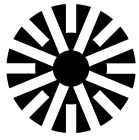




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REPORT | **DECEMBER 16, 1996**



NEWS ATTRACTS MOST INTERNET USERS

Online Use

The Pew Research Center survey of 1,003 online users in October 1996 shows slow but steady growth in this activity. Online users are going online at slightly higher rates than was the case some 16 months ago. Their motivations and their behavior have changed somewhat. More are going online for pleasure, and more are seeking information about finances, travel and entertainment.

The biggest and perhaps most significant change over the last year is the increased use of the World Wide Web. Nearly three-out-of-four (73%) report having used the Web, compared to only 21% in 1995. Web use appears to be frequent: 51% said they used the Web either yesterday or sometime in the past week vs. 12% last year.

The means by which Americans go online has also changed significantly in a year's time. Twice as many people subscribe to an Internet access provider compared to June of 1995. As a consequence, subscriptions to some of the major commercial online services have fallen off. The exception is America Online which has continued to attract new subscribers.

Online Use Increases

The online population has grown substantially over the last year. In June 1995, 14% of the general public said they went online either from work, school or home. By September 1996 that number had climbed to 22%. The percent of Americans turning to online sources for news about current events, public issues and politics has remained relatively constant over the last year. During the 1996 Presidential campaign, approximately 4% of the public went online specifically for news about the upcoming election. The number of people doing so did not increase markedly as election day drew near.

	1995		----- 1996 -----				Early Sept %
	June %	Jan %	Feb %	March %	April %	July %	
Total	14	21	21	22	20	22	22
Goes Online for...							
Current events/ political news	n/a	11	11	14	10	13	12
Presidential election news	n/a	n/a	4	4	3	3	5

Online users are different in important ways from the general public. They are younger, more affluent and better educated. Some 37% of online users are under the age of 30, compared to only 22% of the general public. Nearly four-in-ten (38%) make over \$50,000 a year, compared to 22% of the public. And nearly twice as many were graduated from college (39% vs. 21% of the general public).

A significant gender gap exists among online users. Men make up a disproportionate share of this population: 58% vs. 42% women.

Online use is more a suburban than a rural activity. Nearly one third of online users (31%) live in the suburbs, only 14% are from rural areas.

Demographic Profile Of Online Users*		
	Total Pop. %	Online Pop. %
Gender		
Male	48	58
Female	52	42
Race		
White	85	86
Non-white	14	14
Black	10	9
Age		
18-24	12	23
25-29	10	14
30-49	42	51
50+	35	11
Income		
\$75,000 +	10	19
\$50,000 - \$74,999	12	19
\$30,000 - \$49,999	25	28
\$20,000 - \$29,999	17	12
Less than \$20,000	23	13
Education		
College Grad	21	39
Some College	23	30
High School or Less	56	30
Region		
East	20	23
Midwest	25	20
South	34	32
West	21	25
Community Size		
Large City	20	22
Suburb	23	31
Small City/Town	35	32
Rural	21	14

* Based on 4,475 interviews/1,082 online users.

Politically, online users tend to be slightly more Republican than the public at large. However, when compared to a demographically balanced sample of the public, online users are nearly indistinguishable in terms of their party identification and basic political preferences.

[NOTE:For this analysis, a sample of the public was weighted to match the age, sex and educational distribution of the online population. Comparisons were then made between the political attitudes of this matched sample and the online population.]

Online users are about as interested in politics as most Americans but are substantially more knowledgeable. Some 71% were able to identify Bob Dole as the candidate who called for a 15% across-the-board tax cut. A much smaller percentage (59%) of the general public could do so. A majority (55%) of online users correctly linked Bill Clinton to the phrase “bridge to the future,” compared to 38% of the public at large.

Political Profile Of Online Users*			
	Total Pop. %	Wtd. Pop.+ %	Online Pop. %
Party ID			
Republican	29	31	34
Democrat	33	31	28
Independent	32	35	36
1996 Pres Pref#			
Clinton	49	48	47
Dole	34	36	38
Perot	11	12	12
1996 Cong Pref#			
Republican	44	46	50
Democrat	49	48	47

* Based on 2,724 interviews/690 online users conducted July, Sept 1996.
+ Demographically balanced sample (see footnote on previous page).
Among registered voters.

New Users

New online users, defined here as those who started going online in the last six months, differ in important ways from those who have been going online for a year or more. They go online less frequently than more experienced users. Only 17% of new users report going online everyday, compared to 31% of those who started going online two to three years ago, and 47% of those who have been online for more than three years.

New users more often go online solely for pleasure and are more apt to spend time browsing than looking for specific information. New users spend less time exploring the World Wide Web: 38% have never used the Web compared to only 18% of those who have been online at least two years. Similarly nearly half (49%) of those who started going online more than three years ago report having used the Web yesterday, compared to only 15% of those who began going online within the last six months.

Familiarity Breeds... Contentment

Compared with online users interviewed in 1995, today's users are only slightly more likely to say they would miss going online "a lot" or "some" if they could no longer do it. But the influx of new users into the online population masks the growing attachment to online use felt by many veteran users.

Among users who said they began going online within the last six months, only 24% would miss going online a lot, and 39% would miss it some. But among those who began going online two to three years ago, 40% would miss it a lot. And among those who began over three years ago, a majority (55%) would miss going online a lot. Only 15% of these veteran users said they would miss it "not much" or "not at all." Of online users interviewed in 1995 who said they would miss going online not at all, only 21% still feel that way.

Of the previous online users contacted for this survey, 197 said they no longer go online. These respondents were not interviewed as part of the online sample, however, they were asked why they have stopped going online. Many said they stopped because they no longer have access to the Internet. But a significant number have stopped voluntarily, saying they no longer have a use for the Internet or any interest in going online.

Top Reasons Why Some Previous Online Users No Longer Go Online*

1. No longer have access to the Internet
2. Too busy/No time
3. No longer have a use for or interest in going online
4. Costs too much/Financial constraints
5. Have only stopped temporarily

* Based on 197 respondents who no longer go online.

More Frequent Online Activity

The frequency of online use has increased marginally since 1995. Then, 20% of online users said they went online everyday and 32% said they went online yesterday. Today 25% go online everyday, and 38% reported going online yesterday. The increase has come primarily in home use. Of those who went online yesterday, 26% said they did so from home, up from 19% in 1995.

[NOTE: 1995 trends refer specifically to online users who subscribe to an online service.] Just as men are more likely to go online than women, they also go online more often: 59% at least three days per week, compared to 47% of women. Men over 50 are the most frequent online users; nearly half (47%) report going online everyday, and over 70% go online at least three days per week. Women under 30 are less likely than any other gender-age group to report going online everyday (14%).

Online users who do not have children living at home go online more often than those with children. Self-employed online users are much more likely than others to go online everyday. The route by which online users access the Internet seems to affect how often they go online. More than a third (35%) of those who use an Internet access provider go online everyday, compared to 24% who use a commercial online service.

Attitudes toward information available on the Internet do not bear any significant relationship to frequency of use. Online users who said a lot of what you find on the Internet cannot be believed go online as often as those who think you are more likely to find accurate information about what is going on in the world on the Internet than in the daily newspapers or on the network news.

Older Users Online From Home

Home is the most popular online venue (68%), followed by work (47%) and school (16%).

Older online users (those 50 and over) are much more likely than younger users to go online from home (75% vs. 59% of those under 30). Online users in their mid- to late-twenties are more likely than others to go online from work (59%). Far fewer (26%) of slightly younger users (18-24 years old) said they go online from work. This is likely related to the fact that a significant percentage (21%) of those age 18 to 24 do not work.

Nearly one-in-four (24%) online users go online from both work and home. These are mostly college educated, middle-aged men with high incomes, affording them the luxury of a home computer. Longtime Internet users are also highly likely to report going online from these two locations.

AOL And Direct Access Providers Now Dominate

The vehicles used to go online have changed significantly over the last year. America Online has emerged as the dominant commercial online service, and many users are bypassing commercial services altogether in favor of Internet access providers.

Last year, a plurality of online users subscribed to one of the three major commercial services, America Online, CompuServe or Prodigy, and they divided fairly equally among them. At that time, less than one-in-ten subscribed to an Internet access provider. Today, America Online has clearly overtaken the other commercial online services. Nearly three-in-ten (29%) online users personally subscribe to AOL, up from 20% in 1995. CompuServe has dropped to 7% (from 14% in 1995), and Prodigy is down to 6% (from 15%). Picking up the slack are Internet access providers, subscribed to by nearly 20% of online users.

Despite the growth of these various vehicles, a substantial percentage of online users — 40% — still do not personally subscribe to any commercial services or Internet access providers. More than half of those under the age of 30, as well as those with incomes of less than \$30,000 a year, fall into this category. Those who go online primarily from work are much more likely than those who go online primarily from home to be non-subscribers (63% vs. 17%). Many of the former take advantage of direct Internet connections available at their workplace. Along the same lines, fully two-thirds of those who go online strictly for work, rather than for pleasure, subscribe to neither an online service nor an Internet access provider.

Men over 50 are more likely than any other major demographic group to subscribe to America Online; 41% said they subscribe. AOL is also more popular among high income users than those with lower incomes, and it is used more by Easterners (35%) than by those living in the Midwest (28%) or the South (24%). Users from households with children are more likely to subscribe to AOL than those in childless homes (34% vs. 26%). Those who go online from home and those who go online mostly for pleasure subscribe to AOL at high rates (41% and 40%, respectively).

Internet access providers are used most by college-educated men and users with higher than average incomes. Self-employed and longtime users also subscribe to these providers at higher rates than do others.

The most commonly used modems have a speed of 28,800 baud; 28% of online users report having such modems. The next most popular speed is 14,400. Only 7% of online users are now using a modem with a speed of 9,600 or less. Most online users are satisfied with the speed of their modems (32% very, 47% somewhat).

Less Work, More Play

Motivations for going online have changed significantly over the last year or so. Far fewer people are now going online strictly for work-related activities. More are also going on for pleasure. The majority of users (67%) described their online activity as a mix of work and pleasure. Only 14% said they go online solely for work purposes, down from 31% in 1995. The percentage who said they go online only for pleasure is unchanged at 19%.

The growth in the percentage of users going online for both work and pleasure is not simply a result of the kinds of people who have joined the online population since 1995. Among online users interviewed in 1995 who went online for work or for pleasure, half now do both.

[NOTE: Of the 1,003 online users interviewed for this survey, 194 were previously interviewed as part of the Times Mirror Center's June 1995 Technology survey.]

Men and women have somewhat different motives for going online. Men cite a mix of work and pleasure more often than women (70% vs. 62%). Women go online solely for pleasure more often than men (23% vs. 16%). Young users show more versatility than older ones: 73% of those under 30 go online for a mix of work-related activities and pleasure, compared to only 56% of those over 50.

Those who use Internet access providers or a direct Internet connection at work or school are less likely than those who use a commercial online service to go online strictly for pleasure. Direct connections are used more often for work than for pleasure.

Less Browsing

For the most part, online users go onto the Internet looking for specific information rather than simply to browse. More than two-thirds (67%) said they are usually looking for something specific, only 20% said they are usually just browsing, and another 12% volunteered that they do some of both. Browsing is more prevalent among younger users (18 to 24 year olds). Fully a third of them spend their time "surfing the net." This compares with only 18% of those over 50. Browsing is also reported more among new online users

(those who just started going online in the past six months) than those with more experience.

Motivation bears some relation to behavior, as very few (9%) of those who go online strictly for work-related activities spend their time browsing. This compares with 38% of those who go online just for fun.

Maturing Market Behavior

A panel re-interview analysis finds users have changed their attitudes toward going online, as well as their online behavior. The nearly 200 online users first questioned in 1995 are now going online with more frequency, they are more often going online for a mix of work and pleasure, and they are using e-mail and the World Wide Web more often.

[NOTE: “The nearly 200 online users” refers to the 194 online users interviewed in both 1995 and 1996.]

The last year has seen a marked increase among all online users in certain specific online activities. The largest increase has been among those who go online to get entertainment-related information: 30% said they do this at least weekly, up from 19% in 1995. Use of the Internet for financial information has also increased substantially. Some 22% now go online weekly to get financial information such as stock quotes or corporate information or to buy stocks or bonds, compared to 14% in 1995. The number of users seeking travel information or services has also increased somewhat.

Overall the most popular online activities are doing research for work or school (56% engage in this at least weekly); getting news and information on current events, public issues or politics (39% weekly); getting information on entertainment-related activities such as hobbies, movies and restaurants (30%); participating in online forums and chat groups (23%); and seeking financial information (22%).

Online Activities	
	% Who do Each at Least Weekly
Research for work or school	56
News and info. on current events	39
Entertainment-related activities	30
Online forums and chat groups	23
Financial information	22
Games	11
Travel information	10

While men engage in most of these activities more often than women (seeking travel information and doing research for school are the only exceptions), the biggest gender gaps are on financial information, news on current events, and information about entertainment-related activities.

Young online users (under 30) more often participate in online forums and chat groups and seek information about entertainment activities. Older online users (50+) are more frequent consumers of news and financial information.

College graduates utilize the Internet to a greater degree than those without a college education for work-related research, news and financial information.

One online activity that has increased dramatically over the last year is use of the World Wide Web. Nearly three-out-of-four (73%) online users have used the Web at some time, up from a mere 21% in June 1995. Nearly 25% said they used the Web yesterday, and another 28% used it in the past week.

The increase in Web use has been across the board. Men and women have increased their use at about equal rates. Usage among all age groups has risen, with older online users showing slightly higher rates of increase. The same is true among all education levels. Those with higher incomes have increased their usage at a higher rate than those with incomes below \$30,000 per year.

The greatest disparities in Web use appear linked to sex and education. College-educated men under the age of 50 are more likely than any other group to have used the Web; only 16% have never done so. Non-college educated women over the age of 30, on the other hand, show the lowest level of Web use; fully 41% have never used the Web.

Use of the World Wide Web 1995 vs. 1996			
Online Users Who Ever Use the Web			
		1995	1996
		%	%
Total		21	73
Gender			
	Men	26	79
	Women	13	64
Race			
	White	22	73
	Non-white	17	70
Age			
	Under 30	25	77
	30-49	21	71
	50+	13	71
Education			
	College Grad	28	77
	Some College	19	72
	H.S. or less	11	67
Income			
	\$50,000+	21	76
	\$30,000-49,999	23	73
	Less than \$30,000	19	67

Those who go online using an Internet access provider more often report frequent use of the Web. Four-in-ten said they used the Web yesterday compared to 32% of those who used a direct Internet connection, and only 22% of those who use a commercial online service. Nevertheless, commercial online services have become the most popular vehicles for accessing the Web. Some 44% of those who use the Web do so via a commercial service, 35% use a work or school connection, and 28% use a direct dialup service.

E-Mail

E-mail use has increased significantly over the last year. Today, 77% of online users send or receive e-mail at least once every few weeks, up from 65% in 1995. About one-in-four (26%) use e-mail everyday, another 19% use it three to five days a week. Half of all e-mail users check their e-mail at least once a day. This is unchanged from 1995. On average e-mailers send six messages a day and receive twelve to thirteen.

Among online users in 1995 who never used e-mail, over half are now doing so on at least an occasional basis. Twenty-seven percent of former non-users are now using e-mail at least three days a week. Overall, 47% of online users who were re-interviewed reported using e-mail more frequently now than in 1995.

[NOTE: "Online users in 1995" refers to the 194 online users interviewed in both 1995 and

Maturing E-Mail Users*				
	----- Used E-Mail in 1995 -----			
	Total %	At least 3 days a week %	Less than 3 days a week %	Never %
Uses E-Mail in 1996				
At least 3 days a week	55	80	44	27
Less than 3 days a week	32	18	47	38
Never	13	2	9	35
	100	100	100	100

* Based on 194 users from '95 & '96.

1996.]

Media Habits of Online users

Though online use has increased over the past year, this has not much affected consumption of traditional media by online users. Today's online users are as likely to say they read a daily newspaper regularly as were online users in 1995. They are also just as likely to consume TV and radio news. Interestingly, while equal percentages of online users reported reading a daily newspaper regularly, fewer said they read the paper yesterday (55% vs. 63% in 1995), and among those who did read the paper yesterday, fewer reported spending more than 30 minutes doing so (30% vs. 37% in 1995).

The most frequent online users — those who go online every day — are more likely than less frequent users to say they do not read a newspaper regularly (35% vs. 25% of all others). However, frequency of online use does not seem to be related to TV and radio news consumption.

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