

The Digital Future Project 2009



Surveying The Digital Future
YEAR EIGHT

15 Years of Internet Use



USC Annenberg School

INDIVIDUAL EDITION

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The 2009 Digital Future Report

Surveying The Digital Future

Year Eight

15 Years of Internet Use

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The 2009 Digital Future Report

Surveying The Digital Future

Year Eight

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The 2009 Digital Future Report

Surveying The Digital Future

Year Eight

15 Years of Internet Use

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

The publication of Year Eight of the Digital Future studies comes at a milestone moment in the evolution of the Internet: 2009 marks 15 years since Web sites became generally available to the American public. In 1994, fewer than two of every ten Americans used the Internet; in 2009, more than eight in ten Americans go online. The primary purpose of the studies conducted by the Center for the Digital Future is exploring the profound changes in views and behavior that have occurred during those 15 years of Internet use -- as well as the changes yet to come.

The Center is the first organization to develop a longitudinal panel study of the views and behavior of Internet users and non-users. The Center’s work began in 1999; in 2000, we published our initial findings in what has become the comprehensive, year-to-year examination of the impact of online technology in 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, and Oceania.

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 individuals in more than 2,000 households across the United States, compiling the responses of Internet users and non-users. Each year we contact the same households to explore how online technology affects the lives of those who continue to use the Internet, those who remain non-users, and those who move from being non-users to users, and vice versa. (Those households that do drop out for whatever reason are replaced with new ones.) We are also noting changes as users shift from Internet access by modem to broadband.

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 all aspects of change on the Internet and its emerging applications; for example, in the past three years we have expanded our findings about online communities and social networking. We will continue to monitor online technology as it transforms in yet-unexpected ways.

Our analytical lens has evolved as well: this year, we adopted as one of the primary categories of our research a comparison of “light users” (5 hours or less per week online) vs. “heavy users” (more than 24 hours per week online) -- a change from our long-standing comparison of “new users” vs. “experienced users.” The reason? Now, when so few Americans can be identified as “new users,” the opportunities to develop meaningful data about users based on other factors -- such comparison changes in behavior based on the amount of time users spend online each week -- offer more prospects for insight.

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 2009 Digital Future Report includes findings that compare Internet users to non-users; light users (5 hours or less per week online) to heavy users (more than 24 hours per week 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 2009 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 this exploration of the views and behavior of Americans after 15 years of Internet use, as we continue to develop our understanding of 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 2009 Digital Future Project – Year Eight

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 seven years of this study, conducted in 2001, 2002, 2003, 2005, 2006, 2007, and 2008, have continued the year-to-year appraisal of more than 100 major issues, now focusing on Internet users vs. non-users, as well as light users (5 hours or less per week of use) compared to heavy users (more than 24 hours per week of use).

Here are highlights of the five major areas in the 2009 Digital Future Project:

* * * * *

Highlights: The 2009 Digital Future Project – Year Eight

“Light users” = 5 hours or less per week using the Internet

“Heavy users” = more than 24 hours per week on the Internet

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

Fifteen Years Online: Overall Internet Use in the United States

The percentage of Americans who use the Internet has reached 80 percent in the current Digital Future study. (Page 29)

Men and Women Online

In 2009, near-equal percentages of men and women go online. Internet use by women has increased more than use by men since the Digital Future Project began in 2000. (Page 31)

Age and the Internet

Not surprisingly, Internet use increases as age decreases. The highest percentage of Internet use is among Americans under age 18. Even at higher age levels, large percentages of Americans use the Internet; for example, 40 percent of those age 66 and older go online -- a level that has increased from 29 percent in 2000. (Page 32)

Hours per Week Online

The amount of time that Internet users spent online has grown in each year of the Digital Future studies, and has now surpassed an average of 17 hours per week. (Page 33)

Hours per Week Online: Light Users vs. Heavy Users

The Digital Future study found very large differences between the online hours of heavy users and light users. Light users spent an average of 2.8 hours per week online, compared to heavy users who average 42 hours a week online. (Page 33)

Using The Internet At Home: Hours Per Week

Internet use at home continues to increase. Internet use at home averages 10.1 hours per week -- more than triple the number in 2000. (Page 34)

Working Computers in the Home

The percentage of homes with three or more continues to increase. Now, 24 percent of American households have at least three computers. Not surprisingly, the percentage of households with no computers continue to decline; in the current study only 15 percent of homes in America do not have a computer. (Page 40)

Laptop Ownership

Ownership of laptops or notebook computers has risen dramatically since 2003, when this question was first asked in the Digital Future Project. In only five years, laptop ownership has increased 300 percent, and now represents 55 percent of households. (Page 41)

The Internet at Work

The number of hours that Internet users are online at work increased for the third year in a row in the Digital Future Project, and has now reached a new peak at 11.6 hours per week. (Page 42)

The Internet At Work: Active Use

Internet users in the current study are actively going online an average of 8.3 hours per week at work -- up almost one hour over 2007. (Page 43)

The Internet at Work: Non-Work Activities

Half of Internet users who go online at work said they go online sometimes or often for non-work related reasons, among them general Web surfing, chatting, instant messaging, and reading and writing e-mails. (Page 43)

Using The Internet at Home for Work

Fifty-seven percent of respondents who use the Internet at work said they sometimes or often go online at home for their jobs. (Page 44)

Productivity and The Internet At Work

The percentage of users who said the Internet at work makes them more productive remains high in the current Digital Future Project, with 68 percent of users who go online for their jobs saying that Internet access at work improves their productivity somewhat or a lot. While only a small percentage of users said that Internet access at work has “worsened somewhat” their productivity, that percentage has increased for the second year in a row. (Page 45)

Home Page Choices

The percentage of Internet users who use a search engine for their home page continued to grow in the current Digital Future study. Twenty-two percent of Internet users use a search page such as Google. The percentage of users who start their online access with a portal such as Yahoo, MSN, or America Online also grew in the current study. (Page 46)

Internet Connection At Home: Modem, Broadband, Cell Phone

Internet access through a broadband connection is now by far the dominant form of online service at home. Broadband use is now approaching 80 percent of Internet users -- more than double the level of five years ago, and eight times the percentage from the first year of the Digital Future Project in 2000. Access to the Internet by phone modem has dropped to less than 20 percent of Internet users (16 percent). (Page 48)

Broadband: Is It Always On?

In the homes of a large majority of broadband users, the Internet is “always on.” Two-thirds of home Internet users (67 percent) keep their broadband connection turned on most of the time while they are at home. Only 20 percent do not, down slightly from 2007 (the first year this question was asked). (Page 50)

Do You Use a Wireless Connection at Home?

Seventy-two percent of users with laptops at home said they use a wireless connection to that computer (Page 51)

Using Wireless Connections at Home: Where is it Used?

Sixty-four percent of users with laptops reported that they use their wireless connection in the living room, while 59 percent said the bedroom. (Page 51)

Internet Access by Cell Phone and Wireless Computer

Using cell phones and wireless computers to go online continues to increase, reaching their highest levels in the Digital Future Project. (Page 52)

Communication Technology: How Does It Affect The World?

Internet users and non-users continue to express strongly contrasting views about the impact of new communication technology on the world. While 58 percent of Internet users in the current study said that communication technology makes the world a better place, only 44 percent of non-users express the same view. (Page 56)

Internet Non-Users**Internet Non-users: Were They Ever Online?**

Of the 20 percent of Americans who are not currently using the Internet, more than one-third (35 percent) had previously gone online, and had used the Internet for an average of 3.3 years before stopping. (Page 60)

Internet Non-Users: Reasons For Not Being Online?

The most common reason for not using the Internet was “no interest” or “not useful” -- cited by 30 percent of all non-users -- the first time that explanation has been the most-cited reason. In second place, and close behind “lack of interest,” is “no computer” or “no Internet connection.” (Page 61)

“Internet Dropouts”: Exploring Why Users Stop Going Online

“Internet dropouts” -- those who previously used the Internet but no longer go online -- continue to report a variety of reasons for remaining non-users. The responses of Internet dropouts shifted significantly in the current Digital Future study. (Page 62)

Where Did Dropouts Previously Access the Internet?

A near-majority of Internet dropouts in the current study (49 percent) were previously home users, while smaller percentages used the Internet at work (26 percent), or other locations. (Page 63)

Internet Non-Users: Will They Go Online?

Only 36 percent of Internet non-users in the current study said they are somewhat likely or likely to go online within the next year -- down from 46 percent in 2007 and the lowest percentage in the eight years of the Digital Future studies. (Page 65)

Internet Dropouts: Will They Go Back Online?

The percentage of Internet dropouts in the current Digital Future study who said they will go back online increased substantially over 2007, and is now nearly half (48 percent) of former users, reversing a downward trend that began in 2006. (Page 66)

Media Use And Trust**Views about Sources of Information**

The 80 percent of Americans who go online consider the Internet to be their most important source of information -- this over television, radio, and newspapers. The Digital Future Project found that 79 percent of users said the Internet was either an important or very important source of information for them -- higher than the figure reported for television (68 percent), newspapers (60 percent), or radio (58 percent). (Page 68)

Information Online: Is It Reliable?

Forty-two percent of Internet users said that most or all of the information online is generally reliable. (Page 71)

Reliability of Information Online: Views of Internet Users

Comparing the views of Internet users over the eight years of the Digital Future studies shows a second year of decline in the percentage of those who think that most or all of the information online is reliable. In 2006, 56 percent of users said that most or all of the information online is reliable; that percentage declined to 46 percent in 2007 and 42 percent in the current study -- the lowest level thus far in the Digital Future Project. (Page 72)

Web Sites: Which Are Reliable And Which Are Not?

In the current Digital Future Project, 81 percent of Internet users said that government Web sites were generally reliable and accurate -- about the same in 2007. Faith in news pages posted by established media (such as nytimes.com and cnn.com) decreased, and is now at the lowest level yet reported in the Digital Future studies. (Page 76)

Search Engines: Reliability

The percentage of Internet users who said that most or all of the information provided by search engines such as Google is reliable and accurate rose slightly in the current study after a decline in 2007. (Page 80)

TV Viewing and Time-Shifting

Thirty-one percent of respondents said they record television shows with a VCR or digital video recorder such as Tivo or those offered by cable or satellite TV providers -- compared to 29 percent in 2007. (Page 82)

Using Offline Media

Most Internet users are multitaskers. The percentage of users who said they participate in offline activities while they are online -- listening to music, watching TV, or talking on the telephone, among others -- has increased to 83 percent, the highest level thus far in the Digital Future studies. (Page 82)

Trends In Online Media Use

Looking at the use of online media, Internet users in the current Digital Future study reported increases in their time involved in most online media. Users reported spending the largest amount of time spent playing online video games and listening to online radio. In what could be considered evidence of the ongoing decline of printed newspapers, users reported large increases in weekly reading of online newspapers, now at the highest level thus far in the seven Digital Future studies in which this question was asked. Other peak levels for the Digital Future studies were also reported for reading online magazines, and watching online television and online movies. (Page 84)

Does Online Content Lead to Cancelled Print Subscriptions?

Twenty-two percent of Internet users said they stopped a subscription for a newspaper or magazine because they now get the same or related content online. (Page 86)

Would You Miss The Print Edition Of Your Newspaper?

Even though Internet users reported devoting significant amounts of time to reading online newspapers, when asked if they would miss the print edition of their newspaper if it were no longer available, 61 percent those who read newspapers offline agreed -- up from 56 percent in 2007. (Page 86)

Surfing The Web

Web surfing -- exploring the Internet without a specific destination -- continues to be a favorite activity for Internet users. In the current Digital Future study, 80 percent of Internet users sometimes or often go online without a specific destination in mind, up marginally from 78 percent in 2007. (Page 87)

Posting Information Online: Blogs, Photos, and Maintaining Personal Web Pages

Distributing content created by Internet users on a blog, through a display of photos, or on a user's personal Web page, continues to increase. In the current Digital Future study, 44 percent of Internet users said they post photos online -- four times as many as in 2003. The percentage who keep a personal blog, although still less than one-quarter of users, increased substantially in the current study. (Page 93)

Consumer Behavior

Who Is Buying Online?

Almost two-thirds (65 percent) of Internet users also buy online. (Page 98)

Types of Online Purchases

The most popular online purchases are clothes or gifts, bought by 61 percent of Internet users who buy online, followed closely by books (60 percent). (Page 99)

Online Purchasing Frequency

The average number of annual online purchases for Internet users age 18 and above decreased slightly in the current Digital Future study, down from the peak number in 2007. (Page 100)

Privacy Concerns When Buying Online

Privacy and security while online have been reported as major concerns in each of the eight Digital Future studies. Almost all respondents continue to report some level of concern about the privacy of their personal information when or if they buy on the Internet. The total percentage of respondents who reported some level of concern about the privacy of personal information (somewhat, very, or extremely concerned) reached 93 percent -- almost as high as the 95 percent in 2007. (Page 101)

Privacy: Comparing Concerns Among Non-users, Light Users, Heavy Users

Looking at the views of non-users, light users, and heavy users shows that concerns about privacy of personal information decreases as Internet use increases. Looking at those who are very concerned or extremely concerned, non-users reported the largest percentage (76 percent), followed by light users (58 percent), and heavy users (42 percent). (Page 102)

Privacy Concerns: Internet Non-Purchasers Vs. Purchasers

Internet purchasers reported much lower percentages of the highest levels of concern compared to non-purchasers. (Page 103)

Credit Card Information: Concerns About Security

Concerns about credit card security when or if buying online have been high among all respondents in all of the Digital Future studies. Among all respondents in the current study, 93 percent reported some level of concern about credit card security when or if they buy online -- about the same as the 94 percent reported in 2007. (Page 105)

Buying Online: Effects on Traditional Retail Purchasing

A large and growing percentage of online purchasers continues to report that their purchasing online has reduced their buying in retail stores. In the current study, 69 percent of Internet users who buy online said that online purchasing has reduced their buying in traditional retail stores somewhat or a lot -- up marginally from 67 percent in 2007. (Page 111)

Browsing For Products: Retail Stores Vs. The Internet

Very large percentages of Internet users said they browse in stores and then buy online, and vice versa.

In the current Digital Future Project, three-quarters of Internet purchasers said they sometimes or often browse in traditional retail locations and then buy online – up from 71 percent in 2007. (Page 113)

Views About Risking Privacy by Going Online

Internet users continue to agree that people who go online put their privacy at risk, however at a declining rate. (Page 115)

Do You Click on Web Advertisements?

In a series of new questions in the current Digital Future Project, Internet users express strong negative views about advertising online -- both through their limited use of it and in their opinions about it. More than half of Internet users (52 percent) said they never click on Web advertisements, and only six percent do so sometimes or often. Users are even less enthusiastic about purchasing decisions based on Web advertisements; 61 percent of Internet users said they never buy products that they learned about from a Web advertisement. (Page 118)

Web Advertising: Information Value

Internet users consider traditional advertising more informative than Web advertising; when asked about the statement, “I find Web advertising to be more informative than traditional advertising,” only 12 percent agreed with that statement. (Page 119)

Do You Find Web Advertising Annoying?

Summing up views about online advertising in another new question, 70 percent of users agreed or strongly agreed with the statement, “I find Web advertising annoying.” (Page 119)

Online Advertising vs. Paying for Internet Content

Although Internet users express strong negative views about advertising online, they prefer Web ads to support Internet pages rather than personally paying for content. Fifty-one percent of users agreed or strongly agreed that they prefer having free access to online content that has advertising accompanying it (similar to television shows on commercial broadcasts) rather than having to pay for the content. (Page 120)

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

Almost everyone who goes online uses e-mail (97 percent of all Internet users). (Page 122)

Regular contact by e-mail

E-mail users maintain weekly personal e-mail contact with an average of seven people in the current study, down from the peak of nine in 2006. Forty-nine percent of e-mail users said they maintain personal contact by e-mail on a weekly basis with five or more people. (Page 123)

How Quickly Should Users Reply To E-mail?

A growing percentage of e-mail users said they expect a quick response to their online communications. Thirty-six percent of e-mail users said they expect a response “as soon as possible” -- the highest percentage who gave this response to date. Sixty-three percent said they expect a response in one day or as soon as possible -- also a high level for the studies. (Page 125)

Phishing Victims

A slightly higher percentage of e-mail users in the current study compared to 2007 said they had been victims of phishing (being scammed into surrendering private information to an identity thief). (Page 128)

The Internet And Social Relationships

A growing percentage of Internet users said the Internet is important in helping to maintain social relationships. Fifty-two percent of users said the Internet was important or very important in helping them maintain their social relationships -- up from 45 percent in 2007. (Page 130)

Does The Internet Help Users Improve Their Relationships?

A smaller percentage of Internet users said being online has helped improve relationships with important people in their lives -- 35 percent of users in the current study agreed with this statement, compared with 41 percent in 2007. (Page 130)

Instant Messaging And Social Relationships

Although instant messaging continues to be one of the most popular forms of communication within some age groups, overall a relatively small percentage of Internet users 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, and 61 percent of users said instant messaging is not important. (Page 132)

Time Spent Socializing With Friends and Family

The percentage of Internet users in the current study who said that they spend about the same face-to-face time with friends since being connected to the Internet remained unchanged from 2007, after two years of declines. (Page 134)

Are You Ignored Because of Television or the Internet?

Significant percentages of Internet users said they were sometimes or often ignored because another member of the household spends too much time online (44 percent). An even higher percentage (48 percent) said they were ignored because others spend too much time watching TV. (Page 136)

Internet Use and Contact with Others

In general, Internet use has no effect or a positive effect on contact with key groups in users' lives, such as family, friends, and people who share hobbies, political beliefs, religion, and professional interests. (Page 137)

Internet Use and Contact with Others: Specific Groups

Significant percentages of Internet users in the current Digital Future study said that going online has increased their contact with friends, family, people who share their hobbies, and people who share their profession. (Page 138)

Social Effects: Online Communities**Are You A Member Of An Online Community?**

Fifteen percent of Internet users reported that they are members of an online community -- no change over 2007, and still the peak level so far in the studies. (Page 140)

Membership In Online Communities: How Long?

Online community members continue to report increasing average time as members of those communities compared to 2006. (Page 141)

Types of Online Communities

The largest percentage of users who said they were in an online community said their community is related to their hobbies. (Page 141)

What Do You Do When You are Logged into Your Online Community?

The largest percentages of members of online communities spend their time in those communities looking for information (64 percent) or posting messages (63 percent) -- both high figures for the three years this question has been asked in the Digital Future studies. (Page 142)

Online Communities: Are They Useful And Important?

A smaller percentage of online community members in the current Digital Future study compared to 2007 said their online communities were useful and important. (Page 143)

Participation In Online Communities: Does It Affect Involvement in Offline Communities?

Most online community members said that their participation in those communities does not affect their involvement in offline communities. However, a small but growing percentage said that this involvement has decreased their involvement in offline communities somewhat or a lot. (Page 144)

Online Communities: Are they Beneficial for Members?

For the second year in a row, the percentage who find a large amount of benefit from their online community declined. (Page 147)

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

A declining percentage of online community members said they meet in person with members of their online communities -- at 42 percent, the lowest level thus far. (Page 148)

Online Communities And Social Causes**How much time do you spend participating in clubs or voluntary organizations?**

In general, Internet users reported spending more time in clubs or volunteer organizations than non-users -- a finding consistent in all four years this question has been asked in the Digital Future studies. (Page 152)

Participation In Online Communities Related To Social Causes

Members of online communities reported high levels of participation in the social causes and non-profit organizations they are involved with on the Internet. Eighty-one percent of online community members in the current study said they use the Internet to participate in communities related to social causes -- up from 75 percent in 2007. (Page 153)

The Internet as an Information Source about Social Causes

The percentage of online community members who said the Internet helps them stay informed about social causes remains high in the current study (91 percent). (Page 154)

Do Online Communities Encourage Members to Participate in Social Causes?

Seventy-two percent of online community members said that they are participating in social causes that are new to them since their involvement in online communities began. (Page 155)

Social Activism And Participation In Online Communities

A larger percentage of users in the current Digital Future study said their activism has increased since they began participating in online communities compared to 2007. (Page 156)

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

Although large percentages of online community members said they participate in social causes online, only 17 percent said that they are involved more often in offline social issues as a result of their online participation. (Page 156)

Online Communities: Participation In Non-Profit Organizations

A larger percentage of online community members reported that their participation in non-profit organizations has grown since they first started using the Internet. (Page 157)

Online Communities: Are They as Important as the Real World?

A smaller percentage of members of online communities (42 percent) feel as strongly about their online communities as they do about their real-world communities. (Page 158)

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

For the fourth year in a row, the percentage of adults who said that the children in their households spend too much time using the Internet has increased -- in the current study, to 28 percent of respondents -- another new high for the Digital Future Project. A much larger and growing percentage of adults said the children in their households spend the right amount of time online -- a slight increase after the response to this question reached its lowest level in 2007. (Page 161)

Television Viewing: The Right Amount Of Time For Children?

In comparison to adults' views of the amount of time children spend online, a much higher percentage said that the children in their households spend too much time watching television. (Page 162)

The Internet and Schoolwork: Children's Views

As in all of the Digital Future studies, children and adults responding in the current survey continue to express contrasting opinions about the value of the Internet for schoolwork. In the current study, for the first time all Internet users age 18 and under said that going online plays some level of importance in their schoolwork; no respondents said the Internet was not at all important. However, the percentage citing the highest levels of importance has declined for three years in a row. (Page 163)

Internet Use And School Grades: The Adults' View

As in the six previous years of the Digital Future Project, adults take a different view than children of the Internet's value for schoolwork. Large percentages of adults continue to believe that going online has no effect on grades, and the adult view of the Internet as a negative influence on grades is growing. (Page 164)

Internet Use And Television Viewing: Use As Punishment Tools

Punishing children by denying access to the Internet or television declined marginally. (Page 165)

Children Participating In Online Communities: The Adult View

A slightly larger percentage of adults in the current Digital Future study compared to 2007 are comfortable with the participation of the children in their households in online communities. (Page 166)

Children And Time Spent With Friends

Eighty-seven percent of adults said that the children in their household spend the same amount of time or more time with friends since using the Internet -- the same overall percentage as in 2007. The percentage of adults who said that their children spend less time with friends remains at its high point in the Digital Future Project. (Page 167)

Online Predators: Are They A Threat To Children?

More than half of adults (54 percent) said that online predators are a threat to the children in their households. (Page 168)

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

Although the use of online technology in politics grew dramatically during the most recent presidential election, the percentage of respondents who think that the Internet has become important for political campaigns remains unchanged from 2007. (Page 170)

Is The Internet Important In Political Campaigns? (Users vs. Non-users)

Among Internet users, 61 percent agree or strongly agree that the Internet has become important for political campaigns -- down marginally from 64 percent in 2007. (Page 171)

Is the Internet A Tool For Political Influence?

Less than one-quarter of all respondents (23 percent) agree that the Internet can encourage public officials to care more about what people think. (Page 172)

The Internet: A Tool for Understanding Politics

Half of all respondents agree or strongly agree that the Internet allows people to better understand politics. (Page 173)

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

When asked if using the Internet gives people more of a say in what government does, 25 percent of all respondents age 16 or older agreed or strongly agreed. (Page 174)

The Internet as a Tool to Help Gain Political Power

Thirty percent of all respondents agree or strongly agree that by using the Internet, people like them can have more political power. (Page 175)

The Internet and Information-Gathering during Election Campaigns

The percentage of Internet users who went online to gather information during the most recent significant election in their area increased to 37 percent of adult users in the current study. (Page 177)

Location of Election-Related Information Online

Internet users used a variety of sources to find information about candidates, with 70 percent using the Web sites hosted by traditional media (such as nytimes.com), and lower percentages using candidates' Web sites and portals such as Yahoo. (Page 177)

Election Information Online: Satisfaction Levels

Eighty-two percent of users who went online to gather information were satisfied with the election-related information they found on the Internet -- a marginal increase over 2007 but slightly lower than the peak of 87 percent in 2005. (Page 179)

Volunteering Online for Political Campaign Work

Two percent of Internet users said they volunteered over the Internet to work for a political candidate. (Page 180)

Voting Online

Slightly lower percentages of all respondents in the current Digital Future study (36 percent compared to 37 percent in 2007) agree or strongly agree that they would be interested in voting online. (Page 181)

The 2009 Digital Future Report

Surveying The Digital Future

Year Eight

Each year, the Digital Future Project explores more than 100 major issues in broad categories involving the impact of online technology in 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 and issues in this year's findings, see page 182.

Internet Users And Non-Users

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

After 15 years of Internet access, how have behavior and views about going online changed in the United States?

Do the views of “light users” (5 hours or less per week using the Internet) and “heavy users” (more than 24 hours per week using the Internet) differ?

* * * * *

Internet Access And Use

Project Year	2000	2001	2002	2003	2005	2006	2007	2008
--------------	------	------	------	------	------	------	------	------

Internet Access

Overall Internet Use

■ % of Americans who are Internet users	67	72	71	76	79	78	79	80
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Hours Online

■ Average numbers of hours online per week	9.4	9.8	11.1	12.5	13.3	14.0	15.3	17.3
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■ Average number of hours online at home per week	3.3	5.9	6.8	6.9	7.8	8.9	10.0	10.1
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■ Hours online per week from home, Year Eight (light users)*								2.1
--	--	--	--	--	--	--	--	-----

■ Hours online per week from home, Year Eight (heavy users)**								21.3
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* "light users" = 5 hours or less per week using the Internet

** "heavy users" = more than 24 hours per week on the Internet

Number of Years Online

1.5 years or less	.9%
More than 1.5 years to four years	6.4%
More than four years to eight years	24.9%
More than eight years to 10 years	30.7%
More than 10 years	37.2%

Project Year	2000	2001	2002	2003	2005	2006	2007	2008
--------------	------	------	------	------	------	------	------	------

The Internet at Work

■ % of Internet Users at Work	n/a	n/a	n/a	10.8	10.7	10.5	11	11.6
■ % of Users at Work with broadband Internet access	10	13	22	36	48	51	76	79

Online Purchasers

■ % of Internet users who buy online	45	51	40	43	46	51	67	65
■ Average number of annual purchases (online purchasers)	n/a	10.8	28.3	29.9	34.6	30.1	36.4	34.1

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

■ Clothes	61%
■ Gifts	61%
■ Books	60%
■ Travel Arrangements	57%
■ Videos/DVDs	48%
■ Electronic Goods/Appliances	47%
■ Software/Games	43%
■ Computers/Peripherals	43%
■ CDs	42%
■ Products for Hobbies	40%

America On The Internet

Americans who are Internet users **80%**

Internet users: average years online **10**

Internet connection by broadband **(2000)** **16%**
(2008) **79%**

Homes with at least three computers **24%**

Internet users who keep a blog
2003 **3%**
2008 **21%**

Does new communications technology make the world a better place?
(Internet users who said yes) **2000** **66%**
2008 **58%**

Internet users who select a Web portal as their home page
2005 **54%**
2008 **43%**

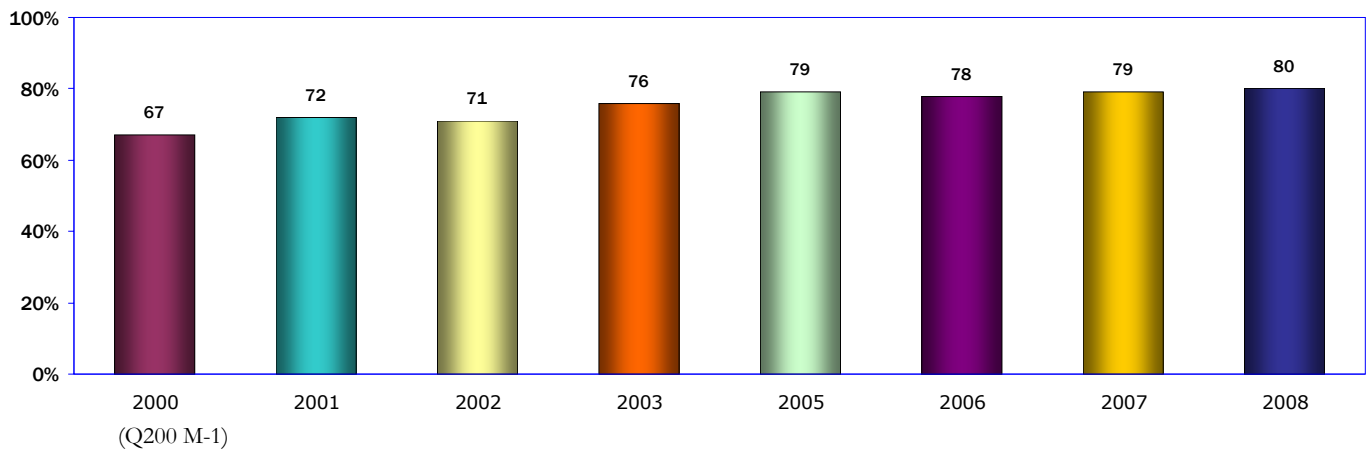
Fifteen Years Online: Overall Internet Use in the United States

How has Internet use changed in America during 15 years of going online?

In 1994, after public Web sites became generally available to the American public, approximately 15 percent of people in the United States were Internet users.*

That number increased to 67 percent in 2000 -- the first year of the Digital Future Project. The percentage who use the Internet has reached 80 percent of Americans in the current Digital Future study.

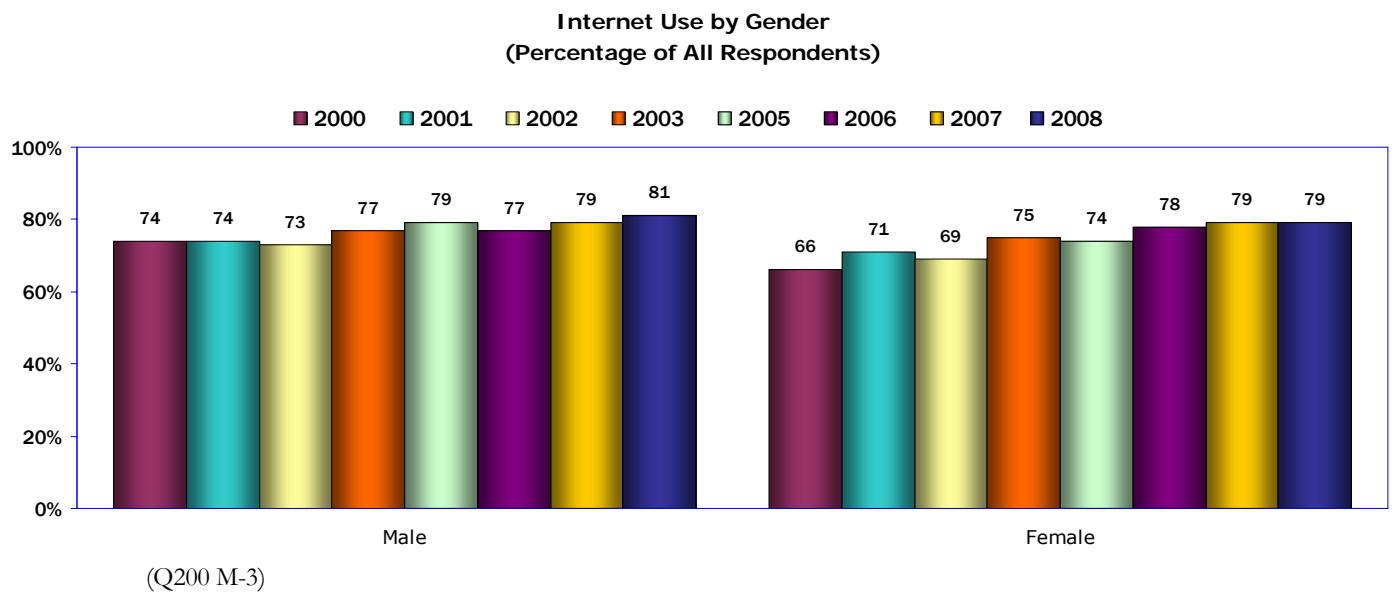
**Overall Internet Use
(Percentage of All Respondents)**



* Percentage based on studies conducted by several federal agencies and academic organizations.

Men and Women Online

In 2009, near-equal percentages of men and women go online. Internet use by women has increased more than use by men since the Digital Future Project began in 2000.

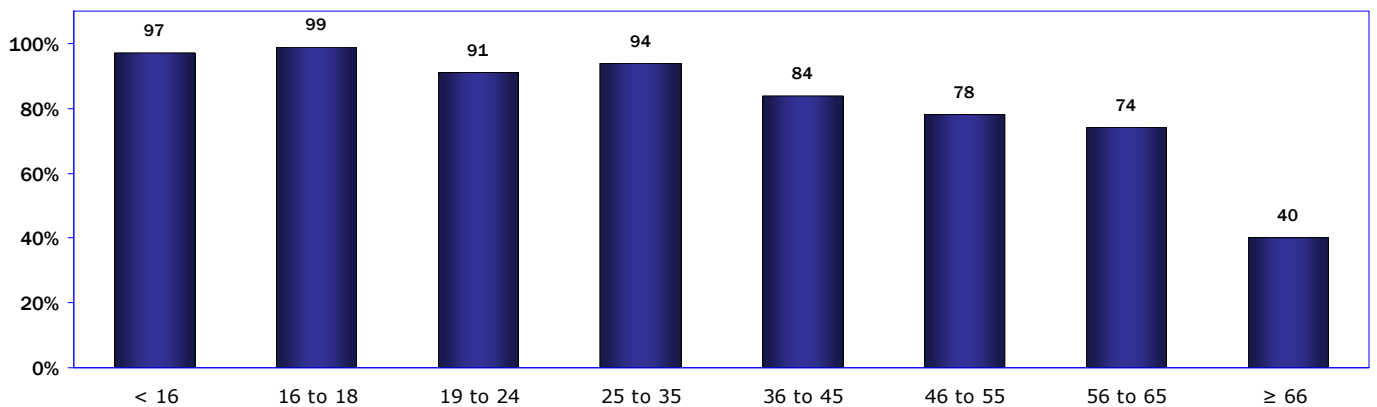


Age and the Internet

Not surprisingly, Internet use increases as age decreases. The highest percentage of Internet use is among Americans under age 18.

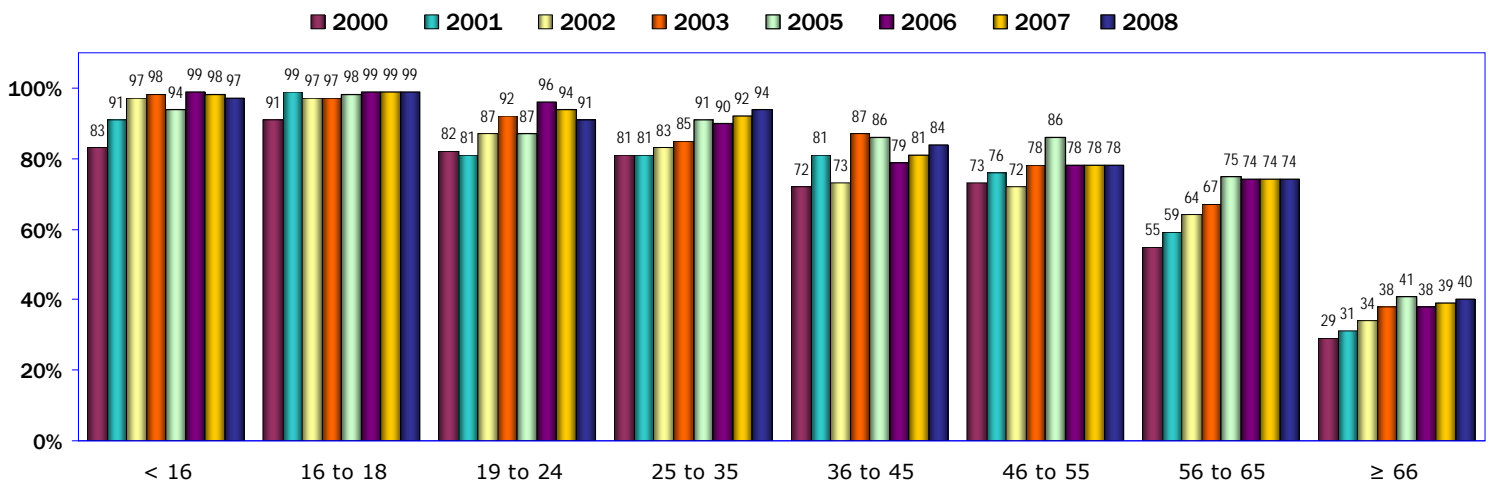
However, even at higher age levels, large percentages of Americans use the Internet; for example, 40 percent of those age 66 and older go online -- a level that has increased from 29 percent in 2000 (see lower chart).

Internet Use by Age
(Percentage of All Respondents)



(Q200 M-6)

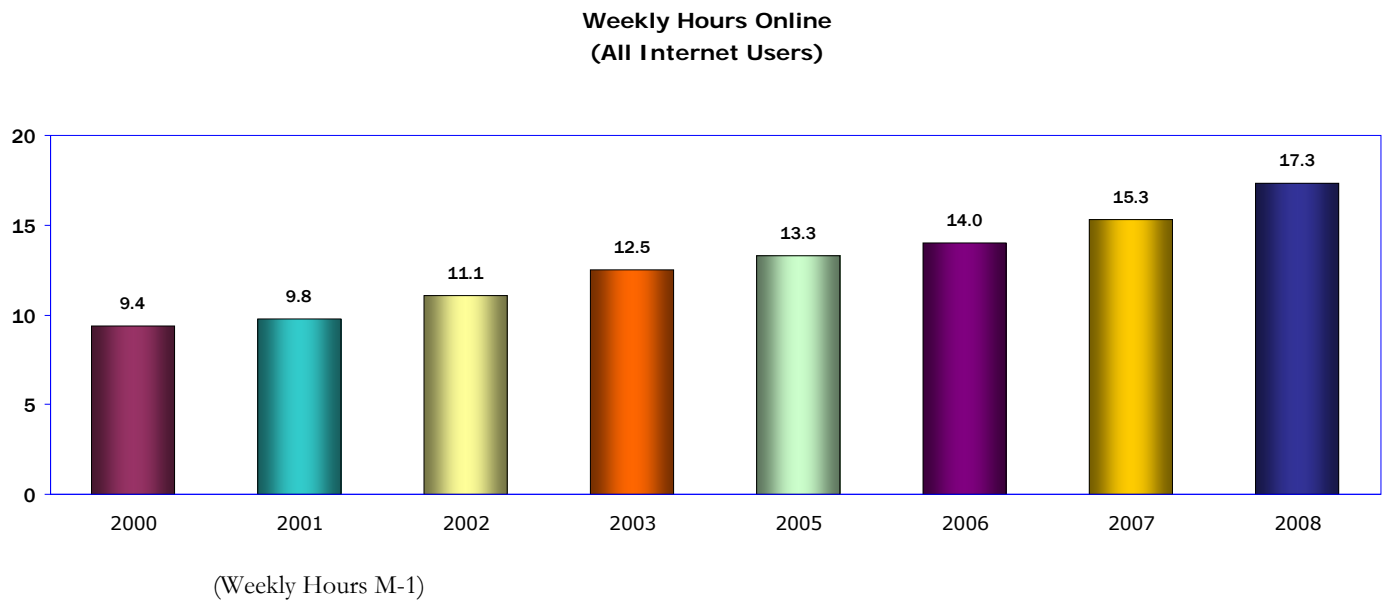
Internet Use by Age
(Percentage of All Respondents)



(Q200 M-7)

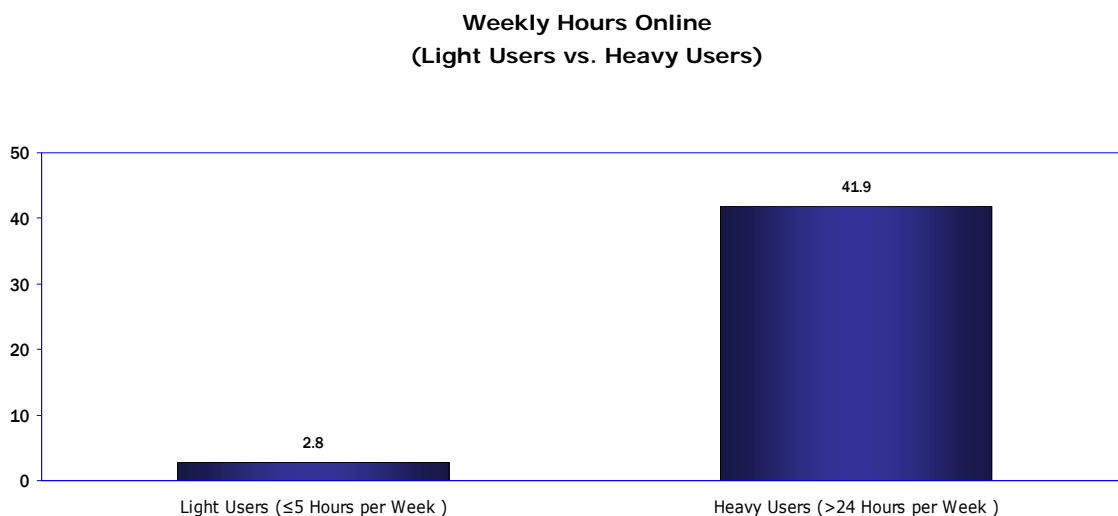
Hours per Week Online

The amount of time that Internet users spent online has grown in each year of the Digital Future studies, and has now surpassed an average of 17 hours per week.



Hours per Week Online: Light Users vs. Heavy Users

The Digital Future study found very large differences between the online hours of heavy users and light users Internet users. Light users spent an average of 2.8 hours per week online, compared to heavy users who average 42 hours a week online.



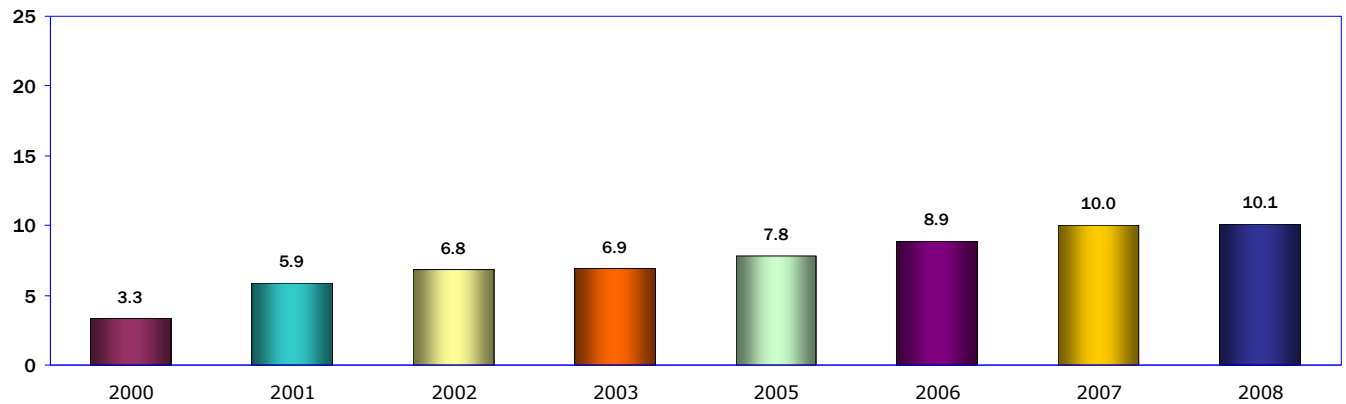
(Weekly Hours M-2)

Using the Internet at Home: Hours per Week

Internet use at home continues to increase.

Internet use at home averages 10.1 hours per week -- more than triple the number in 2000.

**Internet Use at Home: Hours per Week
(Internet Users)**

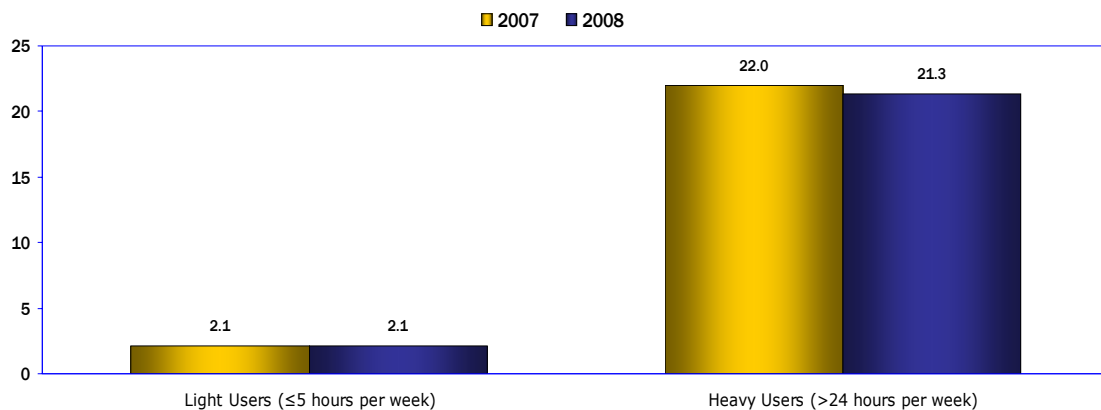


(Q350 M-1)

Using the Internet at Home: Hours per Week by Light Users and Heavy Users

Heavy Internet users continue to report much higher levels of Internet use at home -- but the time online reported by heavy users declined slightly in the current Digital Future study.

**Internet Use at Home: Hours per Week
(Light Users vs. Heavy Users)**



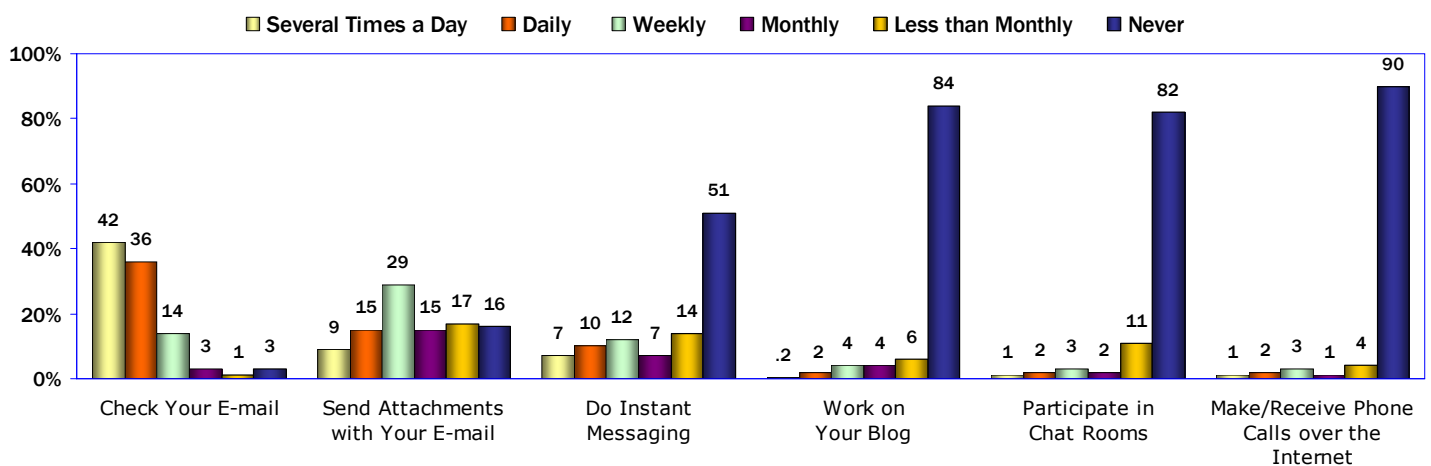
(Q350 M-2)

Activities on the Internet: Communication

How often do Internet users participate in online communication, such as e-mail, instant messaging, blogs, chat rooms, and online telephone calls?

In the current Digital Future Project, 92 percent of Internet users reported that they checked e-mail at least weekly (defined as weekly, daily, or several times a day). Fifty-three percent send attachments with their e-mail at least weekly, and 29 percent used instant messaging at least weekly.

Internet Activities: Communications
(Percentage of Internet Users)

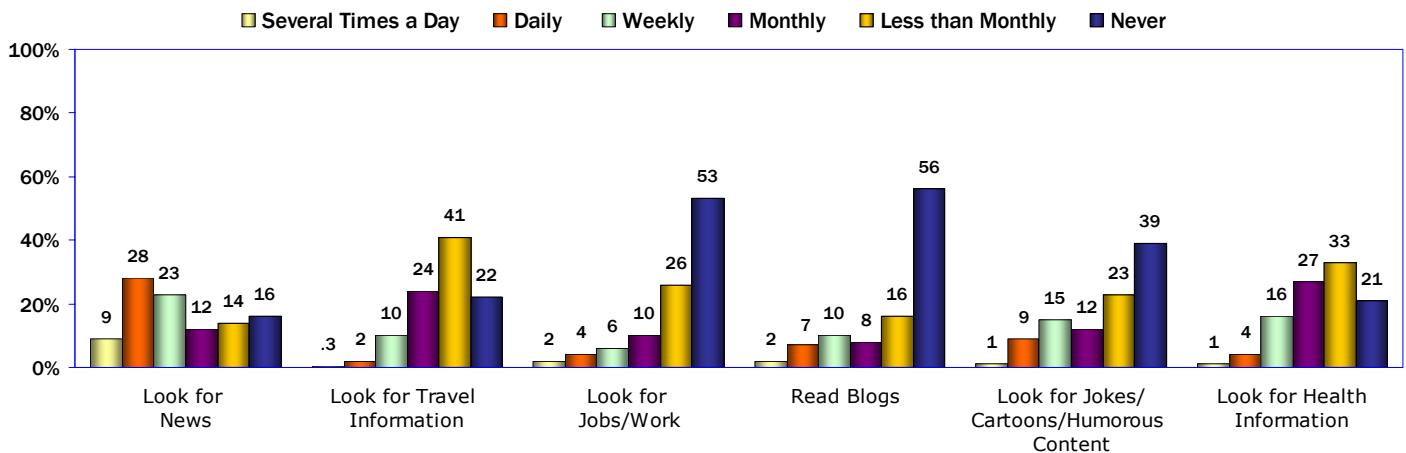


(Q708a M-1)

Activities on the Internet: Information-Gathering

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

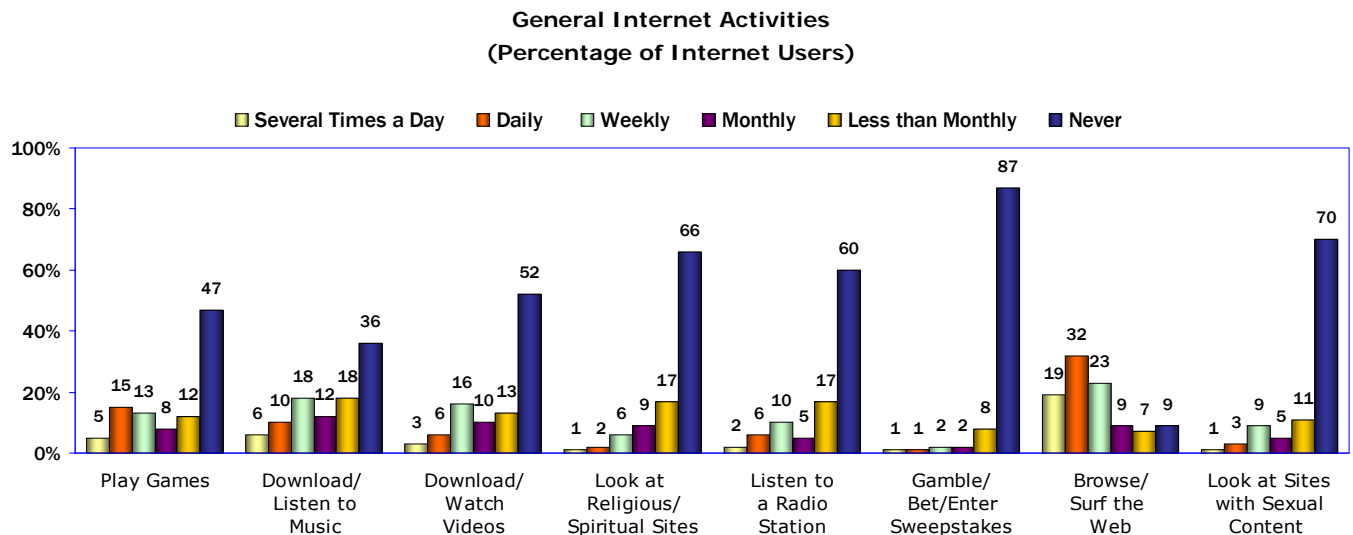
Internet Activities: Information-Gathering
(Percentage of Internet Users)



(Q708B M-1)

Activities on the Internet: General Projects

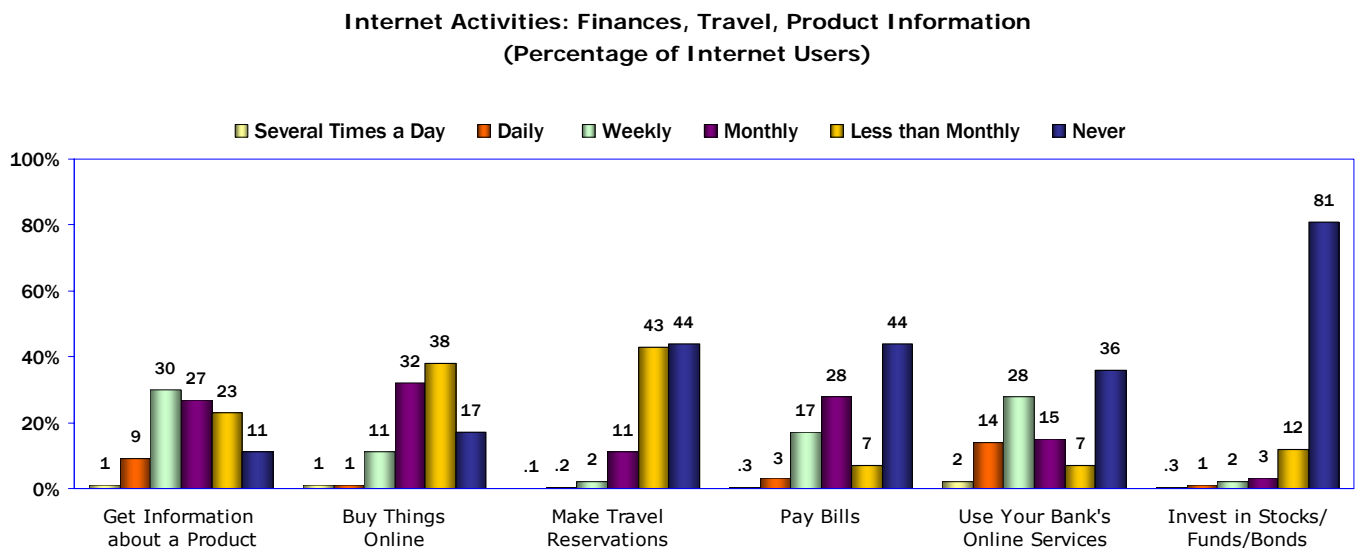
Seventy-four percent of Internet users browse the Internet at least weekly; 33 percent play games online, and 34 percent download or listen to music with that frequency.



(Q708C M-1) (Data is for all users except for those who look at sites with sexual content, which is users age 18 or older.)

Activities on the Internet: Finances, Travel, Product Information

Forty percent of Internet users go online at least weekly to get product information, while 44 percent use online banking or other financial services with that frequency.



(Q708D M-1)

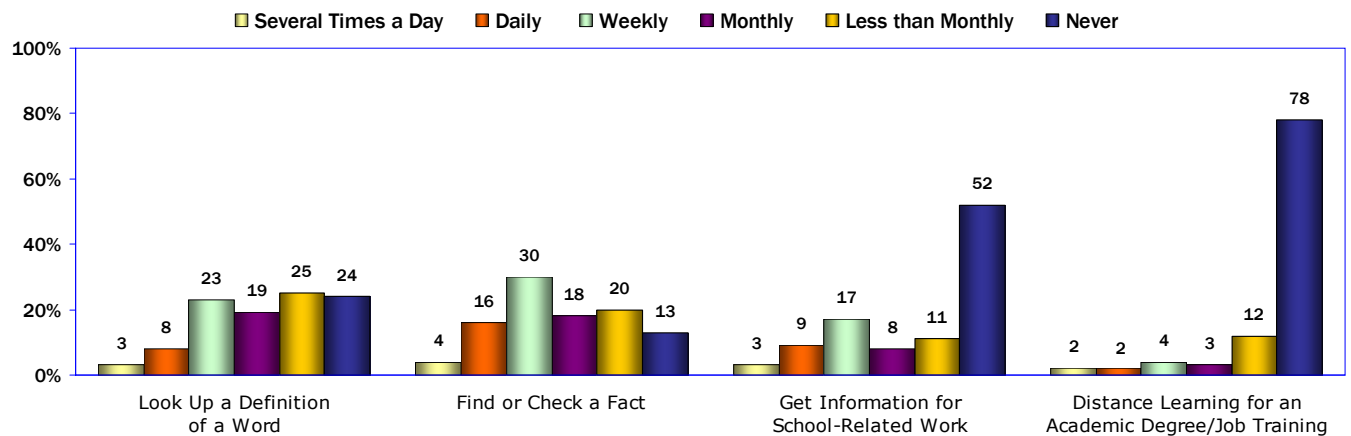
Activities on the Internet: Research and Education

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

Fifty percent of Internet users said they go online to find or check a fact at least weekly, and 20 percent do so at least daily.

Thirty-four percent of users go online at least weekly to look up the definition of a word, and 11 percent do so at least daily.

**Internet Activities: Information-Gathering
(Percentage of Internet Users)**

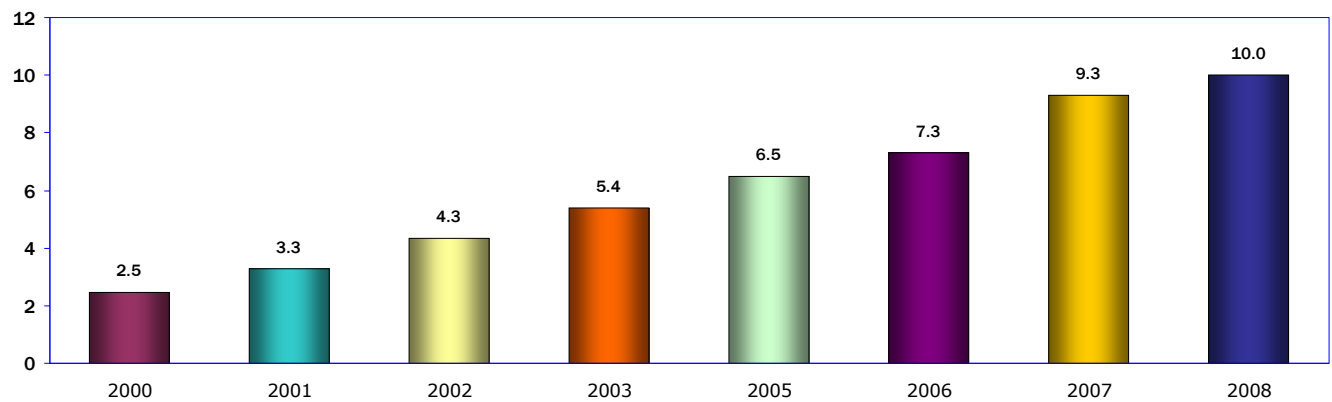


(Q708E M-1)

Internet Use: How Many Years?

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 10 years of online experience.

**Average Years of Internet Experience
(Internet Users)**

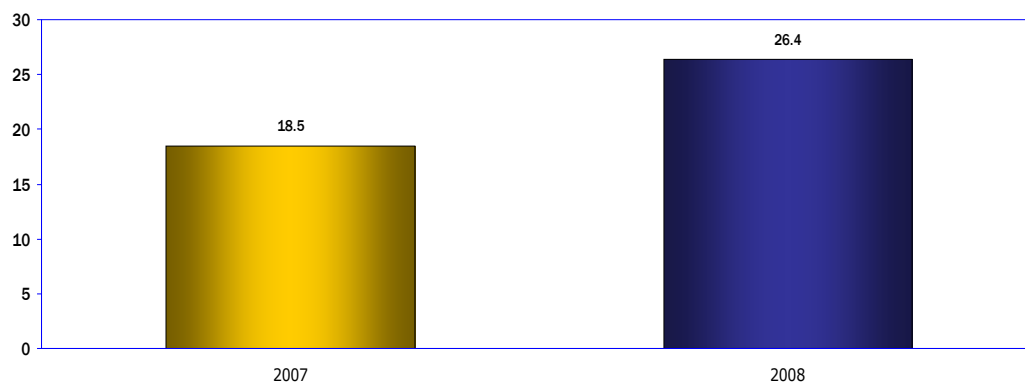


(Q210 M-2)

Internet Use from a Wired PC away from Home, Work, or School

Internet users in the current study reported increased time using the Internet from a wired PC away from their home or work -- almost a half-hour a week from a variety of locations that have a wired PC, such as Internet cafes, other people's homes, libraries, or other locations.

**Internet Use from a Wired PC away from Home, Work, or School
(Internet Users: Average Minutes Per Week)**



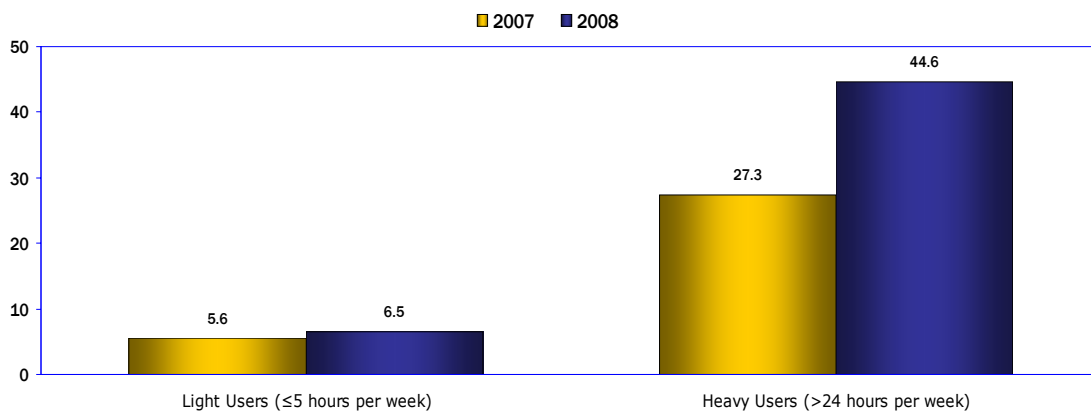
(Q412 JC-1)

Internet Use with a Wired PC away from Home or Work: Light Users vs. Heavy Users

Heavy Internet users (more than 24 hours per week) reported much more time online with a wired PC away from home or work compared to light users (5 hours per week or less).

In the current study, heavy users spend 38.1 more minutes per week than light users online with a wired computer at a location other than home or work; in 2007, the difference was 21.7 minutes.

**Internet Use from a Wired PC away from Home, Work, or School
(Average Minutes Per Week)**



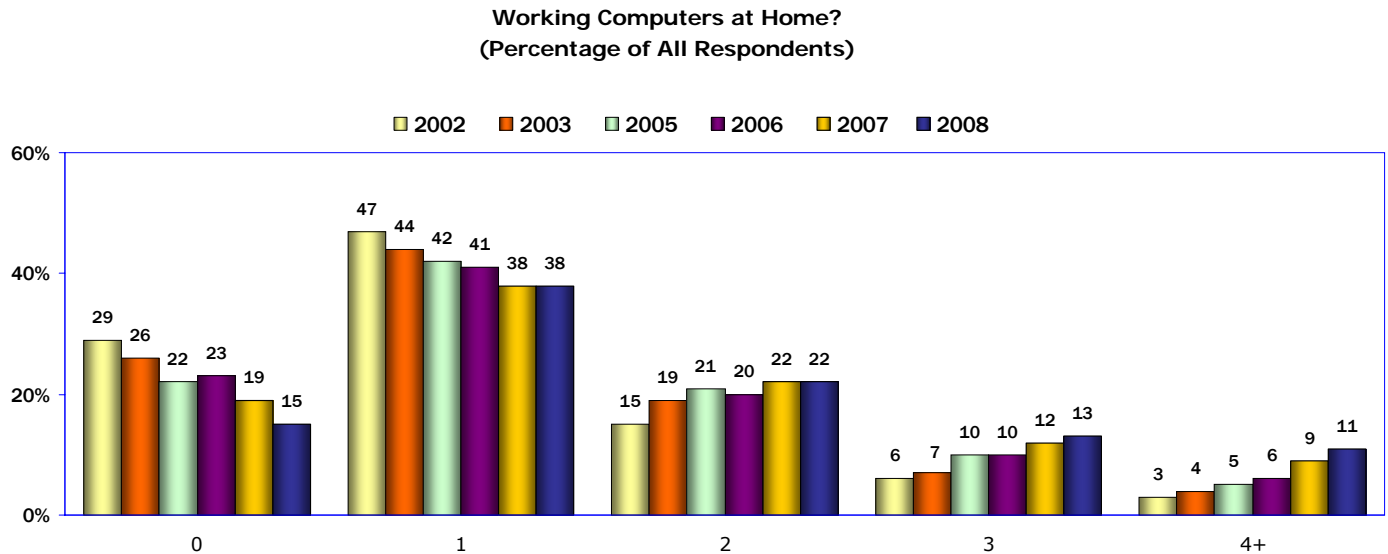
(Q412JC-2)

Working Computers in the Home

In the current Digital Future study, the percentage of households with one or two computers remained stable compared to 2007, with 38 percent of households reporting only one computer and 22 percent reporting two computers.

The percentage of homes with three or more continues to increase. Now, 24 percent of American households have at least three computers. Compare this to 2002, when this question was asked for the first time in the study; only six percent of households had three or more working computers.

Not surprisingly, the percentage of households with no computers continues to decline; in the current study only 15 percent of homes in America do not have a computer.

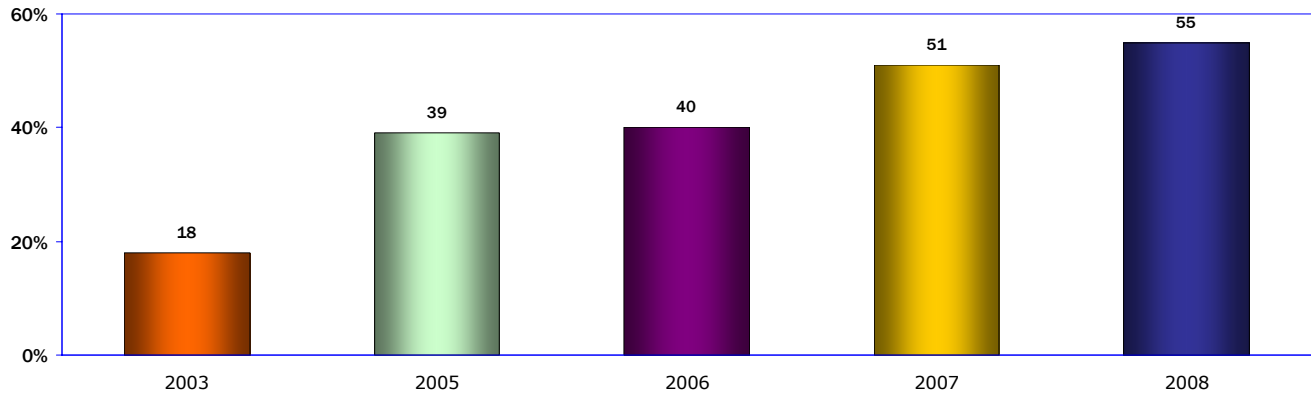


(Q130 JC-2) (Responses do not include PDAs, video games, Web TV, cell phones, or other electronic devices).

Laptop Ownership

Ownership of laptops or notebook computers has risen dramatically since 2003, when this question was first asked in the Digital Future Project. In only five years, laptop ownership has increased 300 percent, and now represents 55 percent of households.

Laptop Ownership at Home
(Respondents with One or More Computers at Home)

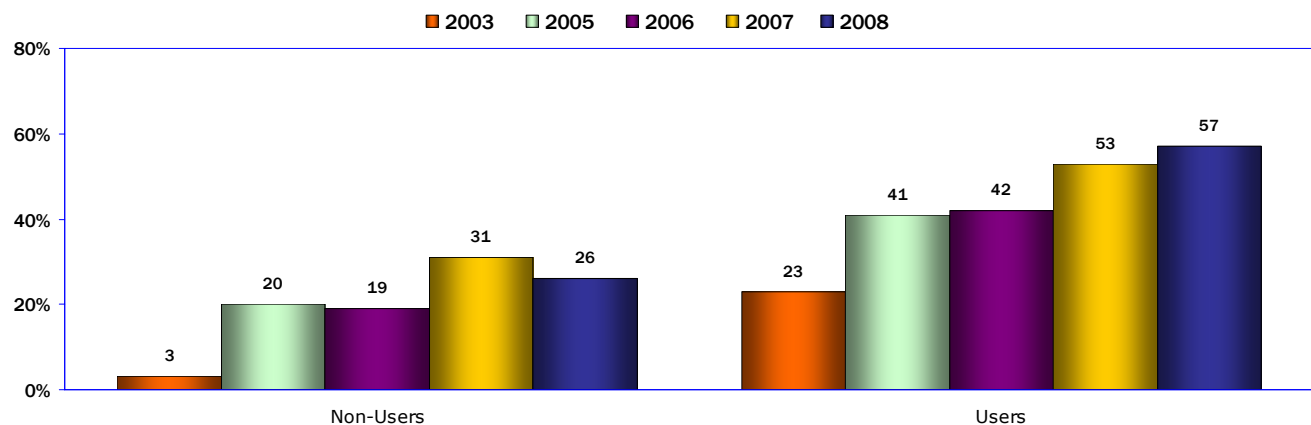


(Q134 JC-2)

Laptop Ownership: Non-users vs. Users

The percentage of households with Internet users that have a laptop continues to increase -- in the current study to 57 percent. However, significant percentages of Internet non-users -- 26 percent in the current study -- also use laptops.

Laptop Ownership at Home
(Respondents with One or More Computers at Home: Internet Non-Users Vs. Users)

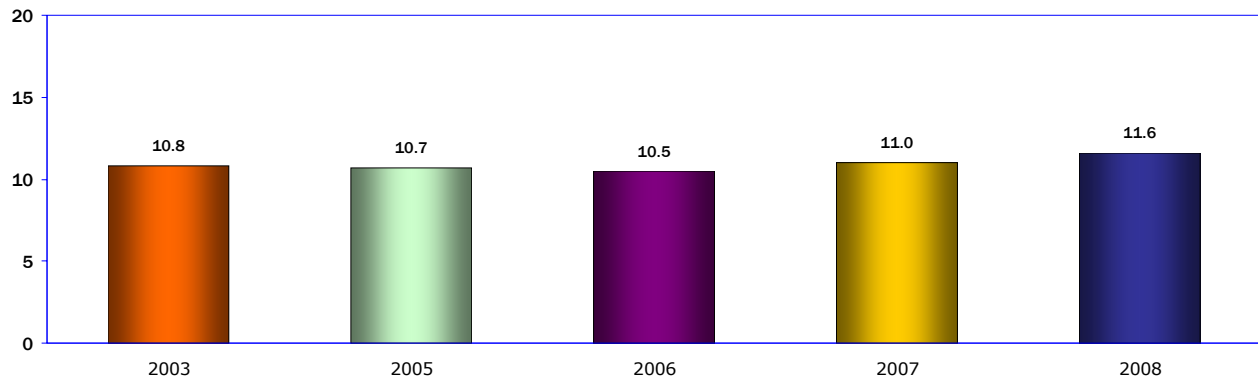


(Q134 JC-4)

The Internet at Work

The number of hours that Internet users are online at work increased for the third year in a row in the Digital Future Project, and has now reached a new peak at 11.6 hours per week.

**Internet Use at Work, Average Hours Per Week, Not at Home
(Internet Users Who are Employed)**

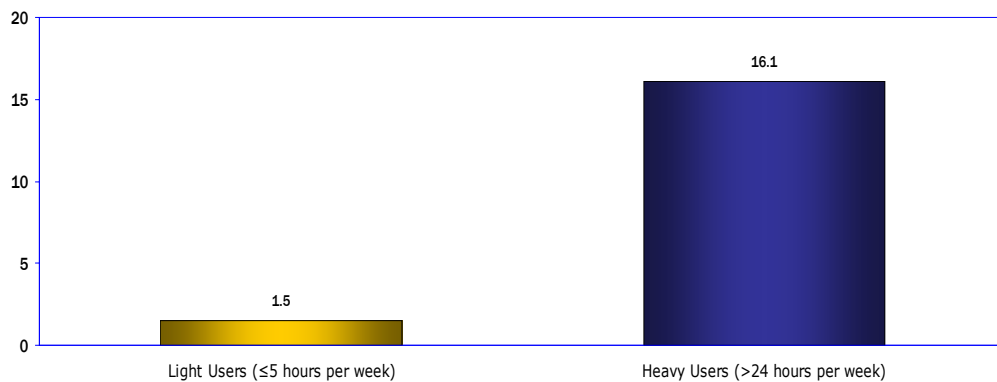


(Q370 M-2)

The Internet at Work: Light Users vs. Heavy Users

Heavy Internet users reported greater than ten times more hours of Internet use at work compared to light users.

**Internet Use at Work, Average Hours Per Week, Not at Home
(Internet Users Who Go Online at Work)**

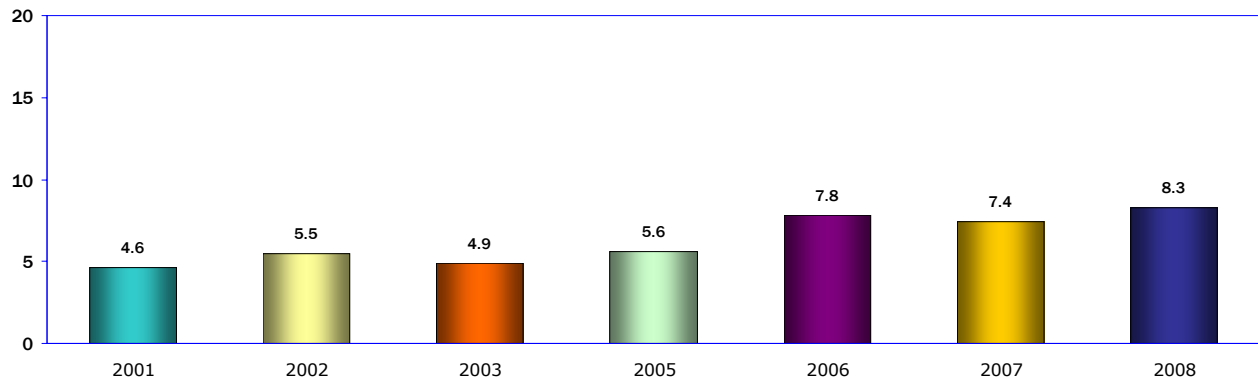


(Q400 M-2)

The Internet at Work: Active Use

Internet users in the current study are actively going online for an average of 8.3 hours per week at work - up almost one hour over 2007.

**Internet Use at Work, Average Hours per Week of Active Online Use for Work Purposes
(Internet Users Who Access the Internet at Work)**



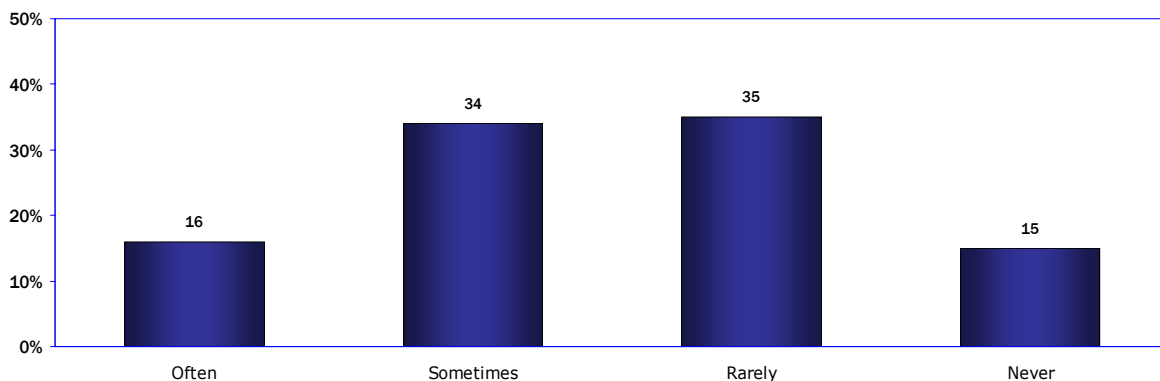
(Q400 M-1)

The Internet at Work: Non-Work Activities

In a new question for the Digital Future Project, half of Internet users who go online at work said they go online sometimes or often for non-work related reasons, among them general Web surfing, chatting, instant messaging, and reading and writing e-mails.

Only 15 percent of respondents who go online at work said they never go online for non-work purposes.

**Do You Go Online at Work for Non-Work Activities?
(Internet Users Age 16 and Older Who Use the Internet at Work)**



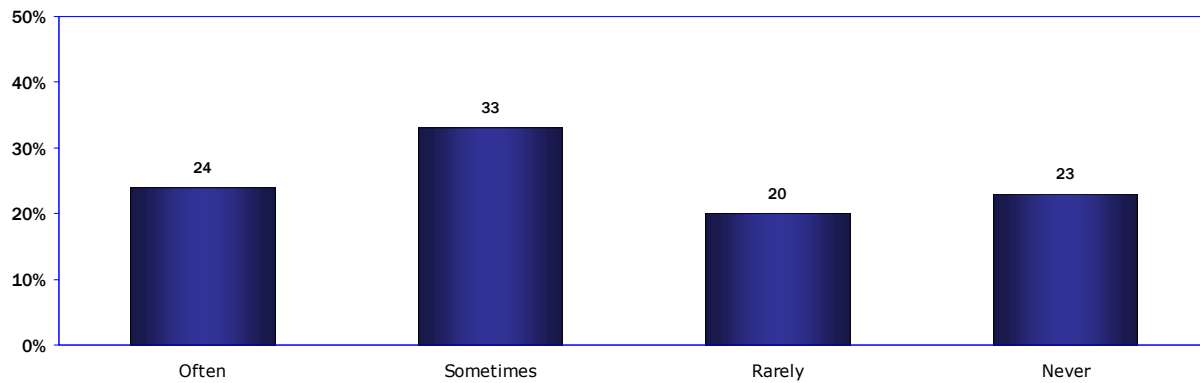
(Q493 M-1)

Using the Internet at Home for Work

A large percentage of Internet users who go online at work said they also go online at home for their jobs.

A new question for the Digital Future Project asked if Internet users are going online at home for their jobs. Fifty-seven percent of respondents who use the Internet at work said they sometimes or often go online at home for their jobs.

**How Often Do You Use the Internet at Home for Your Job?
(Internet Users Age 16 and Older Who Use Internet at Work)**



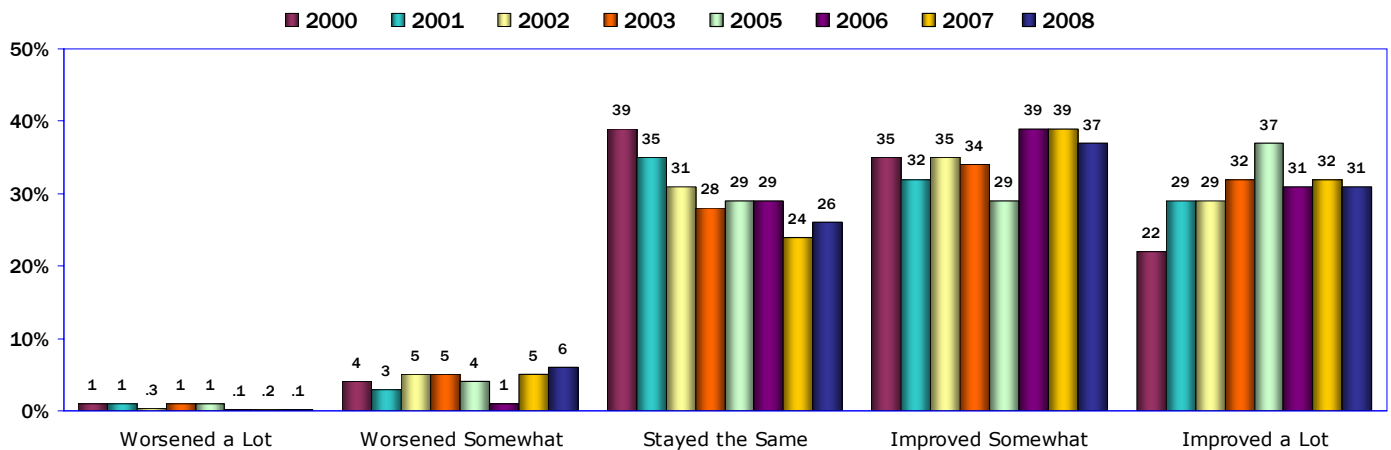
(Q494 M-1)

Productivity and the Internet at Work

The percentage of users who said the Internet at work makes them more productive remains high in the current Digital Future Project, with 68 percent of users who go online for their jobs saying that Internet access at work improves their productivity somewhat or a lot -- a marginal decrease from 71 percent who reported the same response in 2007.

While only a small percentage of users said that Internet access at work has “worsened somewhat” their productivity, that percentage has increased for the second year in a row.

Internet Access at Work: Views about Performance and Productivity
(Percentage of Internet Users Age 16 and Older Who Use the Internet at Work)



(Q491 M-2)

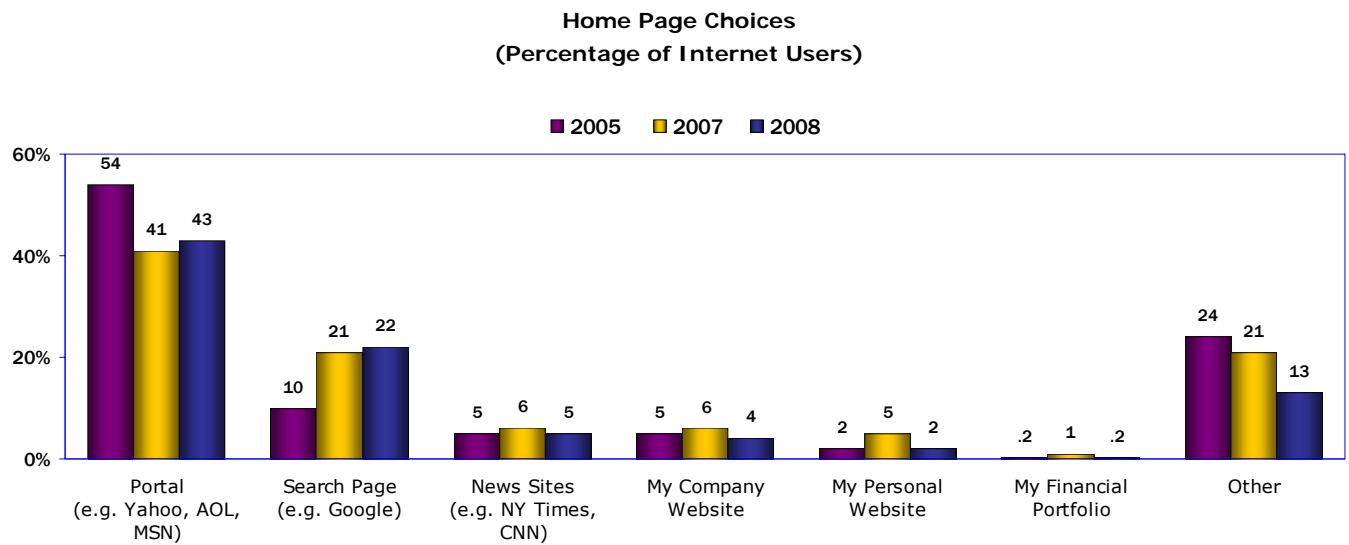
Home Page Choices

The percentage of Internet users who use a search engine for their home page continued to grow in the current Digital Future study.

Twenty-two percent of Internet users use a search page such as Google.

The percentage of users who start their online access with a portal such as Yahoo, MSN, or America Online also grew in the current study. Those who used a news site such as CNN or The New York Times dropped marginally, as did those who use a company or business Web site.

The percentage of users who choose their personal Web site as their home page also dropped.

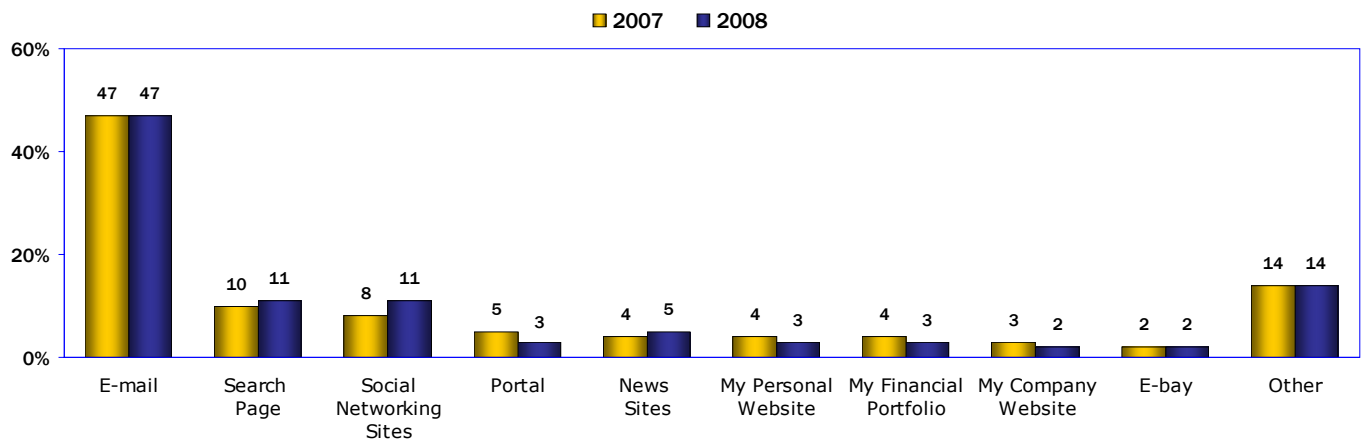


(Q294A M-2)

The Next Destination after the Home Page

In the current Digital Future study, as in 2007 (the first year this question was asked), by far the largest percentage of Internet users said that the online destination they chose after landing on their home page is their e-mail. Second most frequently, users go either to their search page or to a social networking site.

What is Your Next Destination after Your Home Page?
(Percentage of Internet Users)



(Q294B M-2)

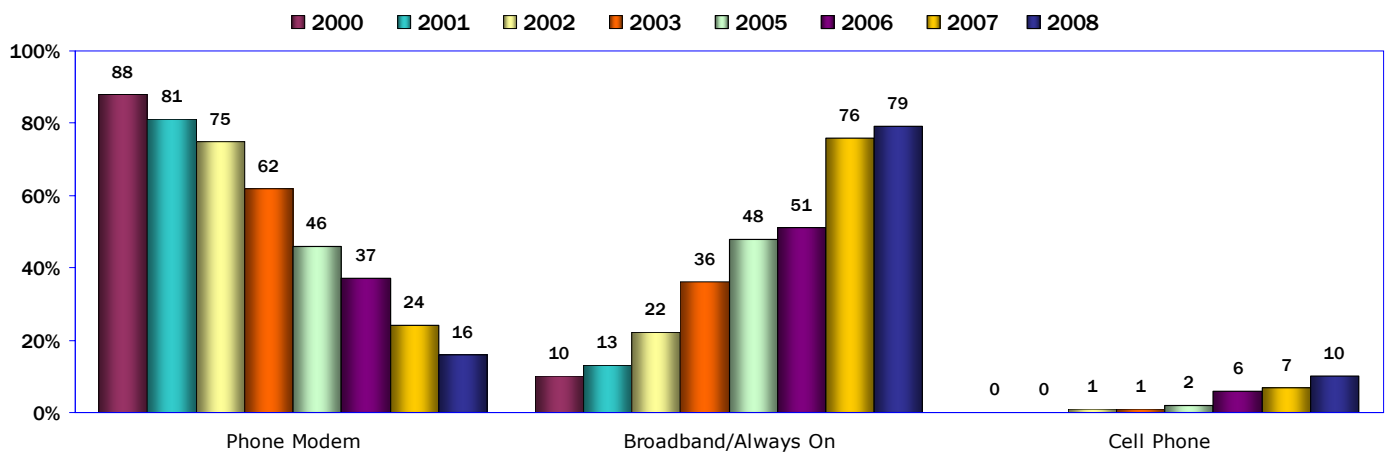
Internet Connection at Home: Modem, Broadband, Cell Phone

Internet access through a broadband connection is now by far the dominant form of online service at home. Broadband use is now approaching 80 percent of Internet users -- more than double the level of five years ago, and eight times the percentage from the first year of the Digital Future Project in 2000.

In the current Digital Future study, access to the Internet by phone modem has dropped to less than 20 percent of Internet users (16 percent). If current trends continue, within two years more people will access the Internet through their cell phones than through a telephone modem.

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

Internet Access by Type of Connection
(Percentage of Home Internet Users)



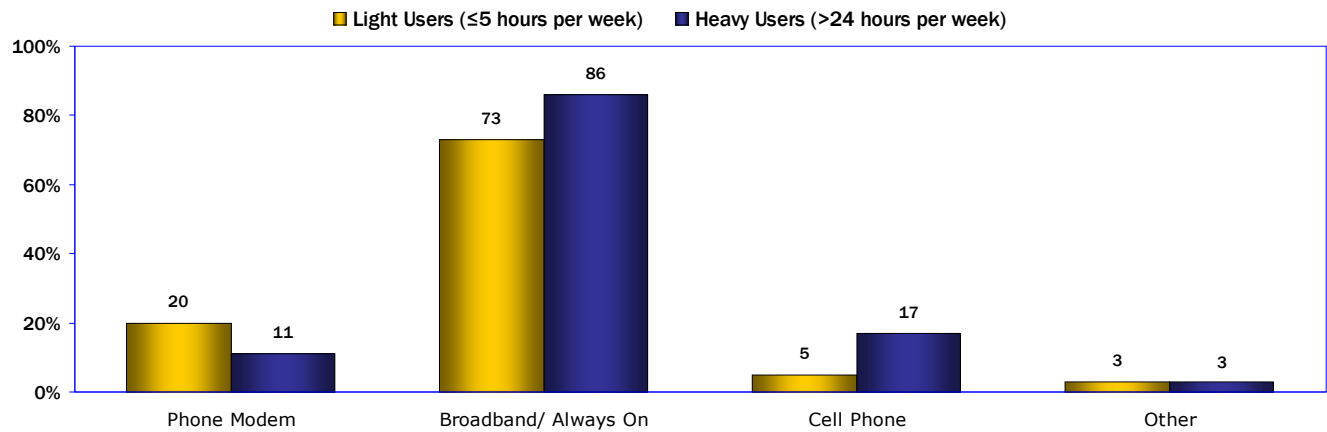
(Q360 M-3) (Multiple responses possible)

Internet Connection at Home: Light Users vs. Heavy Users

Large majorities of both light users and heavy users go online at home through a broadband connection.

Although a larger percentage of light users access the Internet through a telephone modem, of particular note is the 73 percent of light users who go online through a broadband connection. Even though these users only go online only a few hours each week, a large majority of them have nevertheless made the investment to bring a fast, always-on connection into their homes.

Internet Access by Type of Connection
(Percentage of Home Internet Users: Light Users vs. Heavy Users)



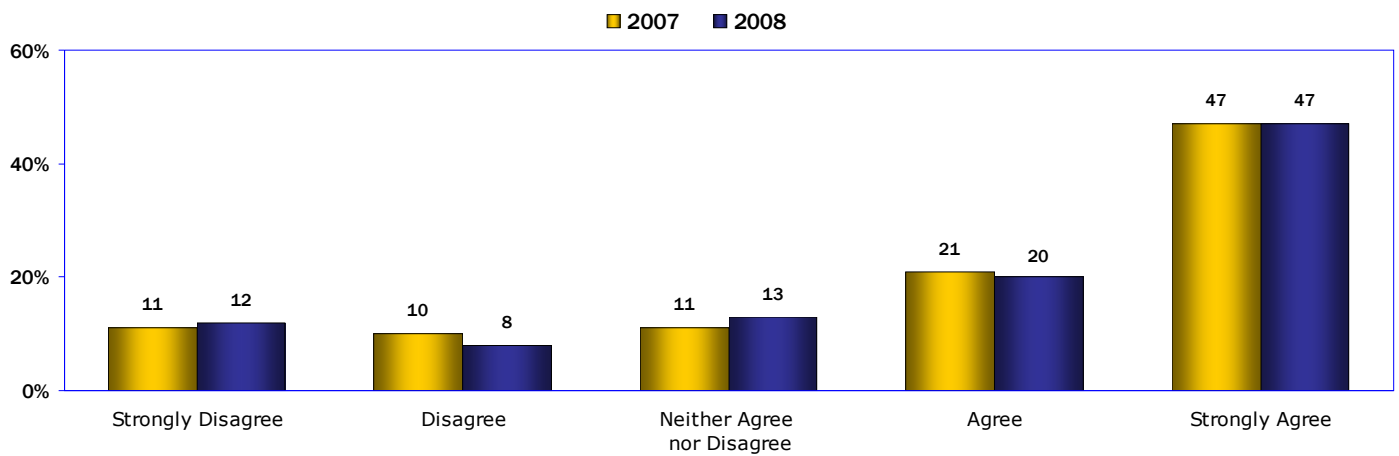
(Q360 M-2) (Multiple responses possible)

Broadband: is it Always On?

In the homes of a large majority of broadband users, the Internet is “always on.”

Two-thirds of home Internet users (67 percent) keep their broadband connection turned on most of the time while they are at home. Only 20 percent do not, down slightly from 2007 (the first year this question was asked).

**I Keep My Broadband Connection Turned on Most of the Time When I Am at Home
(Percentage of Broadband Users)**



(Q533 M-2)

Wi-Fi at Home

Do You Use a Wireless Connection at Home?

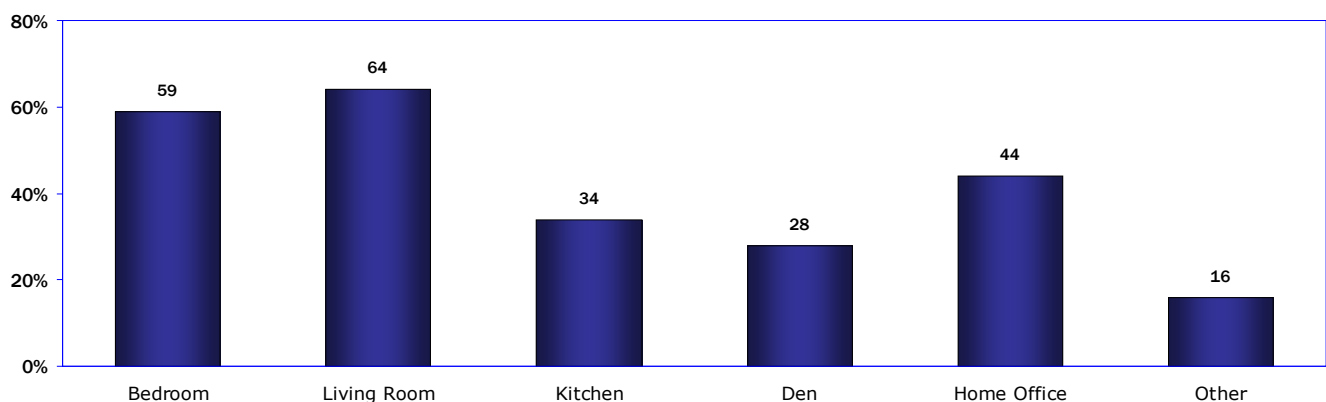
In a new question for this year's Digital Future study, respondents with a laptop computer at home were asked if they use a wireless connection.

Seventy-two percent of users with laptops at home said they use a wireless connection to that computer (Q135 M-1).

Using Wireless Connections at Home: Where is it Used?

In a related new question, users with laptops at home were asked where they use their wireless connection. With multiple responses possible, the largest percentage of users -- 64 percent -- reported that they use their wireless connection in the living room, while 59 percent said the bedroom. Using a wireless laptop in a room designated as a home office was third, with 44 percent, while the kitchen ranked fourth (34 percent).

From What Room(s) Do You Generally Use WiFi at Home?
(Respondents Who Use the Internet at Home)



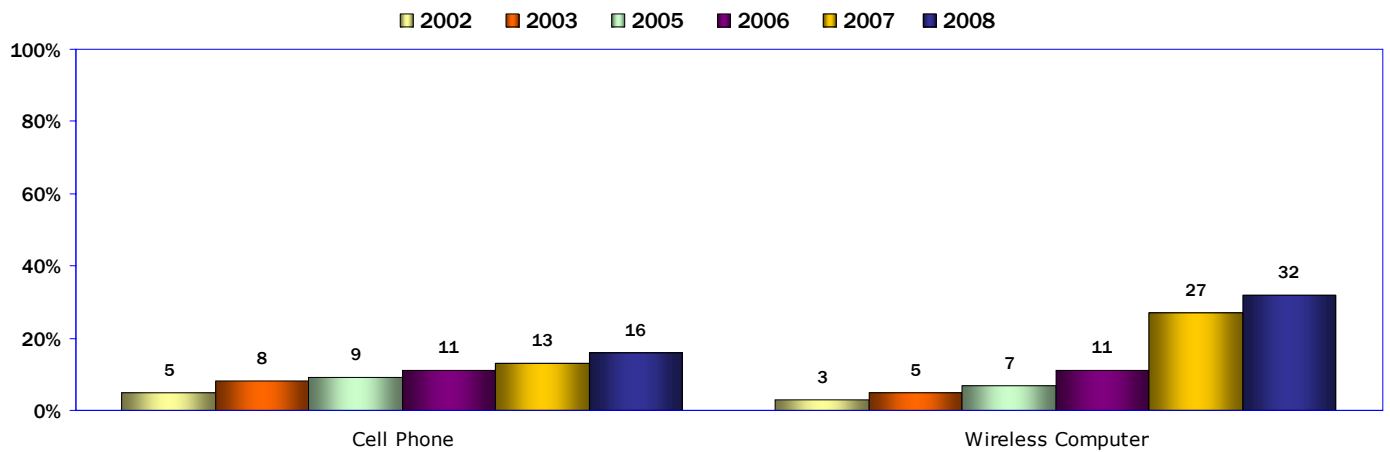
(Q136 M-1) (Multiple responses possible)

Internet Access by Cell Phone and Wireless Computer

Using cell phones and wireless computers to go online continues to increase, reaching the highest levels thus far in the Digital Future Project. More than 30 percent of Internet users (32 percent) said they go online with a wireless computer -- almost triple the percentage reported in 2006.

Internet access by cell phone also continues to grow (to 16 percent of Internet users), having increased in every year of the Digital Future studies.

**Wireless Access to the Internet
(Percentage of Internet Users)**



(Q440 M-3)

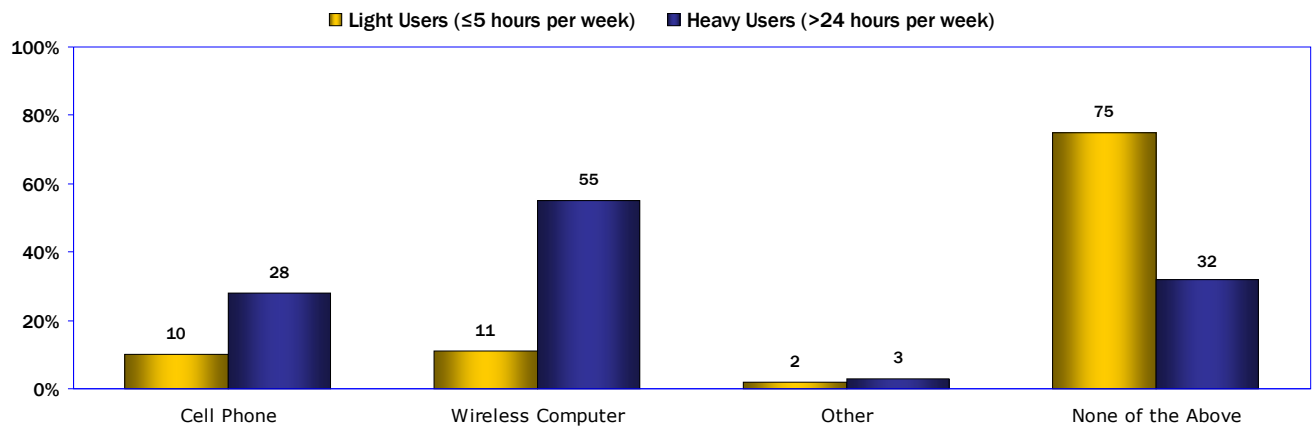
Internet Access by Cell Phone And Wireless Computer: Light Users vs. Heavy Users

Light users and heavy users alike access the Internet through wireless means, although a much larger percentage of heavy users reported doing so.

Almost three times as many heavy users compared to light users go online with a cell phone, while five times as many heavy users as light users go online with a wireless computer.

Three-quarters of light users (75 percent) do not use wireless access to the Internet.

**Wireless Access to the Internet
(Percentage of Internet Users)**

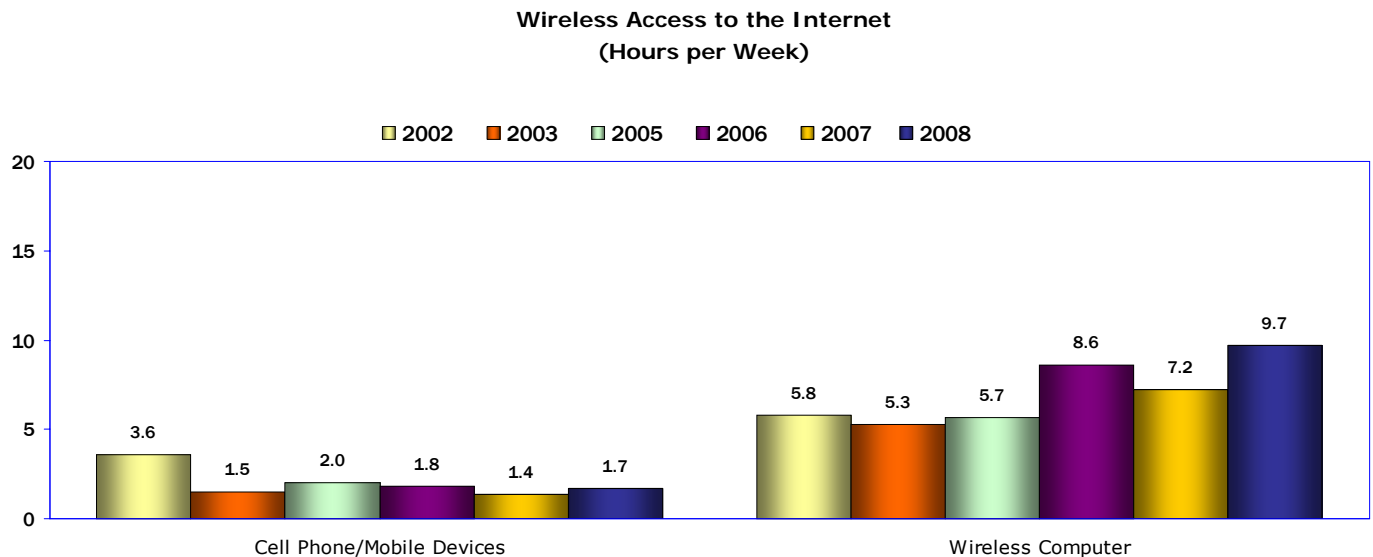


(Q440 M-2)

Internet Access by Mobile Devices and Wireless Computer: Hours per Week

While the percentage of users who go online through wireless connections continues to increase (see page 52), the number of hours per week that users access the Internet through wireless methods has changed less dramatically over the years of the Digital Future studies.

Among users who access the Internet with their cell phones, the number of hours online each week on a cell phone has remained generally stable after dropping from the first year the question was asked. Among users with wireless computers, the number of hours of online access remained about the same for the first three years of the studies, but then increased sharply in 2006. It has now reached its highest level yet in the current study.

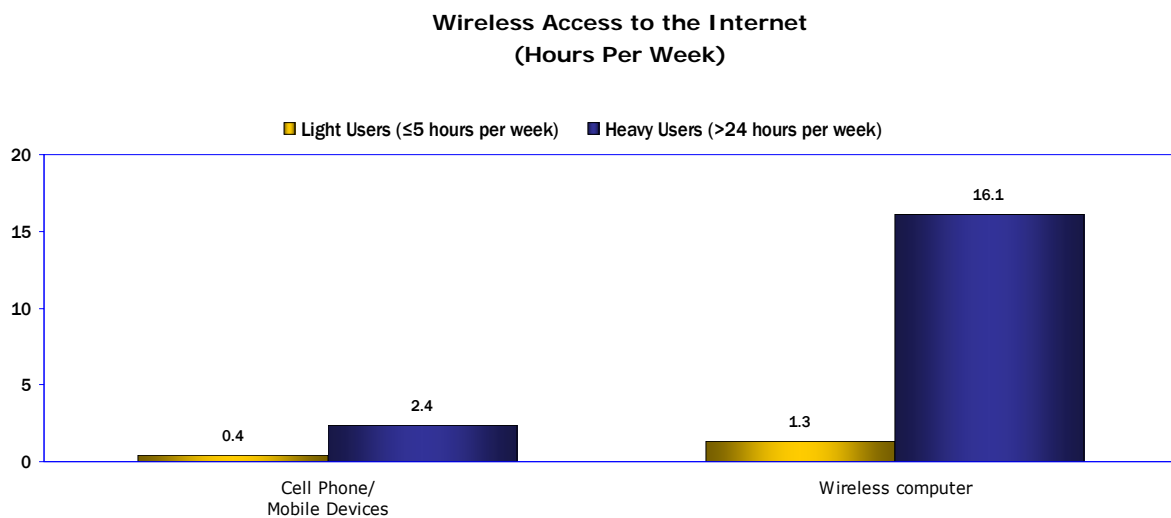


(Q441 M-1)

Internet Access by Mobile Devices and Wireless Computer: Hours per Week (Light Users vs. Heavy Users)

Heavy users go online for more than ten times as many hours per week by wireless computer than do light users.

Heavy users also reported more than six times as many hours through cell phone access than do light users.



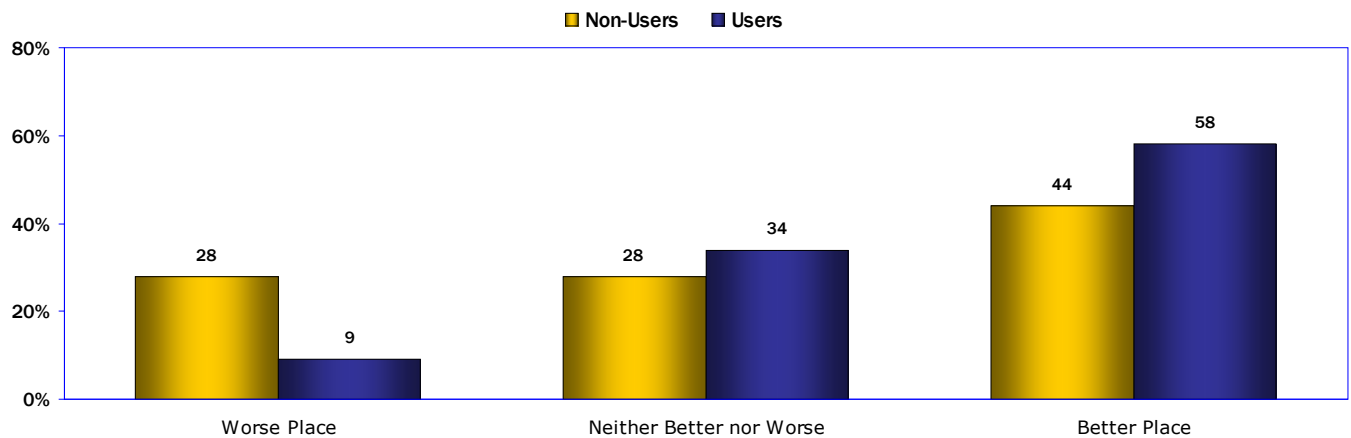
(Q441 M2 and M3)

Communication Technology: How Does it Affect the World?

Internet users and non-users continue to express strongly contrasting views about the impact of new communication technology on the world.

While 58 percent of Internet users in the current study said that communication technology makes the world a better place, only 44 percent of non-users express the same view. And, 28 percent of non-users said communication technology (the Internet, cell phones, pagers, and other electronics) makes the world a worse place -- more than three times as high as the percentage of users who reported the same response -- and up sharply from the previous year (see the next page).

Has Communication Technology Made the World a Better Place, or a Worse Place?
(Percentage of Respondents Age 16 and Older)



(Q180 M-1)

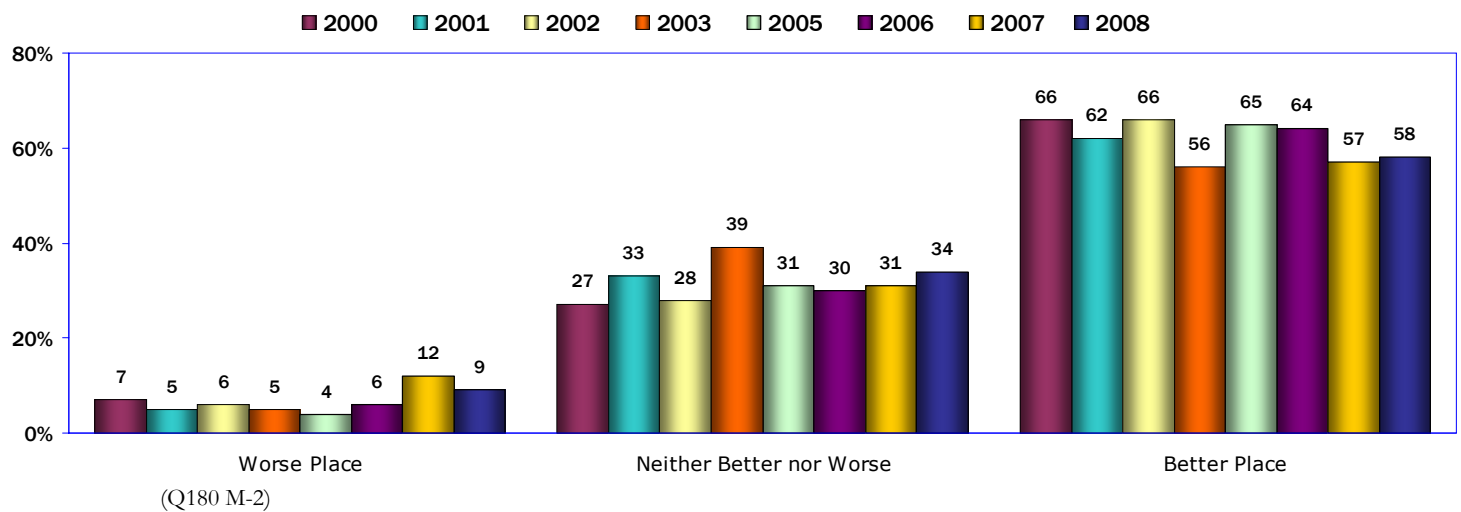
Communication Technology: How Does it Affect the World?

Views of Internet Users

While the percentage of users who said that communication technology makes the world a better place remains relatively high (58 percent), that number is well below the peak percentages in earlier years of the study, when almost two-thirds of users (66 percent) said communication technology makes the world a better place.

At the same time, the percentage of users who said that communication technology makes the world a worse place declined in the current Digital Future study, while those who believe that this technology makes the world neither better or worse increased slightly.

Has Communication Technology Made the World a Better Place, or a Worse Place?
(Percentage of Internet Users Age 16 and Older)

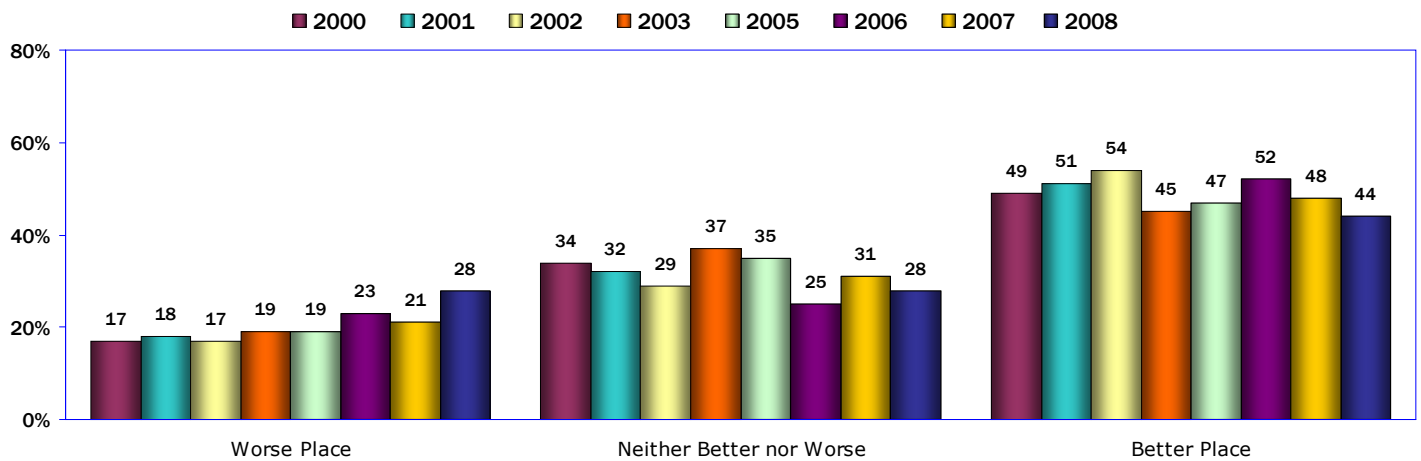


Communication Technology: How Does it Affect the World?

Views of Internet Non-Users

For the third year in a row, the percentage of non-users who said that communication technology makes the world a better place declined. At the same time, the percentage who said communication technology makes the world a worse place increased, and to its highest level in the history of the Digital Future studies.

Has Communication Technology Made The World A Better Place, Or A Worse Place?
(Percentage of Internet Non-Users Age 16 and Older)



(Q180 M-3)

Internet Non-Users

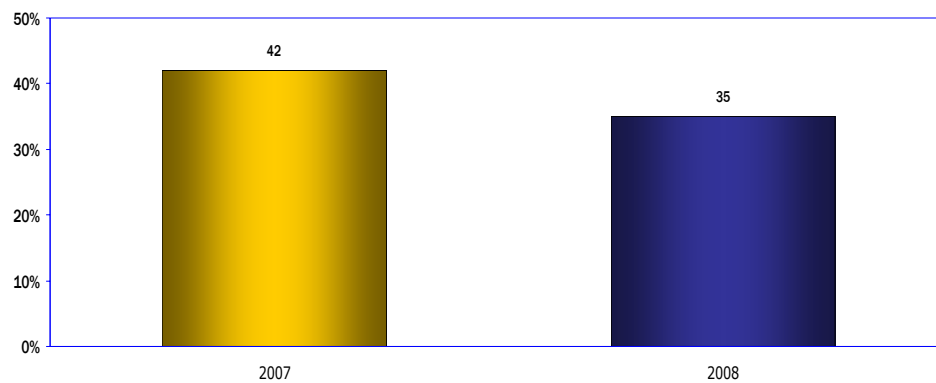
<i>Internet non-users</i>	20%
<i>Internet “dropouts” (non-users who previously went online)</i>	35%
<i>How many years on average did dropouts use the Internet before they stopped?</i>	3.3 years
<i>Will non-users go online in the next year?</i>	Yes: 36%
<i>Will Internet dropouts go back online?</i>	Yes: 48%

Internet Non-Users: Exploring the Views of 20 percent of Americans

Internet Non-users: Were They Ever Online?

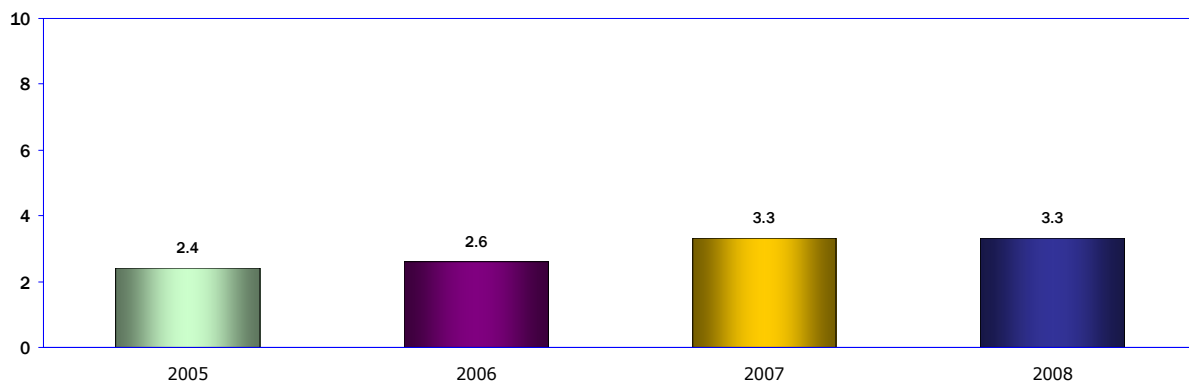
Of the 20 percent of Americans who are not currently using the Internet, more than one-third (35 percent) had previously gone online, and had used the Internet for an average of 3.3 years before stopping (see bottom chart).

**Did You Ever Use the Internet?
(Percentage of Internet Non-Users)**



(Q540 JC-1)

**How Long Did You Use the Internet Before Stopping?
(Years of Use by Internet Dropouts)**



(Q570 JC-1)

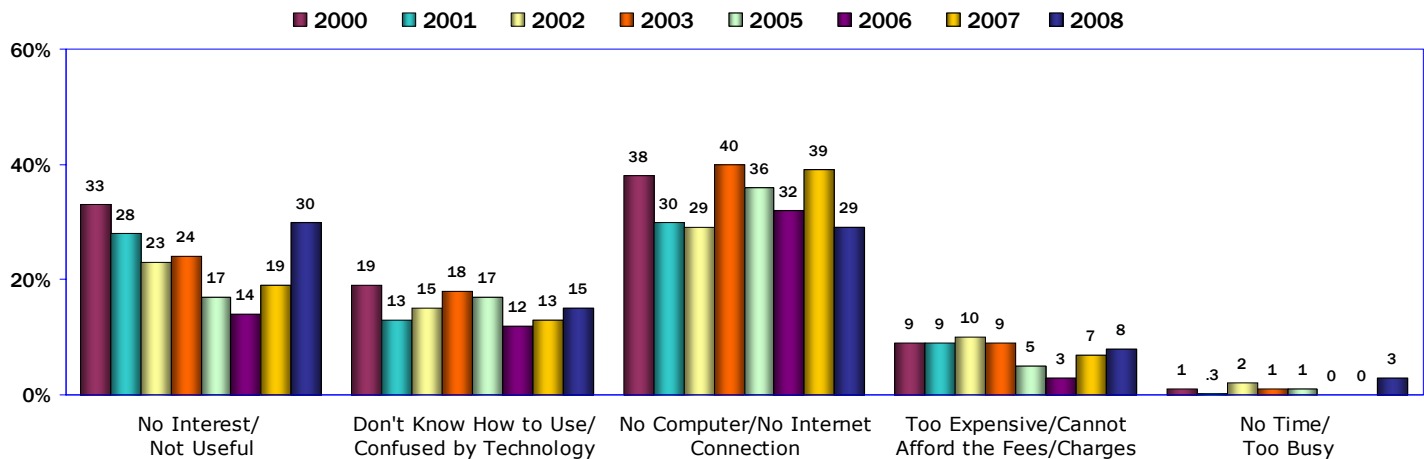
Internet Non-Users: Reasons For Not Being Online?

Fifteen years after Americans began general Internet use, those who do not go online continue to offer four major reasons for not using the Internet -- but those reasons are changing in frequency.

The most common reason for not using the Internet was “no interest” or “not useful” -- cited by 30 percent of all non-users -- the first time that explanation has been the most-cited reason. In second place, and close behind “lack of interest,” is “no computer” or “no Internet connection.”

The other two principal reasons -- “don’t know how to use the Internet” or “too expensive” -- both increased slightly for the second year in a row.

Reasons For Not Going Online
(Percentage of Internet Non-Users)



(Q591 JC-2) (“No Internet connection” was added to the “no computer” category in 2006)

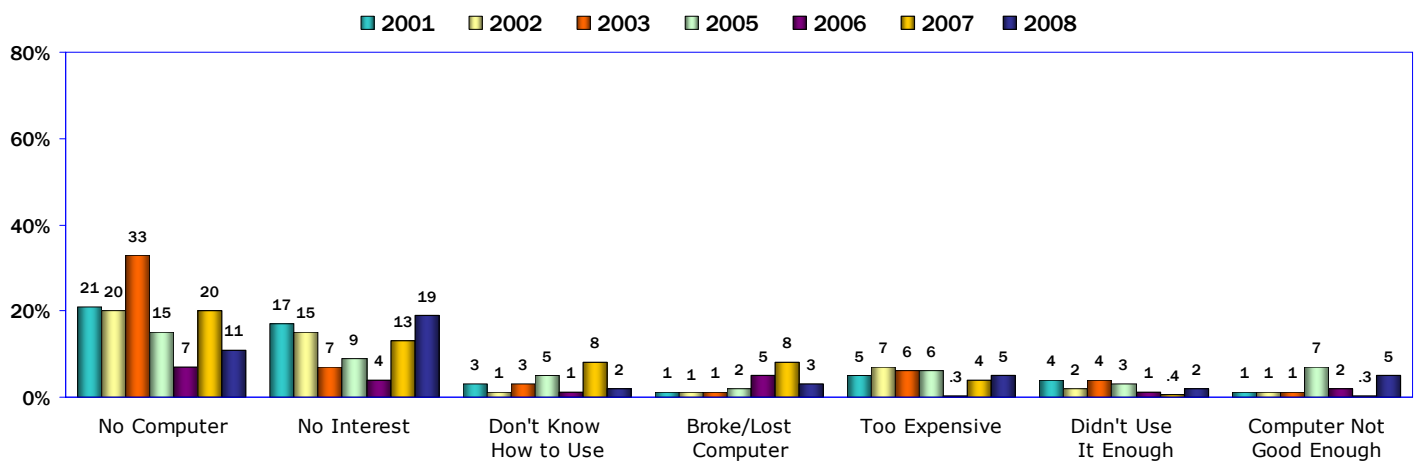
“Internet Dropouts”: Exploring Why Users Stop Going Online

“Internet dropouts” -- those who previously used the Internet but no longer go online -- continue to report a variety of reasons for remaining non-users. But as with non-users overall, the responses of Internet dropouts shifted significantly in the current Digital Future study.

As with non-users overall, the largest percentage of Internet dropouts reported that the reason they stopped going online is “no interest” -- an increase to 19 percent from 13 percent in 2007. “No computer” was the second most-cited reason.

Having a computer that is “not good enough” for Internet use increased from near-zero in 2007 to five percent in the current study.

Internet Dropouts: Reasons Why Former Internet Users No Longer Go Online
(Percentage of Former Internet Users)

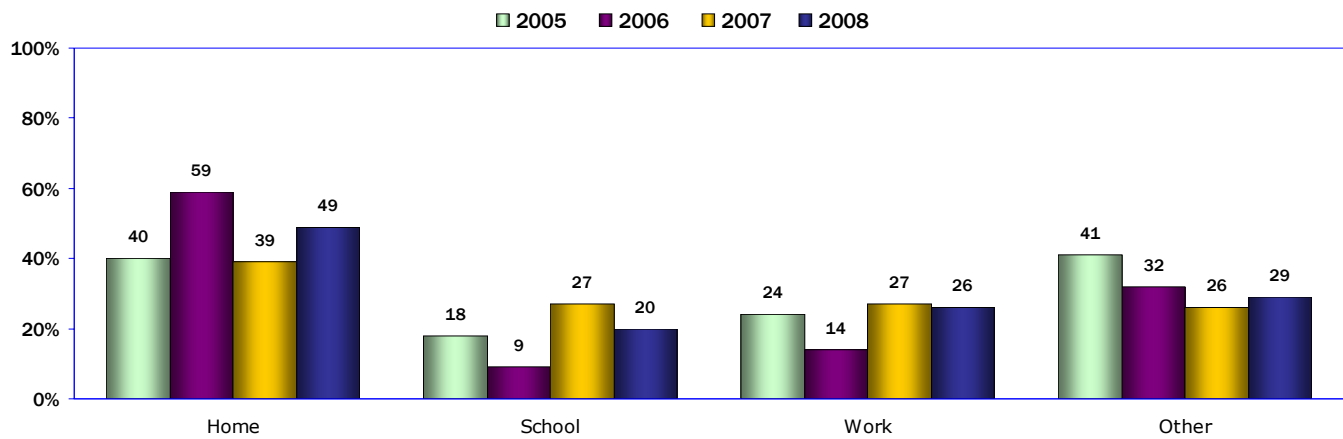


(Q580 JC-2)

Where Did Dropouts Previously Access the Internet?

A near-majority of Internet dropouts in the current study (49 percent) were previously home users, while smaller percentages used the Internet at work (26 percent), or other locations.

**Where Did You Go Online?
(Percentage of Former Internet Users)**



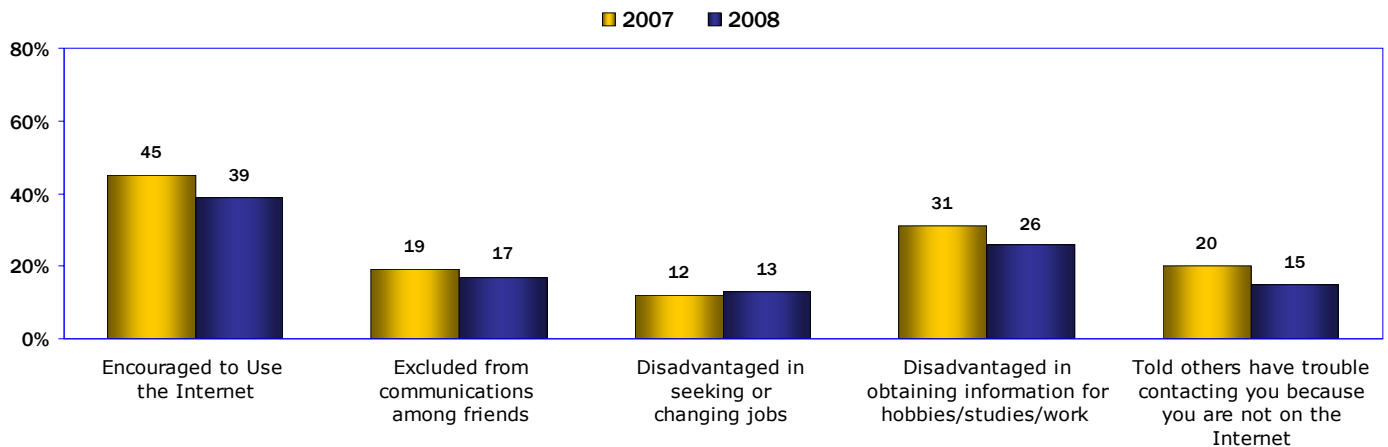
(Q550 M-2)

Internet Non-Users: Views About Not Being Online

Thirty-nine percent of non-users reported that others encourage them to use the Internet -- a response down from 45 percent in 2007. Other declining percentages were reported by those who said they were excluded from communications among friends, or were told that others have trouble contacting them.

A marginally higher percentage of non-users said that not being online put them at a disadvantage in seeking or changing jobs.

Have You Had The Following Experiences Because You Are Not An Internet User?
(Percentage of Internet Non-Users)



(Q600 JC-1) (Multiple responses possible)

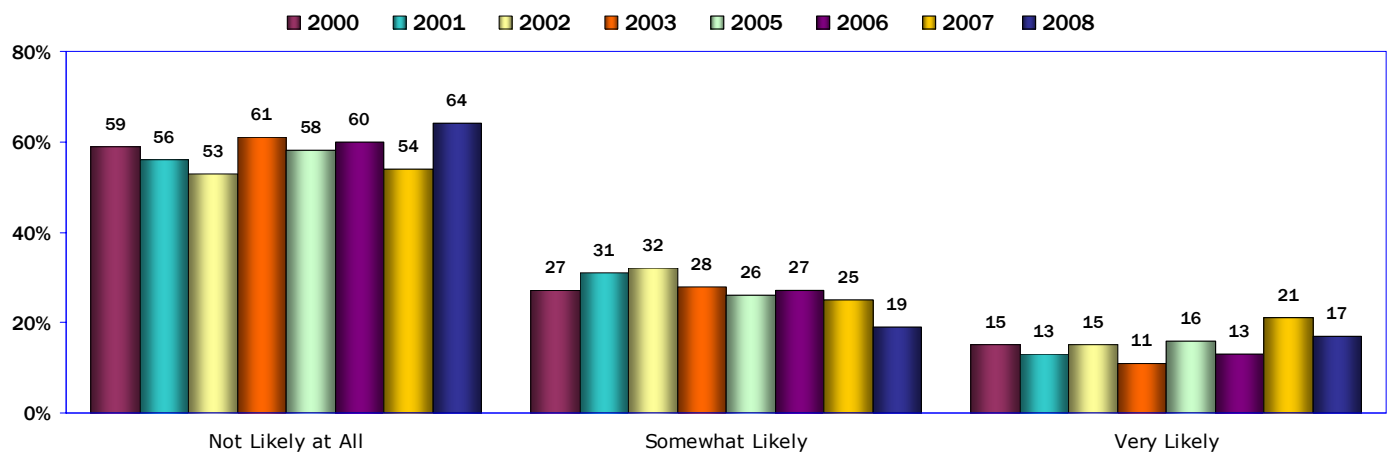
Internet Non-Users: Will They Go Online?

Is it likely that Internet non-users will go online?

Only 36 percent of Internet non-users in the current study said they are somewhat likely or very likely to go online within the next year -- down from 46 percent in 2007 and the lowest percentage in the eight years of the Digital Future studies.

The percentage of respondents who said they are not likely at all to use the Internet in the next year increased to 64 percent of non-users -- up from 2007 and now the highest level in the Digital Future Project.

How Likely Will You Be To Use The Internet Within The Next Year?
(Percentage of Internet Non-Users)

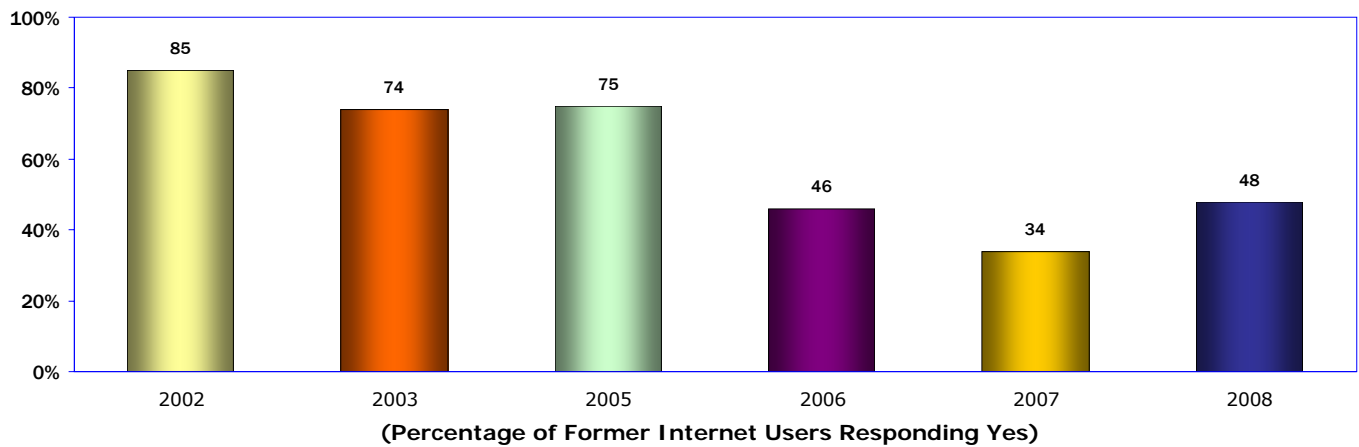


(Q610 JC-2)

Internet Dropouts: Will They Go Back Online?

The percentage of Internet dropouts in the current Digital Future study who said they will go back online increased substantially over 2007, and is now nearly half (48 percent) of former users, reversing a downward trend that began in 2006.

Do You Think You Will Ever Go Back Online?



(Q620 JC-2)

Media Use And Trust

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

2006	66%
2008	79%

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

Government sites	79%
Established media sites	73%
Individuals' sites	15%

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

54%

***Internet users who would not miss
their printed newspaper if the
offline version was no longer available***

24%

***Internet users who stopped
a subscription to a newspaper
or magazine because they get
the same information online***

22%

Views about Sources of Information and Entertainment

After 15 years of Internet access, the 80 percent of Americans who go online consider the Internet to be their most important source of information -- this over television, radio, and newspapers.

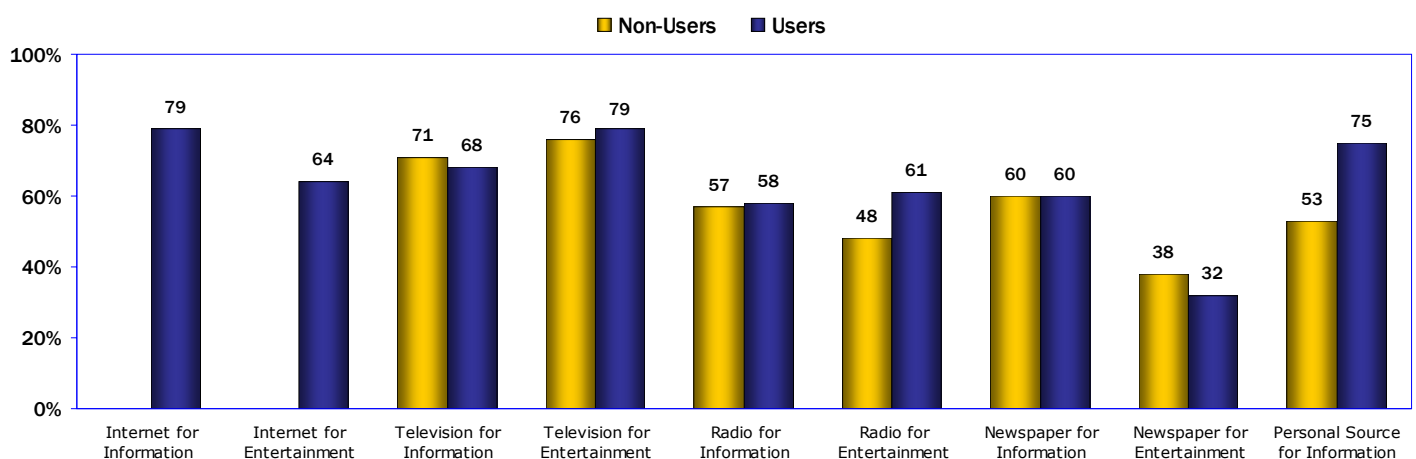
The Digital Future Project found that 79 percent of users said the Internet was either an important or very important source of information for them -- higher than the figure reported for television (68 percent), newspapers (60 percent), or radio (58 percent).

Among non-users, television still earns the largest percentage of those who consider it an important or very important source of information for them (71 percent), compared to newspapers (60 percent) and radio (57 percent).

Comparing views of users about the importance of entertainment sources, television ranks highest, with 79 percent of users saying it is an important or very important entertainment source for them, compared to the Internet (64 percent), radio (61 percent), and newspapers (32 percent).

Among non-users, television also ranks highest by importance as an entertainment source (76 percent), followed by radio (48 percent) and newspapers (38 percent).

Views about Media as Sources of Information and Entertainment
(Percentage of Respondents Age 17 and Older Answering "Important" or "Very Important" for Them)



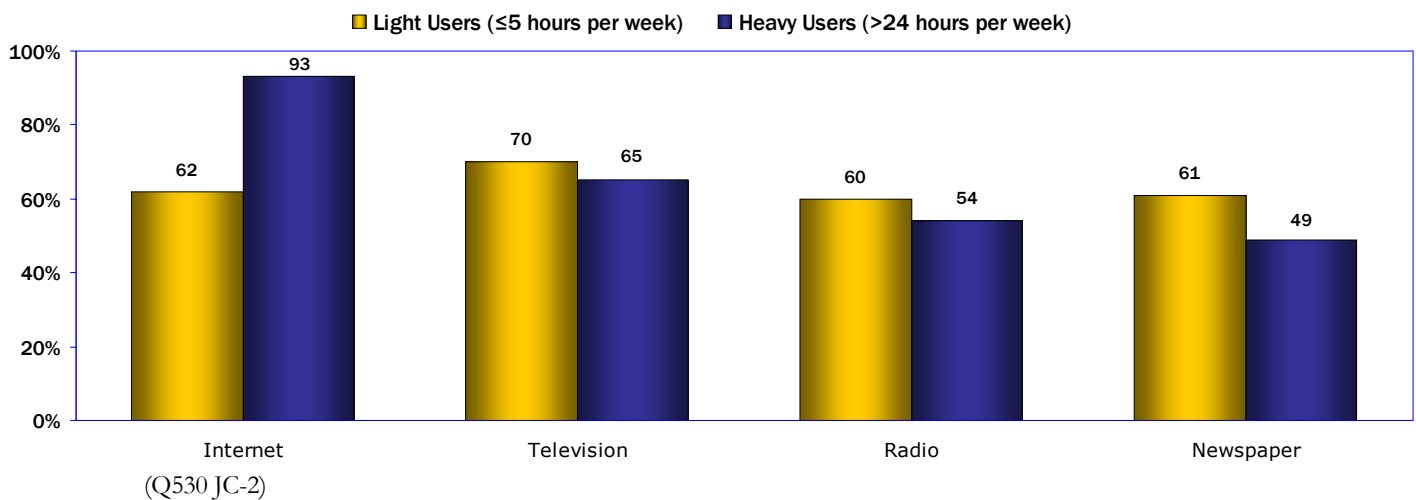
(Q530 JC-1)

Views about Sources of Information: Light Users vs. Heavy Users

Nearly all of the heavy online users (93 percent) consider the Internet to be an important or very important source of information for them -- a level much higher than those reported for television (65 percent), radio (54 percent), or newspapers (49 percent).

A much smaller percentage of light users compared to heavy users consider the Internet to be an important or very important source of information for them -- 62 percent.

Views about Media as Sources of Information
(Percentage of Light Users vs. Heavy Users Age 16 or Older Answering "Important" or "Very Important" for them)



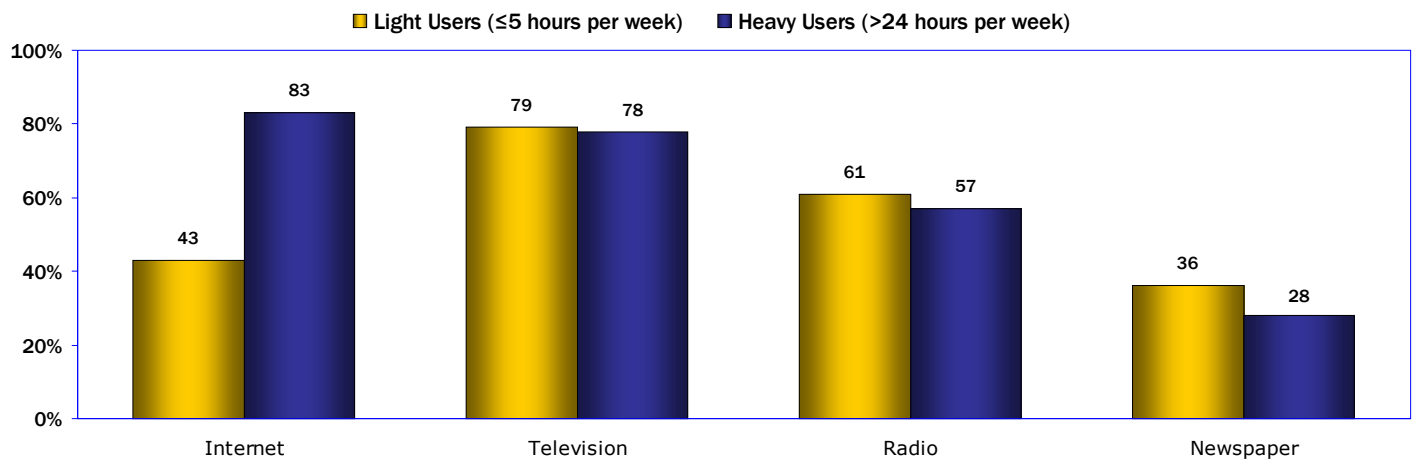
Views about Sources of Entertainment: Light Users vs. Heavy Users

More heavy users (83 percent) ranked the Internet as an important or very important source of entertainment for them compared to other media, while the largest percentage of light users ranked television as important or very important for entertainment.

Among heavy users, a slightly smaller percentage -- 78 percent -- ranked television as important or very important for entertainment for them.

Only 43 percent of light users consider the Internet to be an important or very important source of entertainment.

Views about Media as Sources of Entertainment
(Percentage of Light Users vs. Heavy Users Age 16 or Older Answering "Important" or "Very Important" for them)



(Q530 JC-3)

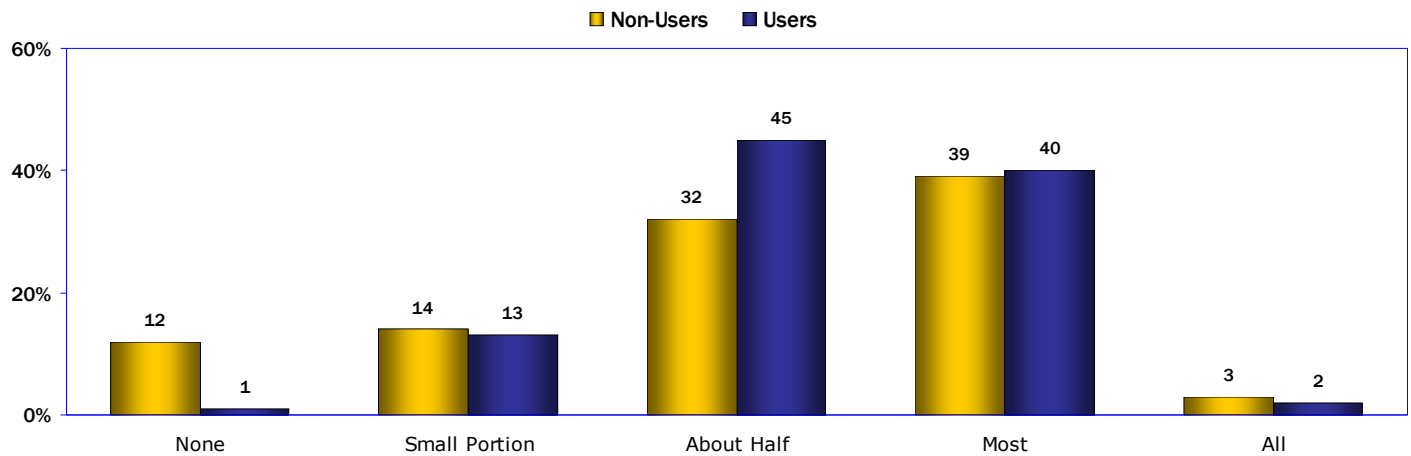
Information Online: Is It Reliable?

Almost equal percentages of Internet users and non-users in the current Digital Future study said that most or all of the information on the Internet is reliable.

In the study, 42 percent of Internet users and 42 percent of non-users said that most or all of the information online is generally reliable.

The main disparities in the views of users and non-users in the current study are their negative views about Internet reliability. Among non-users, 12 percent said that none of the information online is reliable, while only one percent of users express the same view.

**How Much of the Information on the World Wide Web Overall
Do You Think is Reliable?
(Percentage of Internet Non-Users vs. Users)**



(Q160 M-1)

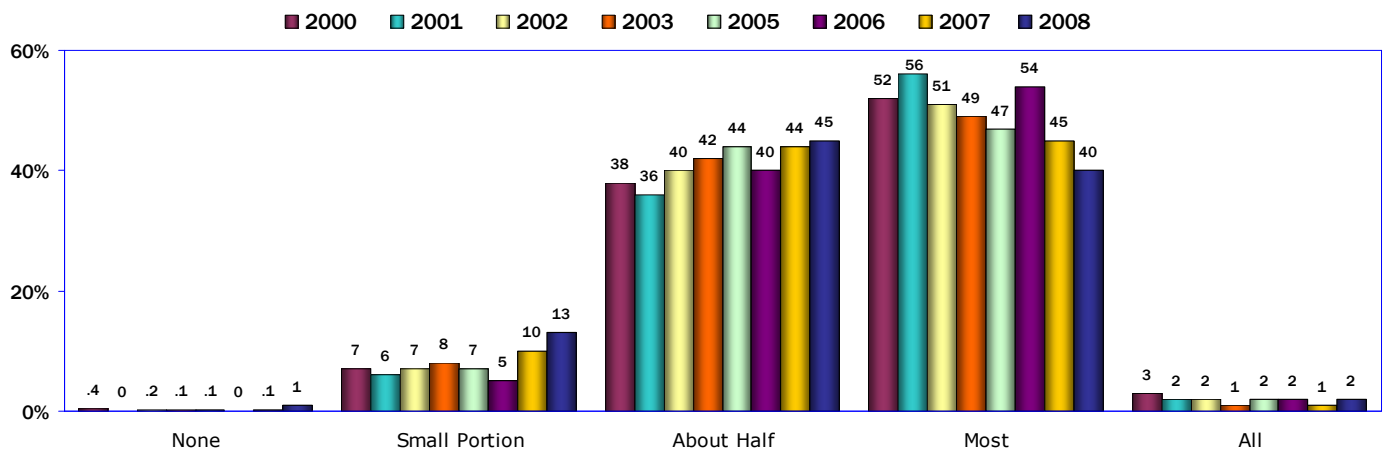
Reliability of Information Online: Views of Internet Users

Comparing the views of Internet users over the eight years of the Digital Future studies shows a second year of decline in the percentage of those who think that most or all of the information online is reliable.

In 2006, 56 percent of users said that most or all of the information online is reliable; that percentage declined to 46 percent in 2007 and 42 percent in the current study -- the lowest level thus far in the Digital Future Project.

At the same time, the percentage of users who said that only a small portion or none of the information online is reliable has grown for the past two years, and has now reached 14 percent of users.

**How Much of the Information on the World Wide Web Overall
Do You Think is Reliable?**
(Percentage of Internet Users)

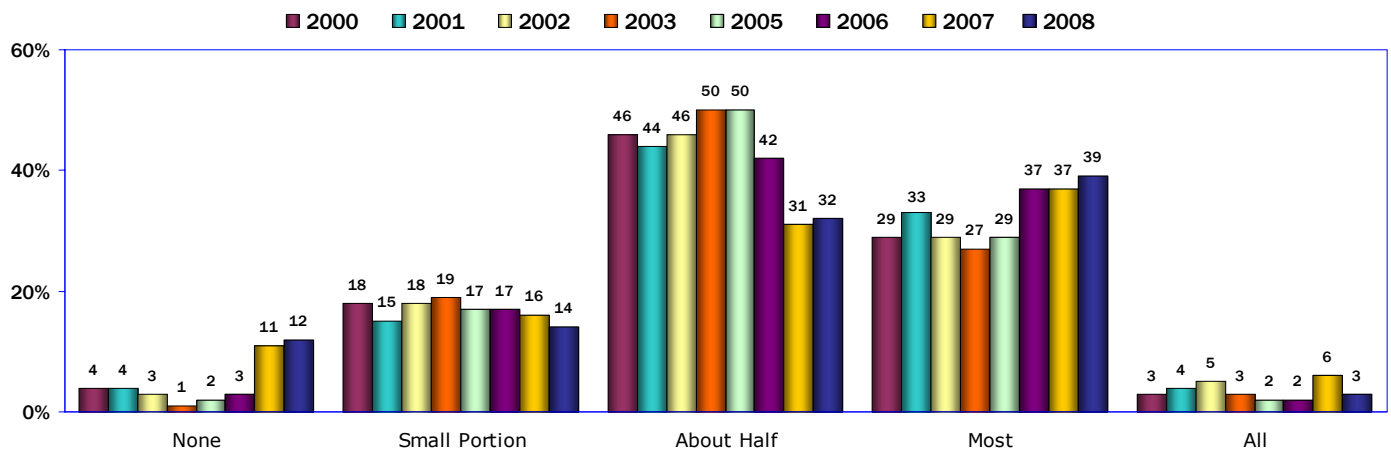


(Q160 M-3)

Reliability of Information Online: Views of Non-Users

Although the same percentage of non-users as users said that most or all of the information online is reliable (42 percent), a much larger percentage of non-users said that none or only a small portion of information on the Internet is reliable -- in the current study 26 percent, down marginally from 27 percent in 2007.

**How Much of the Information on the World Wide Web Overall
Do You Think is Reliable?**
(Percentage of Internet Non-Users)



(Q160 M-2)

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

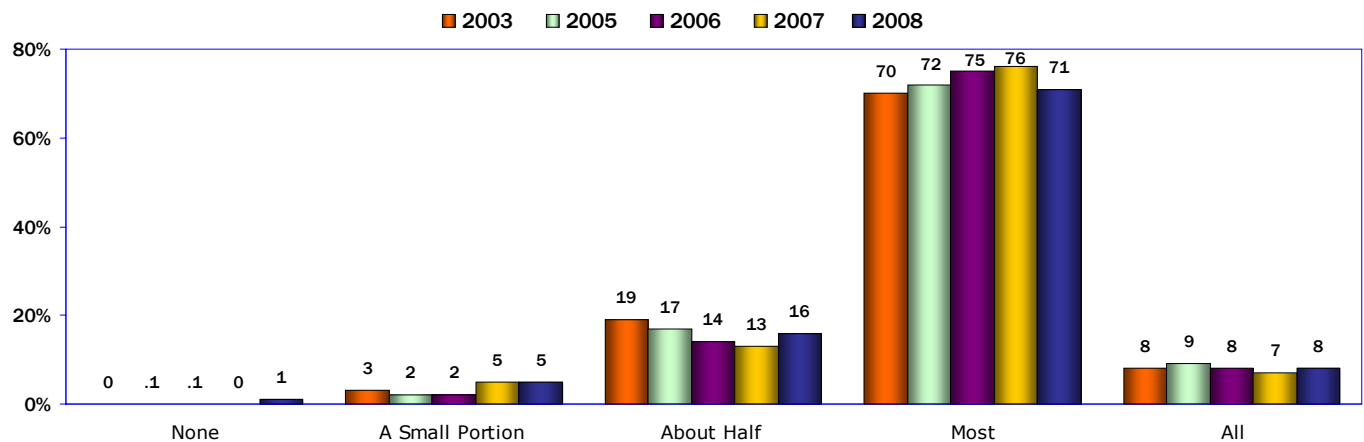
Internet users have more faith in the Web sites they visit regularly than they do in information online overall.

In the current study, 79 percent said that most or all of the information on the Web sites they visit regularly is reliable -- this compared to 83 percent in both 2007 and 2006.

Sixteen percent of users in the current study said that about half of the information on the sites they visit regularly is reliable, up from 13 percent in 2007.

The percentage of users who said that only a small portion or none of the information on the sites they visit regularly is reliable has remained fairly stable for the last two years of the study (six percent in the current study compared to five percent in 2007).

**How Much of the Information on the World Wide Web Sites
that You Visit Regularly Do You Think is Reliable?
(Percentage of Internet Users)**



(Q170 M-3) (Excludes Internet users who do not visit Web sites regularly.)

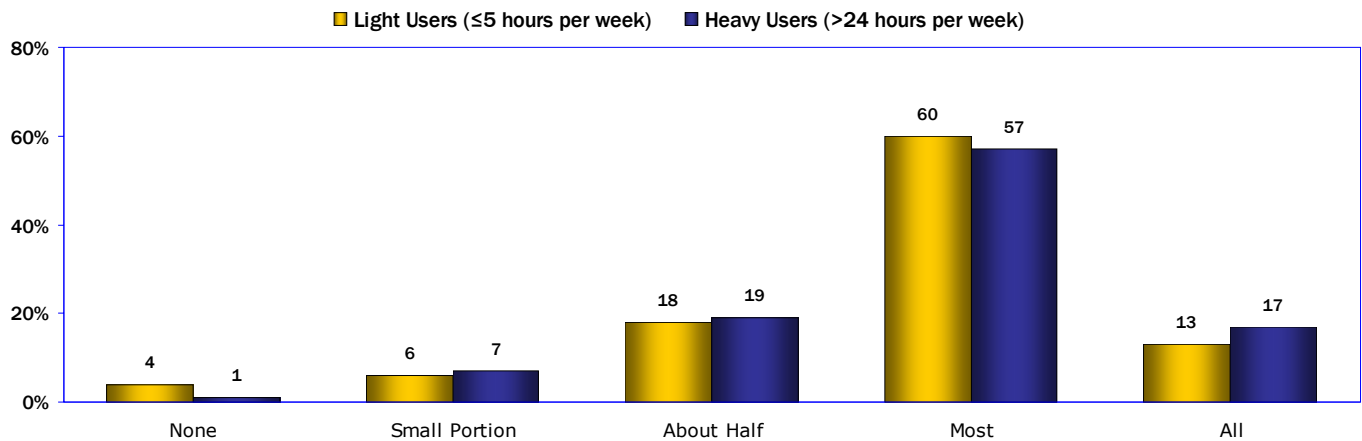
Views About The Reliability Of Online Information: Light Users Vs. Heavy Users

Comparing the views of light users and heavy users about the reliability of Web sites they visit regularly shows that heavy users have somewhat more positive views than light users about the sites they visit.

Of the heavy users, 83 percent said that most or all of the information on the Web sites they visit regularly is reliable -- this compared to 72 percent of light users who express the same view.

Very small percentages of both light users and heavy users said that only a small portion or none of the information on the sites they visit regularly is reliable: 7 percent of light users, and 4 percent of heavy users.

**How Much of the Information on the World Wide Web Sites
that You Visit Regularly Do You Think is Reliable?
(Percentage of Light Users vs. Heavy Users)**



(Q170 M-2) (Excludes Internet users who do not visit Web sites regularly.)

Web Sites: Which Are Reliable And Which Are Not?

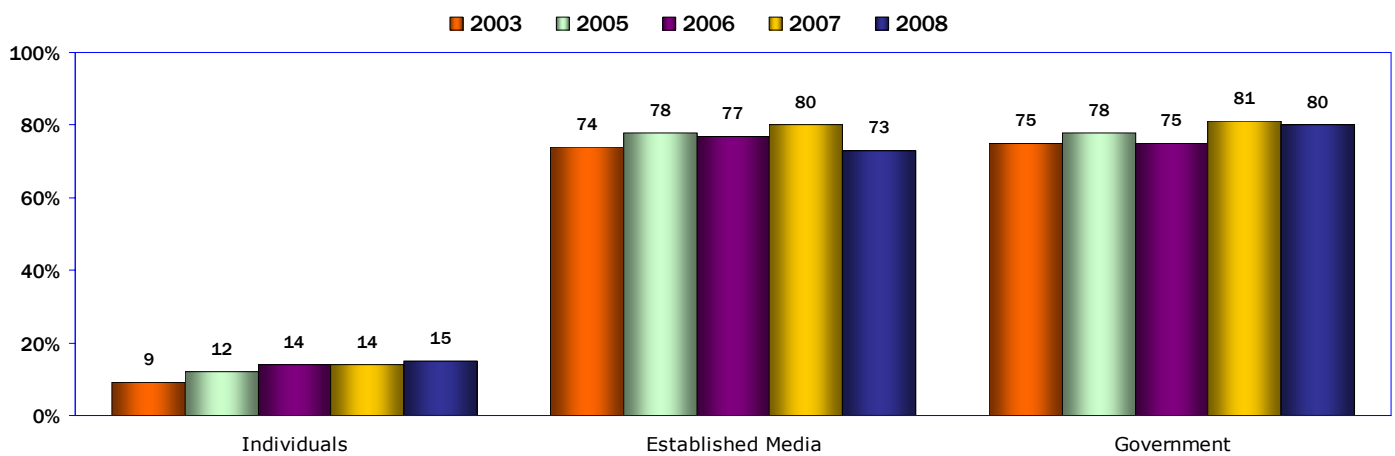
The percentage of Internet users who said that most or all of the information posted by individuals and governments is reliable and accurate remained generally consistent with the previous studies in the Digital Future Project. However, the percentage who reported a high level of reliability for established media declined in the current study.

In the current Digital Future Project, 80 percent of Internet users said that government Web sites were generally reliable and accurate -- about the same in 2007.

Faith in news pages posted by established media (such as nytimes.com and cnn.com) decreased, with 73 percent of users saying that the information on these sites is reliable and accurate -- down from 80 percent in 2007, and now at the lowest level yet reported in the Digital Future studies.

As in previous years, information pages posted by individuals received a very low positive response, with only 15 percent of users saying that most or all of information posted by individuals is reliable and accurate.

**How Much of the Information on Specific Types of Internet Sites
Do You Think are Generally Reliable and Accurate?
(Percentage of Internet Users Reporting "Most" or "All")**

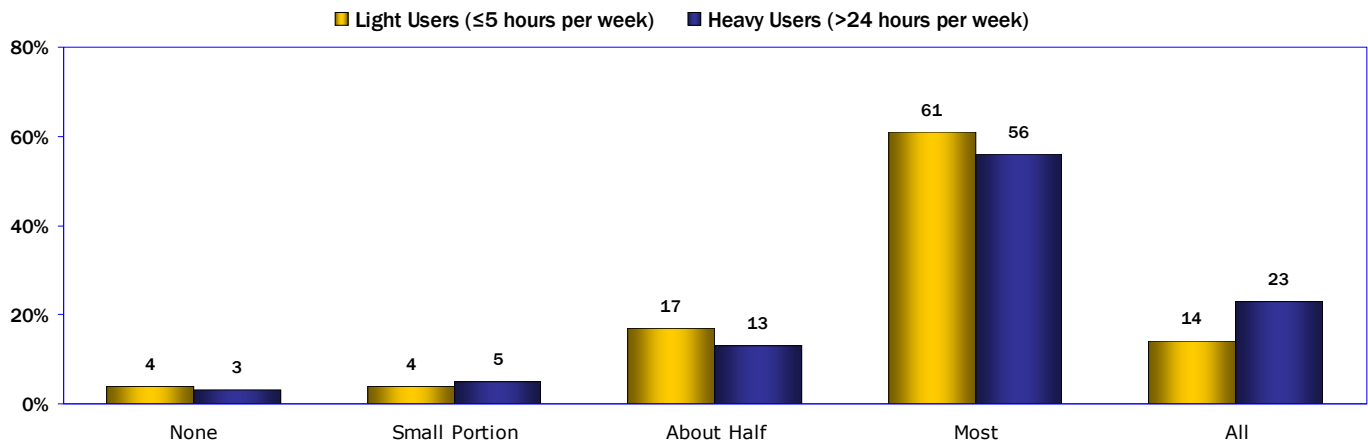


(Q173 M-3-6-9 combined)

Government Web Sites: Light Users vs. Heavy Users

Among light Internet users, 75 percent said that most or all of the information posted on government Web sites is reliable and accurate. An even higher percentage of heavy users -- 79 percent -- reported that same response. Also, note that nine percent more heavy users than light users said that all of the information posted on government Web sites is reliable and accurate.

Reliability of Government Web Sites
(Percentage of Light Users vs. Heavy Users)



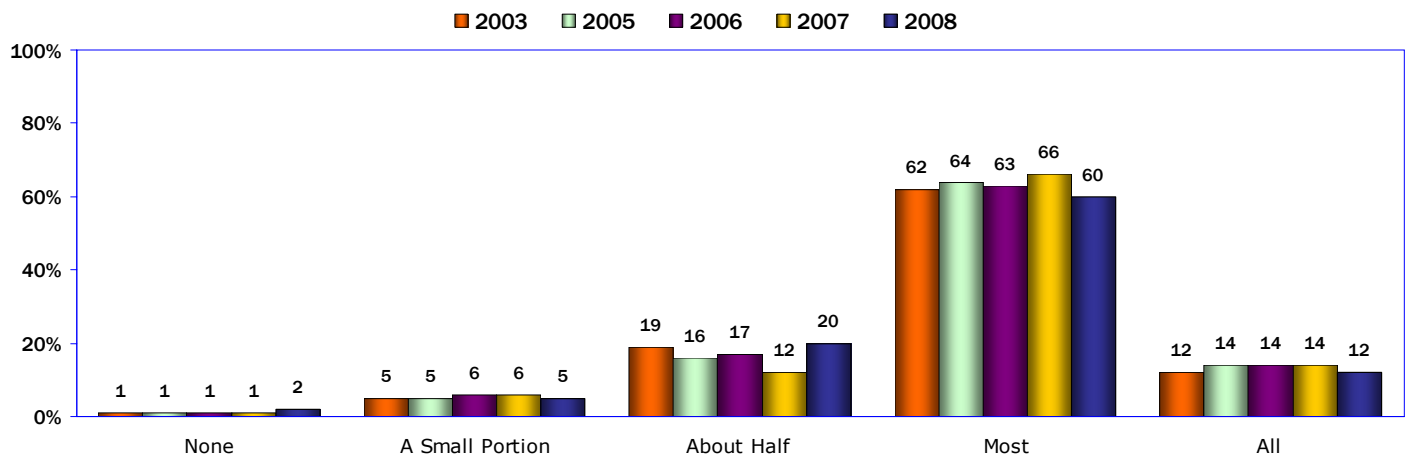
(Q173 M-8)

Media Web Pages: Reliability And Accuracy

Even though the percentage of Internet users who reported high levels of reliability and accuracy for established media Web pages declined in the current study, the percentage remains relatively high.

Among users, 72 percent said that most or all of the information posted on media Web sites such as nytimes.com and cnn.com is generally reliable and accurate -- down from 80 percent in 2007.

Reliability of News Pages Posted by Established Media
(Percentage of Internet Users)



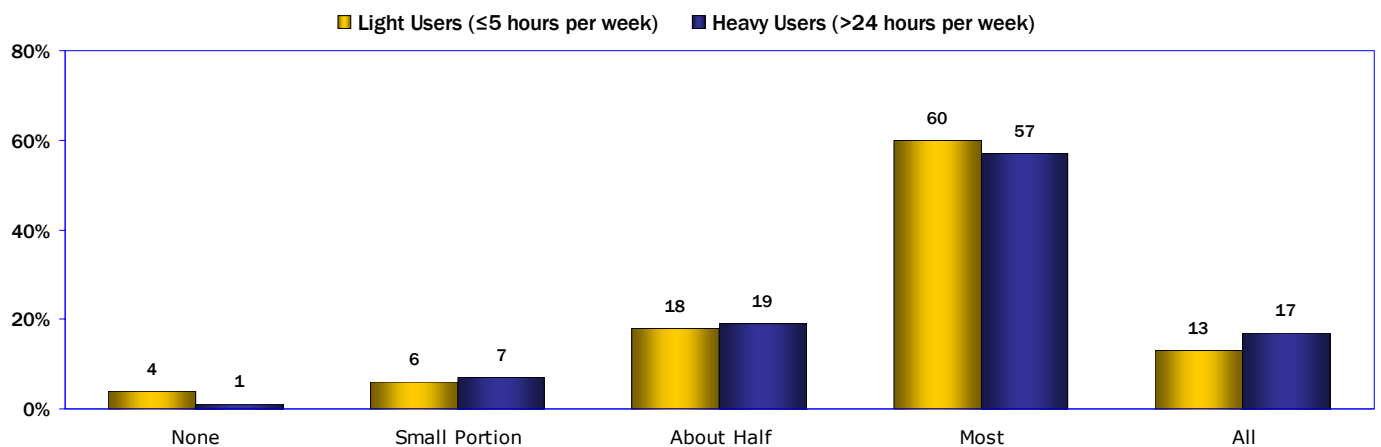
(Q173 M-3)

Media Web Pages: Light Users vs. Heavy Users

Light users and heavy users reported similar views about the reliability and accuracy of news pages posted by established media.

Almost identical percentages of light users and heavy users reported that most or all of the information on news pages posted by established media is reliable and accurate: 73 percent of light users, and 74 percent of heavy users.

Reliability of Established Media Web Sites
(Percentage of Light Users Vs. Heavy Users)



(Q173 M-2)

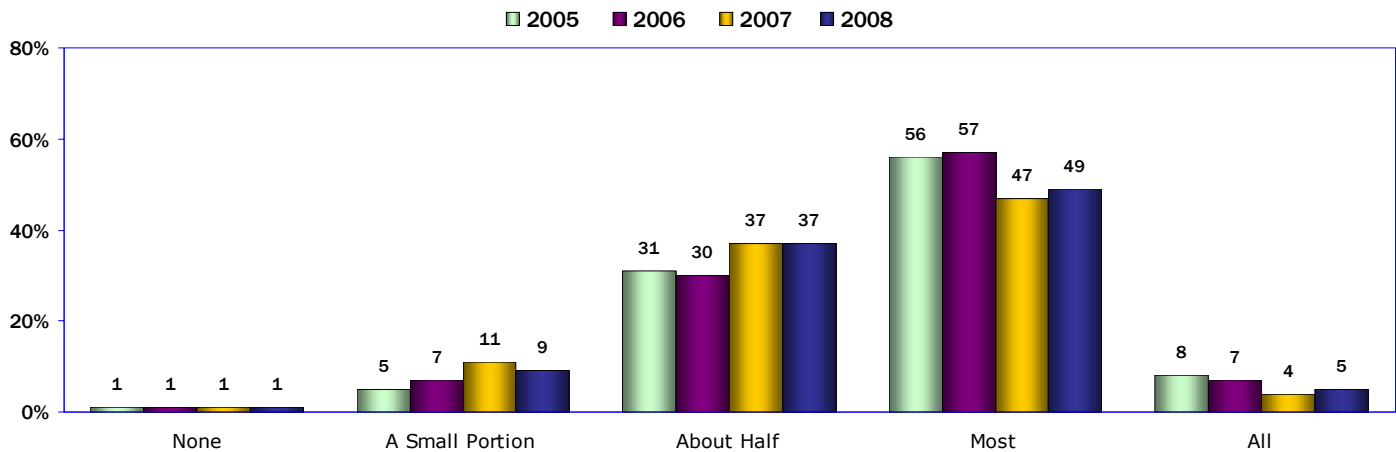
Search Engines: Reliability

The percentage of Internet users who said that most or all of the information provided by search engines such as Google is reliable and accurate rose slightly in the current study after a decline in 2007.

In the current study, 54 percent of users said that most or all of the information provided by their search engines is reliable and accurate, compared to 51 percent in 2007 and 64 percent in 2006.

Only 10 percent of users said that none or only a small portion of the information provided by search engines is reliable and accurate, compared to 12 percent in 2007 and eight percent in 2006.

Reliability And Accuracy Of Information Provided By Search Engines
(Percentage of Internet Users)



(Q173 M-12)

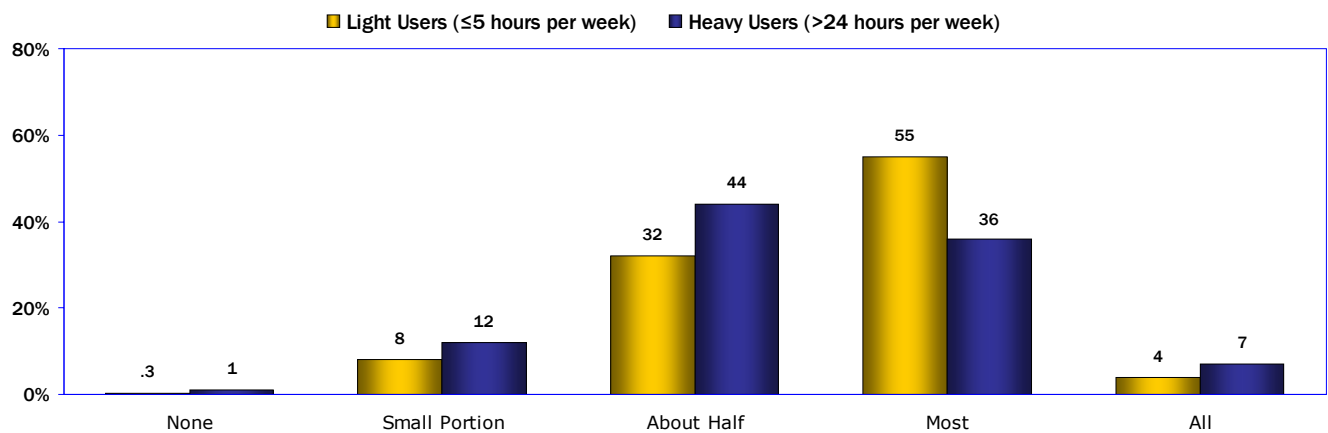
Search Engines: Views Among Light Users Vs. Heavy Users About Reliability And Accuracy

Heavy Internet users have less faith than light users in the reliability and accuracy of information provided by search engines.

In the current study, only 43 percent of heavy users said that most or all of the information provided by search engines is generally reliable and accurate -- this compared to 59 percent of light users.

A larger percentage of heavy users (13 percent) compared to light users (8 percent) said that only a small portion or none of the information provided by search engines is generally reliable and accurate.

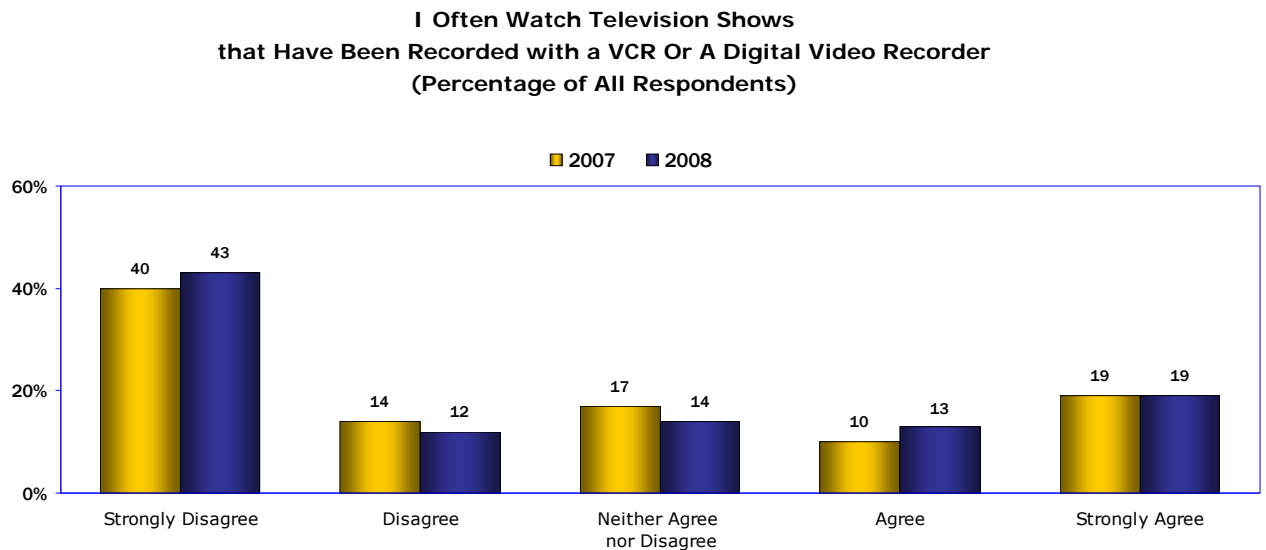
**How Much of the Information Provided by Search Engines is Generally Reliable and Accurate?
(Percentage of Light Users Vs. Heavy Users)**



(Q173 M-11)

TV Viewing and Time-Shifting

Thirty-one percent of respondents said they record television shows with a VCR or digital video recorder such as Tivo or those offered by cable or satellite TV providers -- compared to 29 percent in 2007.

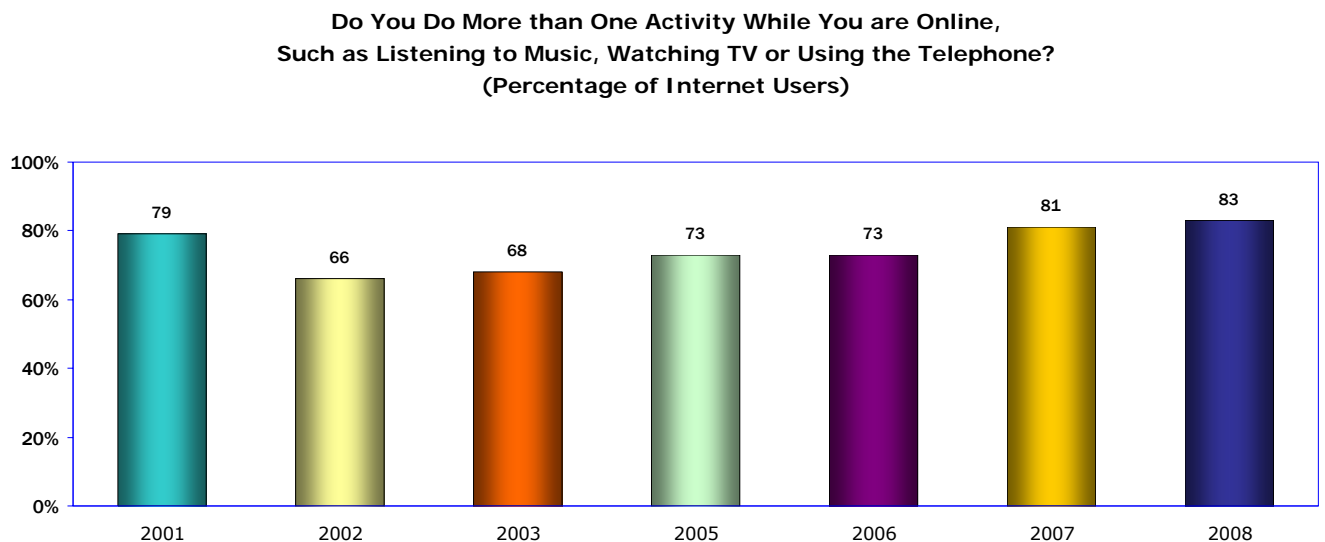


(Q533 M-6)

Using Offline Media

Most Internet users are multitaskers.

The percentage of users who said they participate in offline activities while they are online -- listening to music, watching TV, or talking on the telephone, among others -- has increased to 83 percent, the highest level thus far in the Digital Future studies.

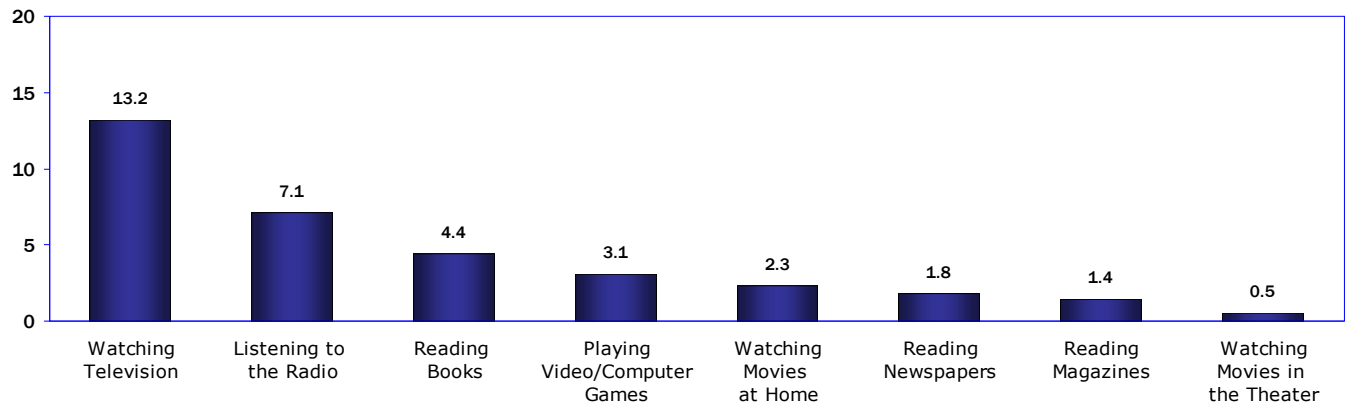


(Q720 M-2)

Using Offline Media: Activities

Internet users reported spending considerable amounts of time involved with other media while not online, with television consuming more time (13.2 hours) than the next two largest categories combined (listening to the radio and reading books).

**Leisure Time Spent Weekly on Media Activities While Not Online
(Internet Users, Number of Hours)**

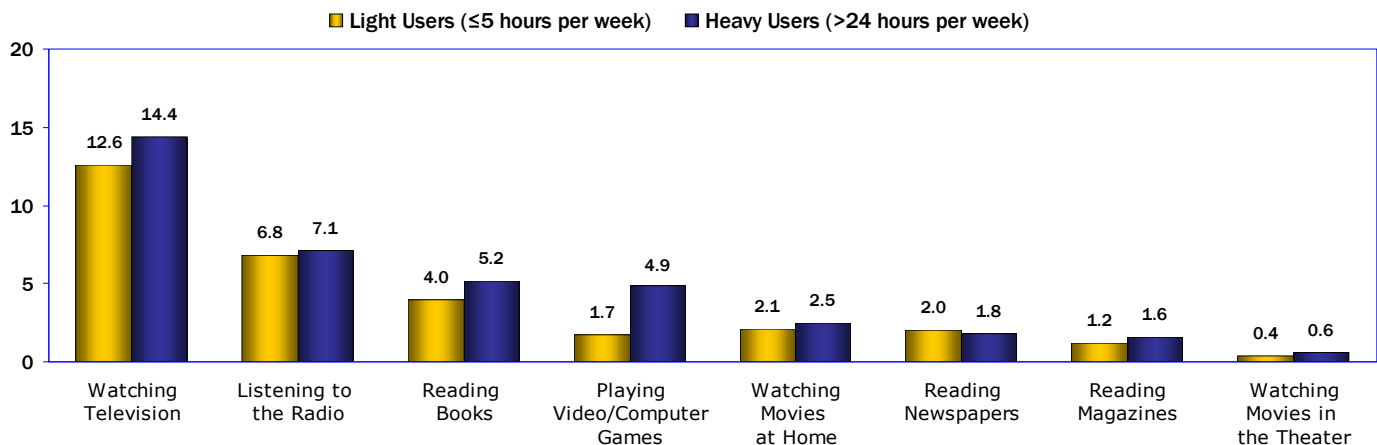


(Q690 M-1)

Offline Media: Light Users Vs. Heavy Users

In general, light users and heavy users reported similar amounts of time involved in media while offline, with the exception of time devoted to video games.

**Leisure Time Spent Weekly on Media Activities While Not Online?
(Light Users vs. Heavy Users, Number of Hours)**



(Q690 M-2)

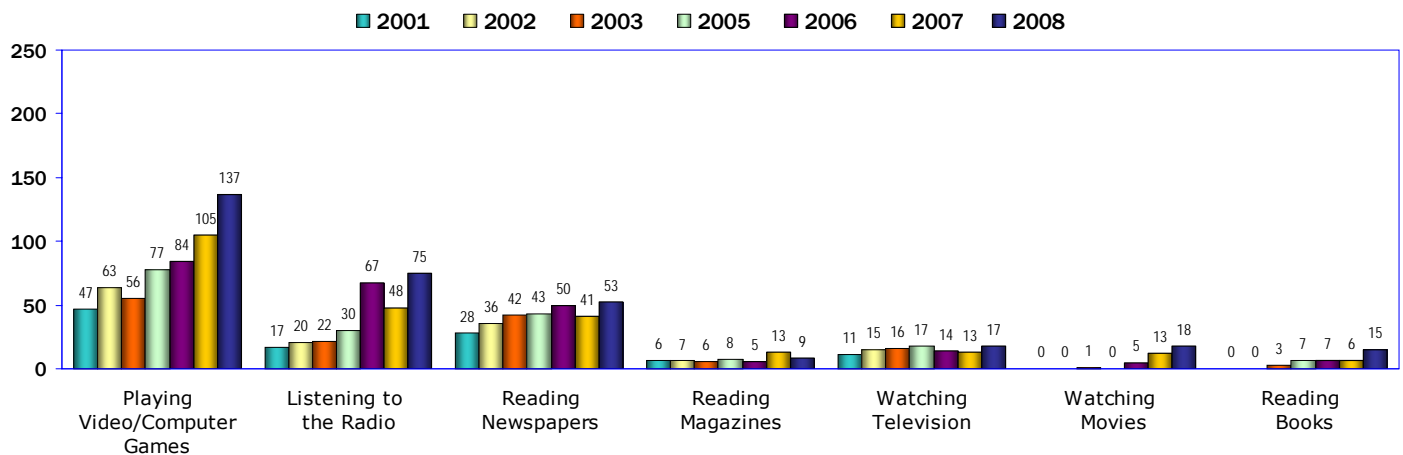
Trends In Online Media Use

Looking at the use of online media, Internet users in the current Digital Future study reported increases in their time involved in most online media.

Users reported spending the largest amount of time spent playing online video games -- up more than 32 minutes per week compared to 2007. Users also reported large increases in listening to online radio -- up 27 minutes in the current study.

In what could be considered evidence of the ongoing decline of printed newspapers, users reported large increases in weekly reading of online newspapers -- at 53 minutes per week, the highest level thus far in the seven Digital Future studies in which this question was asked. Other peak levels for the Digital Future studies were also reported for reading online magazines, and watching online television and online movies.

**Use of Online Media, Weekly Minutes
(Internet Users)**



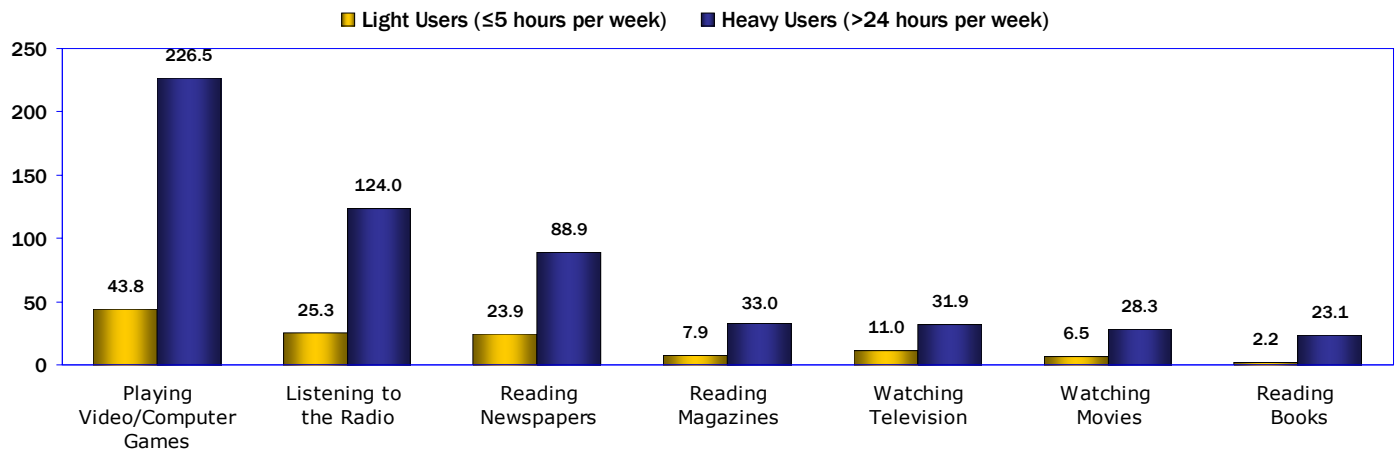
(Q700 Q5V2: B M-3)

Media Online: Light Users Vs. Heavy Users

Light users and heavy users reported extremely large differences in their use of online media, with heavy users reporting higher levels of use of all principal online media.

Heavy users spend much more time per week than light users playing online video games -- 183 minutes more per week. Heavy users also spend 99 more minutes listening to online radio and 65 more minutes reading online newspapers than do light users.

**Use of Online Media, Weekly Minutes
(Light Users Vs. Heavy Users)**



(Q700 Q5V2:B M-2)

Does Online Content Lead to Cancelled Print Subscriptions?

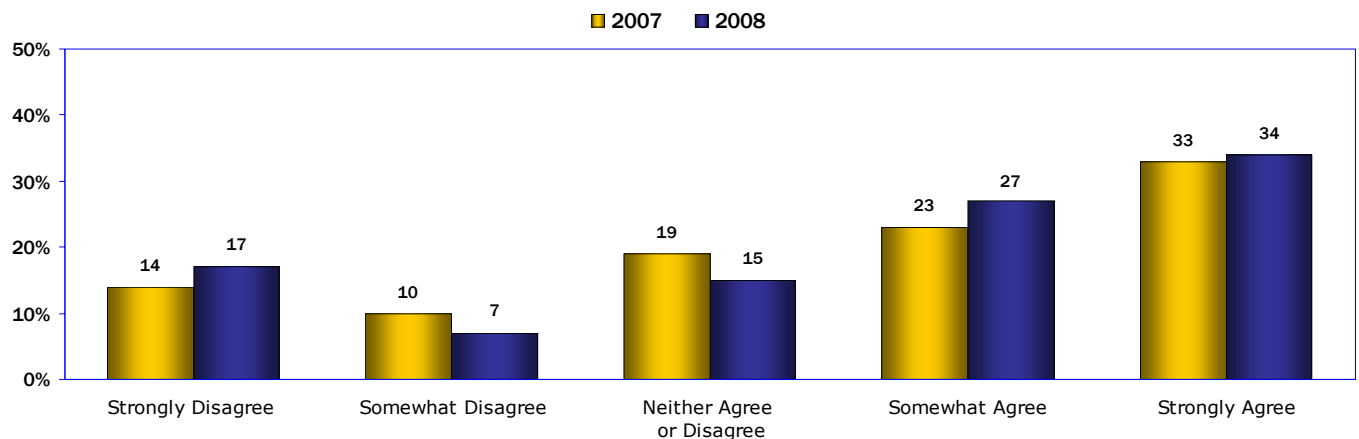
In the current study, 22 percent of Internet users said they stopped a subscription for a newspaper or magazine because they now get the same or related content online (Q534D M-4).

Would You Miss The Print Edition Of Your Newspaper?

Even though Internet users reported devoting significant amounts of time to reading online newspapers, when asked if they would miss the print edition of their newspaper if it were no longer available, 61 percent those who read newspapers offline agreed -- up from 56 percent in 2007.

Twenty-four percent said they would not miss the print edition of their newspaper, the same percentage as in 2007.

I Would Miss the Print Edition of My Newspaper if it was No Longer Available
(Internet Users Who Read Newspapers Offline)



(Q703 JC-2)

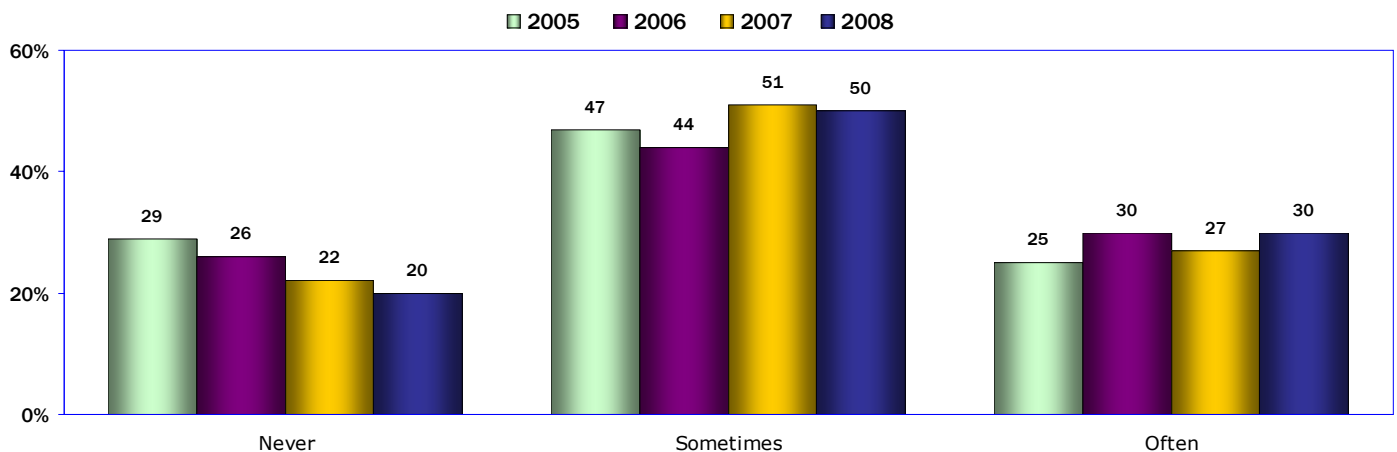
Surfing The Web

Web surfing -- exploring the Internet without a specific destination -- continues to be a favorite activity for Internet users. Even though already large percentages of users in the three previous Digital Future studies said that they go online without a specific destination, in the current study the percentage has reached its highest level.

In the current Digital Future study, 80 percent of Internet users sometimes or often go online without a specific destination in mind, up marginally from 78 percent in 2007.

Only 20 percent of Internet users never go online without a specific destination.

**How Often Do You Go Online Without a Specific Destination?
(Percentage of Internet Users)**

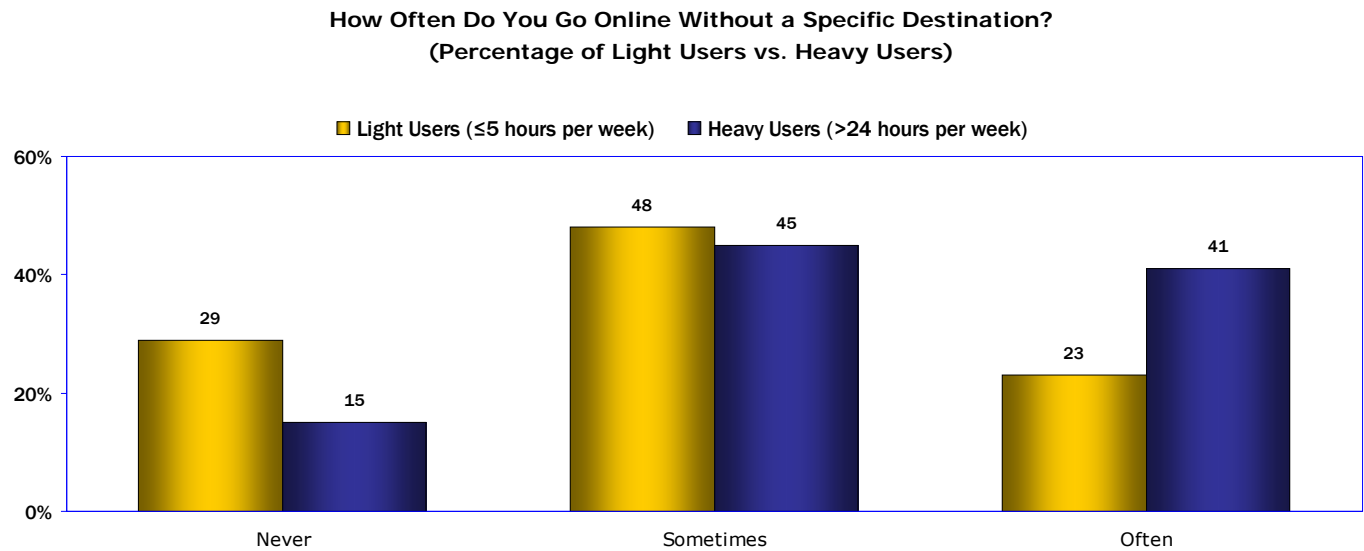


(Q292 M-3)

Surfing The Web: Light Users vs. Heavy Users

Not surprisingly, large percentages of light users and heavy users alike go online without a specific destination.

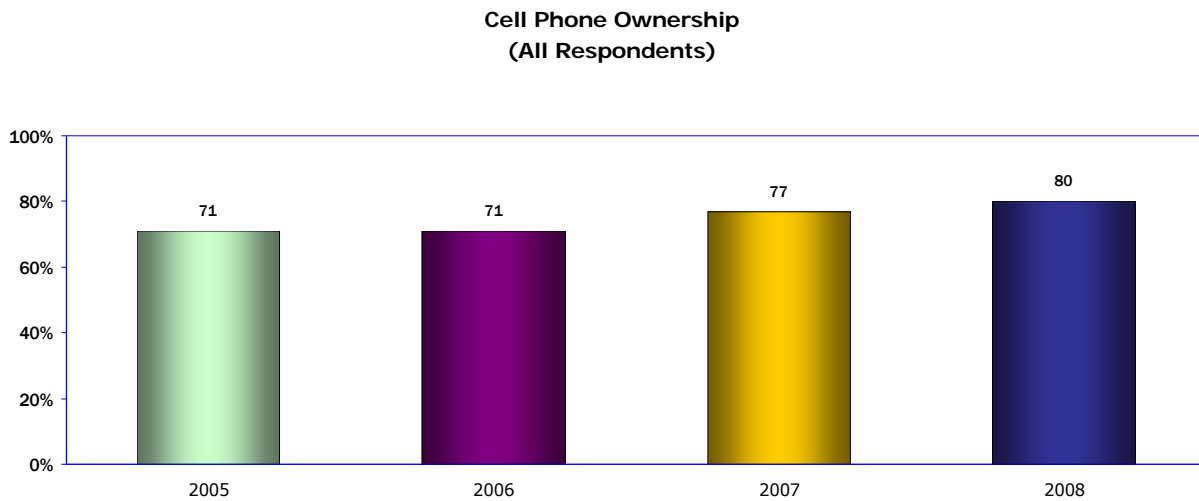
Eighty-six percent of heavy users sometimes or often surf the Web without a specific destination, compared to 71 percent of light users.



(Q292 M-2)

Do You Have a Cell Phone?

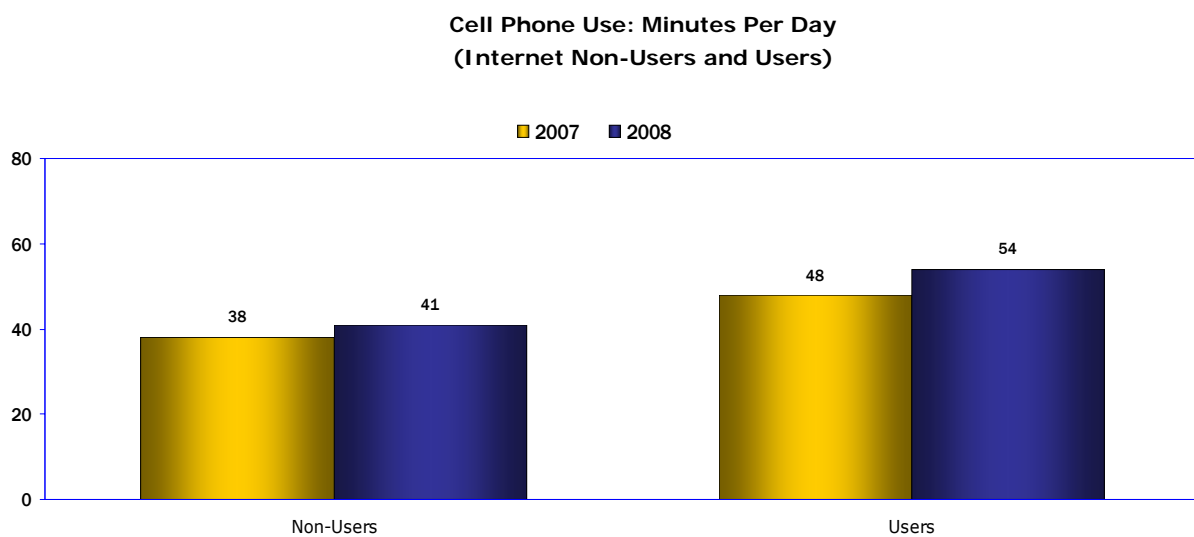
Cell phone ownership among Americans continues to increase, and has now reached 80 percent of respondents -- up from 71 percent four years ago.



(Q145 M-2)

Cell Phone Use

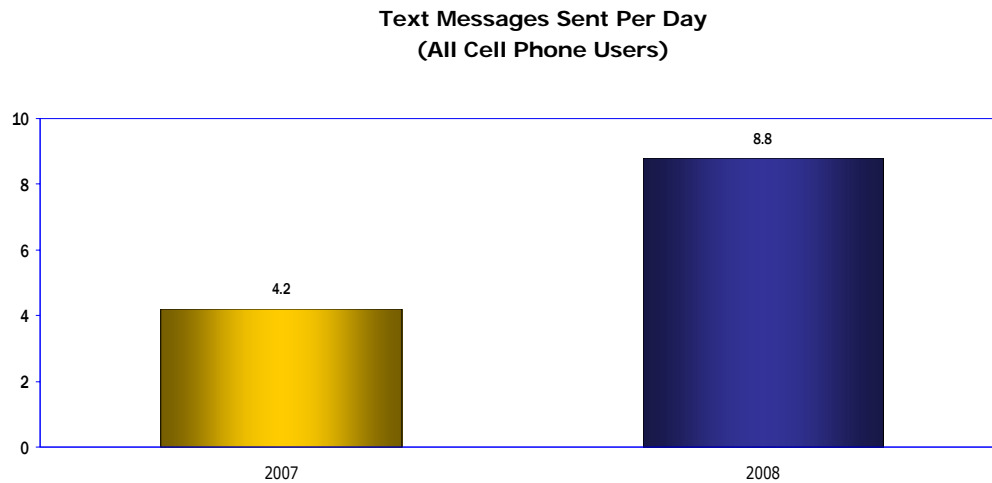
Internet users and non-users alike reported increased time using their cell phones over 2007, with Internet users reporting an average of 13 minutes per day more online than non-users.



(Q148A M-2)

Cell Phones and Text Messages

Cell phone users are busy text messengers and their use of text messaging has grown dramatically over 2007. In the current study, cell phone users average nine text messages per day, more than double the number of the previous study.

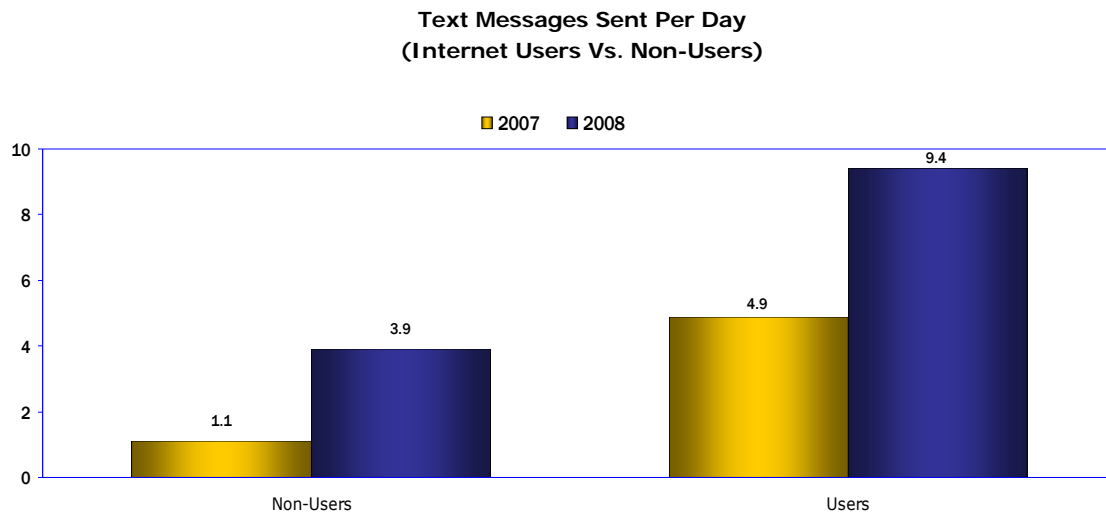


(Q148B M-1)

Cell Phones and Text Messages: Non-Users Vs. Users

The use of text messaging is growing for Internet users and non-users alike.

Although users in the current Digital Future study reported sending more than twice as many text messages as non-users, both categories of cell phone users reported large increases in the number of text messages they send over 2007.



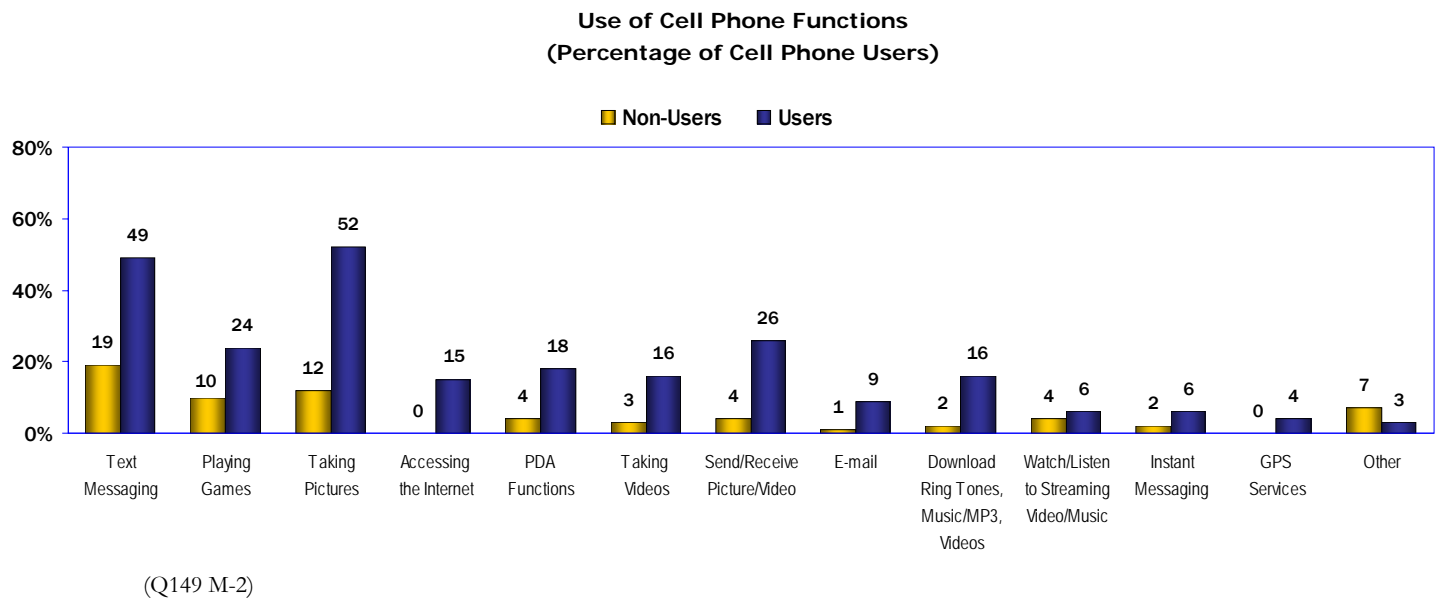
(Q148B M-2)

Use of Cell Phone Functions: Non-Users Vs. Users

As cell phones are equipped for a variety of tasks besides talking, cell phone owners reported a range of uses, with taking pictures and text messaging the top two most popular activities for both Internet users and non-users.

Internet users reported much higher levels of accessing all cell phone services than do non-users.

Only 15 percent of Internet users with cell phones reported going online with their phones.

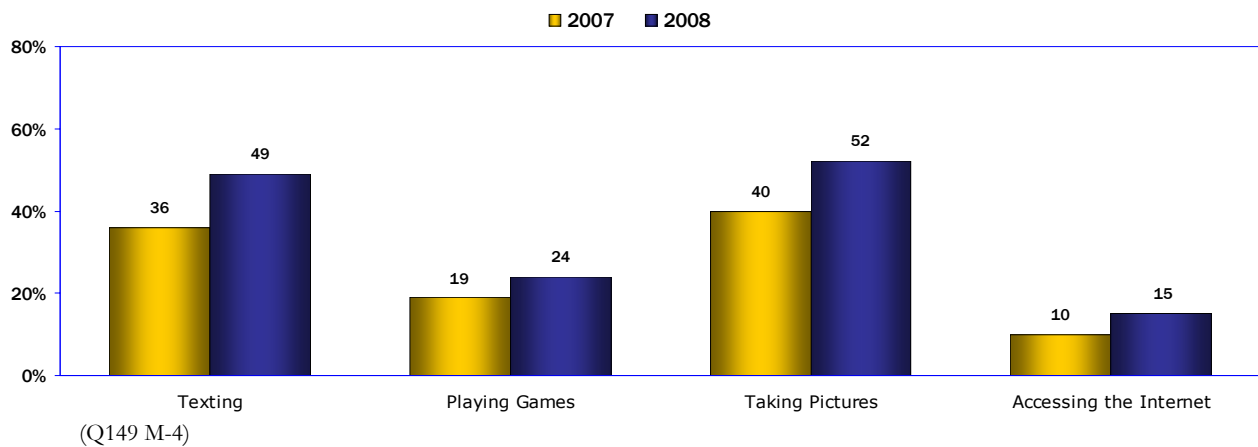


Use of Cell Phone Functions

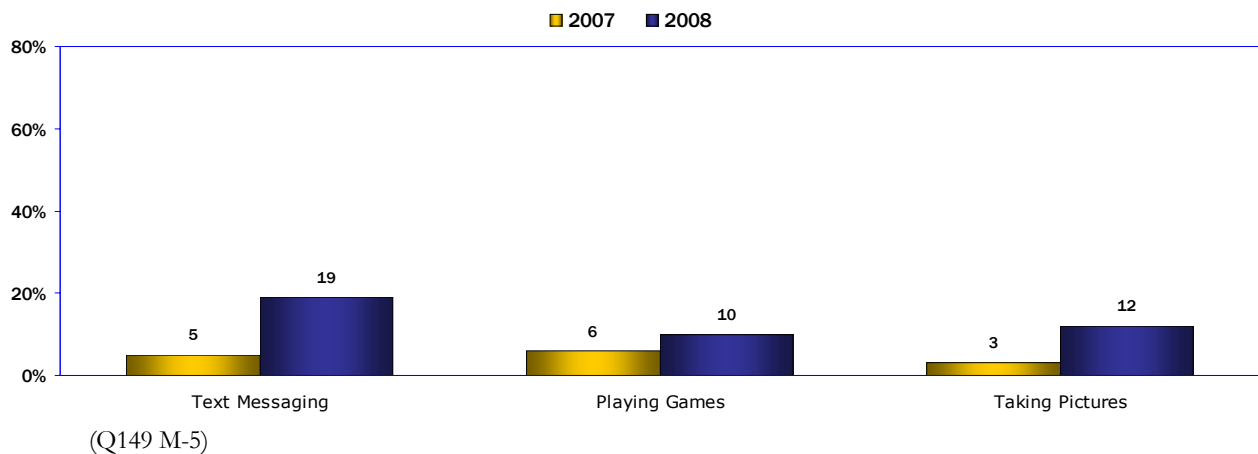
Cell phone users who also go online reported increased use over 2007 of the some cell phone functions -- in particular, texting and taking pictures.

Smaller percentages of cell phone users who do not go online (see lower chart) in the current study also reported using a variety of phone functions, with large increases over 2007 in text messaging and taking pictures.

Use of Cell Phone Functions
(Percentage of Cell Phone Users Who are Internet Users)



Use of Cell Phone Functions
(Percentage of Cell Phone Users who are Internet Non-Users)

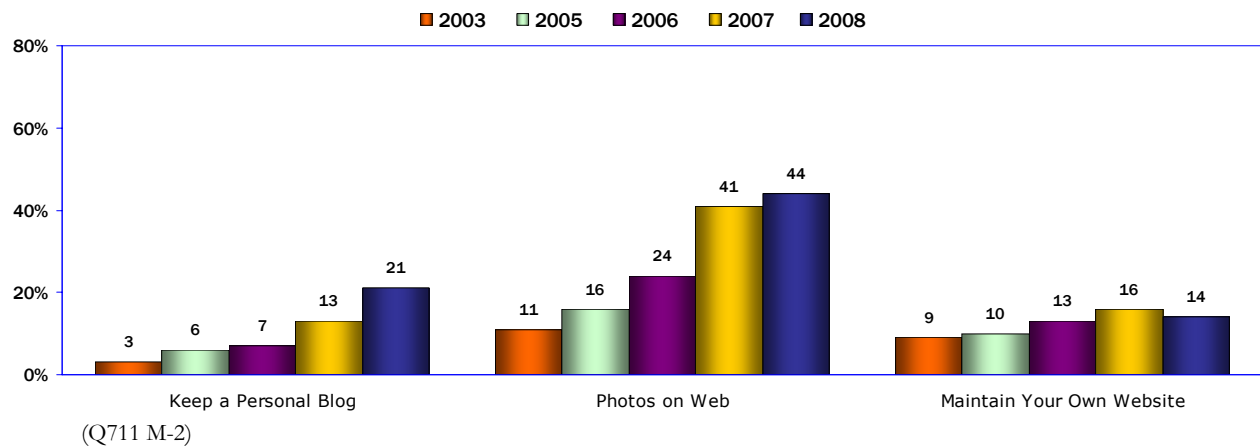


Posting Information Online: Blogs, Photos, and Maintaining Personal Web Pages

Distributing content created by Internet users on a blog, through a display of photos, or on a user's personal Web page, continues to increase. In the current Digital Future study, 44 percent of Internet users said they post photos online -- four times as many as in 2003.

The percentage who keep a personal blog, although still less than one-quarter of users, increased substantially in the current study.

Posting Information Online: Blogs, Photos, Personal Web Sites
(Percentage of Internet Users)



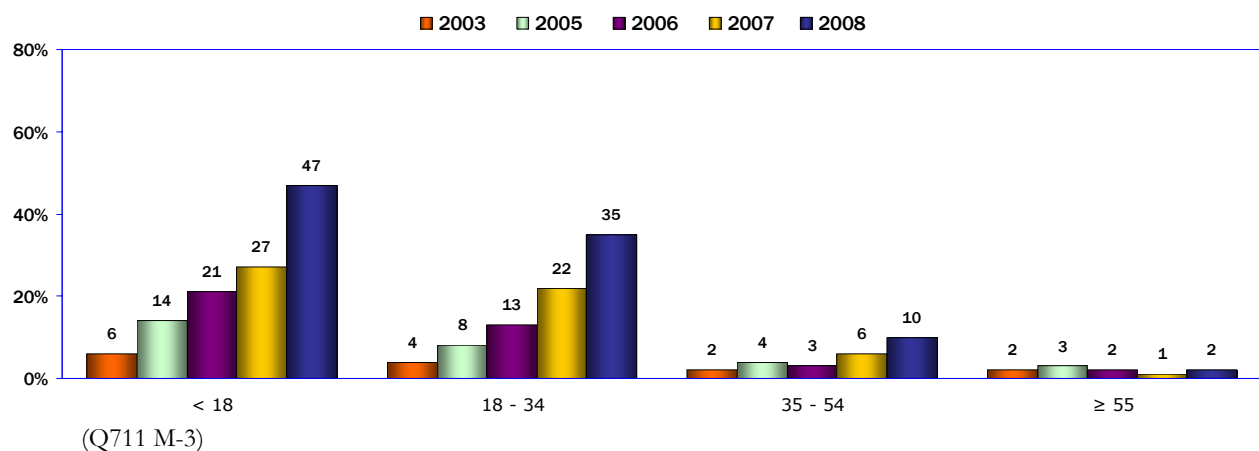
Posting Information On Personal Blogs; Posting Photos (By Age)

The younger the Internet users, the more likely they are to post personal information online. However, looking at the responses of Internet users who post personal information shows marked differences in the types of information that users in various age groups are posting.

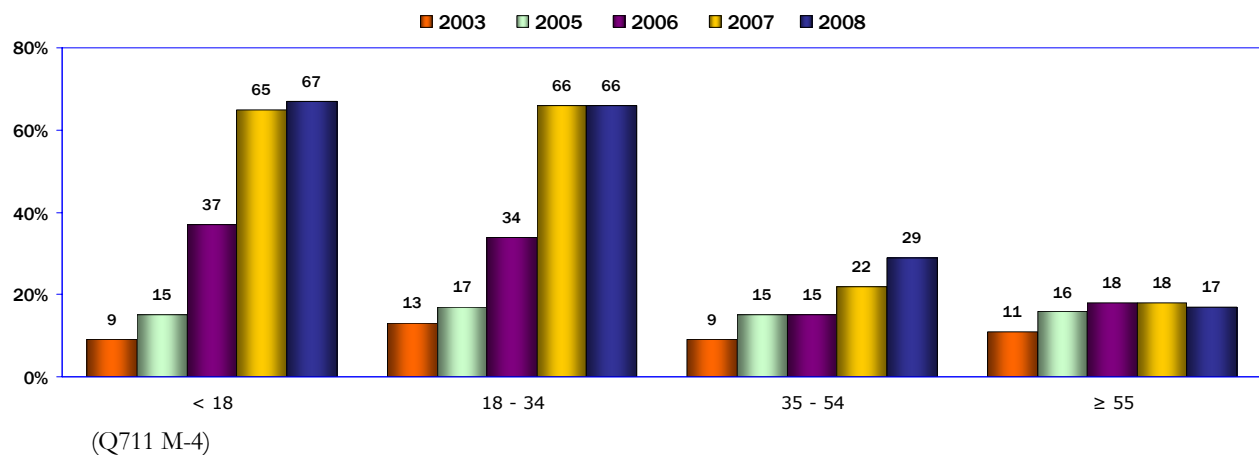
While Internet users of all ages post blogs, users under 18 are most likely to post them. Forty-seven percent of Internet users under 18 maintain a personal blog -- more than double the percentage of only two years ago, and significantly higher than users in any other age group.

But when asked about displaying photos online (see lower chart), near-identical percentages of users under 18, and those between 18 and 34, said they post photos online, and the percentages are virtually unchanged from 2007.

Do You Keep A Personal Blog?
(Percentage of Internet Users By Age)



Do You Display Photos Online?
(Percentage of Internet Users by Age)



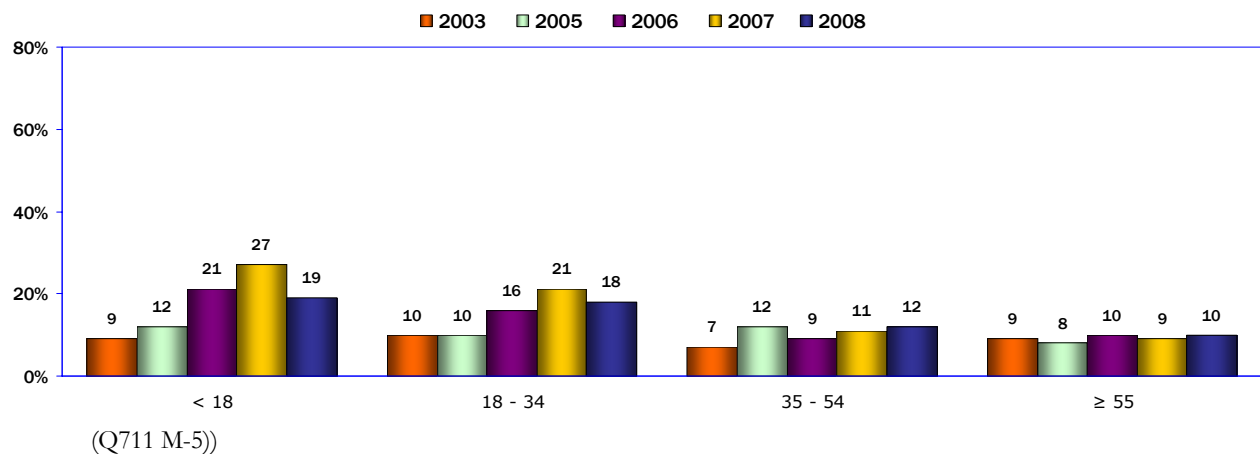
Maintaining Personal Web Sites (by age)

While younger users reported much higher percentages of posting personal blogs and displaying photos online, the number who maintain a personal Web site is declining,

The percentage of users under 18 who maintain a personal Web site dropped to under 20 percent in the current study after peaking in 2007. Among users 18 to 34, the percentage also declined to under 20 percent.

In other age ranges, the percentage of users who maintain a personal Web site is generally unchanged.

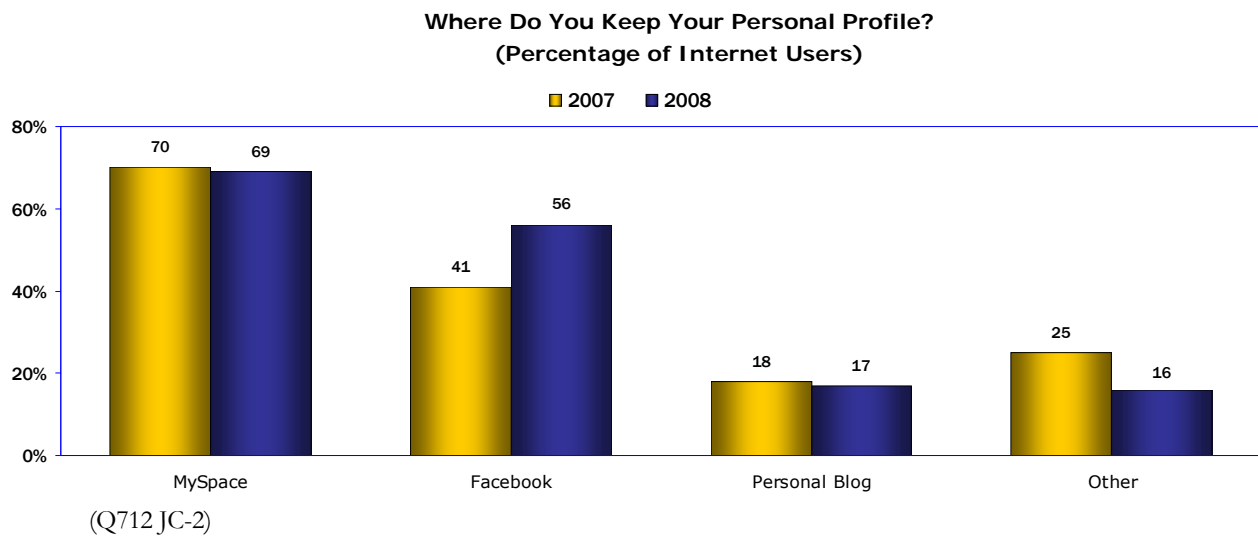
**Do You Maintain Your Own Web Site?
(Percentage of Internet Users By Age)**



Personal Profiles: Where are They Located?

Of Internet users who maintain a personal profile online, 69 percent keep that profile on MySpace -- a level of response generally unchanged from 2007.

A growing percentage of Internet users in the current Digital Future study said they keep their profile on Facebook, while a smaller percentage (17 percent) store it in their personal blog.



Consumer Behavior

Adult Internet users who buy online **65%**

Average online purchases per year **34**

Internet users who said that online purchasing has reduced their buying in traditional retail stores somewhat or a lot **69%**

Respondents who are very concerned or extremely concerned about the privacy of personal information when buying online **55%**

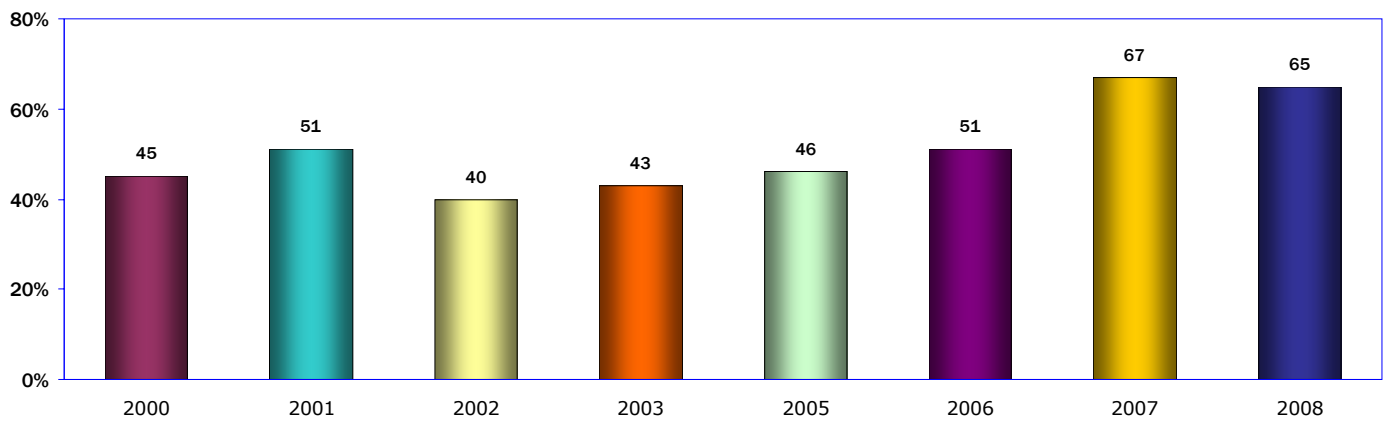
Respondents who are very concerned or extremely concerned about the security of credit card information when buying online **52%**

Internet users who:
never click on Web advertisements **52%**
sometimes or often click on Web ads **6%**

Who Is Buying Online?

Almost two-thirds (65 percent) of Internet users also buy online in spite of slumping economic conditions.

Online Purchasers
(Percentage of Adult Internet Users)



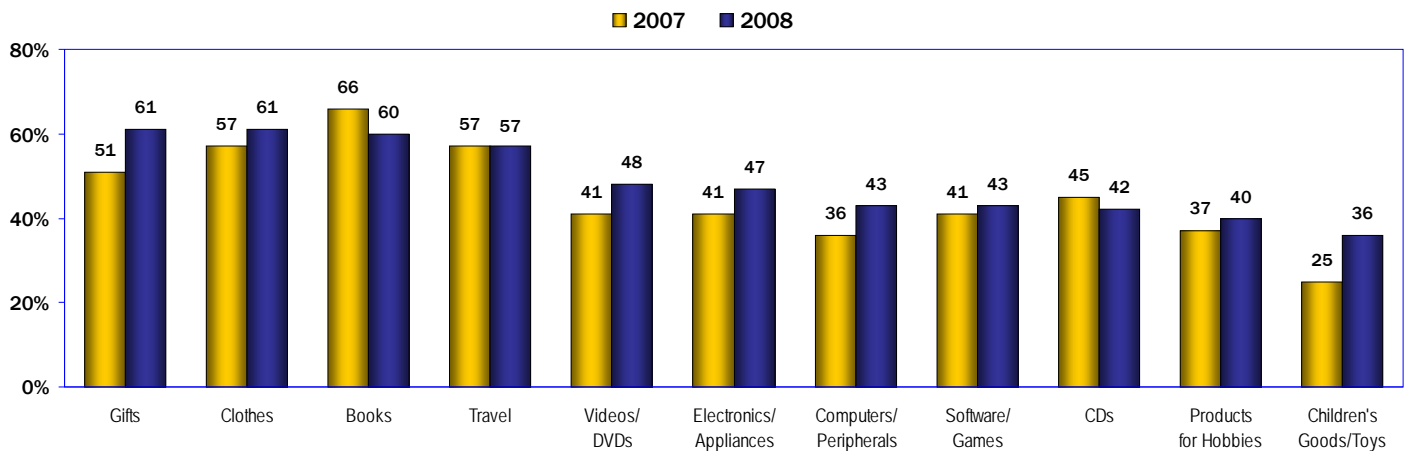
(Q770 M-2)

Types of Online Purchases

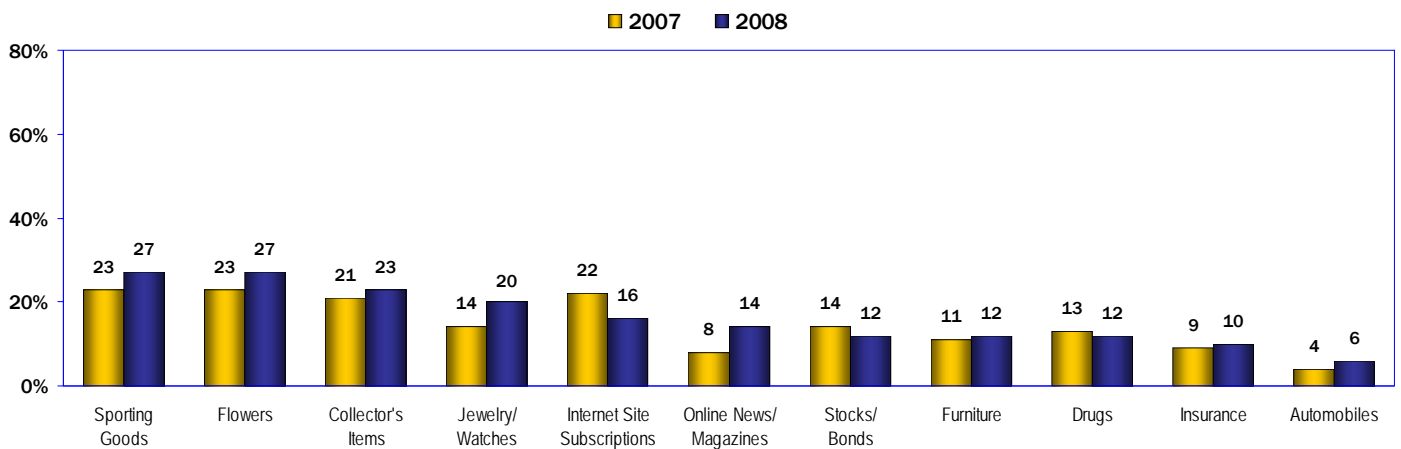
The most popular online purchases are clothes or gifts, bought by 61 percent of Internet users who buy online, followed closely by books (60 percent, down from its number one position of 66 percent in 2007).

Travel arrangements was the only other category of purchase cited by more than half of Internet purchasers (57 percent).

Most Popular Online Purchases
(Percentage of Internet Users Who Buy Online)



(Q810 M-2a)

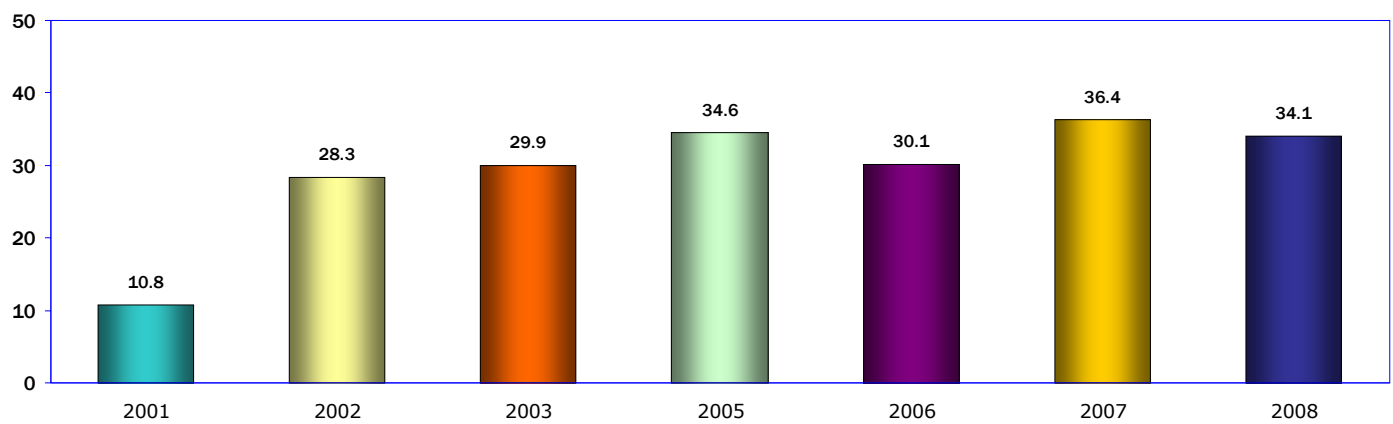


(Q810 M-2b)

Online Purchasing Frequency

The average number of annual online purchases for Internet users age 18 and above decreased slightly in the current Digital Future study, down from the peak number in 2007.

**Online Purchasing Frequency
(Annual Purchases by Adults)**



(Q 780 M-1)

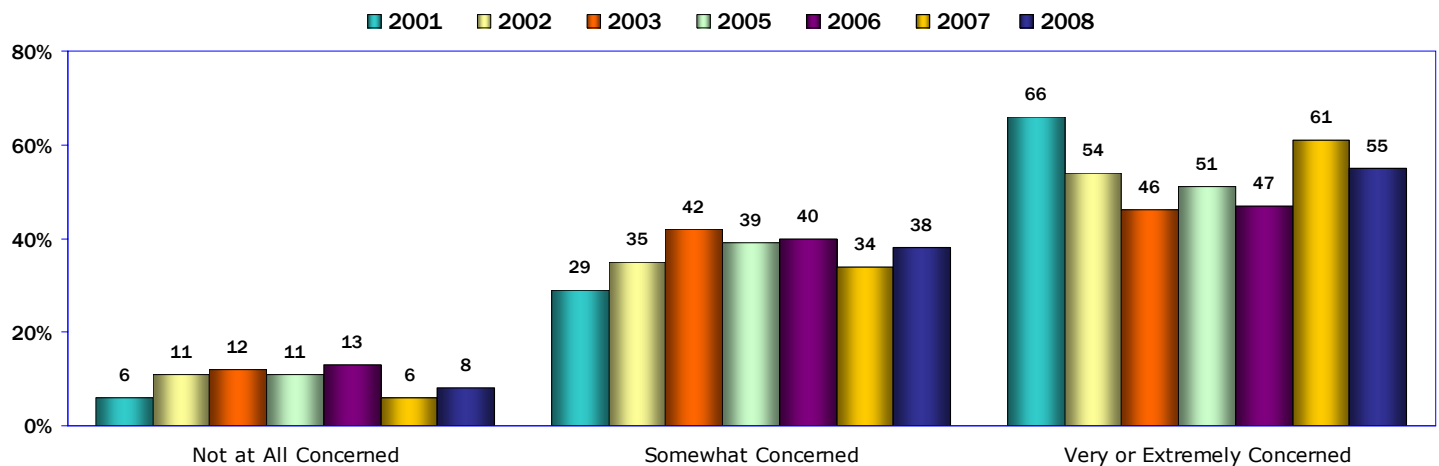
Privacy Concerns When Buying Online

Privacy and security while online have been reported as major concerns in each of the eight Digital Future studies. Almost all respondents continue to report some level of concern about the privacy of their personal information when or if they buy on the Internet.

The level of that concern, while high, had been declining modestly in the early years of the Digital Future studies. That decline reversed in 2007, with overall concern at its highest point since the first year of the Digital Future Project; in the current study, that concern remained almost as high.

The total percentage of respondents who reported some level of concern about the privacy of personal information (somewhat, very, or extremely concerned) reached 93 percent -- almost as high as the 95 percent in 2007.

Concerns about Privacy of Personal Information when Buying Online
(Percentage of All Respondents, Age 16 or Older)

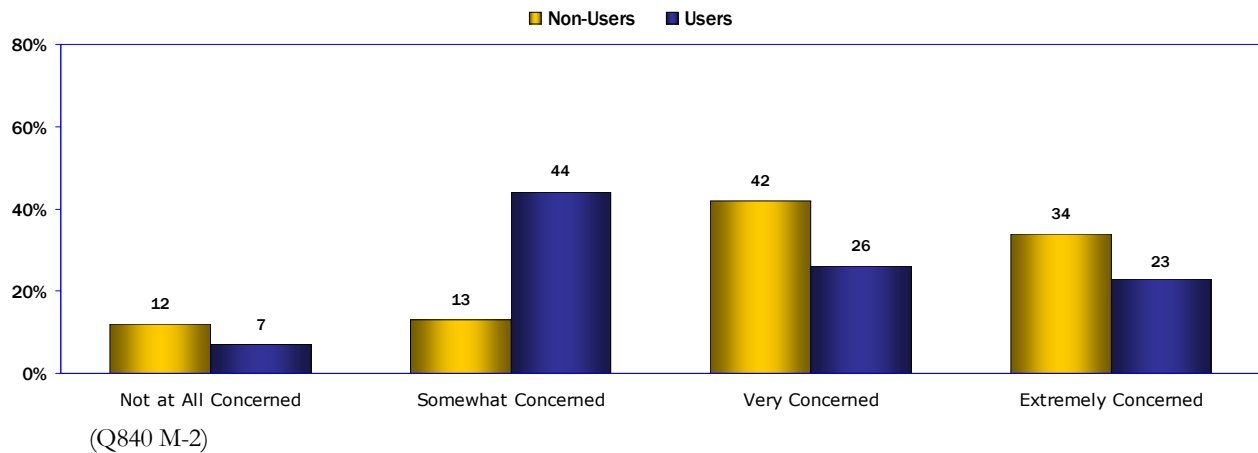


(Q840 M-1)

Privacy: Comparing Concerns Among Users vs. Non-Users

Users and non-users express disparate views regarding their concerns about privacy of personal information if or when buying online. Forty-nine percent of users reported the highest level of concern (very concerned or extremely concerned) compared to 76 percent of non-users.

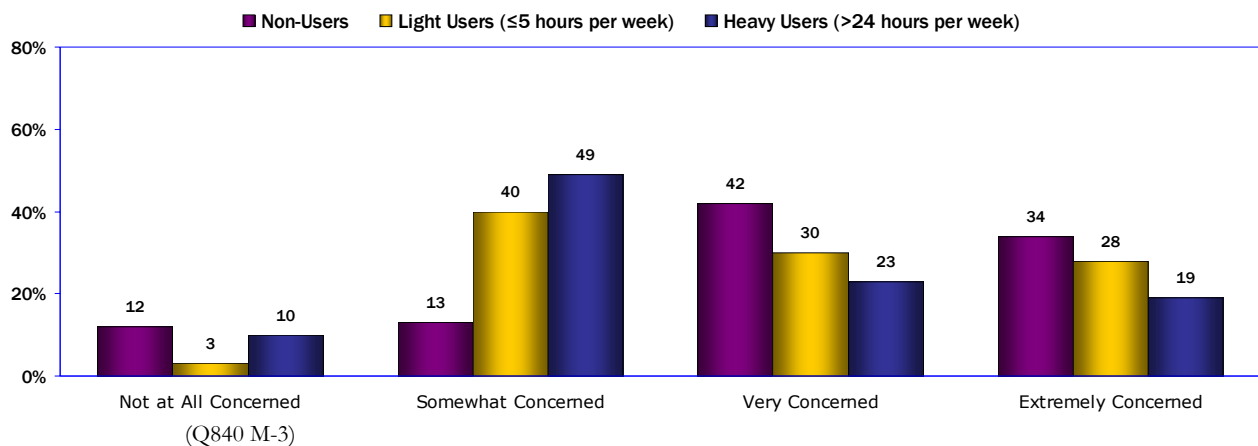
**Concerns about Privacy Of Personal Information when or if Buying Online
(Percentage of Respondent Age 16 and Older: Internet Users vs. Non-Users)**



Privacy: Comparing Concerns Among Non-users, Light Users, Heavy Users

Looking at the views of non-users, light users, and heavy users shows that concerns about privacy of personal information decreases as Internet use increases. Looking at those who are very concerned or extremely concerned, non-users reported the largest percentage (76 percent), followed by light users (58 percent), and heavy users (42 percent).

**Concerns about Privacy of Personal Information when or if Buying Online
(Percentage of Internet Non-Users, Light Users, Heavy Users)**



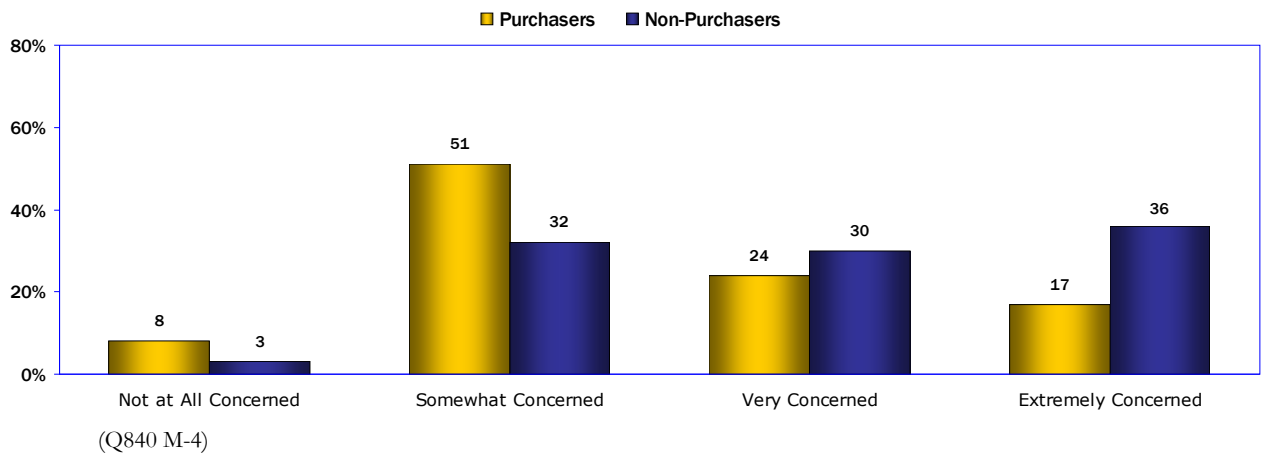
Privacy Concerns: Internet Non-Purchasers Vs. Purchasers

Internet purchasers reported much lower percentages of the highest levels of concern compared to non-purchasers.

Forty-one percent of Internet purchasers reported being very or extremely concerned about the privacy of personal information when buying online, compared to 66 percent of non-purchasers.

Almost triple the Internet purchasers compared to non-purchasers said they are not at all concerned about the privacy of personal information when buying online.

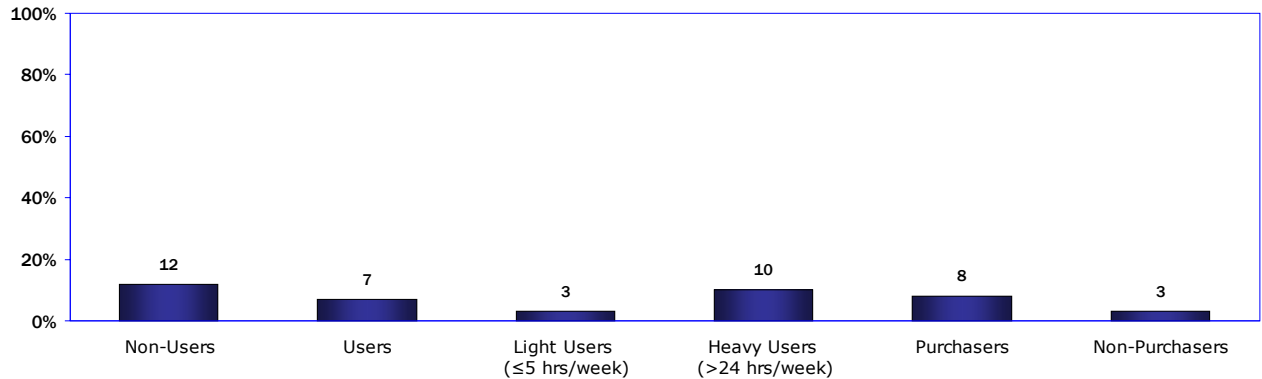
**Concerns about Privacy of Personal Information when Buying Online
(Internet Purchasers vs. Non-Purchasers)**



At a Glance: Comparing Privacy Concerns

Comparing privacy concerns among six categories of respondents, heavy users reported the largest percentage with no concerns (10 percent).

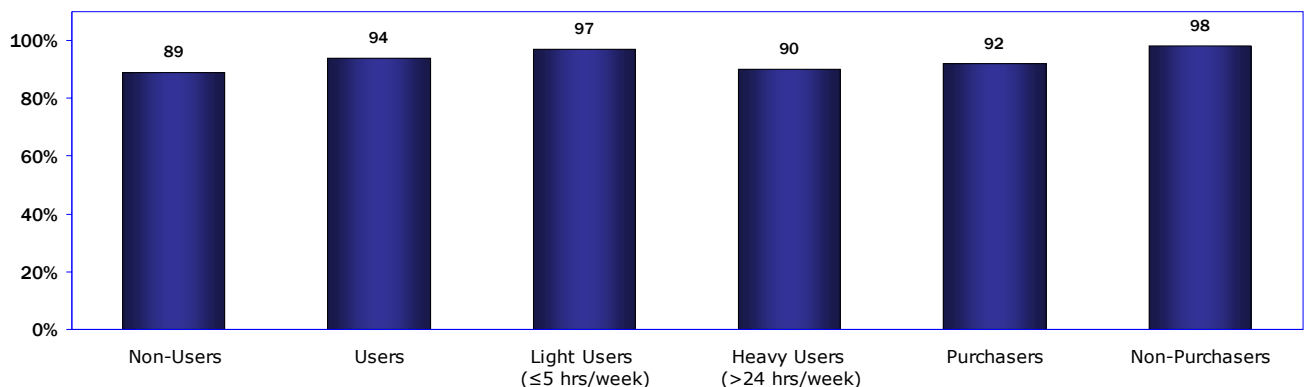
**Concerns about Privacy Of Personal Information when Buying Online
(Percentages Responding Not at All Concerned)**



(Q840 Combined)

A large percentage of each respondent group reported concerns about privacy when buying online (89 percent or more). The largest percentage of those concerned are the non-purchasers (98 percent), with light users reporting the second highest percentage (97 percent).

**Concerns about Privacy of Personal Information when Buying Online
(Percentages Responding Somewhat Concerned, Very Concerned, Extremely Concerned)**

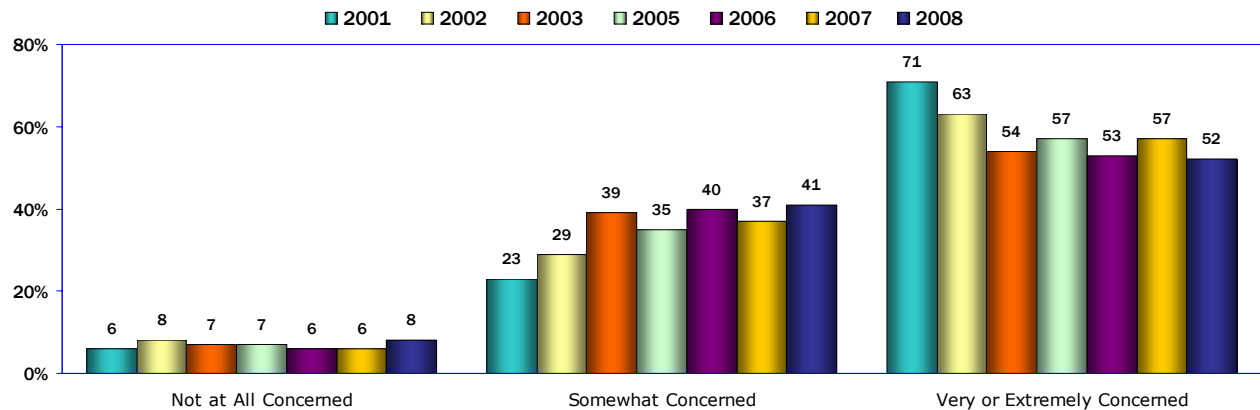


(Q840 Combined)

Credit Card Information: Concerns About Security

Concerns about credit card security when or if buying online have been high among all respondents in all of the Digital Future studies. Among all respondents in the current study, 93 percent reported some level of concern about credit card security when or if they buy online -- about the same as the 94 percent reported in 2007.

Concerns about Credit Card Security when or if Buying Online
(Percentage of Adult Respondents)



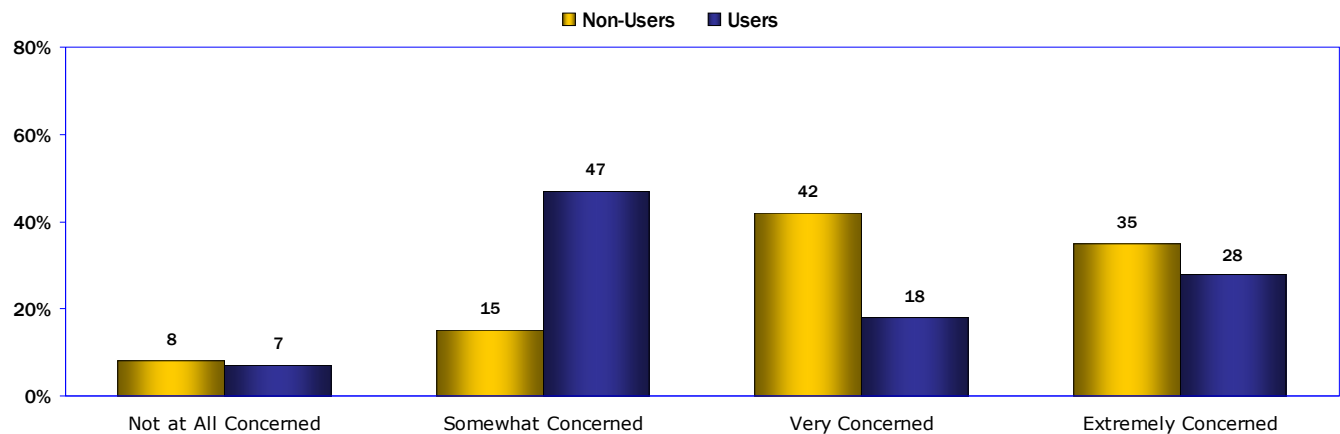
(Q830 M-1)

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.

In the current Digital Future Project, 77 percent of non-users said they are very concerned or extremely concerned about their credit card information when or if buying online, compared to 46 percent of users who reported the same response.

**Concerns about Credit Card Security when or if Buying Online
(Percentage of Adult Users vs. Non-Users)**



(Q830 M-2)

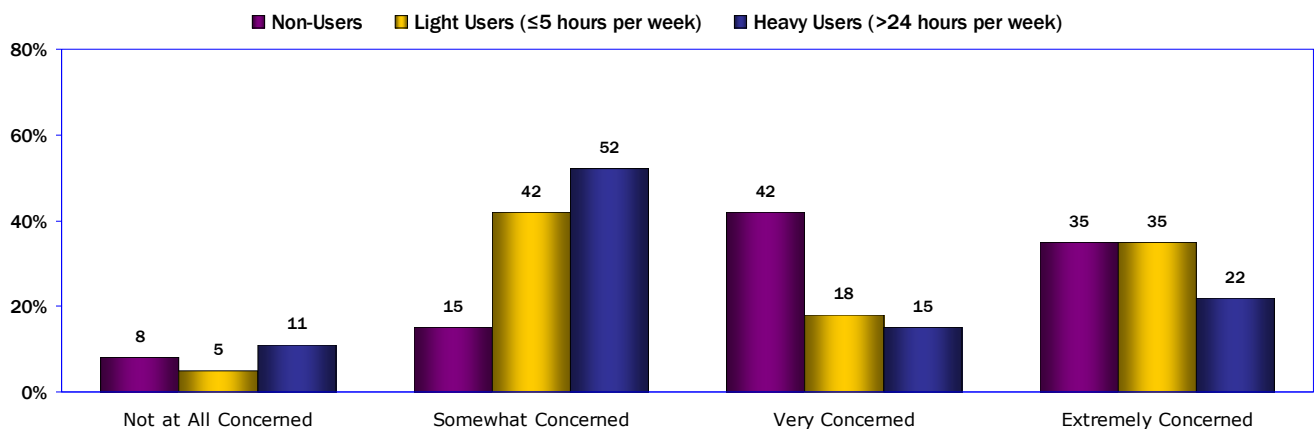
Credit Card Information: Comparing Concerns Among Non-Users, Light Users, Heavy Users

As in the comparison of the view among Internet non-users, light users, and heavy users about the privacy of their personal information while online (see page 101), the highest levels of concern about credit card information when or if buying online decrease as Internet use increases.

In the current Digital Future Project, 37 percent of heavy users said they are very concerned or extremely concerned about credit card security when or if buying online -- compared to 53 percent of light users and 77 percent of non-users.

Yet when looking at total levels of concerns, all three groups of respondents reported only marginally different levels of total concern: 89 percent for heavy users, 95 percent for light users and 92 percent for non-users. Moreover, the largest percentage of “somewhat concerned” was reported by heavy users -- more than half of them (52 percent).

**Concerns about Credit Card Security when or if Buying Online:
(Percentage of Adult Non-Users, Light Users, Heavy Users)**



(Q830 M-3)

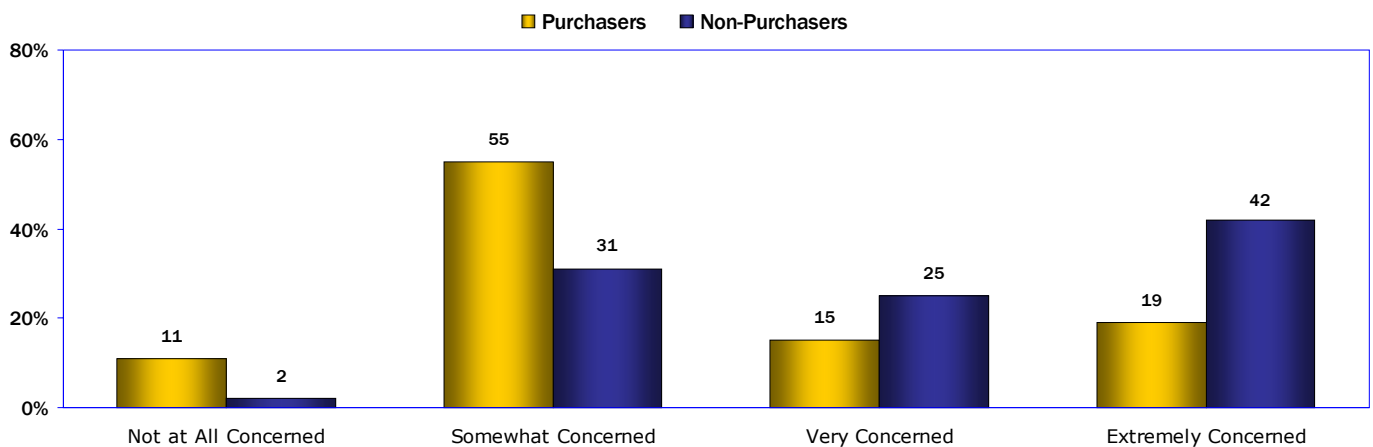
Credit Card Information: Comparing Concerns Among Non-Purchasers And Purchasers

Non-purchasers reported much higher levels of concern than purchasers about credit card security.

Among online purchasers, 34 percent said they are very concerned or extremely concerned about credit card security when or if buying online -- this compared to two-thirds (67 percent) of non-purchasers.

Notably, only two percent of Internet users who do not buy online said they are not at all concerned about credit card security.

**Concerns about Credit Card Security when or if Buying Online
(Percentage of Adult Non-Purchasers Vs. Purchasers)**



(Q830 M-4)

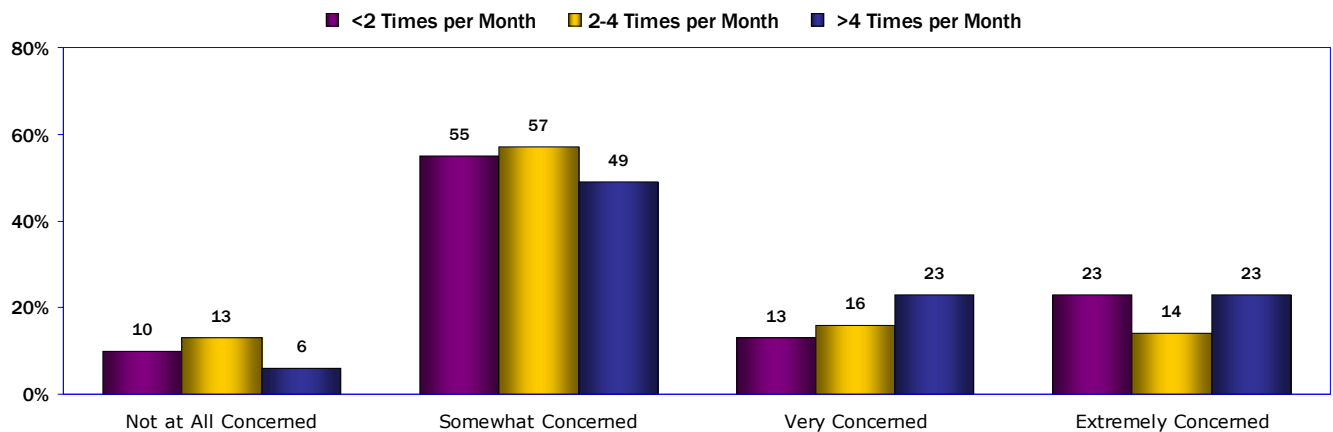
Credit Card Information: Comparing Concerns Based on Frequency of Purchasing

While online experience tends to reduce concerns about credit card use, frequent purchasing on the Internet does not.

Those who buy online most frequently reported the highest percentage of concern about security.

Among online purchasers, 46 percent of those who buy more than four times per month said they are very concerned or extremely concerned about credit card security when buying online, compared to 30 percent of users who buy 2-4 times per month and 36 percent of those who buy less than twice per month.

**Concerns about Credit Card Security when Buying Online:
(Percentage of Internet Purchasers)**



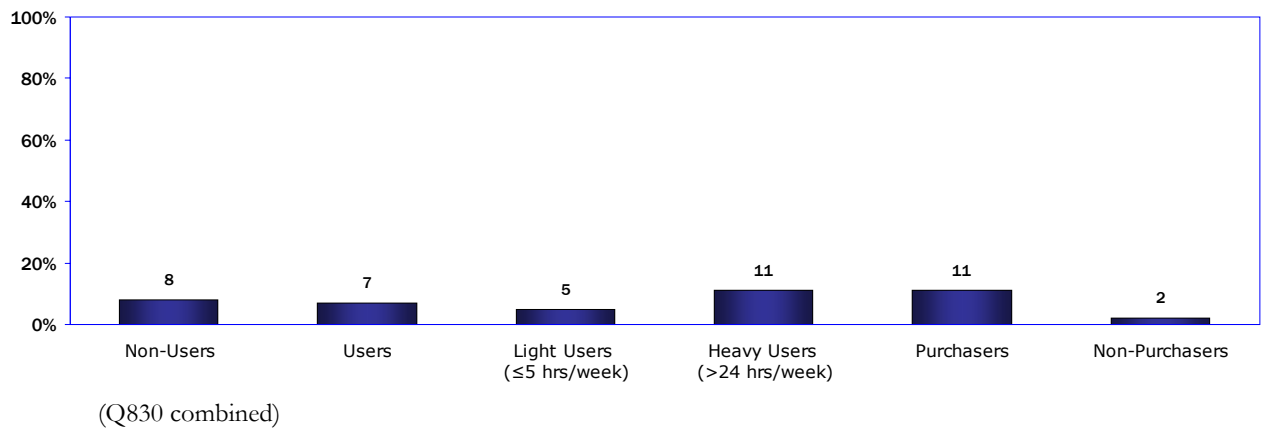
(Q830 M-6)

At a Glance: Comparing Concerns Credit Card Security

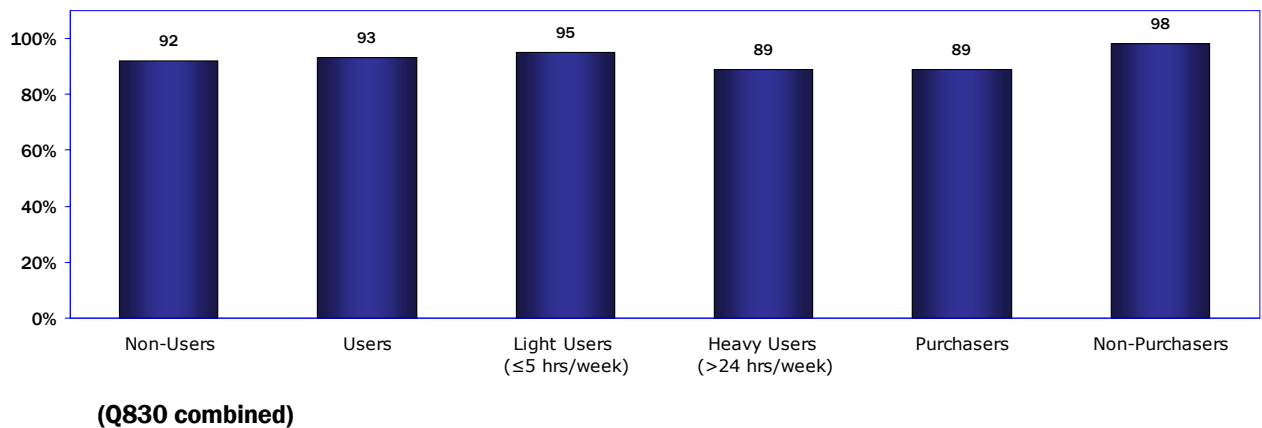
Even though concerns about privacy when buying online remain quite high, a comparison of various groups of respondents shows that the largest percentages who reported no concerns are heavy users and online purchasers (11 percent for each).

As with responses about online privacy (see page 104), the largest percentage reporting concerns are the non-purchasers (98 percent -- see lower chart).

Concerns about the security of Privacy Of Personal Information when or if Buying Online
(Percentage of Adult Respondents Saying Not at All Concerned)



Concerns about Privacy Of Personal Information when or if Buying Online
(Percentage of Adult Respondents Saying Somewhat Concerned, Very Concerned, Extremely Concerned)



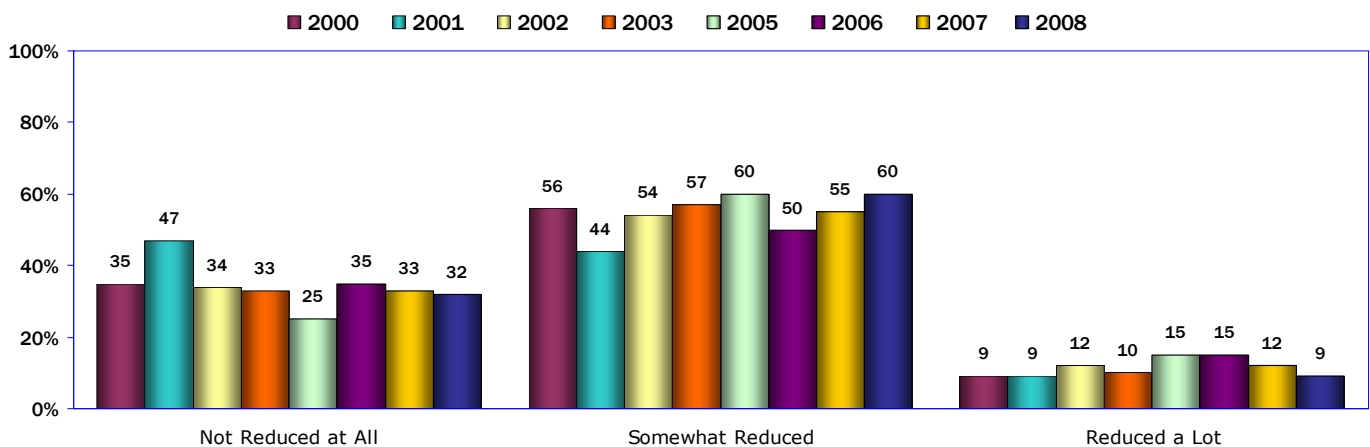
Buying Online: Effects on Traditional Retail Purchasing

A large and growing percentage of online purchasers continues to report that their purchasing online has reduced their buying in retail stores.

In the current study, 69 percent of Internet users who buy online said that online purchasing has reduced their buying in traditional retail stores somewhat or a lot -- up marginally from 67 percent in 2007. However, the percentage who said their purchasing was reduced a lot has declined for the second consecutive year.

The percentage who said that their purchasing was not reduced at all declined marginally for the second consecutive year, and is now below one-third of all online buyers.

Does Buying Online Affect Purchasing in Traditional Retail Stores?
(Percentage of Internet Users Who Buy Online)



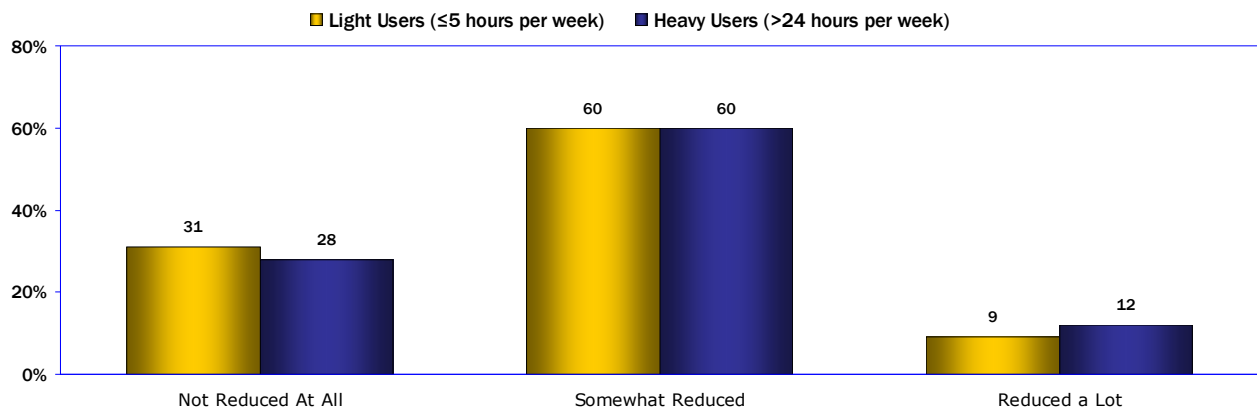
(Q860 M-3)

Buying Online: Effects on Traditional Retail Purchasing Light Users Vs. Heavy Users

Similar percentages of light users and heavy users said that their online buying has affected purchasing in traditional retail stores.

Seventy-two percent of heavy users said their online purchasing has reduced purchasing in traditional stores somewhat or a lot, compared to 69 percent of light users.

Does Buying Online Affect Purchasing in Traditional Retail Stores?
(Percentage of Internet Users Who Buy Online: Light Users vs. Heavy Users)



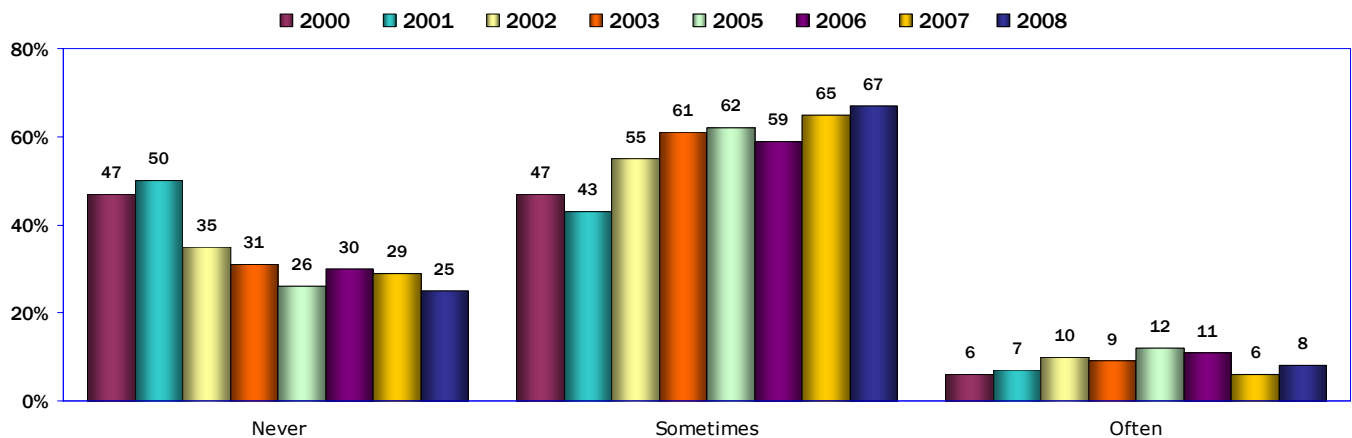
(Q860 M-2)

Browsing For Products: Retail Stores Vs. The Internet

Very large percentages of Internet users said they browse in stores and then buy online, and vice versa.

In the current Digital Future Project, three-quarters of Internet purchasers said they sometimes or often browse in traditional retail locations and then buy online – up from 71 percent in 2007.

Percentage of Internet Buyers Who Browse in Stores, then Buy Online

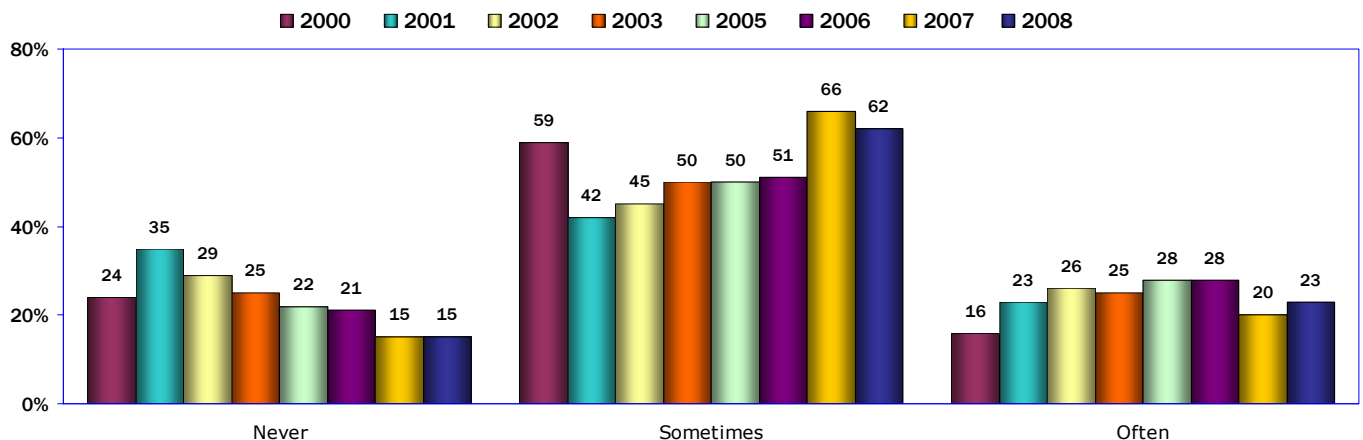


(Q900 M-3)

As in previous Digital Future studies, high percentages of respondents said they use the Internet for browsing before buying in stores.

Eighty-five percent of Internet users said they sometimes or often browse online and then buy in retail stores, compared to 86 percent in 2007.

Percentage of Internet Buyers Who Browse Online, then Buy in Stores



(Q910 M-3)

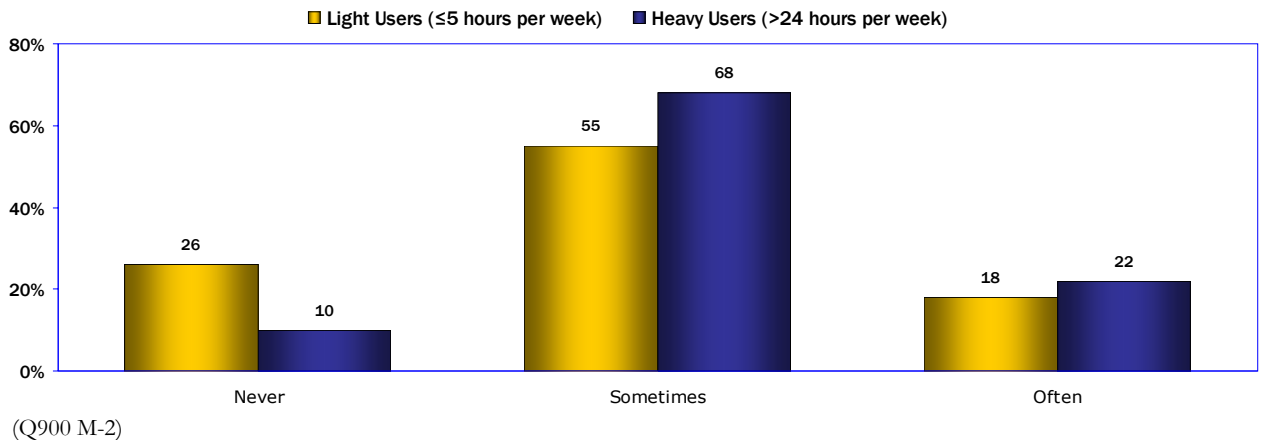
Browsing For Products: Retail Stores Vs. The Internet

Light Users vs. Heavy Users

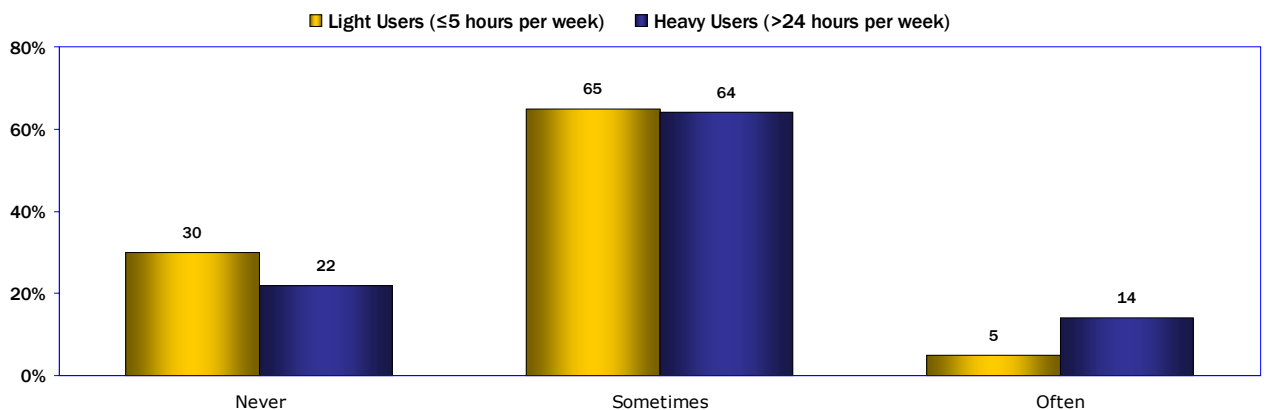
Much larger percentages of both light users and heavy users said they often browse in stores and then buy online (18 and 22 percent) than browse online and then buy in stores (5 and 14 percent).

Also, of particular note is the difference between the percentage of heavy users who never browse in stores and buy online (10 percent), and the percentage who never browse online and then buy in stores (22 percent).

**Internet Buyers Who Browse in Stores, then Buy Online
(Percentage of Light Users vs. Heavy Users)**



**Internet Buyers Who Browse Online, then Buy in Stores
(Percentage of Light Users vs. Heavy Users)**

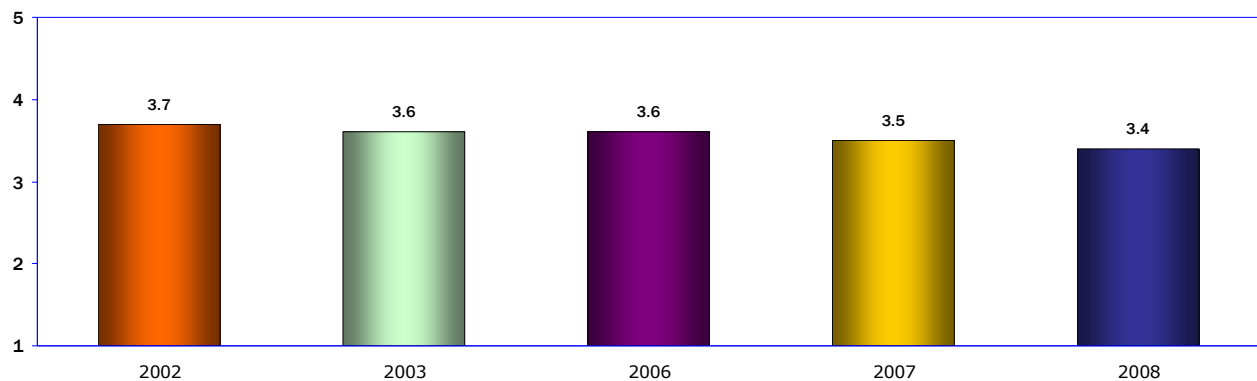


Views About Risking Privacy by Going Online

Internet users continue to agree that people who go online put their privacy at risk, however at a declining rate.

On a scale of one (strongly disagree) to five (strongly agree), users were asked to respond to the statement, “people who go online put their privacy at risk” and reported an average of 3.4 -- down slightly from 2007.

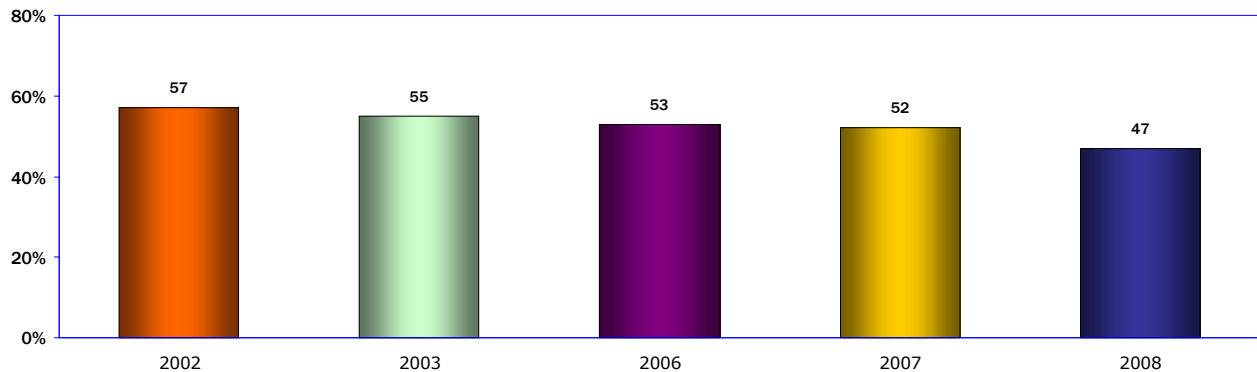
People Who Go Online Put Their Privacy at Risk
(Internet Users: 1 = Strongly Disagree, 5 = Strongly Agree)



(Q850 M-1)

The change in views seems somewhat more pronounced when looking at the percentage of users who agreed that people put their privacy at risk when going online. In the current Digital Future study, 47 percent of users agreed with this statement -- the lowest level in the Digital Future Project and the first time the percentage has dropped below half of users.

People Who Go Online Put Their Privacy at Risk
(Percentage of Internet Users Who Agree or Strongly Agree)

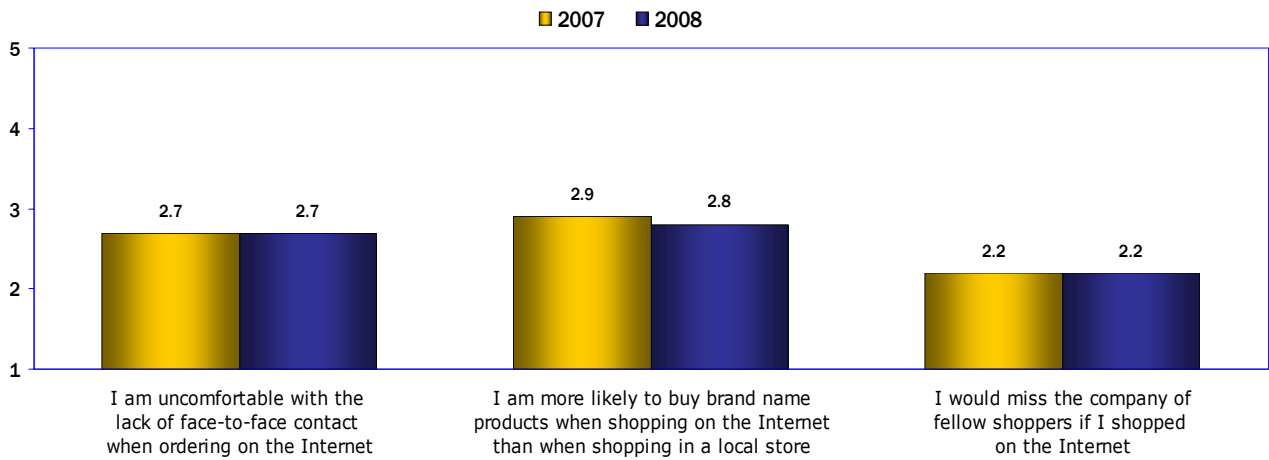


(Q850 M-2)

Views about Buying Online and in Local Stores

The level of agreement among Internet users about three key questions regarding buying online -- comfort with lack of face-to-face contact when buying online, the likelihood of buying brand-name products when shopping online, and missing the company of fellow shoppers when buying online -- remained generally the same in 2008 compared to 2007.

Views about Buying Online and in Local Stores
(Internet Users: 1 = Strongly Disagree, 5 = Strongly Agree)



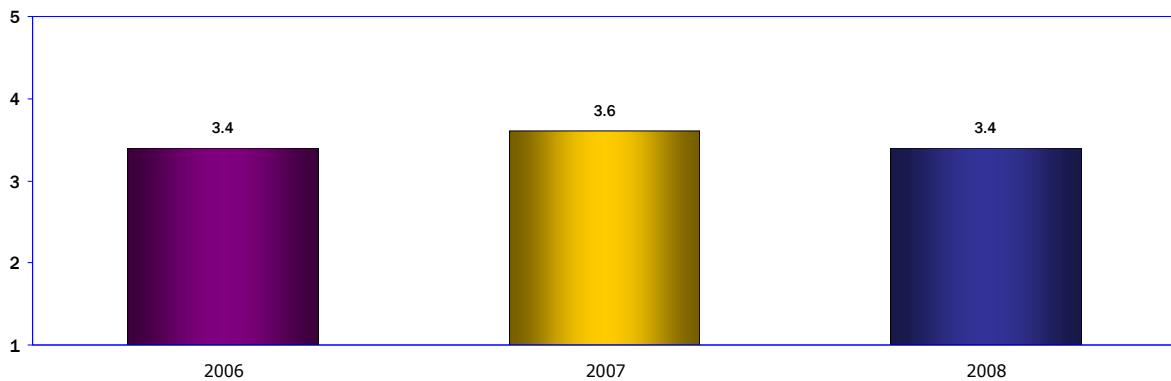
(Q850 M-3)

Views about Shopping Online (Product Quality)

Even after 15 years of Internet access in the United States, an issue about online buying that lingers for some consumers is the perceived difficulty of assessing product quality or accuracy of product descriptions when shopping online. When asked about the statement, “it’s difficult to assess product quality or accuracy of product descriptions when shopping on the Internet,” users responded with an average of 3.4 on the scale of 1 to 5, dropping slightly from the peak level of 3.6 in the 2007 study.

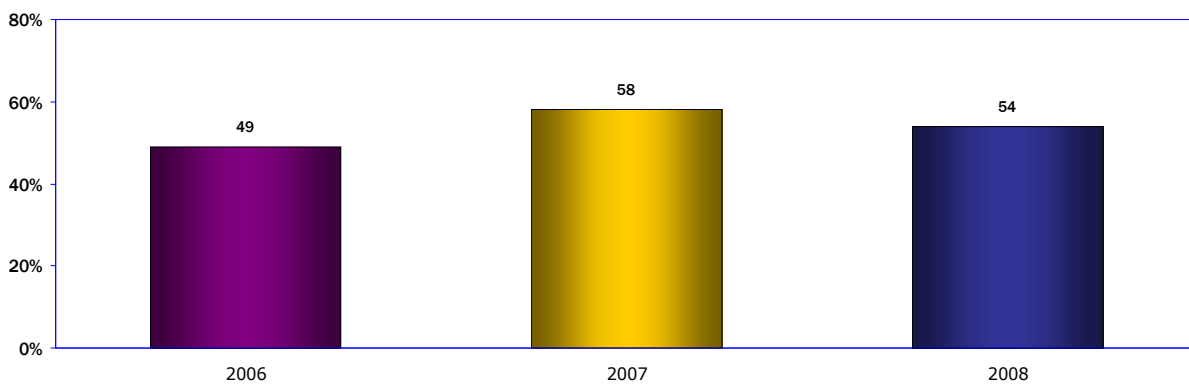
The percentage of users who agreed or strongly agreed with this statement also declined to 54 percent in the current study, down from the peak of 58 percent in 2007.

**It is Difficult to Assess Product Quality or Accuracy of Product Descriptions
when Shopping on the Internet**
(Internet Users: 1 = Strongly Disagree, 5 = Strongly Agree)



(Q850 M-5)

**It is Difficult to Assess Product Quality or Accuracy of Product Descriptions
when Shopping on the Internet**
(Internet Users: Percentage Who Agree or Strongly Agree)



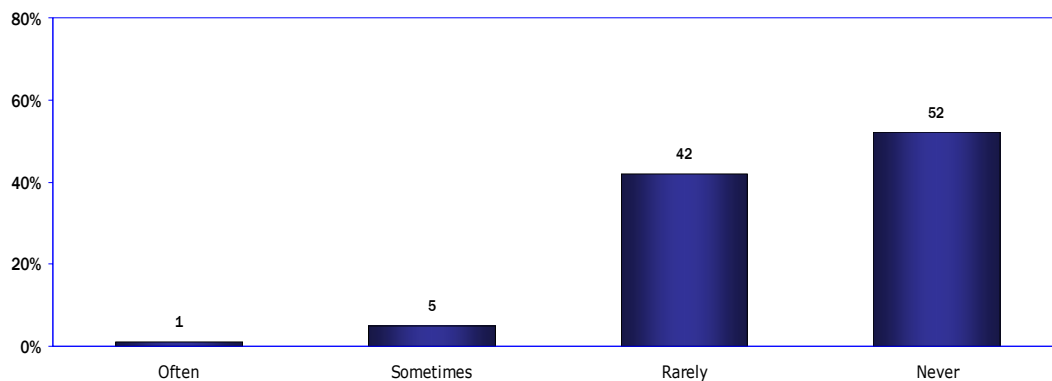
(Q850 M-6)

Do You Click on Web Advertisements?

In a series of new questions in the current Digital Future Project, Internet users express strong negative views about advertising online -- both through their limited use of it and in their opinions about it.

More than half of Internet users (52 percent) said they never click on Web advertisements, and only six percent do so sometimes or often.

How Often Do You Click on the Web Advertisements when You Go Online?
(Percentage of Internet Users)

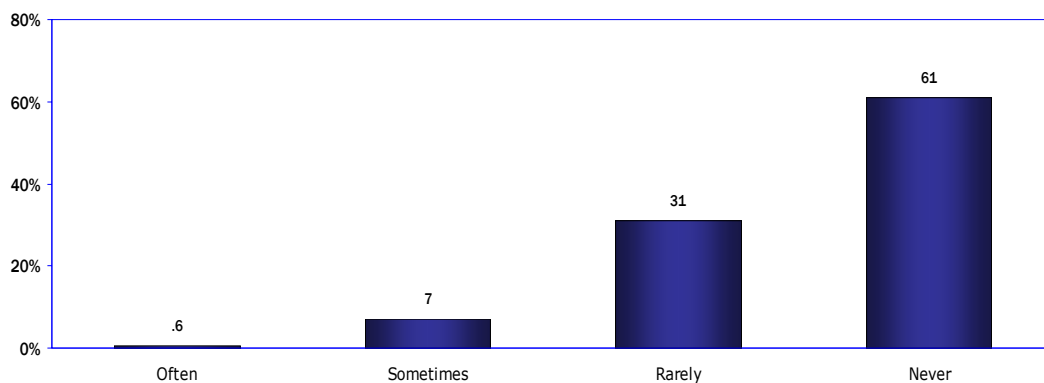


(Q815 J-1)

Web Advertisement and Purchase Decisions

Users are even less enthusiastic about purchasing decisions based on Web advertisements. In another new question for the Digital Future Project, 61 percent of Internet users said they never buy products that they learned about from a Web advertisement.

How Often Do You Purchase a Product or Service You Learned about from a Web Advertisement?
(Percentage of Internet Users)

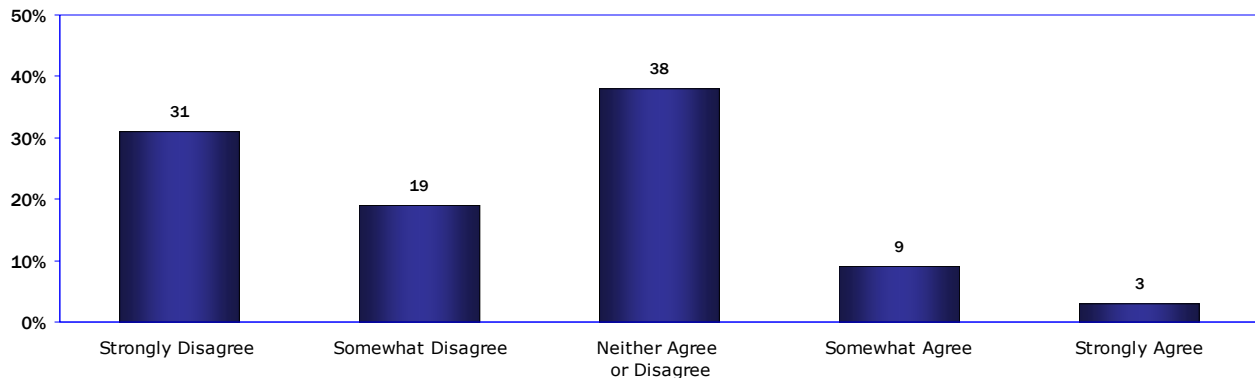


(Q816 JC-1)

Web Advertising: Information Value

Internet users consider traditional advertising more informative than Web advertising; when asked about the statement, “I find Web advertising to be more informative than traditional advertising,” only 12 percent agreed with that statement.

**In General, I Find Web Advertising to be More Informative than Traditional Advertising
(Percentage of Internet Users)**

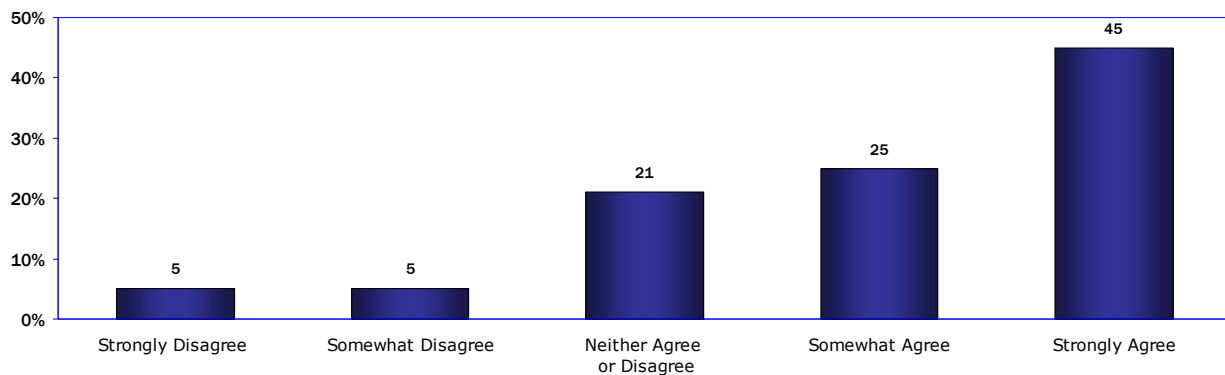


(Q817 J-1)

Do You Find Web Advertising Annoying?

Summing up views about online advertising in another new question, 70 percent of users agreed or strongly agreed with the statement, “I find Web advertising annoying.”

**In General, I Find Web Advertising Annoying
(Percentage of Internet Users)**



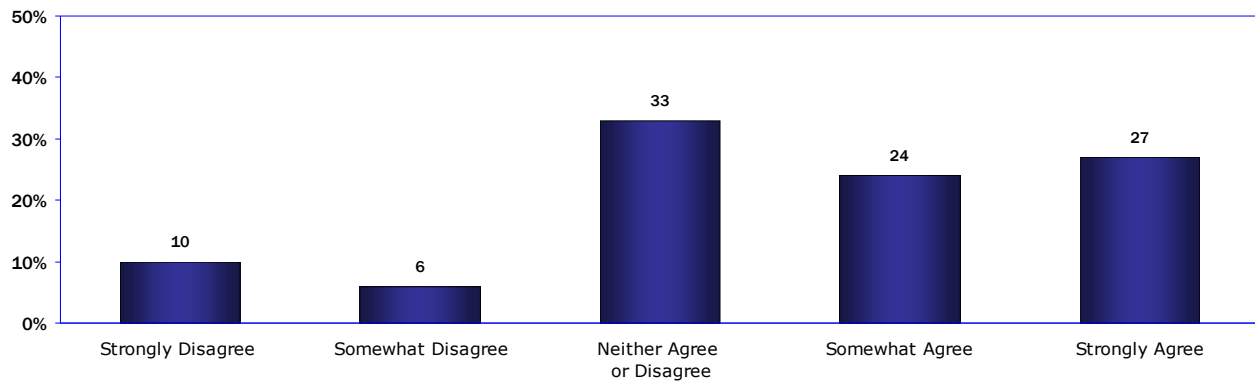
(Q817b J-2)

Online Advertising vs. Paying for Internet Content

Although Internet users express strong negative views about advertising online, they prefer Web ads to support Internet pages rather than personally paying for content.

In another new question for the Digital Future Project, fifty-one percent of users agreed or strongly agreed that they prefer having free access to online content that has advertising accompanying it (similar to television shows on commercial broadcasts) rather than having to pay for the content.

**I Prefer Having Free Access to Online Content that has Advertising Accompanying it
Rather than Having to Pay for the Content
(Percentage of Internet Users)**



(Q817c J-3)

Communication Patterns

Internet users with e-mail **97%**

Users who said the Internet is important or very important to maintaining social relationships **52%**

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

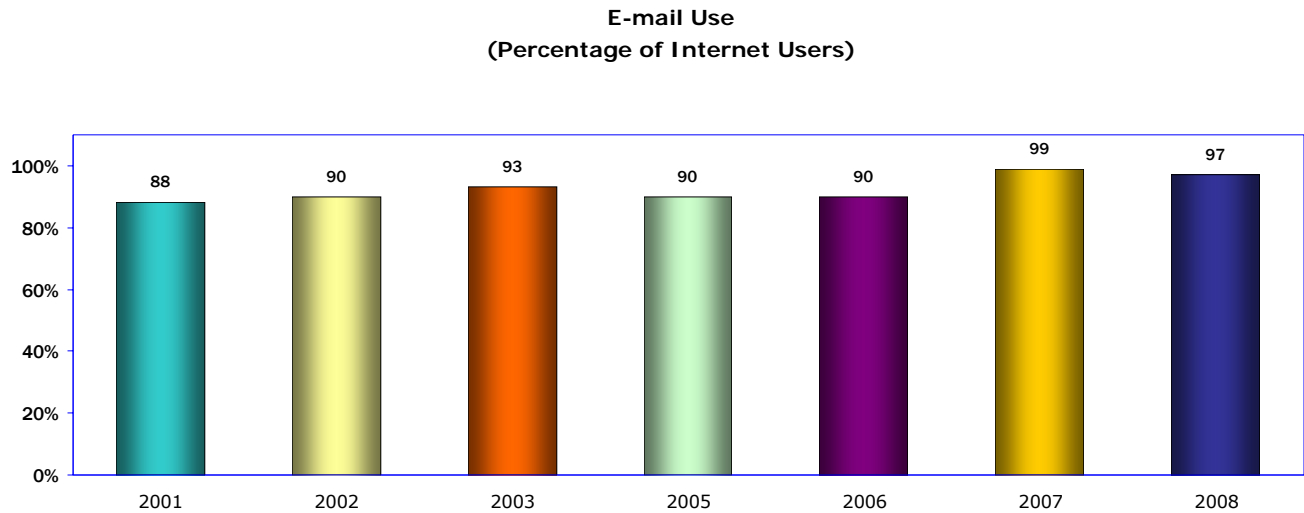
Average number of friends met online but not met in person **3.2**

Average number of friends met in person whom they originally met online **2.1**

Internet users who reported being phishing victims **12%**

How Many Americans Are Using E-mail?

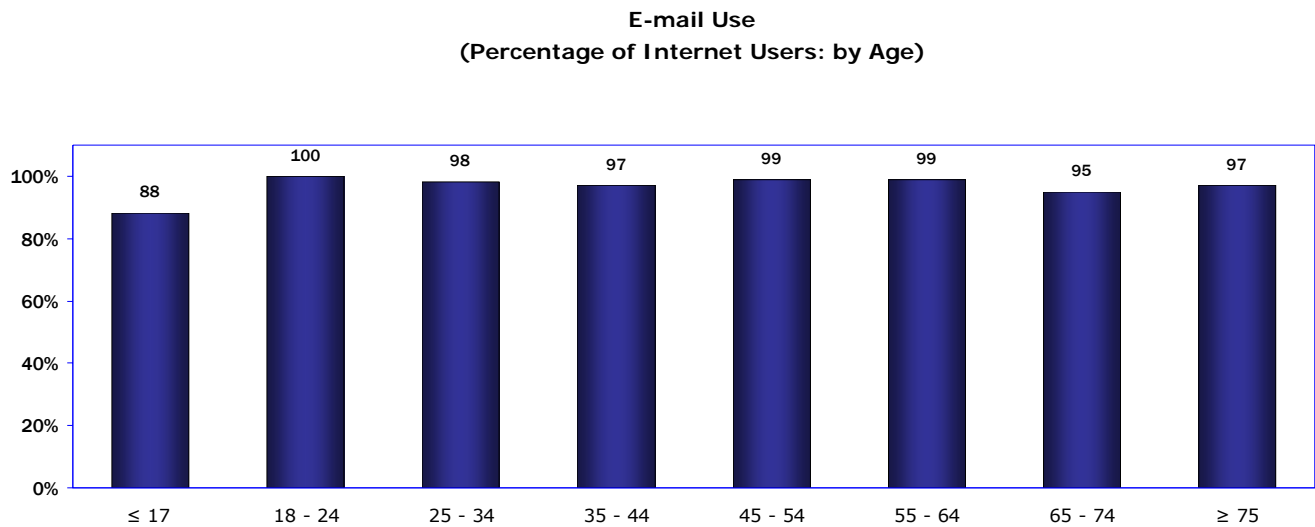
Almost everyone who goes online uses e-mail (97 percent of all Internet users).



(Q220 JC-1)

E-mail Users: By Age

With such a large percentage of Internet users who are also e-mail users, nearly all users in all age ranges use e-mail. The only modest gap is among those under 17 (possibly because of increased use of cell phone text messaging).



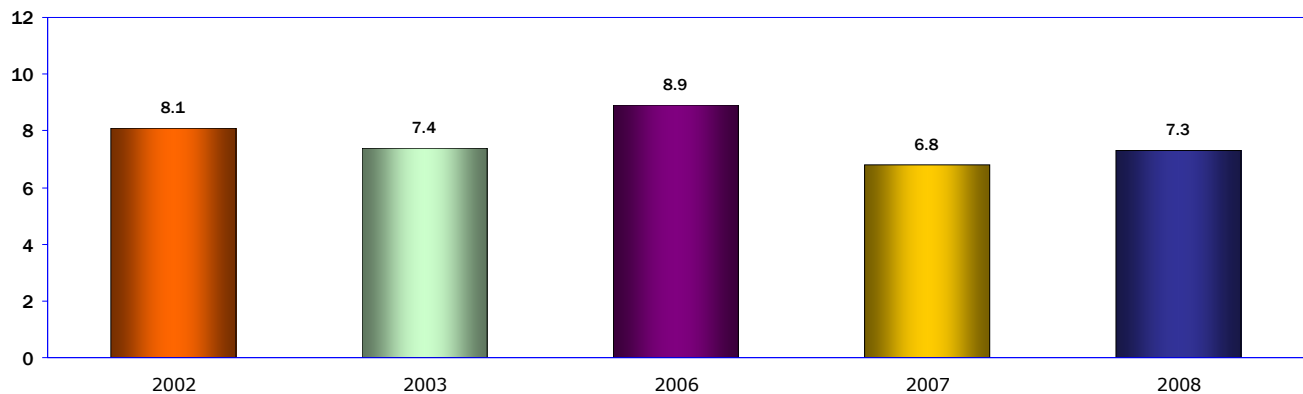
(Q220 JC-2)

Regular contact by e-mail

E-mail users maintain weekly personal e-mail contact with an average of seven people in the current study, down from the peak of nine in 2006.

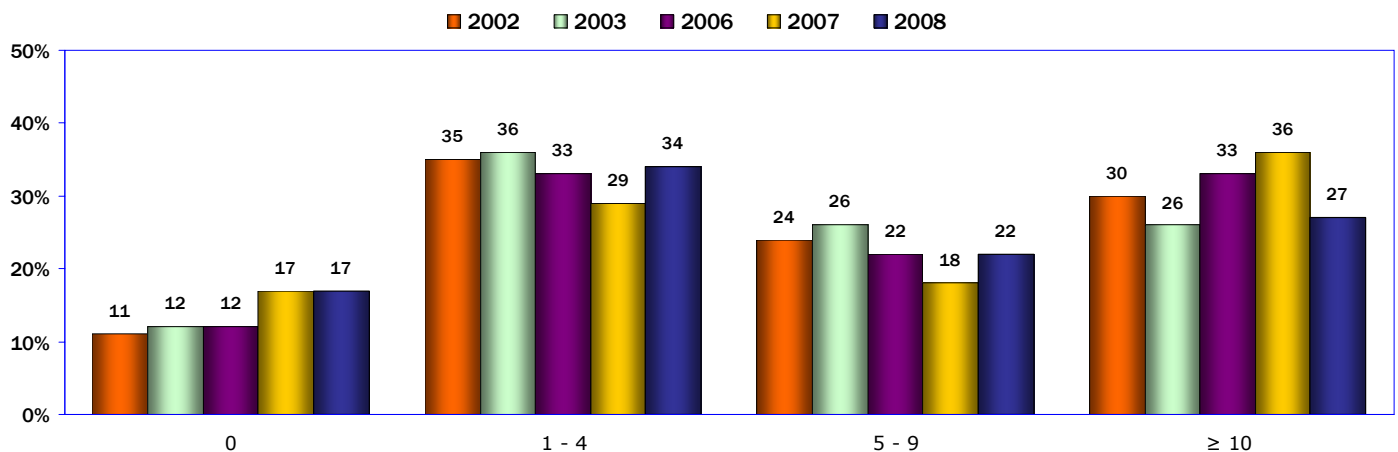
Forty-nine percent of e-mail users said they maintain personal contact by e-mail on a weekly basis with five or more people (see the lower chart), down from 54 percent in 2007 and 55 percent in 2006.

**How Many People do You Maintain
Regular Personal E-Mail Contact with on a Weekly Basis?
(Percentage of E-mail users)**



(Q290 M-3)

**Regular Personal E-Mail Contact with on a Weekly Basis?
(Percentage of E-mail users)**

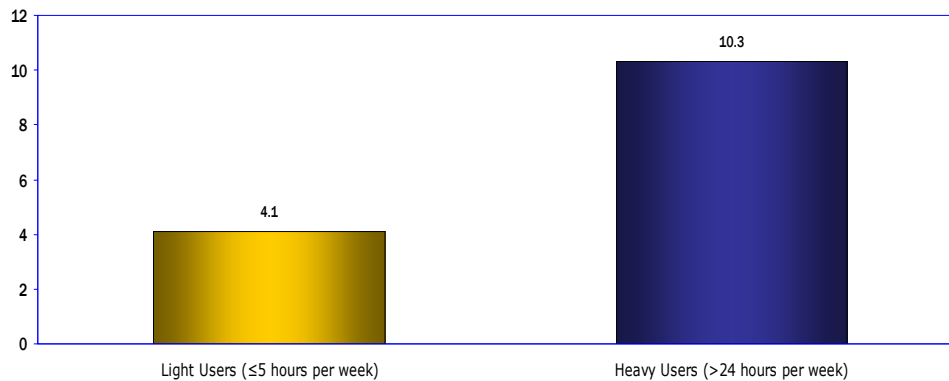


(Q290 M-5)

Regular Contact by E-mail: Light Users vs. Heavy Users

Compared to light users, heavy Internet users reported more than twice as many people with whom they stay in personal e-mail contact on a weekly basis.

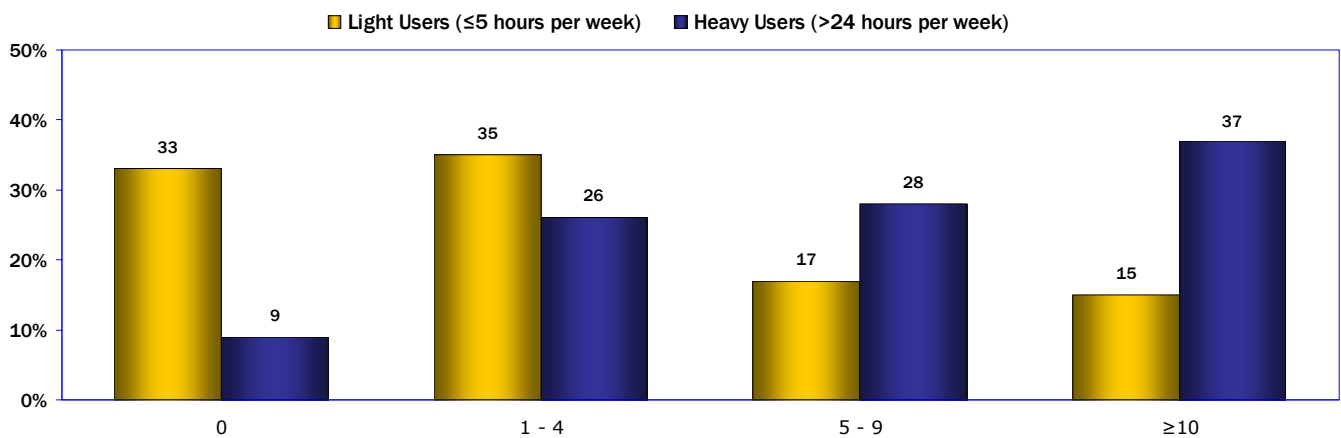
**Regular Personal E-Mail Contact with on a Weekly Basis?
(Percentage of E-mail Users: Light Users vs. Heavy Users)**



(Q290 M-4)

Sixty-five percent of heavy users reported that they maintain weekly personal contact with five or more people by e-mail, compared to 32 percent of light users.

**Regular Personal E-Mail Contact with on a Weekly Basis?
(Percentage of E-mail Users: Light Users vs. Heavy Users)**



(Q290 M-2)

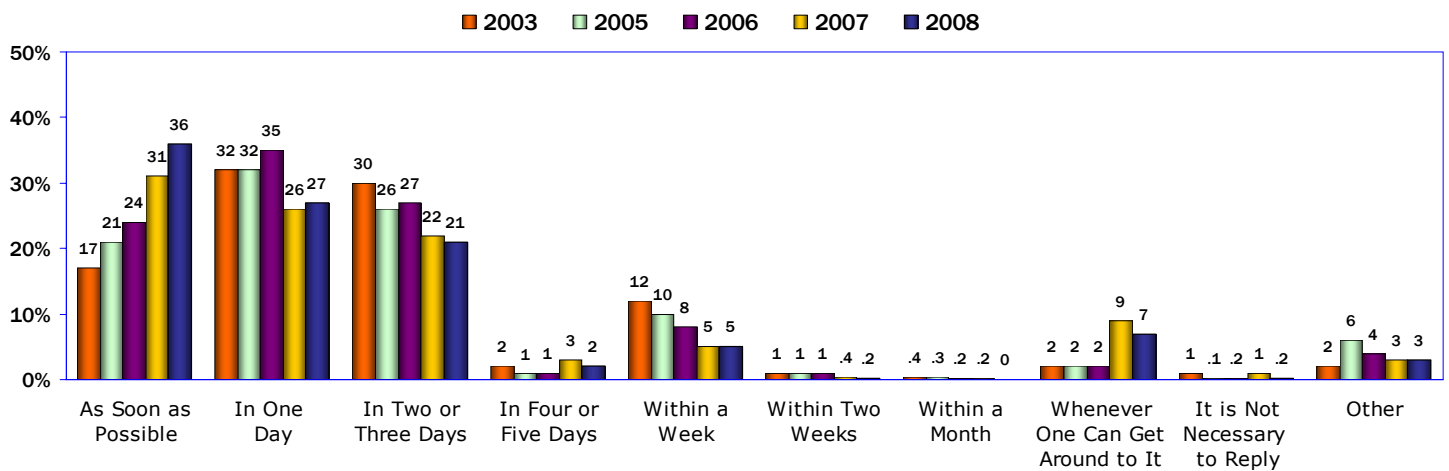
How Quickly Should Users Reply To E-mail?

A growing percentage of e-mail users said they expect a quick response to their online communications.

Thirty-six percent of e-mail users said they expect a response “as soon as possible” -- the highest percentage who gave this response to date. Sixty-three percent said they expect a response in one day or as soon as possible -- also a high level for the studies.

Notably, the percentage who said e-mail should receive a response in some longer period of time (in two or three days, in four or five days, or within a week) dropped to 28 percent of users -- a new low for the Digital Future studies.

How Quickly Should Users Reply to an E-mail Message?
(Percentage of E-mail Users)



(Q263 M-3)

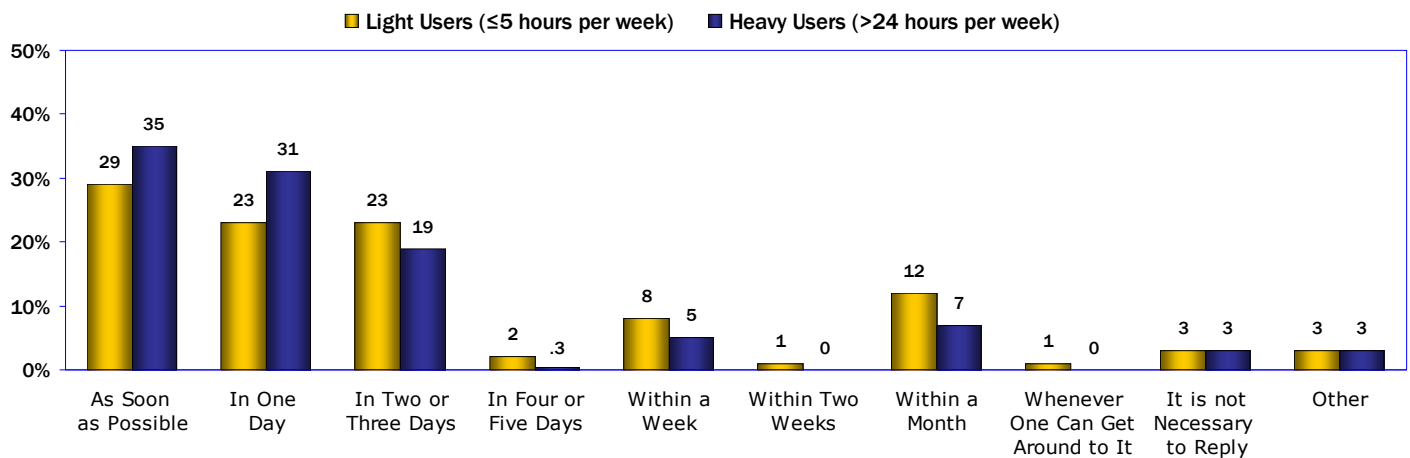
How Quickly Should Users Reply To E-mail? Light Users Vs. Heavy Users

Both heavy Internet users and light users are eager to receive a fast response.

Sixty-six percent of heavy users said e-mail should receive a reply in one day or as soon as possible, compared to 52 percent of light users.

However, significant percentages of both light users and heavy users do not feel that e-mail requires such a rapid response, with 50 percent of light users and 35 percent of heavy users saying that an e-mail reply can be sent in two days or more, or “whenever one can get around to it.”

How Quickly Should Users Reply to an E-mail Message?
(Percentage of E-mail Users: Light Users Vs. Heavy Users)



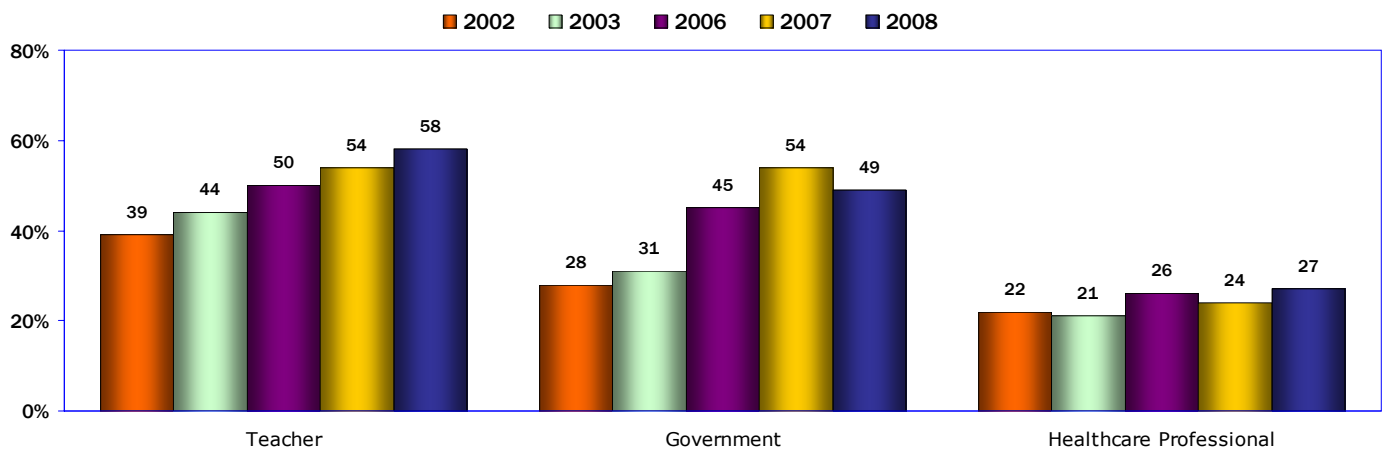
(Q263 M-2)

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

A steadily increasing percentage of e-mail users have said that they had e-mail contact with teachers.

Almost half of e-mail users (49 percent) in the current Digital Future study said they have contacted a government official by e-mail -- down marginally from 2007. The percentage who reported contacting a health care provider by e-mail, although much lower than those who contact a teacher or government official, has also reached its highest level in the Digital Future studies.

**E-Mail Contact with Teachers, Government Officials, or Health Care Providers
(Percentage of E-mail Users)**

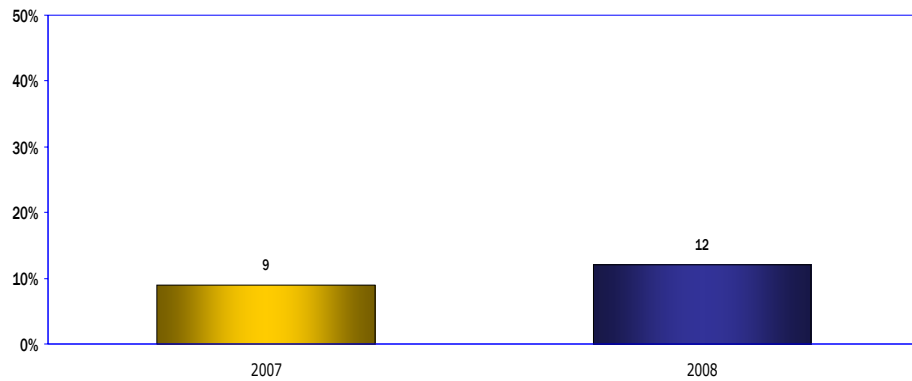


(Q267 M-3)

Phishing Victims

A slightly higher percentage of e-mail users in the current study compared to 2007 said they had been victims of phishing (being scammed into surrendering private information to an identity thief).

Victims of Phishing
(Percentage of E-mail Users)



(Q534B M-2)

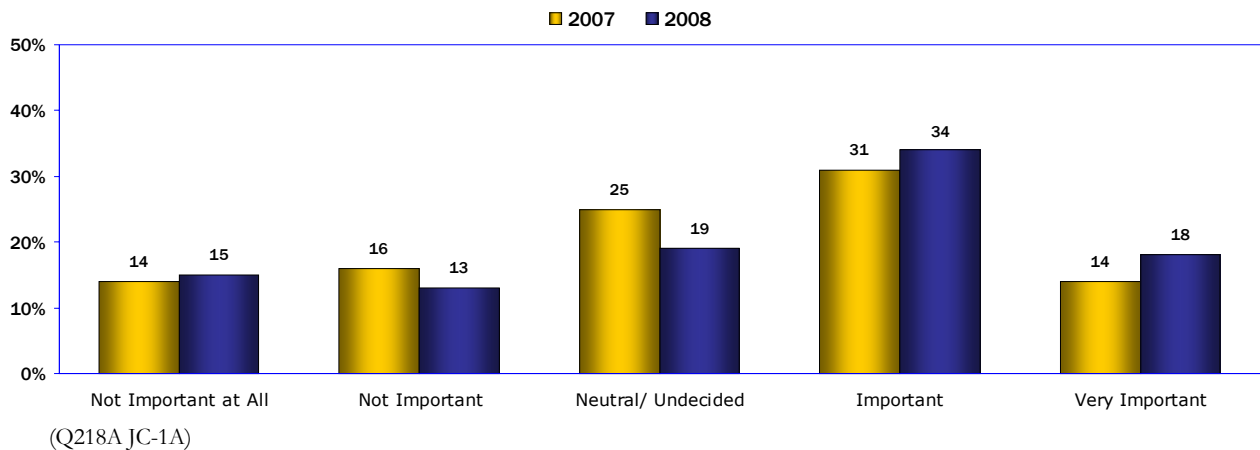
The Internet And Social Relationships

A growing percentage of Internet users said the Internet is important in helping to maintain social relationships.

Fifty-two percent of users said the Internet was important or very important in helping them maintain their social relationships -- up from 45 percent in 2007.

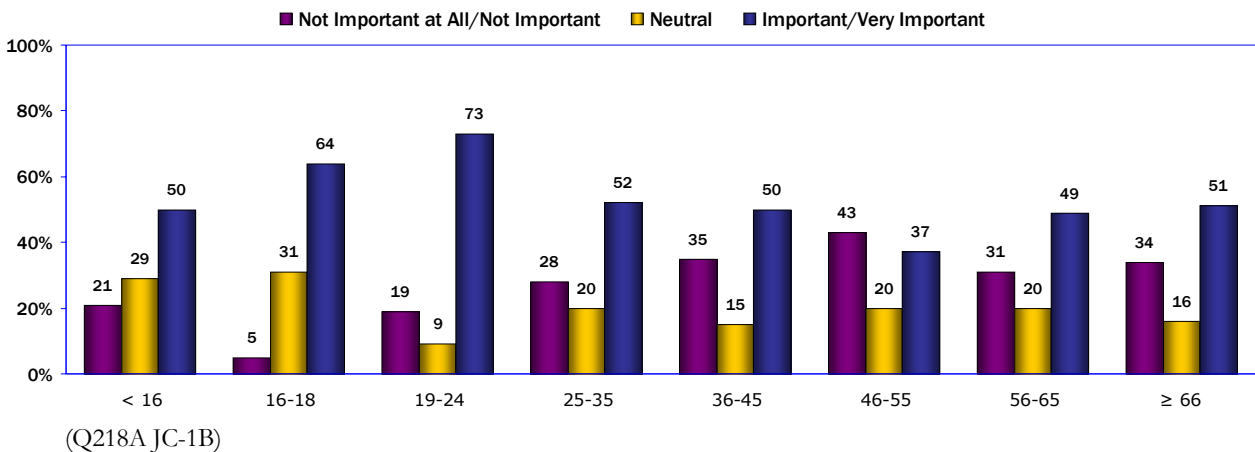
Twenty-eight percent of users said the Internet has no importance in maintaining their social relationships -- down from 30 percent in 2007.

**How Important is the Internet for Helping You Maintain Social Relationships
(Percentage of Internet Users)**



When this question is explored by age, findings show that the percentage of those who consider the Internet important or very important for maintaining social relationships is highest among users under 24. Half or more of users in all age groups except those 46 to 65 said the Internet is important or very important for maintaining social relationships.

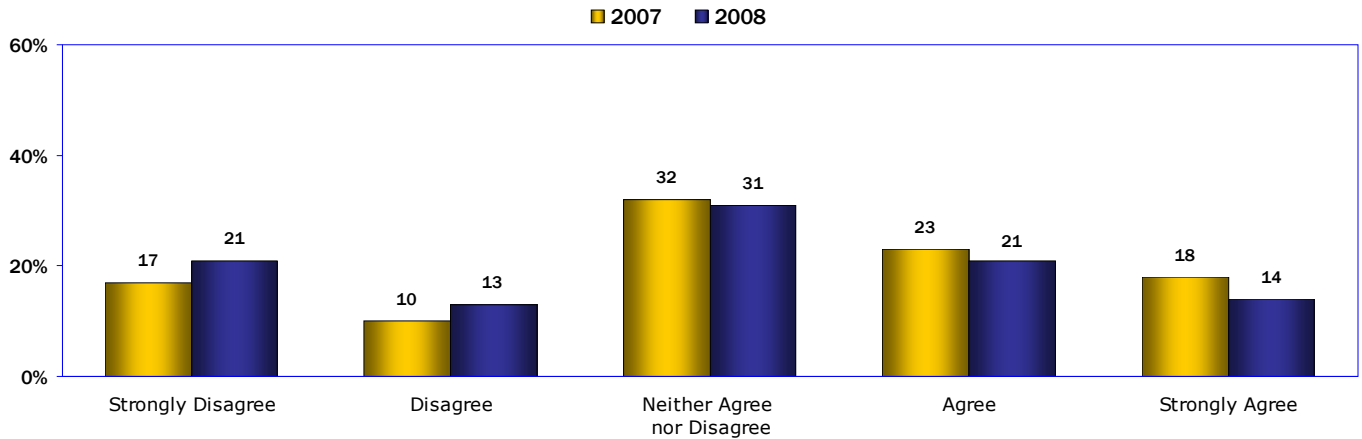
**How Important is the Internet for Helping You Maintain Social Relationships
(Percentage of Internet Users)**



Does The Internet Help Users Improve Their Relationships?

A smaller percentage of Internet users said being online has helped improve relationships with important people in their lives -- 35 percent of users in the current study agreed with this statement, compared with 41 percent in 2007.

**Being Online Has Helped Me Improve My Relationships With Important People In My Life
(Percentage of Internet Users)**

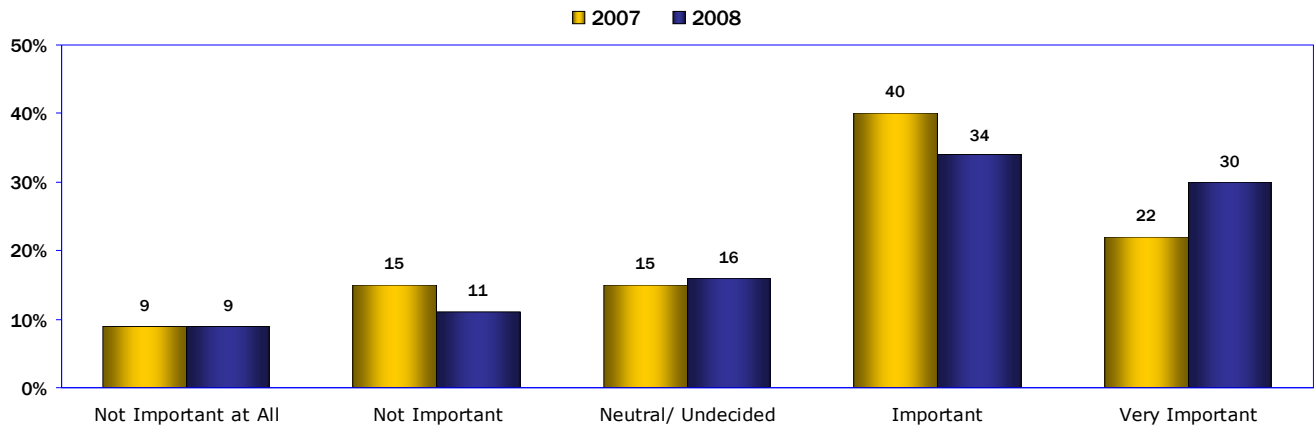


(Q533 M-3)

Cell Phones And Social Relationships

A large percentage of Internet users with cell phones said their phone helped them to maintain their social relationships. Thirty percent of Internet users in the current Digital Future study said their cell phone is very important for this reason, compared to 22 percent in 2007.

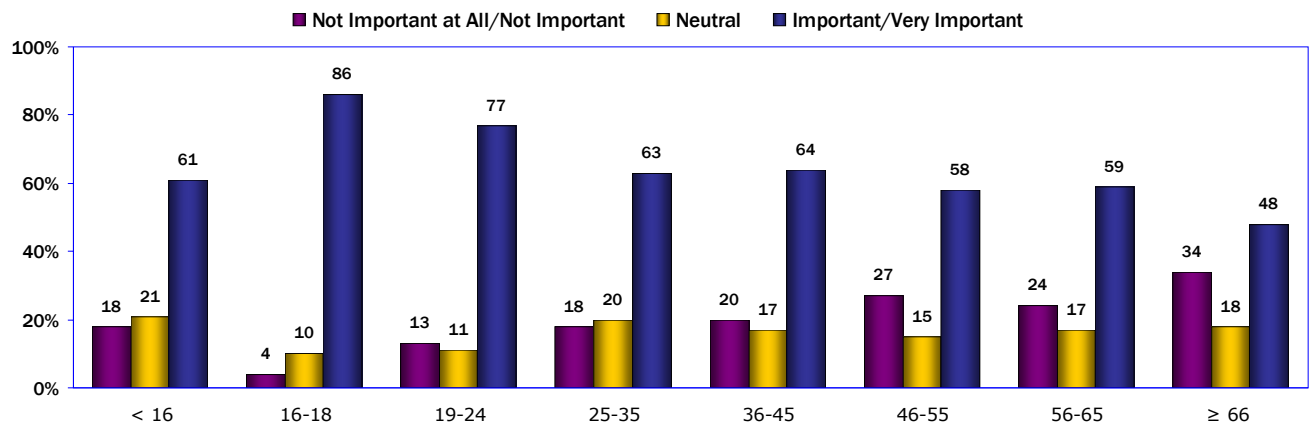
**How Important Is The Cell Phone For Helping You Maintain Social Relationships?
(Percentage of Internet Users)**



(Q218B JC-2A)

More than half of Internet users in all age ranges except age 66 or older reported that the cell phone is important or very important in maintaining social relationships.

**How Important is the Cell Phone for Helping You Maintain Social Relationships?
(Percentage of Internet Users by Age)**



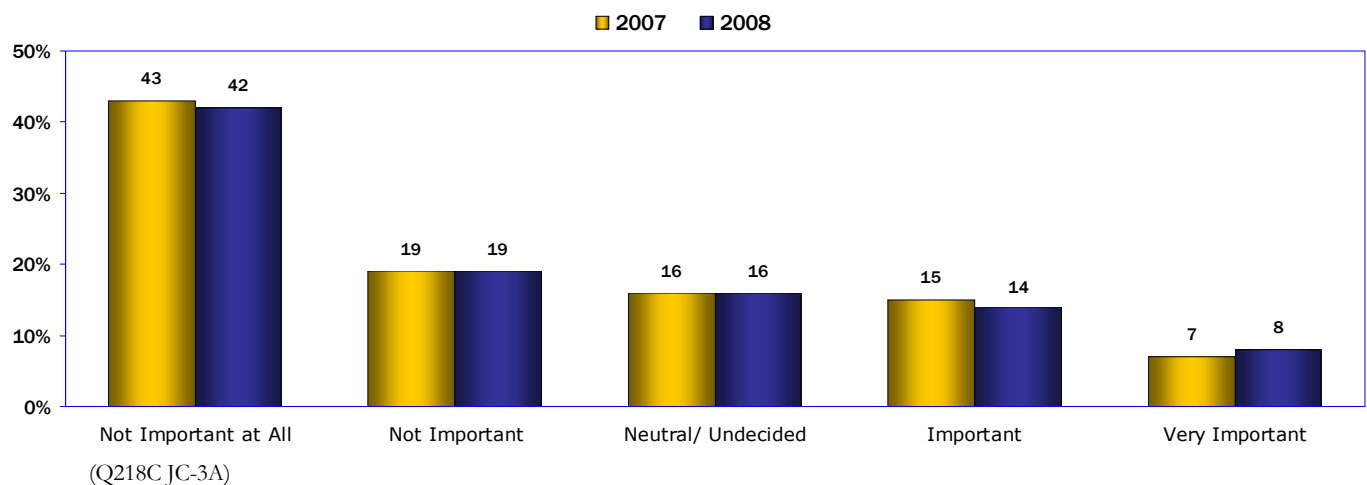
(Q218B JC-1B)

Instant Messaging And Social Relationships

Although instant messaging continues to be one of the most popular forms of communication within some age groups, overall a relatively small percentage of Internet users said that instant messaging is important in maintaining social relationships.

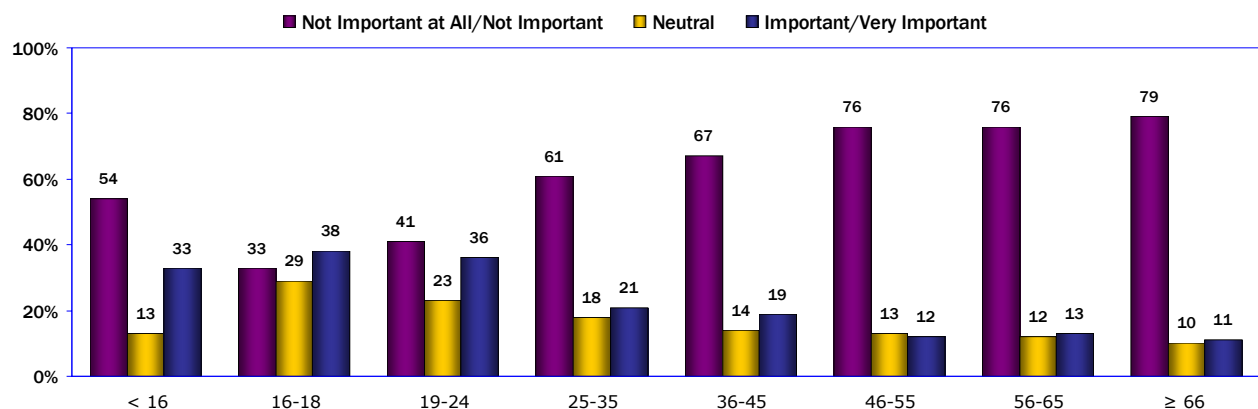
Among all Internet users, 22 percent said that instant messaging is important or very important for maintaining social relationships -- the same as in 2007. By comparison, 61 percent of users said instant messaging is not important -- also the same as in 2007.

**How Important is Instant Messaging for Helping You Maintain Social Relationships?
(Percentage of Internet Users)**



The percentages of Internet users with positive views about instant messaging are low across all age groups. Sixty percent or more of all Internet users age 25 or older said that IM is not important for maintaining social relationships.

**How Important Is Instant Messaging For Helping You Maintain Social Relationships?
(Internet Users)**



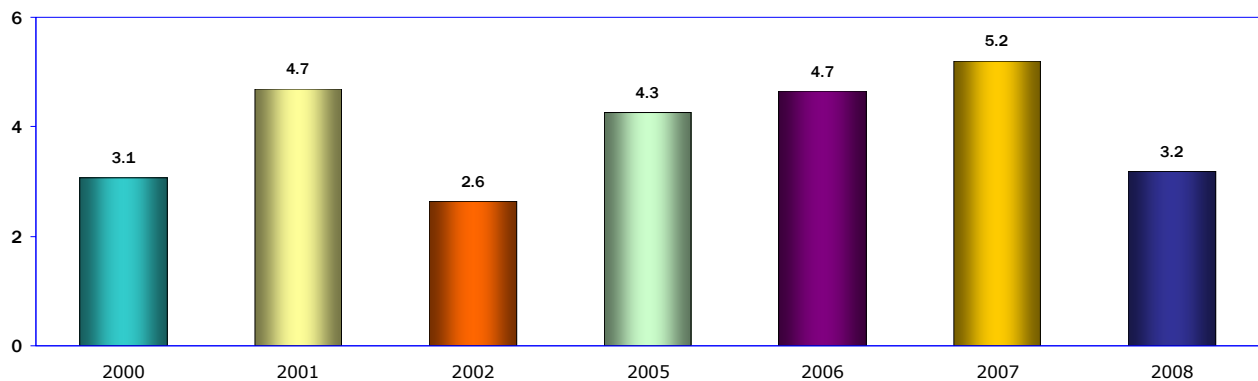
(Q218C JC-3B)

The Internet And Online Friends

Internet users reported a declining number of online friends.

In the current Digital Future study, Internet users said they have an average of 3.2 friends online whom they have never met in person, a large decline over the peak number reported in 2007.

**Online Friends Never Met in Person
(Percentage of Internet Users)**



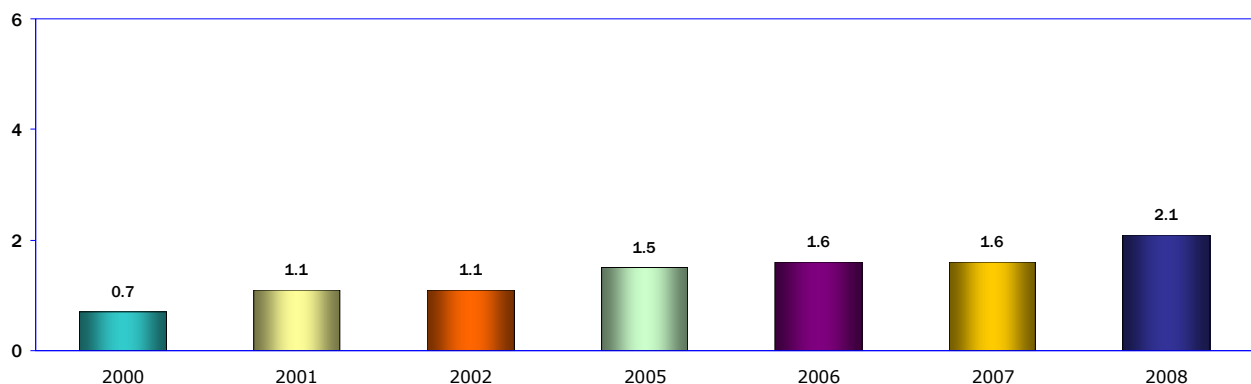
(Q330 JC-1)

Friends Met Online, Then Met In Person

While the number of online friends may be declining, the number of friends that users meet in person after initially meeting them online is growing.

Users said they met an average of 2.1 friends in person whom they originally met online -- an increase over 2007 and a peak for the Digital Future Project.

**Online Friends Met in Person
(Percentage of Internet Users)**

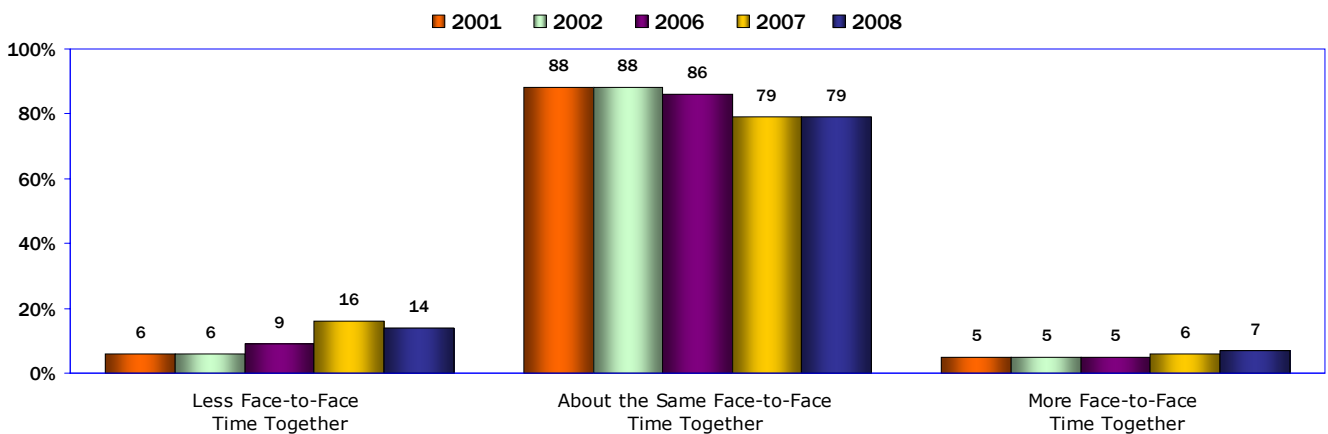


(Q320 JC-1)

Time Spent Socializing With Friends and Family

The percentage of Internet users in the current study who said that they spend about the same face-to-face time with friends since being connected to the Internet remained unchanged from 2007, after two years of declines.

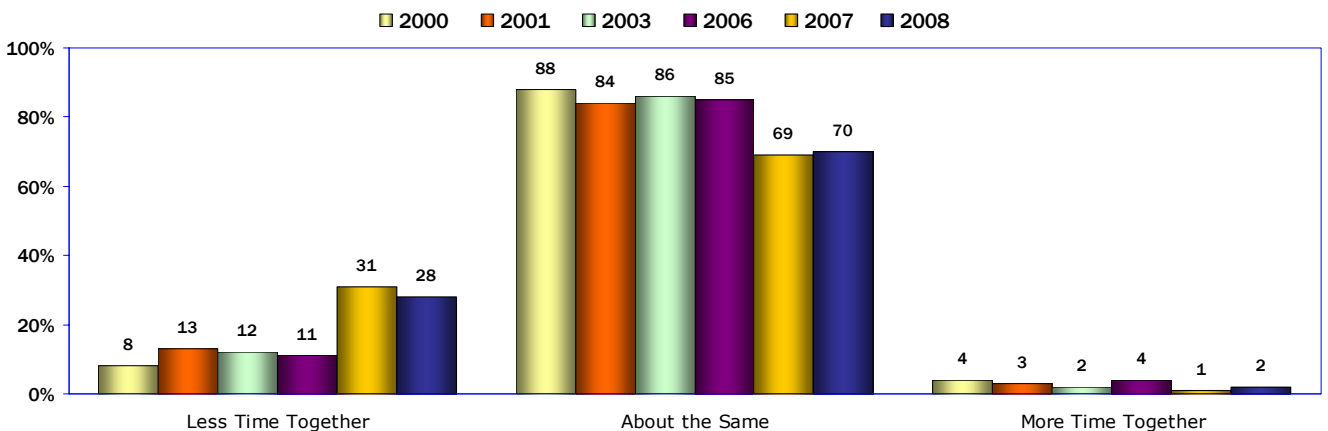
**Time Spent Face-to-Face with Friends Since Being Connected to the Internet
(Percentage of Internet Users)**



(Q1037 JC-2)

Compared to users who said they spend less time with friends since being connected to the Internet, twice as many (28 percent) said they spend less time with family since going online. However, that percentage has declined slightly after a large increase in 2007.

**Time Spent Face-To-Face with Family in the Household Since Being Connected to the Internet
(Percentage of Internet Users)**

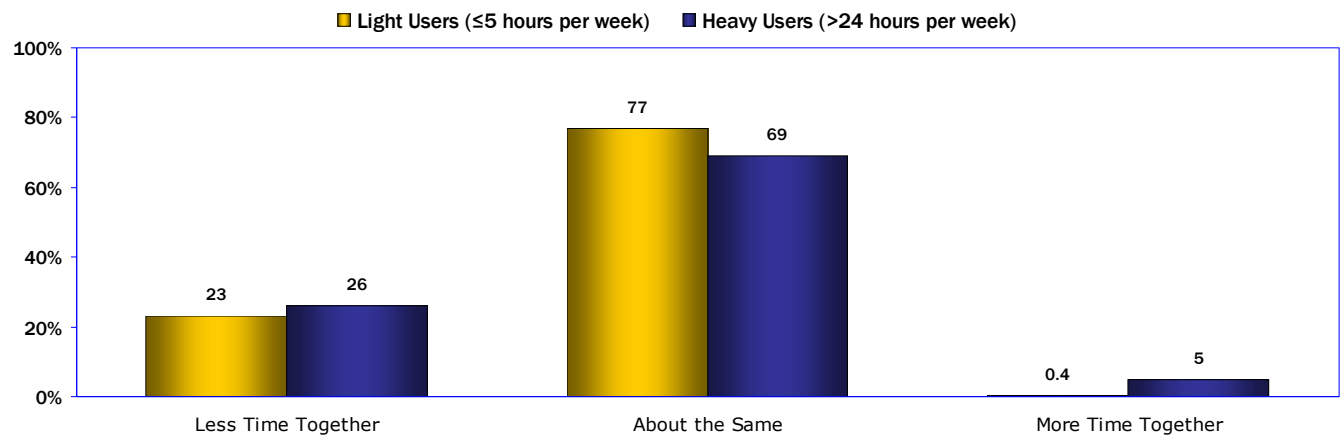


(Q1035 74A M-3)

Time Spent Socializing With Friends and Family: Light Users vs. Heavy Users

Light users and heavy users reported similar views about the effect of the Internet on time spent with family in their households. Twenty-three percent of light users and 26 percent of heavy users said they spend less face-to-face time with members of their household since being connected to the Internet.

**Time Spent Face-To-Face With Family in the Household Since Being Connected to the Internet
(Percentage of Home Internet Users: Light Users vs. Heavy Users)**

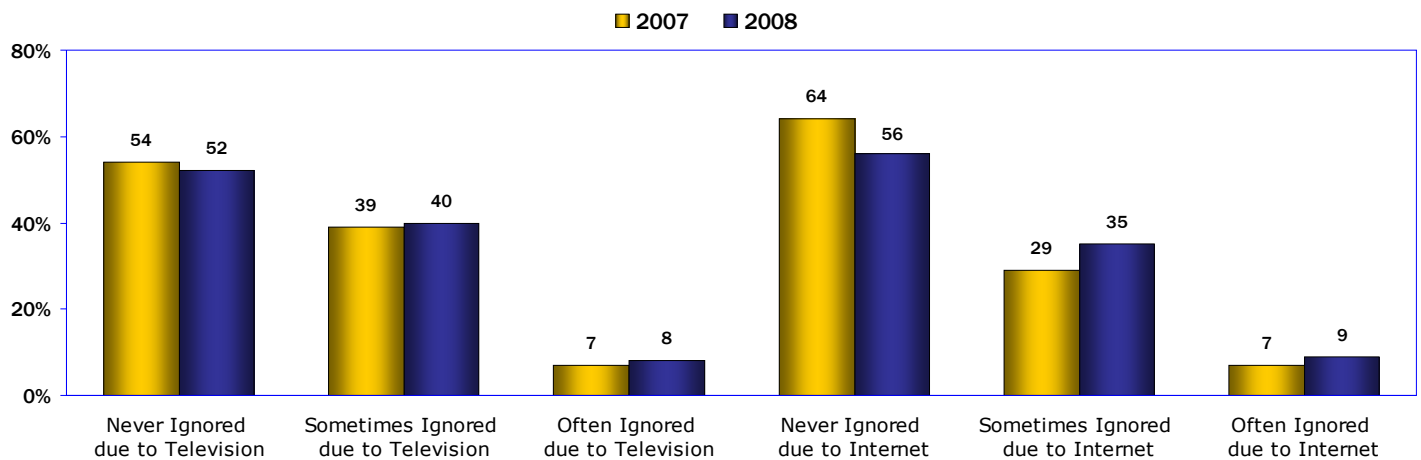


(Q1035 74A M-2)

Are You Ignored Because of Television or the Internet?

Significant percentages of Internet users said they were sometimes or often ignored because another member of the household spends too much time online (44 percent). An even higher percentage (48 percent) said they were ignored because others spend too much time watching TV.

Do You Feel that You are Ignored Because a Household Member Spends Too Much Time Watching TV?
Do You Feel that You are Ignored Because a Household Member Spends Too Much Time on the Internet?
(Percentage of Internet Users with Multiple People in the Household)



(Q1010 x Q1020)

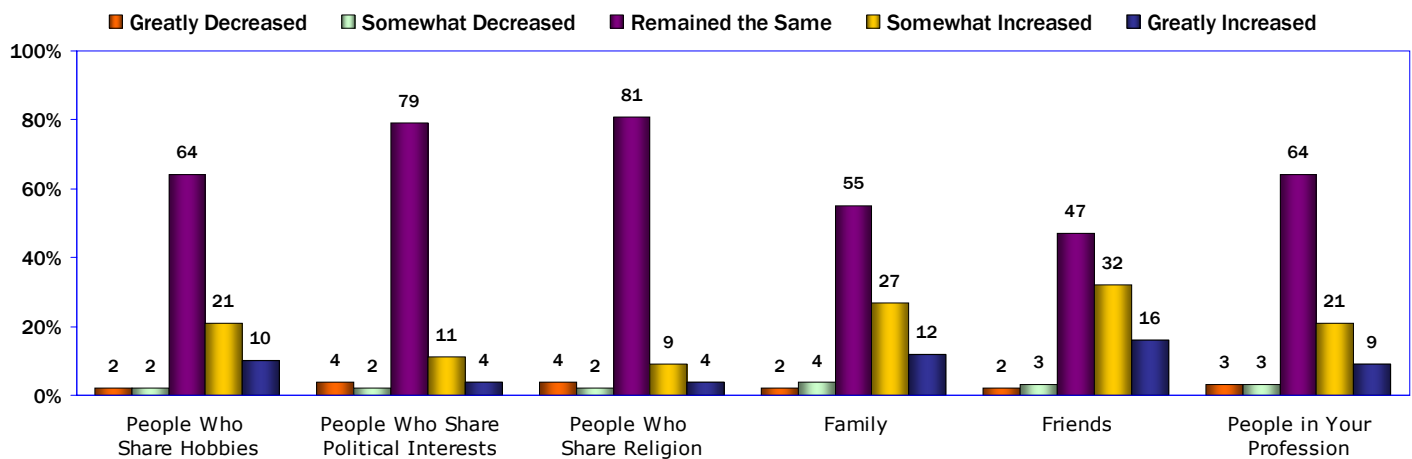
Internet Use and Contact with Others

In general, Internet use has no effect on contact with key groups in users' lives, such as family, friends, and people who share hobbies, political beliefs, religion, and professional interests.

Internet use has increased or greatly increased contact for users with their friends (48 percent), and families (39 percent), as well as people who share their hobbies (31 percent), professions (30 percent), political interests (15 percent), and religion (13 percent).

However, small percentages of users -- typically four to six percent -- said that the Internet has decreased or greatly decreased their contact with key groups in their lives.

**How Has Internet Use Affected Your Contact with the Following Groups?
(Percentage of Internet Users)**



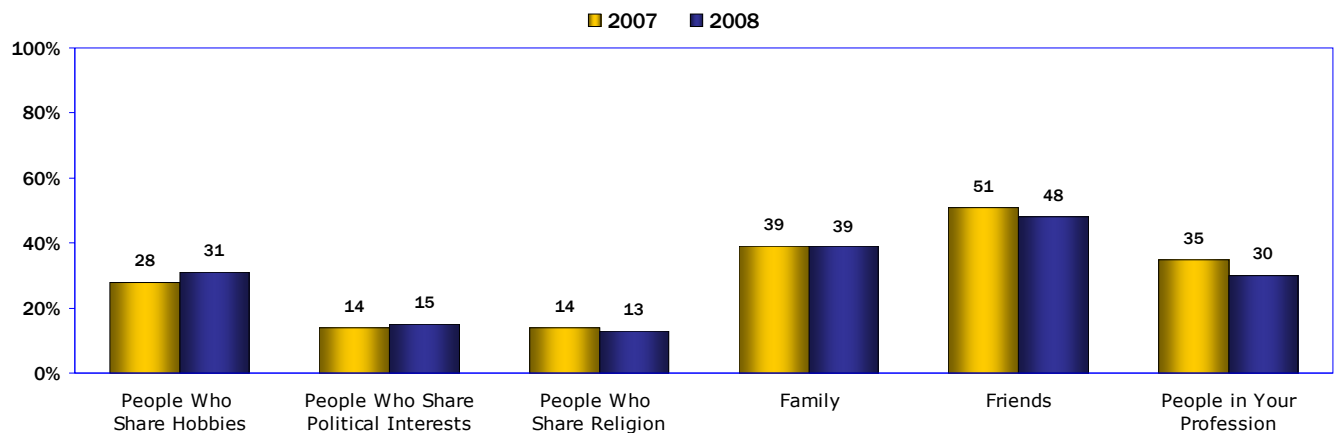
(Q950 JC-1)

Internet Use and Contact with Others: Specific Groups

Significant percentages of Internet users in the current Digital Future study said that going online has increased their contact with friends, family, people who share their hobbies, and people who share their profession.

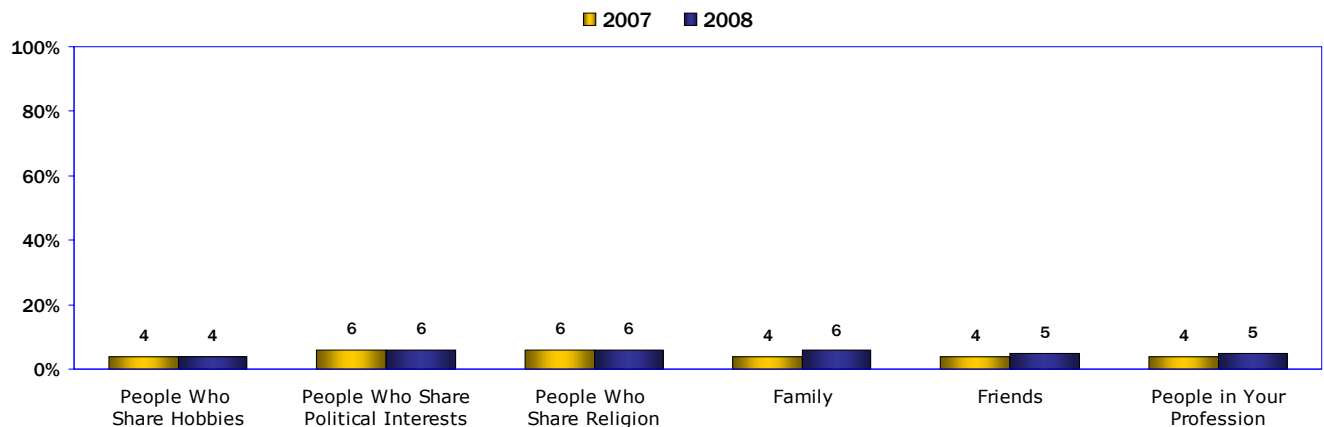
Very small percentages of users -- single-digit percentages in all cases -- said that going online has decreased their contact with others (see lower chart).

Has the Internet Increased or Decreased Your Contact with the Following Groups?
(Percentage of Internet Users Who Answered "Increased" or "Greatly Increased")



(Q950 JC-1d-e)

Has the Internet Increased or Decreased Your Contact with the Following Groups?
(Percentage of Internet Users Who Answered "Decreased" or "Greatly Decreased")



(Q950 JC-1a-b)

Social Effects: Online Communities

***Average length of membership
in an online community*** **3.2 years**

***Online community members
who log in to their community
at least once a day*** **56%**

***Online community members
who take offline actions related
to their online communities
at least monthly*** **23%**

***Online community members
who meet members of their
online community in person*** **42%**

***Online community members
who said they feel as strongly
about their communities as they
do about their real world
communities*** **42%**

Online Communities

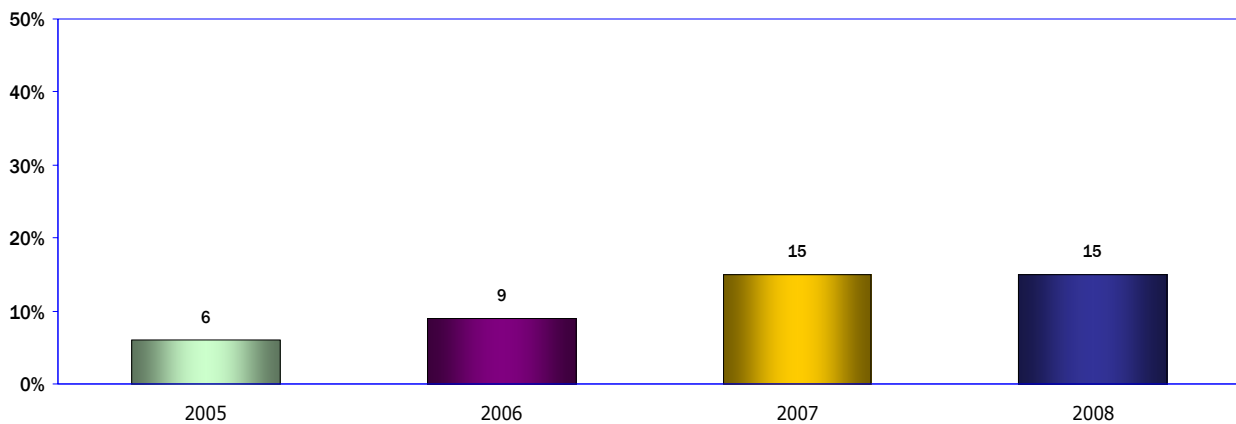
For the Digital Future Project, an “online community” is defined as a group that shares thoughts or ideas, or works on common projects, through electronic communication only.

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 -- no change over 2007, and still the peak level so far in the studies.

**Are You A Member of an Online Community?
(Percentage of Internet Users)**

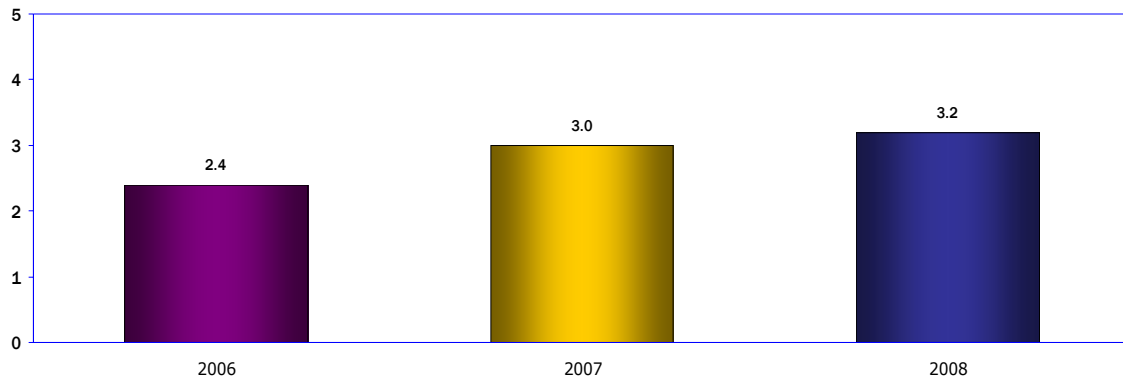


(Q1202 M-2) (Does not include social networking sites)

Membership In Online Communities: How Long?

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

How Long Have You Been a Member of Your Online Community?
(Percentage of Online Community Members)



(Q1203A M-1)

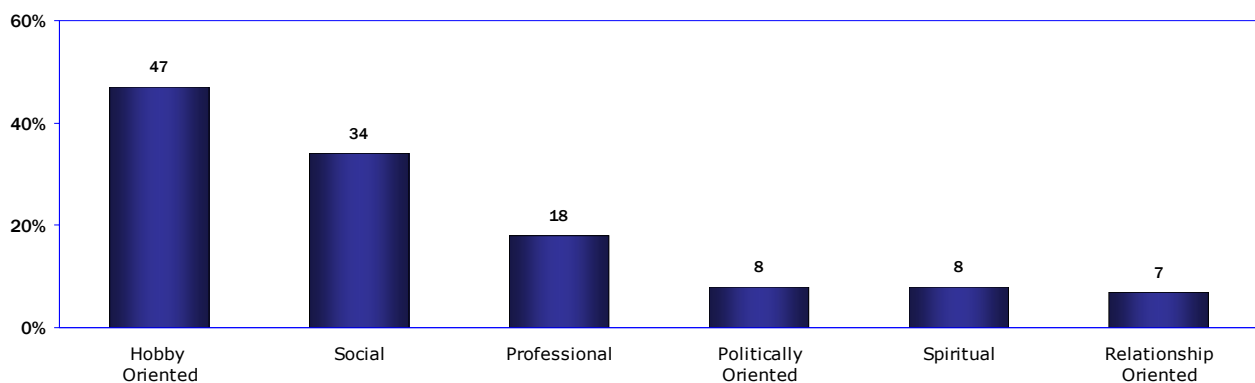
(Or, if a member of multiple communities, how long have you been a member of the single most important of those communities?)

Types of Online Communities

The largest percentage of users who said they were in an online community said their community is related to their hobbies.

The next largest percentage of members said their community involves their social lives (34 percent) or professional issues (18 percent).

What is the Nature of Your Online Community?
(Percentage of Online Community Members)

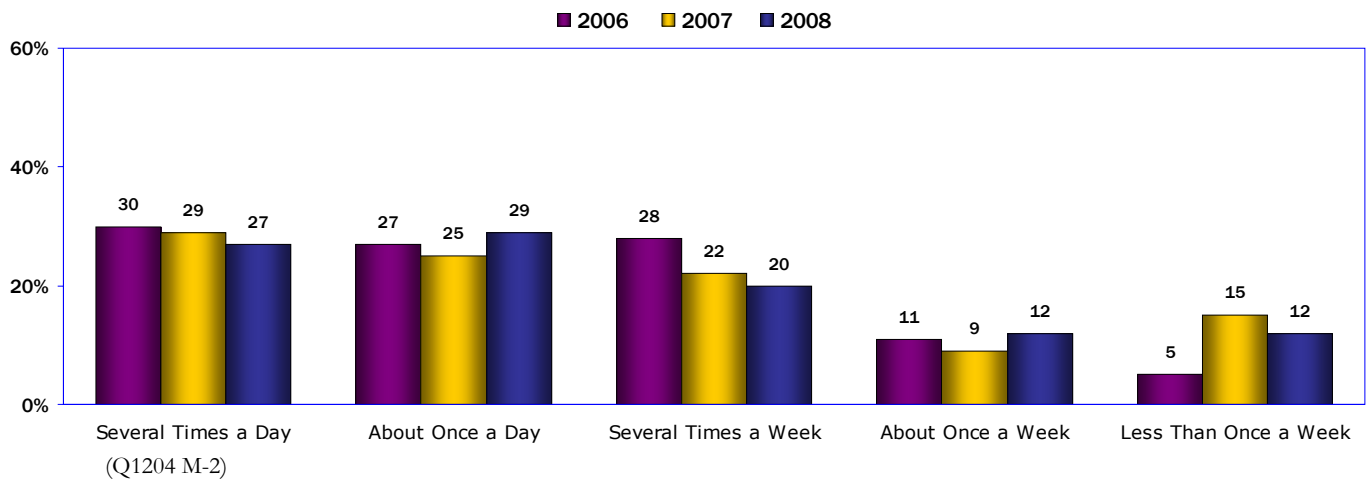


(Q1202A M-1)

Online Community Members: How Often Do They Log In?

For the second year in a row, fewer members of online communities said they log into their community several times a day. However, the percentage who log in about once a day increased to its peak level so far in the Digital Future Project (29 percent).

How Often do You Log in to Your Online Community?
(Percentage of Online Community Members)

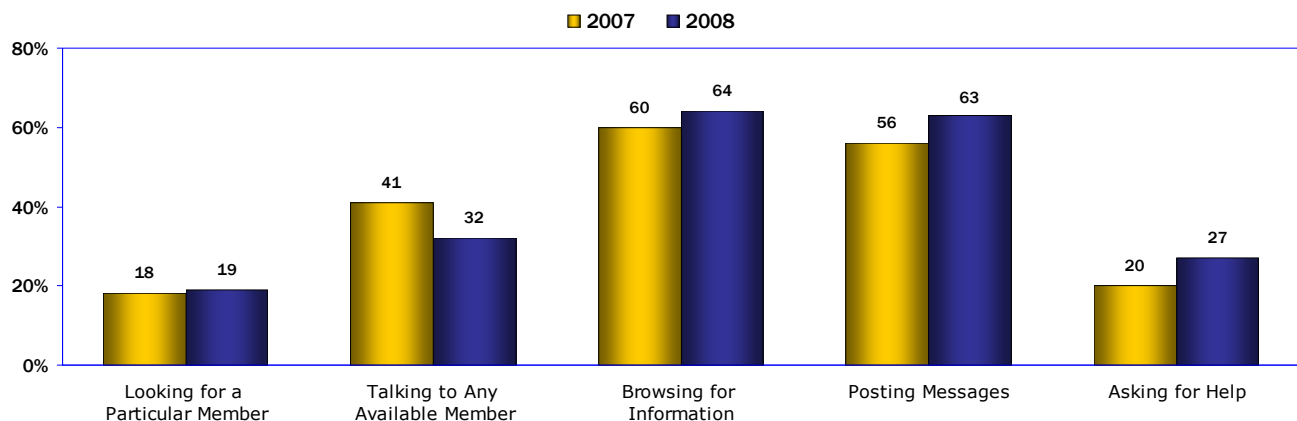


What do you do when you are logged into your online community?

Large percentages of members of online communities spend their time in those communities looking for information (64 percent) or posting messages (63 percent) -- both high figures for the years this question has been asked in the Digital Future studies.

Less than one-third (32 percent) said they go online to talk with any available member of their online community, a decline from 41 percent in 2007.

Activities in Online Communities
(Percentage of Online Communities Members)



(Q1205 M-2 Multiple responses OK; if multiple, the single most important of those communities)

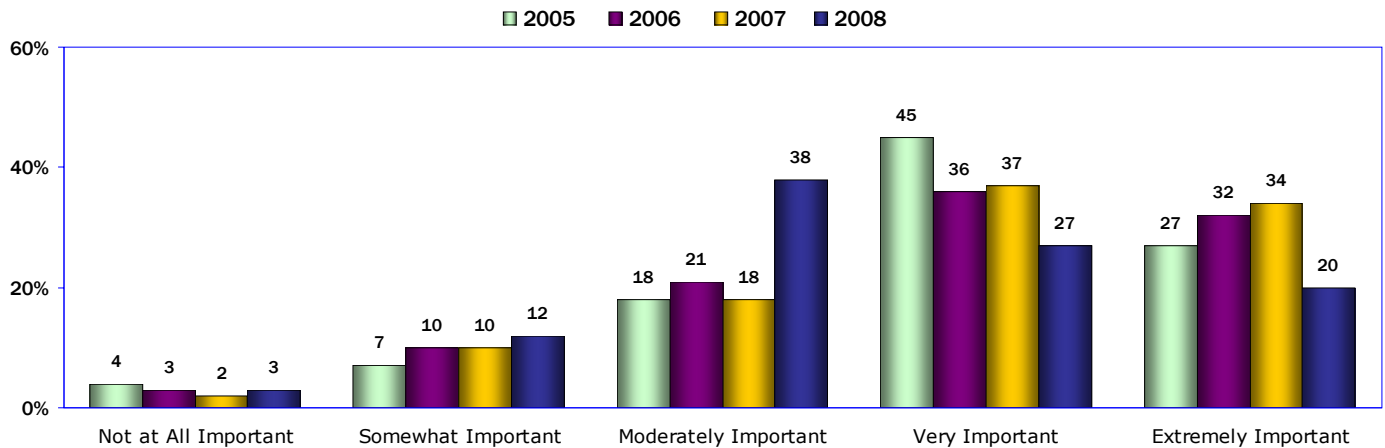
Online Communities: Are They Useful And Important?

A smaller percentage of online community members in the current Digital Future study compared to 2007 said their online communities were useful and important.

In the current study, 47 percent of members of online communities said their community is very important or extremely important to them -- down considerably from 71 percent in 2007.

The largest increase came among users who said their community was moderately important -- 38 percent, compared to 18 percent in 2007.

How Useful and Important is Your Online Community (Or Communities) to You?
(Percentage of Online Community Members)

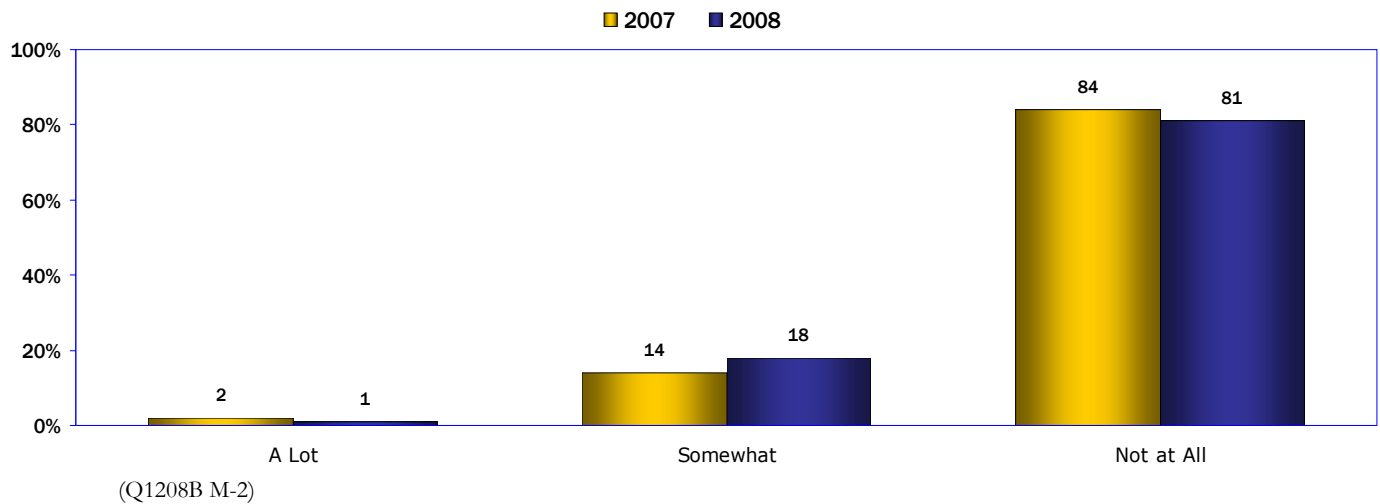


(Q1202B M-2)

Participation In Online Communities: Does It Affect Involvement in Offline Communities?

Most online community members said that their participation in those communities does not affect their involvement in offline communities. However, a small but growing percentage -- 19 percent in the current study, compared to 16 percent in 2007 -- said that this involvement has decreased their involvement in offline communities somewhat or a lot.

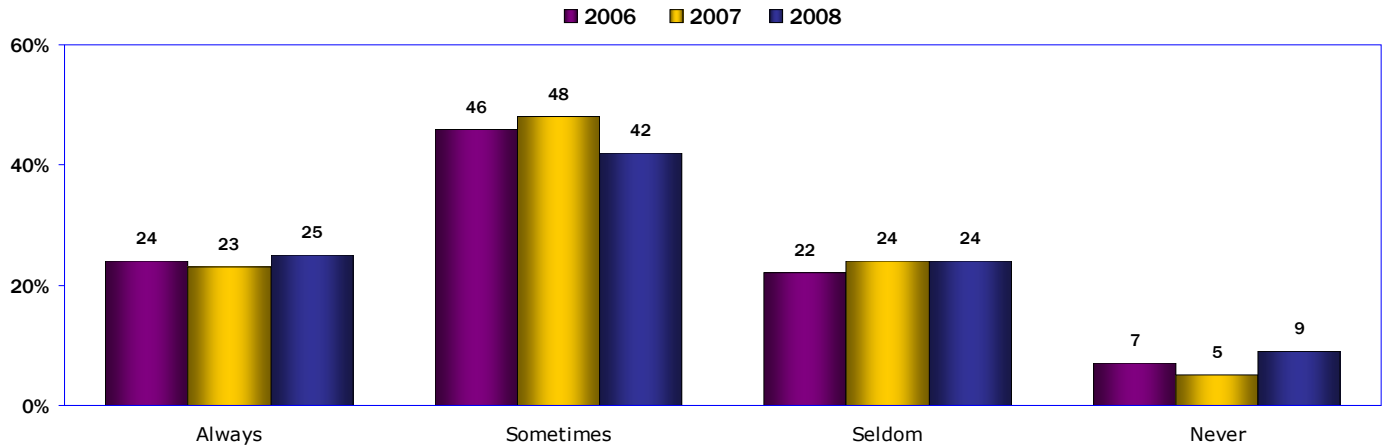
**Has Your Participation in Online Communities
Decreased Your Involvement in Offline Communities?
(Percentage of Online Community Members)**



Online Community Members: Online Interaction

The percentage of online community members who said they never interact with other members of their community increased slightly in the current study -- to nine percent compared to five percent in 2007.

How Often Do You Interact With Other Members Of Your Online Community?
(Percentage of Online Community Members)



(Q1206 M-2)

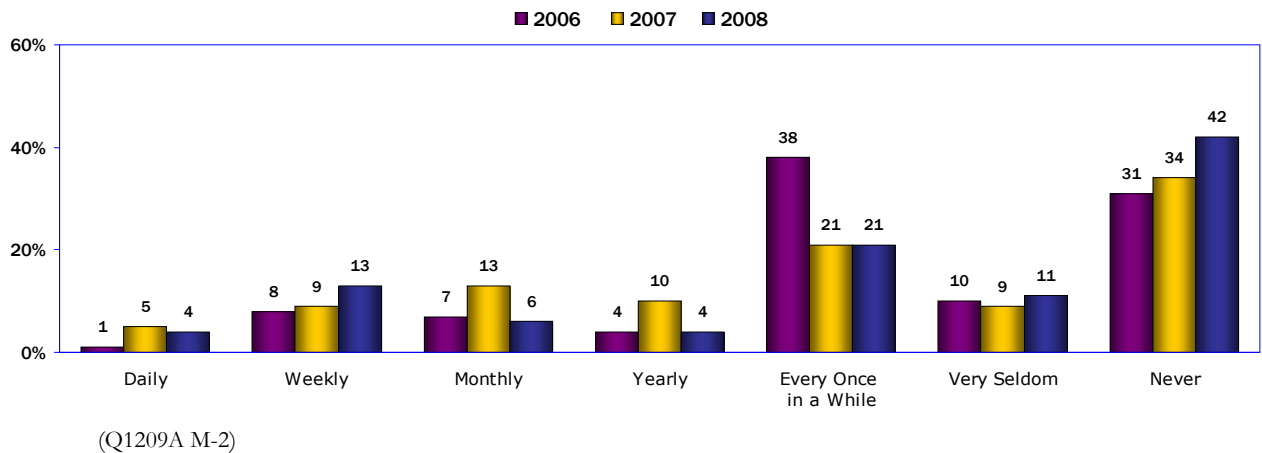
When asked if they usually interact with a particular member once they are logged into their online community, 52 percent of members said yes, and 48 percent said no. (Q1207 M-1)

Online Communities: Connection To Offline Actions

In the current study, an increased percentage of online community members said they never take actions offline that are related to their online community, such as attending a meeting or seeing a doctor.

However, 23 percent of online community members said they take these actions at least monthly, compared to 27 percent in 2007 and 16 percent in 2006.

**How Often do You Take Action Offline, such as Seeing a Doctor or Attending a Meeting,
Related to Your Online Community?
(Percentage of Online Community Members)**

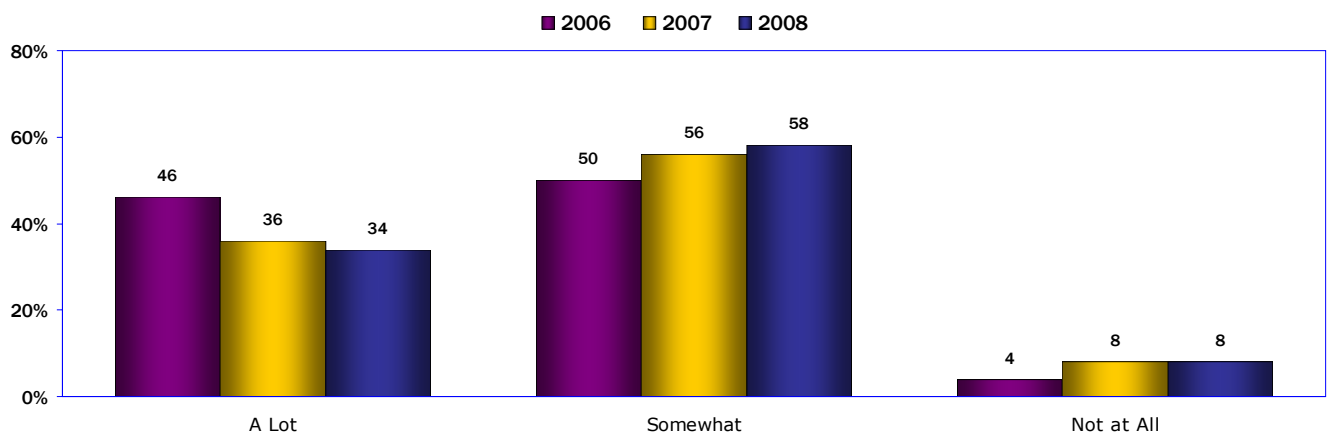


Online Communities: Are They Beneficial for Members?

For the second year in a row, the percentage who find a large amount of benefit from their online community declined.

In the current study, 34 percent said they benefit a lot from their online communities, compared to 36 percent in 2007 and 46 percent in 2006. However, the percentage who find no benefits in that online community remained stable, at eight percent.

How Much d You Think You Benefit from Your Online Community?
(Percentage of Online Community Members)

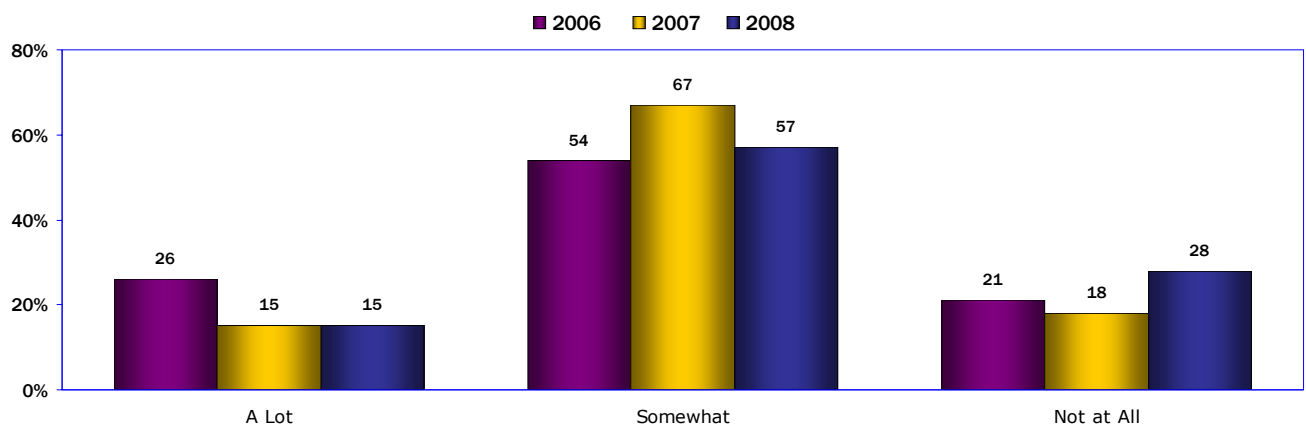


(Q1209B M-2)

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

A growing percentage of online community members said they do not contribute at all to the building of that community -- at 28 percent, the highest figure thus far for this response in the Digital Future studies.

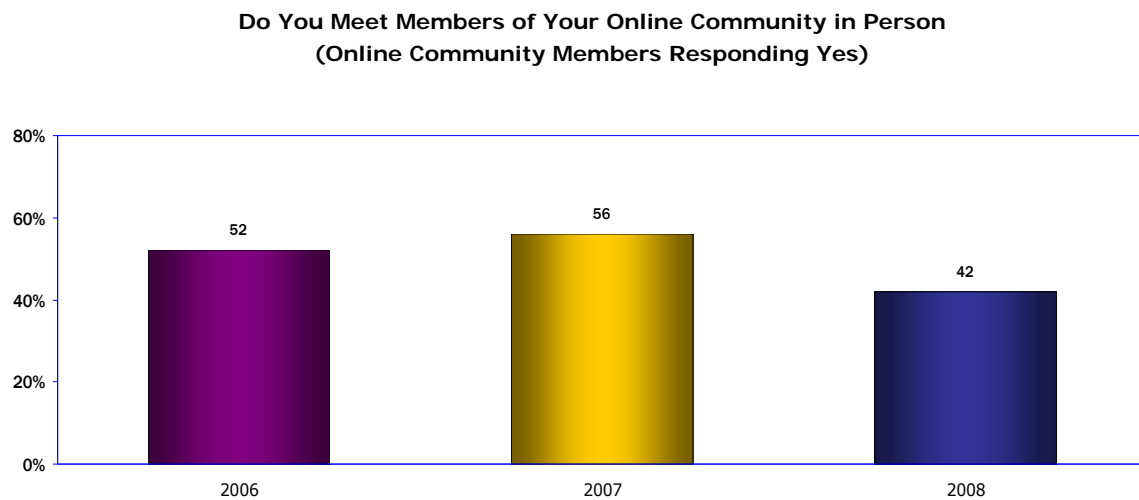
How Much do You Contribute to the Building of Your Online Community?
(Percentage of Online Community Members)



(Q1209D M-2)

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

A declining percentage of online community members said they meet in person with members of their online communities -- at 42 percent, the lowest level thus far.



(Q1208A M-2)

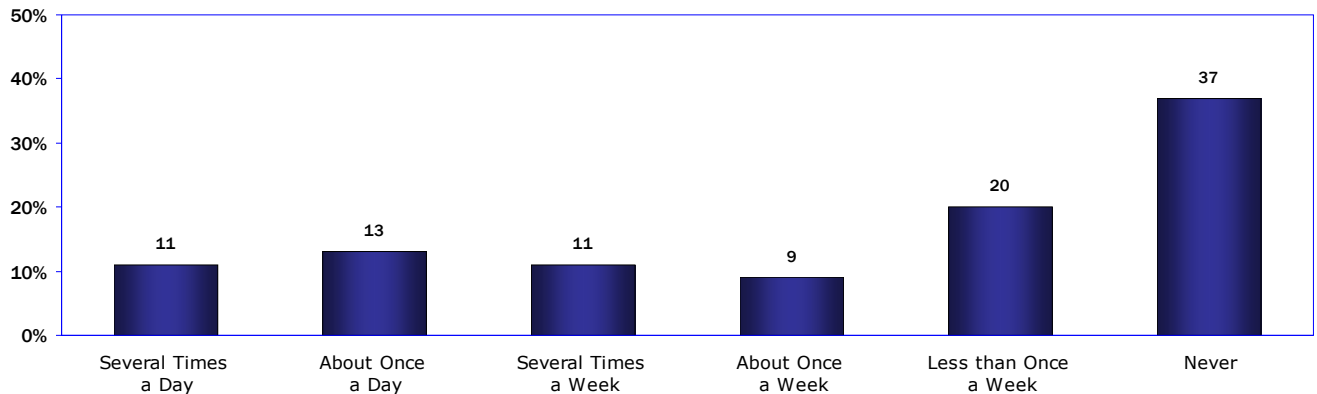
Social Networking Sites

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

When asked about involvement with Web sites for video sharing or social networking such as YouTube or Facebook, 43 percent of Internet users said they use these sites once a week or more.

A significant percentage of Internet users (37 percent) never visit Web sites for video sharing or social networking.

**How Often Do You Visit Web Sites For Video Sharing Or Social Networking
Such As YouTube, Facebook, and MySpace?
(Percentage of Internet Users)**

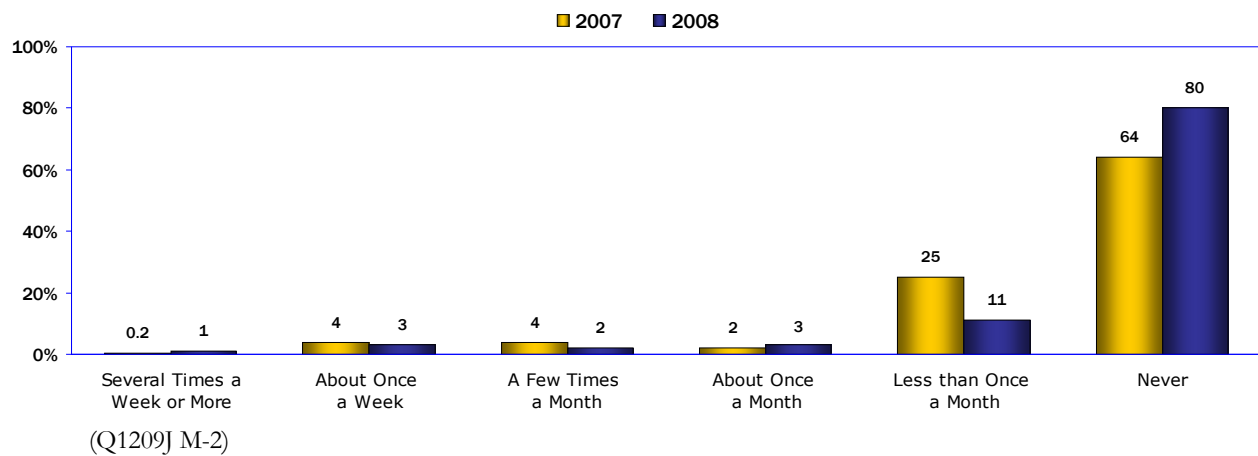


(Q1209H M-1)

Creating Content for Video Sharing or Social Networking Sites

A smaller percentage of Internet users create video or content for these sites. In the current study, only 20 percent of users ever create content, down from 35 percent in 2007.

**How Often Do You Create Videos or Other Content to Post on Web Sites
Such as YouTube, MySpace, and Facebook?
(Percentage of Internet Users)**

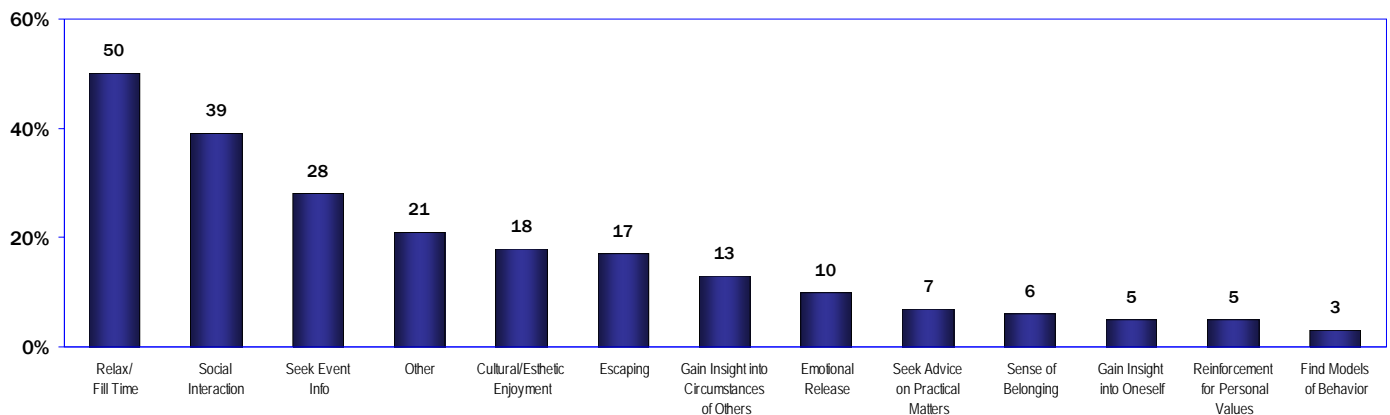


Why Do Online Community Members Visit Web Sites For Video Sharing and Social Networking?

Online community members reported a wide range of reasons for visiting video sharing services such as YouTube, and social networking Web sites such as Facebook and MySpace.

Fifty percent of Internet users who visit Web sites for video sharing or social networking do so to relax or fill time. Thirty-nine percent of users visit these sites for social interaction, and 28 percent to seek information about events. Users also reported several reasons that involve their emotional and ethical development, such as gaining insight into the circumstances of themselves or other members, emotional release, or finding reinforcement for personal values.

**Reasons for Visiting Web Sites for Video Sharing and Social Networking
Such as YouTube, MySpace, and Facebook
(Percentage of Internet Users Who Visit Social Networking Sites)**



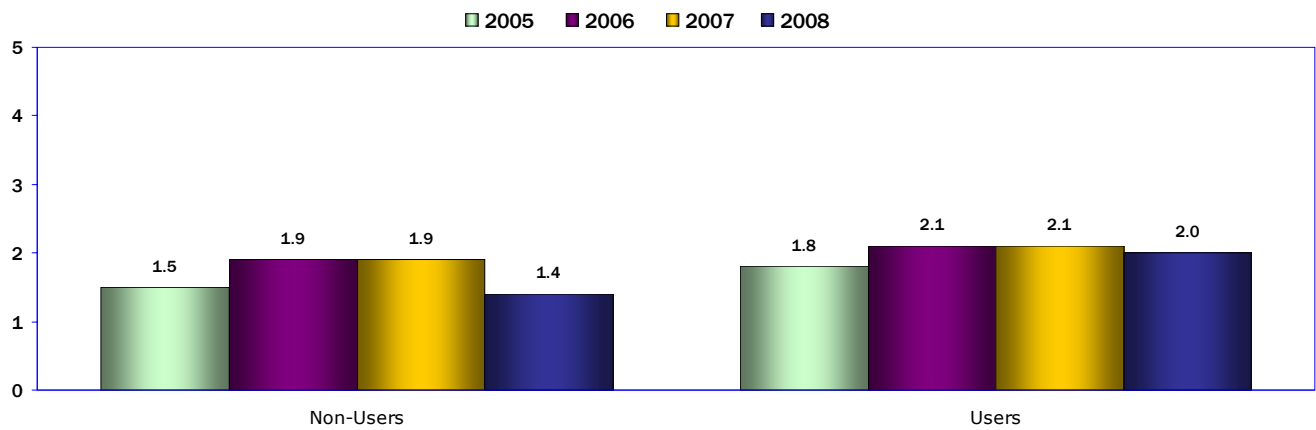
(Q1209I M-1) (Multiple responses possible)

Online Communities And Social Causes

How much time do you spend participating in clubs or voluntary organizations?

In general, Internet users reported spending more time in clubs or volunteer organizations than non-users -- a finding consistent in all four years this question has been asked in the Digital Future studies.

Hours per Week Spent Participating in Clubs or Volunteer Organizations
(Percentage of Internet Non-Users vs. Users)



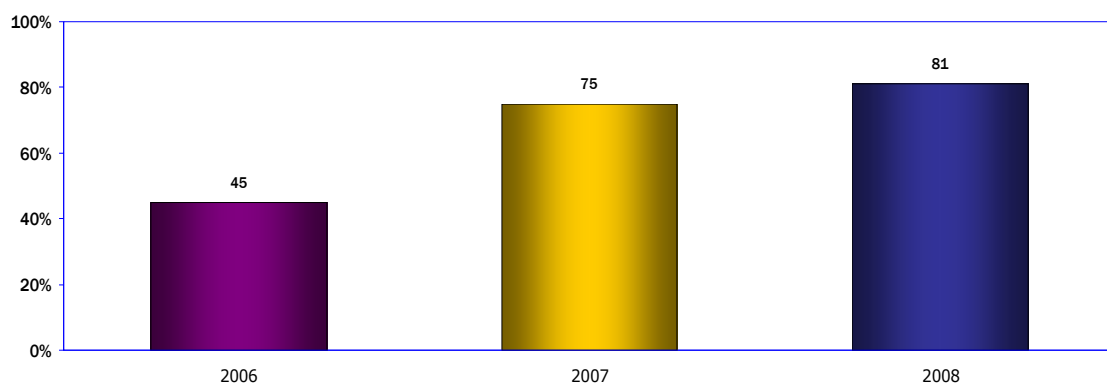
(Q1200 JC-3)

Participation In Online Communities Related To Social Causes

Looking specifically at online communities related to social causes, members of online communities reported high levels of participation in the social causes and non-profit organizations they are involved with on the Internet.

Eighty-one percent of online community members in the current study said they use the Internet to participate in communities related to social causes -- up from 75 percent in 2007.

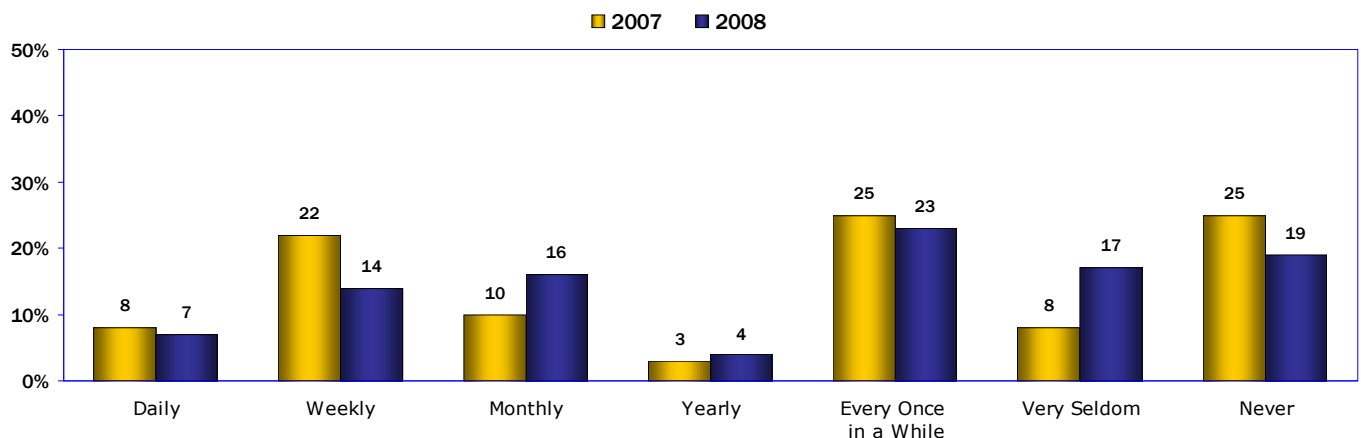
Do You Use The Internet to Participate in Communities Related to Social Causes?
(Members of Online Communities Answering Yes)



(Q1209E M-3)

Thirty-seven percent of online community members said they use the Internet at least monthly to participate in communities related to social causes -- down slightly from 40 percent in 2007. And, the percentage who participate at least weekly declined to 21 percent in the current study from 30 percent in 2007.

How Often do You Use the Internet to Participate in Online Communities Related to Social Causes?
(Percentage of Online Community Members)

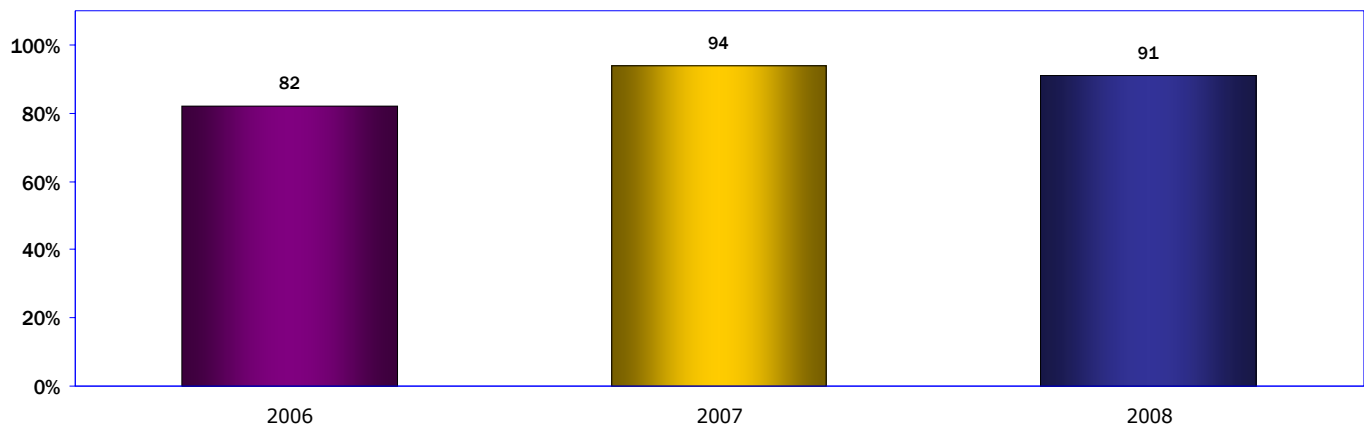


(Q1209E M-2)

The Internet as an Information Source about Social Causes

The percentage of online community members who said the Internet helps them stay informed about social causes remains high in the current study (91 percent).

Has the Internet Helped You be More Informed about Social Causes?
(Percentage of Online Community Members Responding Yes)

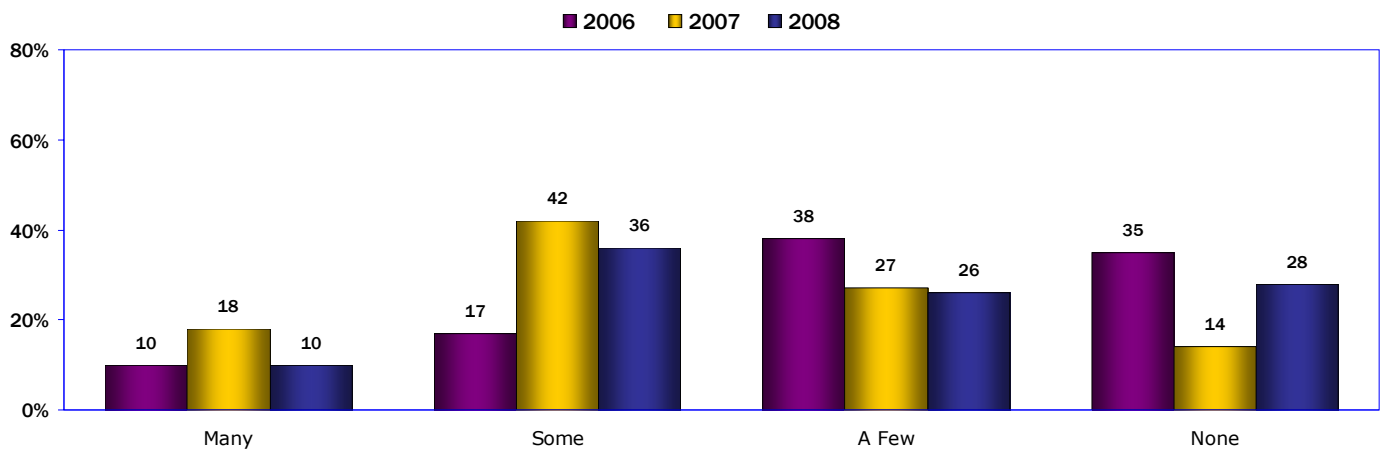


(Q1209F M-3)

Do Online Communities Encourage Members to Participate in Social Causes?

A smaller percentage of online community members (72 percent) said that they are participating in social causes that are new to them since their involvement in online communities began.

**How Many Social Causes that You Participate in are New to You
Since Becoming Involved in Online Communities?
(Percentage of Online Community Members Who Participate in Social Causes)**



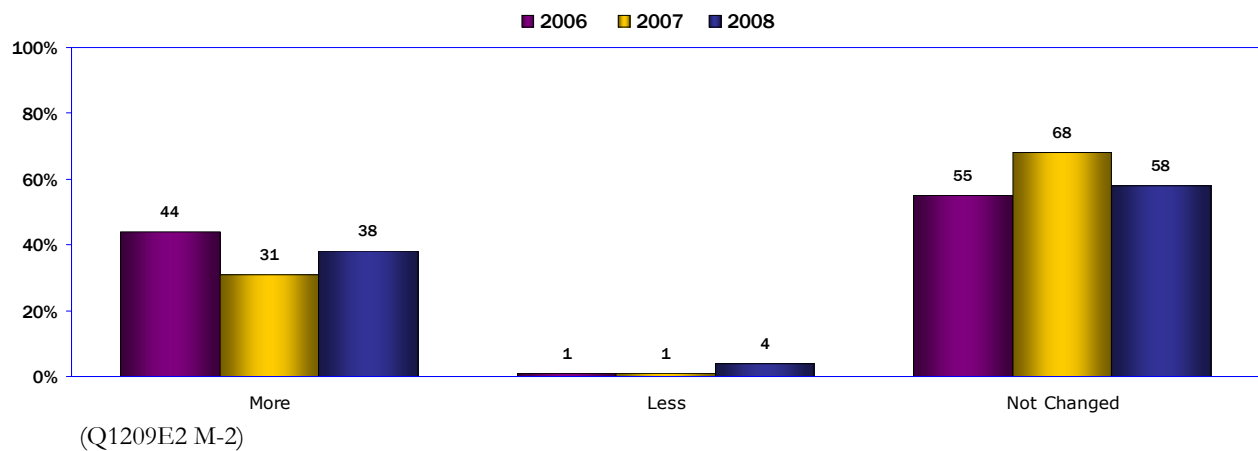
(Q1209E1 M-2)

Social Activism And Participation In Online Communities

A larger percentage of users in the current Digital Future study compared to 2007 said their activism has increased since they began participating in online communities.

Thirty-eight percent of online community members said they participate more in social activism since they started participating in online communities.

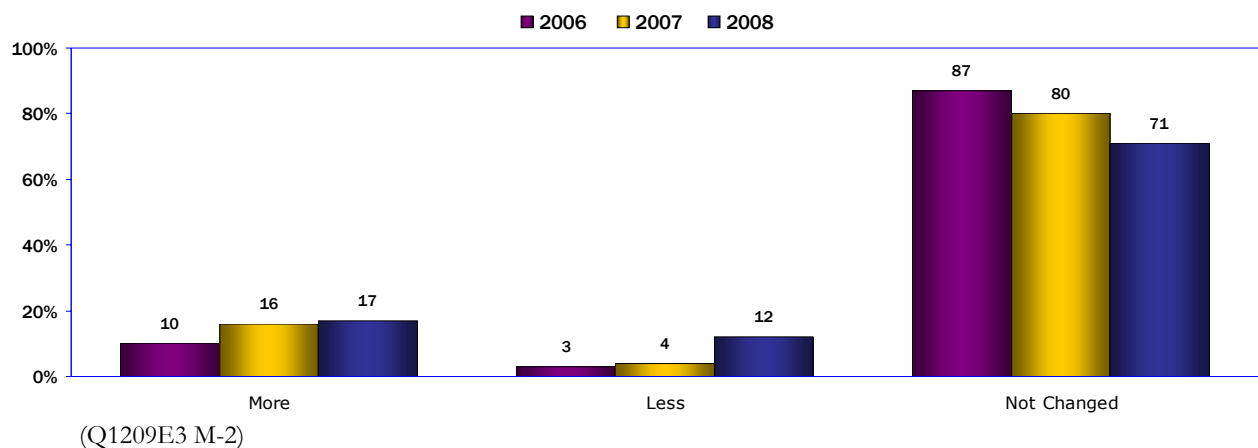
Effect on Social Activism since Participating in Online Communities
(Percentage of Online Community Members Who Participate in Social Causes)



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

Although large percentages of online community members said they participate in social causes online, only 17 percent said that they are involved more often in offline social issues as a result of their online participation.

Participation in Social Causes Offline as a Result of Participation in Online Communities
(Percentage of Online Community Members who Participate in Social Causes)

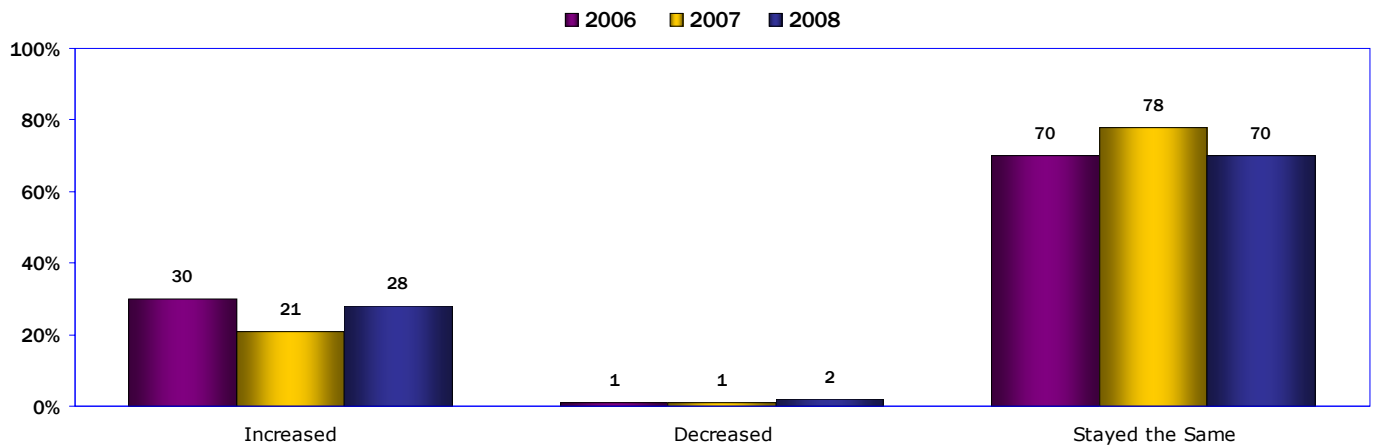


Online Communities: Participation In Non-Profit Organizations

A larger percentage of online community members reported that their participation in non-profit organizations has grown since they first started using the Internet.

Twenty-eight percent of online community members said their involvement in non-profit organizations has increased since they began using the Internet.

Level of Involvement in Non-Profit Organizations since Internet Use Began
(Percentage of Online Community Members)



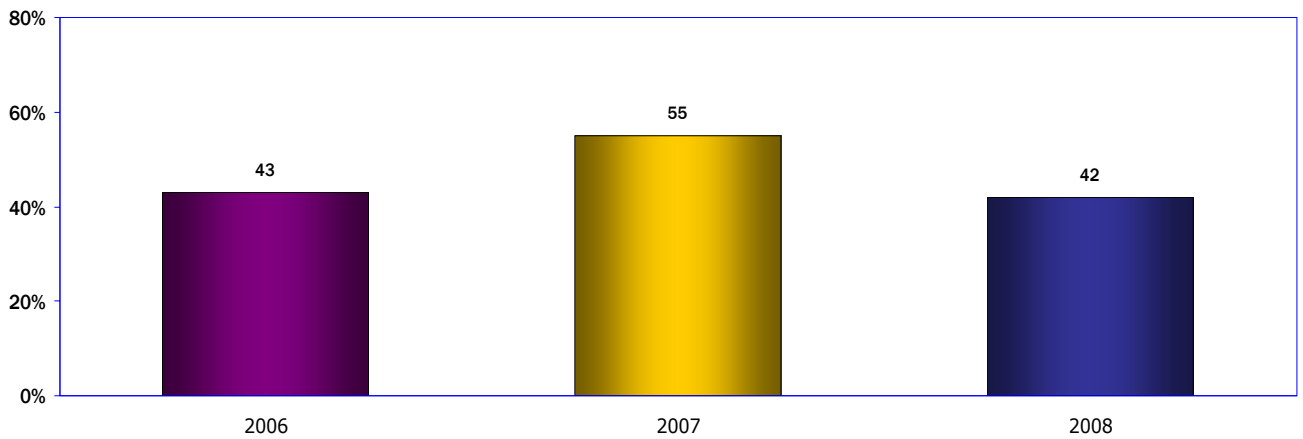
(Q1209G M-2)

Online Communities: Are They as Important as the Real World?

A smaller percentage of members of online communities feel as strongly about their online communities as they do about their real-world communities.

Forty-two percent of online community members said they feel as strongly about their online communities as they feel about their real-world communities.

**Do You Feel as Strongly about Your Online Community
as You Feel about Your Real-World Community?
(Percentage of Online Communities Members Answering Yes)**



(Q1209C M-2)

Children And The Internet

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

....spend too much time online 28%

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

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

69%

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

76%

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

61%

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

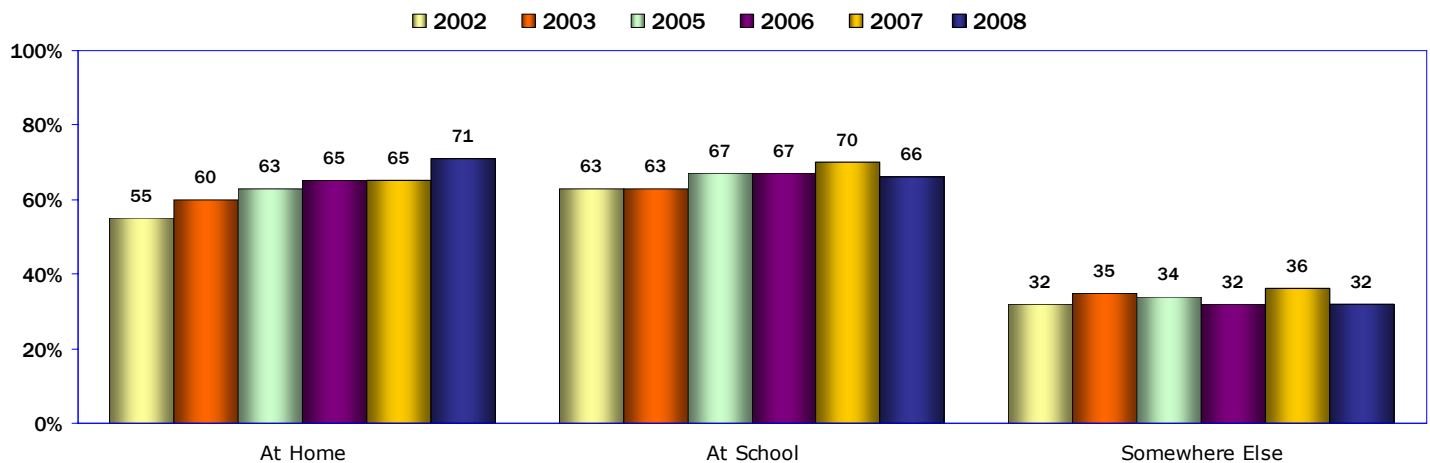
55%

Children And The Internet

From What Locations Do Users Under 18 Go Online?

Most adults said that the children in their households go online at home (71 percent), up from 65 percent in 2007. Sixty-six percent said the children go online at school. However, almost one-third of adults said the children in their households go online at some other undefined location other than home and school.

Internet Use Locations
(Percentage of Adult Respondents with Children in the Household)



(Q1040, 1050, 1060, M-4) (Multiple responses possible)

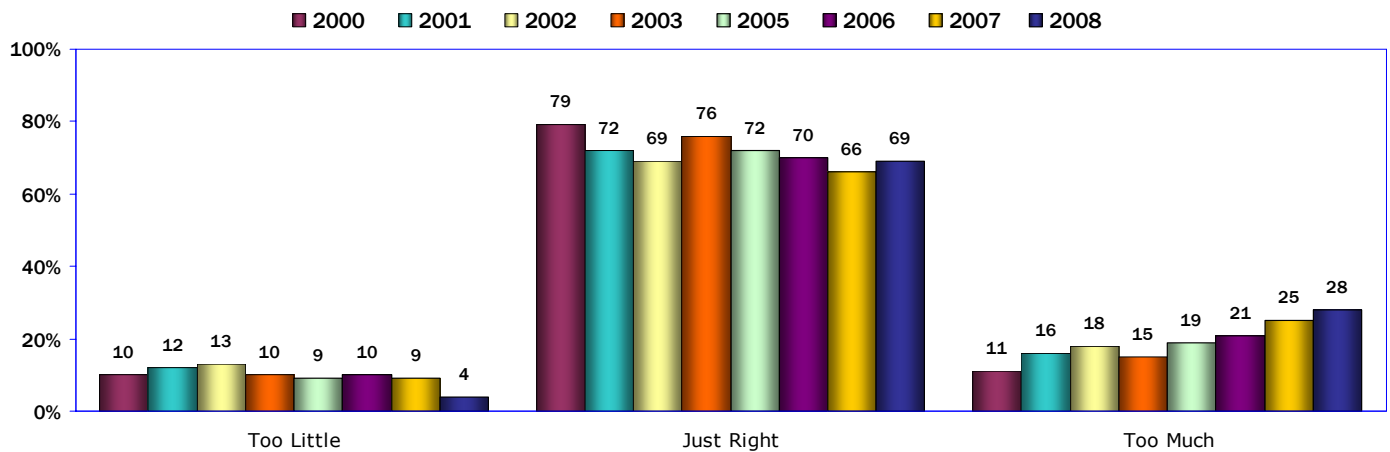
Internet Use: The Right Amount Of Time For Children?

How do adults view the time the children in their households spend online?

For the fourth year in a row, the percentage of adults who said that the children in their households spend too much time using the Internet has increased -- in the current study, to 28 percent of respondents -- another new high for the Digital Future Project.

A much larger and growing percentage of adults said the children in their households spend the right amount of time online -- a slight increase after the response to this question reached its lowest level in 2007.

Children Online: The Right Amount Of Time?
(Percentage of Adult Respondents with Children in the Household)



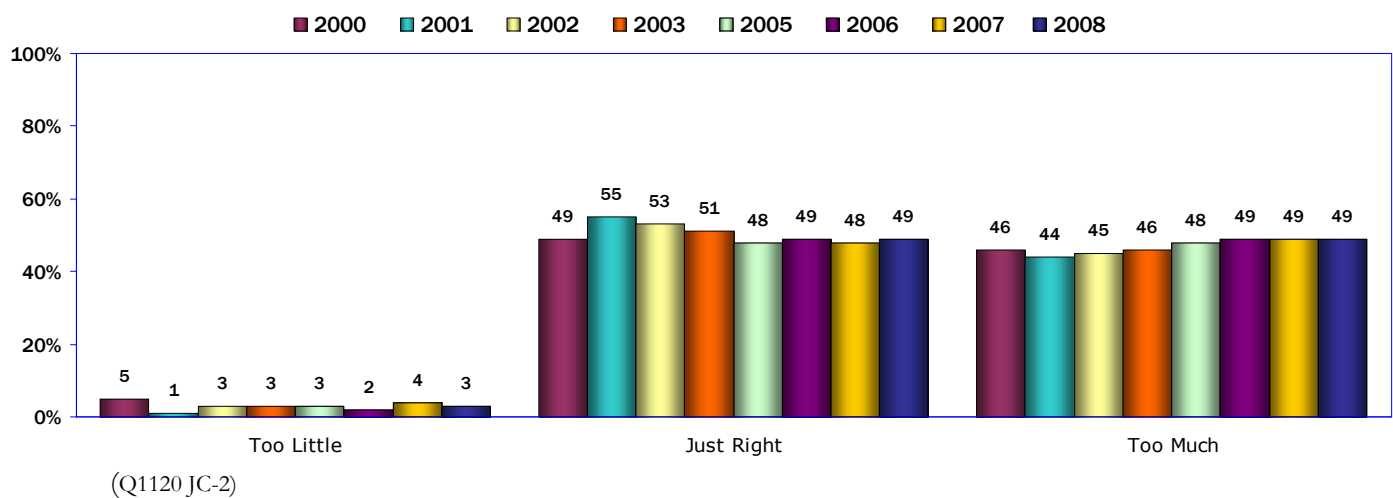
(Q1120 JC-3)

Television Viewing: The Right Amount Of Time For Children?

In comparison to adults' views of the amount of time children spend online, a much higher percentage said that the children in their households spend too much time watching television.

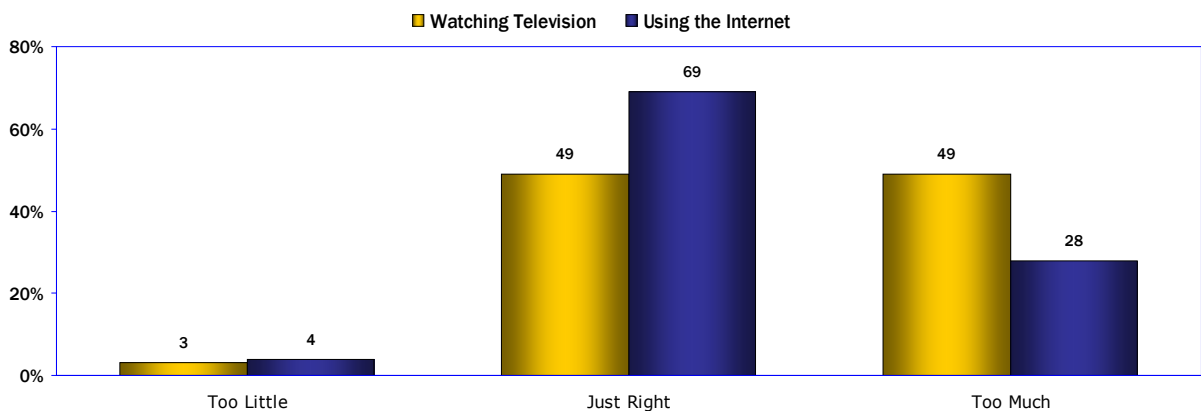
For a comparison of adults' views on children's time spent online vs. time spent watching television, see the lower chart.

Children Watching TV: The Right Amount of Time?
(Percentage of Adult Respondents with Children in the Household)



At a Glance: Adult Views of Children's Time Watching Television and Going Online

Children Online and Watching Television: The Right Amount Of Time?
(Percentage of Adult Respondents with Children in the Household)



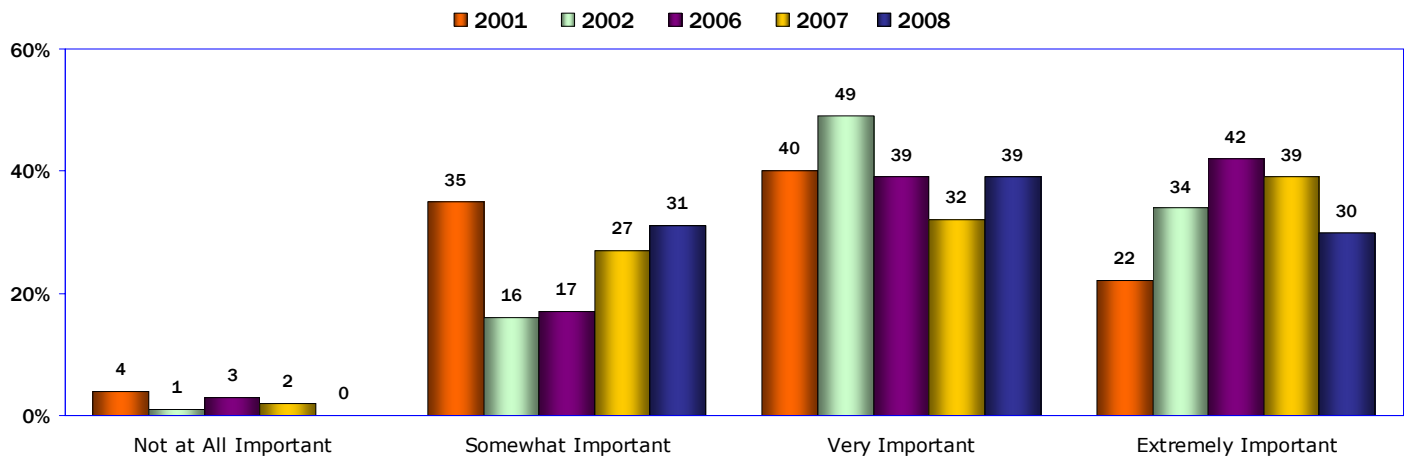
The Internet and Schoolwork: Children's Views

As in all of the Digital Future studies, children and adults responding in the current survey continue to express contrasting opinions about the value of the Internet for schoolwork.

In the current study, for the first time all Internet users age 18 and under said that going online plays some level of importance in their schoolwork; no respondents said the Internet was not at all important. However, the percentage citing the highest levels of importance has declined for three years in a row; sixty-nine percent of children said that the Internet was very important or extremely important for their schoolwork -- down from 71 percent in 2007, 81 percent in 2006, and 83 percent in 2005.

The number of Internet users age 18 and under who said that going online was only somewhat important has increased for the third year in a row, and has now reached 31 percent of respondents age 18 and younger.

**How Important is the Internet for Your Schoolwork?
(Percentage of Internet Users Age 18 and Younger)**



(Q1135 JC-2)

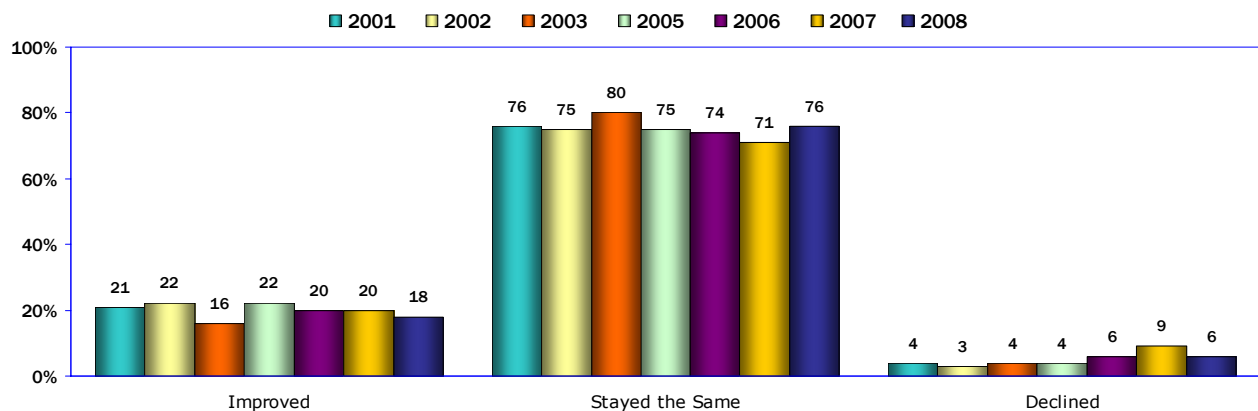
Internet Use And School Grades: The Adults' View

As in the six previous years of the Digital Future Project, adults take a different view than children of the Internet's value for schoolwork. Large percentages of adults continue to believe that going online has no effect on grades, and the adult view of the Internet as a negative influence on grades is growing.

Even though all children in the current study said that going online has some importance to their schoolwork, more than three-quarters of adults (76 percent) said that the Internet has no effect on school grades for the children in their household.

And, the percentage of adults who said that the grades of the children in their household has improved since the household started to use the Internet has declined slightly (18 percent).

The Internet: Effect on Children's School Grades
(Percentage of Adult Respondents with Children in the Household)



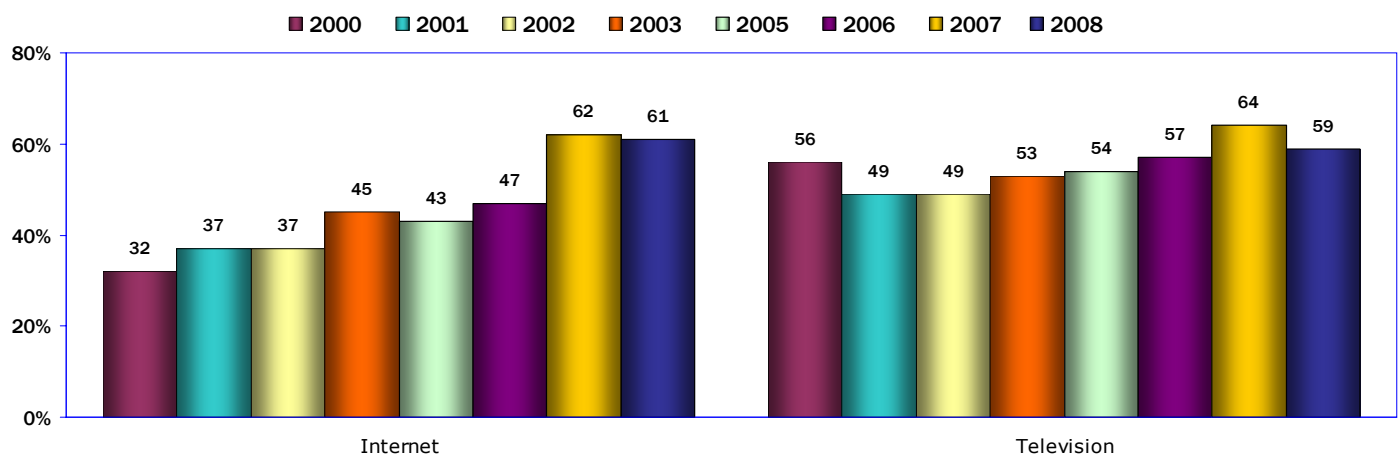
(Q1080 M-3)

Internet Use And Television Viewing: Use As Punishment Tools

Punishing children by denying them access to the Internet or television declined marginally from 2007.

Denial of television as punishment declined to 59 percent from 64 percent in 2007.

Internet Access and Television Viewing: Denied as a Punishment Tool
(Percentage of Adult Respondents with Children in the Household)



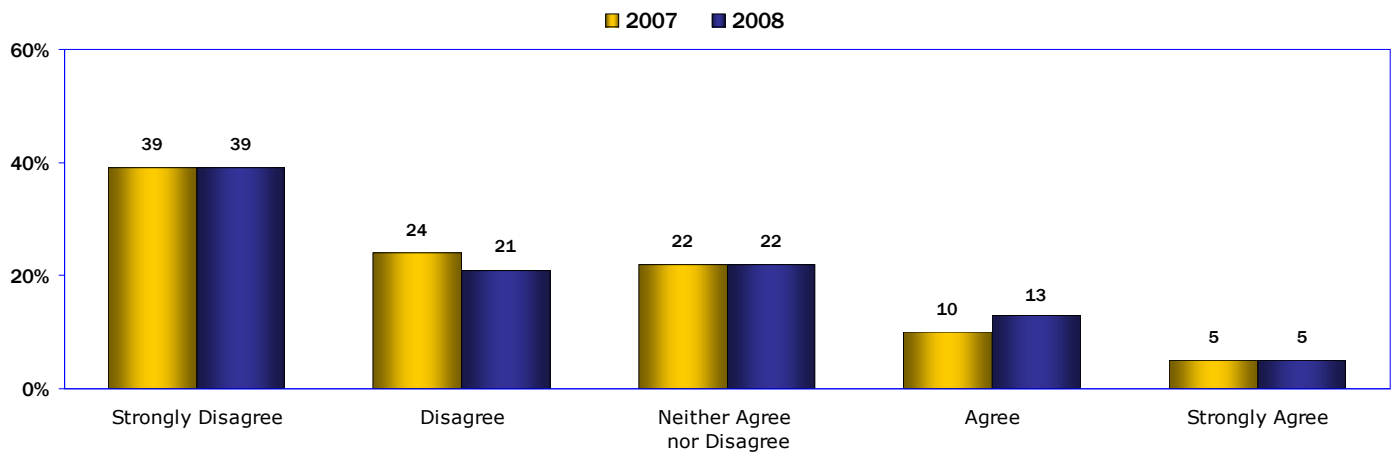
(Q1070 M-3; Q1100)

Children Participating In Online Communities: The Adult View

A small but slightly larger percentage of adults in the current Digital Future study compared to 2007 are comfortable with the participation of the children in their households in online communities.

Eighteen percent of adults agreed or strongly agreed that they were comfortable with the children in their households participating in online communities -- up from 15 percent in 2007. Sixty percent disagreed or strongly disagreed, down slightly from 63 percent in 2007.

I am Comfortable with the Children in My Household Participating in Online Communities
(Percentage of Adult Respondents with Children in the Household)



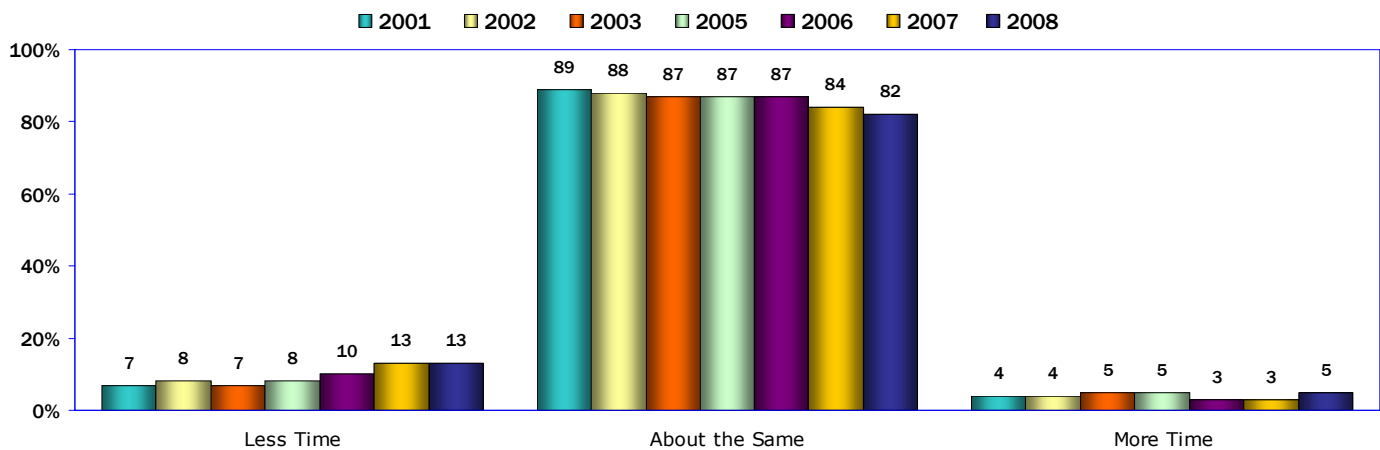
(Q533 M-4)

Children And Time Spent With Friends

Eighty-seven percent of adults said that the children in their household spend the same amount of time or more time with friends since using the Internet -- the same overall percentage as in 2007.

The percentage of adults who said that their children spend less time with friends remains at its high point in the Digital Future Project.

Children's Time Spent with Friends Since Using the Internet
(Percentage of Adult Respondents with Children in the Household)



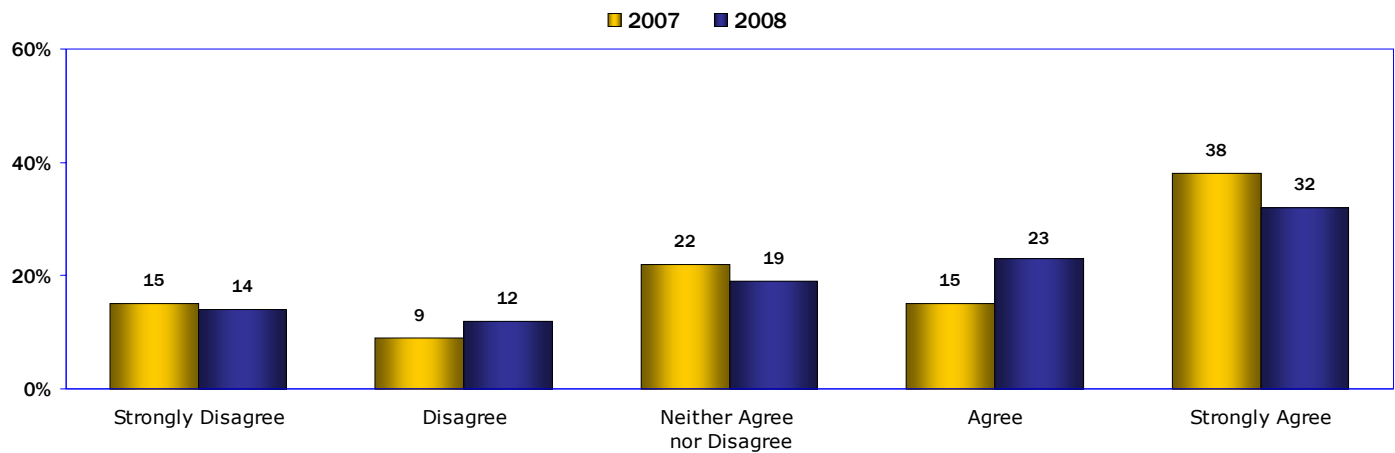
(Q1090 M-2)

Online Predators: Are They A Threat To Children?

A large percentage of adults said that online predators are a threat to the children in their households.

Fifty-four percent of adults agree or strongly agree that online predators pose a threat to children in their household, compared to 53 percent in 2007 -- the first year this question was asked.

Online Predators are a Threat to the Children in My Household
(Percentage of Adult Respondents with Children in the Household)



(Q533 M-5)

Political Power And Influence

Users who said. . .

*. . . the Internet has become important
for political campaigns* **61%**

*. . . by using the Internet public officials
will care about what people think* **21%**

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

*. . . the Internet can give people
more say in what government does* **24%**

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

*Users who went online to gather
political information* **37%**

*Users who were satisfied with
election information they found online* **82%**

*Respondents who agree that they are
interested in voting online* **39%**

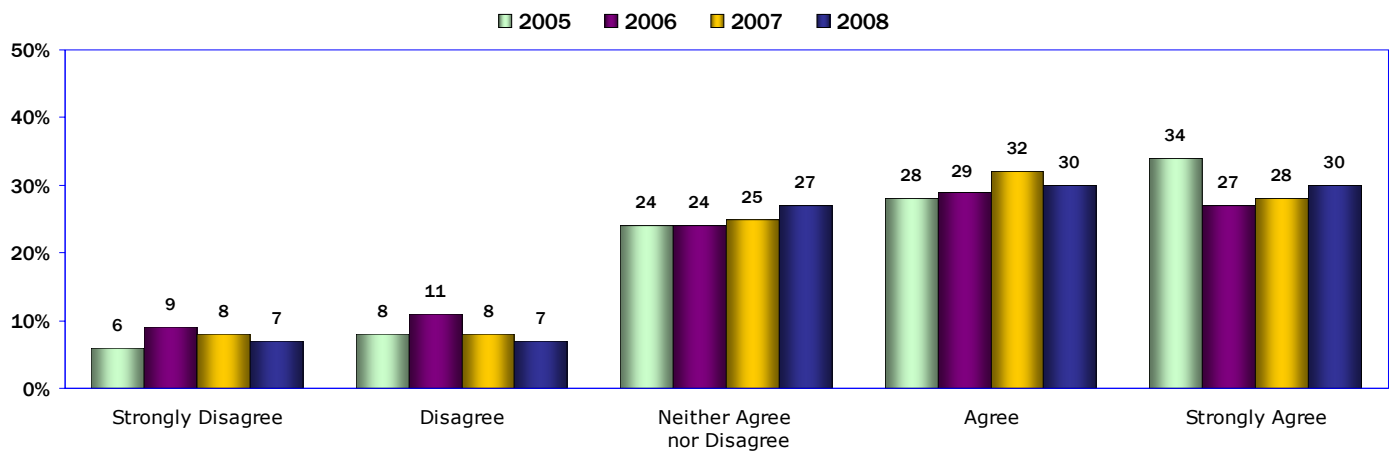
Is the Internet Important In Political Campaigns?

Although the use of online technology in politics grew dramatically during the most recent presidential election, the percentage of respondents who think that the Internet has become important for political campaigns remains unchanged from 2007.

Among all respondents, 60 percent agree or strongly agree in the current study and in 2007 that the Internet has become important for the political campaign process.

However, a slightly smaller percentage compared to 2007 disagree or strongly disagree that the Internet has become important in political campaigns (14 percent in the current study compared to 16 percent in 2007).

The Internet Has Become Important for the Political Campaign Process
(Percentage of Respondents Age 16 and Older)

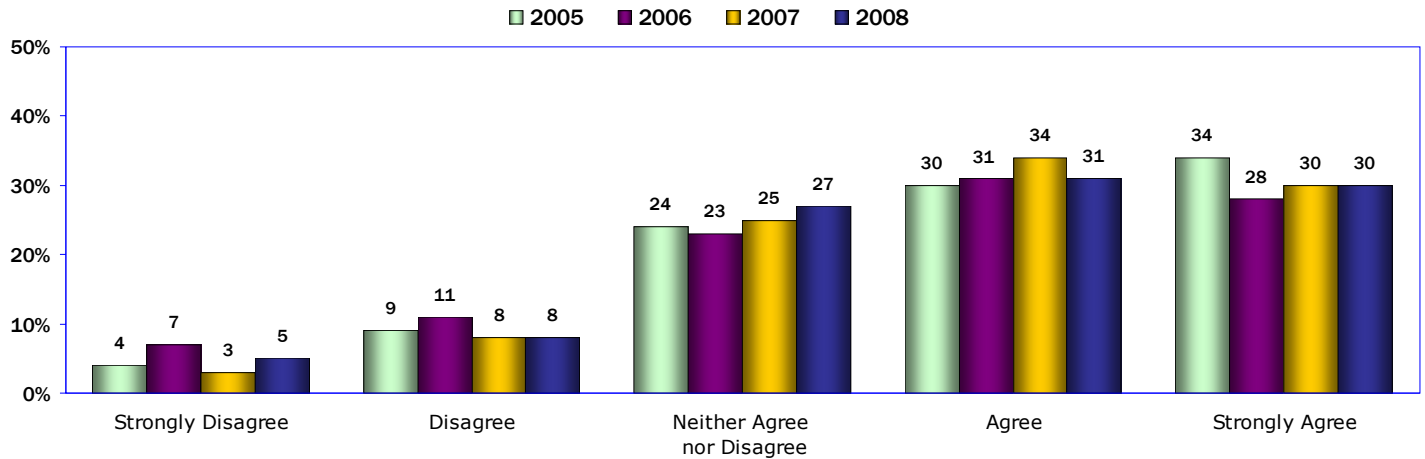


(Q190e M-2)

Is the Internet Important in Political Campaigns? (Users vs. Non-Users)

Among Internet users, 61 percent agree or strongly agree that the Internet has become important for political campaigns -- down marginally from 64 percent in 2007.

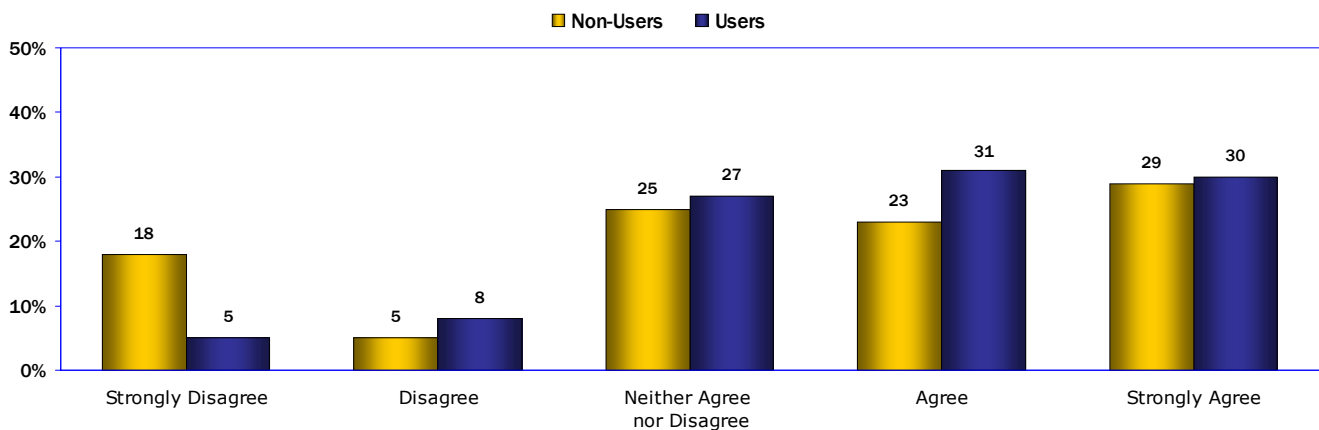
The Internet Has Become Important for the Political Campaign Process
(Percentage of Internet Users Age 16 and Older)



(Q190e M-4)

Comparing Internet users and non-users shows a modest disparity in views. Twenty-three percent of non-users disagree or strongly disagree that the Internet is important in political campaigns, compared to 13 percent of users.

The Internet Has Become Important for the Political Campaign Process
(Percentage of Internet users vs. Non-users Age 16 and Older)



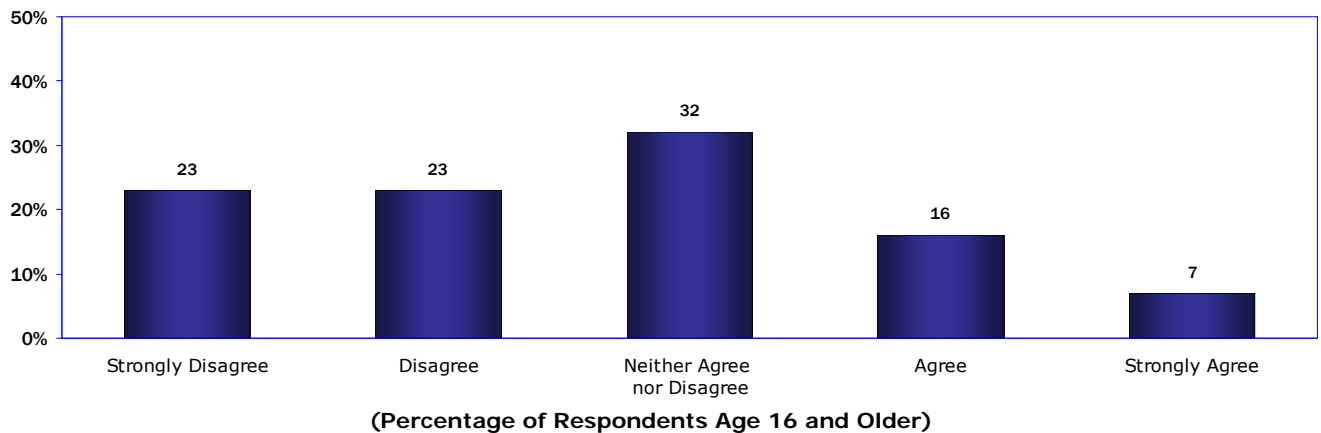
(Q190e M-3)

Is the Internet A Tool For Political Influence?

Can the Internet encourage public officials to care more about what people think? Less than one-quarter of all respondents (23 percent) agree with that statement.

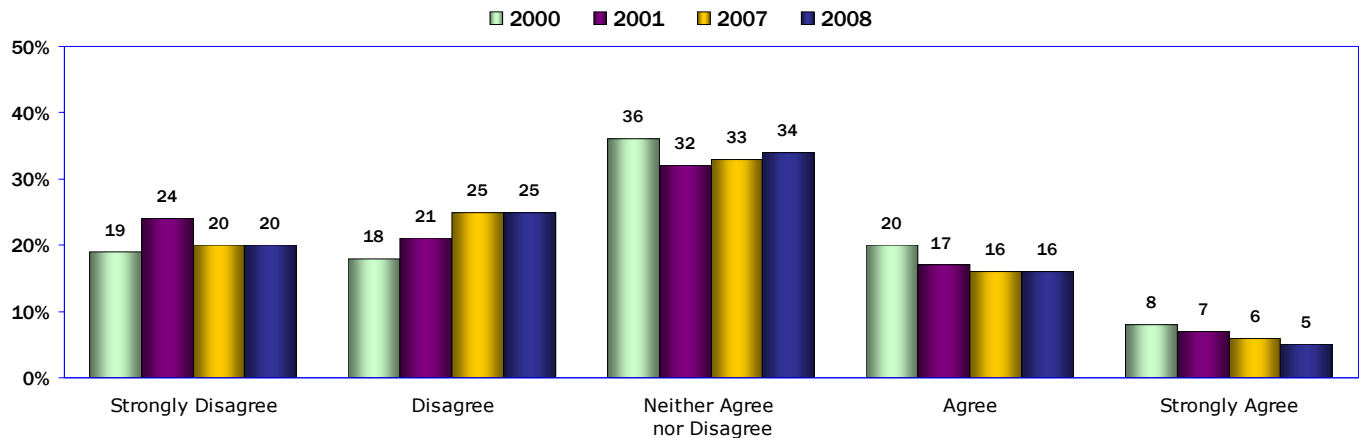
An even smaller percentage of Internet users -- 21 percent -- agree or strongly agree that by using the Internet public officials will care more about what people think (see lower chart), down from 22 percent in 2007, 24 percent in 2001 and 28 percent in 2000.

By Using the Internet Public Officials Will Care More about What People Think



(Q190d M-1)

By Using the Internet Public Officials Will Care More about What People Think (Percentage of Internet Users Age 16 and Older)



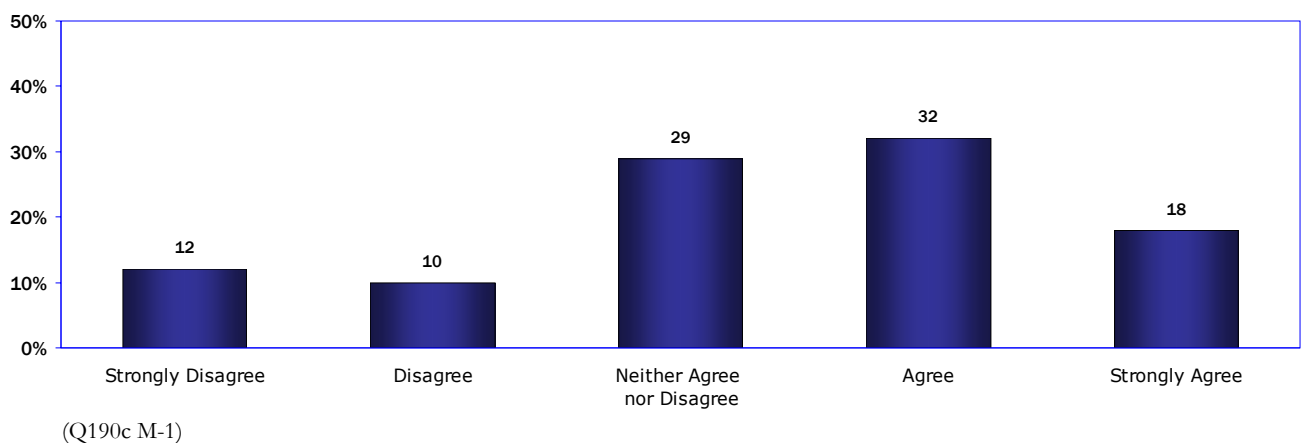
(Q190d M-3)

The Internet: A Tool for Understanding Politics

Low percentages of respondents believe that the Internet is a tool for public influence (see previous page), but higher percentages said that going online can help people better understand politics.

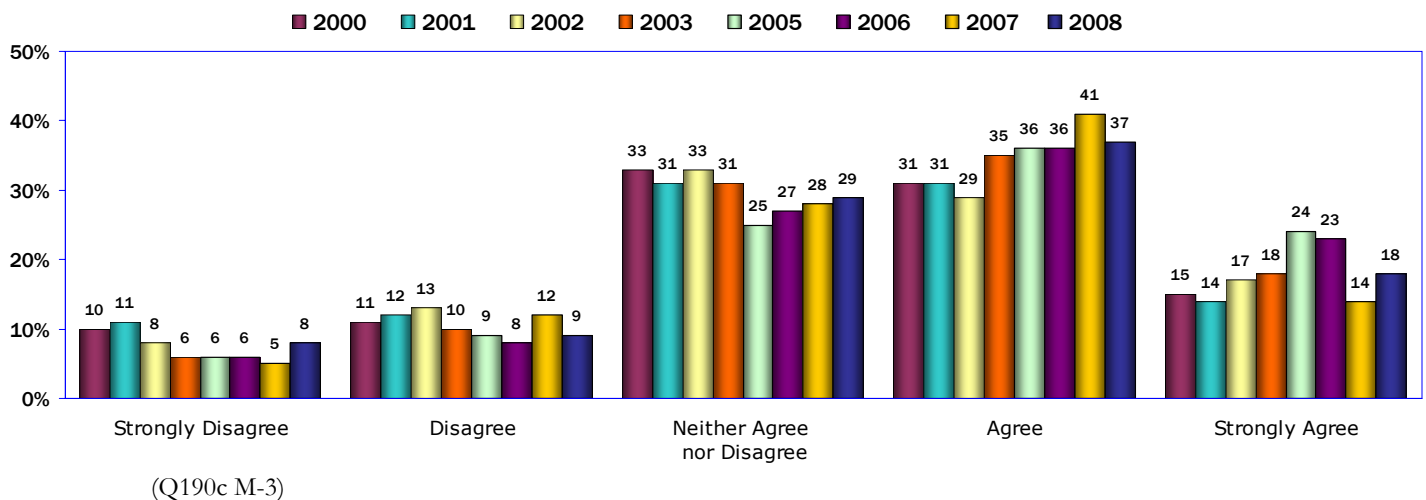
Half of all respondents agree or strongly agree that the Internet allows people to better understand politics.

Using The Internet Allows People To Better Understand Politics
(Percentage of Respondents Age 16 and Older)



Among users, 55 percent agree or strongly agree that the Internet can help people better understand politics, the same level as in 2007.

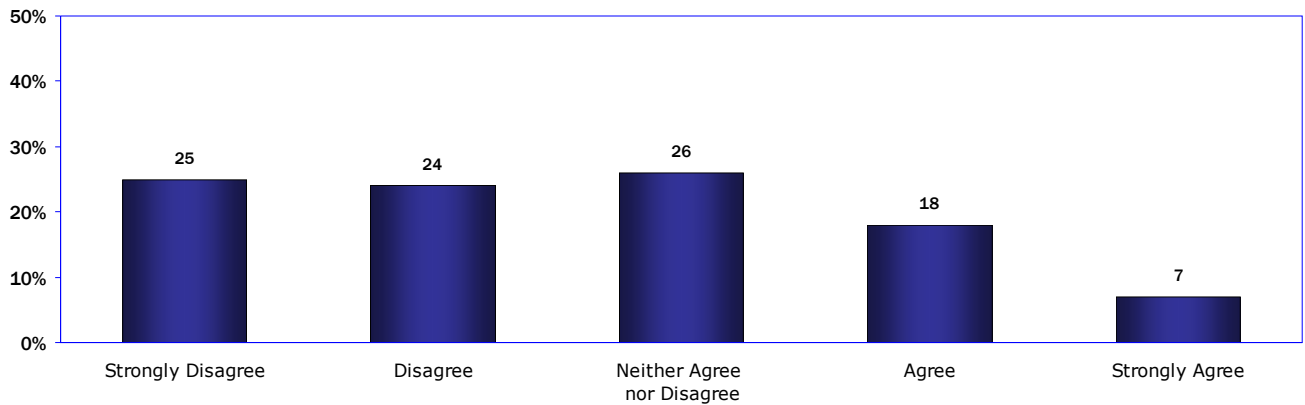
By Using The Internet, People Like You Can Better Understand Politics
(Percentage of Internet Users Age 16 and Older)



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

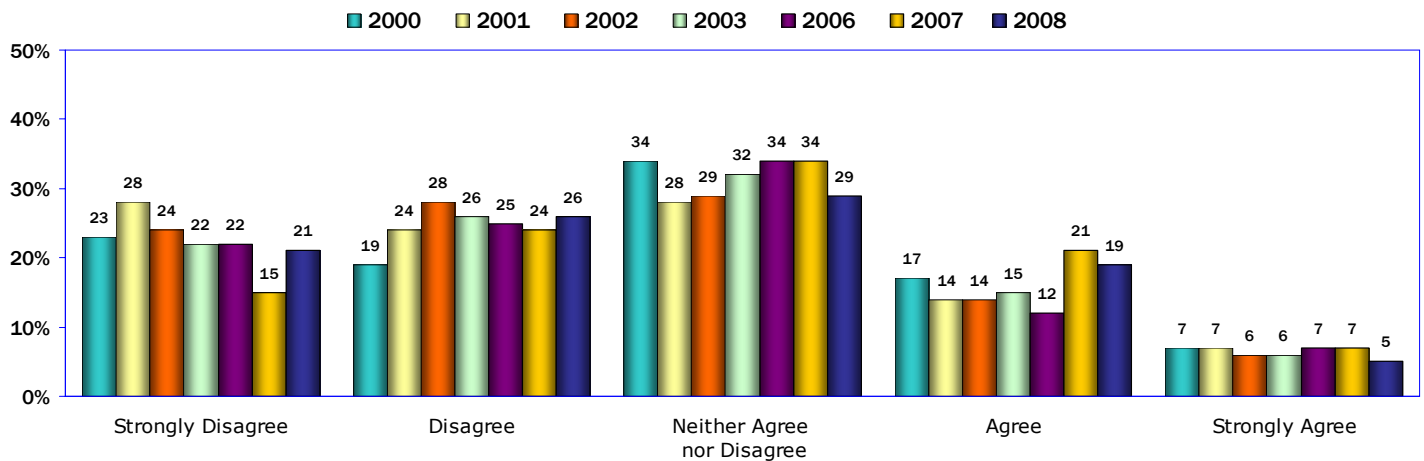
When asked if using the Internet gives people more of a say in what government does, 25 percent of all respondents age 16 or older agreed or strongly agreed.

**By Using the Internet, People Like You Can Have More Say in What the Government Does
(Percentage of Respondents Age 16 and Older)**



(Q190b M-1)

**By Using The Internet, People Like You Can Have More Say in What the Government Does
(Percentage of Internet Users Age 16 and Older)**



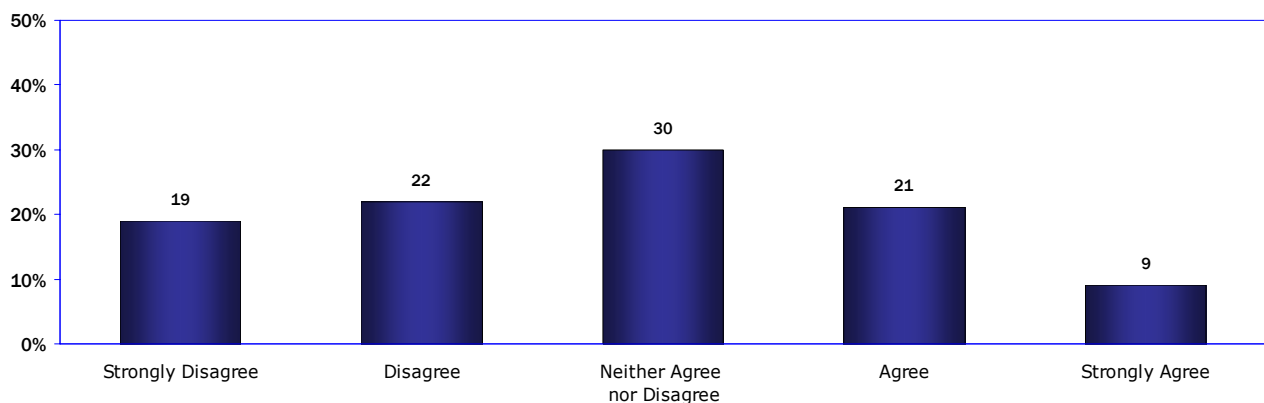
(Q190b M-3)

The Internet as a Tool to Help Gain Political Power

Thirty percent of all respondents agree or strongly agree that by using the Internet, people like them can have more political power. However, an even larger percentage (41 percent) disagree with that statement.

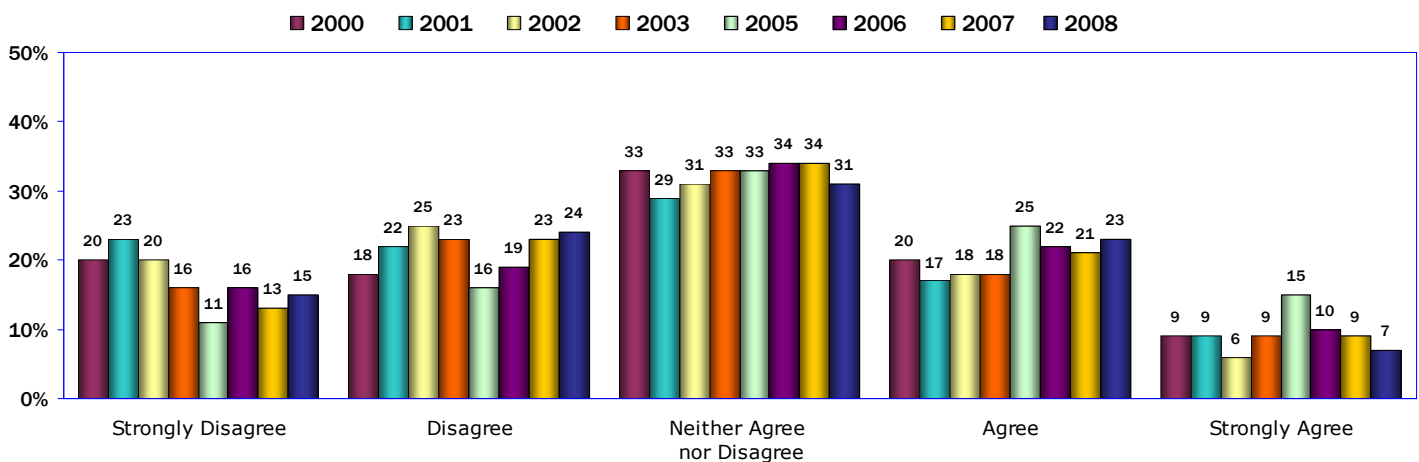
Among Internet users (see lower chart), 30 percent agreed or strongly agreed that the Internet can give people like them more political power -- identical to 2007 and slightly below 32 percent in 2006.

**By Using the Internet People Like You Can Have More Political Power
(Percentage of Respondents Age 16 and Older)**



(Q190a M-1)

**By Using the Internet People Like You Can Have More Political Power
(Percentage of Internet Users Age 16 and Older)**

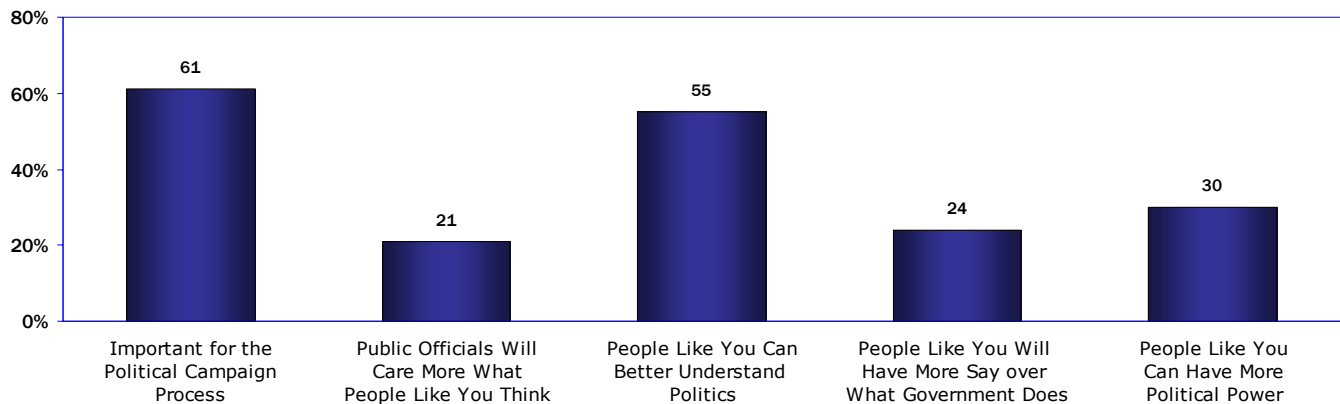


(Q190a M-3)

At a Glance: Views about the Internet and Politics

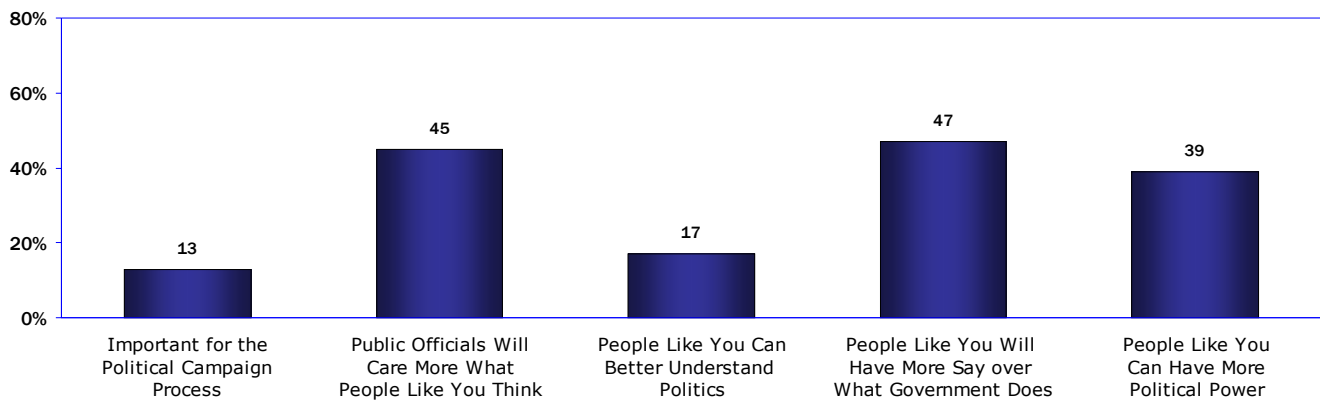
In summary, large percentages of Internet users in the current Digital Future study said that the Internet is important for campaign knowledge-building and understanding politics. However, much smaller percentages said that the Internet will influence if public officials will care more about what people think, or if it will help people like them have more political power or a say in what government does.

Views about the Internet and Politics
(Percentage of Internet Users who Responded "Agree" or "Strongly Agree")



(Q190 combined agree)

Views about the Internet and Politics
(Percentage of Internet Users who Responded "Disagree" or "Strongly Disagree")

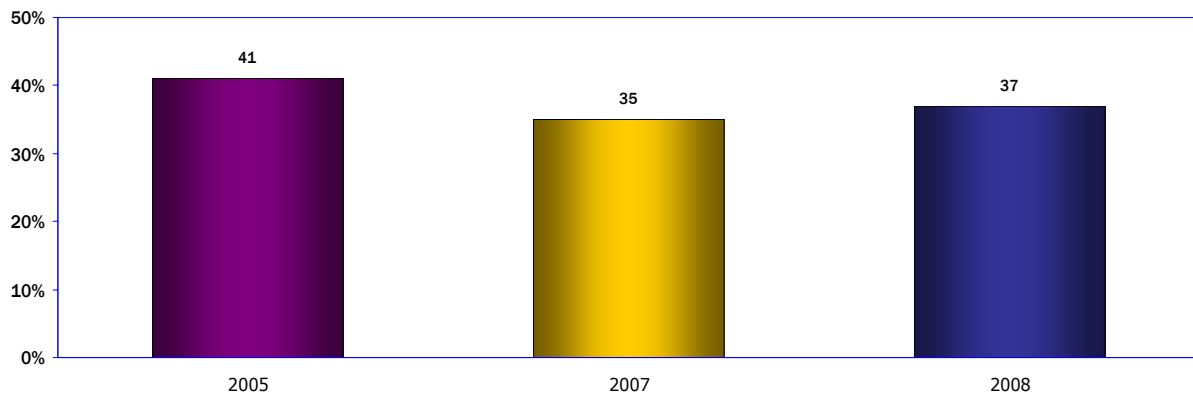


(Q190 combined disagree)

The Internet and Information-Gathering during Election Campaigns

The percentage of Internet users who went online to gather information during the most recent significant election in their area increased to 37 percent of adult users in the current study, an increase over 2007 but slightly below the peak of 41 percent in 2006, the first year this question was asked.

Did You Use the Internet to Gather Information during the Last Significant Election in Your Area?
(Percentage of Adult Internet Users)

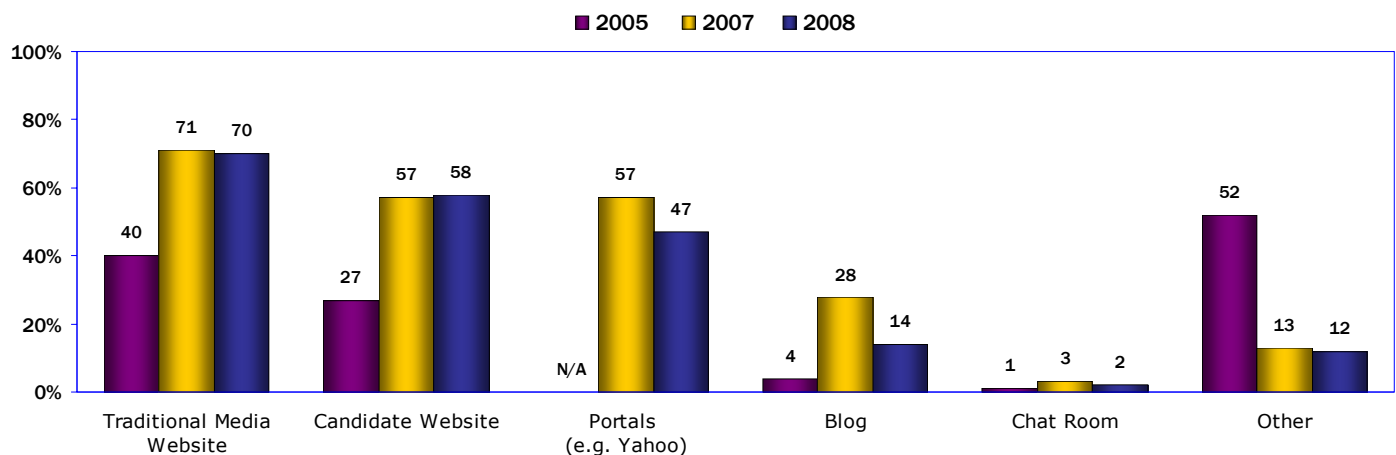


(Q297A M-1) (Note: This data was gathered before the 2008 presidential election.)

Location of Election-Related Information Online

Internet users used a variety of sources to find information about candidates, with 70 percent using the Web sites hosted by traditional media (such as nytimes.com), and lower percentages using candidates' Web sites and portals such as Yahoo.

Location of Election-Related Information Found by Internet Users
(Percentage of Adult Internet Users Who Gather Campaign Information Online)

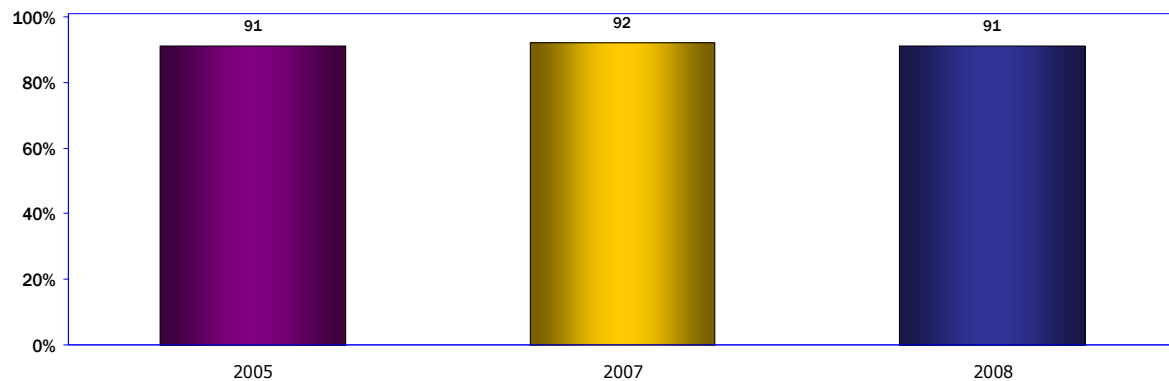


(Q297DD M-5)

The Internet and Gathering Information about Candidates and Issues

Among Internet users who go online for information-gathering during an election, 91 percent said they sought information about issues or candidates they supported -- a finding generally consistent across the three years this question has been asked.

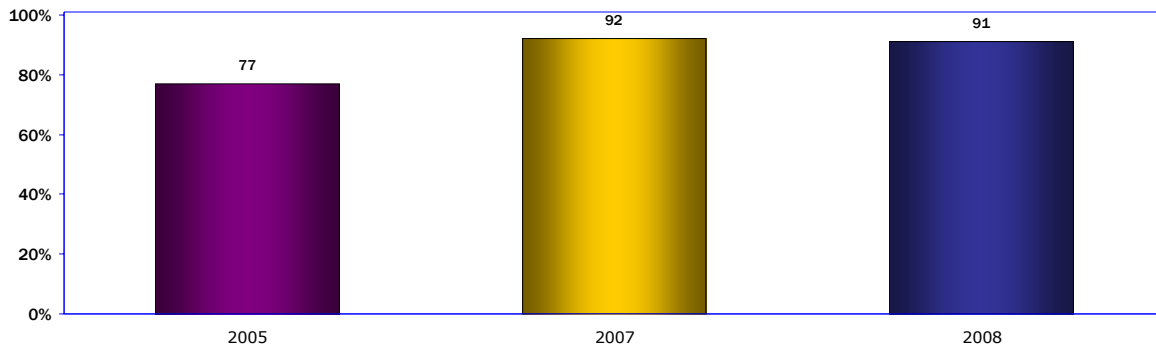
**When You Used the Internet to Gather Information
during the Last Significant Election in Your Area,
Did You Seek Information about Issues or Candidates You Supported?
(Percentage of Adult Internet Users Who Gather Campaign Information Online)**



(Q297AA M-2)

An equally-high percentage of users who went online for information during an election said they sought information on issues or candidates about which they were undecided.

**When You Used the Internet to Gather Information
during the Last Significant Election in Your Area,
Did You Seek Information about Issues or Candidates You Were Undecided?
(Percentage of Adult Internet Users Who Gather Campaign Information Online)**

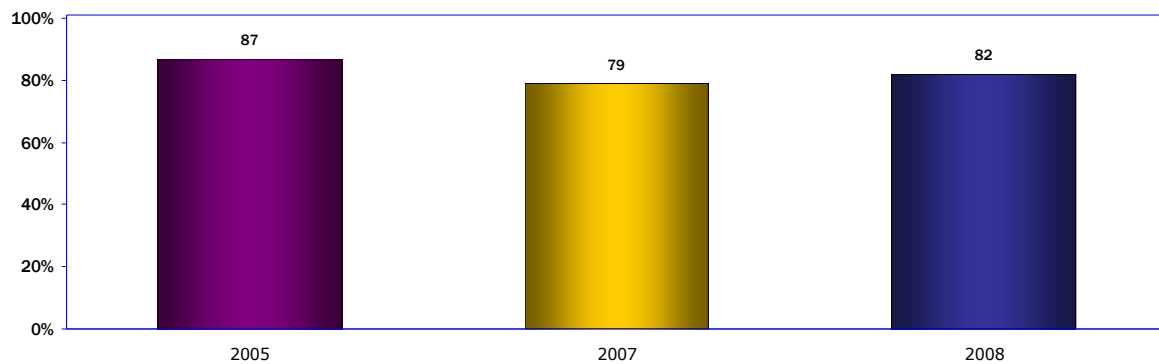


(Q297BB M-3)

Election Information Online: Satisfaction Levels

Eighty-two percent of users who went online to gather information were satisfied with the election-related information they found on the Internet -- a marginal increase over 2007 but slightly lower than the peak of 87 percent in 2005.

Were You Satisfied with the Election Information You Found on the Internet ?
(Percentage of Adult Internet Users Who Gather Campaign Information Online, Responding Yes)

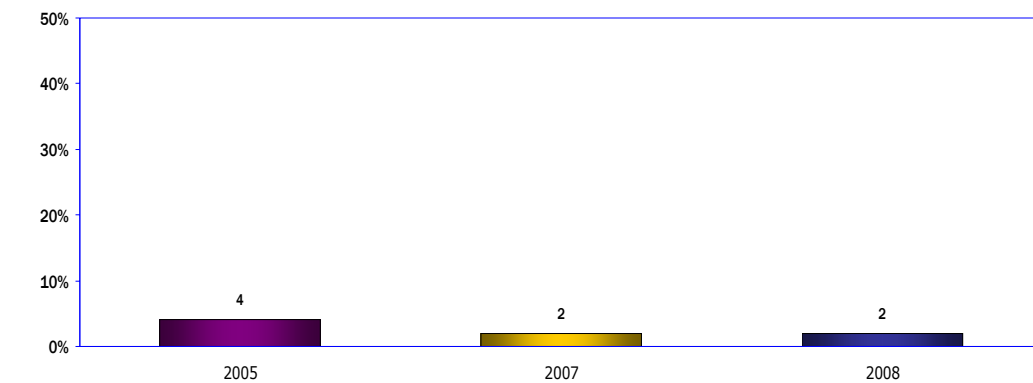


(Q297CC M-4)

Volunteering Online for Political Campaign Work

Two percent of Internet users said they volunteered over the Internet to work for a political candidate -- although small, that number represents the potential for millions of participants in the American political process (see the Trends section).

Did You Volunteer over the Internet to Work for a Candidate?
(Percentage of Adult Internet Users)



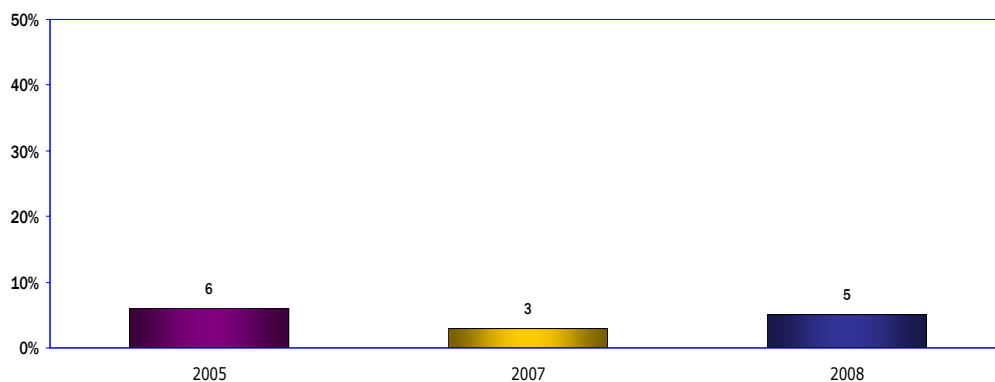
(Q297C M-7)

Campaign Contributions Online

Five percent of adult Internet users said they contributed money to a candidate through the Internet -- an increase over 2007 but a decline from 2006 when this question was first asked.

As a percentage of voters, this number is low. However, in actual numbers of Americans, this percentage represents more than 8.5 million people. Given the tremendous impact of online fundraising online during the 2008 presidential campaign, candidates have only begun to explore the potential implications for this type of money generation (see the Trends section on page 182.)

Did you contribute money to a candidate through the Internet?
(Percentage of Adult Internet Users)



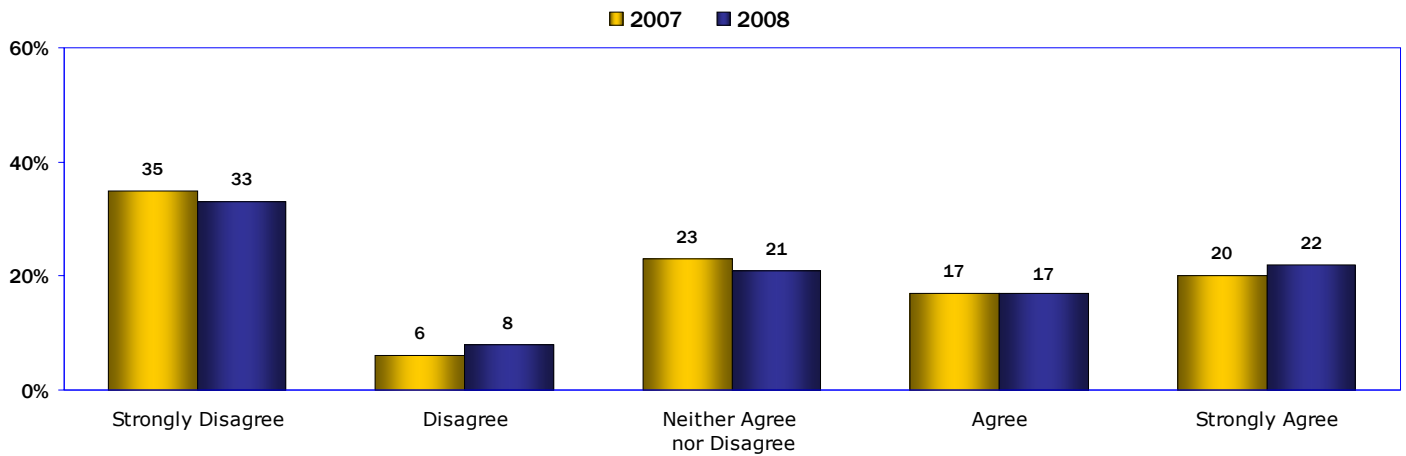
(Q297B M-6)

Voting Online

Do Americans think that the time has come to vote online? Slightly lower percentages of all respondents in the current Digital Future study (36 percent compared to 37 percent in 2007) agree or strongly agree that they would be interested in voting online.

However, an even larger percentage (41 percent) disagree or strongly disagree with the idea of voting online.

I Would Be Interested In Voting Online
(Percentage of Respondents Age 16 and Older)



(Q533 M-1)

The 2009 Digital Future Project: Trends and Issues

15 Years of Internet Use

Fifteen years of Internet use in America has changed virtually every aspect of life. In 2009, 80 percent of Americans go online (page 30). Internet users spend more than 17 hours per week online (page 33). A generation of children who in 1994 began to use the Internet in grade school will soon graduate from college. Connection to the Internet through a broadband connection is now the norm for most American households (page 48); nearly one-quarter of those households have at least three computers in them (page 40), and more than half of them have a laptop (page 41).

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

Here are several trends, issues, and questions worth watching that emerged in the 2009 study:

Number of Years Online: A Nation of Veteran Users

An impressive percentage of Americans are true Internet veterans: in the current study, more than two-thirds of users -- 67.9 percent -- have been going online for at least eight years (page 38).

With eight of 10 Americans using the Internet (page 30), this means that more than half of them (53 percent) have been going online for eight years or more; they are thoroughly experienced users for whom online technology has created a framework for communication, purchasing, and social contacts that has completely reshaped their lives.

Age and Internet Use

With the increase in average experience has come an increase in the percentage of older Americans who go online. In 2000, only 29 percent of Americans age 66 and older went online; this year, 40 percent of seniors go online. While the increase is not spectacularly large, it is nonetheless a significant increase in Internet use within an age range that conventional wisdom would suggest resists new technology.

The question of how the use of the Internet by a growing number of older American changes their behavior -- how it shapes their communications, their purchasing, and social connections -- will be a continuing issue to explore in the Digital Future Project.

The Internet at Work

Half of Internet users who go online at work said they go online sometimes or often for non-work related reasons, among them general Web surfing, chatting, instant messaging, and reading and writing e-mails. Only 15 percent of respondents who go online at work said they never go online for non-work purposes.

If going online at work for non-work purposes continues to grow, how will this trend affect work life and employee policies about Internet use in the office?

Internet Connection At Home: Modem, Broadband, Cell Phone

Internet access at home through a broadband connection is now the standard in America, with 80 percent of Internet users now going online through DSL, cable modem, ISDN, or (occasionally) a T1 or T3 line (page 48). Of particular note is that even a large percentage of light users -- those who go online 5 hours a week or less -- pay for a broadband connection.

The fact that a vast majority of Internet users are willing to spend \$20-\$75 a month for a fast, always-on Internet connection when they could log in through an existing (but slow) telephone line for free speaks volumes about the priority position that broadband access holds for a generation of Internet users.

Communication Technology: How Does It Affect The World?

While the percentage of users who said that communication technology makes the world a better place remains relatively high (58 percent), that number is well below the peak percentages in earlier years of the study (page 57). With all of the changes in communication, social networking, and purchasing that have evolved during 15 years of Internet use in America, the decline in positive views about online technology creates new opportunities for exploring how users perceive the role of the Internet in their lives.

Using Wi-Fi at Home: Where is it Used?

Internet users with a wireless connection by laptop at home -- where do they go online? With multiple responses possible, a large majority -- 64 percent -- said that they use their laptop with a wireless connection in the living room. Such a large percentage of wireless users going online in the living room reinforces the point that Internet access is not only an activity undertaken by most Americans, but it is also an activity that is physically central to everyday life in American households.

Reliability of Information Online: Views of Internet Users

Is information online generally reliable? A shrinking percentage of users think so. This year, 42 percent of Internet users said that most or all of the information online is reliable -- the lowest level thus far in the Digital Future Project (page 71). And 14 percent of users said only a small portion or *none* of the information online is reliable -- a high level in the Digital Future studies.

Fortunately, users have much more positive views about Web sites of government or established media (page 76). But the responses to questions about the reliability and accuracy of Internet pages overall tell a compelling story regarding perceptions about the quality of Web-based information.

Internet Non-Users: What Will They Do Next?

After 15 years of Internet use in the United States, the reasons why 20 percent of Americans do not go online are changing, and their long-term plans indicate that many will be part of a permanent class of non-users.

Consider that:

- Saying that the Internet is of “no interest” or “not useful” is now the most-cited reason for not going online (page 61).
- Internet drop-outs -- those who previously went online but are now non-users -- had plenty of time online to consider whether the Internet was useful to them: dropouts had used the Internet for an average of 3.3 years before stopping (page 60).
- Will non-users go online? Only 36 percent in the current study said they are likely to go online within the next year -- the lowest percentage in the eight years of the Digital Future studies (page 65).
- Less than half of Internet dropouts (48 percent) said they may someday go back online (page 66)

Much of the work undertaken by the Digital Future Project explores the benefits that users gain by going online. As communications, purchasing, and social networking shift increasingly toward the Internet, exploring the consequences that non-users suffer -- even as voluntary non-participants in online life -- will be a growing concern.

Newspapers: Are They Finished?

In a year when the woes of newspapers -- layoffs, consolidations, and outright closings -- are more extensive than in any period in memory, the best evidence of the changing nature of media use in America may be found in a single statistic: Internet users reported large increases in time reading online newspapers -- at 53 minutes per week, the highest level thus far in the seven Digital Future studies in which this question was asked (page 84). And, 22 percent of users said they stopped their subscription to a printed newspaper or magazine because they could access the same content while online (page 86).

Yet at the same time, Internet users also reported behavior that would seem to support the survival of print newspapers: 61 percent of users said they would miss the print edition of their newspaper if it was no longer available (page 86).

The most significant trend regarding newspapers might be found in comparing the use of online media by light users vs. heavy users (page 85). In sum, heavy users spent 65 more minutes per week reading online newspapers than do light users. This raises the question: how will the media habits of the current generation of light users change as online content continues to expand? What ramifications will these changes have for the newspapers of America?

Do You Click on Web Advertisements?

Online advertisers take note: a series of new questions in the current Digital Future Project shows that Internet users have strong negative views about advertising online -- as expressed by their views about it and their use of it.

In sum:

- More than half of Internet users (52 percent) said they never click on Web advertisements, and only six percent do so sometimes or often (page 118)
- Sixty-one percent of Internet users said they never buy products that they learned about from a Web advertisement (page 118).
- Only 12 percent of Internet users agreed with the statement, "I find Web advertising to be more informative than traditional advertising" (page 119)
- Seventy percent of users agreed or strongly agreed with the statement, "I find Web advertising annoying." (page 119)

The long-standing venues for advertising and marketing are changing dramatically: traditional newspaper advertising is dwindling, the price of television advertising is increasing, and marketers are looking increasingly to alternative forms of advertising -- in particular those that can be attached to specialized media that can reach targeted audiences, such as Web pages. At the same time, Web pages (especially those of newspapers) are looking to online advertising as their salvation. Clearly, some reappraisal of how Internet users can be attracted to online advertising is needed.

The Internet And Social Connections

Throughout the Digital Future studies, using the Internet has been viewed as a catalyst for social connection -- even long before the emergence of personal networking sites such as Facebook and MySpace. Now, after 15 years of Internet use in America, new trends are demonstrating both positive and negative aspects of the Internet's role in social relationships.

For example, 52 percent of users said the Internet was important or very important in helping them maintain their social relationships -- up from 45 percent in 2007 (page 129). However, 28 percent of users said the Internet has no importance at all in maintaining their social relationships.

Users reported that their number of online friends is declining (page 133), however the number of friends that users meet in person after initially meeting them online is growing (page 133); users said they met an average of 2.1 friends in person whom they originally met online -- a peak for the Digital Future Project.

Seventy-two percent of respondents said they spend the same face-to-face time with family in their household since going online, and the percentage who spend less time with family is declining (page 134). However, significant percentages of Internet users (44 percent) continue to say they were sometimes or often ignored because another member of the household spent too much time online (page 136).

The Internet and Political Change

And finally, after an election year in which the Internet often took center stage as a communications platform, several issues regarding the role of online technology in politics are particularly noteworthy:

While 37 percent of adult Internet users said they went online for political information, only five percent said they contributed money to a candidate through the Internet (page 180), and two percent said they volunteered over the Internet to work for a political candidate (page 180).

As percentages, these numbers are low. Nevertheless, these small percentages have major significance in grass-roots politics: as raw numbers of individual voters, they represent a profound shift in the nature of political campaigning, information distribution, and campaign fundraising.

For example, the “only” five percent of Internet users who said they contributed online actually equals more than 8.5 million Americans. How five percent of American Internet users created transformation in politics can be vividly seen in the campaign tactics of Barack Obama. The Obama campaign reported that more than three million people contributed money to the campaign -- and a large percentage of those donations came through the Internet. In little more than two weeks between October 15 and Election Day, the Obama campaign raised \$104 million -- most of it through online donations. Of the record \$750 million raised by the campaign, more than \$500 million came from the Internet.

Raising money is, of course, central to successful campaign planning. However, the role of the Internet in campaign victories has ramifications that extend far beyond its use as a cash generator. Obama’s campaign, as well as many others, created unprecedented levels of online communication -- e-mails, social networking sites, video downloads, and opportunities for volunteering or event planning. We are witnessing a new age of connection between candidates and their constituencies, as the transfer of unfiltered information -- information not managed by media gatekeepers -- shifts increasingly toward online delivery.

For example, Obama fan groups on Facebook totaled 3.2 million supporters. The social networking page MyBarackObama.com housed more than one million members and 35,000 volunteer groups. During the campaign millions received regular text messages -- often as many as 20 per month. When Obama announced Joseph Biden as his running mate, campaign participants found out by e-mail at the same time the major media of the world were informed.

Those connections have continued post-election as the new President continues to reach out to the American people through the Internet. The new White House home page created by the Obama administration is considered a model of transparency and clarity in its presentation of information about policies and presidential agendas.

Obama’s success as the first “Internet President” is, of course, the most successful demonstration of using the broad spectrum of online technology in political campaigning. But the Internet has assumed a compelling role in the campaigns of both political parties -- and independent candidates as well. Our exploration of the Internet’s impact on politics in America is just beginning.

Supplement I

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, and Oceania. The first comparative results from the World Internet Project were released in January 2004. The first comprehensive International Report of the World Internet Project was released at the end of 2008.

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

ARC Centre of Excellence for Creative Industries and Innovation (CCI)
Institute for Social Research
Swinburne University of Technology
<http://www.cci.edu.au/projects/digital-futures>

Bolivia

Universidad NUR
www.nur.edu

Canada

Canadian Internet Project (CIP)/
Recherche Internet Canada (RIC)
<http://www.ciponline.ca>

Chile

Pontifica Universidad Catolica de Chile
School of Communications
www.wipchile.cl

China

Chinese Academy of Social Sciences
www.wipchina.org/en

Columbia

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

Czech Republic

Masaryk University Brno
Faculty of Social Sciences
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 Information Society
and Network Research Center
www.ithaka.hu

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
www.soc.toyo.ac.jp/~mikami/wip/en/index.html

Macao

University of Macau
www.umac.mo

Mexico

Tecnologico de Monterrey
<http://www.proyectointernet.org>

New Zealand

Institute of Culture, Discourse and Communication
AUT University
www.wipnz.aut.ac.nz

Portugal

LINI (Lisbon Internet and Networks Internacional Research Programme)
<http://www.lini-research.org>

Russia

Analytical Center, Video International
<http://www.vi.ru/index.aspx?lang=ENG>

Singapore

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

South Korea

Yonsei University
www.yonsei.ac.kr

Spain

Internet Interdisciplinary Institute (IN3)
Open University of Catalonia (UOC)
www.uoc.edu/in3/pic/eng/communication.html

Sweden

World Internet Institute
www.wii.se

United Arab Emirates

American University of Sharjah
Department of Mass Communication
<http://www.aus.ed>

Supplement 3

Research methods

For both the original sample drawn in 2000, and the replacement samples selected in subsequent years until 2006, 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.

Interviews were conducted in English. Interviewing took place between April 9th and June 30th. The final sample size was 2030.

In years 2000 to 2007, once the selection of a household member was made, only that individual was eligible to complete the interview. In 2008, if the household member who was originally selected to complete the interview was not available, one of up to two other individuals randomly selected from the roster could be selected to represent the household in the survey. If both of the randomly selected individuals were not available, the individual on the phone was interviewed.

In 2008, ten call attempts were made to complete an interview. If a household refused once, it was not contacted again.

The data were collected through a combination of telephone and web surveys.

In 2008, those repeat respondents and new random respondents who indicated by phone that they had Internet access were directed to complete the interview via the Web. They were verbally directed to a URL, and a web link and password were e-mailed to the potential respondents to allow them to complete the survey via the Web. Respondents who were not willing to give an e-mail address were not included in the study. A small number of respondents who indicated that they had Internet access but preferred to complete the survey over the phone were allowed to do so.

In 2008, when contacting panel members from the original sample, up to 13 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.

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

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 eight 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 the 2000 U.S. Census results occurred in the race category where the weighted total sample had 12 percent more whites and 8% less blacks than the national average. All other deviations were less than 3 percent from Census values.

The data for the calculations was in most cases calculated to at least eight decimal places, and were then rounded to tenths. As a result, some totals may not add up to precisely 100 percent.

Please note that race/ethnicity was calculated as "race first mentioned" in 2007. Since this study was administered online, we could not determine which race was mentioned first so we calculated race as one of the following to compare against the breaks used in the 2000 US Census.

	<i>2000 US Census</i>	<i>Final Total</i>	
<i>White alone</i>	74%	86%	+12
<i>Black or African American alone</i>	12%	4%	-8
<i>American Indian and Alaska Native alone</i>	1%	1%	0
<i>Asian alone/Pacific Islander alone</i>	4%	1%	-3
<i>Native Hawaiian and Other Pacific Islander alone</i>	0%	0%	0
<i>Some other race alone</i>	6%	5%	-1
<i>Two races including Some other race</i>	0%	0%	
<i>Two races excluding Some other race, and three or more races</i>	2%	3%	

* * * * *

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