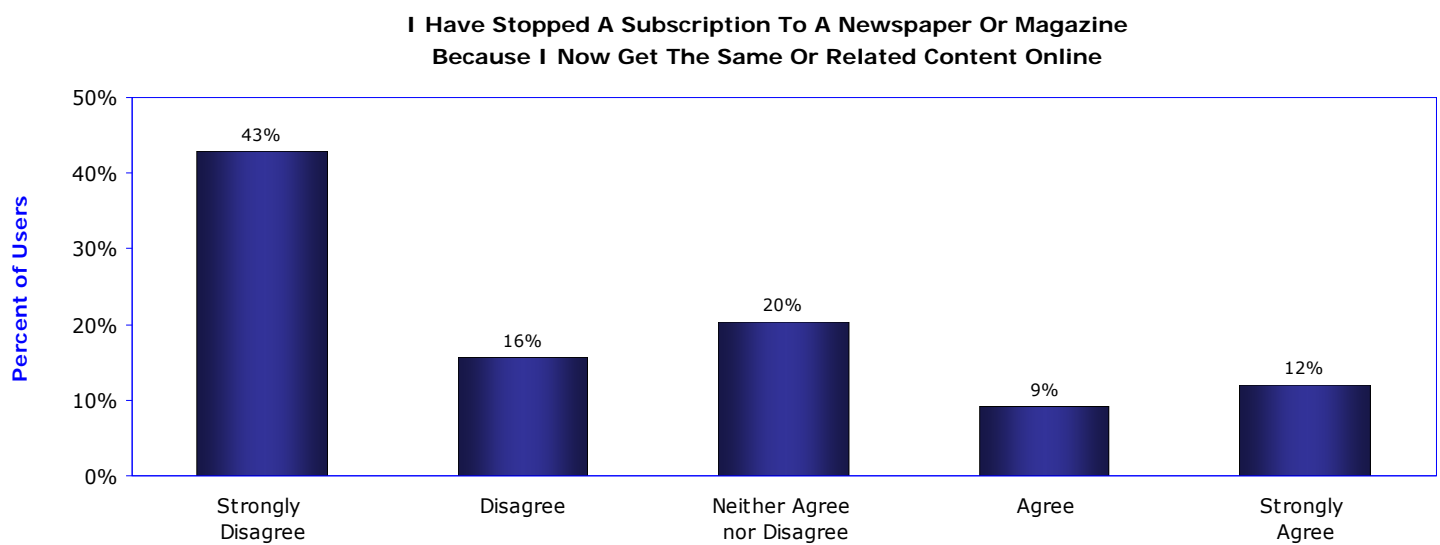


(Q703 JL-1)

Does Online Content Lead to Cancelled Print Subscriptions?

A new question for the Digital Future Project found that 21 percent of Internet users agreed that they have stopped a subscription for a newspaper or magazine because they now get the same or related content online.

Sixty percent disagreed with this statement.

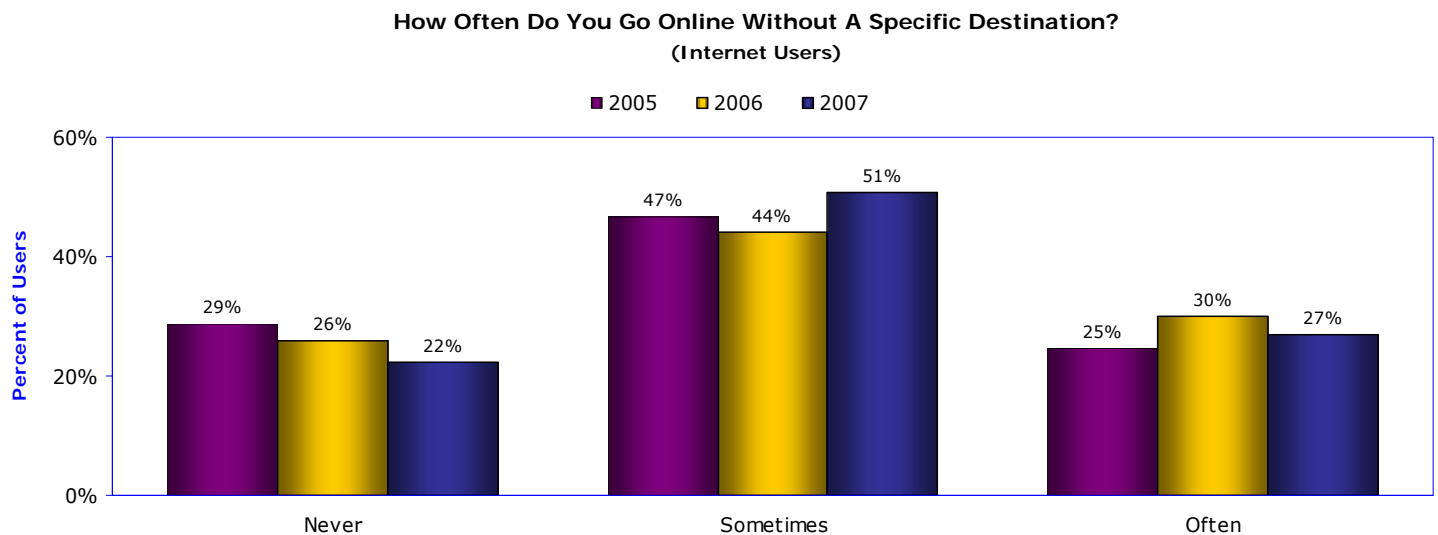


(Q533 M-5)

Surfing The Web

Web surfing -- exploring the Internet without a specific destination -- has been a favorite activity among Internet users since online portals opened to the public. For the third year, the Digital Future Project has explored Web surfing, asking Internet users how often they go online without a specific destination.

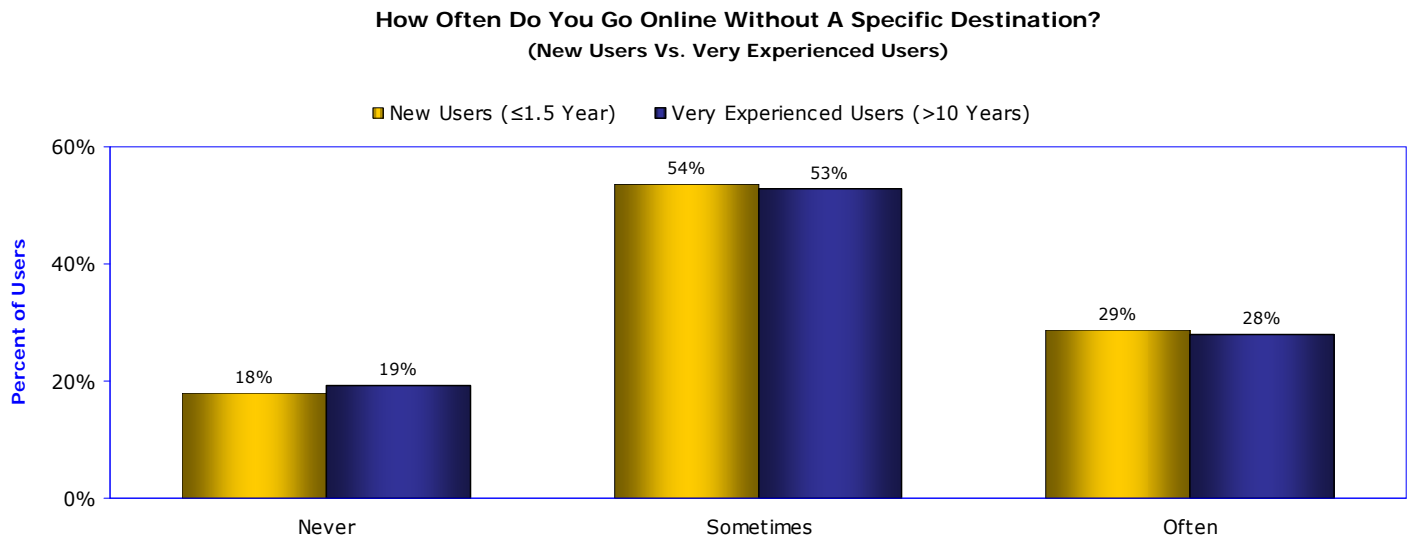
In the current Digital Future Project, more than three-quarters of Internet users (78 percent) sometimes or often go online without a specific destination in mind, up from 74 percent in 2006. Only 22 percent of Internet users never go online without a specific destination, down from almost 29 percent two years ago.



(Q292 M-3)

Surfing The Web: Comparing New Users and Very Experienced Users

New users and very experienced users in almost equal percentages reported that they Web surf. Eighty-two percent of new users explore the Internet without a specific destination, compared to 81 percent of very experienced users.

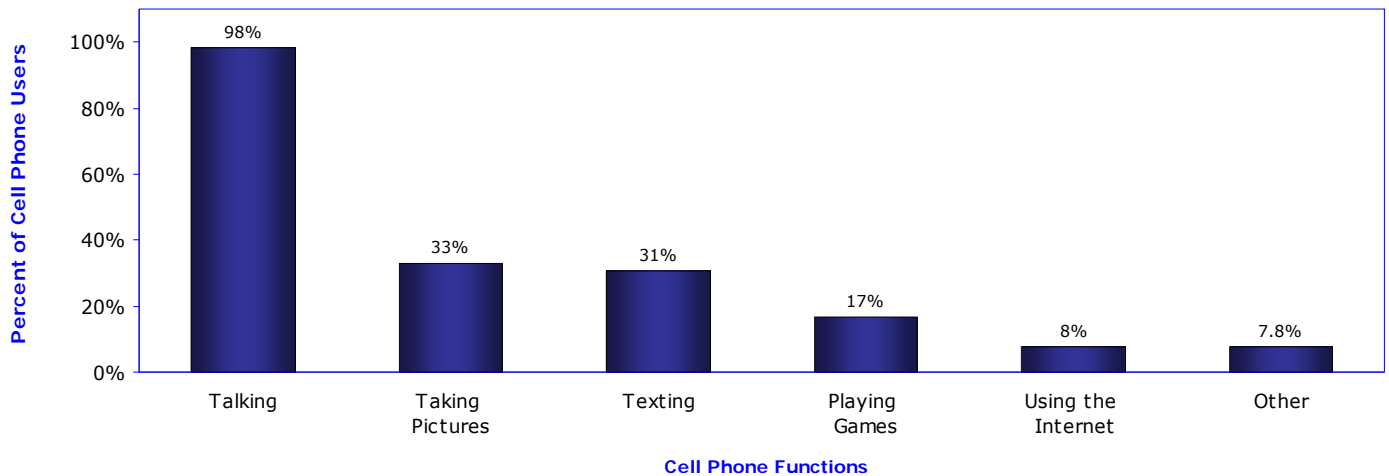


(Q292 m-2)

Cell phone And Multiple Uses

A large percentage of cell phone users report a range of uses for their phones in addition to talking, such as taking pictures, texting, and playing games. Less than 10 percent of cell phone users (eight percent) access the Internet with their phones.

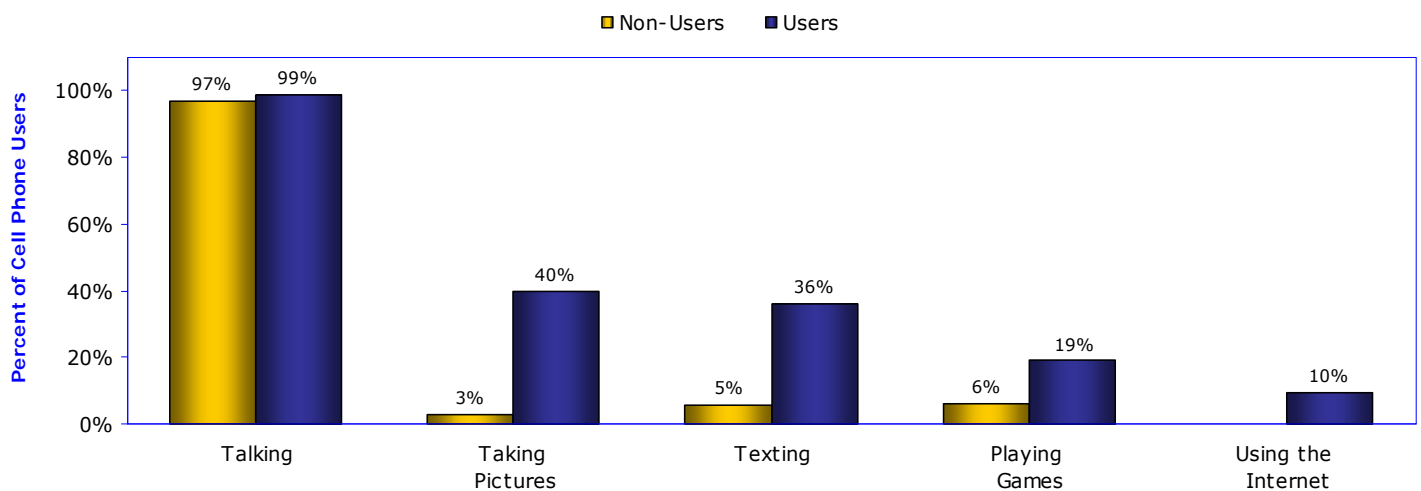
**What Functions Do You Use On Your Cell Phone?
(All Cell Phone Users)**



(Q149 M-1)

Internet users and non-users report significant differences in some uses for their cell phones. Very small percentages of non-users use their cell phones for any other function besides talking.

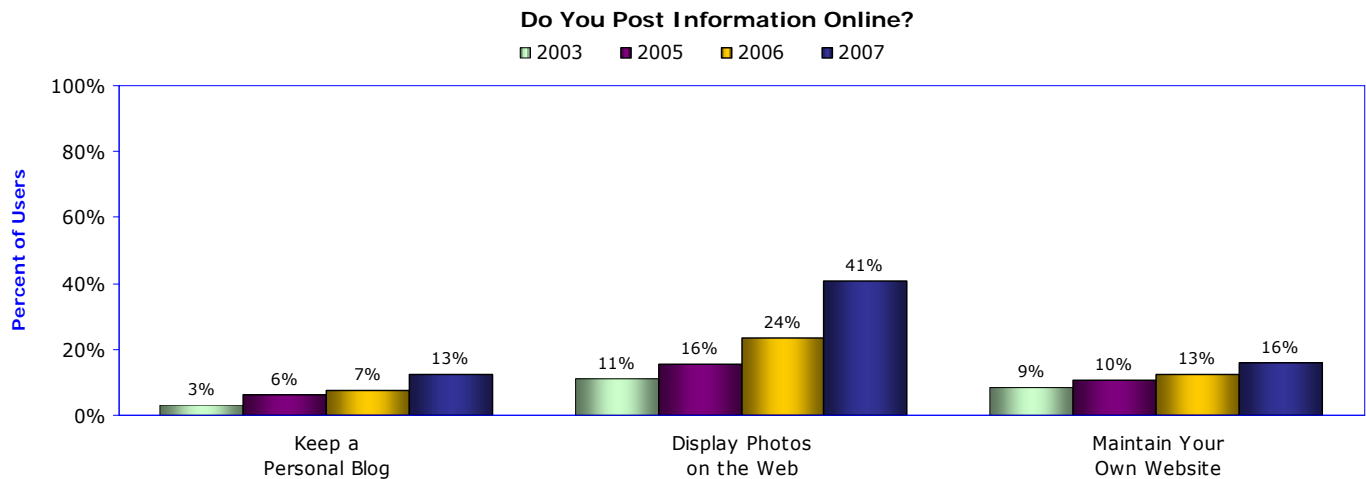
**What Functions Do You Use On Your Cell Phone?
(Internet Non-Users Vs. Users)**



(Q149 M-2)

Posting Information Online

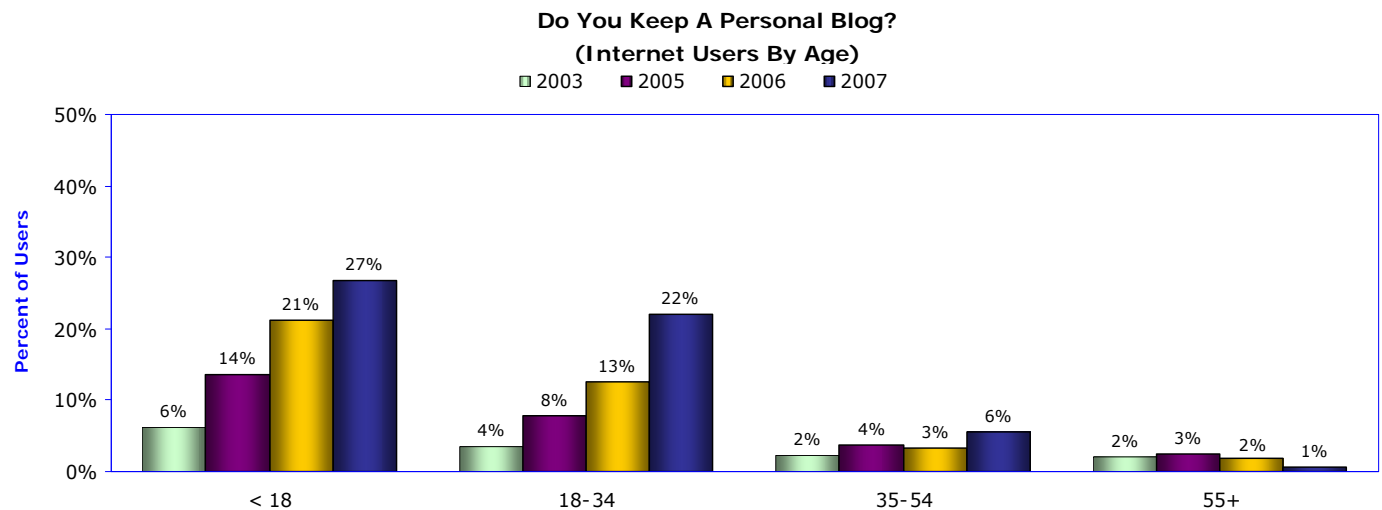
Distributing original content created by Internet users -- whether through a blog, display of photos, or maintaining a personal Web page -- continued to increase. In the current Digital Future Project, 41 percent of Internet users said they post photos online -- an almost fourfold increase in only four years. Smaller but steadily growing percentages of users said they maintain their own Web site or keep a personal blog.



(Q711 M-2)

Posting Information On Personal Blogs (By Age)

While Internet users of all ages post blogs, users under 18 are most likely to post them. Twenty-seven percent of Internet users under 18 maintain a personal blog -- a substantial increase from only six percent in 2003. Even faster growing is the percentage of bloggers who are ages 18-34, which has increased almost sixfold in four years.



(Q711 M-3)

Consumer Behavior

Adult Internet users who buy online **67%**

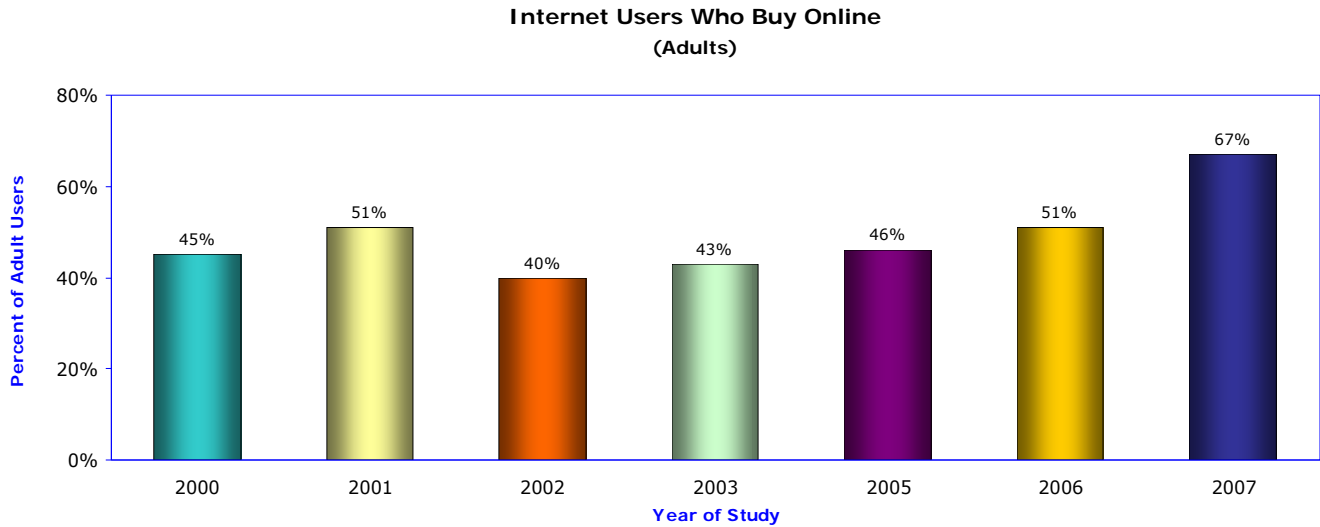
Average online purchases per year **36**

Respondents who are very concerned or extremely concerned about the privacy of personal information when buying online **61%**

Respondents who are very concerned or extremely concerned about the security of credit card information when buying online **57%**

Who Is Buying Online?

The number of online purchasers has increased to the highest level in the history of the Digital Future Project, increasing 16 percent since 2006.

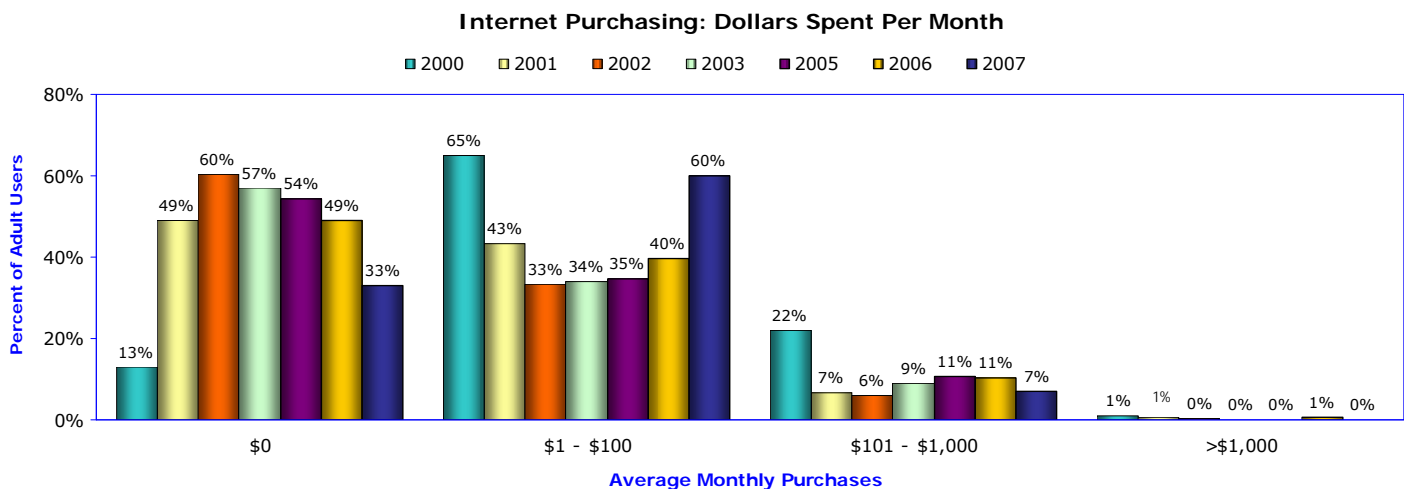


(Q770 M-2)

Purchasing On The Internet: Spending Per Month

Sixty percent of Internet users age 18 and older bought online and spent under \$100 a month, a large increase over 2006.

The percentage who did not buy dropped from almost one-half (49 percent) to one-third of users.

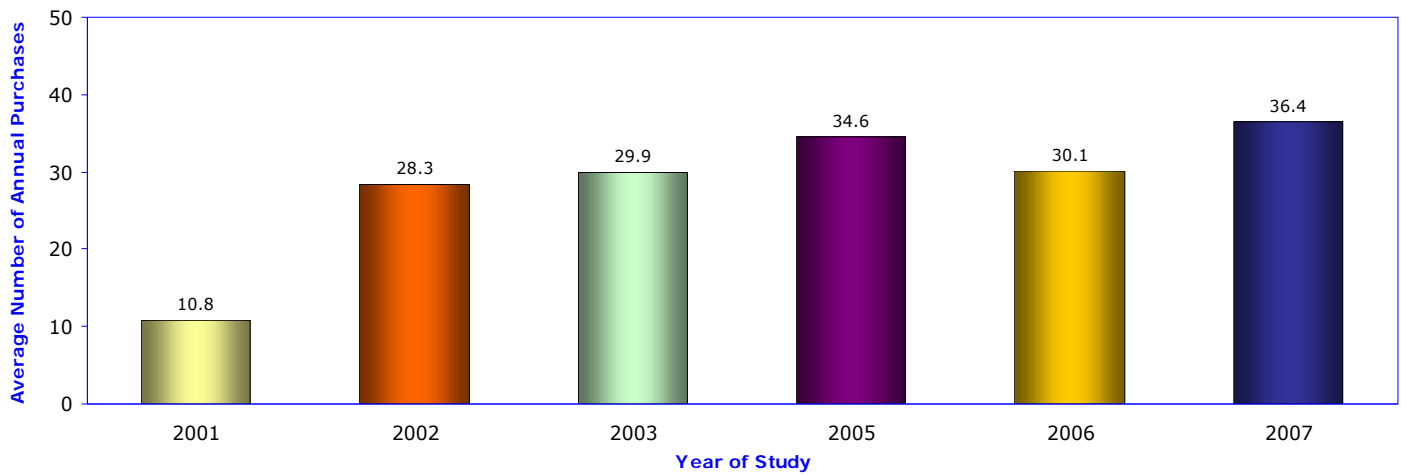


(Q770 M-1)

How Often Do Online Purchasers Buy Online?

The average number of annual online purchases for those age 18 and above increased to its peak thus far in the Digital Future Project -- now more than 36 purchases per year.

Internet Purchasing Frequency Of Adults



(Q780 M-1)

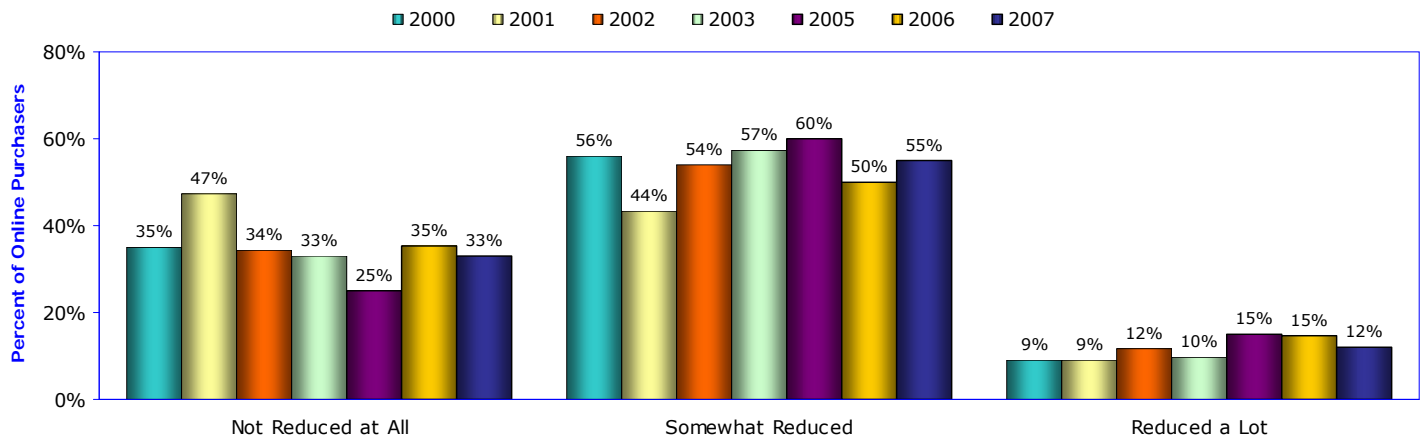
How Does Buying Online Affect Traditional Retail Purchasing?

A large percentage of online purchasers reported that their Web purchases have reduced their buying of similar items in retail stores.

After a small decline in 2006, the percentage who said that Web purchasing reduced their local retail purchasing somewhat or a lot grew to 67 percent of online purchasers, up from 65 percent in 2006.

The percentage who said that their purchasing was not reduced at all declined slightly to one-third of online buyers.

Does Buying Online Affect Purchasing In Traditional Retail Stores?
(Internet Users Who Buy Online)

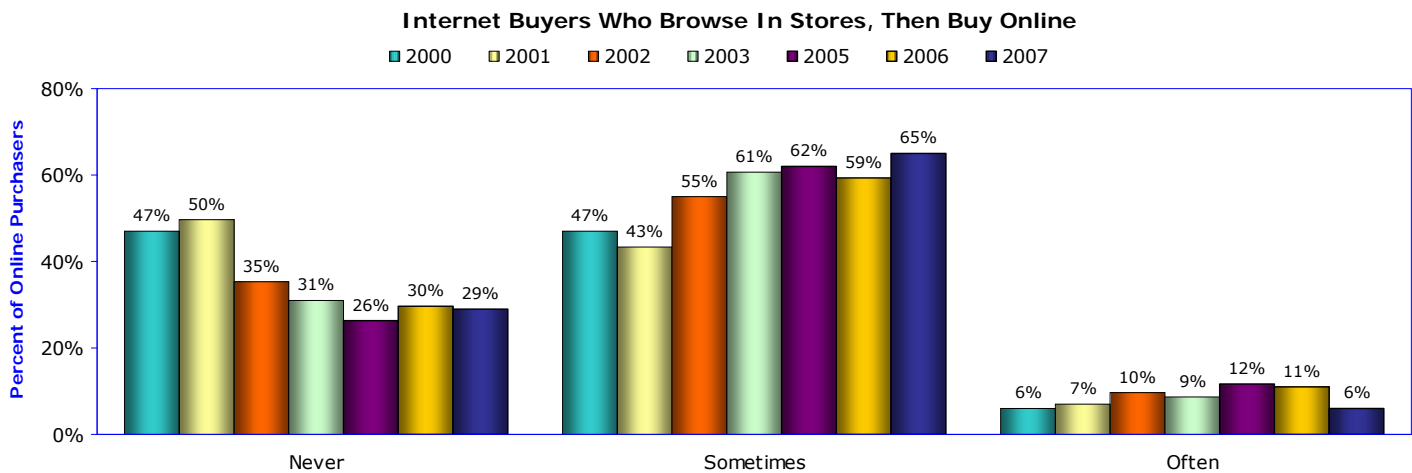


(Q860 M-3)

Browsing For Products: Retail Stores Vs. The Internet

Large percentages of respondents report using both the Internet and retail stores for browsing and purchasing.

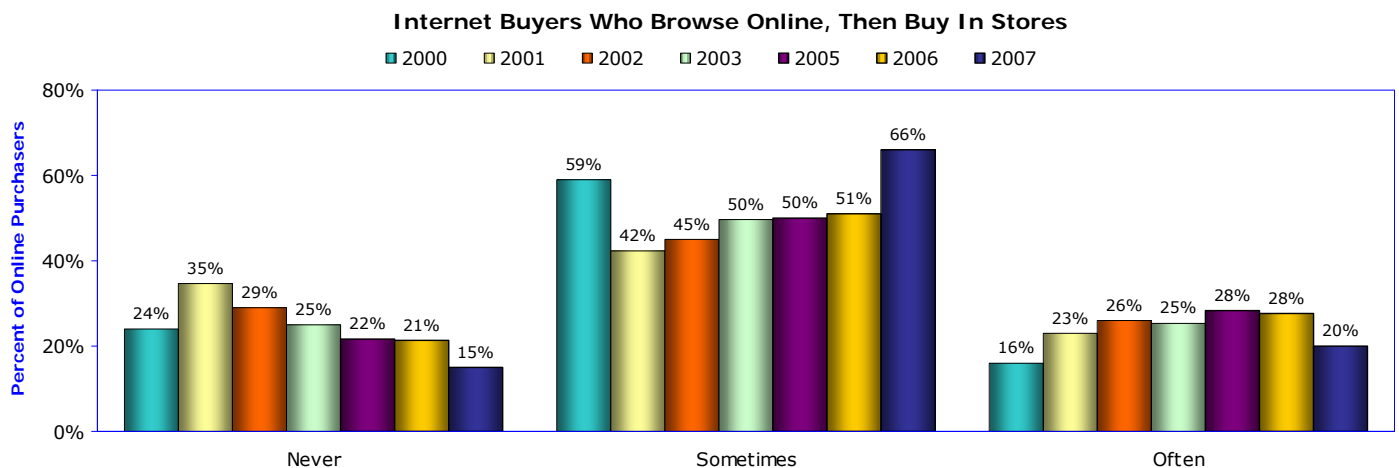
In the current Digital Future Project, 71 percent of Internet purchasers said they sometimes or often browse in traditional retail locations and then buy online – about the same as the 70 percent who reported the same response in 2006.



(Q900 M-3)

As in previous Digital Future studies, even higher percentages of respondents said they use the Internet as a merchandise browsing tool before buying in stores.

In the current Digital Future Project, 86 percent of Internet users said they sometimes or often browse online and then buy in retail stores, up slightly from 79 percent in 2006.



(Q910 M-3)

Privacy: Concerns When Buying Online

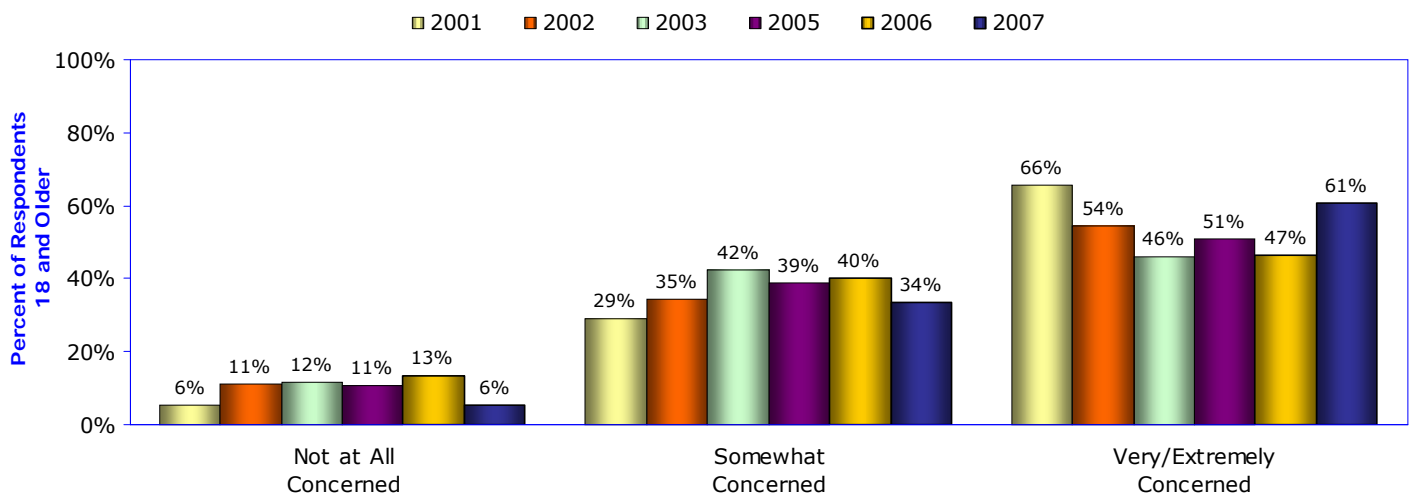
Privacy and security online have been found to be major concerns in each of the seven Digital Future studies. Almost all respondents have reported concerns about the privacy of their personal information when or if they buy on the Internet.

The level of that concern had been generally declining in the first five years of the study, with only a slight increase in 2005. However, the percentage of all respondents who reported the highest level of concern increased in 2007, and overall concern was the highest since the first year of the Digital Future Project.

The total percentage of respondents who reported some level of concern about the privacy of personal information (somewhat, very, or extremely concerned) reached 94.5 percent, the same level as in 2001. Only 5.5 percent of respondents are not at all concerned about the privacy of their personal information.

In the current study, the percentage of respondents who reported that they are very concerned or extremely concerned -- 61 percent -- was higher than any other year since 2001, and a large increase over the 47 percent of respondents who reported concerns at these levels in 2006.

Concerns About Privacy Of Personal Information When Buying Online
(All Respondents, Age 16 Or Older)



(Q840 M-1)

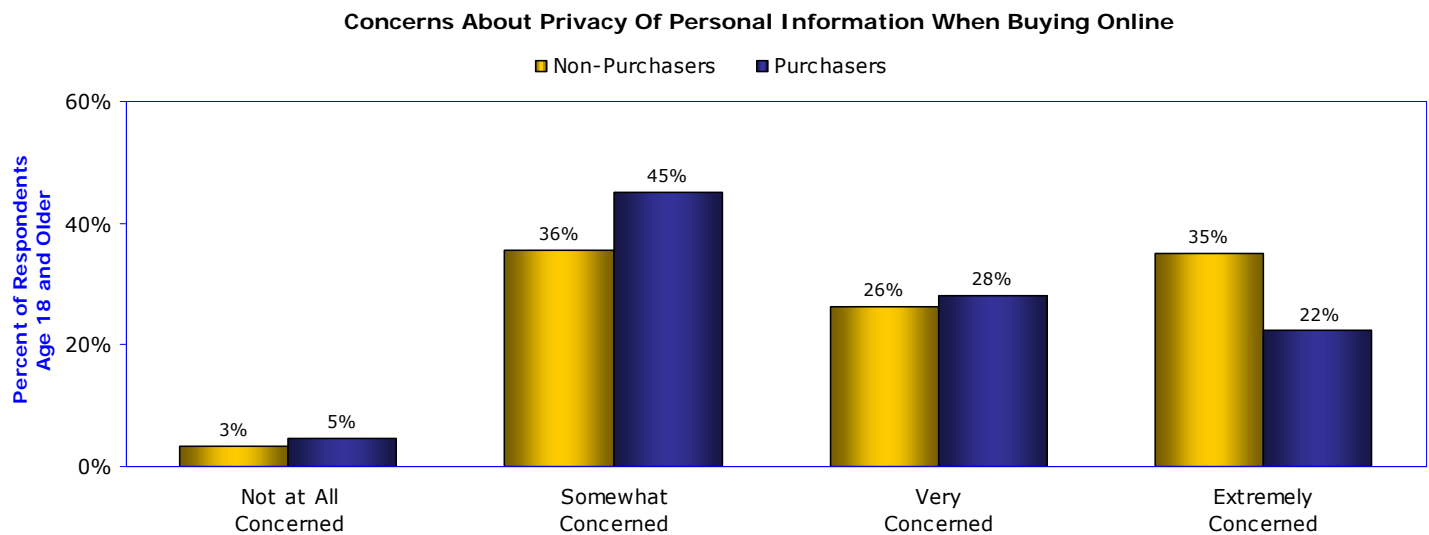
Privacy: Comparing Concerns Among Non-Purchasers Vs. Purchasers

Although the percentage of all users who report the highest level of concern continues to be quite large, comparing Internet purchasers to non-purchasers shows that online buyers report much lower levels of concern.

However, the percentages of both purchasers and non-purchasers who reported the highest levels of concern have increased substantially over 2006.

Half of Internet purchasers (50 percent) report the highest levels of concern about the privacy of their personal information when or if they buy online (very concerned or extremely concerned), compared with 61 percent of non-users who report concerns at the same level.

Five percent of Internet purchasers were not at all concerned about the privacy of their personal information -- a steep drop from the 19 percent who reported no concerns in 2006.

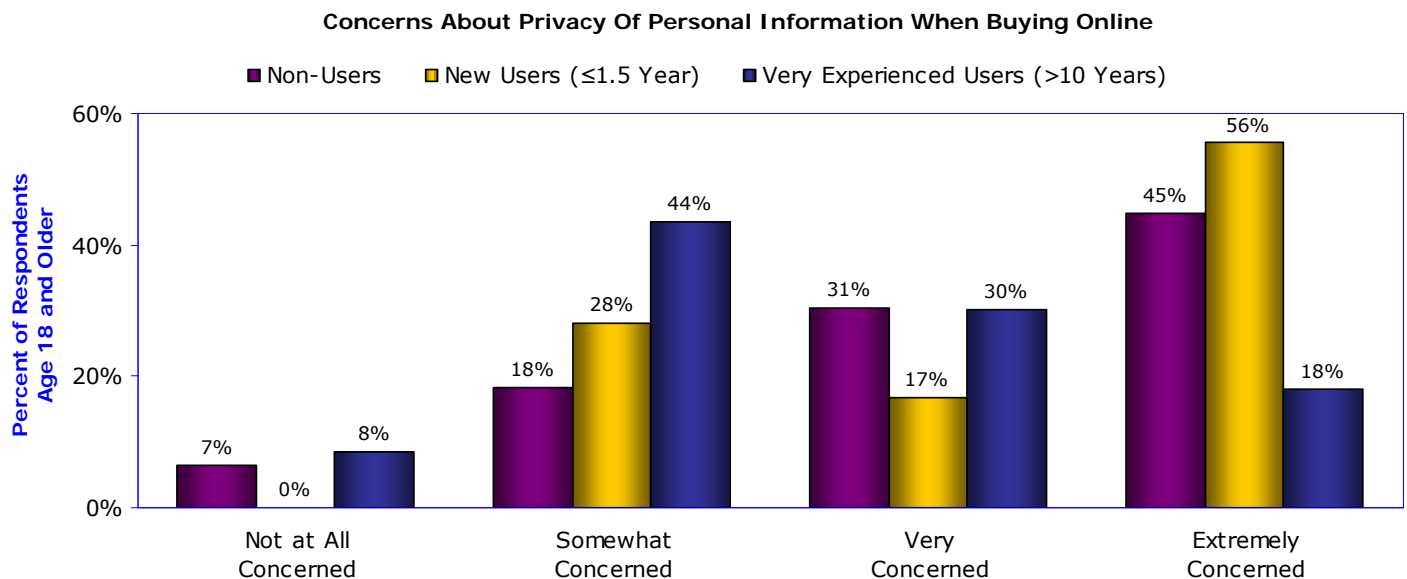


(Q840 M-4)

Privacy: Comparing Concerns Among Non-Users, New Users, Very Experienced Users

Even though concerns about privacy when buying online have increased, a comparison of Internet non-users, new users, and the most experienced users continues to show that their concerns decline as their Internet use increases -- responses that are consistent with the previous Digital Future studies.

In the current study, 48 percent of very experienced users report the highest levels of concern about the privacy of personal information when or if they buy online, compared to 73 percent of new users and 76 percent of non-users.

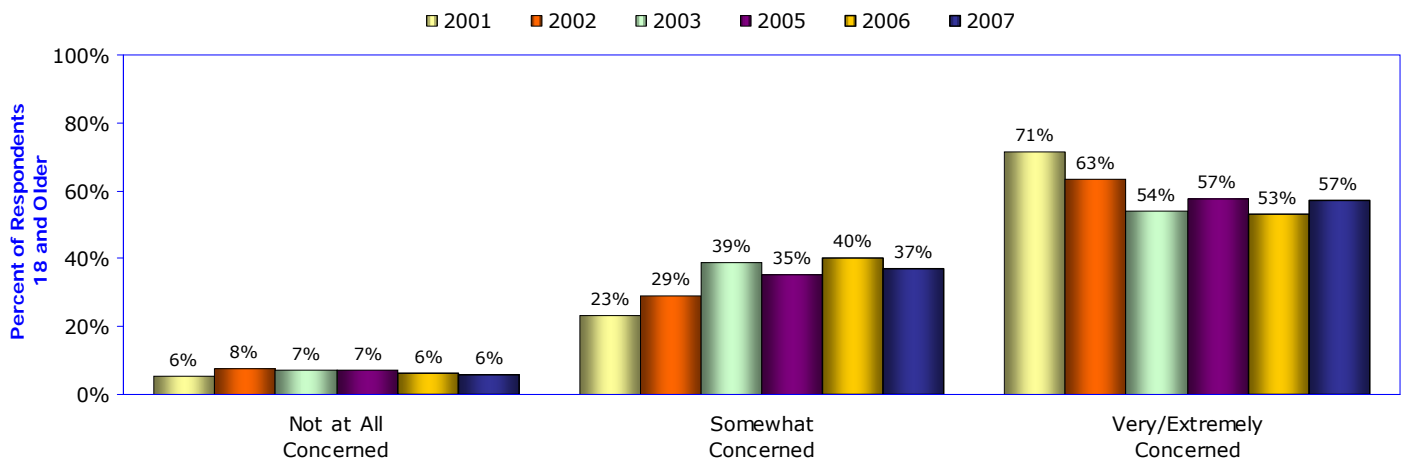


(Q840 M-3)

Credit Card Information: Are Concerns Stabilizing?

Concerns about credit card security when or if buying online continue to remain high among respondents in the Digital Future Project. Although the percentage of those with the highest level of concern about credit card information increased slightly to 57 percent, the overall levels of concern have stabilized over the four most current years of the study -- and at a much lower level than when this issue was first tracked in 2001.

Concerns About Credit Card Security When Or If Buying Online



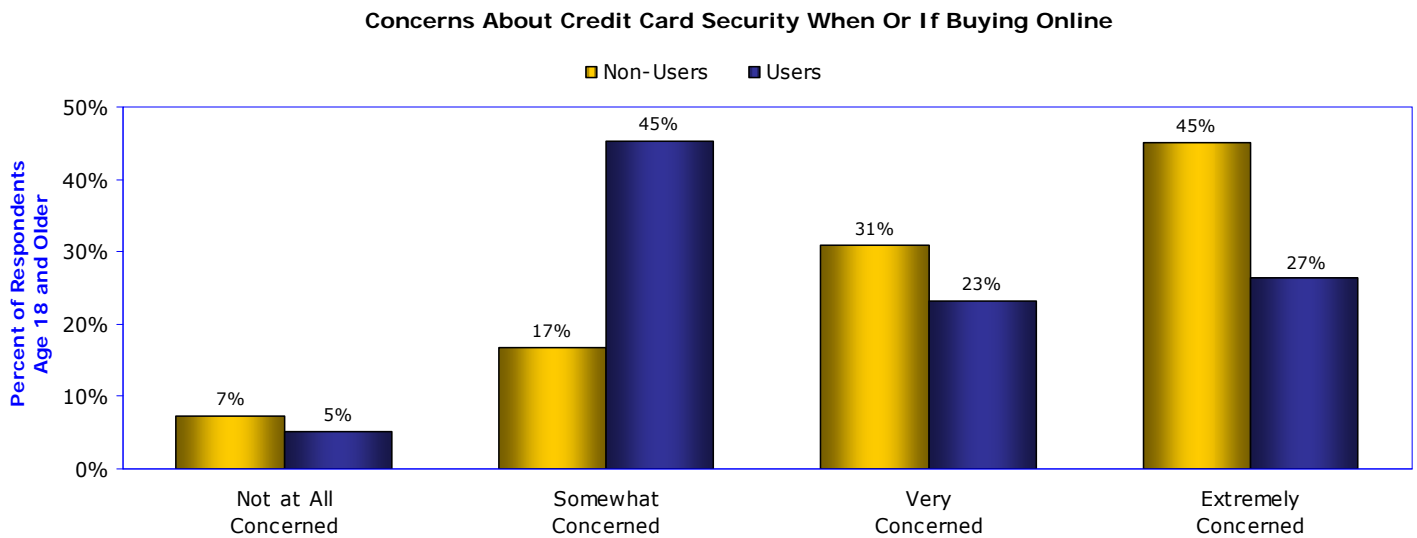
(Q830 M-1)

Credit Card Information: Comparing Concerns Among Users And Non-Users

Much larger percentages of Internet non-users than users continue to report higher levels of concern about credit card security when or if buying online, and their concern has increased.

In the current Digital Future Project, 76 percent of non-users said they are very concerned or extremely concerned about their credit card information when or if buying online, up from 69 percent in 2006.

Among Internet users, 50 percent report the highest levels of concern, up marginally from 49 percent in 2006.



(Q830 M-2)

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

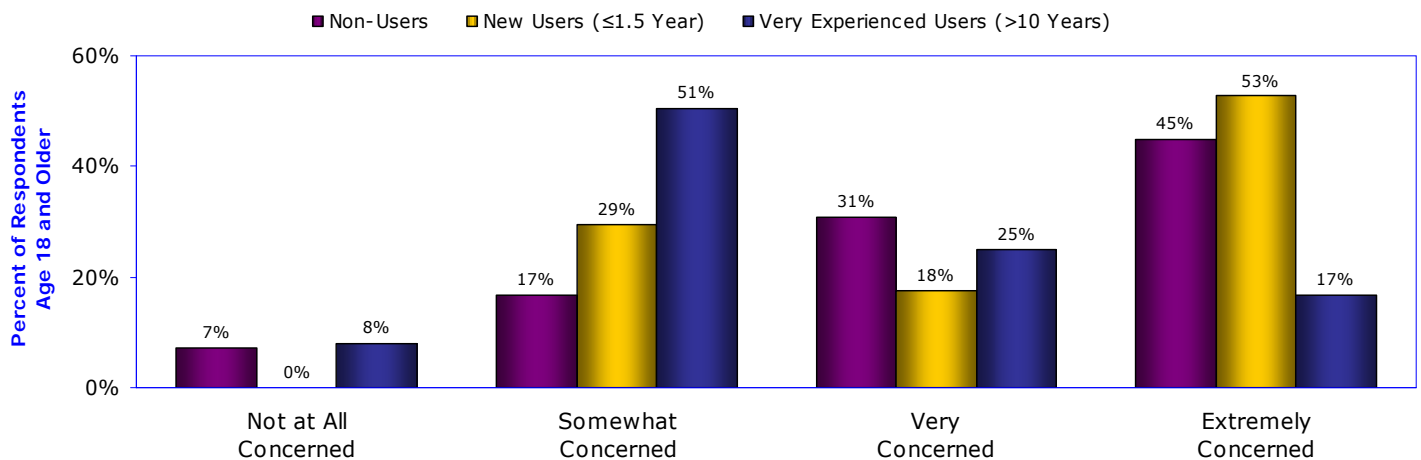
Users with the most online experience report lower levels of concern about credit card information than new users or non-users, but concern among very experienced users is growing.

In the current Digital Future Project, 42 percent of very experienced users said they are very concerned or extremely concerned about credit card security when or if buying online -- up from 38 percent who reported the same response in 2006.

Among new users, 71 percent reported the highest levels of concern -- down from 76 percent in 2006.

Non-users reported the highest percentage of concern, with 76 percent saying they are very concerned or extremely concerned -- up from 69 percent in 2006

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



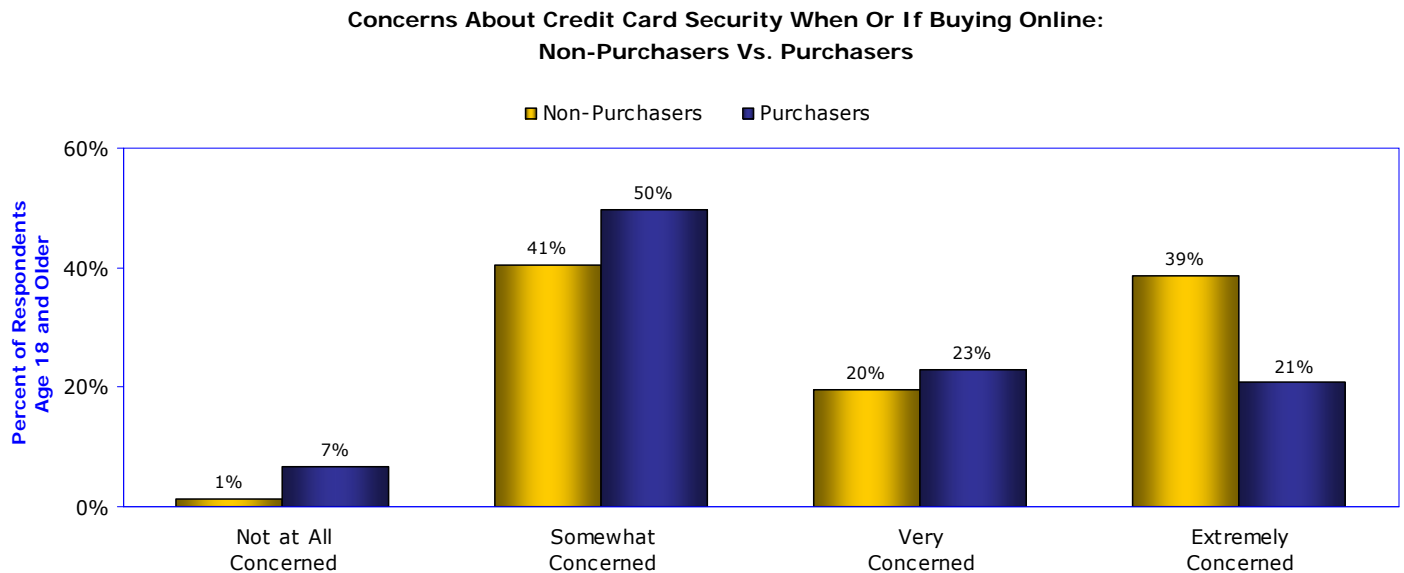
(Q830 M-3)

Credit Card Information: Comparing Concerns Among Non-Purchasers And Purchasers

Comparing concerns about credit cards among online purchasers and non-purchasers continues to show that those concerns are reduced when Internet users begin to buy online. But levels of concern are up among online purchasers and down among non-purchasers.

Of online purchasers, 44 percent said they are very concerned or extremely concerned about credit card security when or if buying online -- this compared to 34 percent in 2006.

Among Internet users who do not buy online, 59 percent reported the same levels of concern, down from 64 percent in 2006.



(Q830 M-4)

Communication Patterns

Internet users with e-mail **99%**

Users who said the Internet is important or very important to maintaining social relationships **45%**

Users who said instant messaging is important or very important to maintaining social relationships **22%**

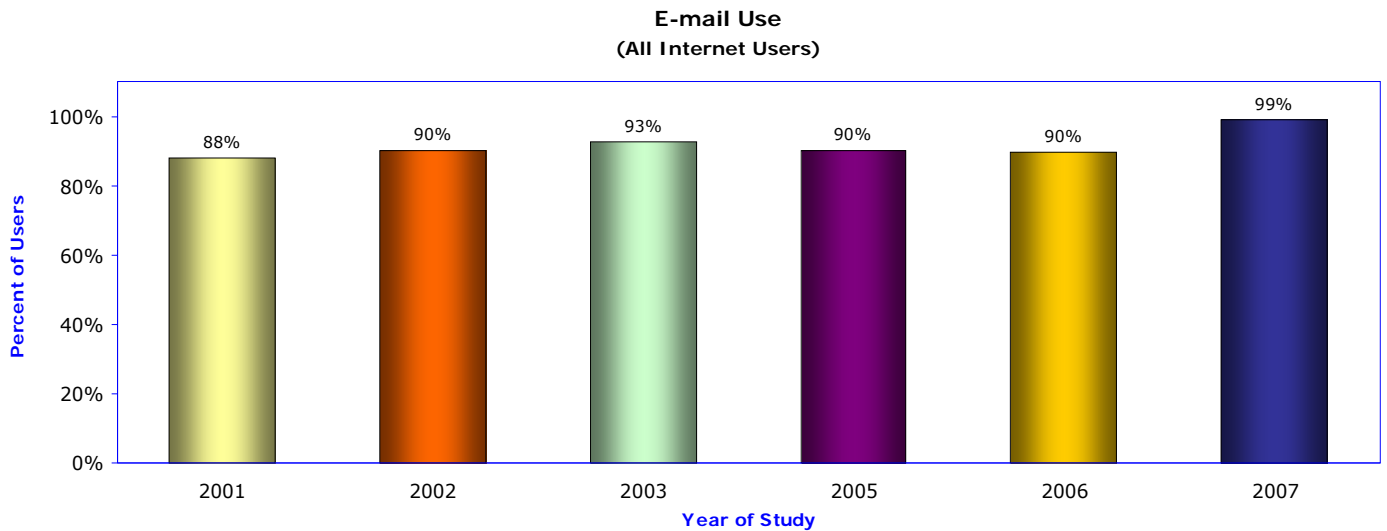
Average number of friends met online but not met in person **5.2**

Average number of friends met in person whom they originally met online **1.6**

Adults who agree that online predators are a threat to the children in their households **53%**

How Many Americans Are Using E-mail?

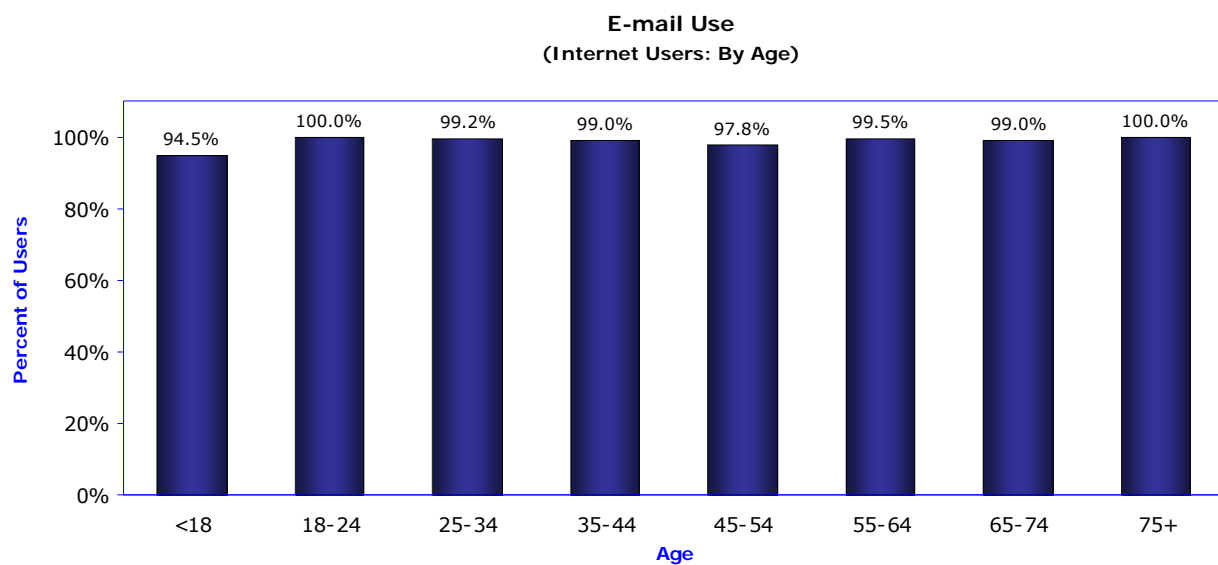
The already high level of e-mail use by Internet users grew even higher. In the current digital future project, 99 percent of Internet users said they use e-mail.



(Q220 JL-1)

E-mail Users: By Age

Given the near-total use of e-mail by Internet users, nearly all users in all age ranges use e-mail. The only modest gaps are among those under 17, and those ages 45-54.

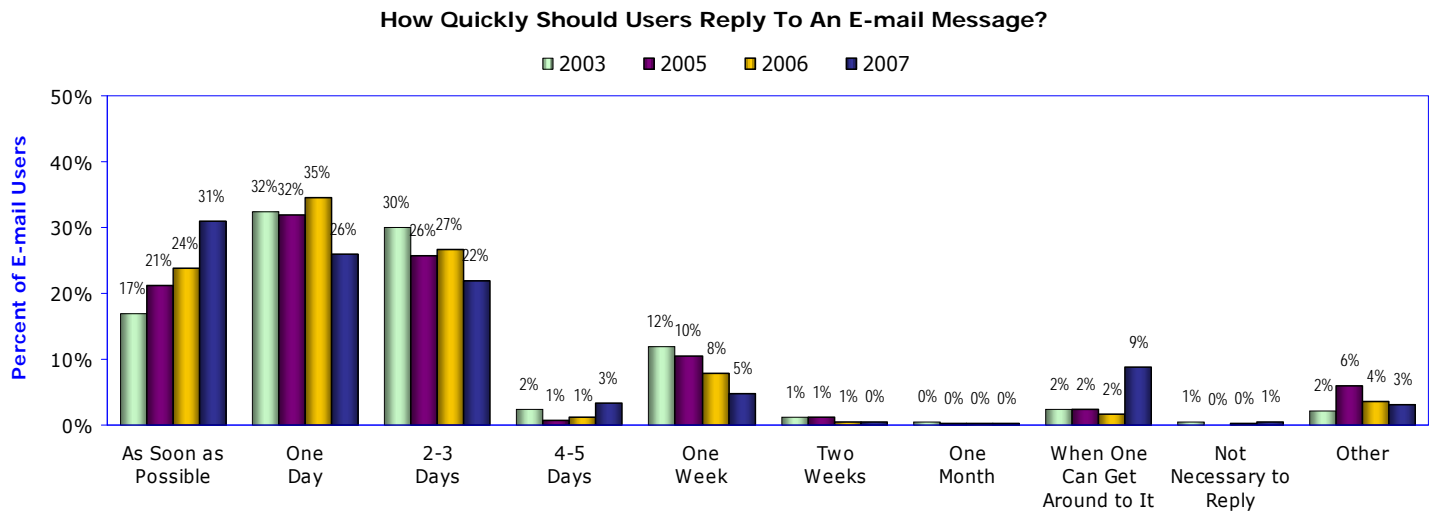


(Q220 JL-2)

How Quickly Should Users Reply To E-mail?

Increasing numbers of e-mail users expect rapid response to e-mail.

Thirty-one percent said that personal e-mail messages should be answered as soon as possible -- up from 24 percent in 2006.



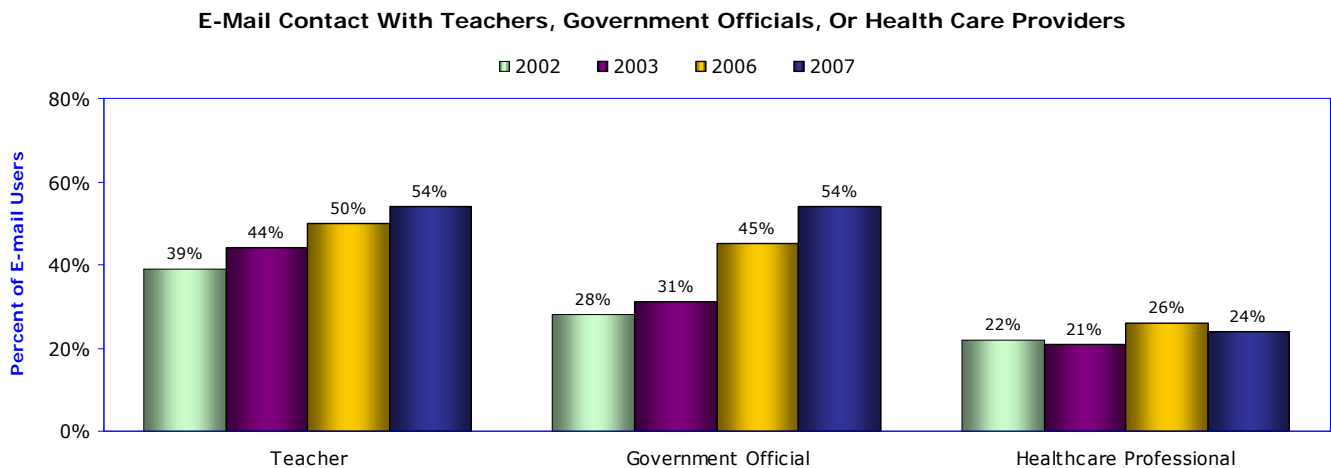
(Q263 M-3)

E-mail Communication With Teachers, Government Officials, And Health Care Professionals

Growing percentages of e-mail users reported that they use e-mail to contact a teacher or government official; more than half of e-mail users (54 percent) have contacted either a teacher or government official.

Growth in contact by e-mail with government officials has grown substantially, almost doubling since 2002.

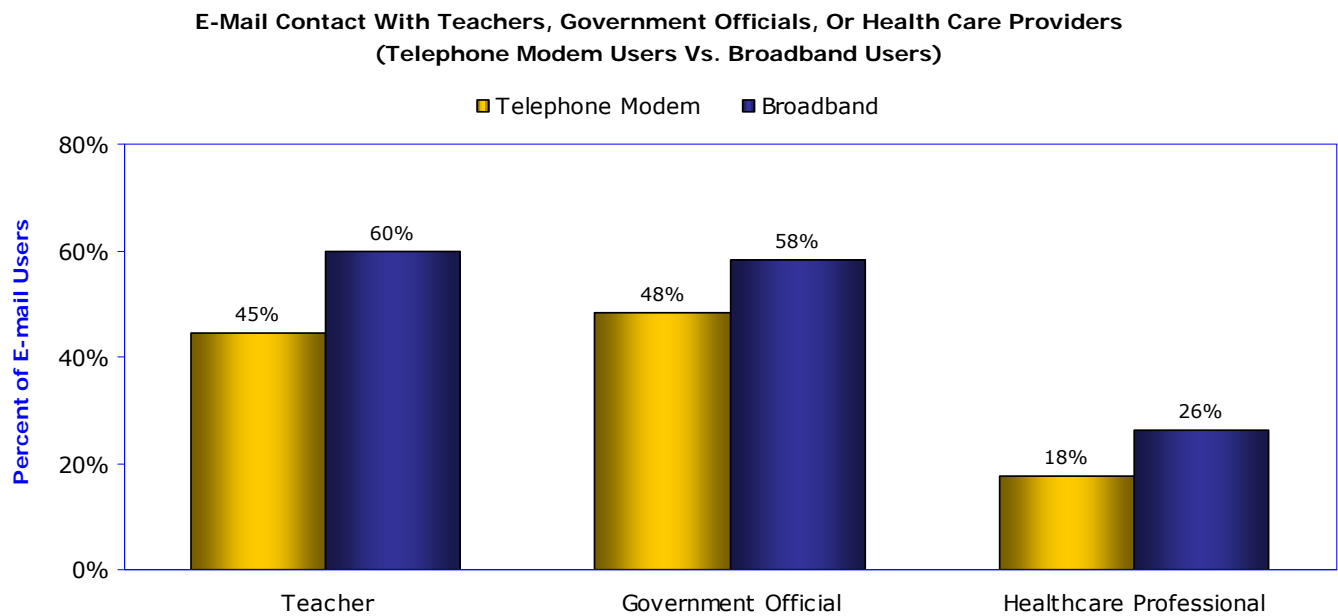
Almost one-quarter (24 percent) have contacted a health care professional by e-mail.



(Q267 M-3)

E-mail Communication With Teachers, Government Officials, And Health Care Professionals: Broadband Users Vs. Telephone Modem Users

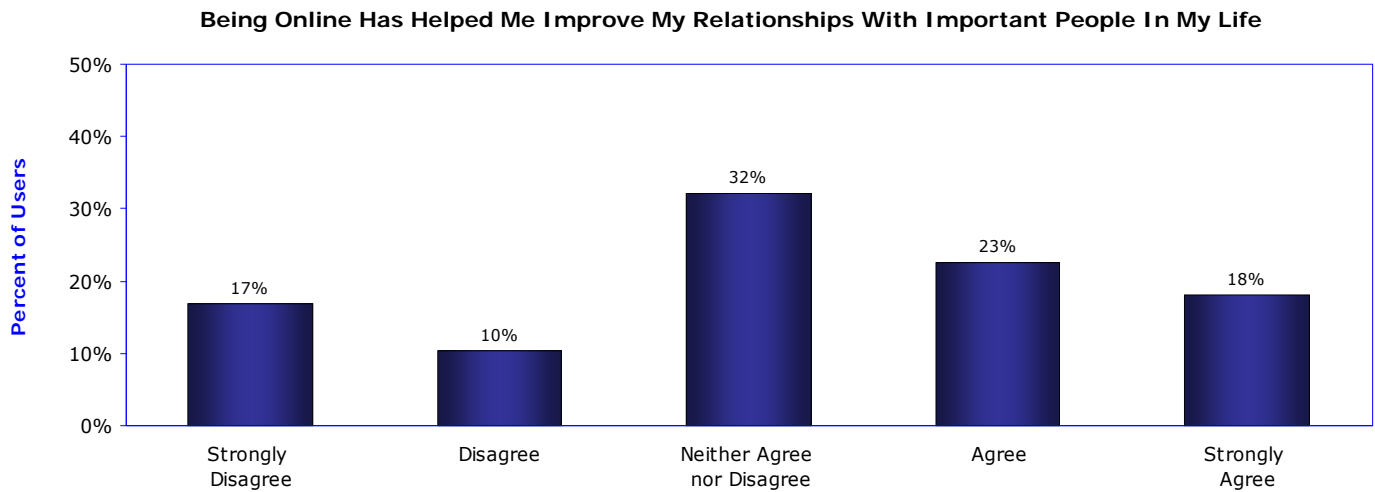
Higher percentages of broadband users than telephone modem users are communicating by e-mail with teachers, government officials, and health care professionals.



(Q267 M-2)

Does The Internet Help Users Improve Their Relationships?

A new question for the Digital Future Project found that 41 percent of Internet users agreed that being online helped them improve their relationships with important people in their lives.

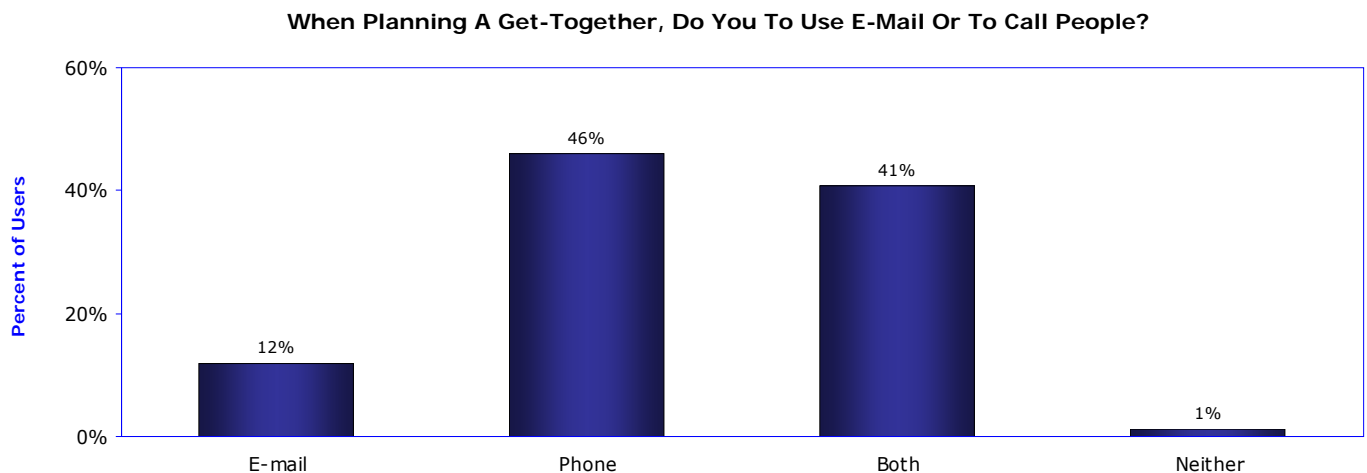


(Q533 M-4)

Planning Social Events: With E-mail or Telephone?

Is e-mail acceptable for contacting people to plan a social gathering?

In a new question for the study, 12 percent of Internet users said that they preferred using e-mail, compared to 46 percent who preferred calling by telephone; 41 percent use both e-mail and the telephone.

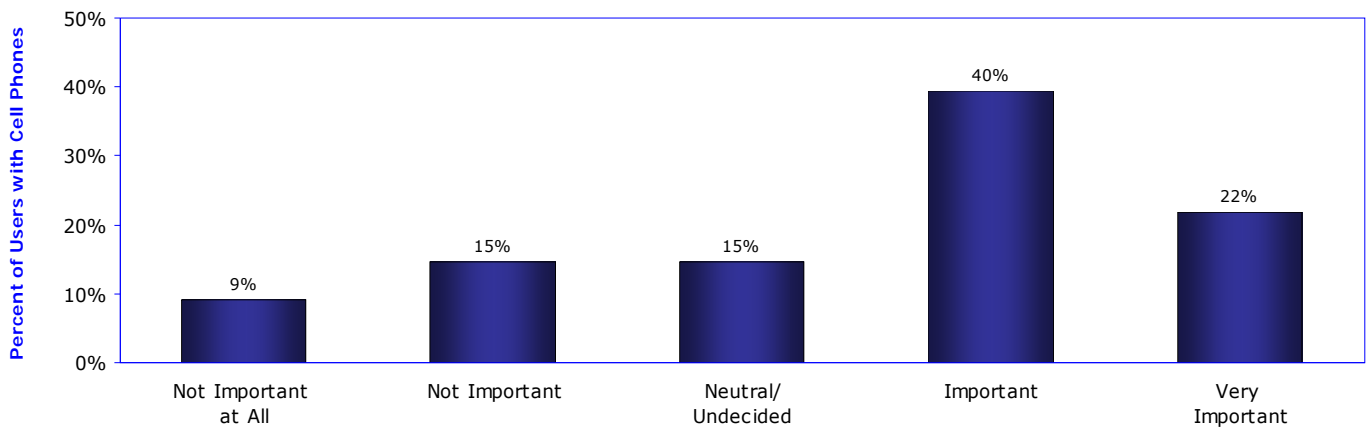


(Q-221 JL-1)

Cell Phones And Social Relationships

A large majority of Internet users with cell phones said their phone helped them to maintain their social relationships. Sixty-two percent of users with cell phones said their phone was important in maintaining their social relationships.

How Important Is The Cell Phone For Helping You Maintain Social Relationships



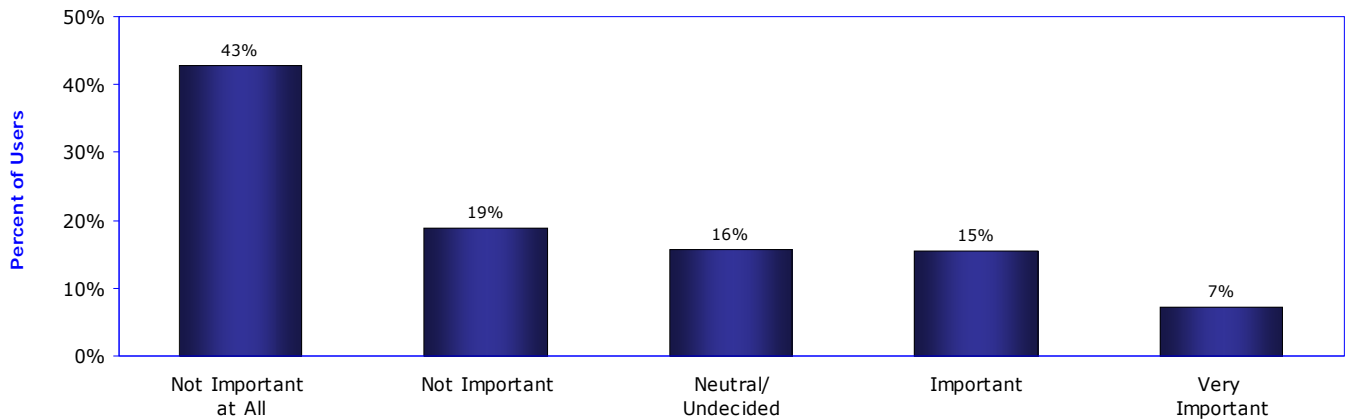
(Q218B JL-2)

Instant Messaging And Social Relationships

Even as use of instant messaging increases, less than one-quarter of Internet users overall said that instant messaging is important in maintaining social relationships.

Among all Internet users, 22 percent said that instant messaging is important or very important for maintaining social relationships, compared with 62 percent who said instant messaging is not important.

How Important Is The Internet For Helping You Maintain Social Relationships



(Q218 C JL-3)

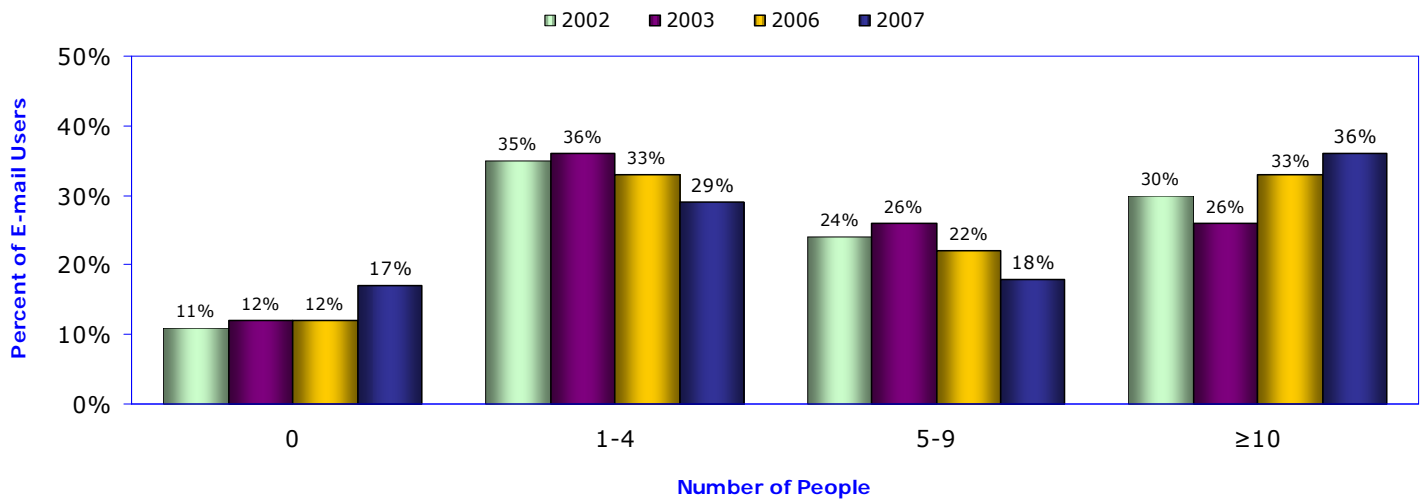
Maintaining Contact By E-Mail

A growing percentage of e-mail users maintain regular personal contact with a large number of people on a weekly basis.

Thirty-six percent of e-mail users maintain regular personal contact with 10 or more people.

At the same time, a growing percentage of e-mail users in the current study -- 17 percent -- said they do not maintain regular personal contact with anyone by e-mail.

**How Many People Do You Maintain Regular Personal Contact With On A Weekly Basis?
(E-Mail Users)**



(Q290 M-5)

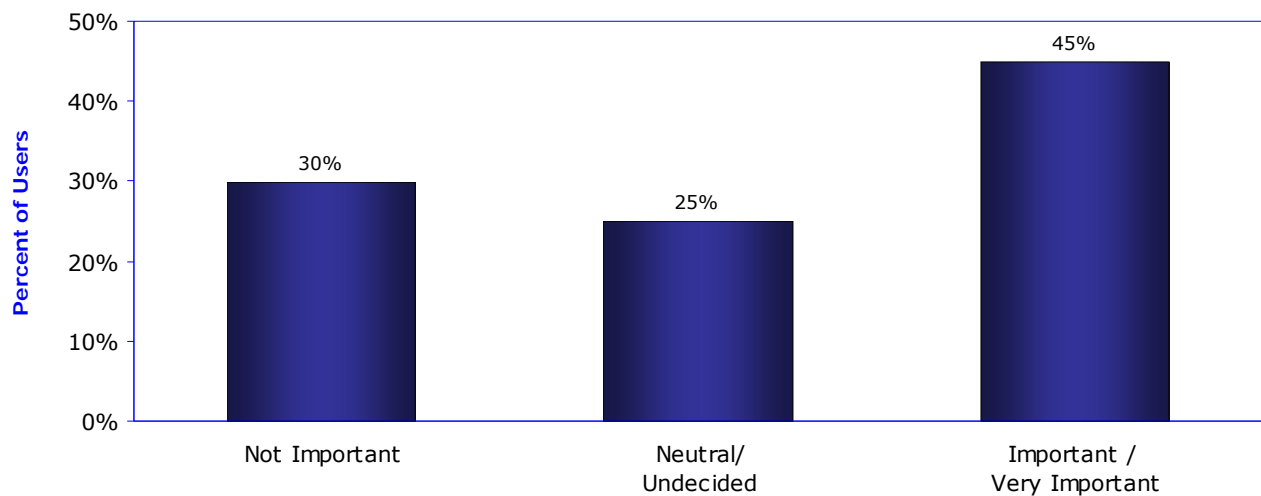
The Internet And Social Relationships

In new questions for the Digital Future Project, users were asked about the importance of the Internet in helping to maintain social relationships.

Overall, 45 percent of users said that the Internet was important or very important in helping them to maintain social relationships.

Thirty percent of users said the Internet is not important in maintaining their social relationships.

**How Important Is The Internet For Helping You Maintain Social Relationships
(Internet Users)**

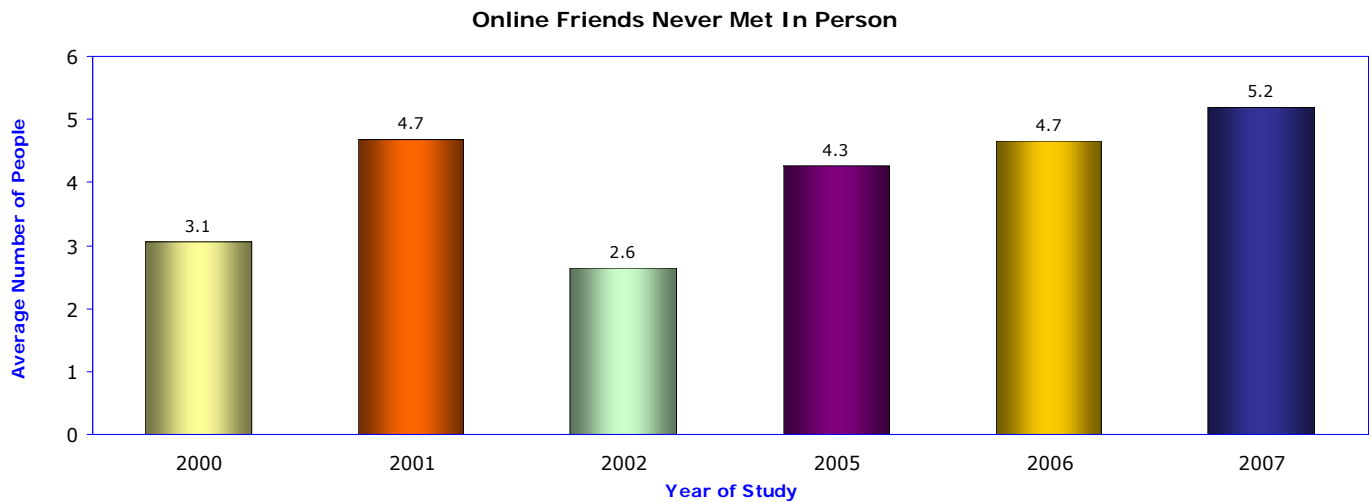


(Q218A JL-1)

The Internet And Online Friends

Internet users report growing numbers of online friends.

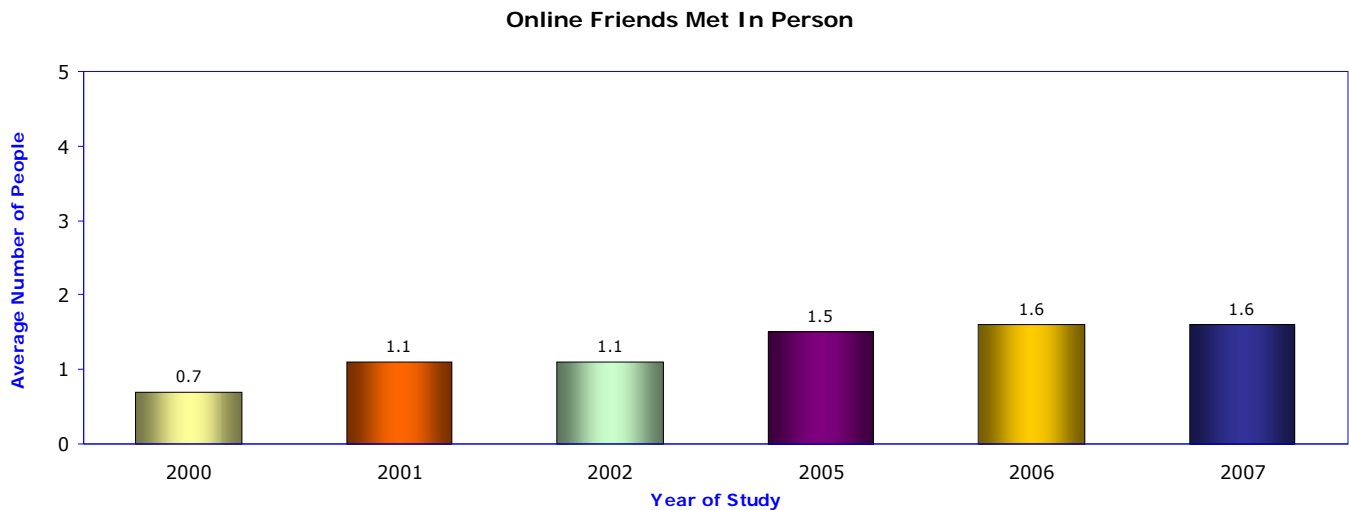
Internet users said they have an average of 5.2 friends online whom they have never met in person, the highest number reported thus far in the Digital Future Project.



(Q330 JC-2)

Friends Met Online, Then Met In Person

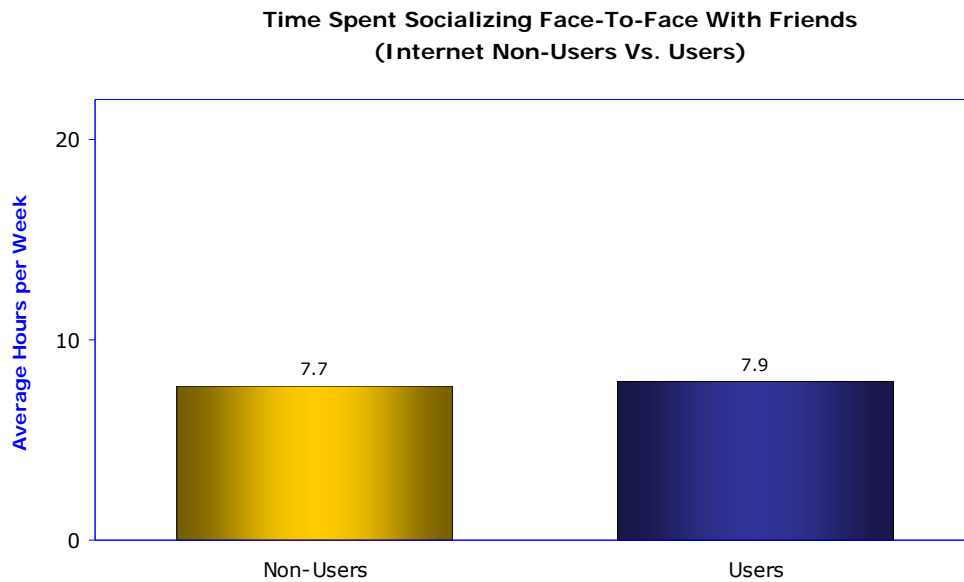
Internet users continue to report meeting a small number of friends in person after initially meeting them online. Users said they met an average of 1.6 friends in person whom they originally met online -- the same number as in 2006.



(Q330 JC-1)

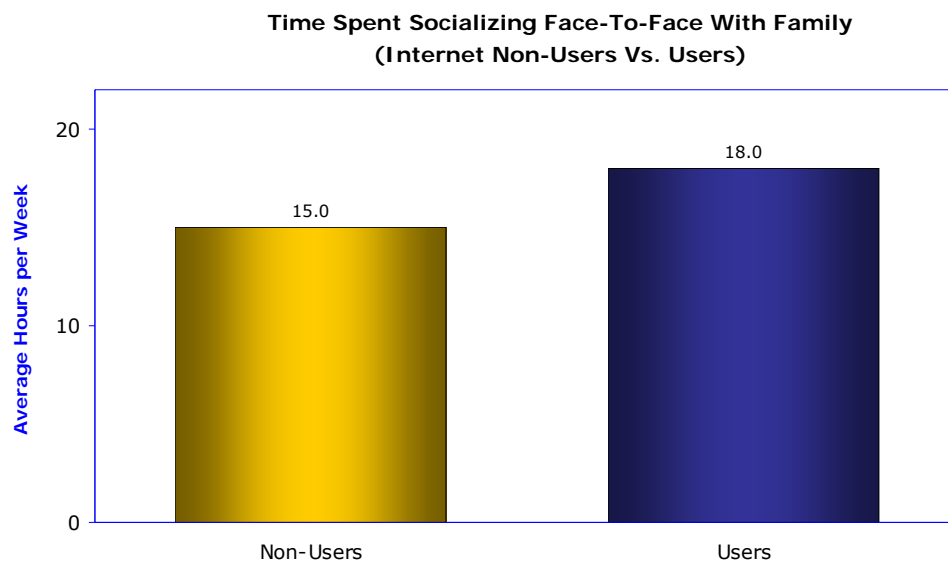
Total Time Spent Socializing With Friends and Family

Internet users report slightly more time per week than non-users socializing with friends in person.



(Q1160 JC-2)

Users also report spending three more hours per week than non-users socializing face-to-face with family.

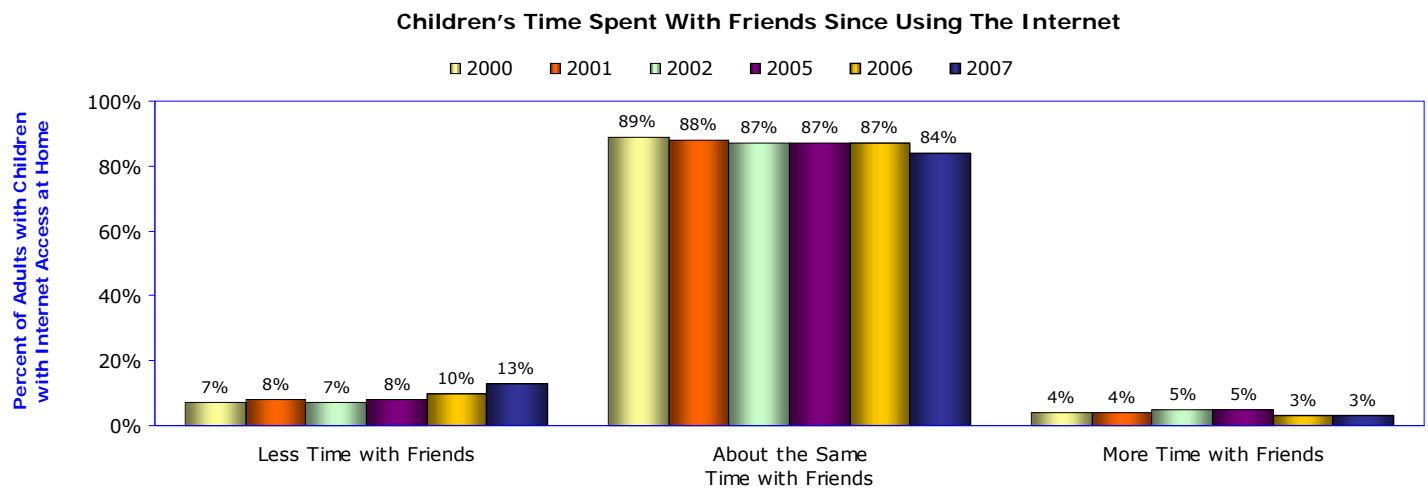


(Q1140 JC-2)

Children And Time Spent With Friends

Large percentages of adults (87 percent) said that the children in their household spend the same amount of time or more time with friends since using the Internet.

However, the percentage of adults who said that their children spend less time with friends increased for the third year in a row, to the highest level in the seven years of the Digital Future Project.



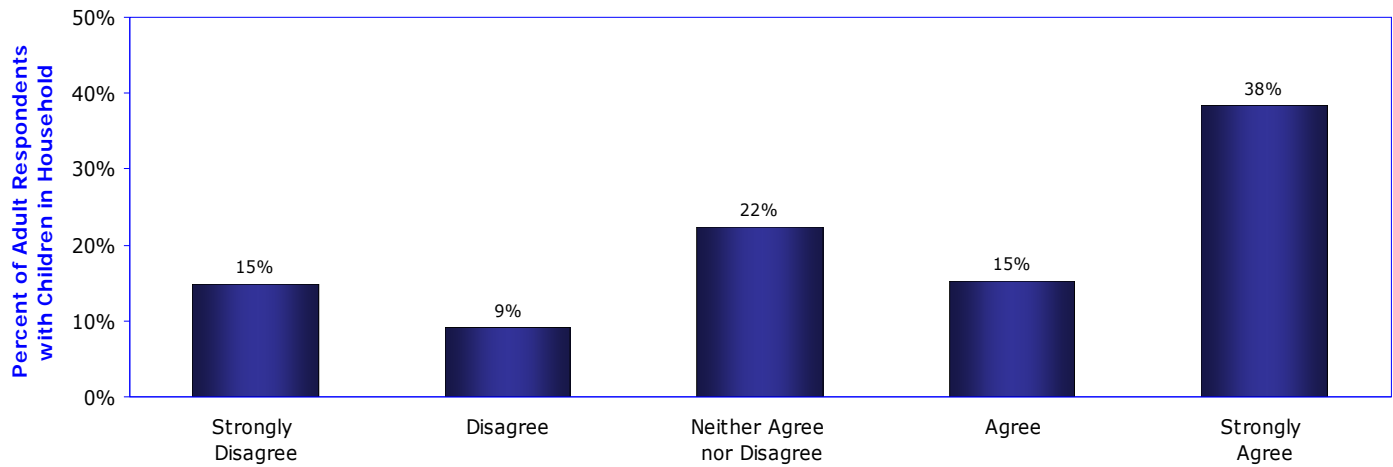
(Q1090 M-2)

Online Predators: Are They A Threat To Children?

A new question for the Digital Future Project found that a large majority of adults said that online predators are a threat to the children in their households.

In households with children, 53 percent of adults agreed that online predators are a threat to their children. Only 24 percent of adults with children in their household disagreed with that statement.

Online Predators Are A Threat To the Children In My Household



(Q533 M-7)

Social Effects: Online Communities

***Length of membership
in an online community
(average)*** **3 years**

***Online community members
who log in to their community
at least once a day*** **54%**

***Online community members
who take offline actions related
to their online communities
at least monthly*** **27%**

***Online community members
who meet members of their
online community in person*** **56%**

***Adults who agree that they
are comfortable with the children
in their households participating
in online communities*** **15%**

***Users who say they feel as
strongly about their online
communities as they do
about their real world
communities*** **55%**

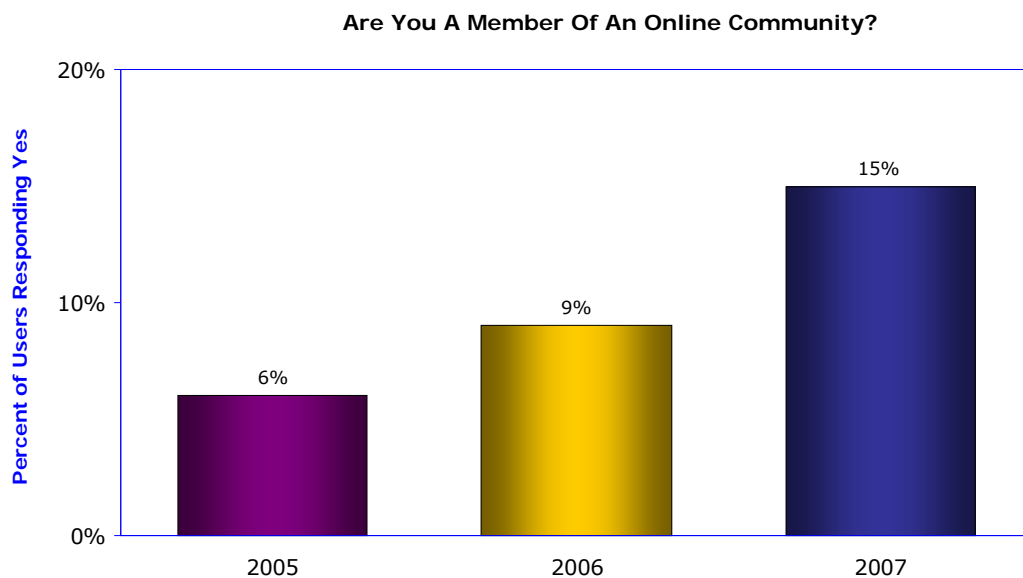
Online Communities

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

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

Are You A Member Of An Online Community?

Fifteen percent of Internet users reported that they are members of an online community -- a percentage that has more than doubled since this question was first asked in the Digital Future Project three years ago. *(This percentage does not include participants in social networking sites, such as Facebook and MySpace.)*

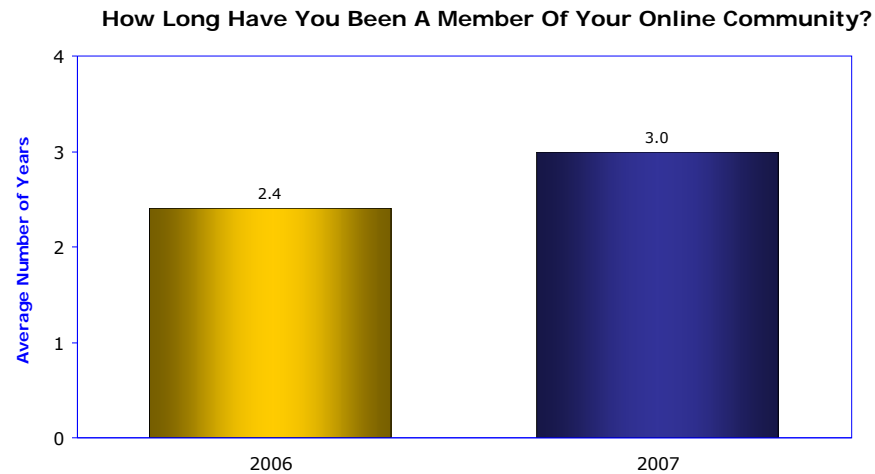


(Does not include social networking sites)

(Q1202 H-2)

Membership In Online Communities: How Long?

Online community members reported increasing average time as members of those communities compared to 2006.



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

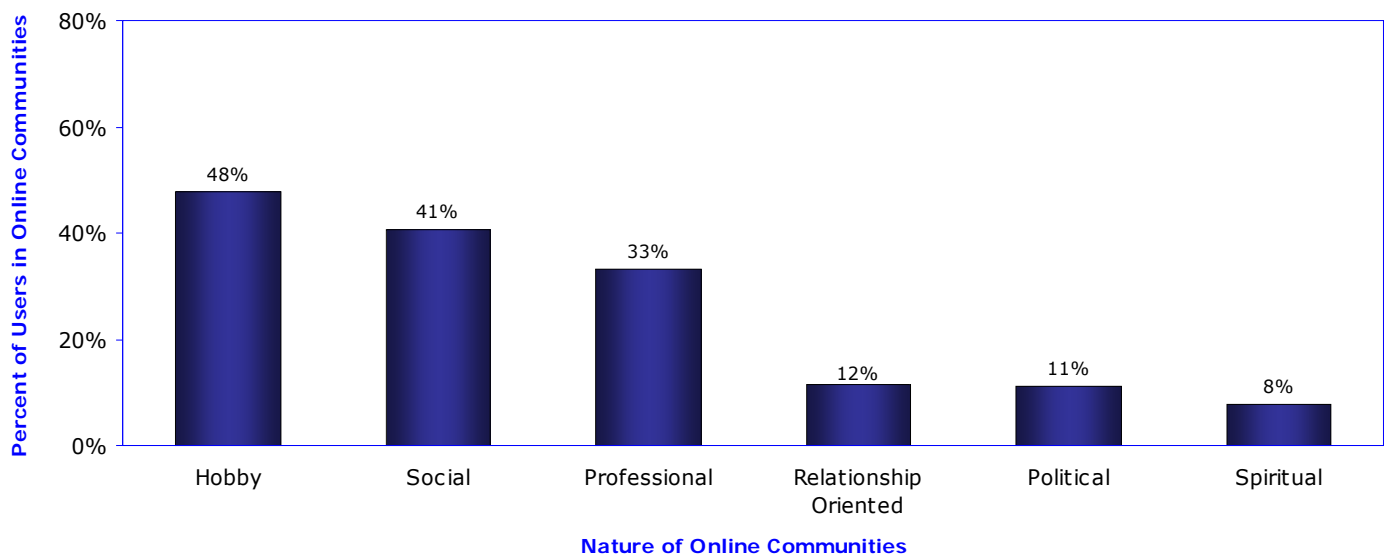
(Q1203A H-1)

Types of Online Communities

Nearly half of online community members (48 percent) said their community is related to their hobbies.

Large percentages of members report that their community involves their social lives (41 percent) or professional issues (33 percent).

What Is The Nature Of Your Online Community?

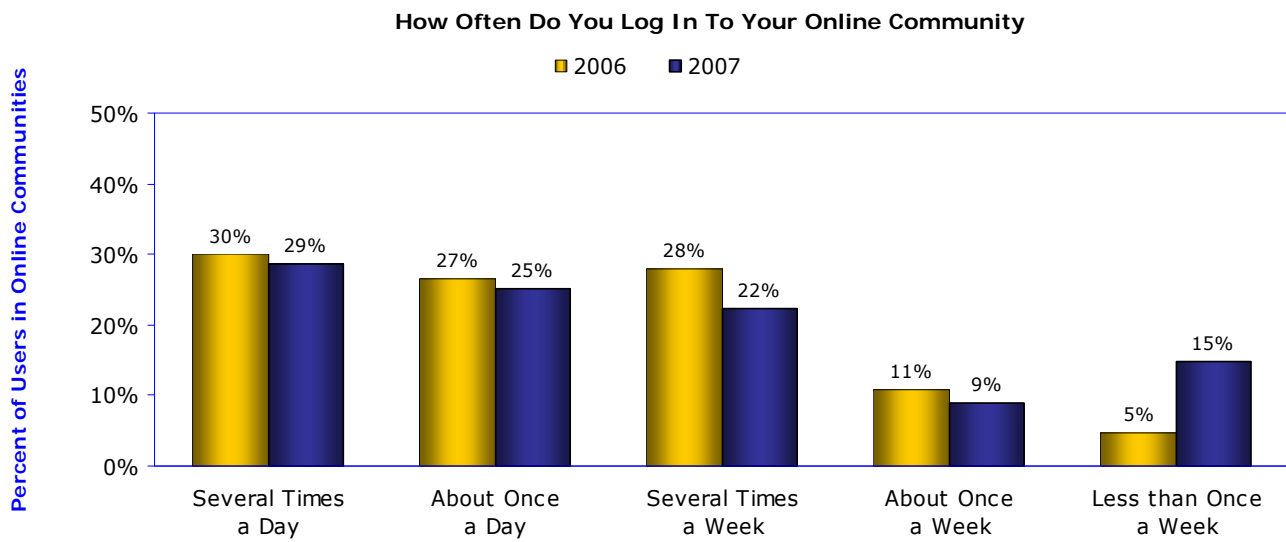


(Q1202A H-1)

Online Community Members: How Often Do They Log In?

Fewer members of online communities in the current study log into their community at least once a day (54 percent) compared to 2006 (57 percent).

A much higher percentage logged in less than once a week (15 percent).



(Q1204 H-2)

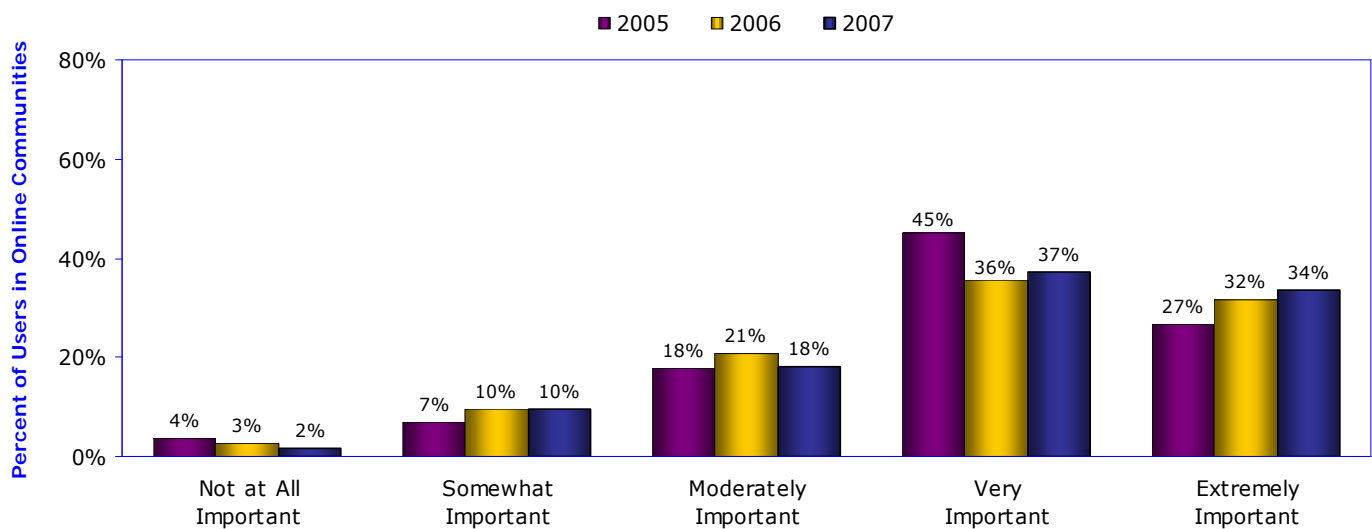
Online Communities: Are They Useful And Important?

Large and growing percentages of members of online communities said their online community is important to them.

In the current study, 71 percent of members of online communities said their community is very important or extremely important to them -- up from 68 percent in 2006.

The highest percentage in the survey thus far report that their online community is “extremely important” (34 percent).

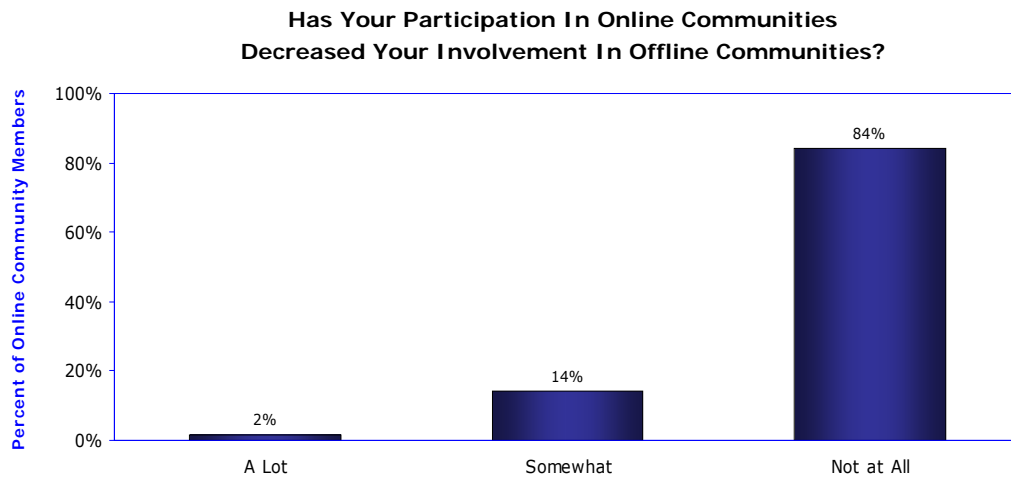
How Useful And Important Is Your Online Community (Or Communities) To You?



(Q1202B H-2)

Participation In Online Communities: Does It Affect Involvement in Real-World Communities?

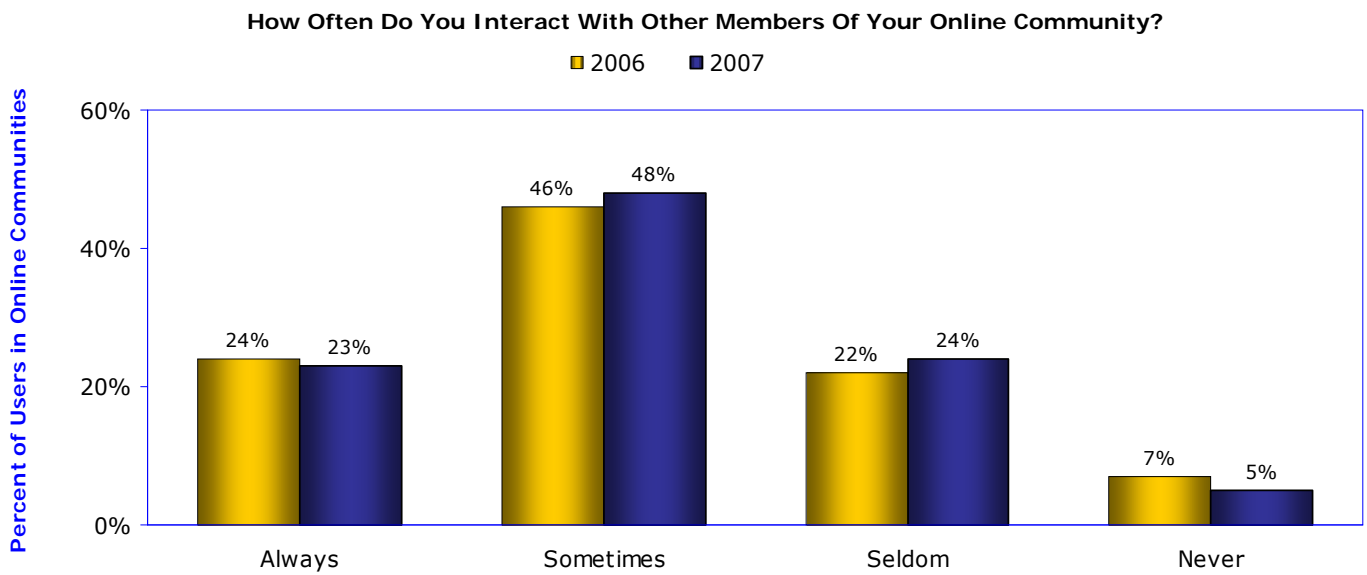
A large percentage of online community members said that their participation in those communities has no effect on their involvement in offline communities. However, 16 percent of online community members said that this involvement decreased their involvement in offline communities.



(Q1208B H-1)

Online Community Members: Interaction

Seventy-one percent of online community members said they sometimes or always interact with other members of their community while logged in, up marginally from 70 percent in 2006.

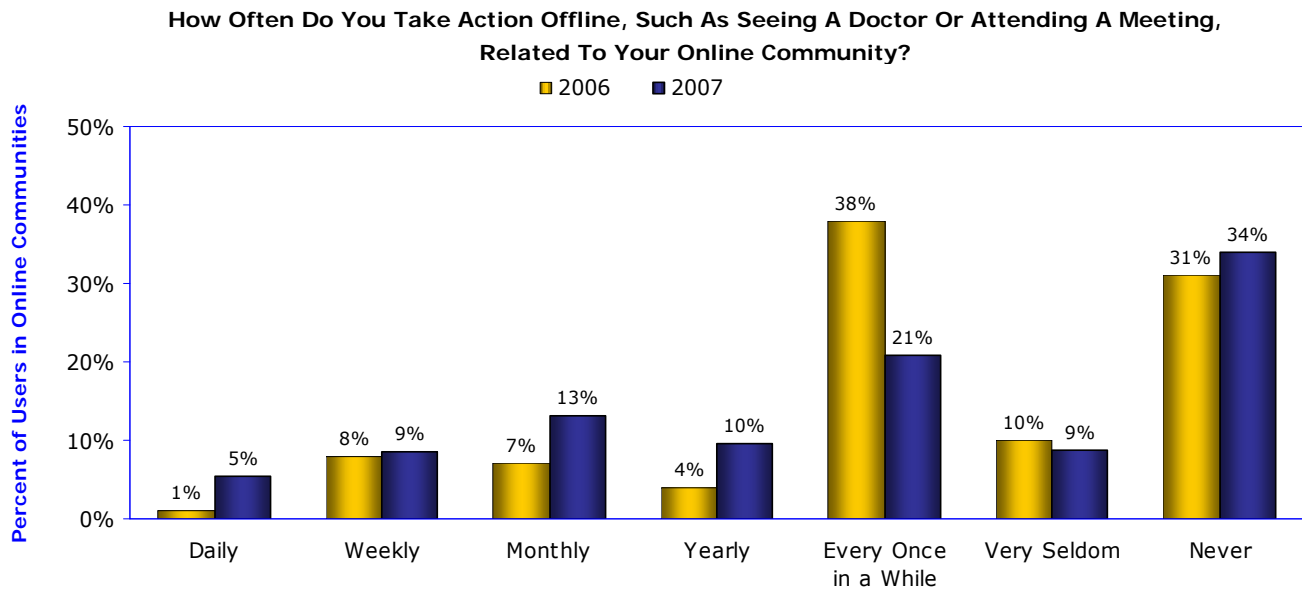


(Q1206 H-2)

Online Communities: Links To Offline Actions

A large increase in the percentage of online community members take actions offline at least once a year that are related to their online community, such as seeing a doctor or attending a meeting.

Fourteen percent of online community members take these actions at least weekly, compared to 9 percent in 2006.

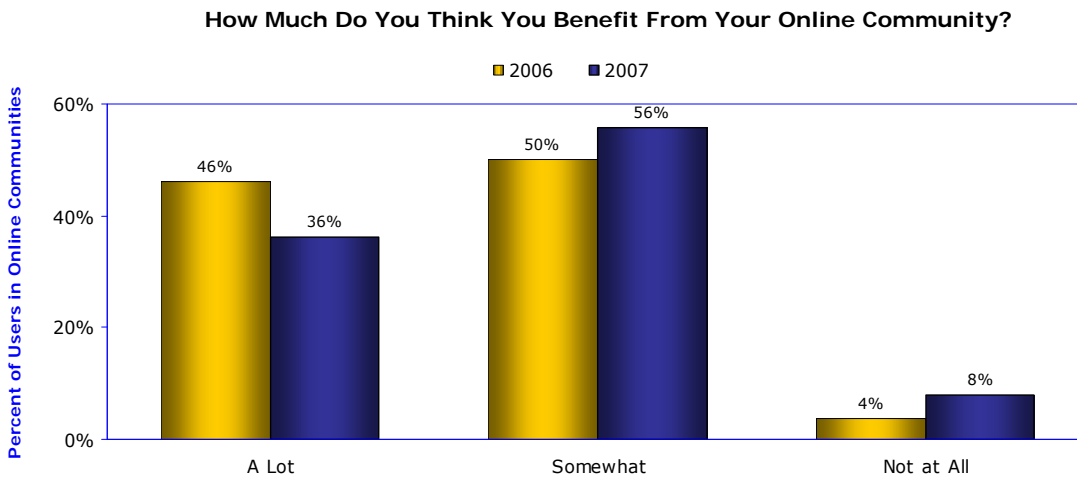


(Q1209A H-1)

Online Communities: Do They Provide Benefits For Members?

Although large percentages of members of online communities (92 percent) reported that they find benefit in their communities, the percentage that finds a lot of benefit declined.

Thirty-six percent of members of online communities said they benefit a lot from their community, down from 46 percent in 2006. The percentage of members who find no benefit in their online community increased to eight percent.

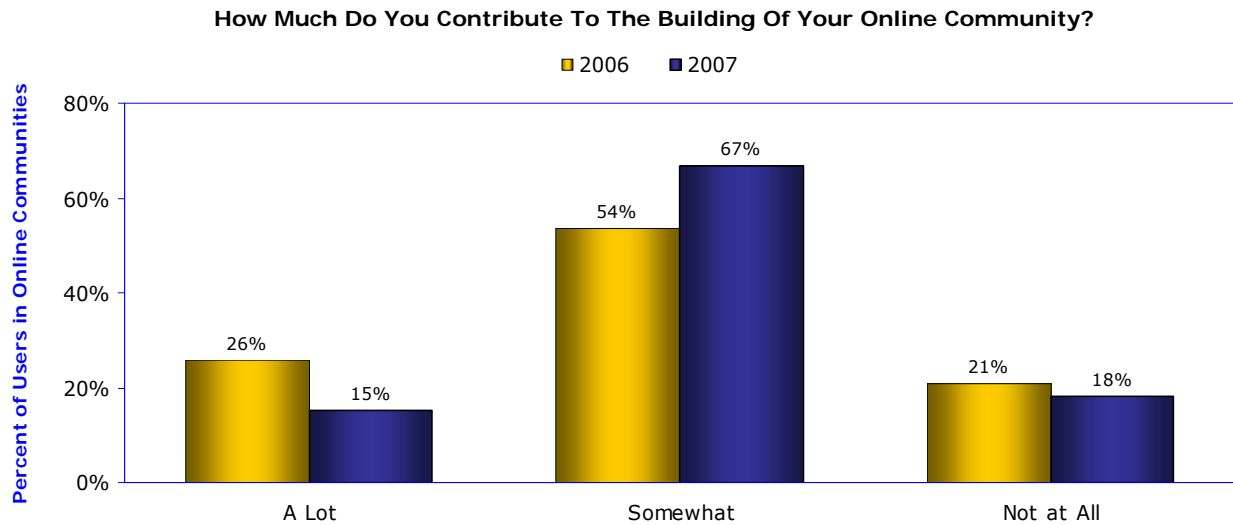


(Q1209B H-2)

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

Large percentages of online community members consider themselves builders of their Internet communities.

Eighty-two percent of online community members said they contribute to the building of that community. A declining number (18 percent) said that they do not contribute at all.

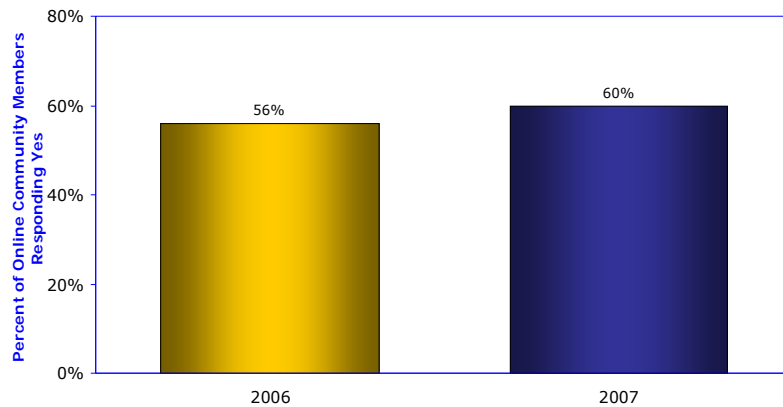


(Q1209D H-1)

Online Communities: Member Interaction

A large and growing percentage of online community members (60 percent) said they usually interact with a particular member or group of members when they are logged into their online community.

**Do You Usually Interact With A Particular Member Or Group Of Members
When You Are Logged Into Your Online Community?**

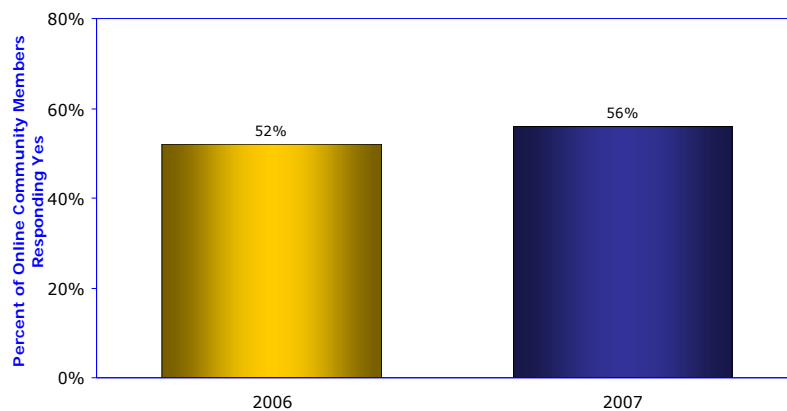


(Q1207 H-2)

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

In addition to high levels of interaction with specific members of online communities, a growing majority of online community members meet their counterparts in person.

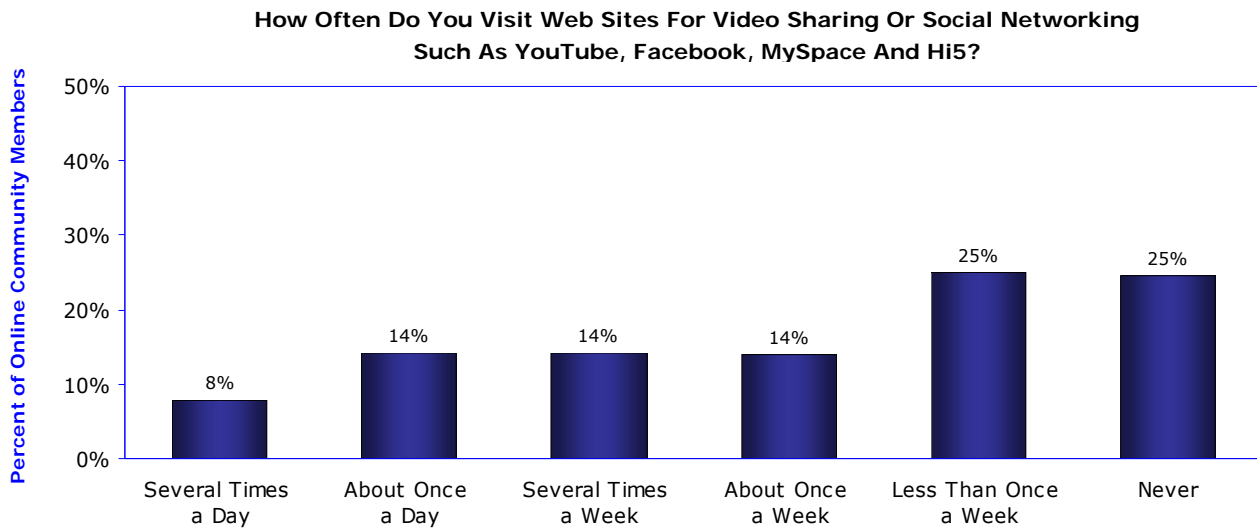
Do You Meet Members Of Your Online Community In Person



(Q1208A H-2)

Web Sites For Video Sharing Or Social Networking: How Often Do You Visit?

While one-fourth of online community members never visit video sharing or social networking sites such as YouTube or Facebook, half of them visit once a week or more, and 22 percent visit at least once a day.



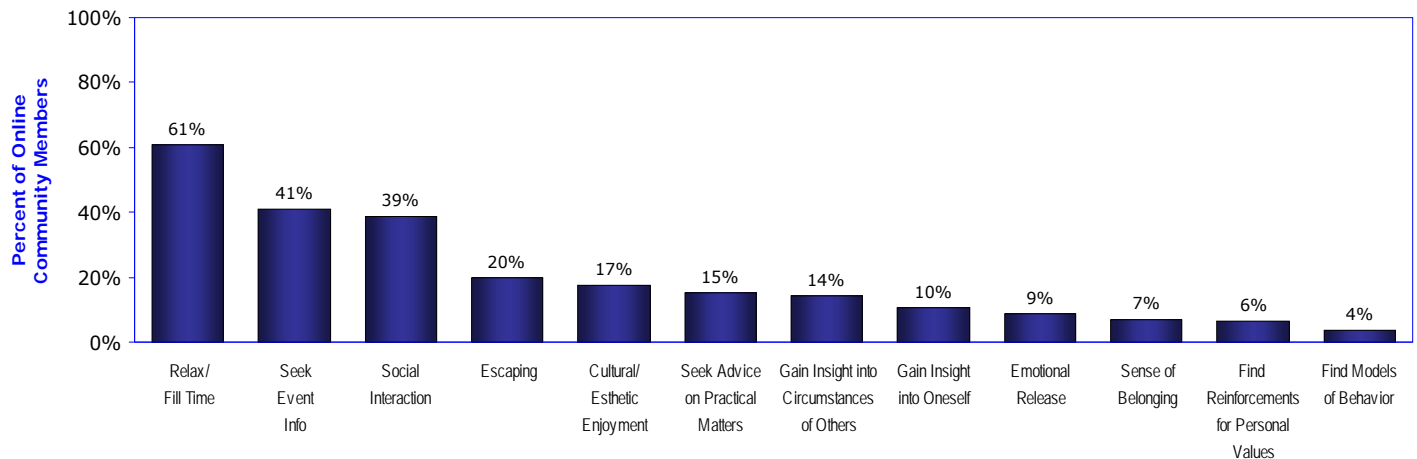
(Q1209H H-1)

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

Online community members reported a wide range of reasons for visiting video sharing services such as YouTube and social networking Web sites such as MySpace, with relaxing or filling time at the top of the list (reported by 61 percent of those who visit sites for social networking and video sharing).

The other top reasons for visiting these sites are for seeking event information (41 percent) or social interaction (39 percent). Users also report several reasons that involve personal values, such as gaining insight into the circumstances of themselves or other members, looking for a sense of belonging, or finding models of behavior.

**Why Do You Visit Web Sites For Video Sharing And Social Networking
Such As YouTube, MySpace, Facebook, and Hi5?**

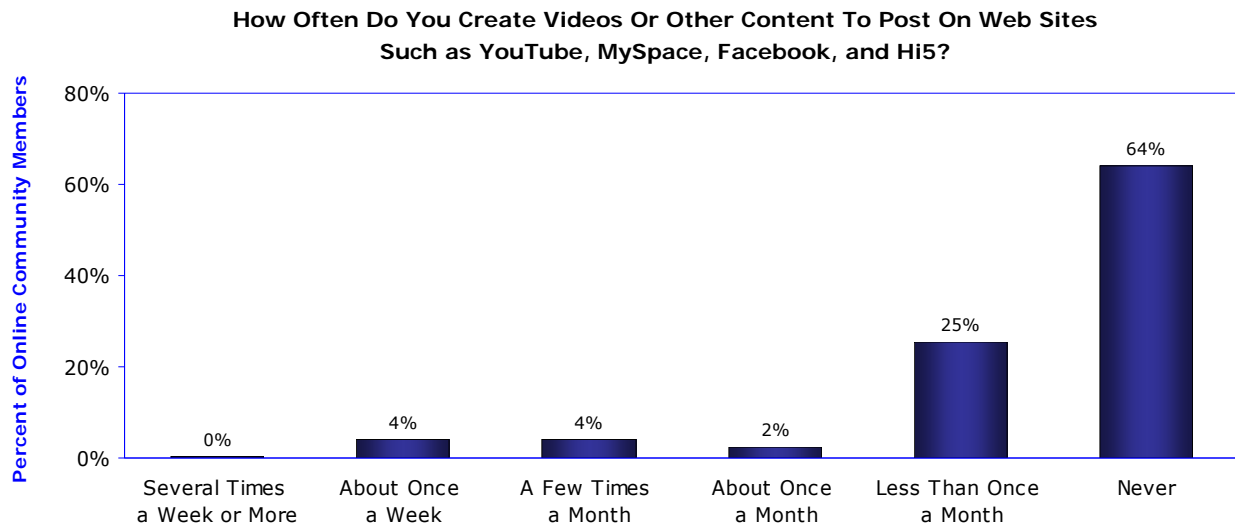


(Q1209I H-1)

Posting Content Online By Online Community Members

Among all online community Web site visitors, almost two-thirds (64 percent) said that they never create videos or other content to post on Web sites such as YouTube, MySpace, Facebook, and Hi5.

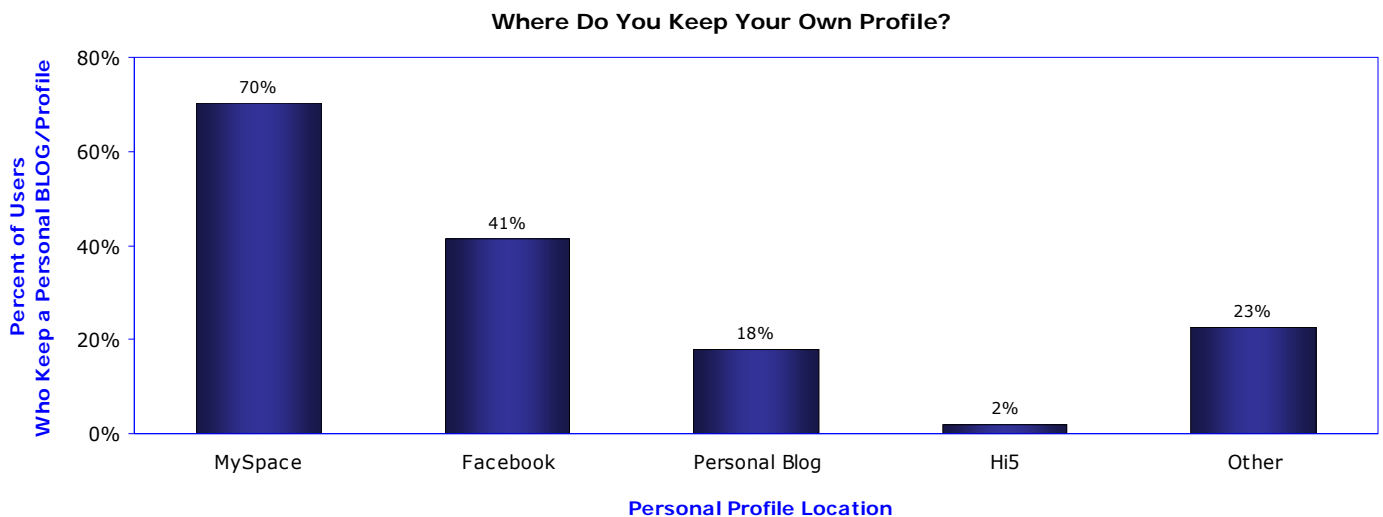
Of those who do post content, more than one-quarter post less than once a month.



(Q1209J H-1)

Where Do Users Keep Their Online Profiles?

In a new question, Internet users were asked where they keep their personal blog or profile. A large majority -- 70 percent -- said they use MySpace, while 41 percent use Facebook.



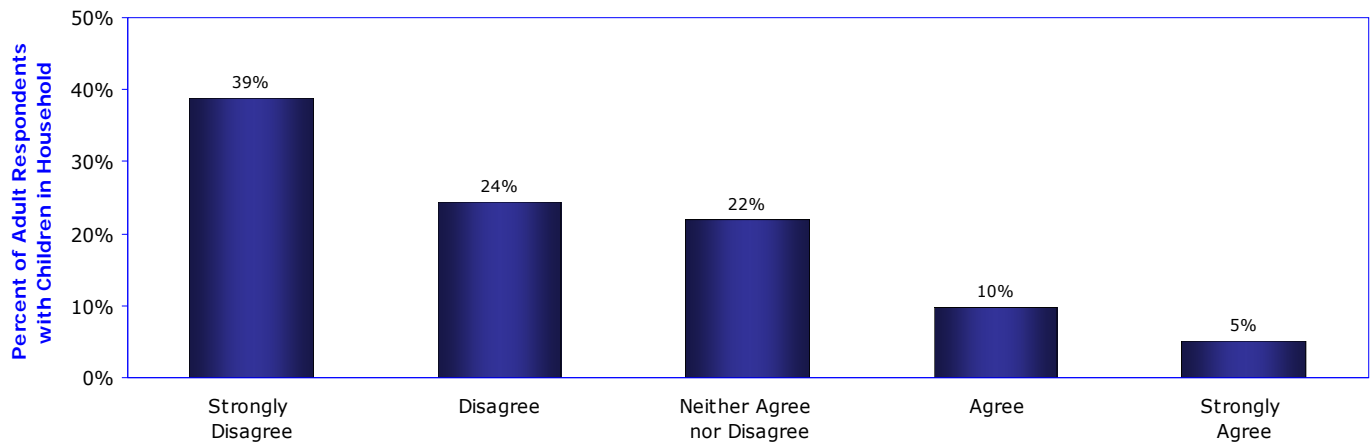
(Q712 JL-1 -- multiples responses possible)

Children Participating In Online Communities: The Adult View

Although participation in online communities Web sites for video posting and social networking is increasing, a large percentage of adults are uncomfortable with the children in their households participating in online communities.

In a new question for the Digital Future Project, adults with children in their household were asked if they were comfortable with the children participating in online communities; 63 percent disagreed, while only 15 percent agreed.

I Am Comfortable With The Children In My Household Participating In Online Communities



(Q533 M-6)

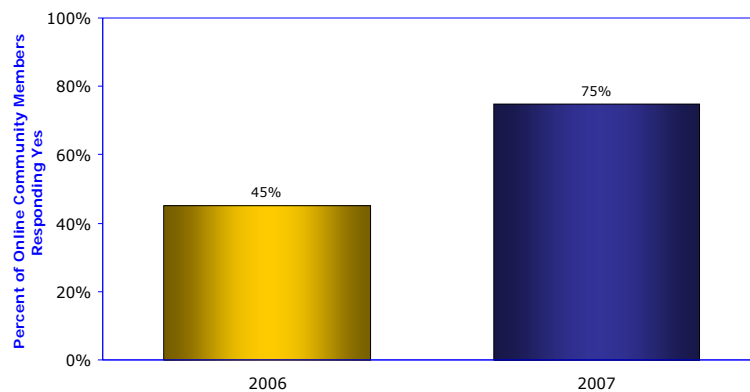
Online Communities And Social Causes

Members of online communities report high levels of participation in the social causes and non-profit organizations they are involved with on the Internet.

Participation In Online Communities Related To Social Causes

Three-quarters of online community members in the current Digital Future Project said they use the Internet to participate in communities related to social causes -- up 30 percent from 2006.

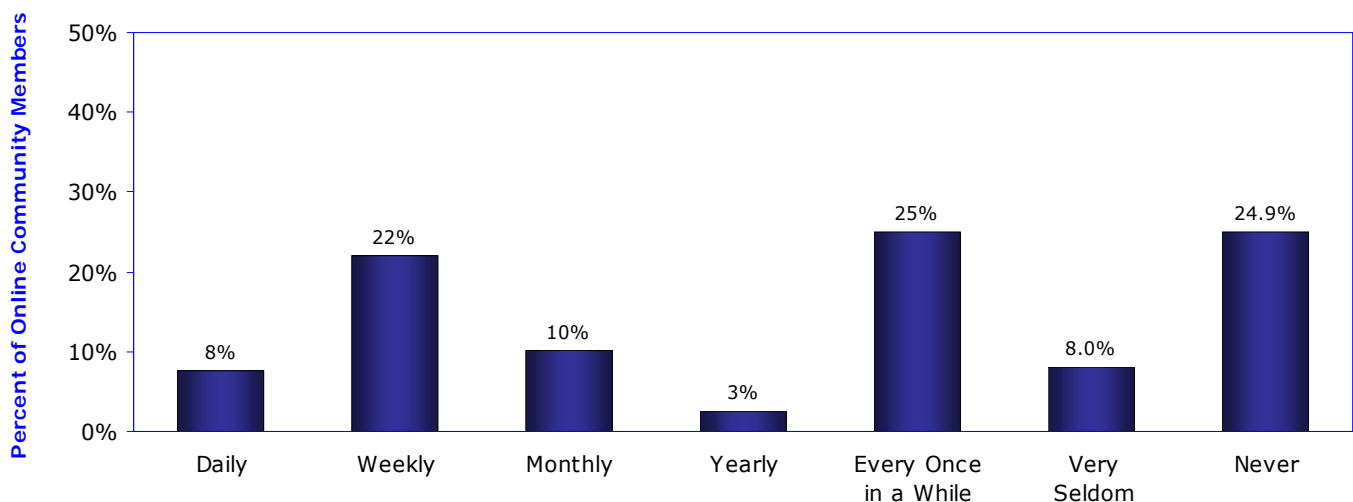
Do You Use The Internet To Participate In Communities Related to Social Causes?



(Q1209E H-2)

Forty percent of online community members said they use the Internet at least monthly to participate in communities related to social causes.

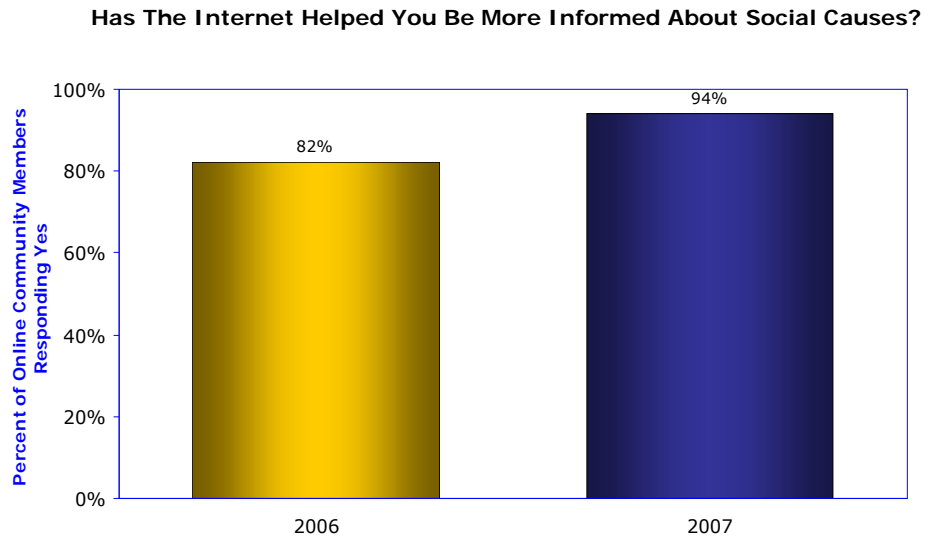
**How Often Do You Use The Internet To Participate In Communities Related to Social Causes?
(Frequency)**



(Q1209E H-1)

The Internet: An Aid For Users To Stay Informed About Social Causes?

Almost all members of online communities (94 percent) said the Internet helps them become more informed about social causes.



(Q1209F H-2)

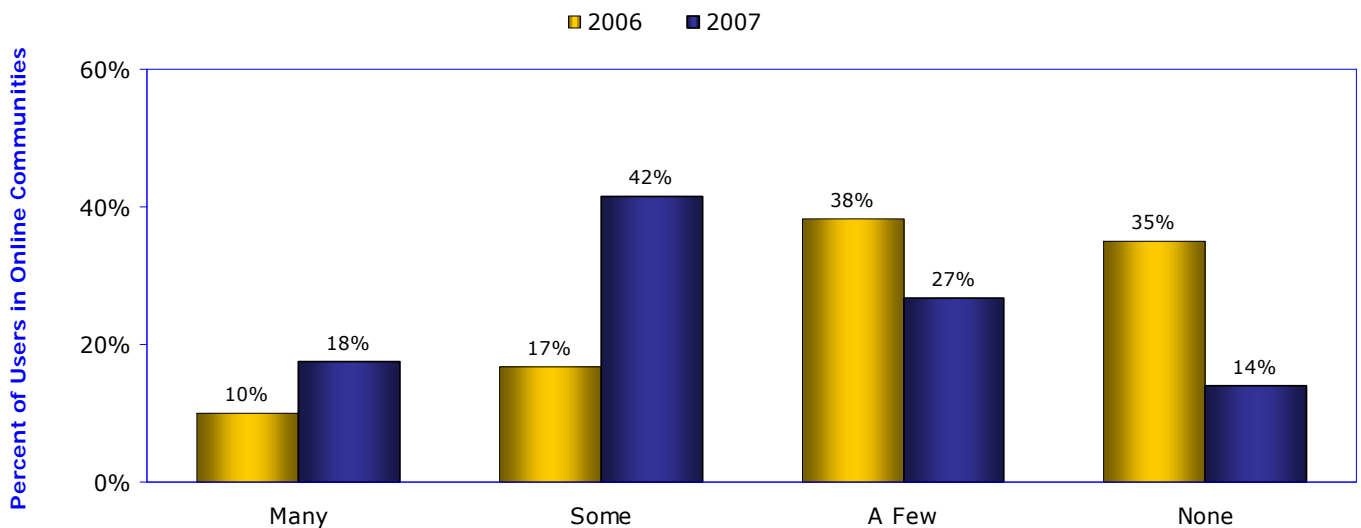
Are You Participating In New Social Causes Because Of Online Communities?

Large and growing percentages of online community members are participating in social causes that are new to them since their involvement in online communities began.

Eighty-seven percent of online community members who participate in social causes said they are involved in causes that are new to them since they began participating in an Internet community.

Only 14 percent of online community members said that none of the social causes in which they are involved are new to them -- down from more than one-third (35 percent) in 2006.

**How Many Social Causes That You Participate In Are New To You
Since Becoming Involved In Online Communities?**

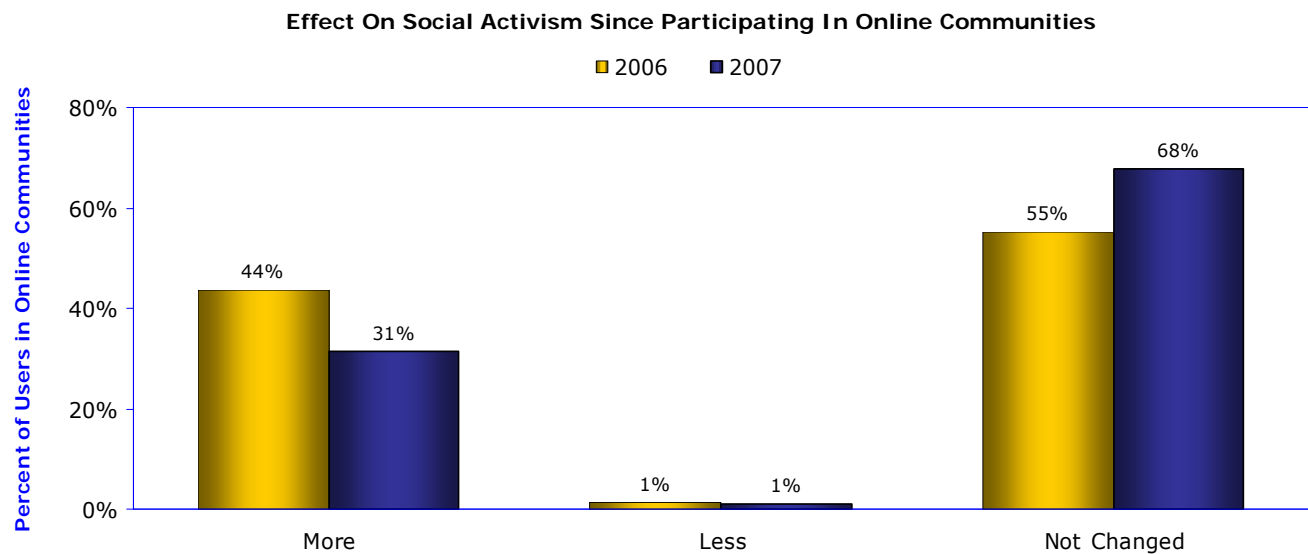


(Q1209 E-1 H-1)

Social Activism And Participation In Online Communities

Although many online community members are actively involved in social causes, a lower percentage said that their activism has increased since they began participating in online communities compared to 2006.

Thirty-one percent of online community members said they participate more in social activism since they started participating in online communities -- down from 44 percent in 2006. In the current study, more than two-thirds (68 percent) said their social activism has not changed since they started participating in online communities for social causes.

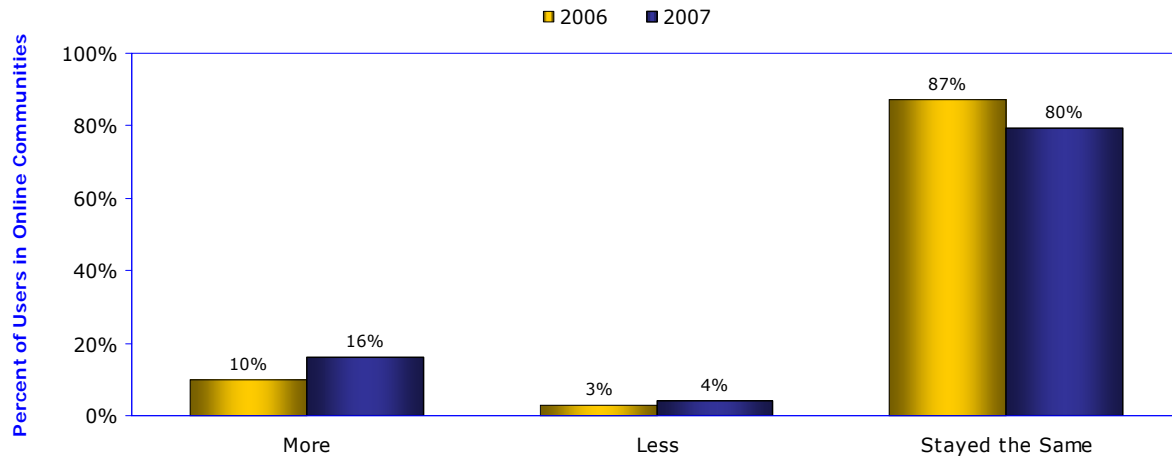


(Q1209 E-2 H-1)

Has Offline Participation In Social Issues Changed Because Of Online Involvement?

Although large percentages of Internet users said they participate in online social causes, only 16 percent said that they are involved more often in offline social issues as a result of their online participation.

Do You Participate In Social Causes Offline More Often Or Less Often As A Result Of Your Online Participation In These Communities?

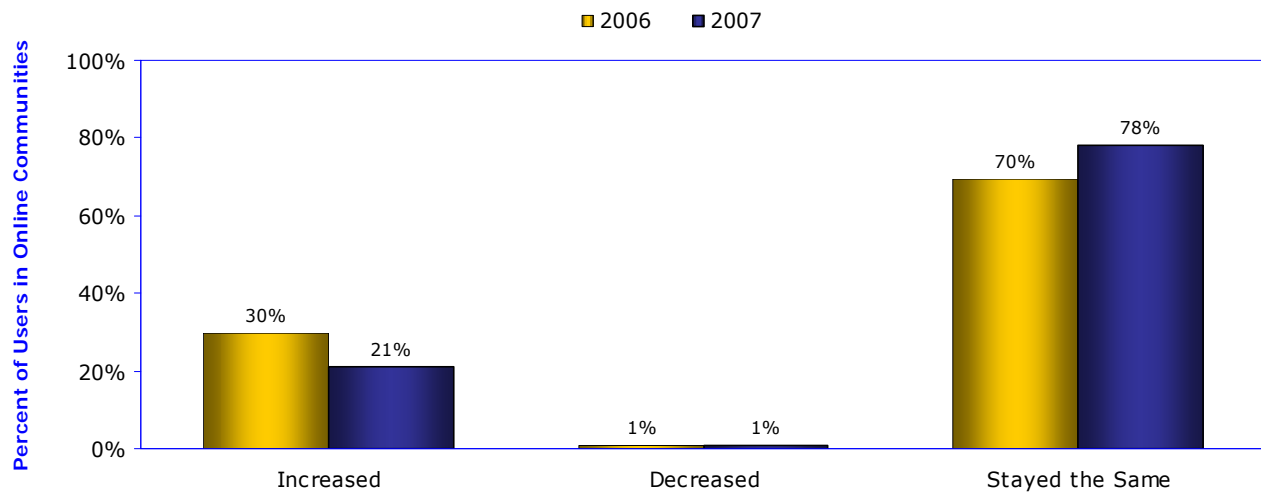


(1209E3 H-2)

Online Communities: Participation In Non-Profit Organizations

A growing percentage of online community members also report that their participation in non-profit organizations has stayed the same since they started using the Internet. Only 21 percent of online community members said their involvement in non-profit organizations has increased -- down from 30 percent in 2006.

Level Of Involvement In Non-Profit Organizations Since Internet Use Began

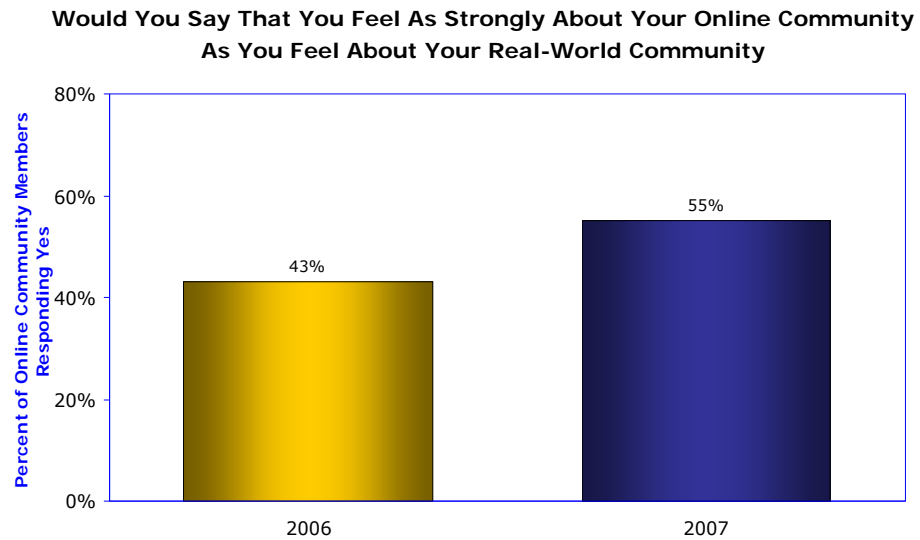


(Q1209G H-1)

Are Online Communities As Important As The Real World?

For the second year in a row, a large percentage of members of online communities feel as strongly about their online communities as they do about their real-world communities.

Fifty-five percent of online community members said they feel as strongly about their online communities as they feel about their real-world communities, an increase from 43 percent in 2006.



(Q1209C H-2)

Children And The Internet

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

....spend too much time online 25%

***....spend too much time
watching television 49%***

***Children who said that
going online is important
to their school work 71%***

***Adults who said that
since going online,
the grades of children
in their households
have stayed the same 71%***

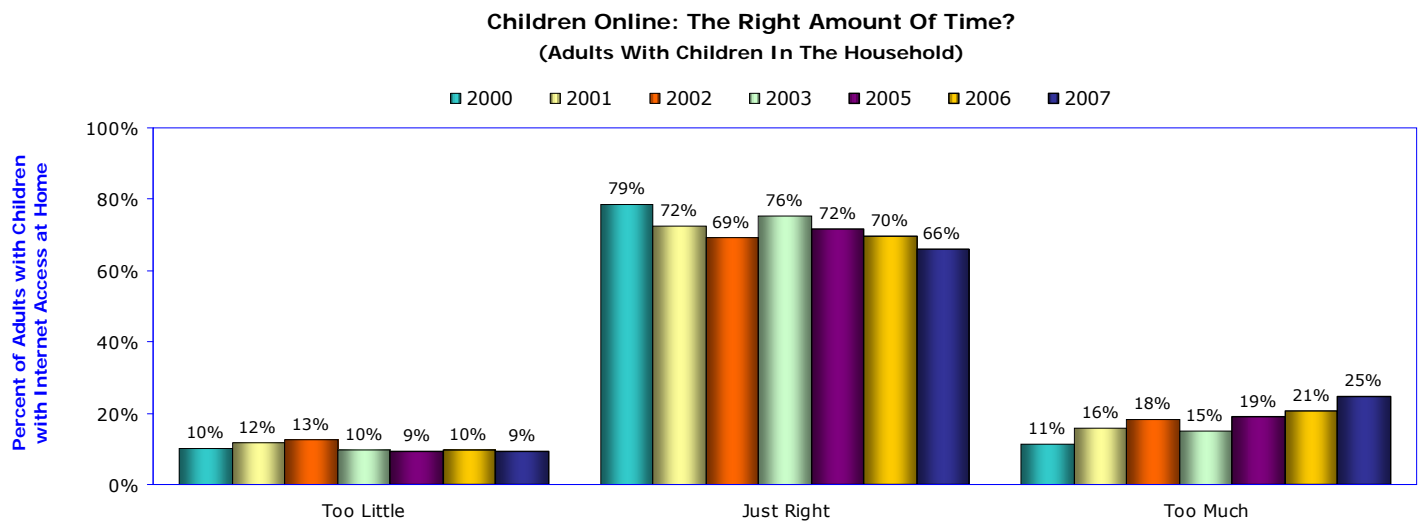
***Adults who use denial
of the Internet
as a punishment tool 62%***

Children And The Internet

Internet Use: The Right Amount Of Time For Children?

Do children spend too much time online?

The small but growing percentage of adults who said that the children in their households spend too much time using the Internet reached 25 percent of respondents -- the highest number in the seven years of the Digital Future Project. In the current study, 66 percent of adults said that the children in their households spend the right amount of time online -- the lowest level in all seven years of the studies.

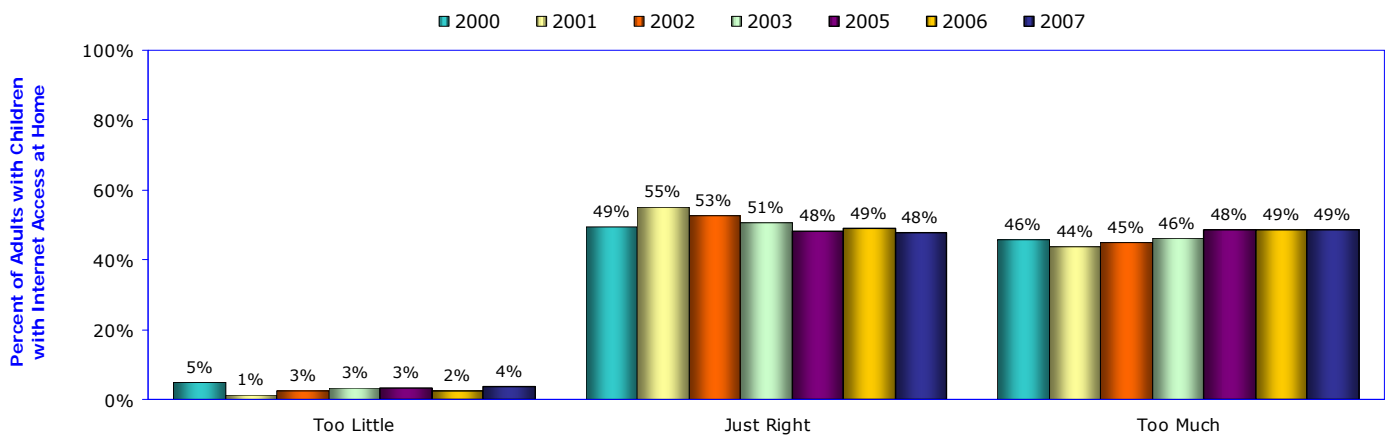


(Q1120 JC-3)

Television Viewing: The Right Amount Of Time For Children?

In all seven studies in the Digital Future Project, more than 40 percent of adults said that the children in their households spend too much time watching television. That percentage has reached the highest level in the study for the second year in a row (49 percent).

Children Watching TV: The Right Amount Of Time?



(Q1120 JC-2)

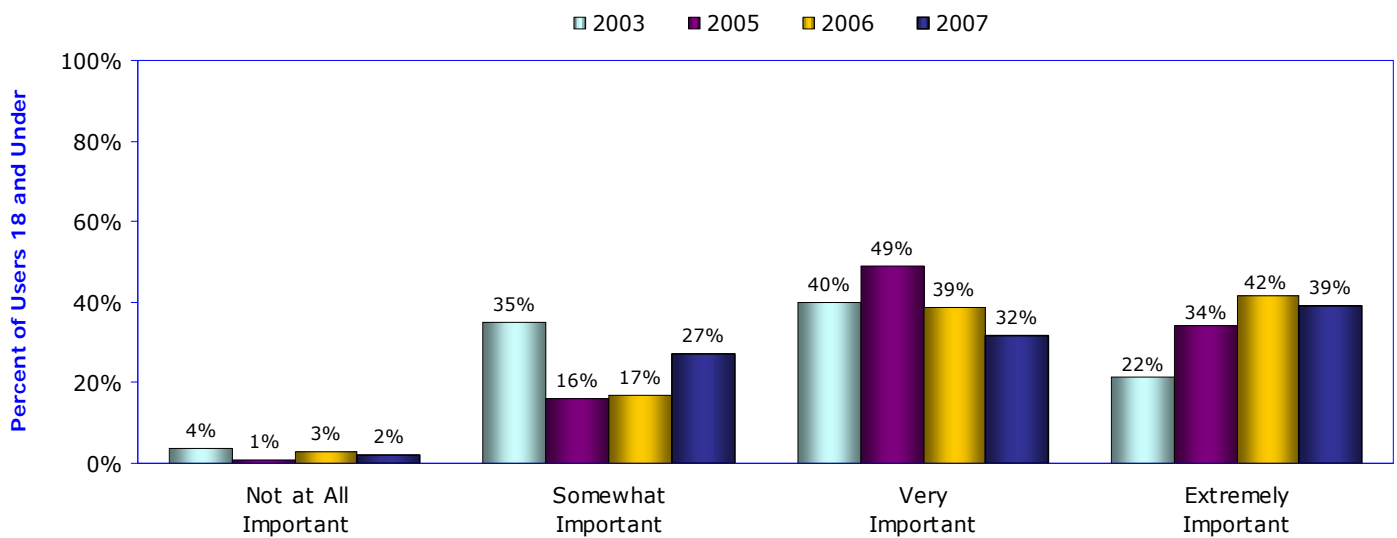
The Internet and Schoolwork: Children's Views

Children and adults in the current Digital Future Project continue to express conflicting views about the importance of the Internet for schoolwork.

Almost all Internet users age 18 and under said that going online plays a major role in their schoolwork, but the level of importance has declined slightly. Seventy-one percent said that the Internet was very important or extremely important for their schoolwork -- down from 81 percent in 2006 and 85 percent in 2005.

The number of Internet users age 18 and under who said that going online was only somewhat important increased to 27 percent, up from 17 percent in 2006.

How Important Is The Internet For Your Schoolwork?



(Q1135 JC-2)

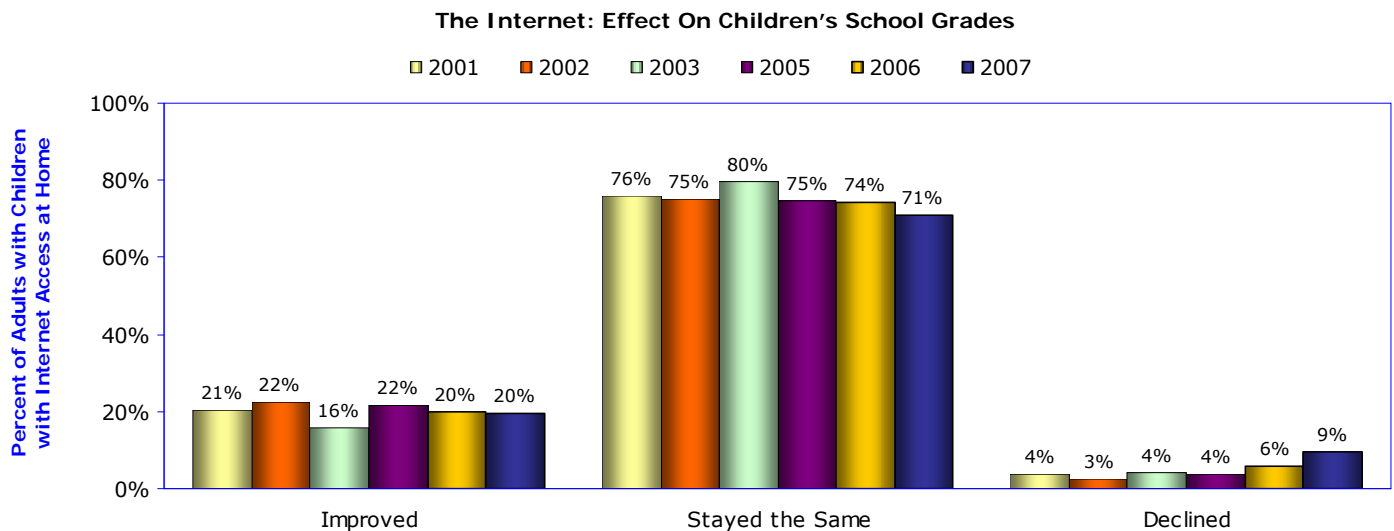
Internet Use And School Grades: The Adults' View

As in the previous years of the Digital Future Project, adults take a different view than children of the Internet's value for schoolwork. And the adult view of the Internet as a negative influence on grades is growing.

While large percentages of students continued to report that going online is a vital part of their schoolwork, most adults said that the Internet has no effect on school grades for the children in their household. And, the number of adults who said that the grades of the children in their household has declined since the household started to use the Internet has grown for the second year in a row.

Almost 71 percent of adults said that since their household acquired the Internet, the grades of children in their households have stayed the same -- a finding that has remained generally the same in all six years this question has been asked.

Only 20 percent of adults in 2006 said that the Internet improves the grades for the children in their household.



(Q1080 H-3)

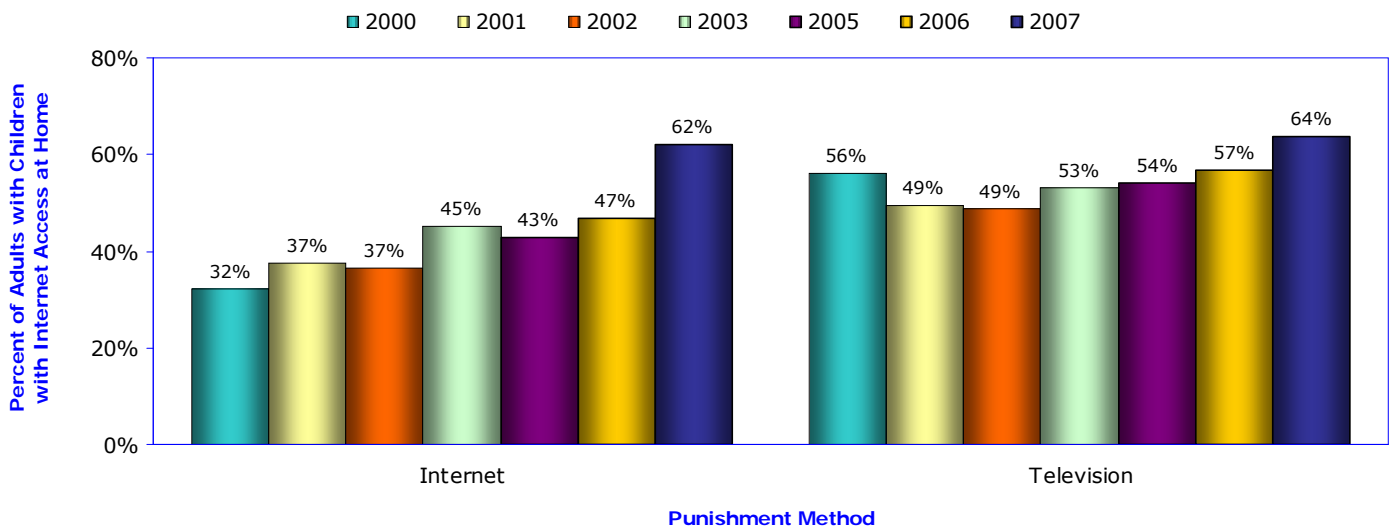
Internet Use And Television Viewing: Use As Punishment Tools

Denying access to both the Internet and television as a punishment tool for children continued to increase, and reached their highest levels to date.

Denial of Internet use as a punishment tool has grown steadily since the first Digital Future study, and jumped substantially to 62 percent of adult users with children in their households.

An even higher percentage of adults -- 64 percent -- said that the children are punished by losing their television privileges.

Internet Access And Television Viewing: Denied As A Punishment Tool?



(Q1070 and Q1100 M-3)

Political Power And Influence

Users who said. . .

*. . . the Internet has
become important
for political campaigns* **64%**

*. . . by using the Internet
public officials will care
more about what people think* **22%**

*. . . the Internet helps people
to better understand politics* **55%**

*. . . the Internet can give people
more say in what
government does* **28%**

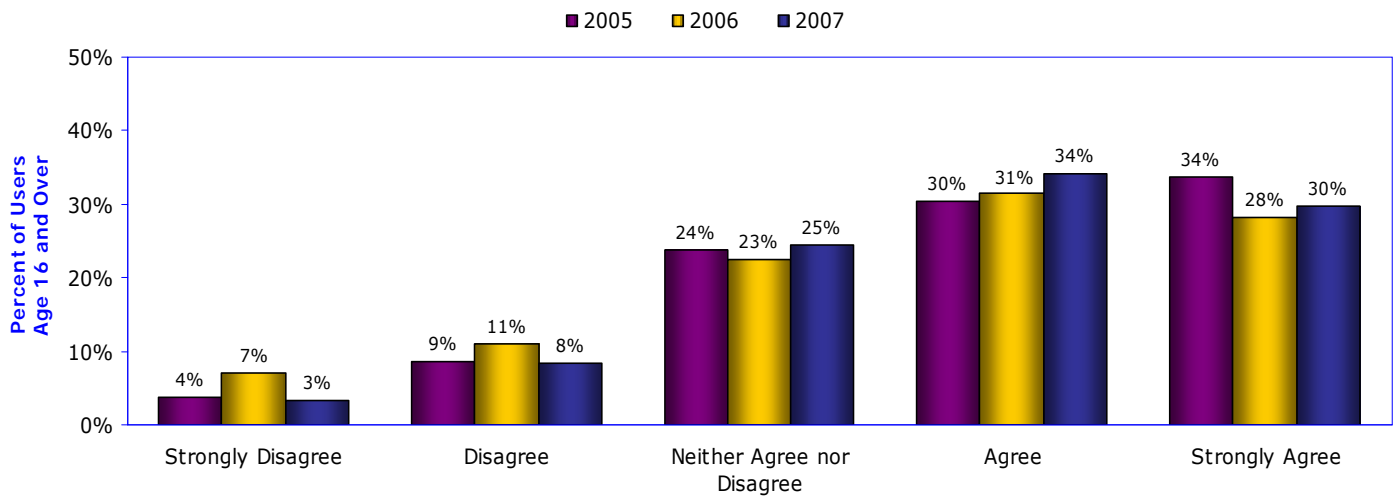
*. . . by using the Internet
people like you can have
more political power* **30%**

*Users who agree that they are
interested in voting online* **37%**

Is The Internet Important In Political Campaigns?

Sixty-four percent of Internet users agreed that the Internet has become important for political campaigns -- up from 59 percent of users in 2006.

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



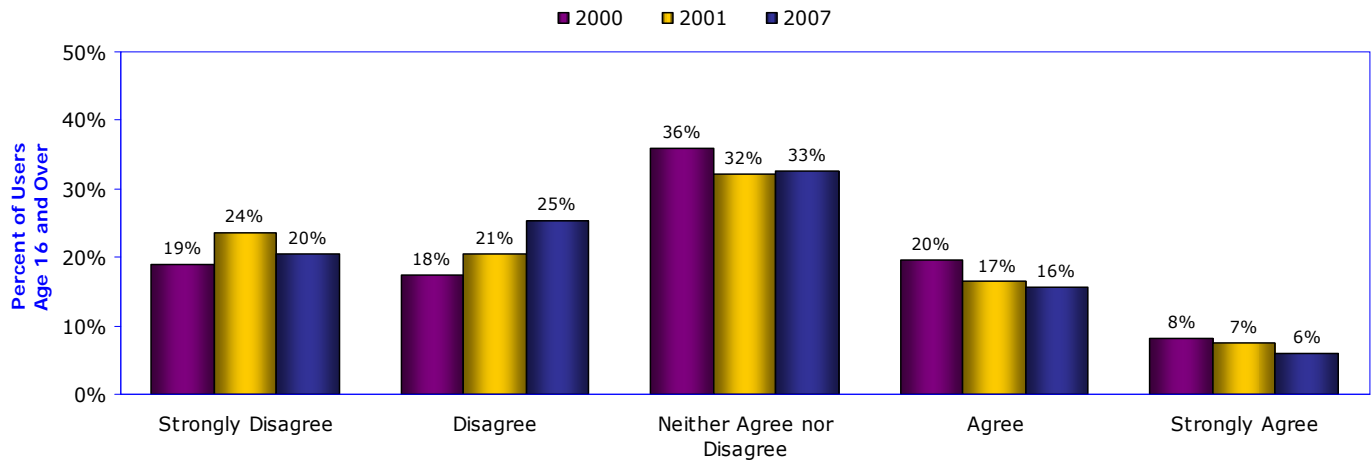
(Q190E M-3)

Is the Internet A Tool For Political Influence?

Can the Internet encourage public officials to care more about what people think? Only a small percentage of respondents said yes, and the number is declining.

Twenty-two percent of respondents age 16 and older agree or strongly agree that by using the Internet public officials will care more what people think -- down from 24 percent in 2001 and 28 percent in 2000, when these questions were last asked in the Digital Future Project.

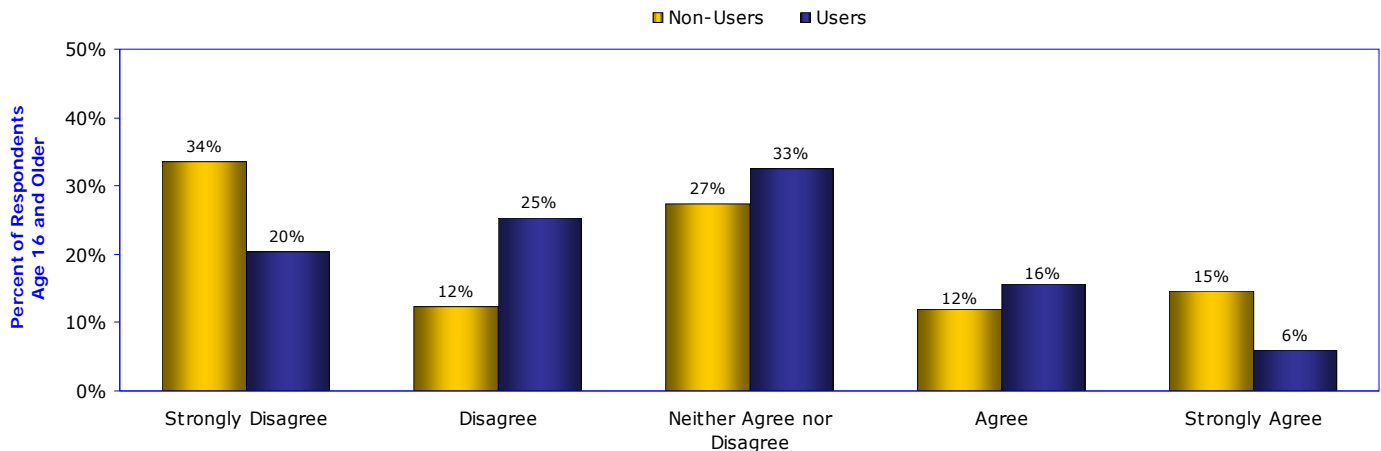
**By Using The Internet Public Officials Will Care More About What People Think
(Internet Users 16 And Older)**



(Q190D M-3)

More Internet non-users than users agree that by using the Internet, public officials will care more about what people think -- 27 percent of non-users compared to 22 percent of users.

**By Using The Internet Public Officials Will Care More About What People Think
(Internet Users Vs. Non-Users)**



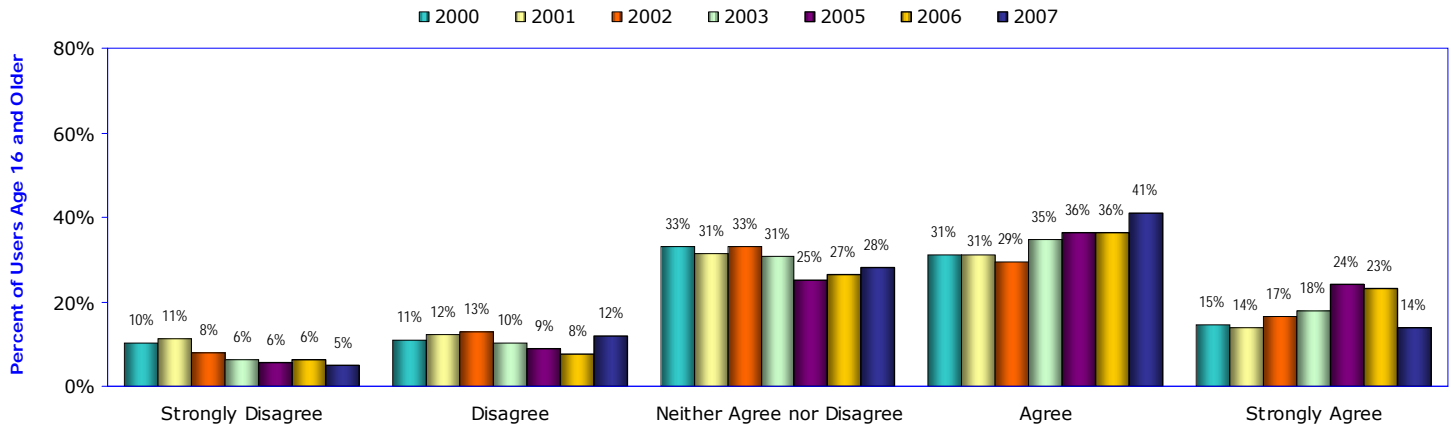
(Q190D M-2)

The Internet: Does It Help People Better Understand Politics?

In the current Digital Future Project, belief that the Internet can be a tool for learning about the political process continues to remain high, but has declined slightly for the second consecutive year.

Fifty-five percent of users age 16 or older agree or strongly agree that using the Internet allows people to better understand politics, down from 59 percent in 2006 and 60 percent in 2005.

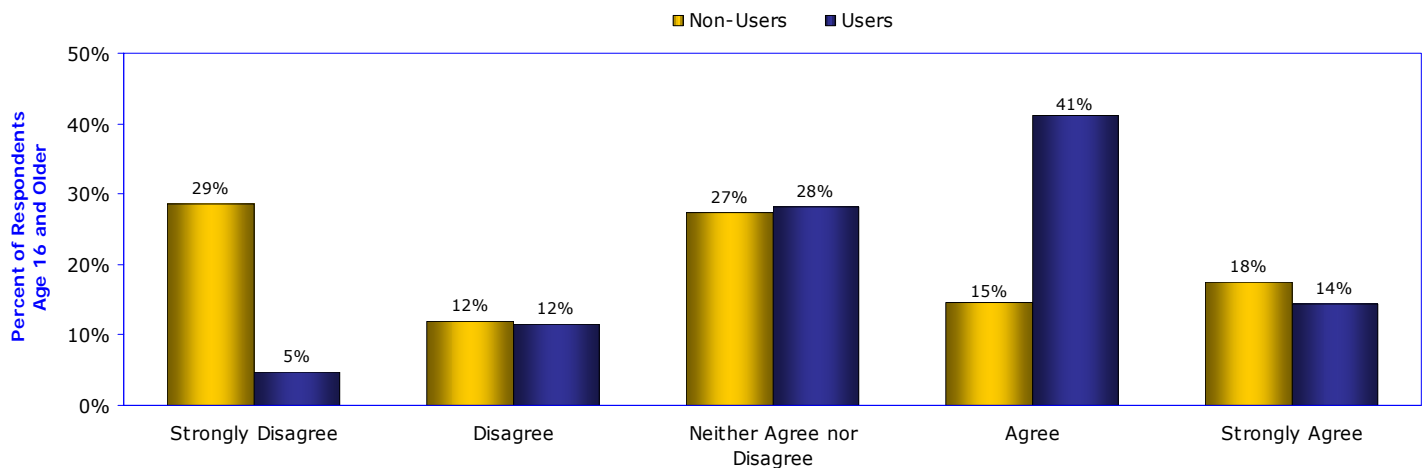
Using The Internet Allows People To Better Understand Politics



(Q190C M-3)

Among non-users, 33 percent agree or strongly agree that the Internet can help people better understand politics, up from 29.8 percent in 2006 but slightly lower than in 2005 (35 percent).

By Using The Internet, People Like You Can Better Understand Politics



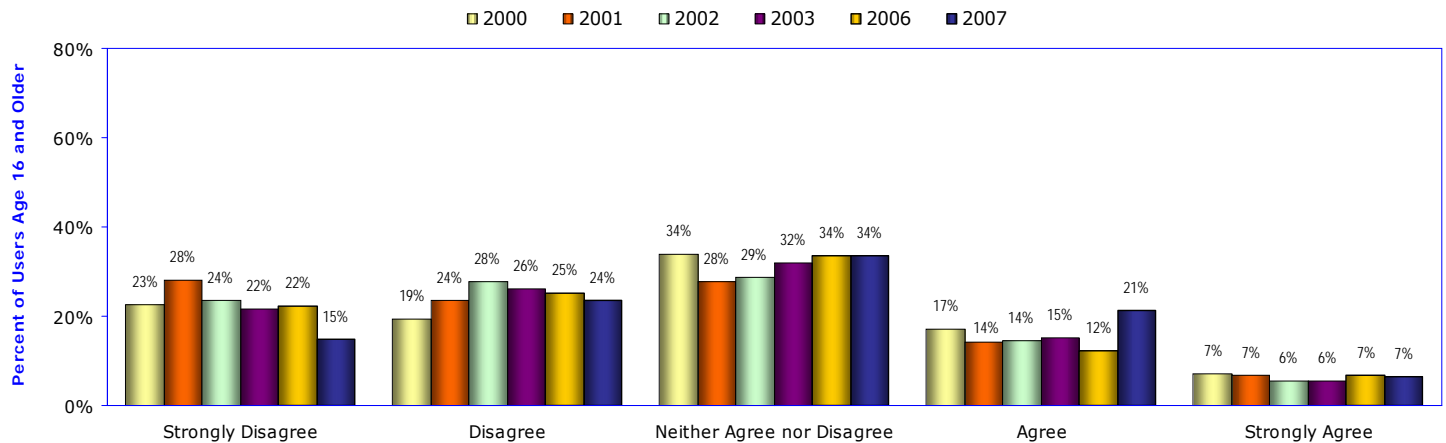
(Q190C M-2)

Does the Internet Give People More Say In What The Government Does?

Among all respondents, a growing percentage (28 percent) agree that using the Internet gives people more of a say in what government does -- up from 19 percent in 2006.

Overall, the percentage of respondents who disagreed with this statement declined to 39 percent, compared to 47 percent in 2006.

By Using The Internet, People Like You Can Have More Say On What the Government Does (Respondents Age 16 Or Older)



(Q190B M-3)

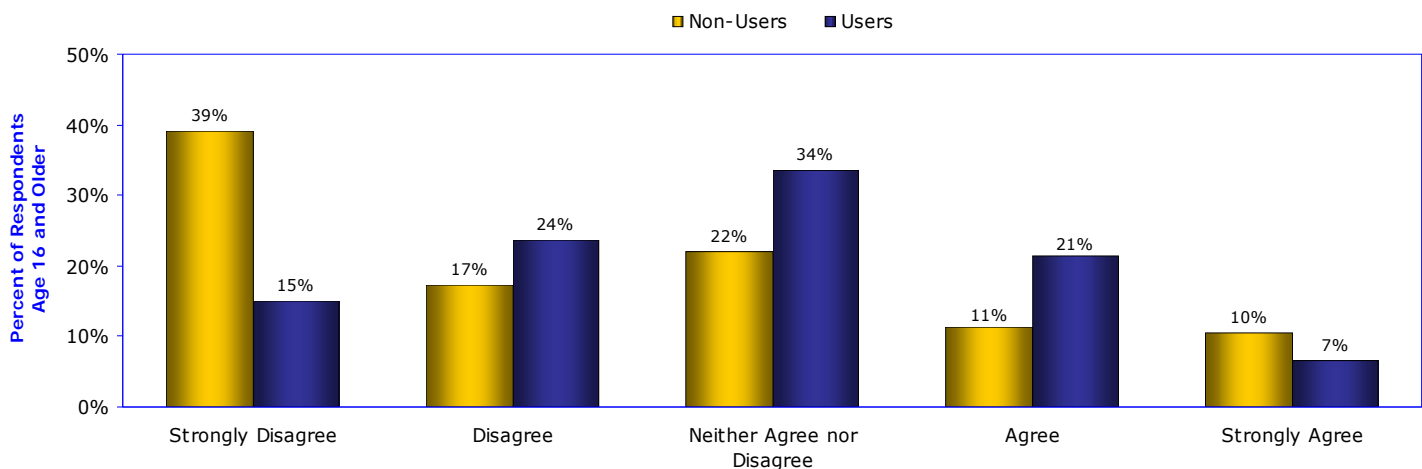
Does the Internet Give People More Say In What The Government Does? Internet Users Vs. Non-Users

A much larger percentage of non-users compared to Internet users disagreed that the Internet gives people more say in what the government does. Among non-users, 56 percent disagreed with this statement, down slightly from 58 percent in 2006.

Of Internet users, 39 percent disagreed, down from 47 percent in 2006.

Among Internet users in the current Digital Future Project, 28 percent agree that the Internet gives people more of a say in government, up from 19 percent in 2006.

By Using The Internet, People Like You Can Have More Say On What the Government Does



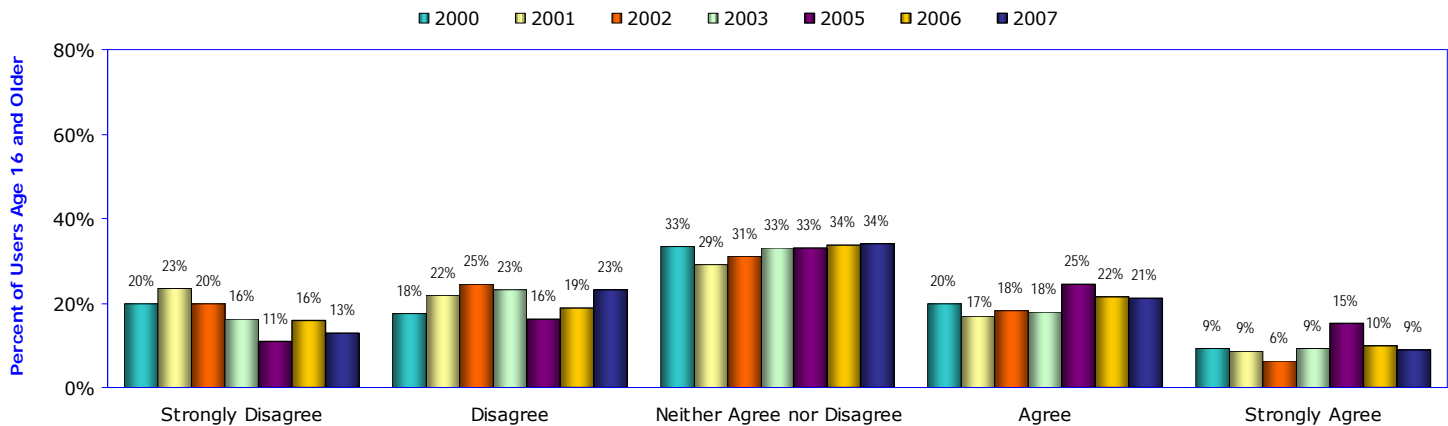
(Q190b M-2)

Is The Internet A Tool To Help Gain Political Power?

The number of users who said that the Internet gives people more political power stayed about the same in the current study after declining in 2006. Thirty percent of users agree or strongly agree that by using the Internet, people can have more political power, down marginally from 31 percent in 2006.

At the same time, the percentage who strongly disagreed with this statement also declined.

By Using The Internet People Like You Can Have More Political Power

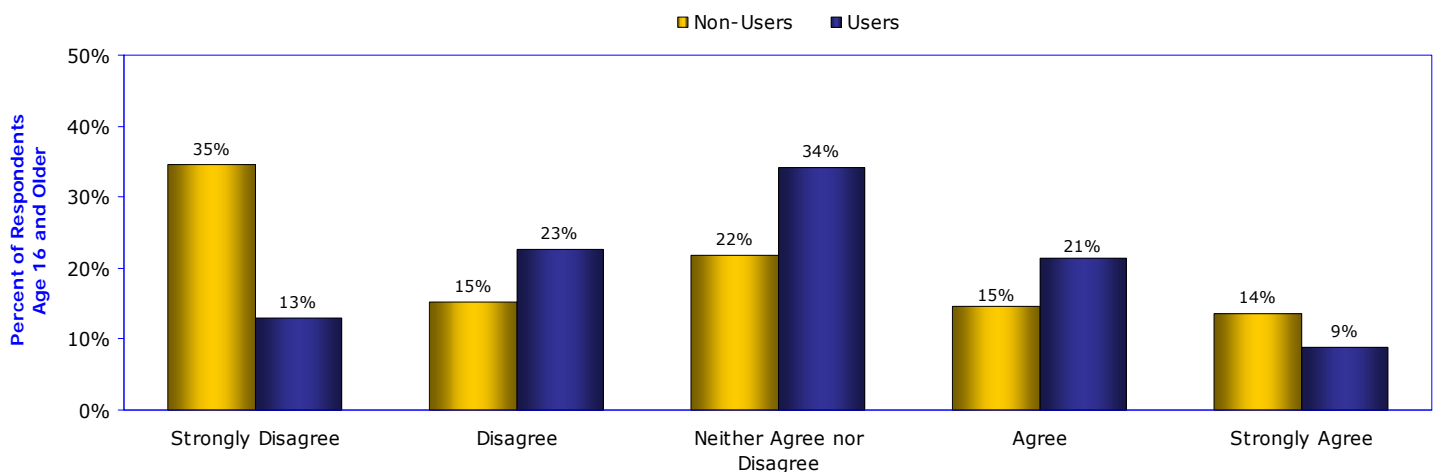


(Q190A M-3)

Among Internet users, 30 percent agree or strongly agree that the Internet gives people like them more political power (down slightly from 31 percent in 2006).

A larger percentage of Internet non-users than users strongly agree with this statement..

By Using The Internet People Like You Can Have More Political Power

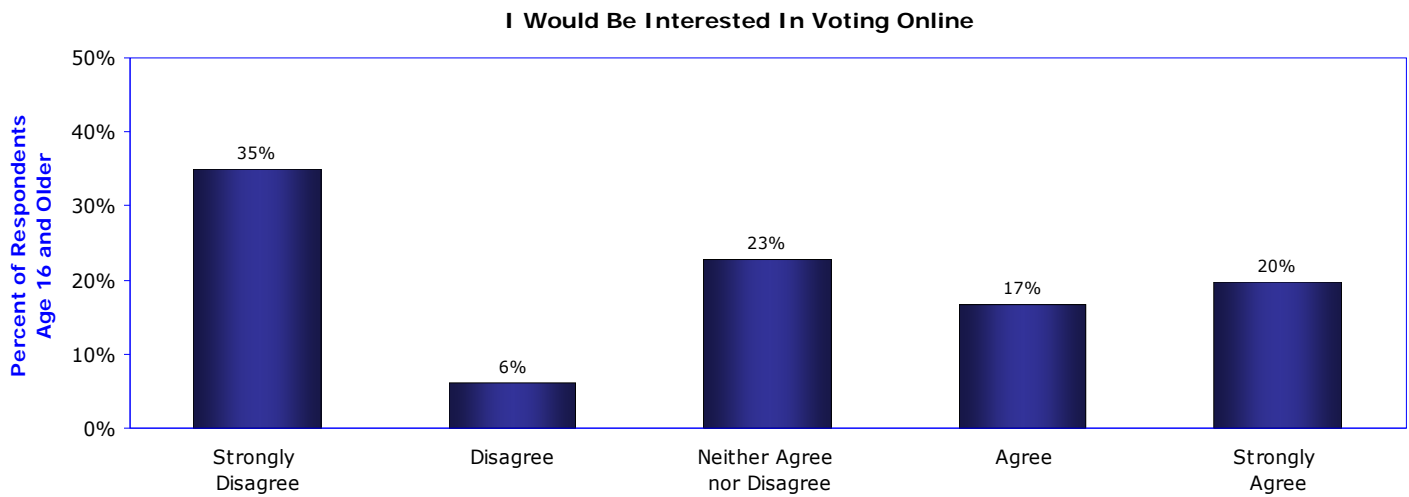


(Q190A M-2)

Voting Online: A Split Decision

Are Americans interested in voting online? The vote is split, with no clear winner.

In a new question for the Digital Future Project, respondents were asked about their interest in voting online. Among respondents 16 and older, 41 percent disagreed or strongly disagreed with this statement, while 37 percent agreed or strongly agreed.



(Q533 M-1)

The 2008 Digital Future Project: Trends and Issues

The Maturing Of The Internet

The breakthrough technology that makes going online possible was developed 38 years ago, but as a tool for public use, the Internet has only now reached its teen years. More than 13 years have passed since the portals of the online world were opened to general public use, and the Internet's role as a tool for information and entertainment is more securely established and pervasive than ever. An entire generation of children has never known a world without the Internet or personal computers. Seventy percent of Americans have been using the Internet for at least seven years (page 24). Use of the Internet at work now exceeds an average of 15 hours per week (page 30), and going online at home has surpassed an average of 10 hours a week (page 31). More than three-quarters of users go online at home through a high-speed broadband connection (page 36), and for more than two-thirds of those users, the Internet is an "always on" device (page 38).

The Digital Future Project continues to identify evidence of how this maturing of the Internet affects its users. These developments reflect the benefits -- as well as some intriguing drawbacks -- of going online.

Here are several trends, issues, and questions that emerged in the 2008 study:

The Internet: Signs of Discontent?

Are Americans becoming more concerned about the role the Internet plays in their lives? The Digital Future Project is identifying some sobering trends in views about going online -- opinions which may be most evident in the evolving responses from adults about children's use of the Internet.

A small percentage of adults said that the children in their households spend less time with friends, but that percentage increased for the third year in a row and has now reached its highest level in the seven years of the Digital Future Project (page 98). A majority of adults said that online predators are a threat to the children in their households (page 99). Almost two-thirds of adults are uncomfortable with the children in their households participating in online communities (page 114). The small but growing percentage of adults who said that the children in their households spend too much time using the Internet reached 25 percent of respondents -- the highest number yet reported in the seven years of these studies (page 122). And, the number of adults who said that the grades of the children in their household has declined since the household started to use the Internet has grown for the second year in a row (page 125).

Generally, the views of users about the Internet remain overwhelmingly positive. But as our exploration of the Internet and its effects continues, the consequences and negative aspects of going online will continue to play a major role in our research.

Self-expression Online: Extraordinary Growth

Self-expression through online opportunities -- posting information, sharing photos, or maintaining a personal Web page or blog -- is growing at an impressive rate. The percentage of Internet users who keep blogs has quadrupled in four years, and now more than 40 percent of Internet users post photos online (page 74). Smaller but steadily growing percentages of users maintain their own Web sites.

Increases in online self-expression are complemented by the equally interesting questions surrounding the growing involvement of Internet users in online communities (pages 115-120). In what ways will these budding forms of communication change how users express themselves?

Internet Dropouts and Non-Users: The Trends Continue

Last year, this study asked if America has a "permanent subclass" of people who, for a variety of reasons, have either chosen to not use the Internet or stopped going online. In the current study, the number of "Internet dropouts" (previous users) who said they will go back online declined to the lowest level in the five years this question has been asked in the Digital Future Project (page 48). Among non-users, 54 percent said they are unlikely to go online in the next year (page 50).

Non-users report a variety of disadvantages about not being online, such as being excluded from communications, feeling disadvantaged during job transitions, or having difficulty obtaining information for their jobs or personal interests (page 49). How will the disadvantages and drawbacks of not going online affect non-users in a world that is becoming increasingly Internet-dependent?

Media Use: The Beginnings Of Major Change

With the maturing of the Internet have come a wide range of responses about information and entertainment that are illustrating how media use is rapidly changing.

A high percentage of users consider the Internet to be an important source of information for them, surpassing the views about any other principal media (page 52). A significant minority of respondents are time-shifting their TV viewing with digital video recorders (page 64). More than one-quarter of respondents said they would not miss the print edition of their newspaper if it was no longer available (page 69). Twenty-one percent of Internet users agreed that they have stopped a subscription for a newspaper or magazine because they now get the same or related content online (page 70).

The views about access to information and media reflect the reshaping of all media and the growing reliance on the Internet as a primary information source.

Online Communities: The Social Effects Grow

Only a few years ago, membership in an online community was practically non-existent in the United States. Now we are witnessing the beginnings of the broad and profound social impact produced by participation in online communities.

Consider that: membership in online communities has more than doubled in only three years (page 101), and large percentages of members report that their community involves their social and professional lives (page 103). More than half of online community members log into their community at least once a day (page 104), and 71 percent of members said their community is very important or extremely important to them (page 105).

The impact of online community membership is extending into real-world actions. A growing percentage of online community members take actions offline at least once a year that are related to their online community (page 107), and a majority of members eventually meet their counterparts in person (page 110).

Of particular relevance is the effect of online community membership on participation in social causes. Three-quarters of online community members said they use the Internet to participate in communities related to social causes, with 40 percent saying that they use the Internet at least monthly to participate in such communities (page 115). Large and growing percentages of online community members are participating in social causes that are new to them since their involvement in online communities began, and more than 90 percent of online community members said the Internet helps them become more informed about social causes (page 116).

And, perhaps the most intriguing finding about online communities: a large and growing percentage of members -- now more than half -- say they feel as strongly about their online communities as they do about their real-world communities (page 120).

Clearly, the growth of online communities is opening a range of opportunities for social connection and involvement that could not have been anticipated even five years ago. The emergence of online communities is now demonstrating that opportunities for involvement in online communities about any subject we choose and with people anywhere on Earth is possible and practical.

Exploring the trends and changes that online communities will inspire is a major priority of the Digital Future Project.

Is The Internet Important In Political Campaigns?

And finally, as we enter a national election season, the Digital Future Project continues to find a broad range of contrasting views about the impact of the Internet on the American political process.

Some examples: Almost two-thirds of users agree that the Internet has become important for political campaigns, and more than half of users age 16 or older agree that using the Internet allows people to better understand politics (page 130).

However, even as the Internet's role in political campaigning and candidate communication has increased dramatically, only small numbers of users believe that the Internet is a catalyst for political change. Less than one-quarter of users believe that the Internet is a tool to encourage public officials to care more about what people think (page 129), while only a slightly larger percentage agree that using the Internet gives people more of a say in what government does (page 131). And the percentage of users who said that the Internet gives people more political power has remained about 30 percent for two years (page 133).

How will the Internet affect the 2008 political campaigns? We will explore these issues in depth as our studies continue.

* * * * *

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 its first report on the Internet, the beginning of an international, long-term exploration of the impact of the Internet on society. This work is part of the World Internet Project, which is organized and coordinated by the Center; included in the World Internet Project are the Center's work and partner studies in countries in North America, Europe, South America, Asia, the Middle East, Australia, and New Zealand. 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.

Supplement 2

The World Internet Project – International Contacts

United States (Organizer)

Center for the Digital Future
 USC Annenberg School for Communication
www.digitalcenter.org

Argentina

Institute of Applied Economics & Fundacion de
 Investigaciones, Economicas Latinoamericanas
www.fiel.org.ar

Australia

Institute for Social Research
 Swinburne University of Technology
www.sisr.net

Bolivia

Universidad NUR
www.nur.edu

Canada

Canadian Internet Project
www.cipic.ca

Chile

P. Universidad Catolica de Chile
www.wipchile.cl

China

Chinese Academy of Social Sciences
www.wipchina.org/index.php

Columbia

CINTEL -- Centro de Investigacion de las
 Telecomunicaciones
www.cintel.org.co

Czech Republic

Masaryk University Brno
www.fss.muni.cz/ivdmr

France

Center for Political Research at Sciences-po
www.cevipof.msh-paris.fr

Germany

Deutsches Digital Institut
www.deutsches-digital-institut.de

Great Britain

Oxford Internet Institute
www.oii.ox.ac.uk/microsites/oxis

Hungary

ITHAKA, TARKI -- Social Research Center
www.wiphungary.hu
www.ithaka.hu/Kutatas/wip

Iran

University of Alzahra
www.Alzahra.ac.ir

Israel

The Research Center for Internet Psychology (CIP)
 Sammy Ofer School of Communications
 The Interdisciplinary Center
www.idc.ac.il/communications/cip/en

Italy

SDA Bocconi
 Bocconi University
www.sdabocconi.it/home/it/

Japan

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

Macau

University of Macau, www.umac.mo

Mexico

Tecnologico de Monterrey
www.cem.itesm.mx

New Zealand

Institute of Culture, Discourse and Communication,
 Auckland University of Technology
www.aut.ac.nz/research/research_institutes/ccr/projects/world_internet_project.htm

Portugal

CIES-ISCTE, <http://cies.iscte.pt>

Singapore

Singapore Internet Research Centre,
 Nanyang Technological University
www.ntu.edu.sg/sci/sirc

South Korea

Yonsei University, www.yonsei.ac.kr

Spain

Instituto Servilab, University of Alcala
<http://www2.uah.es/servilab/>

Sweden

World Internet Institute, www.wii.se

Supplement 3

Research methods

For both the original sample drawn in 2000, and the replacement samples selected in subsequent years, a national Random Digit Dial (RDD) telephone sample was used. This method gives every telephone number in the 50 states and the District of Columbia a close to equal chance of being selected.

In the initial call, an interviewer spoke to a person in the household 18 years of age or older to obtain a roster of all household members. At this point, a computer system (“CFMC Survent” 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.

In 2007, four calls attempts were made to reach and qualify a respondent. If a household refused once, it was not contacted again.

In 2007, when contacting panel members from the original sample, up to 11 call attempts were made to reach them. If the person interviewed in the prior year was no longer a member of the household, no substitution of a different household member was made.

The data was collected through a combination of telephone and Web surveys.

Those participating in the survey for the second, third, fourth, fifth, sixth, or seventh year were paid a monetary incentive.

Interviews were conducted in English. Interviewing took place between February 28th and August 6th of 2007.

To correct for discrepancies between the sample data and Census data, the sample data was weighted. Sample size was preserved during the weighting process.

The final sample for year seven of the Digital Future Project was derived from two different sources, and this complicated the weighting procedure. The first portion of the sample consisted of respondents who had participated in the survey in the past. The second portion consisted of a new random sample that was recruited to replace dropouts.

An examination of the profiles of each of these sample sources revealed differences from the most current U.S. Census results. Moreover, the differences varied depending on the sample source. As a result, the weighting for this year's survey consisted of two separate weighting adjustments, one for respondents that were repeats, the other for newly recruited respondents.

Each of the different sub-samples was weighted to correct for its primary sources of deviation from the Census. After this, the two samples were combined.

The following variables were used in the weighting adjustments, although in different ways for each of the two sample sources: gender, age, income, and education. In the final weighted blended sample, the largest deviation from current U.S. Census results occurred in the race category where the weighted total sample had 10 percent more whites and 7.4% less blacks than the national average. All other deviations were less than 5.9 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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