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CCi Digital Futures 2010

The Internet in Australia

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ARC Centre of Excellence for Creative Industries and Innovation

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Preface

This report presents findings from the second survey of the Australian component of the World Internet Project. This survey is a project of the ARC Centre of Excellence for Creative Industries and Innovation at the Institute for Social Research, Swinburne University of Technology.

This report provides an overview of the study, presenting a broad picture of the Internet in Australia, with comparisons to our earlier 2007 study, and to the international findings of our partners in the World Internet Project. At the end of each section we have added some further analysis, examining an aspect of the Australian data in more detail and providing some international context using results from the 2008 findings of our international research partners.

We will be publishing further work examining in more detail issues such as the differences that age, gender and education make to people's use of the internet.

Acknowledgements

Research for this project was supported by the Australian Research Council Centre of Excellence for Creative Industries and Innovation (ARC Grant no. CE0561908).

We would like to thank our colleagues in the ARC Centre. We are fortunate to have such a challenging and ambitious cross-disciplinary home for this project. Special thanks also to our colleagues in the World Internet Project, who have done so much of the hard work in this field already; and to our colleagues at the Institute for Social Research.

We would like to thank Tristan Berrell for his data analysis and presentation. Finally, for all her expert assistance with the administration of the survey, we would like to thank Gordana Bruce and her staff at Swinburne's Faculty of Life and Social Sciences CATI Centre.

Highlights

Most Australians are internet users...

The overwhelming majority of Australians are internet users. When we talked to them, four in five Australians had used the internet in the past three months, up from 72.6% in 2007. By international standards Australia's level of internet use is very high. In terms of home access, the vast majority of connections are now broadband (94.2%).

Internet use still varies between different groups although these differences have lessened since 2007. Students, employed persons, younger people, higher educated and higher income individuals are all more likely to use the internet than retired people, home-makers, older people, lower educated and lower income individuals.

... but there is still a digital divide.

Slightly more than an eighth of the population has never used the internet, while just fewer than six percent of Australians are ex-users. Ex-users and non-users have different reasons for not using the internet. Ex-users are more likely to cite being too busy or not having a computer or internet connection while non-users are more likely to say they are confused by the technology or have no interest in the internet. Although broadband is growing quickly just under a quarter of Australians do not have broadband access at home.

The internet in Australia is maturing and broadband is still growing

The internet is a maturing technology in Australia. A third of internet users have been online for more than ten years while a further half have been online for five years or more. A very small proportion of users had taken up use in the past year. On average men have been online 19 months longer than women.

Broadband access however, is still in a take-up phase, with new users coming mostly from non-connected households. In 2007, just under four in five households with internet access had a broadband connection, by 2005 this had increased to just under 95%.

The internet is becoming increasingly integral to Australians' lives

Well over half of our sample of internet users describe the internet as 'very important' to their current way of life while almost three in ten say that it is 'important'. Three-quarters of users feel that the internet makes life easier while more than 9 in 10 say that it is a fast and efficient means to gain information.

Internet use is increasing

Across almost all activities that we asked about, there was an increase in the proportion of people undertaking the activity as well as an increase in frequency. When combined with the 10% increase in the number of people using the internet, this represents a large increase in overall internet use in the last two years.

The internet is an important way for people to keep in touch.

Overall internet use has increased the time people spend communicating with friends and family and this effect has strengthened in the last two years. This impact of the internet is particularly strong in Australia which recorded the highest levels of increased contact with both friends and families amongst our comparison countries.

On the other hand, for a significant proportion of people their internet use has resulted in less time spent *face-to-face* with household members but this effect has not changed in the last two years.

Email is the most popular means for communicating online and its use has grown in the last two years. More than 8 in 10 Australians check their email at least once a day. Instant messaging is also a popular and growing communications tool with more than a quarter messaging daily. There was strong growth in the use of the internet to make telephone calls with almost 3 in 10 now doing this and those born overseas recording even higher levels underlining the importance of internet as a communications tool.

The internet changes media use.

The internet is now users' most important source of information and its importance has increased slightly in the last two years. This is a global phenomenon- in all but one of our comparison countries the internet was now users' most important source of information.

Just under three-quarters of Australian users described the internet as 'important' or 'very important' compared to just under 40% for television and just over 40% for newspapers or radio. Around 7 in 10 users would visit an online news service if either a large international or large local story was breaking.

Television watching is the media-related activity most affected by internet use. Four in ten users say they watch less television since going online and this impact is strongly related to age. Nearly half of those aged 18-24 watch less television since access compared to only 14% of those aged 65 or more. Overall less than a quarter of internet users feel they read newspapers or books less often since gaining internet access.

The question of whether Internet users are prepared to pay for journalism is now topical, with many commentators foreseeing the demise of newspapers. We asked respondents whether and how much they would be prepared to pay to read an online newspaper. Nearly three quarters of Australians say they would not consider paying (71.4%). Just 7.2% would pay the current price of a printed newspaper (\$1.50).

The internet enables creativity.

The proportion of users posting pictures or photographs increased dramatically from 25 to 46 per cent from 2007 to 2009, and the proportion of people posting video also more than doubled. Despite this, a smaller proportion of users in 2009 than 2007 felt that their internet use had enabled them to share both creative work they liked with others, and to share their own creative work. The proportion of users who agreed that the internet had encouraged them to produce their own creative work did not change significantly over the two year period.

The internet is a major source of entertainment.

The internet is an increasingly important source of entertainment, and is now challenging television as Australians' most important entertainment medium. In 2009 a higher proportion of users described the internet as a 'very important' source of entertainment than television. (Although if we look at sources of entertainment considered 'important' as well as 'very important', television moves ahead of the Net.) We would expect that as broadband access improves in both speed and coverage that entertainment uses of the Internet will evolve further, and grow in significance.

Downloading or listening to music online, surfing or browsing the web, finding out information about food such as recipes, looking for information about restaurants and visiting sites dedicated to particular artists are the most popular entertainment-related internet activities — all of these activities recorded significant growth between 2007 and 2009.

While downloading content increased in the last two years internet users were more likely to access their movies and music off-line than online. Even in terms of digital music, users are more likely to copy their own or a friend's CD than to buy online. Relative to our comparison countries Australia is around mid-level in terms of downloading or watching video content online. Preparedness to do this is heavily related to age, six in ten young Australians were downloading or watching video content online at least weekly compared to only 1% of those aged 65 or more.

Australians' preparedness to substitute digital for hard copy content does not appear to have increased in the last two years. Half of our internet users would not consider downloading music or movies instead of buying hard copy at any price. Only around one in twenty users would be prepared to pay a price comparable to an offline version.

The internet changes politics.

The proportion of users who agreed that the internet has become important for the political campaign process increased markedly in the last two years (45.6% to 58.3%) while non-user agreement increased even more (35.8% to 57.2%).

In 2007 non-users were more sceptical than users about the internet's capacity to empower citizens. Perhaps more importantly, a sizeable proportion of non-users simply didn't know what impact the internet was having on politics. In 2009 the differences between users and non-users on this question decreased and non-users were less likely to answer 'don't know'.

Internationally Australia is amongst the more sceptical countries in terms of our attitude to whether internet use can help people have a greater say in what governments do.

Most Australians support internet regulation and the NBN

The majority of Australians do not think that the internet is over-regulated. Just over four in ten think that the current amount of regulation is about right. A further four in ten would like more regulation. There is very strong support for restricting children's access to the internet. An overwhelming 82.8% felt there should be some restrictions but almost all of these people felt that responsibility should be shared by parents, schools, government and internet service providers.

Just under three-quarters of Australians think the development of Labor's National Broadband Network is a good idea. Support for the NBN is slightly stronger amongst younger people and more strongly supported by internet users than non-users.

People shop online, with reservations.

Australia had the highest level of both looking for information about goods and services online and purchasing online of our comparison countries.

In 2007 less than half of our sample of internet users purchased at least one product a month. By 2009, this had increased to two-thirds. Those who used the internet for purchases spent on average \$200 per month online (the median amount spent was \$100). Older Australians are less likely to purchase goods online.

Almost 9 in 10 users research products online. Making travel bookings (76.1%), paying bills (71.6%), banking (75.0%) and purchasing event tickets (65.1%) were all popular online activities.

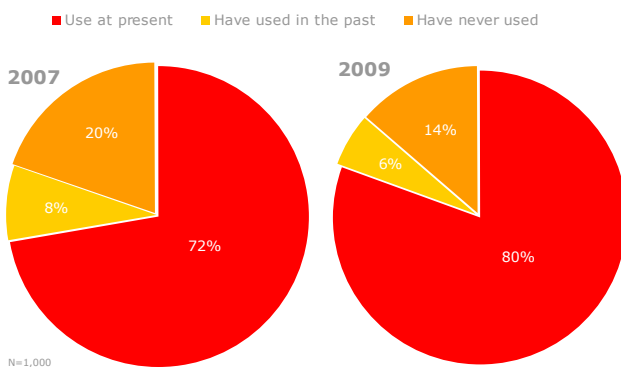
While a majority of users are concerned about credit card security online, fewer report being 'very' or 'extremely concerned'. Privacy concerns involved with e-commerce have stayed around the same level.

1 The basics of Internet access

This report presents findings from the second survey undertaken by the Australian component of the World Internet Project. This survey is a major piece of research undertaken by the ARC Centre of Excellence for Creative Industries & Innovation at Swinburne's Institute for Social Research.

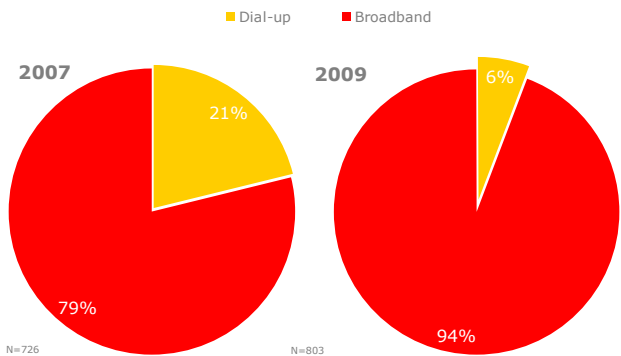
According to the ABS, in November 1998 just under one in five Australian households had access to the internet. This proportion had almost doubled two years later and has continued to climb steadily. In our survey undertaken in 2009 we found that just over 80% of Australian households had internet access.

This section investigates who uses the internet and who doesn't. Since the popularisation of the internet and the advent of the world wide web there has been considerable public policy interest in this issue. As the technology has matured and adoption deepened, interest has focused on where people access the net and the type of access they have.



1.1 Current Users and Non-Users

In 2009, eight out of ten Australians said that they currently used the internet, up from 72.6% in 2007. Only 13.5% of our respondents had never used the internet (just under 20% in 2007), while the proportion of ex-users had also fallen.



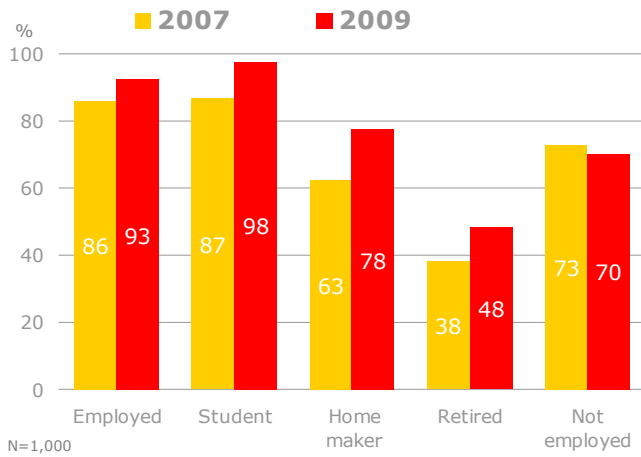
1.2 Connection Type in the Household

Four in five Australian households have internet access (81.4%). Of these the vast majority are broadband connections (94.2%).¹ We have now reached the stage where dial-up access is a marginal form of access. In developing sites and applications for the web dial-up access is unlikely to be a consideration, increasing the disadvantage faced by users with such a connection.

¹ For the purposes of this report broadband is defined as any connection that is not dial-up.

Digital Divides: Users and Non-users

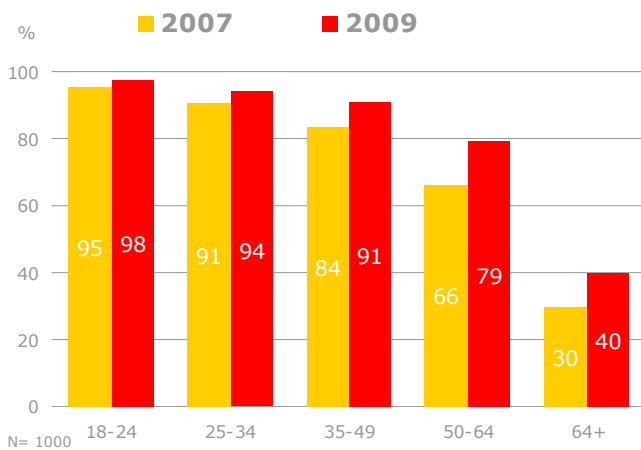
One of the most basic questions about the internet through its development phase has been who is using and who is not? While a substantial minority of the population are still non-users, the relevance of this question remains. This section examines the characteristics of the two groups.



1.3 Use by Lifestyle

Lifestage is one aspect that influences internet use. The vast majority of the employed population (93%) and students (98%) use the internet indicating that computer and internet skills have become essential for people's professional lives.

Just under a quarter (22.4%) of homemakers and primary carers have not used the internet during the last three months while 29.7% of unemployed people are non-users or ex-users of the internet. Finally, retired people have the lowest user rate of 48% (up from 38% in 2007).

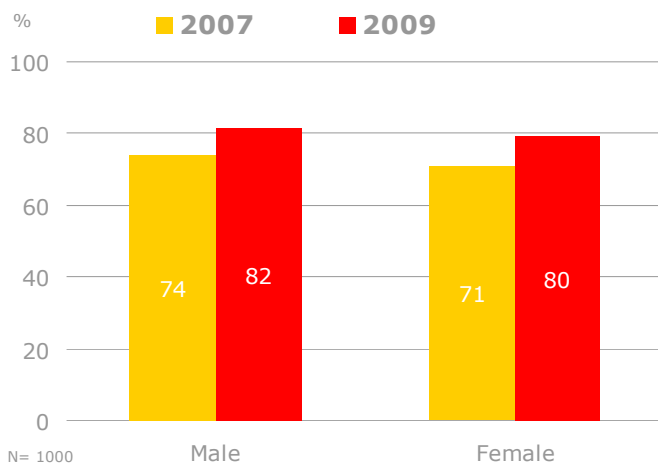


1.4 Use by Age

Another factor that has an effect on internet use is age. The likelihood that Australians use the internet on a regular basis decreases gradually with increasing age.

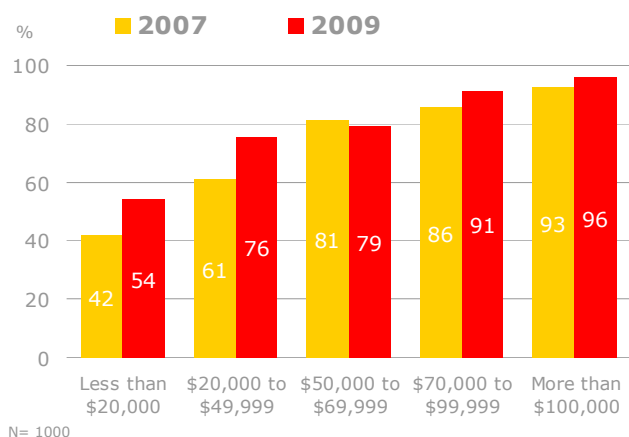
Almost all of our youngest respondents (18 to 24) are on-line (97.5%), as are 94.3% of 25 to 34 years old, and still the great majority of Australians in their mid-thirties to end-forties (90.8%).

The older age groups experienced the most growth in usage rates between 2007 and 2009 with the 50-64 group going from 66.1% to 79.2% and those aged 65 or over up from 29.8% to 40.0%.



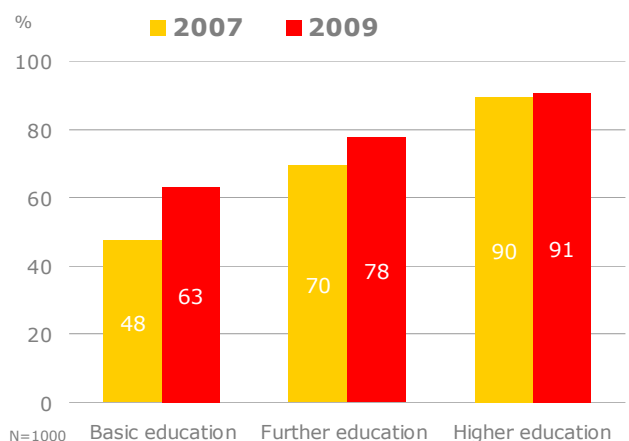
1.5 Use by Gender

Unlike lifestage and age, gender has only a minor effect on internet use and that effect has lessened since 2007. A slightly larger proportion of men (81.7%) than women (79.5%) use the internet in 2009.



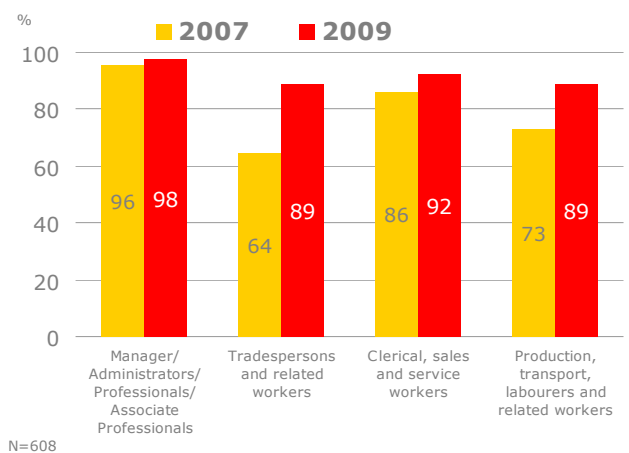
1.6 Use by Household Income

Internet use is directly related to income. The higher the income the more likely a person is to access the internet regularly. Just over a half of our respondents living in our lowest income households used the internet, while 96.1% of those in the highest bracket did so. Encouragingly growth in rates of internet use was stronger in the lower two income cohorts with a surprising (yet small) decrease in the middle income group.



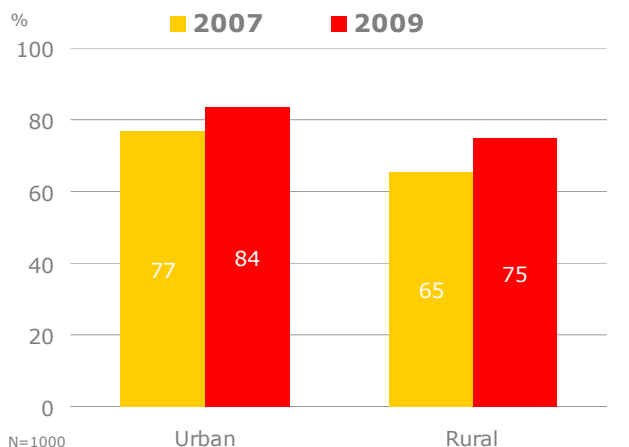
1.7 Use by Education

Education level also influences internet usage although differences are diminishing. Almost two thirds of the population with basic education (anybody who did not finish high school) is now on-line (63.2%). Usage rates amongst this group rose by fifteen percentage points between 2007 and 2009.



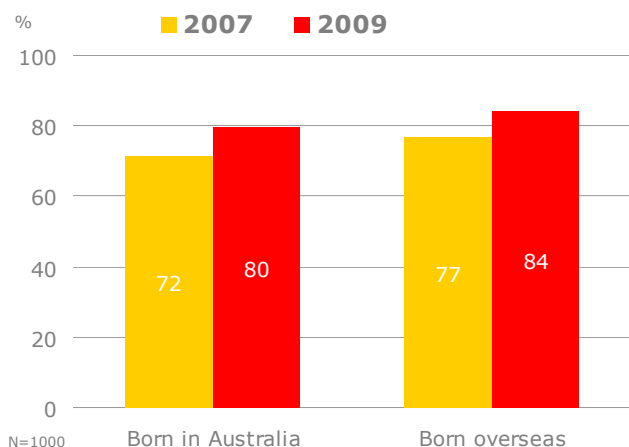
1.8 Use by Occupation

Difference in internet usage between occupation groups also reduced between 2007 and 2009. While almost all Australians who perform management, administration and professional work (97.7%) are internet users, around nine in ten of workers in our other categories were also using the internet.



1.9 Use by Location: Urban-Rural Divide

There is still a divide between city and country people in terms of internet use. Just over three quarters of respondents in non-capital city areas used the internet compared to 83.7% of those in capital city areas. In addition capital city dwellers were more likely to have a broadband connection exacerbating the difference in connectivity between urban and rural Australia.



1.10 Use by place of birth

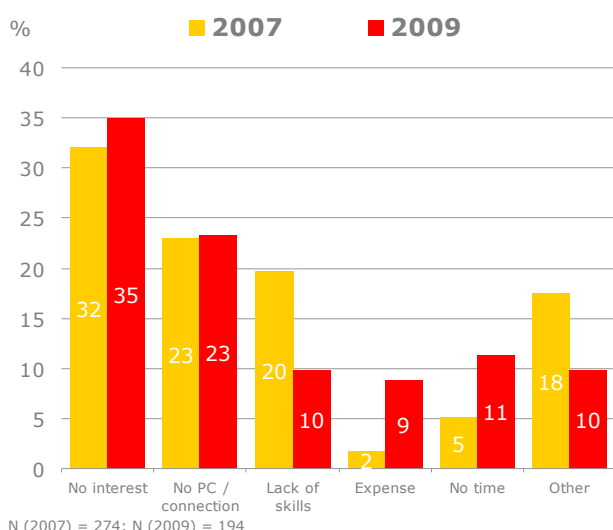
Whether people are born in Australia or overseas has little effect on internet use. People born overseas are slightly more likely than those born in Australia to use the internet (84.2% to 79.7%).

Older Australians however (65 and over) born overseas are much more likely than those born in Australia to use the internet (61.9% to 33.1%). This finding highlights some of the great benefits of internet access for Australians born overseas who wish to stay in touch with relatives or keep up to date with information from their country of birth.

Reasons for Non-Use

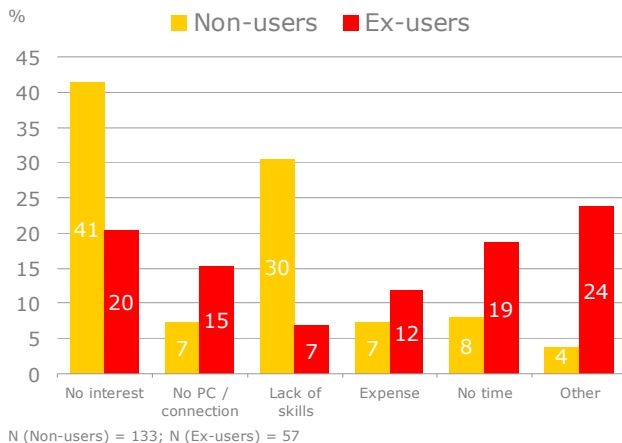
It is remarkable how quickly and widely Australians from diverse cultural and social backgrounds, circumstances and age groups have become internet users. While the proportion of Australians accessing the internet rose between 2007 and 2009, at this stage, the internet is still not a universal communications medium comparable to television, or an almost-universal information service like the telephone. Almost one in five Australians is not currently using the internet. Concerns about the digital divide remain, despite the reducing costs of computers and uptake of home access. As internet access and use has become more popular so concern for those without access has grown. Clearly factors such as income, education and level of employment all play a part in explaining whether someone does or does not use the internet.

Understanding this divide also requires knowing why people don't access the internet. School age children who don't access the internet because it is too expensive pose a different policy challenge from older people who don't access the internet because it doesn't interest them.



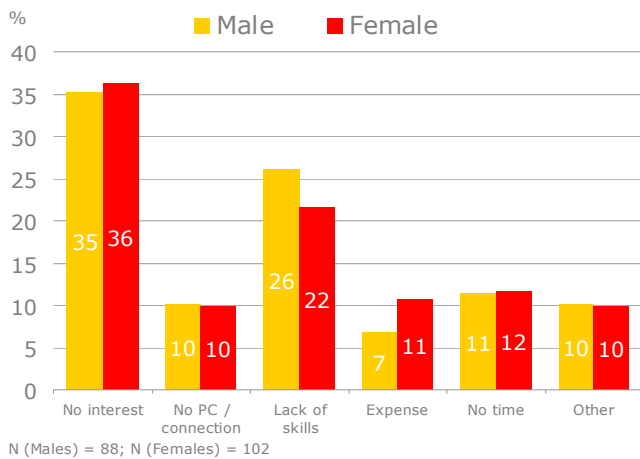
1.11 Primary reason for not using the internet

Reasons for not using the internet have not changed a great deal over the last two years. Lack of skills has become less of a barrier, while expense and lack of time have become more important as reasons that people do not use the internet.



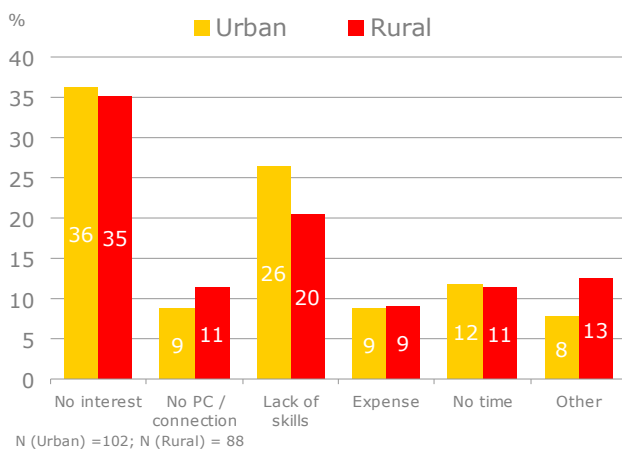
1.12 Primary reason for not using the internet, ex-users and non-users

The primary reasons that non-users do not access the internet is that they simply have 'no interest' (41.5%) and their 'lack of skills' (30.4%). For ex-users 'no interest' (20.3%) and 'no time' (18.6%) are the main impediments. For the majority of both non-users and ex-users of the internet, cost is not the primary reason for their decision not to use the internet.



1.13 Primary reason for not using the internet, males and females

For both female and male non-users lack of interest was the main reason for not using the internet followed by lack of skills. Perhaps surprisingly men were more likely than women to say that their non-use was due to not knowing how to use the technology (32.8% to 28.4%).

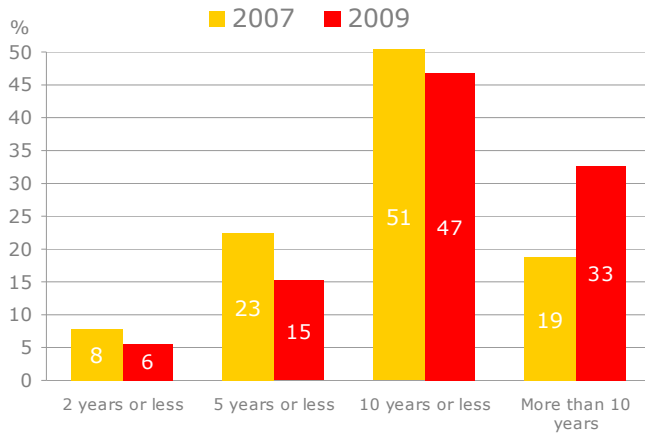


1.14 Primary reason for not using the internet, urban and rural (2009 only)

As in 2007 there was very little difference between urban and rural non-users' reasons for their not using the internet.

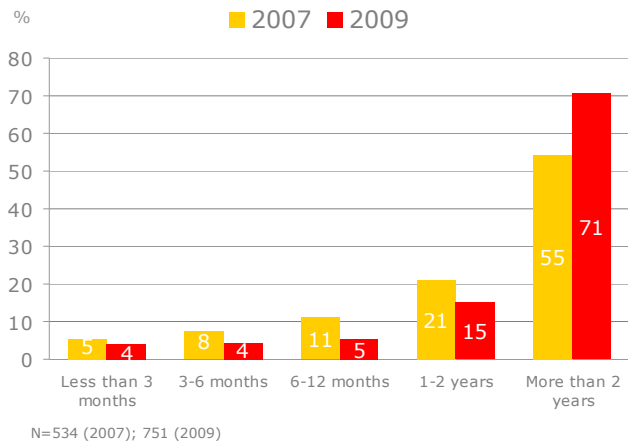
Access and Use

This section provides some basic information about Australian internet use. We look at how long people have been accessing the net and in what ways. We also look at where in the house people use the internet, and the type of connection they have at home.



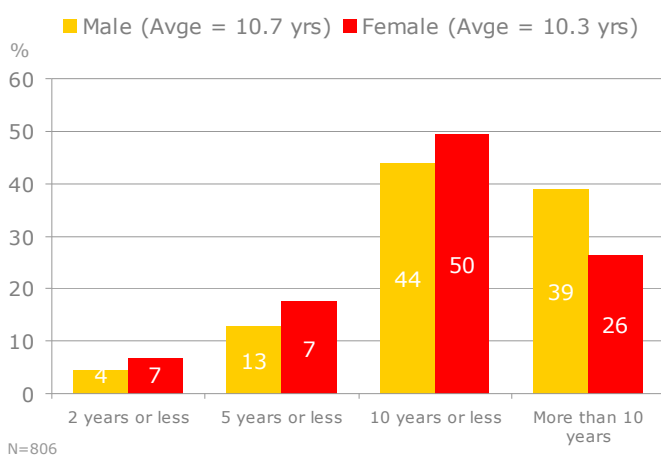
1.15 Years of Use

There are signs of saturation of internet use with none of our users having begun in the last year. Just under half of all users have been using the internet for between five and ten years (46.8%), with a further third having over ten years experience of the net.



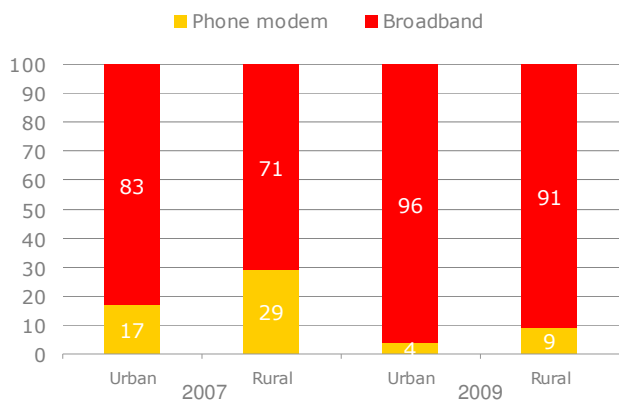
1.16 Years that Users have had Broadband Access

Broadband take-up is slower than in 2007, but it is still proceeding rapidly. In 2007 a quarter (23.9%) of those respondents with broadband access had acquired it within the previous twelve months while this figure was 14% in 2009. More than seven in ten broadband households had this service for more than two years.

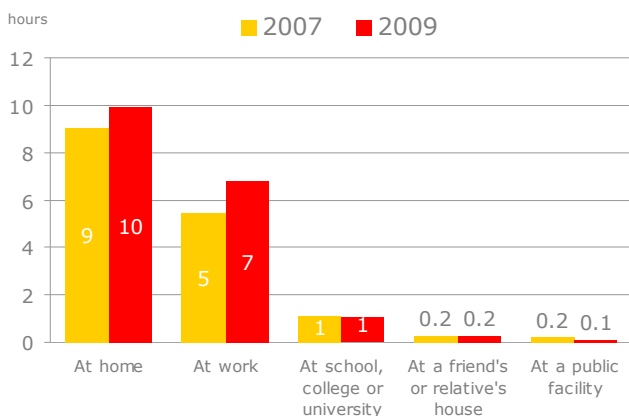


1.17 Years of Use by Gender

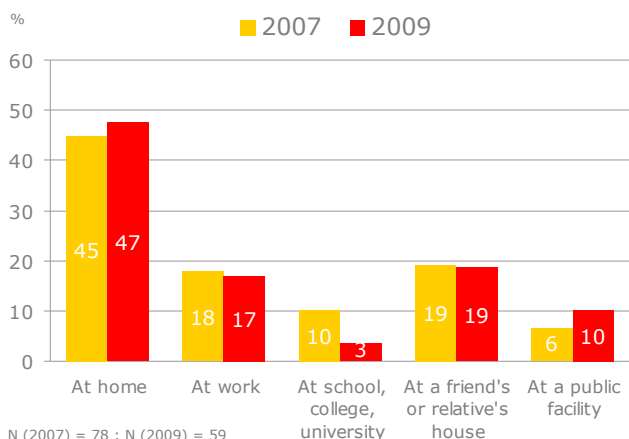
On average, male users have been online longer than female users by about 4 months. This gap has narrowed appreciably since 2007 (16 months). A quarter of female respondents had been using the internet for more than 10 years compared to almost four in ten men (26.2% to 38.8%).



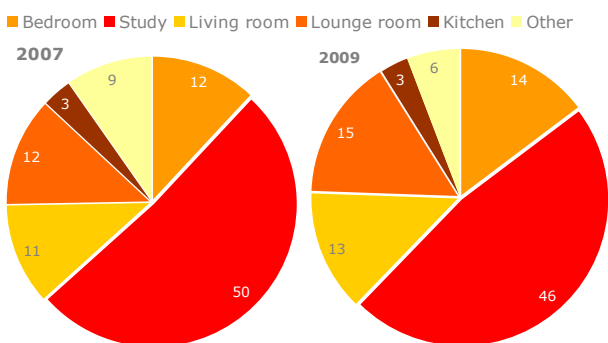
N (2007) = 726; N (2009) = 806



N (2007) = 726; N (2009) = 806



N (2007) = 78 ; N (2009) = 59



1.18 Household Access by Location: Urban/Rural

While dial-up access is fast disappearing there is still a clear difference between capital and non-capital city households in relation to broadband access. Only 4% of capital city households with internet access had a dial-up connection while almost one in ten non-capital city internet households did (9.4%). This difference is amplified by the lower overall internet penetration rates in rural Australia.

1.19 Locations of Use

Most internet use takes place at home with our users averaging ten hours per week from home (up an hour from 2007), followed by work use (6.8 hours up from 5.4 in 2007) and school, college or university access accounting for just over an hour. Although some of these locations are not much used on average, for particular users they can be very important.

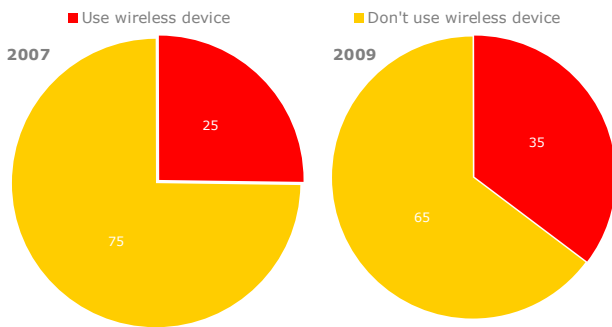
1.20 Locations of Use: Ex-users

Ex-users' main location of use remains home (47.5%), the next most common location was a friend or relative's house (18.6%). Work (16.9%), and public facility (10.2%) all had significant use. Interestingly 'at school, college or university' dropped markedly between 2007 and 2009 (10.3% to 3.4%), suggesting that the internet has become even more strongly integrated into younger people's lives.

Overall ex-users depended than the user population on third parties for their access, and therefore relied these relationships remaining stable.

1.21 Where in the House

Nearly half of those accessing the internet at home do so in a room designated as a study suggesting the strong relationship between the home adoption of computers and internet access and the increasing prevalence of the home office. There are however signs that internet access is beginning to move more towards entertainment and related uses with a slight decrease in study access and a small increase in bedroom, living room and lounge room access in 2009.

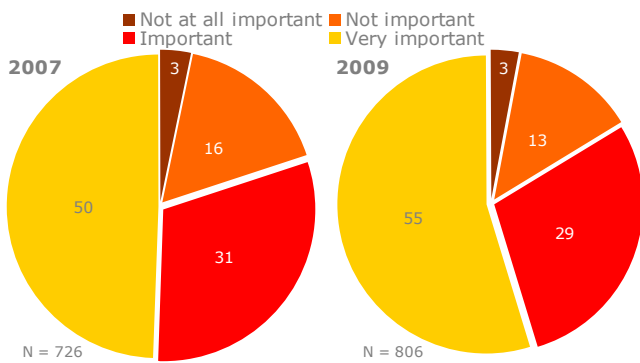


1.22 Accessing the internet through a mobile device

Those accessing the internet through a mobile device increased from around a quarter to more than a third (35%) of all internet users.

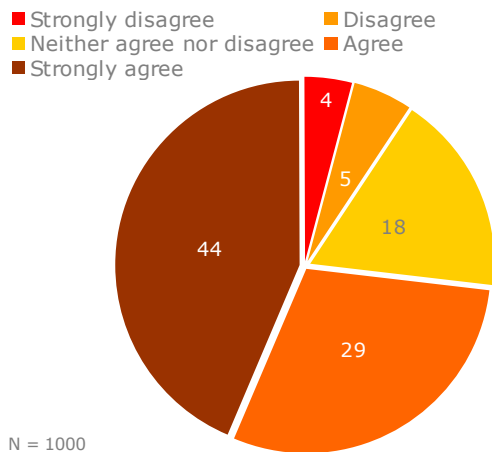
Attitudes to the internet

This section presents findings on people's attitude to the internet and their access to it.



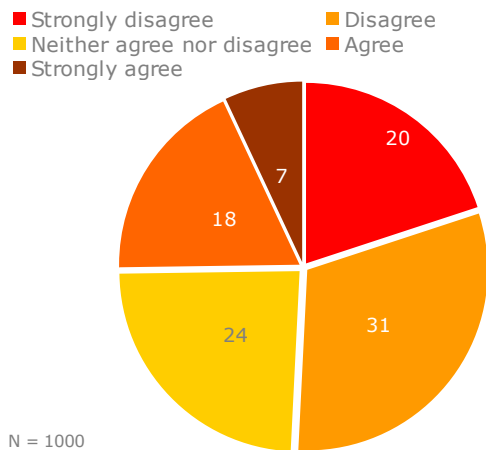
1.25 Importance of internet

The internet has very quickly become an important part of people's lives. Well over half of our sample described the internet as 'very important' (54.8%). A further 28.9% say that it is important. Only 3.1% are prepared to describe it as 'not at all important' while 13.2% feel that's 'not important'. This importance has grown slightly since 2007.



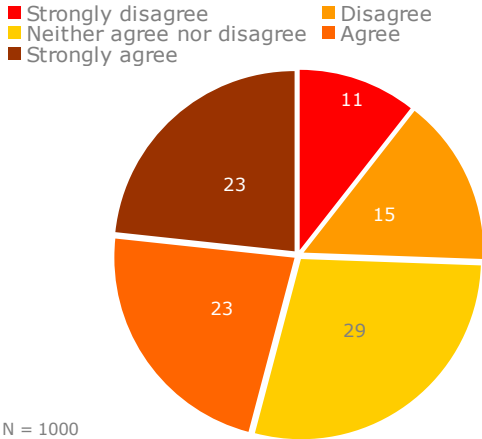
1.26 The internet makes life easier

Overall people are very positive about the effect of the internet on their lives. Approaching half of our respondents (43.5%) strongly agreed that the internet makes life easier while a further 29.4% agreed with this contention. Less than one in ten disagreed (4.2% strongly) while the remainder neither agreed nor disagreed (17.7%).



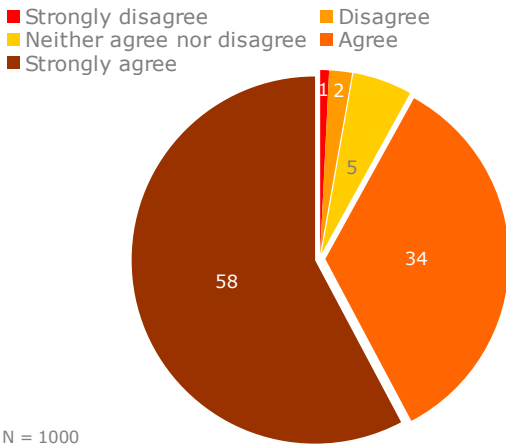
1.27 The internet is frustrating to work with

A half of Australians do not agree that the internet is frustrating to work with while a further quarter (24.0%) are ambivalent. A quarter do find it frustrating (25.2%), with 6.9% strongly agreeing that it is frustrating.



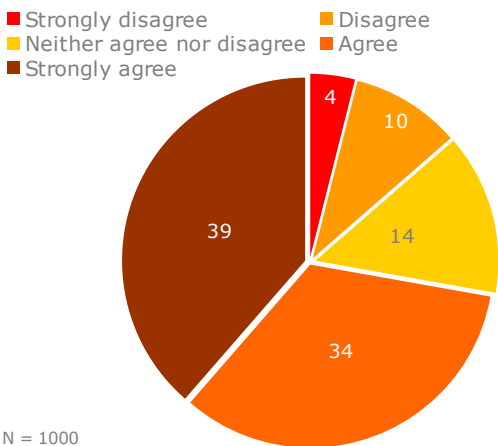
1.28 There is too much immoral material on the internet

A significant minority of Australians think that there is too much immoral material on the internet (45.8%). Almost one in ten (9.8%) say that they 'don't know' if this is case. The highest single response category was 'neither agree nor disagree' which accounted for 28.7% of the population. A quarter of Australians disagreed with this contention (25.4%).



1.29 The internet is a fast and efficient means to gain information

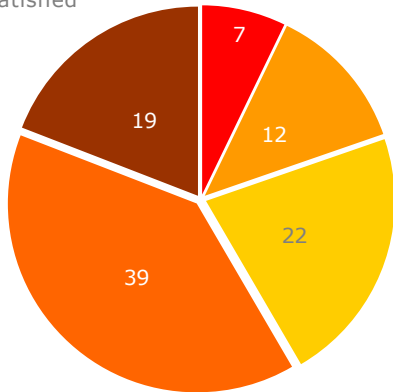
There was almost unanimous agreement with this statement. Nearly six in ten 'agreed strongly' (57.9%) and overall 92% 'agreed' or 'strongly agreed'. Very few disagreed- 2.7% in total.



1.30 The use of the internet can be addictive

Nearly three-quarters of our respondents agree that internet use can be addictive (72.3%), with just under four in ten 'agreeing strongly' (38.5%). Just over an eighth (13.5%) do not think that internet use can be addictive.

■ Very dissatisfied
■ Neutral
■ Very satisfied
■ Moderately dissatisfied
■ Moderately satisfied

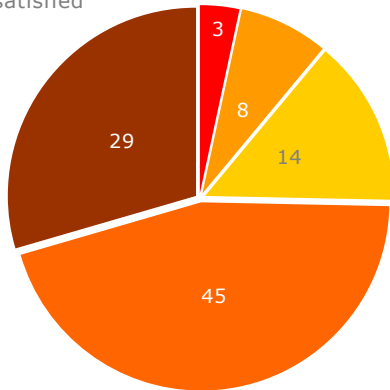


N = 806

1.31 Satisfaction with speed of home internet connection

Around one in five Australians are unhappy with the speed of their home internet connection (19.7%). Of these just over a third are very dissatisfied (7.2% overall). At the other end of the scale one in five (19.3%) are very satisfied and a further four in ten are satisfied (39.1%). Overall half of those with an internet connection are either dissatisfied with it's speed or neutral suggesting that significant underlying demand for National Broadband Network (NBN).

■ Very dissatisfied
■ Neutral
■ Very satisfied
■ Moderately dissatisfied
■ Moderately satisfied

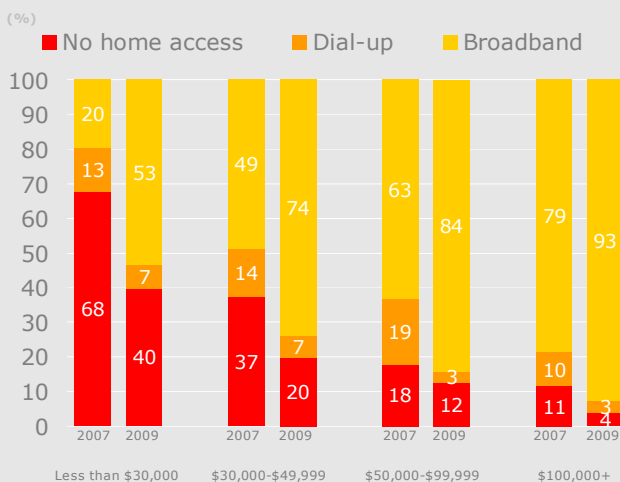


N = 806

1.32 Satisfaction with the reliability of home internet connection

Reliability does not appear to be an issue for the majority of Australians with an internet connection at home. Three in ten are very satisfied (29.5%) with a further 45.3% moderately satisfied. Just over one in ten are dissatisfied (11.0%) and of these around a third are very dissatisfied (3.4%).

Further Analysis

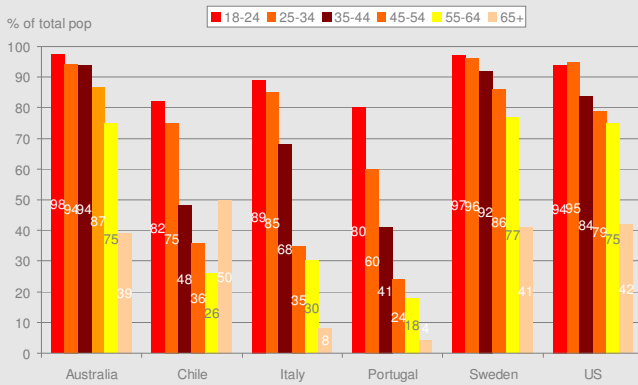


1.33 Home access by income

Examining home access by household income shows that the strongest growth in internet connection has been in the lower income households. In 2007 one in five households earning less than \$30,000 had broadband access while in 2009 this had increased to over half.

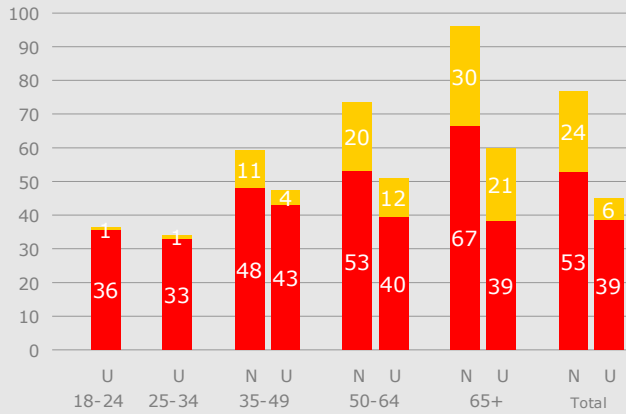
Despite this growth, there is still a large disparity in home internet access. More than nine in ten households earning more than \$100,000 have a broadband connection at home.

1.34 Internet use by age, selected countries



Australia's pattern of internet use by age is very similar to that of the United States and Sweden. Unlike 2007 Australia does not have a markedly different rate of usage amongst those aged over 65 years from countries with similar usage rates for the younger age groups.

(%) Don't know Too much immoral material on the internet

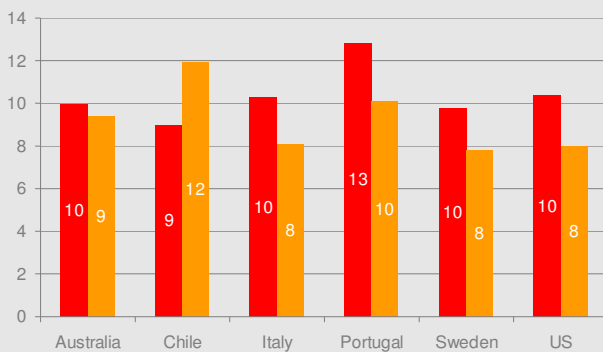


1.35 Immoral material on the internet by age and internet status

In relation to immoral material on the net there are two clear patterns. Older people are more likely than younger people to agree that there is too much and non-users (especially older non-users) are more likely than users to agree.

N= Non-user
U= User
NB: Too few 18-24 and 25-34 non-

Average hours at home Average hours at work



1.36 Hours of use at home and work, selected countries

Australians ten hours a week at home and nine hours at work on average is similar to the other countries in the comparison. Portugal has 13 hours of home use on average but overall the countries are remarkably alike

2 The internet and social networks

The impact of the internet on people's communication and social networks has been an area of great interest. Initially debate was polarised between those who saw the internet as a communication tool of extraordinary scope and those concerned with its possibly negative effects on face-to-face interaction. With the development of a multitude of platforms for social networking, debates have shifted to concerns about damaging uses of the network (such as cyber-bullying) and the complex privacy issues raised by social software such as Facebook and Myspace.

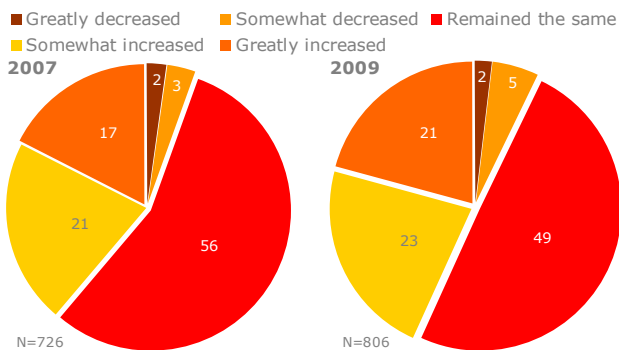
This section examines how people use the internet for communications and its impact on social networks.

Influence of the Internet on Social Networks

We asked a series of questions about how home internet access had changed people's contact with various social groups. Our respondents were almost entirely positive about internet access and communication.

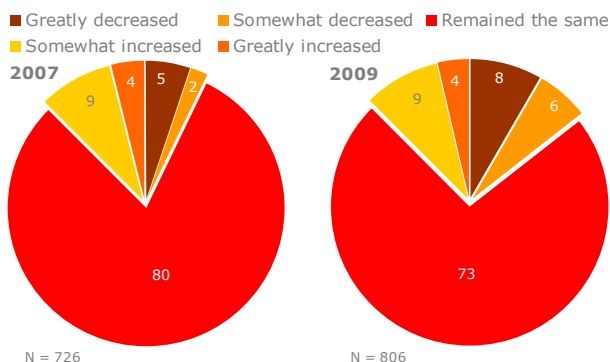
Overall people were much more likely to say that internet access had increased their contact with various groups rather than decreased it. More than four in ten respondents felt that their contact with people who shared hobbies or recreational activities had increased. The group that was most likely to have decreased was 'people who share your political interests' with 14.5% of respondents feeling that they had decreased contact (and only 12.6% claiming an increase).

Almost two thirds of respondents in 2009 felt that use of the internet had increased their contact with family (65.1%), with 30.4% saying that levels of family contact had not changed. Seven in ten reported increased contact with friends (70.7%). On the other hand, when asked about time spent face-to-face, sizeable minorities felt that they spent less time with household members (27.7%) and friends (14.8%) since being connected to the internet.



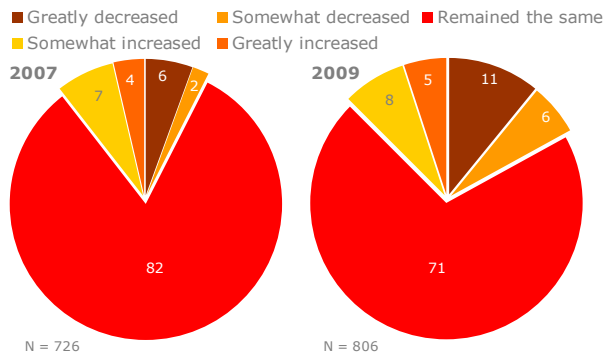
2.1 How has internet access affected your contact with people who share your hobbies/ recreational activities?

The proportion of respondents who said that their contact with people who shared their hobbies or recreational activities increased between 2007 and 2009 from 38.7% to 43.4%. Just under half our respondents (49.5%) said that it had remained the same.



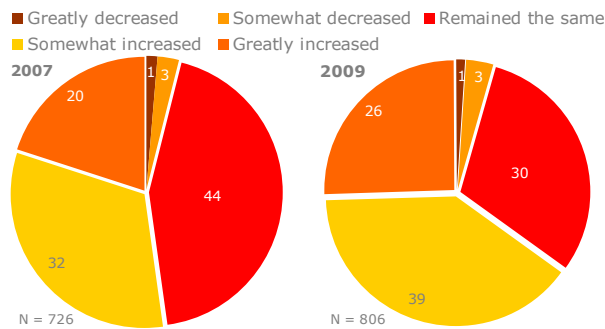
2.2 How has internet access affected your contact with people who share your political interests?

People were slightly more likely to say that internet access had decreased their contact with people who shared their political interests in 2009 (14.5% compared to 7.2% in 2007). In 2009 slightly more people felt that their contact had decreased than had increased (12.6%).



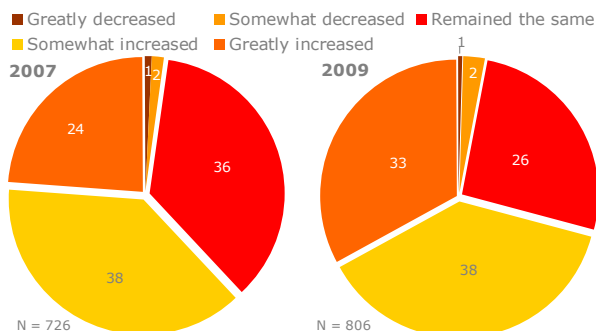
2.3 How has internet access affected your contact with people who share your religion?

In 2009 10.7% said their contact had greatly decreased (up from 5.6%) and a further 6.2% said that it had somewhat decreased (1.8% in 2007). The vast majority of those for whom the question was applicable (70.6%), felt that the internet had no effect on their contact with 12.5% answering that it had increased their contact. The proportion of respondents who said that this question was not applicable rose from 30.6% to 36.4%.



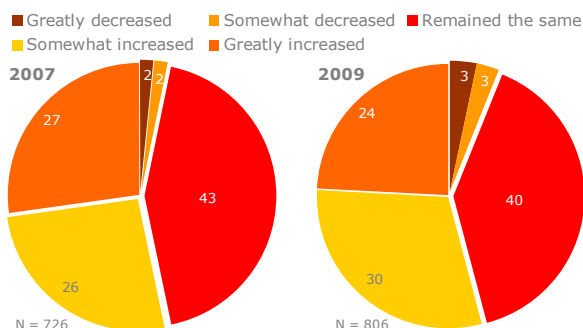
2.4 How has internet access affected your contact with your family?

An even greater proportion of respondents in 2009 (65.1% to 52.1%) thought that the internet had increased their contact with family members. The vast remainder of respondents (30.4% overall) thought their contact had not changed with 4.4% saying that contact had decreased.



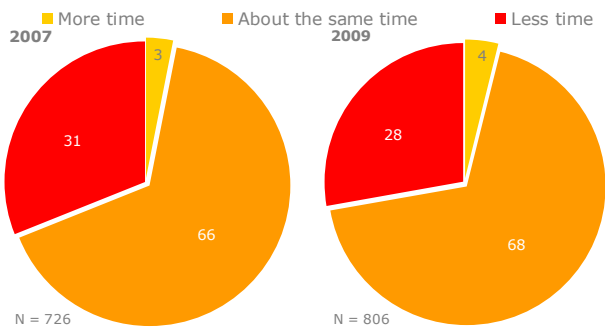
2.5 How has internet access affected your contact with friends?

A similar pattern is evident with contact with friends. The proportion of people who thought their contact with friends had greatly increased jumped from around a quarter in 2007 (23.9%) to a third in 2009 (33.0%).



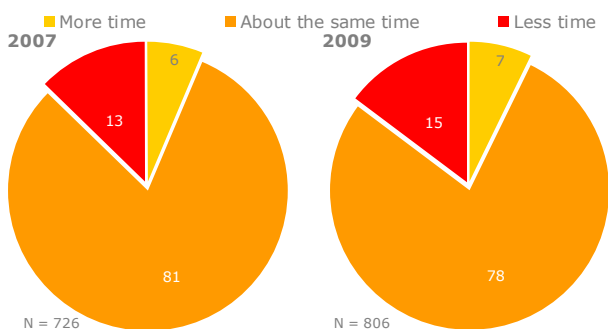
2.6 How has internet access affected your contact with people in your profession?

The majority of respondents for whom this question was applicable felt that the internet had increased their contact with people in their profession. There was very little difference between 2007 and 2009.



2.7 Since being connected to the internet have you spent more or less time face to face time with household members?

There was little change between 2007 and 2009 for this question. More than two thirds (68.4%) of respondents in 2009 said that face to face contact hadn't changed since connection while 27.7% said that it had decreased (31.1% in 2007).

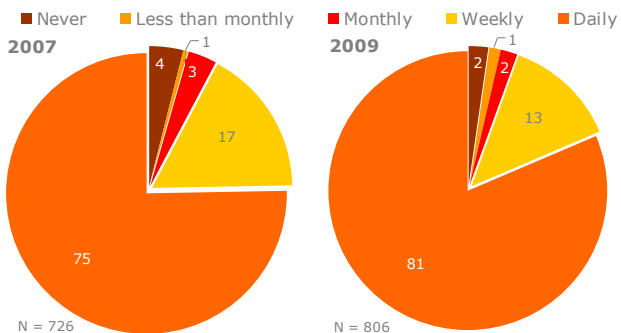


2.8 Since being connected to the internet have you spent more or less time face to face time with friends?

There was little change for this question as well. Much fewer respondents thought that their face to face interaction with friends had decreased since gaining internet access (14.8%) relative to members of their household. Just under eight in ten respondents said there had been no change (78.0%) while 7.2% said that they had seen more of their friends since access.

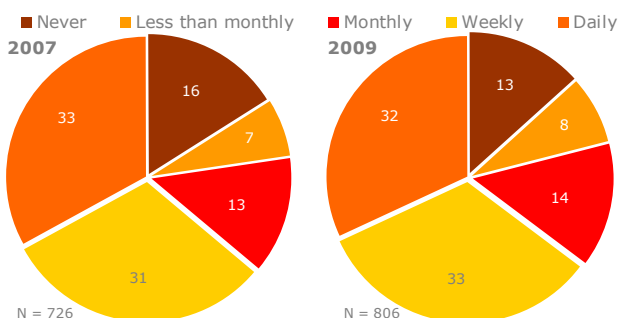
Ways of Communicating Online

This section looks at how often, and in what ways, Australians use the Internet to communicate.



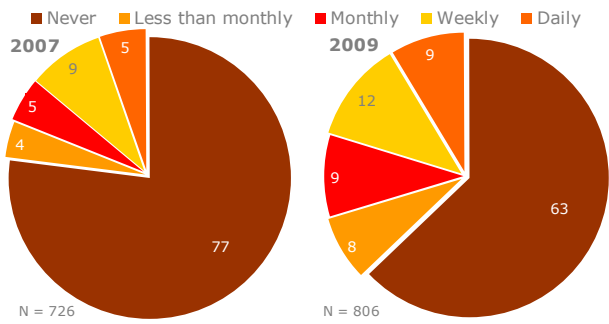
2.9 How often do you check your email?

Overall people were checking their email slightly more often than 2007. Those who check daily rose from 75.2% to 81.3%. The proportion that do not use email at all fell to 2.1% suggesting that email is still the most ubiquitous application on the web.



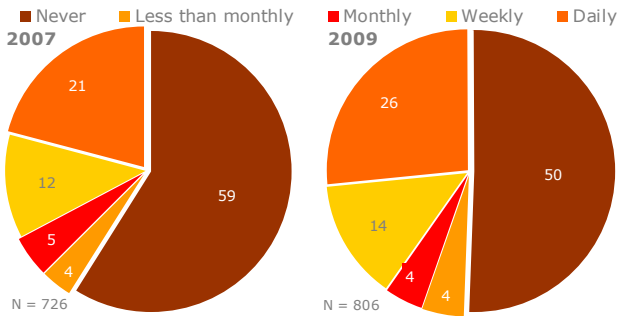
2.10 How often do you send attachments with your email?

There was little change in this activity in the last two years. Most people send emails with attachments at least once a week (64.7%) while only 13.4% of those with access to the internet never send attachments.



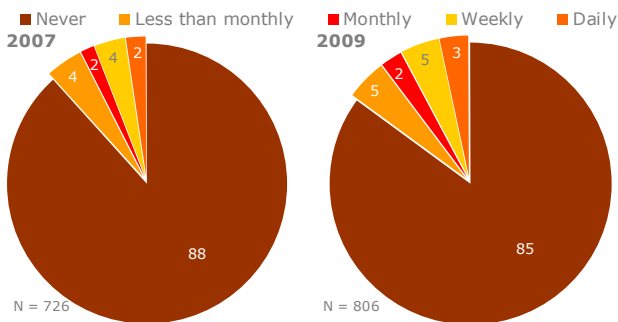
2.11 How often do you post messages on discussion or message boards?

Respondents were more likely to post messages in 2009 and to do so more frequently. In 2009 37.3% of internet users posted messages compared to 23.3% in 2007.



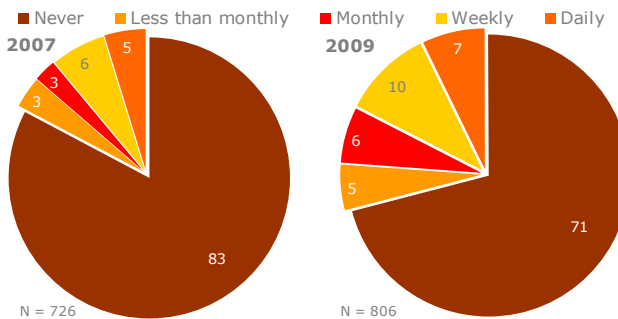
2.12 How often do you instant message?

Use of instant messaging has increased slightly with just under a half (48.8%) engaging in this activity (41.3% in 2007). More than a quarter (26.3%) of our sample used instant messaging at least once a day, up from 20.8% in 2007.



2.13 How often do you participate in chat rooms?

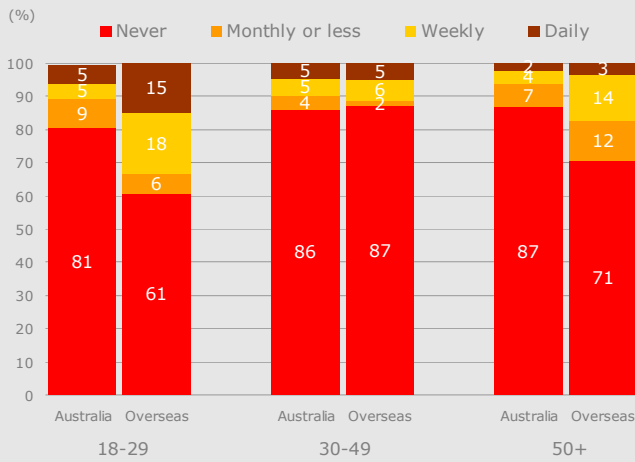
Most users do not participate in chat rooms. There has been a very small increase in usage over the last two years but still the vast majority of respondents do not participate (85.0%).



2.14 How often do you make or receive phone calls over the internet?

There was a strong increase in the use of the internet to make and receive telephone calls over the last two years. In 2007 only 17.2% of internet users were using a VOIP service but this jumped to 29.2%. In 2009 17.5% of users made a phone call over the internet at least once a week and 7.3% did so daily.

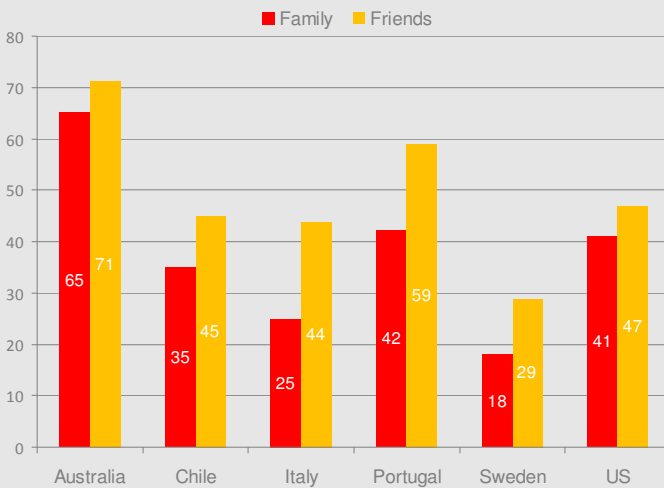
Further Analysis



2.15 How often do you make or receive phone calls over the internet by age and place of birth

People born overseas are more likely to be using the internet to make or receive phone calls, however this difference is at either end of the age spectrum. In the mid-age group (30-49) there is little difference. For those aged 18-29, a third of those born overseas are making or receiving calls online at least weekly (33.3%) compared to only one in ten of those born in Australia.

In the oldest group 17.2% of those born overseas are making or receiving calls online compared to just 6.3% of those born in Australia.



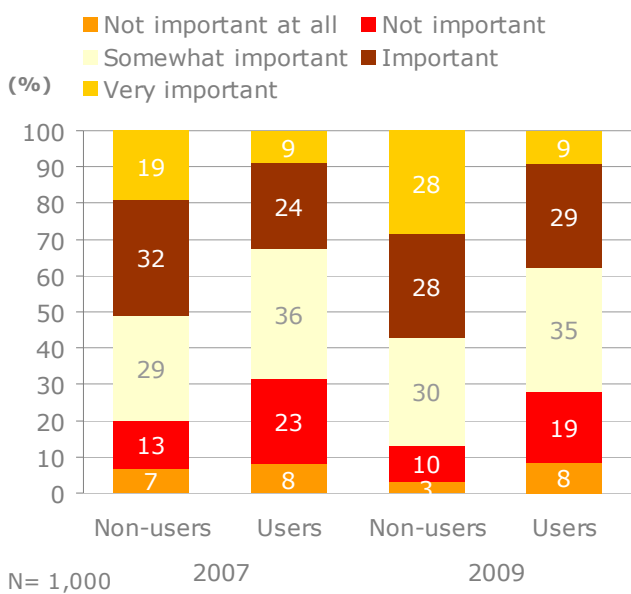
2.16 How has internet access affected your contact with friends and family

Australians are very positive about the impact of internet access on their contact with friends and family. Australia has the highest proportion of the internet population who feel that access has increased their contact with both family and friends (65% and 71% respectively). Portugal (42% and 59%) is the next most positive with Sweden (18% and 29%) the least positive.

3 The internet and the media

One of the major debates sparked by the development of the internet has been the future of the mass media. The ease of updating and adding stories to sites and the ability of users to access content whenever it is convenient make the internet a powerful medium for disseminating information. The impact on professional journalism of the internet's increasing importance as a source for news and information is unclear. At present there is much concern regarding the future of newspapers and great activity in developing business models to support quality online journalism. This section examines these issues and makes comparisons between internet users and non-users in their off-line behaviour.

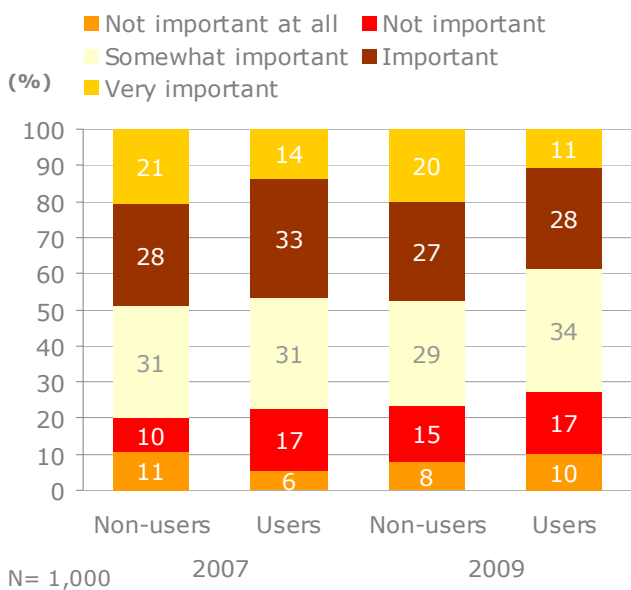
To place the role of the internet as an information source in context we asked participants about the importance of various media as a source of information. This section assumes a clear delineation between internet consumption and that of traditional media that does not exist in practice. Where respondents are asked about newspaper reading or television watching they are referring to their off-line behaviour. As the internet develops this distinction will become increasingly difficult.



3.1 For information in general how important is television?

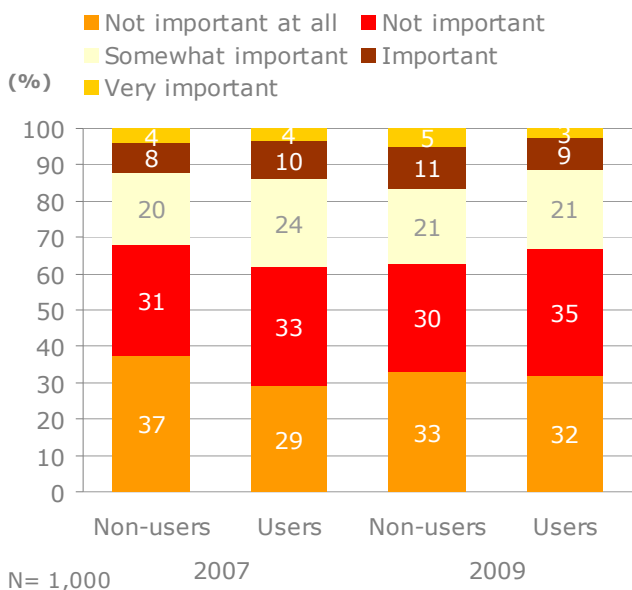
Television is an information source for a majority of people whether they are internet users or not. However, there is a difference in television's perceived importance as an information source. In 2009 non-internet users were three times more likely than internet users to describe television as a very important information source (28.5% to 8.9%). And around twice as many internet users (27%) than non-users (13%) described television as not important.

For both users and non-users alike the importance of television increased slightly between 2007 and 2009.



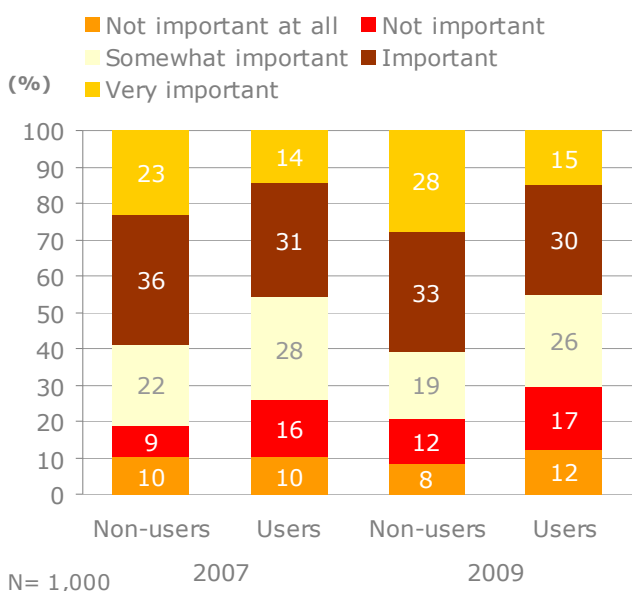
3.2 For information in general how important are newspapers?

The proportion of internet users who described newspapers as important or very important sources of information dropped slightly between 2007 and 2009 (46.7% to 38.9%). Still for most people, newspapers are at least a somewhat important source of information.



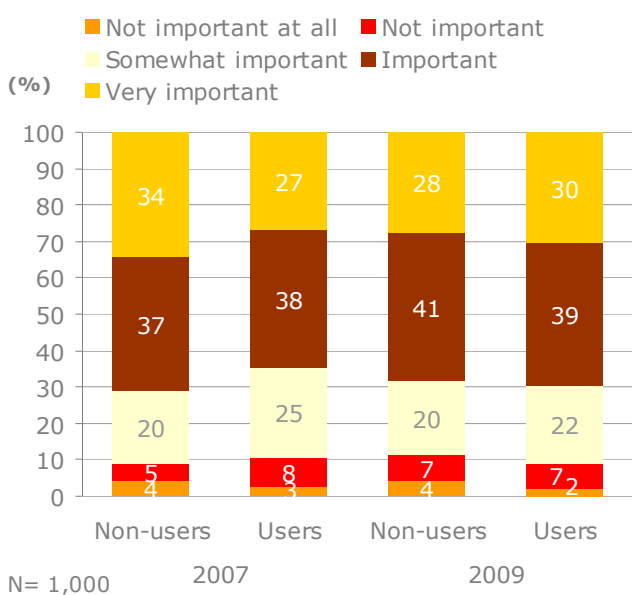
3.3 For information in general how important are magazines?

Magazines were not considered important for information by a majority of respondents. Over the last two years they became slightly more important for non-users of the internet and slightly less so for internet users.



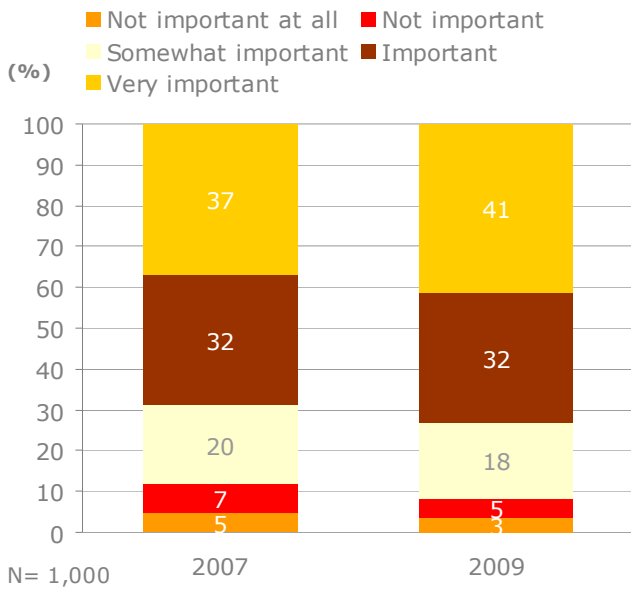
3.4 For information in general how important is radio?

The results for radio changed very little between 2007 and 2009. In 2009 just over six in ten non-internet users (60.6%) considered radio an 'important or very important' information source compared to 45% of users.



3.5 For information in general how important are interpersonal sources?

There was little change over the period. Around nine in ten users and non-users in 2007 and 2009 regard interpersonal sources as at least 'somewhat important' sources of information.



3.6 For information in general how important is the internet?

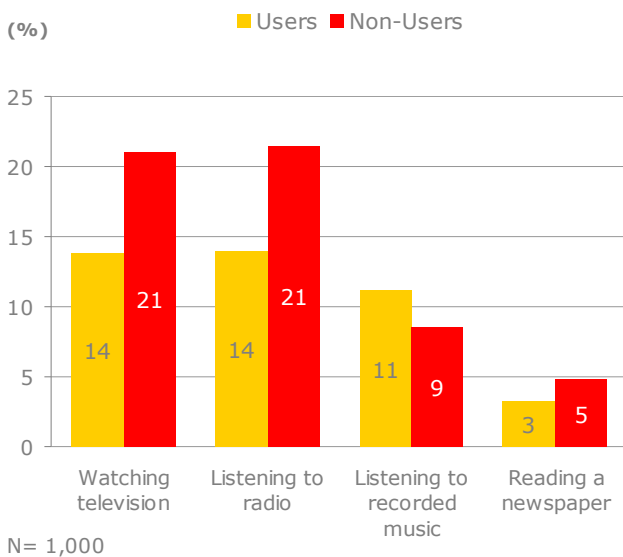
For users, the internet has become a very important source of information. It is more important than the traditional media of newspapers, radio and television. Just under three quarters of users described the internet as 'important' or 'very important' (73.4%) in 2009.

For television the corresponding figure is 37.8%, for newspapers 38.9% and for radio 45.0%.

The difference is even more marked when we look just at the 'very important' rating. The proportion of users rating the internet as 'very important' (41.2%) is more than double that for radio (15.1%), and around four times greater than for newspapers (10.6%) and television (8.0%). For users the internet increased slightly in importance over the last two years.

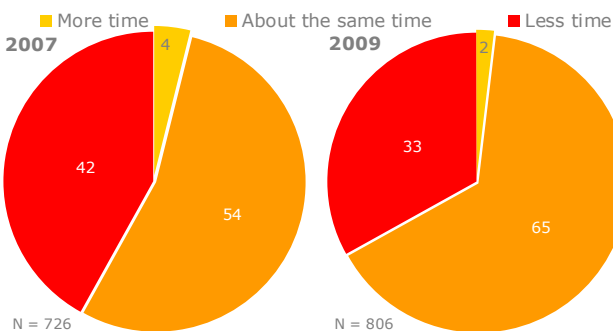
Time spent on media

This section examines the amount of time people devote to various media during a week and how internet users think that internet access has affected their use of various media.



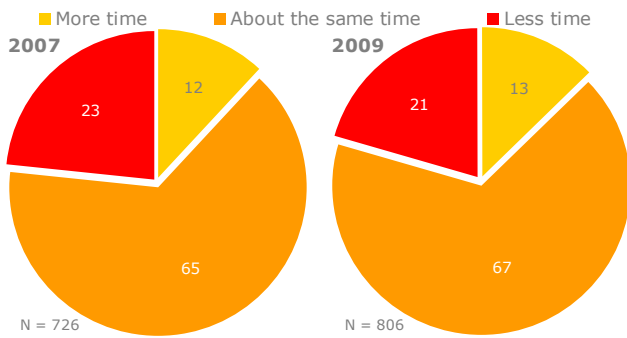
3.7 On average how many hours a week do spend watching television, listening to radio and reading books?

On average, internet users spend around a third less time than non-users watching television and listening to radio (approximately 7 hours a week). They also spend less time reading newspapers (3.3 hours to 4.8 hours). They do however spend more time listening to recorded music (11.2 hours compared to 8.6 hours).



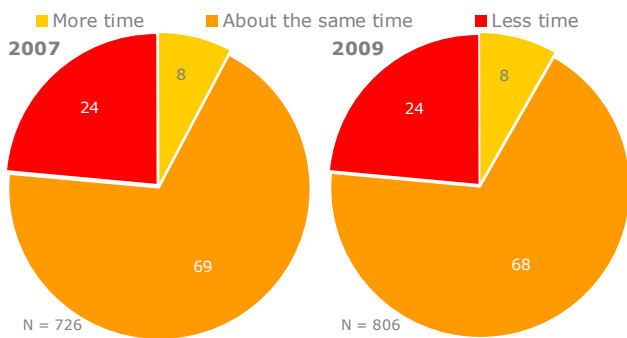
3.8 How has being connected to the internet changed the amount of television you watch?

The proportion of internet users who feel that they watch less television since becoming connected dropped between 2007 and 2009 (41.9% down to 33.0%).



3.9 How has being connected to the internet changed the amount of time you spend reading books?

There was very little change between 2007 and 2009. Around two thirds of internet users in both periods believe that they spend the same amount of time reading books as they did before accessing the net. More than one in ten believe it has increased while just over a fifth (23.3% in 2007 and 20.6% in 2009) think that they read less often.

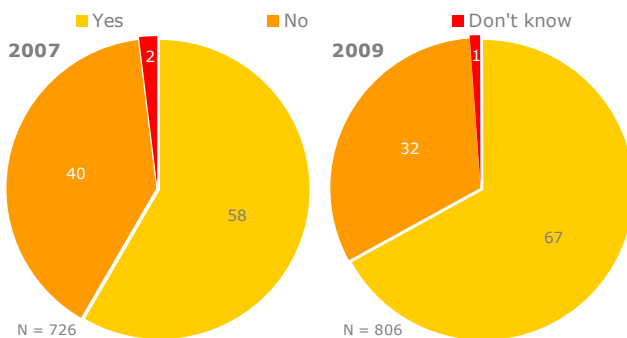


3.10 How has being connected to the internet changed the amount of time you spend reading newspapers?

There was almost no difference in responses to this question from 2007 to 2009. Over two thirds of internet users felt that they spent the same time reading newspapers (off-line) since internet connection (68.2% in 2009). Just under a quarter (23.5%) felt they spent less time reading the newspaper and 8.3 thought their newspaper reading had increased.

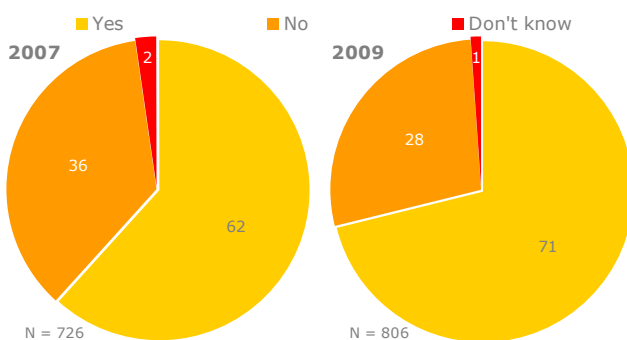
Use of the internet for information seeking

This section looks at how people seek information online.



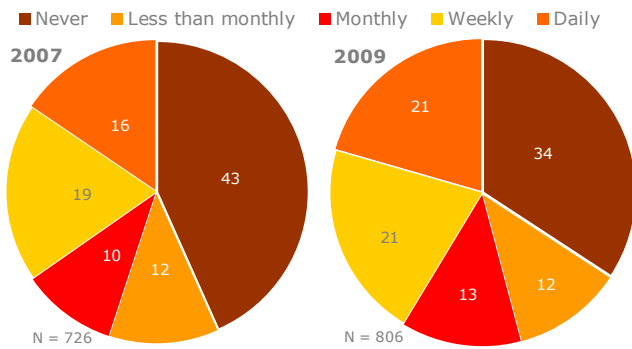
3.11 If a large local story was breaking, would you visit an online news service to get information?

The role of the internet as a news source for users has strengthened in the last two years. While in 2007 a clear majority of internet users (58.3%) would use the internet to find information on a large local news story that was breaking, by 2009 this had grown to over two thirds of users (67.0%).



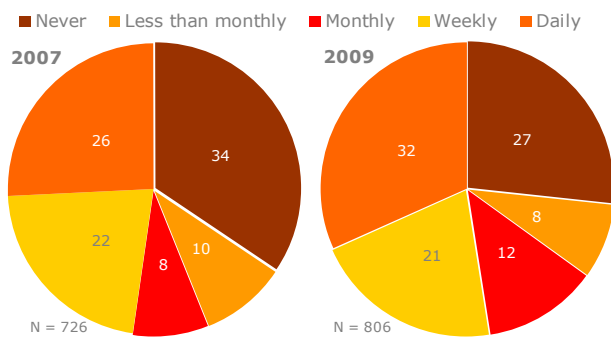
3.12 If a large international story was breaking, would you visit an online news service to get information?

A similar pattern as that for local news. In 2007 more than 6 in 10 internet users would visit an online news service to get information on a breaking international story. This proportion grew to more than 7 in 10 in 2009 (71.2%). This highlights the growing importance of the internet as a global news source.



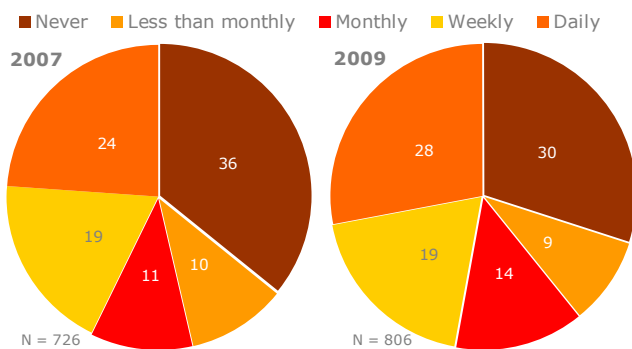
3.13 How often do you look for local community news on the Internet?

While a majority of users looked for local community news on the net in 2007 (56.8%), by 2009 this figure had grown to just under two thirds of users (65.8%). More than four in ten now do so at least weekly (41.5%), with one in five looking on a daily basis (20.6%).



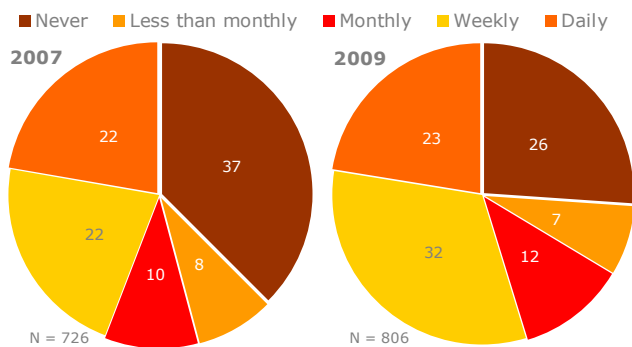
3.14 How often do you look for national news on the Internet?

In 2007 two thirds of users looked for national news on the internet (65.7%). In 2009 this had grown to nearly three quarters (73.3%). Those looking daily grew from 25.8% to 31.8%.



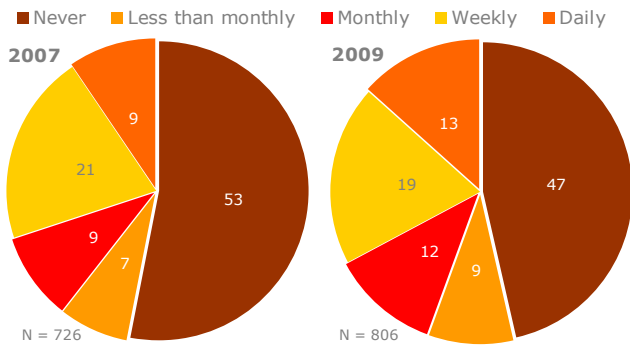
3.15 How often do you look for international news on the Internet?

The pattern for international news is very similar to that for national and local with a small increase in the proportion of people looking online (64.1% to 69.9%). In 2009 just over a quarter searched on a daily basis (28.0% up from 24.0%) with a further 19.4% looking weekly.



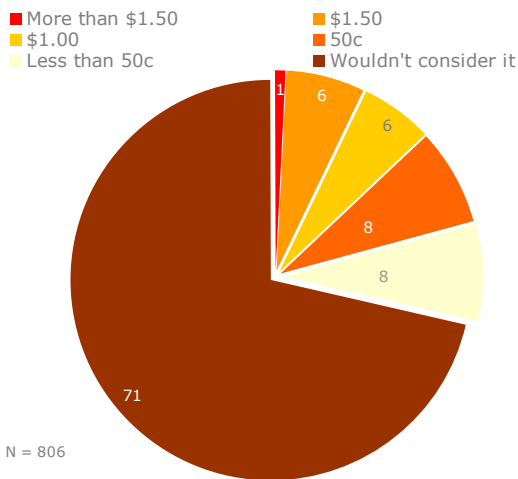
3.16 How often do you check weather forecasts on the Internet?

Almost three-quarters of internet users check weather forecasts online in 2009 (73.8% up from 62.6% in 2007). Twenty three percent do so daily, while a further 32.2% check weekly.



3.17 How often do you look for sports information on the Internet?

There was an increase in the proportion of people who used the internet to check sports information (46.8% up to 53.5). The proportion looking daily increased from 9.4% to 13.4% while the proportion checking weekly remained at around one in five.

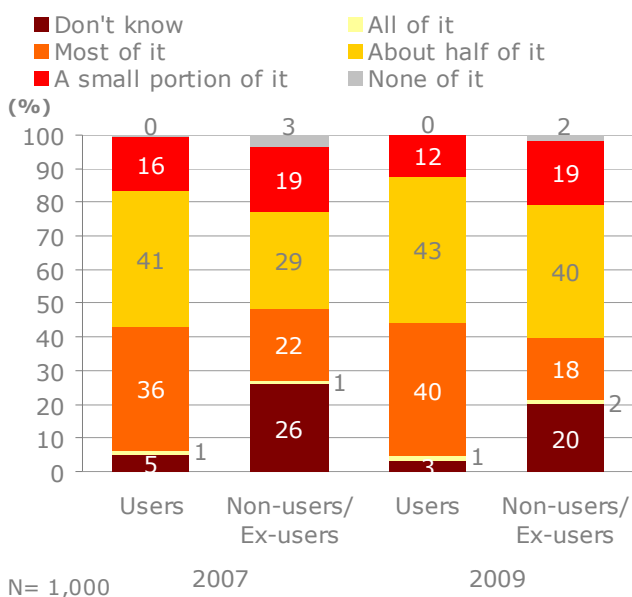


3.18 How much would you be prepared to pay to read an online newspaper?

The uncertain future of newspapers and the search for an online business model is a continuing public policy concern. To investigate this issue we asked respondents whether and how much they would be prepared to pay to read an online newspaper. Nearly three quarters of Australians say they would not consider paying (71.4%). Just 7.2% would pay the current price of a printed newspaper (\$1.50).

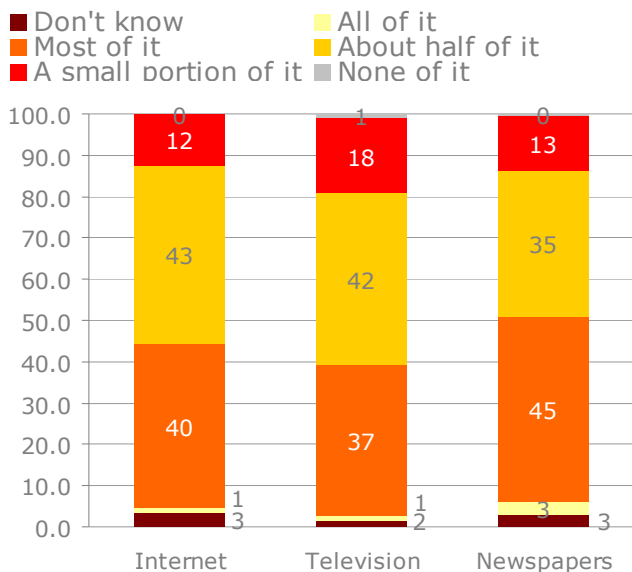
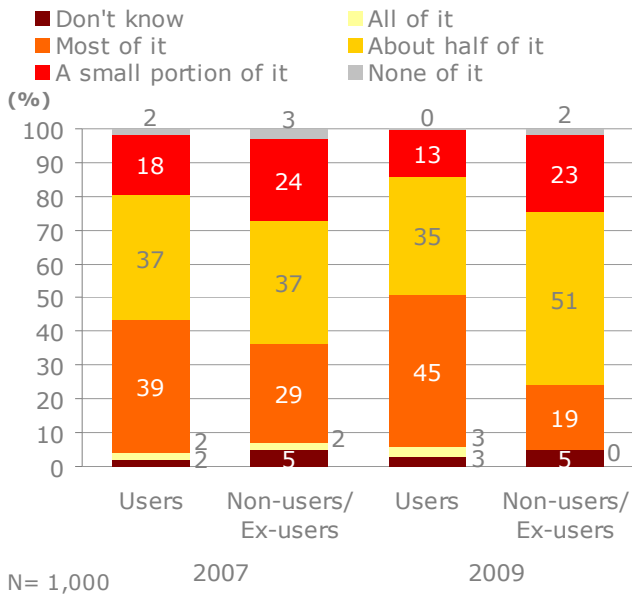
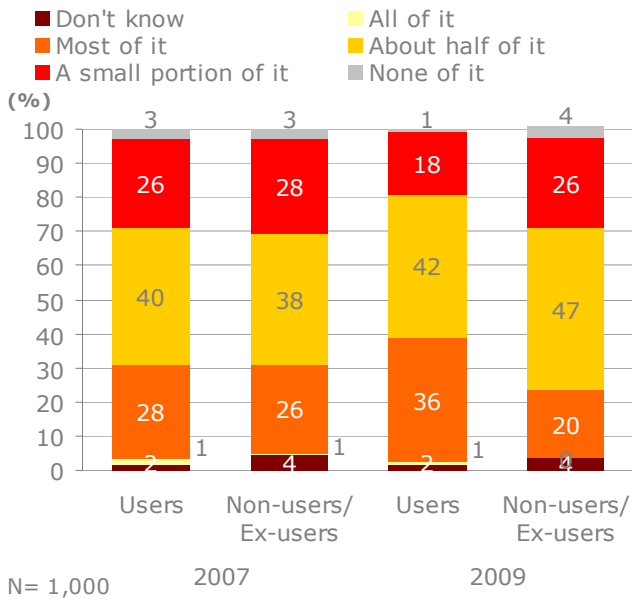
Trust in Media

The ease with which information can be posted on the net by large numbers of people raises the issue of reliability and trust. This section examines this issue by looking at internet users' and non-users' perceptions of reliability of information on the web and on other forms of media.

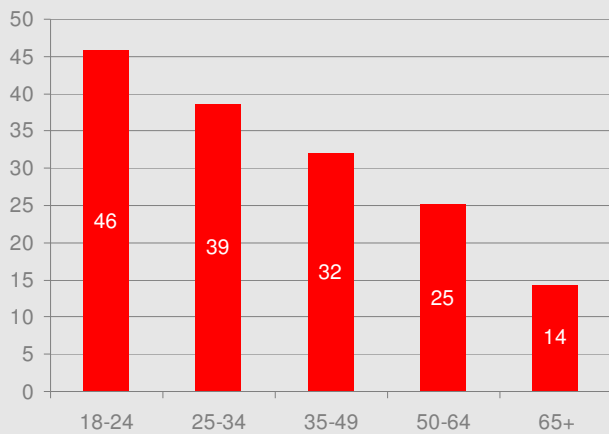


3.19 How much of the information on the world wide web is reliable?

Overall users and non-users both thought that information on the world wide web was more reliable in 2009 than 2007. The difference between users and non-users on this question remained in 2009, although non-users were less likely to say they didn't know (26.3% down to 20.1%). In 2009 no user thought that no information on the web was reliable while a few non-users believed this (1.5%). Eighty-four per cent of users (84.1%) thought that at least half of the information on the web was reliable (78.4% in 2007) compared to just under six in ten non-users (59.3% up from 51.0%).



Further Analysis



3.23 Being connected to the internet has led to me watching less television by age 2009

Watching less television due to internet access is strikingly related to age. For those in the 18-24 age group close to half feels that they watch less television (45.8%). This proportion drops steadily as you move through the age groups. For those aged over 65 only 14.3% say that they watch less television.

	Internet	TV	Papers	Radio
Australia	73	38	39	45
Chile	79	61	68	51
Colombia	88	68	70	72
Cyprus	71	71	48	42
Czech Republic	75	69	52	42
Italy	80	58	62	43
Macao	64	52	63	22
Mexico	79	62	73	52
Portugal	79	77	67	58
Sweden	58	68	55	49
United States	79	69	60	59

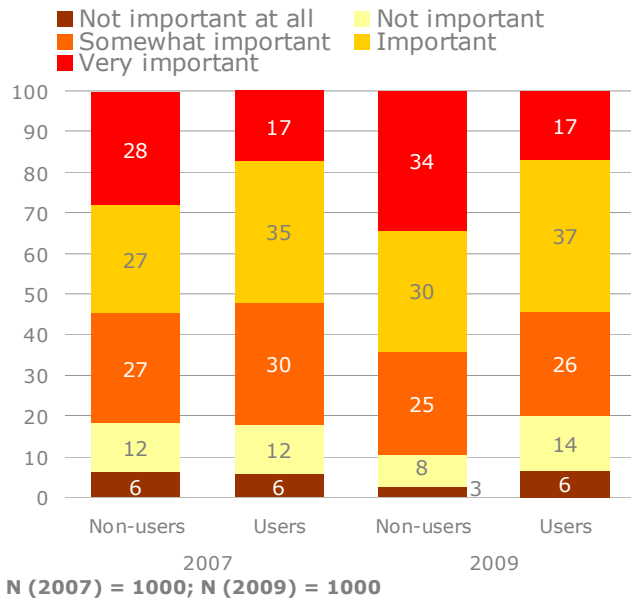
3.24 Important sources of information, selected countries

Sweden was the only country in our group for whom the internet was not the most important source of information for internet users. Australia had the smallest proportion of its user population claiming television and newspapers as important sources of information.

4 The internet and entertainment

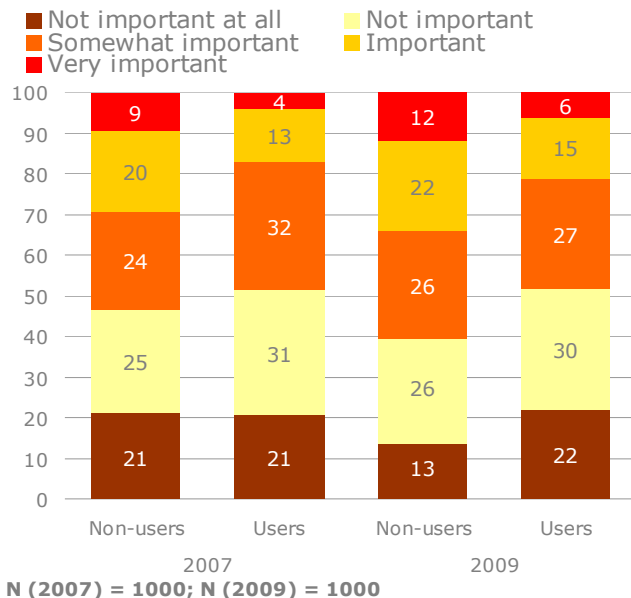
The emergence of YouTube in the last few years has underlined the importance of the internet as an entertainment medium and its potential. Much corporate effort has been put into exploring the convergence between the internet and other entertainment platforms such as television and radio.

This section looks at how Australians are using the internet to entertain themselves and undertake various hobbies and recreational pursuits.



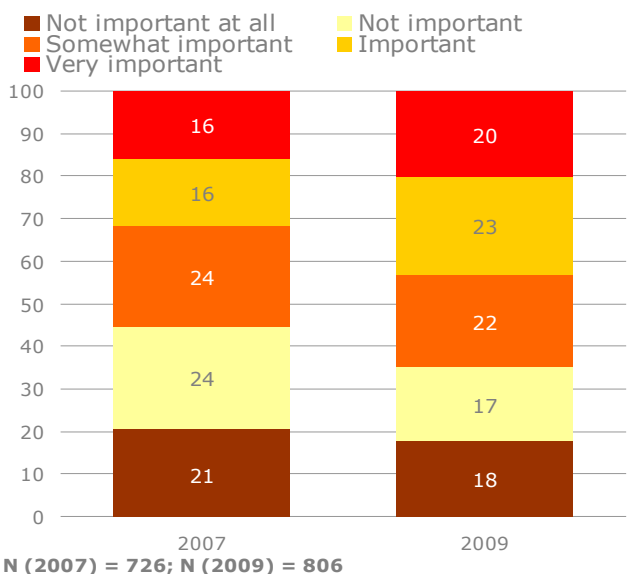
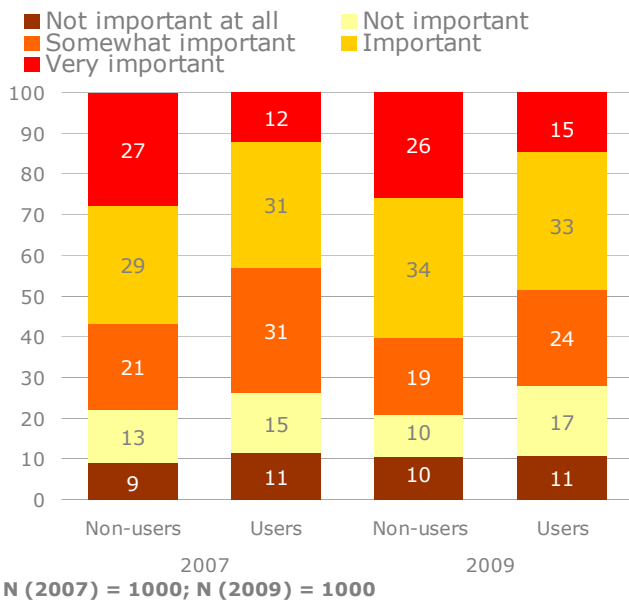
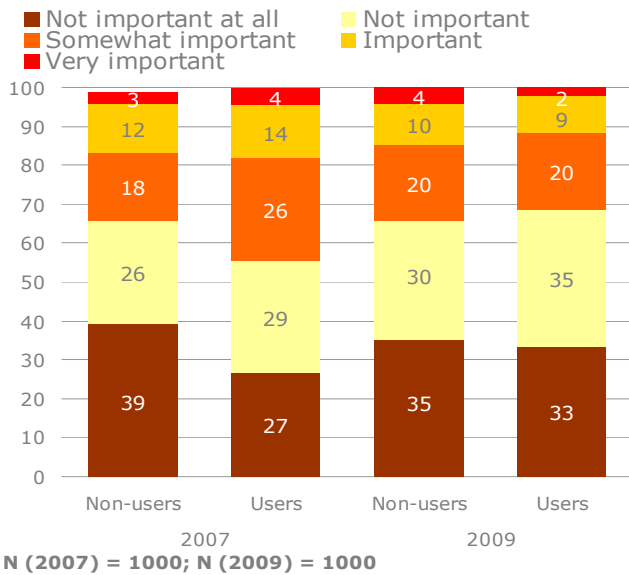
4.1 For entertainment in general how important is television?

Television's role as an entertainment source has changed very little for both internet users and non-users. A greater proportion of non-users rated television as a 'very important source' in 2009 (27.7% up to 34.2%) so that non-users are now twice as likely to consider television in this way than internet users (34.2% to 16.9%).



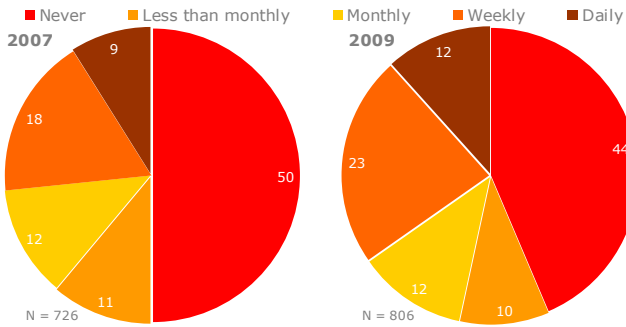
4.2 For entertainment in general how important are newspapers?

Non-users continue to be more likely to consider newspapers as an 'important' or 'very important' entertainment source than internet users. Both groups were slightly more likely to do so in 2009. In 2007 28.8% of non-users were in these categories, increasing to 34.2%, while for internet users the corresponding figures were 16.6% and 21.3%.



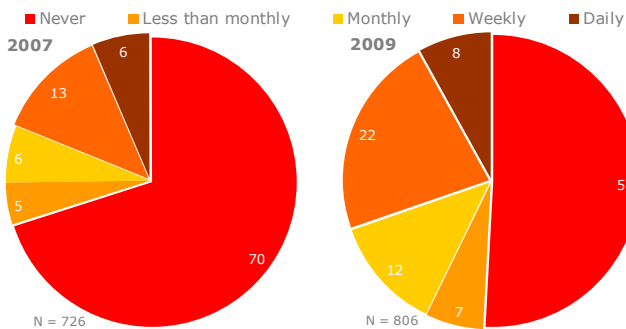
Use of the internet for entertainment

This section looks at how people use the internet for entertainment purposes.



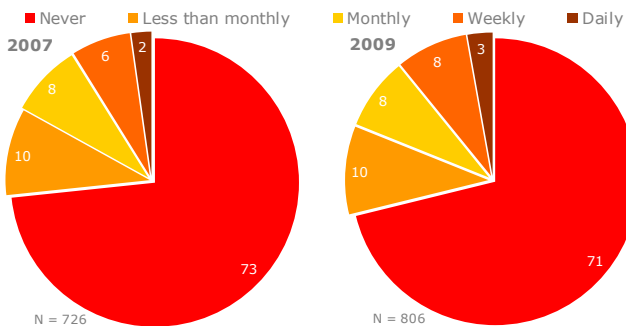
4.6 How often do you download or listen to music online?

In 2009 more than half of users downloaded or listened to music online (56.3% up from 49.9% in 2007). More users were listening more often as well. Those listening daily increased from 9.0% to 11.8% while those listening weekly went from 17.6% to 23.0%.



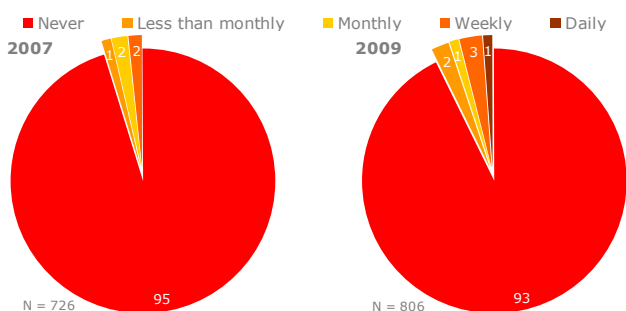
4.7 How often do you download or watch movies, TV shows, video clips etc (eg Youtube)?

In 2007 three in ten users downloaded or watched video of some kind online. This increased to five in ten in 2009. The proportion doing so weekly increased from 19.0% to 30.4%.



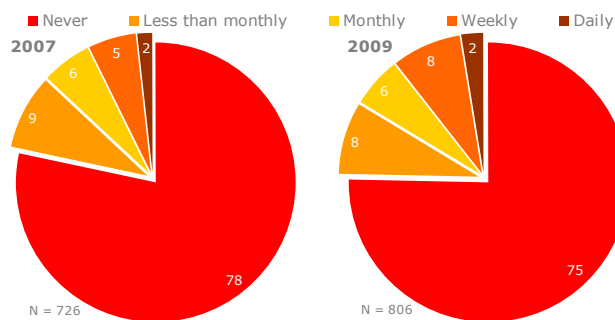
4.8 How often do you listen to a radio station online?

Use of the internet to listen to the radio did not change in the last two years. More than a quarter of users listen to a radio station online (26.6% in 2007 and 28.9% in 2009). Few people listen regularly- only 2.7% of users listened on a daily basis and 8.1% listened weekly.



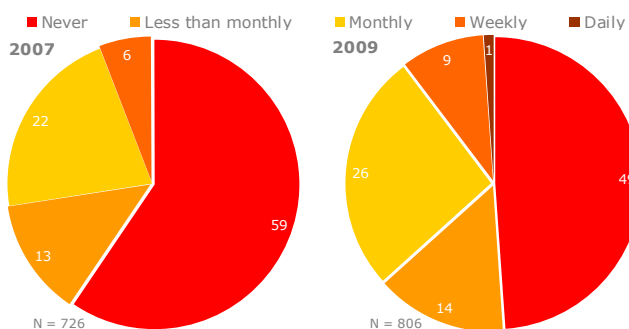
4.9 How often do you bet, gamble or enter sweepstakes on the internet?

Less than one in twenty of our respondents used the internet to gamble in 2007 (4.7%), and this increased only slightly to 7.2% in 2009.



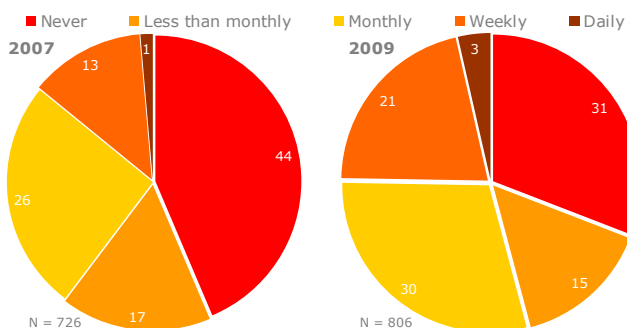
4.10 How often do you look at sites with sexual content?

A quarter of our respondents (24.6% up from 21.6%) report that they look at internet sites with sexual content. More than one in ten (10.5% up from 7.6%) do so on a weekly basis while 2.5% do so daily.



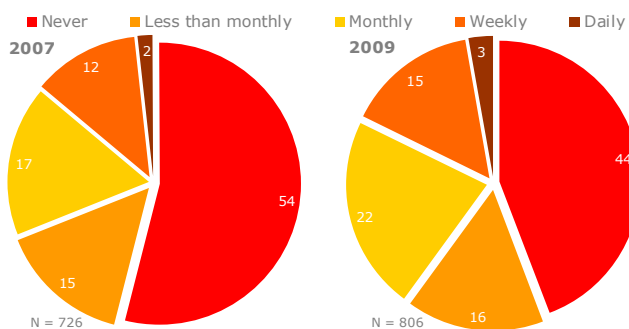
4.11 How often do you look up information about restaurants on the internet?

There was an increase in this activity with just over a half of internet users using the net to look up information about restaurants (51.1% up from 40.6% in 2007). The proportion doing so at least monthly grew from 27.5% to 36.7%.



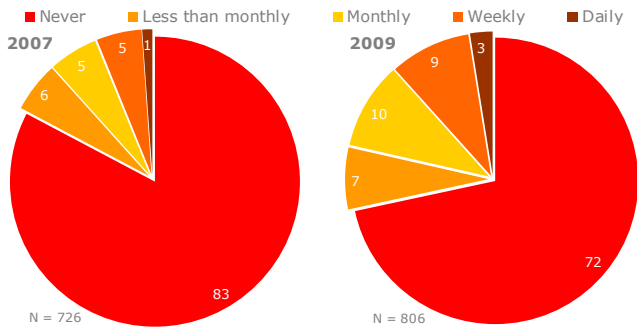
4.12 How often do you find information about food such as recipes?

While over half of our sample had used the internet to look information about food such as recipes in 2007 (56.5%), by 2009 this had grown to more than two-thirds (69.2%). Frequency also increased with nearly a quarter looking at least weekly in 2009 (24.7%) compared to 14.2% in 2007.



4.13 How often do you visit sites dedicated to your favourite artists (eg authors, musicians)?

Just under half of our sample had used the internet to visit a site dedicated to a favourite artist (46.3%) in 2007, while in 2009 well over a half had done so (55.8%). Four in ten were visiting such sites at least monthly in 2009 (40.1%) compared to 31.0% in 2007.

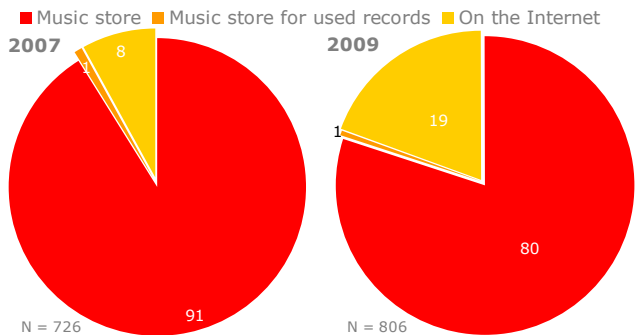


4.14 How often do you download or listen to podcasts?

Downloading or listening to podcasts increased over the last two years from 17.4% of users to 28.4%. A small proportion are regular users, with only 11.6% weekly listeners (6.2% in 2007).

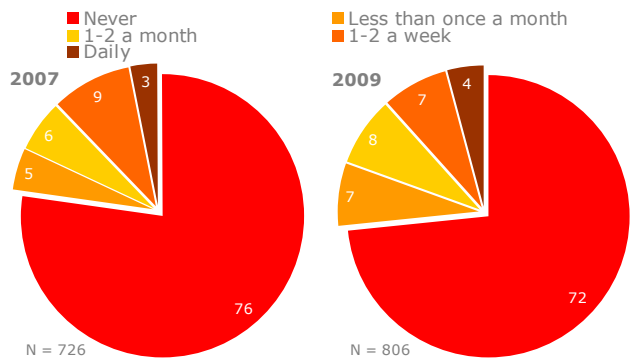
Downloading entertainment

This section presents findings from a series of questions that asked respondents in more detail about their downloading of music, movies and other entertainment.



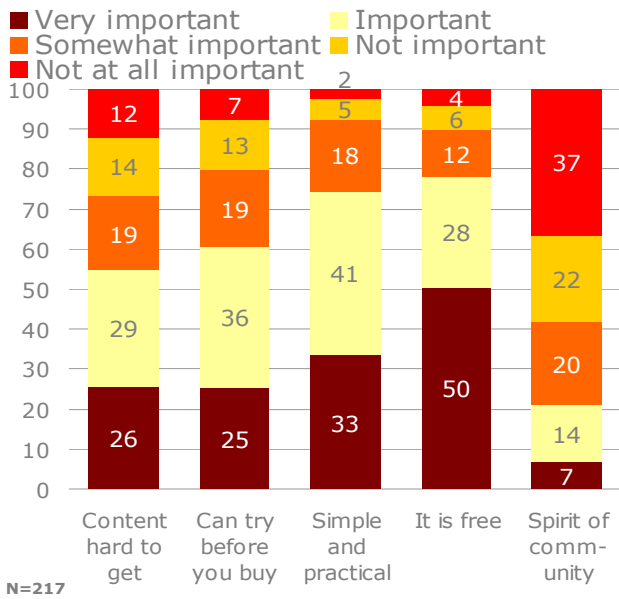
4.15 Where do you usually buy your music?

The proportion of users who usually buy online doubled from 2007 to 2009 (8.1% to 19.3%). The vast majority of internet users still usually buy their music from a 'bricks and mortar' store (80.0%).



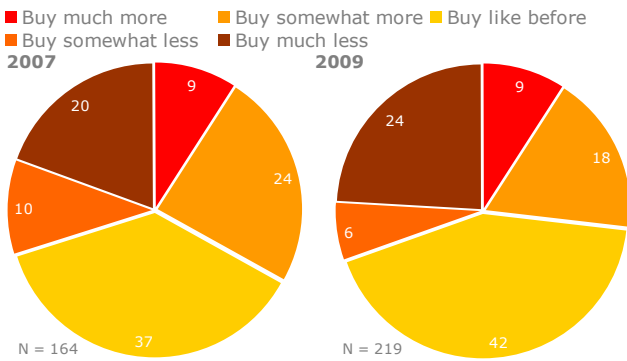
4.16 How often do you use file-sharing services like bitTorrent?

Use of file-sharing services increased very slightly (23.6% to 27.8%). Frequent users of such services actually decreased slightly. In 2007 12.9% used a file-sharing service at least weekly, falling to 12.2% in 2009.



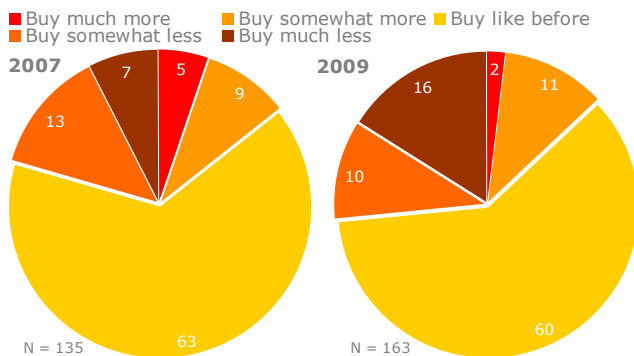
4.17 Why do you use file-sharing services?

There was little change in the most important reasons for using file sharing services, that they are free and simple and practical to use. A half of file sharers said that free content was very important while a third cited 'simple and practical' as very important. Being able to try before you buy (25.2%) and accessing hard to get content (25.7%) were considered very important by a quarter of users. The spirit of community generated by file sharing was not considered important by as many users (6.9% rated it very important and 14.4% as important).



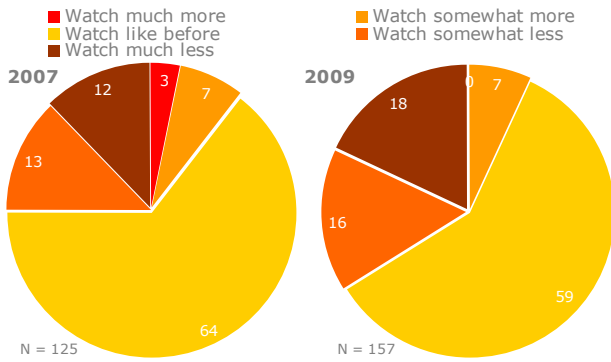
4.18 How has the ability to download music from the internet influenced your purchases of music?

There has not been much change on how people's ability to download music has influenced their purchases of music since 2007. In both periods around three in ten users (29.9% and 30.6% respectively) said that being able to download music had decreased the amount of music they buy. In 2009 nearly a quarter of those (24.2%) five said that it had decreased a lot (19.5% in 2007). The proportion of file shares who said that they now buy more music fell (32.9% to 26.9%) although the proportion who said it had changed 'a lot' stayed the same (9.1%).



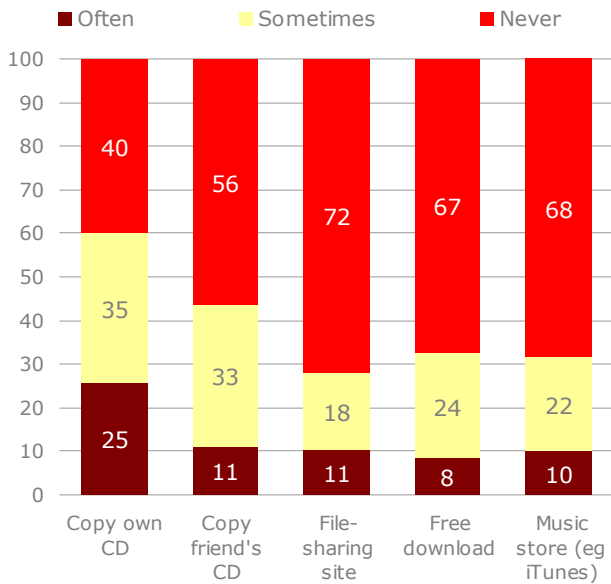
4.19 How has the ability to download movies from the internet influenced your total consumption of movies via purchase from stores, video rental and visits to cinema?

Again there was little change since 2007. Those who download movies on the whole do not think it affects their consumption of movies from 'traditional' sources. In 2009 60.1% said that it had not changed at all (64.9% in 2007). The proportion who felt their consumption had gone down increased from 20.0% to 26.4%.



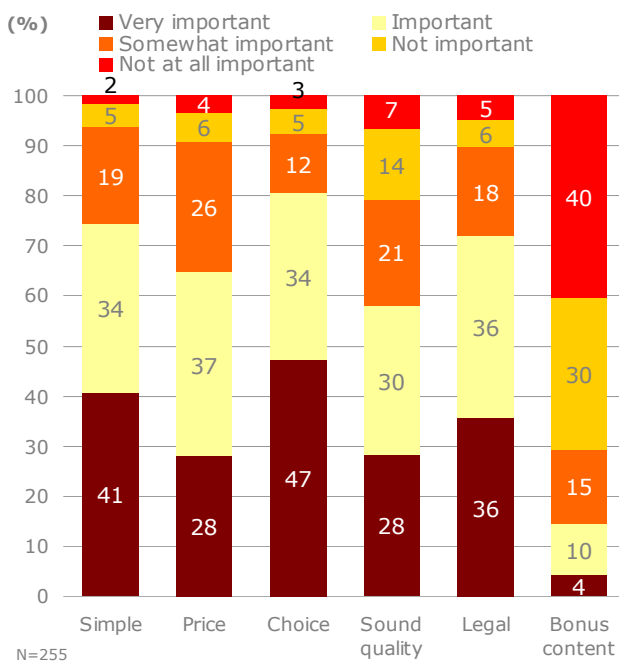
4.20 How has the ability to download television programs from the internet influenced the amount of time you spend watching broadcast television?

The proportion of users who felt that they watched less broadcast television due to being able to download television programs increased from exactly a quarter to just over a third of users (33.8%).



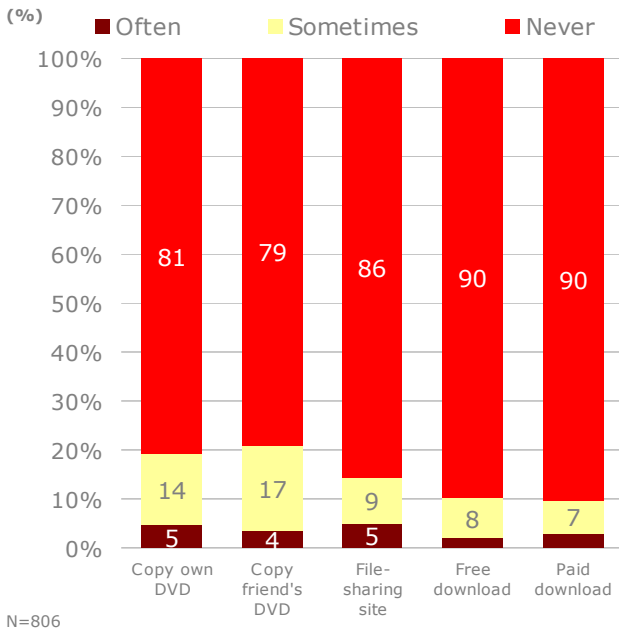
4.21 Where do you get your digital music?

There was little change since our 2007 study in the means by which people obtained their digital music. Copying one's own CDs remains the main way that people get their music in digital form. A quarter of users 'often' get their digital music in this way (25.5%) while a further thirty-five percent do so 'sometimes'. The next most popular source of digital music is copying friend's CDs (10.9% 'often' and 32.8% 'sometimes'). Just under a third of users report downloading for free (32.6%) and 28.2% use a file sharing site. Use of online music store to get digital music grew from 16.8% of users in 2007 to 31.8% in 2009.



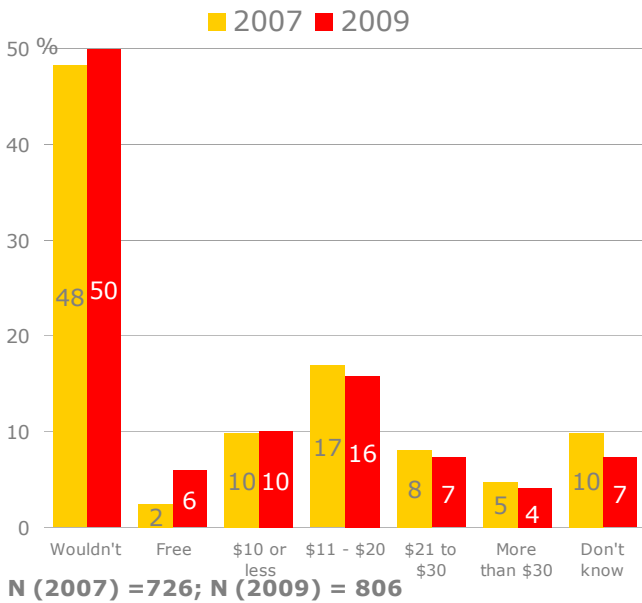
4.22 Why do you use pay services to get music from the internet?

The ranking of these factors remained the same as 2007 but a greater proportion of respondents nominated all of them as either 'very important' or 'important' in their decision to use pay services to get music from the net. Those citing 'choice' increased from 51.6% to 80.6%, 'simple and practical' 50.0% to 74.3%, and the fact that it's legal 50.0% to 71.9%. Nearly two thirds cited 'price' (64.8% up from 42.6%) and 'sound quality' (57.9% up from 41.8%).



4.23 Where do you get your digital movies?

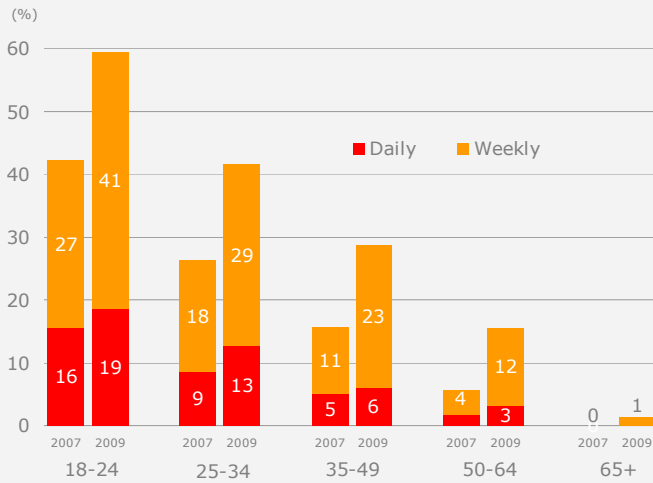
Copying or downloading movies is still a minority activity and there was only a slight increase in these activities. Around one in five people copy their own or a friend's dvd. Purchasing digital movies online exhibited the strongest growth, increasing from 3.0% to 9.6%.



4.24 If a boxed DVD or CD set was on sale for \$40, for what price would you consider downloading a digital copy instead?

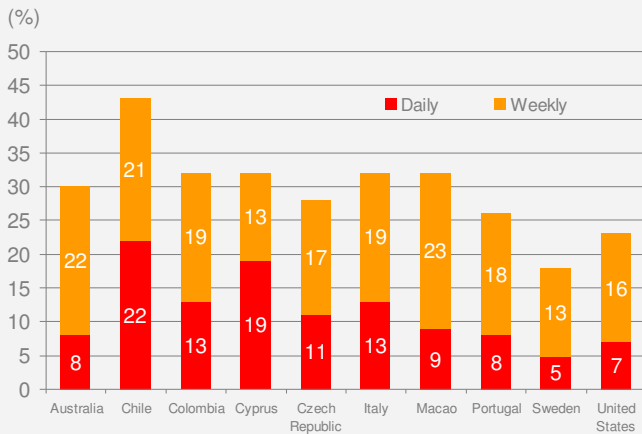
There was little change in people's willingness to substitute 'hard-copy' products for digital, if anything respondents were slightly less willing to purchase digital content. Half of our internet users (49.8% compared to 48.2% in 2007) would not consider downloading music or movies instead of buying hard copy at any price. A further 5.9% would only do so if it was free to download. The average price those who would countenance downloading would be prepared to pay fell from \$20 to \$17, or less than half the price of the off-line version. A small proportion (4.1%) would be prepared to pay more than \$30 or around the same as the off-line version.

Further Analysis



4.25 Downloading or watching movies, TV shows or video clips daily and weekly

Downloading or watching video content online increased for all age groups between 2007 and 2009. In 2009 just less than six in ten young people were undertaking this activity at least weekly (59.3% up from 42.2%). Contrastingly no-one aged 65 or over was doing this weekly in 2007 while a few were in 2009.



4.26 Downloading or watching movies, TV shows or video clips daily and weekly, selected countries

Australia is around mid-level overall for downloading and watching video content although it has a relatively low proportion of users doing so daily. Chile is approaching half of its internet users (43%) downloading or watching weekly while Sweden has only 18%.

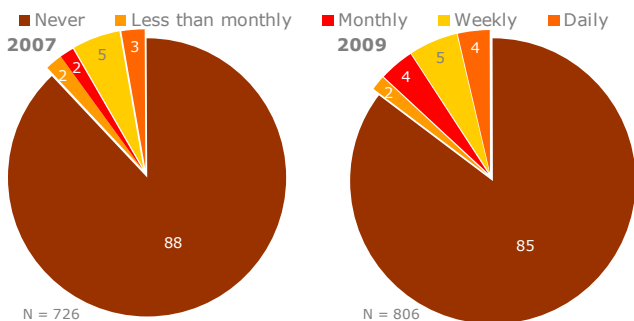
5 Creative uses of the internet

We are interested in people's creative uses of the Internet, and particularly in the role of Internet users as producers of content. What are the characteristics of those people who are producing online content? Is it related to age, gender, experience and skills or speed of access?

There are also a series of further issues we are keen to pursue: the influence here of the diffusion of broadband, and any factors that may be hindering take-up; the effects of internet usage on the consumption of other media; the uptake of social web technology; video usage; news consumption online and how it is changing; and the impact of the 'always on' element of broadband.

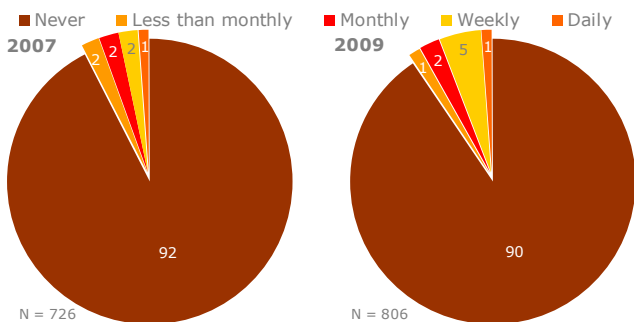
People's creative uses of the net are of interest for two broad and related reasons:

- Creative uses tend to require more skill on the users' part and are an important marker of increasing digital literacy;
- Increasing user-generated content implies that users are gaining more from their online experience and that the resulting increase in online content will also enrich the online experience of others.



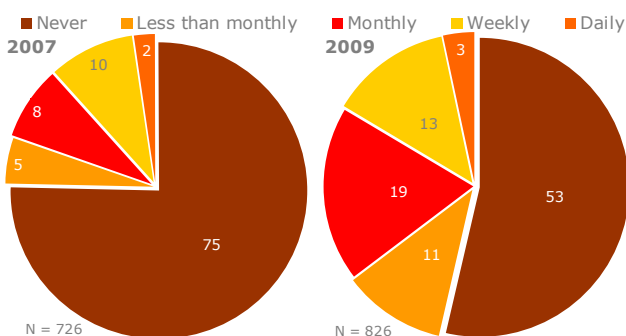
5.1 How often do you work on a personal website?

There was little change in the proportions of people who keep a personal website. In 2009 14.8% had a website and two thirds of these people (10.0%) update their site at least once a week.



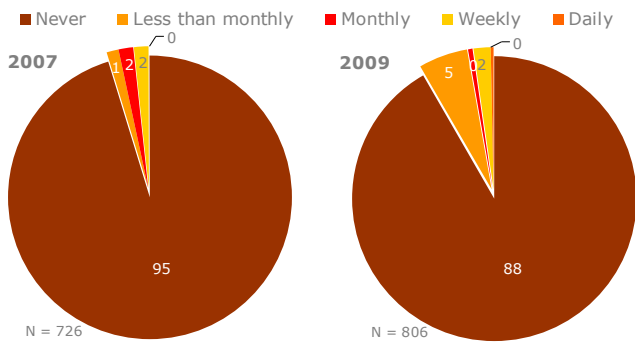
5.2 How often do you work on your blog?

A smaller proportion of our sample kept a blog. In 2009 less than one in ten did so (9.7%) and just over half of these people (5.8% of all users) updated it more than once a week.



5.3 How often do you post pictures or photos?

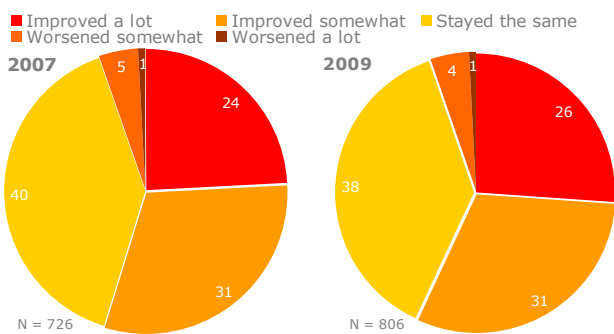
There was an increase in people posting pictures and photographs from just under a quarter of users in 2007 (24.8%) to nearly a half (46.5%) in 2009. In 2009 16.3% of users were posting weekly or more often (11.7% in 2007).



5.4 How often do you post videos?

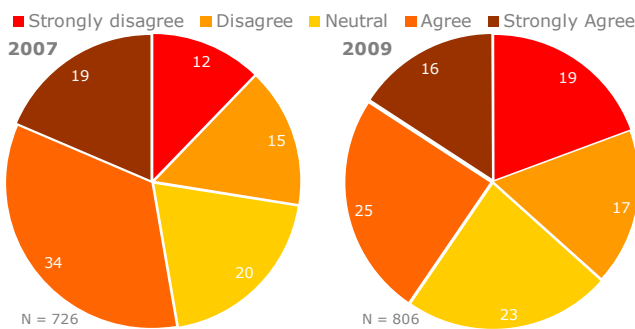
The proportion of users posting videos online increased from 4.8% to 11.7%. Of these people, around a third (1.8% of total users) post videos weekly, while a further 1.7% of users do so monthly.

Attitudes to the impact of the internet on respondents' creativity and productivity



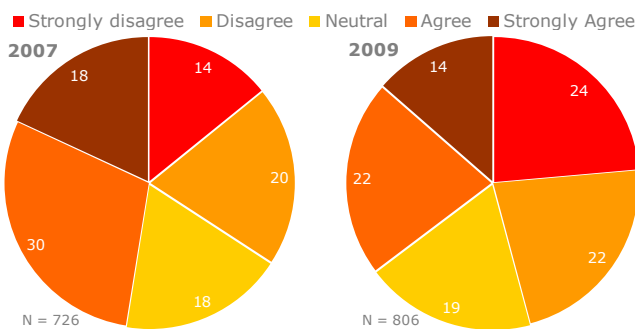
5.5 How do you feel your Internet access has affected your work performance/productivity?

There was very little change between 2007 and 2009- respondents on the whole are positive regarding the effect of internet use on their productivity. In both years more than half of users felt that internet access had either improved their productivity a lot (26.1% in 2009) or somewhat (30.8% in 2009). Just over five percent felt the internet had negatively influenced their productivity (5.2%).



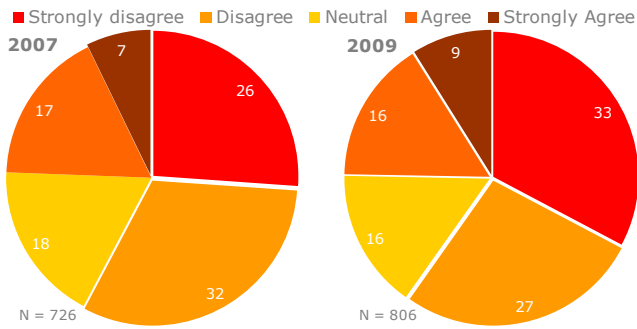
5.6 The internet enables me to share creative work I like with others

Respondents were less positive about the use of the internet for creative purposes in 2009. In 2007 a majority of internet users agreed that the internet enabled them to share creative work they liked with others (52.7%) but this fell to 40.7% in 2009. Conversely in 2007 just over a quarter of users disagreed with this contention (27.4%) while in 2009 this figure was 40.7%.



5.7 The internet enables me to share my own creative work with others

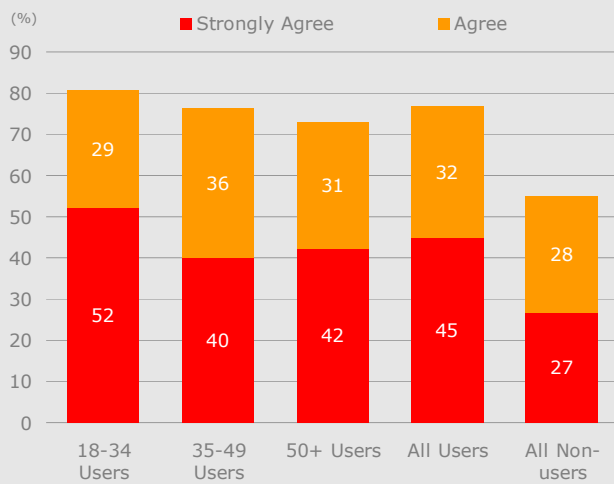
In 2009 35.4% of users agreed that access had enabled them to share their own creative work with others, down from 47.5% in 2007. Just under a half of users in 2009 disagreed (45.8% to 34.1% in 2007).



5.8 The internet has encouraged me to produce my own creative work and share it with others

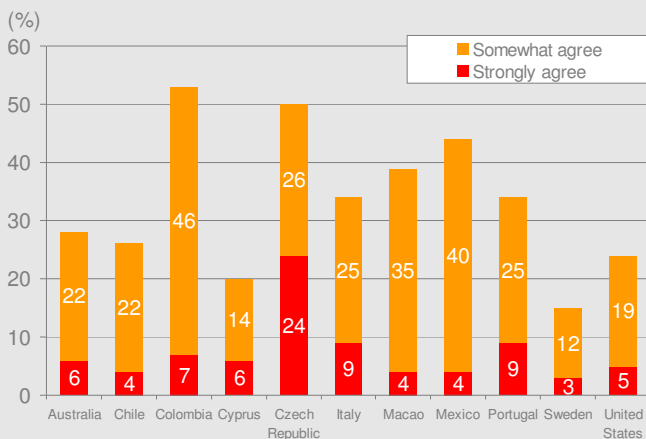
In the final question of this series we asked whether internet access had actually encouraged the respondent to *create* their own work and share it. A majority of respondents disagreed with the proposition in both years although there was not as big of a difference as for the previous two questions (59.6% in 2009 and 57.7% in 2007). In both years nearly a quarter of respondents agreed. Given the strength of the proposition this indicates that the internet has played a positive role in encouraging creative pursuits.

Further Analysis



5.9 Do you think that the development of a National Broadband Network is a good idea by age and internet status

Agreeing with this statement is strongly related to internet use. Nearly a half of users (45.0%) agree strongly with the idea compared to only 26.8% of non-users. Amongst users age has a slight impact on likelihood of agreeing with 80.6% of those aged 18-34 agreeing, 76.2% of 35-49 and 73.1% of those aged 50 or more.

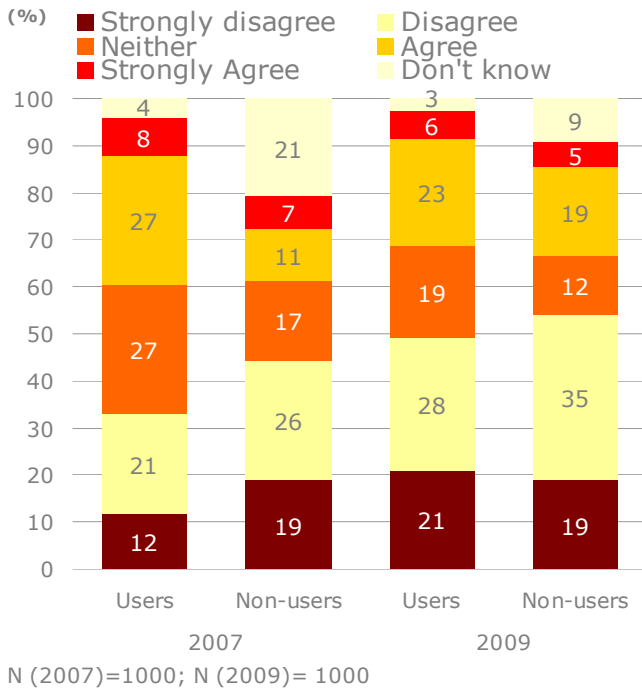


5.10 By using the internet people like you can have more say about what the government does, selected countries

There was a large degree of variation in response to this proposition across the various countries, Just over a half of Colombians agreed while exactly a half of those in the Czech Republic agreed. At the other end of the scale only 15% of Swedes and 20% of Cypriots agreed. In Australia 28% agreed putting us around the middle.

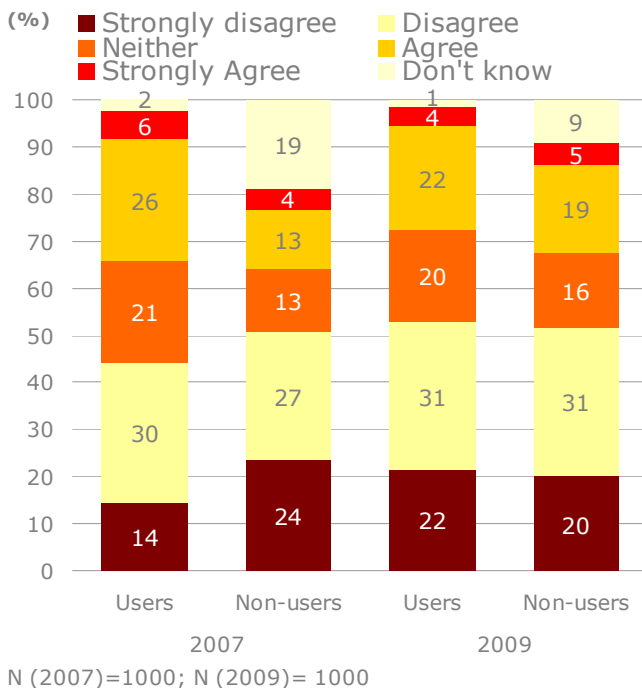
6 Internet politics and policy

We asked a series of questions about peoples' attitudes to the internet and politics, and the broad issues of contemporary internet policy and regulation. In general, non-users were more sceptical than users about the internet's capacity to empower citizens. Perhaps more importantly, a sizeable proportion of non-users said they didn't know what impact the internet was having on politics and the role of citizens. Respondents generally for the National Broadband network and the regulation of the Net.



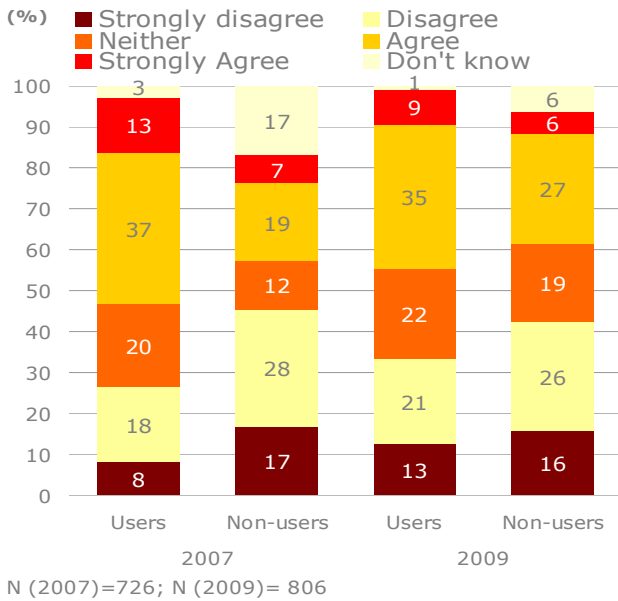
6.1 By using the Internet people like you can have more political power

Both users and non-users were generally sceptical that internet use could give you more political power. Between 2007 and 2009, users in particular became more skeptical. While in 2007 a third of users (32.2%) disagreed that the internet could give you more political power, in 2009 just under a half of users disagreed. Overall the difference between users and non-users on this question narrowed over the two years.



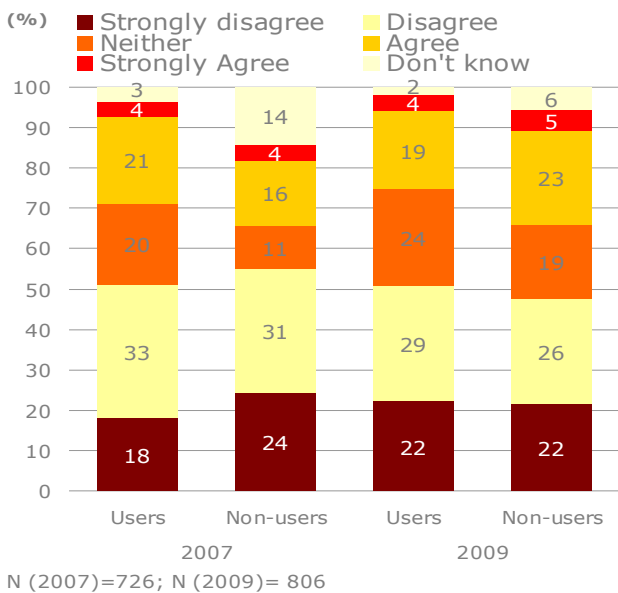
6.2 By using the Internet people like you will have more say about what the government does

In 2007 just under a third of users agreed that the internet can give users more say about what government does (31.8%) with 17.2% of non-users agreeing with this proposition. In 2009 fewer users agreed (25.9%) while more non-users agreed (23.2%). The proportion of non-users who said they didn't know fell from 19.0% to 9.3%.



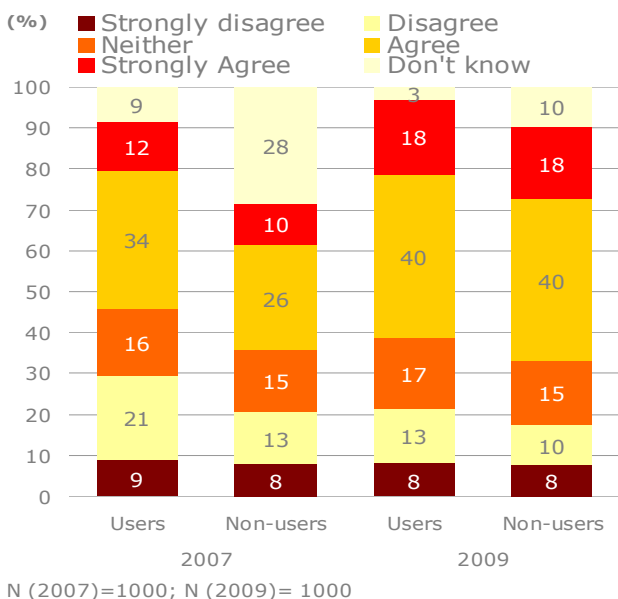
6.3 By using the Internet people like you can better understand politics

The pattern for this question was similar, in 2009 users were less likely to agree (50.3% in 2007 and 43.7% in 2009 while non-users were more likely (25.9% and 32.5% respectively). Again fewer non-users said they 'didn't know' (16.8% to 6.2%).



6.4 By using the Internet public officials will care more what people like you think

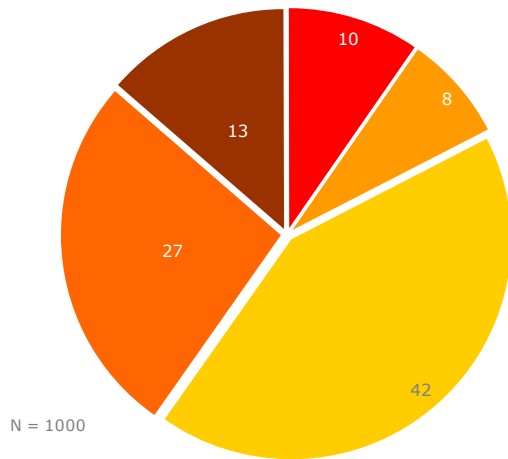
There was not such a large difference between users and non-users on the impact of the internet on how much public officials care about what people think in 2007 and there was not a lot of change in 2009. Both were equally sceptical of this notion in 2007 with a quarter of users and a fifth of non-users agreeing with this statement. In 2009 non-users were more likely to agree than users (28.4% to 20.1%).



6.5 The Internet has become important for the political campaign process

The final statement in the series was the only one in which users agreement increased in the last two years. In 2007 45.6% of users agreed that the internet had become important of the political campaign process while in 2009 this had increased to 58.3% Agreement by non-users increased even more markedly from 35.8% to 57.2% and the high proportion of non-users who said they didn't know decreased from 28.5% to 9.8%.

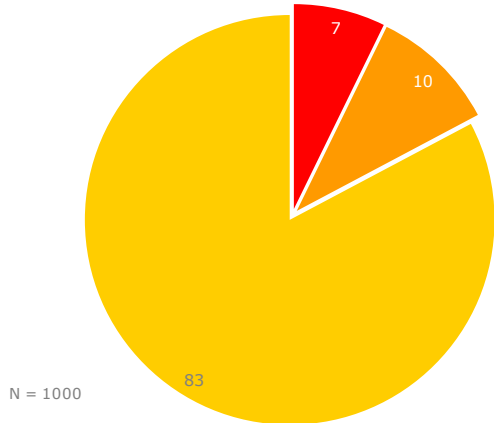
■ Far less ■ Less ■ No more no less ■ More ■ Far more



6.6 How much should the government regulate the internet?

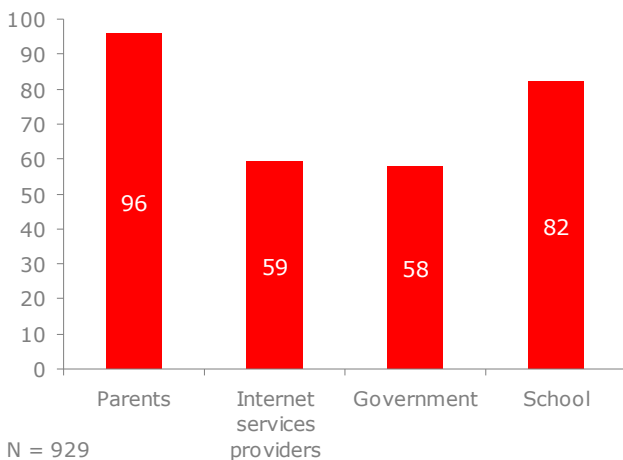
The majority of Australians do not think that the internet is over-regulated. Just over four in ten (42.3%) think that the current amount of regulation is about right. A further four in ten (40.3%) would like more regulation and of these a third (13.5% overall) would like far more regulation. On the other side, 17.3% would like to see less regulation.

■ Definitely no restrictions
 ■ There should be very few restrictions
 ■ There should be some restrictions



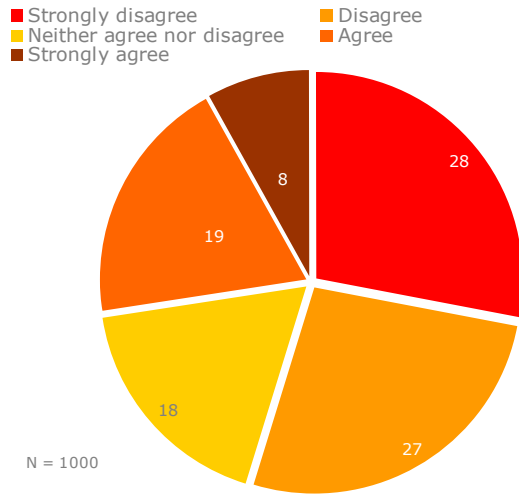
6.7 Should children's content on the internet be restricted?

There is very strong support for restricting children's content on the internet. An overwhelming 82.8% felt there should be some restrictions with 9.9% calling for 'very few restrictions' and 7.3% saying there should be no restrictions.



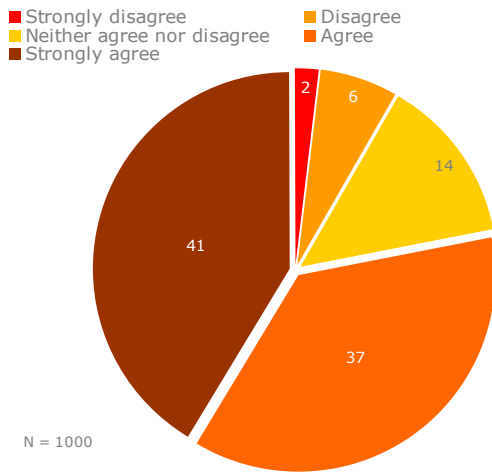
6.8 Who should be responsible for restricting children's content

Almost all those who believe that children's content online should be restricted think that parents should be responsible. Eight in ten believe that schools have a role while slightly less than six in ten believe that internet service providers and government should take responsibility.



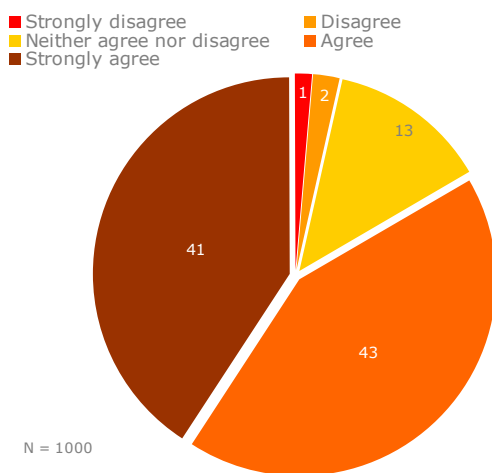
6.9 People should be careful what they say about politics on the internet

Most Australians believe that people do not need to be careful what they say about politics on the internet. Overall 54.6% disagree with this statement, split evenly between those who 'strongly disagree' and those that 'disagree'. Less than one in ten 'strongly agree' with this statement while a further one in five (19.3%) agree.



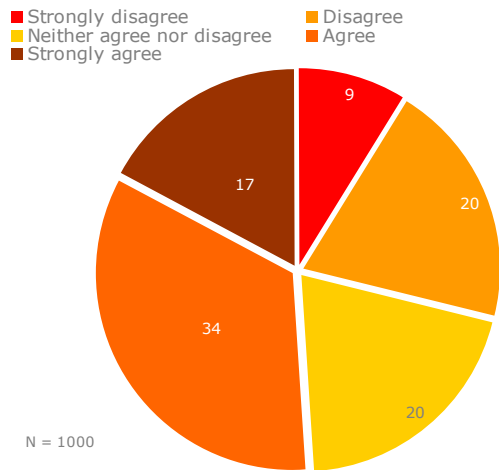
6.10 People should be free to criticize their government on the internet

Australians overwhelmingly agree with this statement. More than four in ten strongly agree while a further 36.7% agree. Less than one in ten (8.3%) disagree.



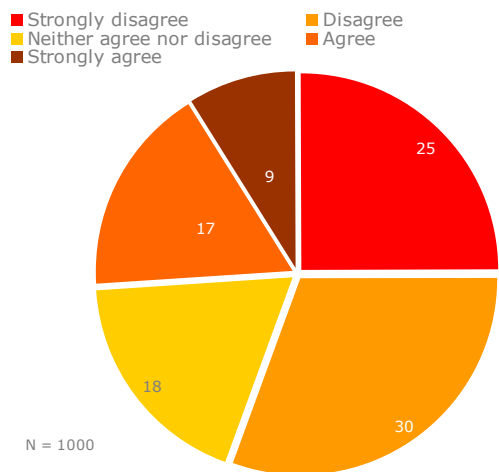
6.11 People should have the right to express their opinion on the internet

There was almost no disagreement with this contention. More than four in five Australians agreed (83.2%) with 3.7% disagreeing.



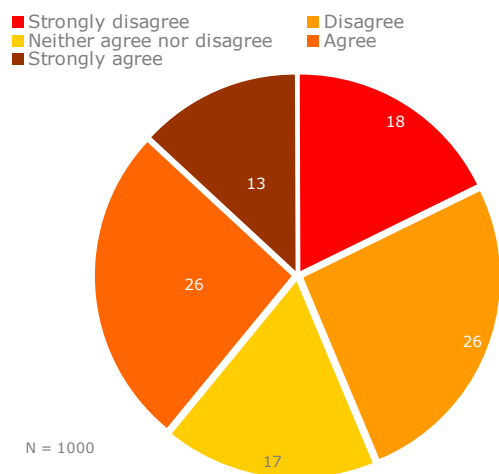
6.12 It is okay for people to express their ideas on the internet even if they are extreme

This statement attracted a greater level of disagreement than the previous but still over half of our sample agreed (51.2%). Just under one in ten strongly disagreed (9.0%) with a further one in five (19.9%) disagreeing.



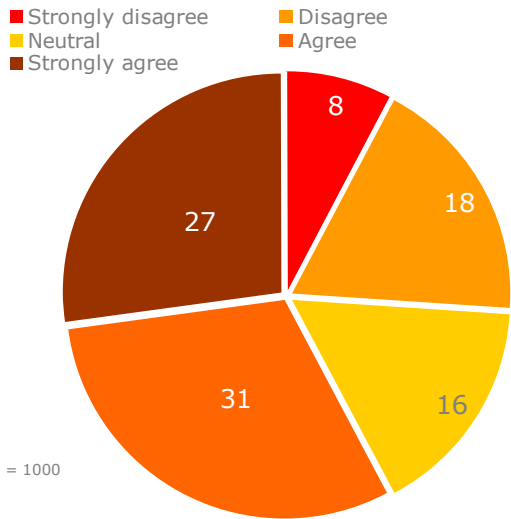
6.13 I am worried about the government checking what I do online.

There was some concern expressed about the government checking what people are doing online. Over a quarter of people were concerned (26.1%), with 8.8% strongly agreeing with this statement. A majority of people however were not concerned (55.4%).



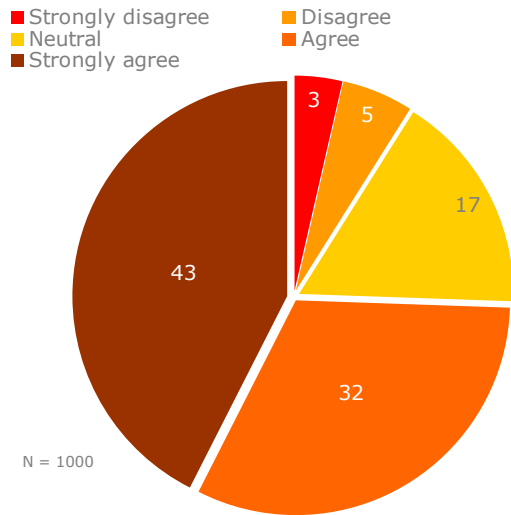
6.14 I am worried that my email messages might be read by people who are not supposed to see them.

Nearly two in five Australians are concerned that their email messages may be read by people who are not supposed to see them (39.3%). A slightly higher proportion were not concerned (43.6%).



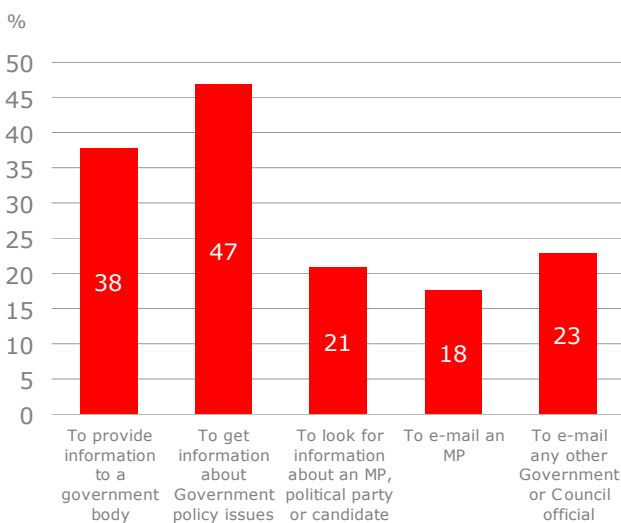
6.15 The Australian government should allocate funds to enable all Australians to have access to internet services

A clear majority of Australians agree with this contention (57.9%). Slightly more than a quarter disagree (26.1%) and of these less than one in ten (7.8%) disagree strongly.



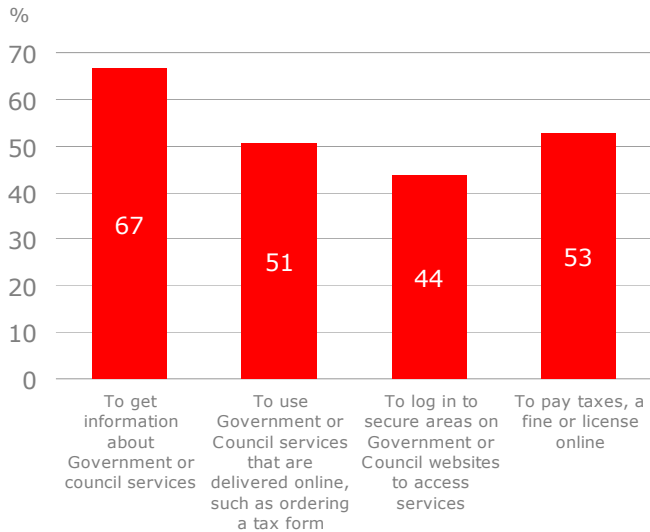
6.16 Do you think that the development of a National Broadband Network is a good idea?

There is wide agreement that the development of the NBN is a good idea. Just under three-quarters of Australians think that it is a good idea (74.5%) and more than four in ten 'strongly agree' with the idea (42.6%). Less than one in ten disagree that it is a good idea (8.9%).



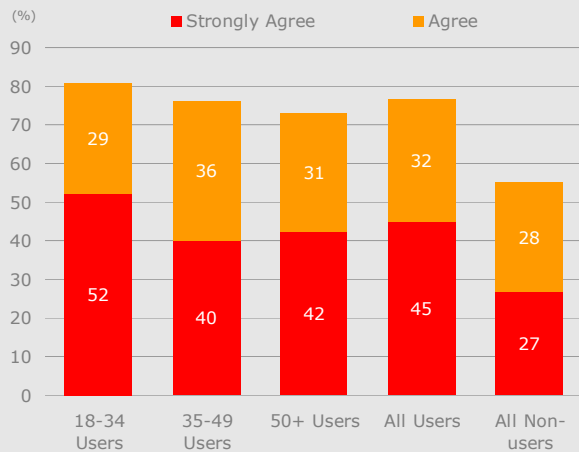
6.17 Political uses of the internet

Nearly half of our sample of internet users had used the internet to get information about government policy issues while almost four in ten (37.8%) had provided information to a government body via the net. Around one in five had used email to contact a government official (22.8%), to contact an MP (17.6%) and to look for information about an MP, party or candidate (20.9%).



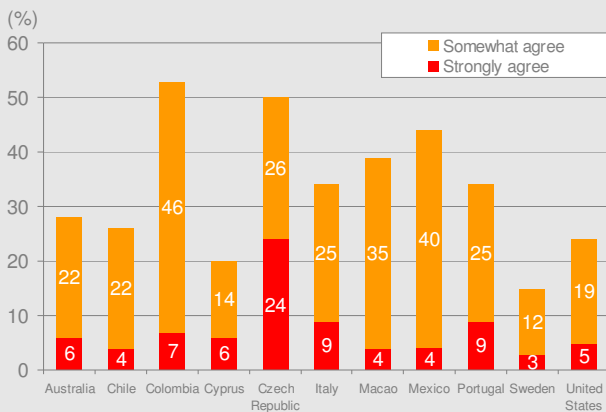
N= 806

Further Analysis



6.19 Do you think that the development of a National Broadband Network is a good idea by age and internet status

Agreeing with this statement is strongly related to internet use. Nearly a half of users (45.0%) agree strongly with the idea compared to only 26.8% of non-users. Amongst users age has a slight impact on likelihood of agreeing with 80.6% of those aged 18-34 agreeing, 76.2% of 35-49 and 73.1% of those aged 50 or more.



6.20 By using the internet people like you can have more say about what the government does, selected countries

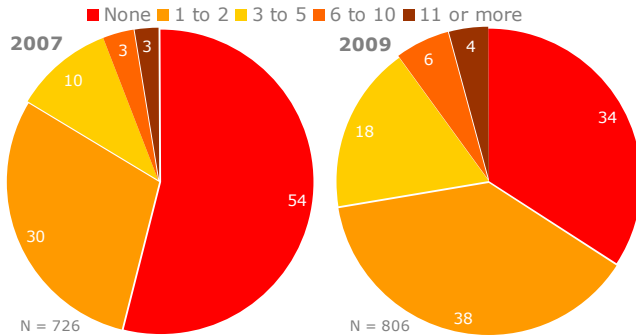
There was a large degree of variation in response to this proposition across the various countries, Just over a half of Colombians agreed while exactly a half of those in the Czech Republic agreed. At the other end of the scale only 15% of Swedes and 20% of Cypriots agreed. In Australia 28% agreed putting us around the middle.

7 The internet and commerce

From the Web's early days, there has been much speculation and interest in commercial and retail applications. Many books have been written on strategies to maximise online sales; and Amazon and ebay are spectacular success stories. This section presents our findings on consumer activity online and peoples' perceptions of online transactions.

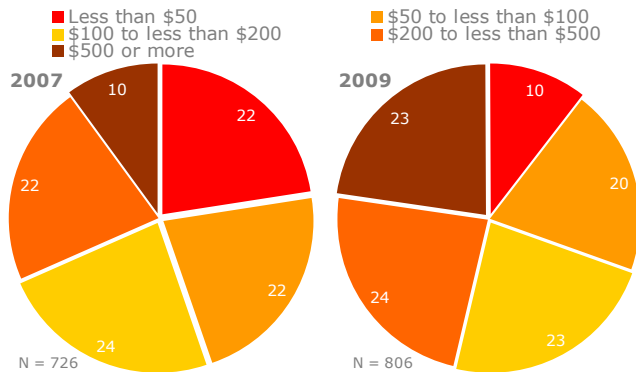
How much?

This section looks at the extent of online commerce amongst our respondents.



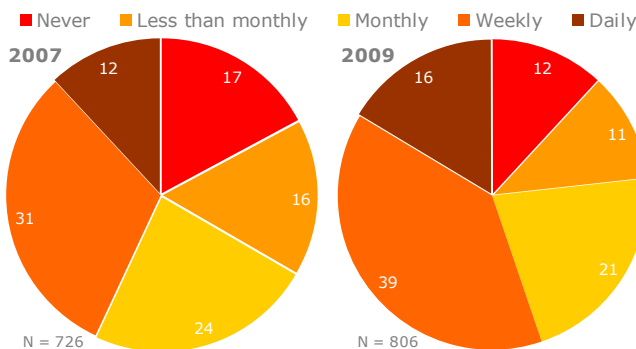
7.1 In an average month, how many times do you purchase products or services over the Internet?

There has been an increase in online purchasing over the last two years. Whereas in 2007 just under half of our sample (46.2%) used the internet to make purchases, by 2009 it was around two thirds (65.8%). The increase in those purchasing was spread across all the frequency categories.



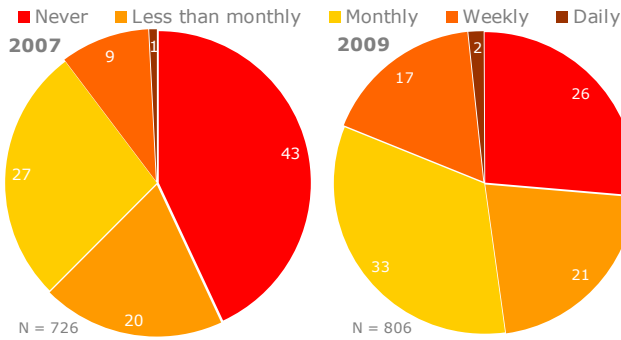
7.2 In an average month, how much do you spend on products or services purchased over the Internet?

Expenditure on products bought online showed steady growth between 2007 and 2009. The proportion of users spending more than \$500 a month more than doubled (9.6% to 22.6%) while at the other end of the spectrum those spending less \$50 a month more than halved (22.4% down to 10.5%).



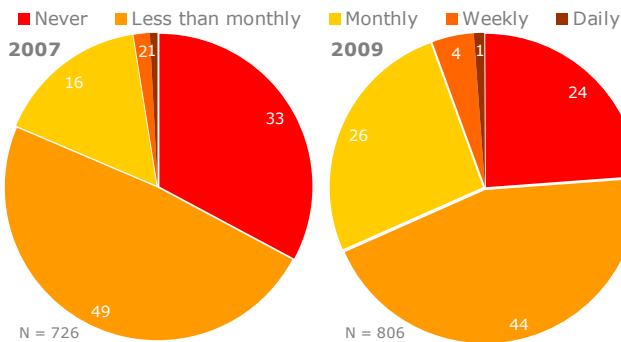
7.3 How often do you use the internet to get information about products?

The vast majority of users use the internet to research products. This proportion increased slightly from 82.9% to 88.0%. Those researching product information on a daily basis increased from 12.0% to 16.4% while the proportion researching weekly increased from 31% to 38.9%.



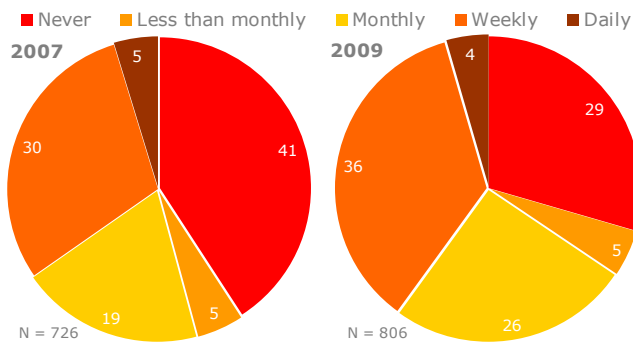
7.4 How often do you buy products online?

The proportion of users who never buy products online dropped from more than four in ten users (43%) to a little over a quarter (26.5%). The proportion shopping online at least weekly nearly doubled from 10.4% to 18.8%.



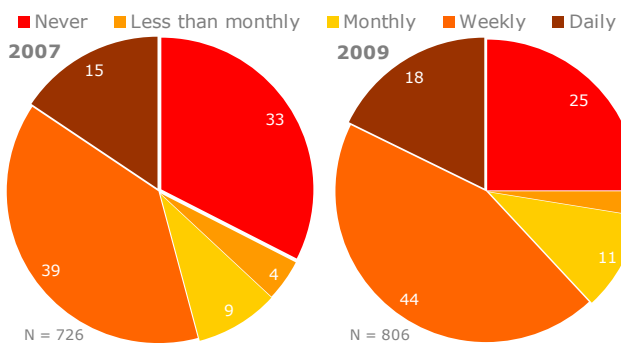
7.5 How often do you make travel reservations/bookings online?

While in 2007 two-thirds of users made travel bookings online, in 2009 just over three quarters did (76.1%). More people were regularly making bookings with those doing so monthly or more often increasing from 18.7% to almost a third (31.3%).



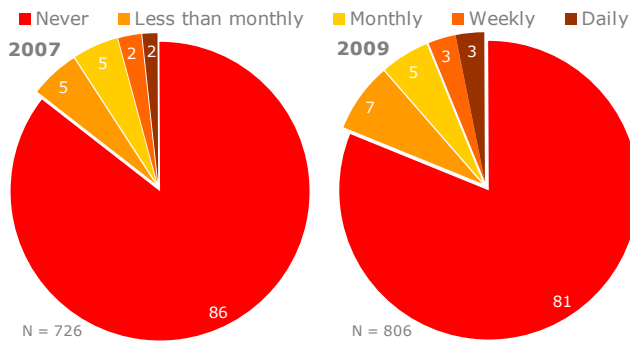
7.6 How often do you pay bills online?

The proportion of users paying bills online increased from 59.2% to 71.6%. This increase was mostly for those doing so monthly (19.4% to 25.6%) with a smaller increase in the proportion paying weekly (30.0% to 35.5%).



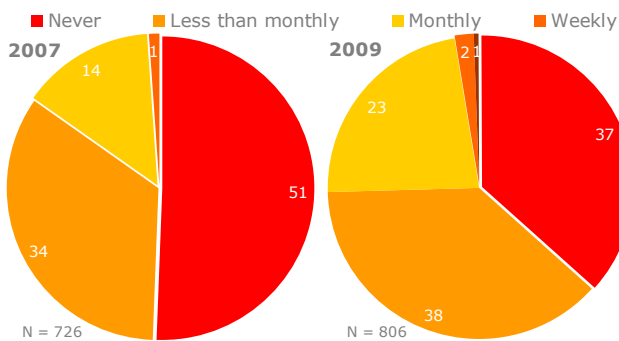
7.7 How often do you use your bank's online services?

In 2007 two thirds of users banked online. By 2009 this had increased to three-quarters. The proportion of internet users banking online at least weekly increased from just under four in ten (38.7%) to just over six in ten (61.3%).



7.8 How often do you invest in stocks/funds/bonds online

The majority of users do not invest online and this did not change significantly in the last two years (85.5% in 2007, 81.2% in 2009). A significant minority are investing weekly or even daily (6.2% in 2009) with 5.1% making online investments monthly.

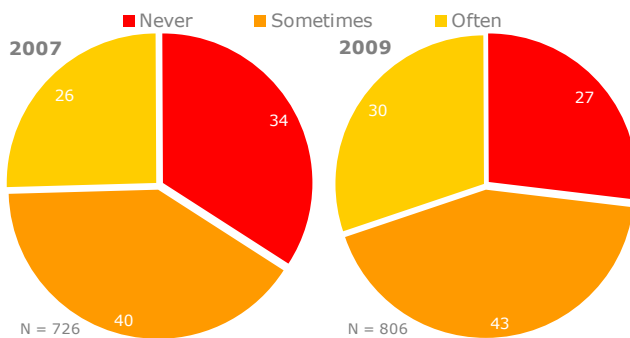


7.9 How often do you purchase event tickets online?

A greater proportion of internet users were purchasing event tickets online in 2009. In 2007 just under half of internet users did so (49.4%) while in 2009 this figure was almost two thirds (63.4%). Those purchasing at least weekly increased from 15.3% to 25.6%.

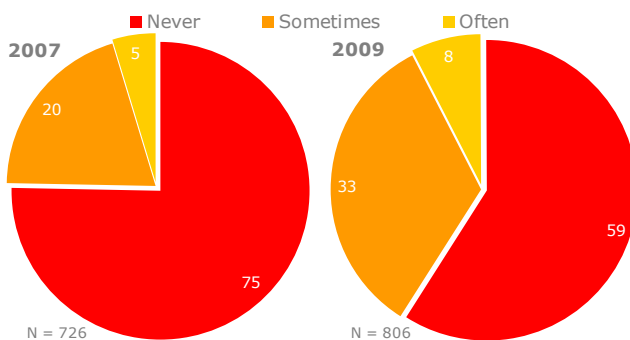
Tactics

This section examines the interaction between online and off-line purchasing.



7.10 How often do you look at goods on the Internet but when it comes time to buy, you purchase from local stores?

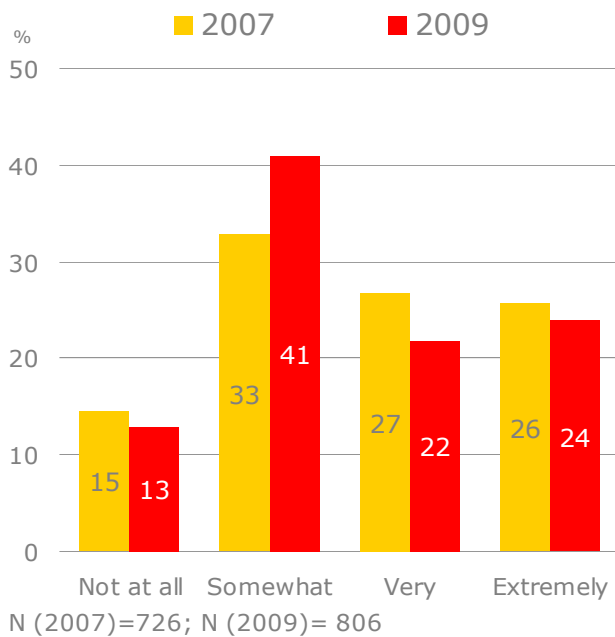
There was a small increase in people researching online but buying offline. In 2007 almost two thirds of our sample had done this (65.1%) while in 2009 it was close to three quarters (73.1%).



7.11 How often do you look at goods in local stores but when it comes time to buy, you purchase online?

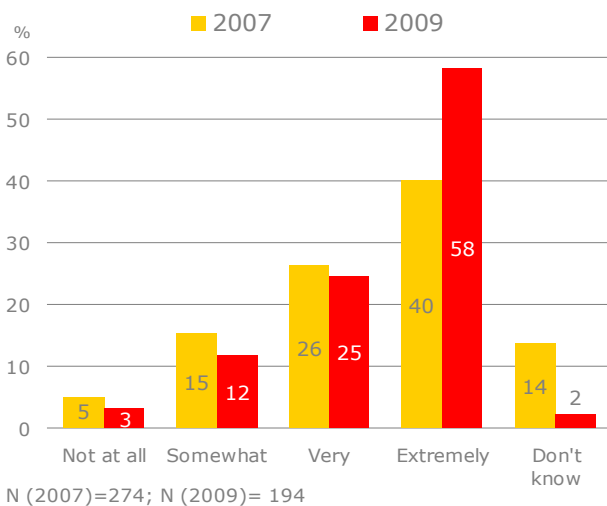
People were much more likely in 2009 to do the reverse, ie research offline and buy online. In 2007 only a quarter of our users reported doing this, but by 2009 this figure had grown to 41.0%.

Concerns about internet security



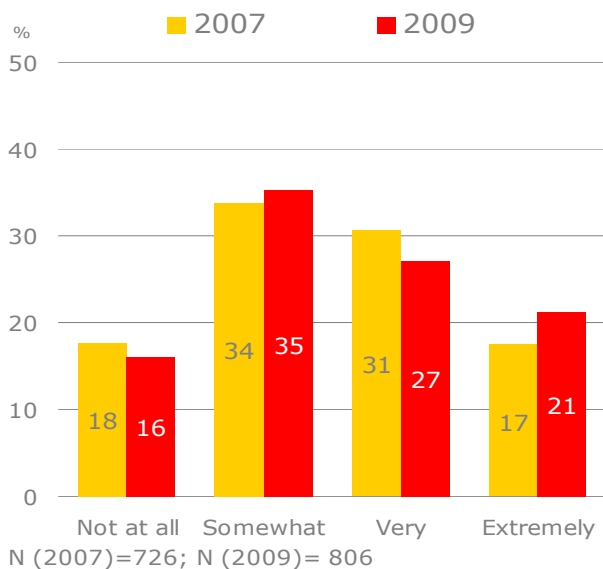
7.12 Internet Users: How concerned would you be about the security of your credit or bank card information if you bought something online?

Users are slightly less concerned about their credit card information if buying online but overall the difference is marginal.



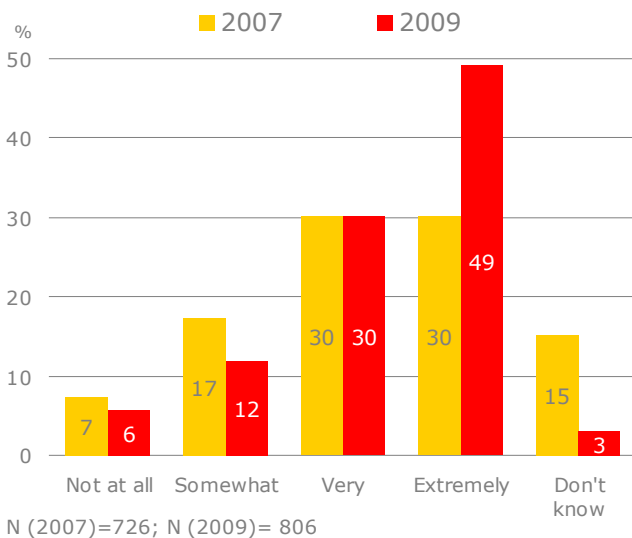
7.13 Internet Non-Users: How concerned would you be about the security of your credit or bank card information if you bought something online?

Unlike users, concern amongst non-users about credit card security increased strongly in the last two years. The proportion saying 'don't know' dropped markedly from 13.7% to 2.1% while those who would be 'extremely concerned' went from four in ten to nearly six in ten (39.9% to 58.3%). The difference between users and non-users was much more marked in 2009.



7.14 Internet Users- If you bought something online, how concerned would you be about the privacy of your personal information such as name and address, phone number, purchasing habits?

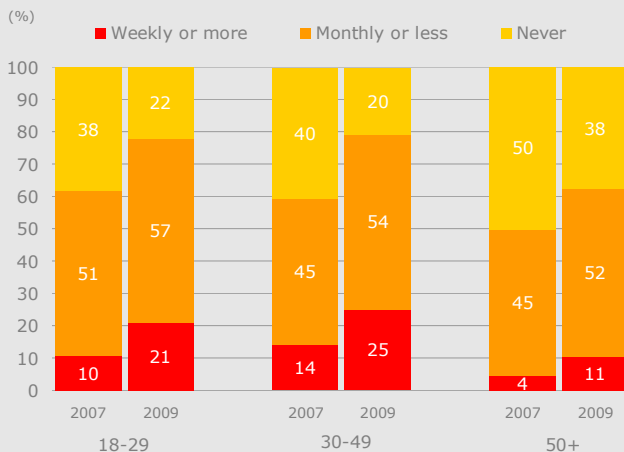
There was very little change in users' concerns about online privacy. Most people were either 'somewhat' or 'very' concerned.



7.15 Internet Non-Users- If you bought something online, how concerned would you be about the privacy of your personal information such as name and address, phone number, purchasing habits?

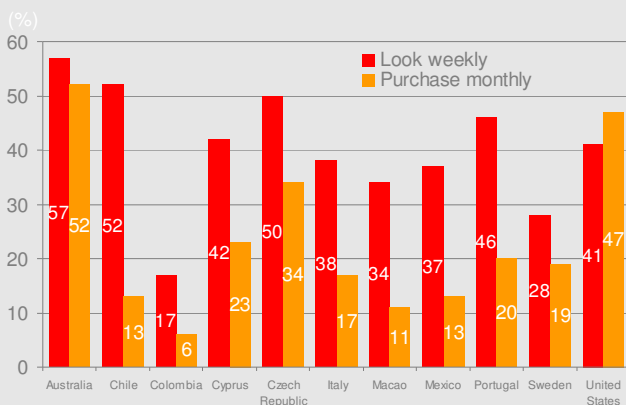
Unlike users, non-users were much more concerned in 2009 about online privacy issues. Nearly half of our non-users (49.2%) were extremely concerned, up from less than a third in 2007 (30.1%).

Further Analysis



7.16 Purchasing goods online by age, 2007 and 2009

In relation to purchasing goods the pattern over time is remarkably consistent. A quite large increase in the proportion purchasing frequently, a slight increase in the proportion purchasing occasionally and a drop in those who never purchase.



6.17 Looking for and purchasing goods online, selected countries

Australia is at the forefront of online commerce. Amongst our comparison countries Australia had the highest proportion of the population looking for product information at least weekly and the highest proportion purchasing at least monthly online.

Appendix 1

Background to the World Internet Project

The first report produced by what has become the World Internet Project was the work of a group of researchers based at the University of California at Los Angeles. The UCLA study team set out their guiding objective as follows:

Our goal is to explore how the Internet influences social, political, cultural, and economic behavior and ideas, as measured by the attitudes, values, and perceptions of both Internet users and non-users.

They went on to outline how they thought their work could contribute:

We hope our findings about the Internet will have broad implications for government policymaking, corporate planning, and social and cultural study. To begin this project now is critical if we hope to fully understand the Internet as it evolves. Had this type of research been conducted on the evolution of television as it emerged in the late 1940s, the information would have provided policy makers, the media, and ultimately historians with invaluable insights about how broadcasting has changed the world.

The first report produced by the US partners was concerned with a number of emerging questions around the social, economic, political and cultural dynamics of the Internet. Who was online, who was not, what were users doing online? How was the Net changing patterns of media consumption, consumer behaviour, and communication patterns? What social and psychological effects were apparent?

From its beginnings, the main research activity of the project has been a sample survey of internet users and non-users. The survey is administered in different ways by the different partners. Most partners undertake the survey by telephone with a significant minority opting for face to face interviews. Samples are collected on various bases, with some partners choosing cluster samples and some engaging in stratification to make sure that their sample reflects the population on key variables. Sample sizes range from 900 respondents to 4,000. In addition the minimum age of respondents varies from 12 up to 18 years.

Given the range of countries involved in the collaboration there are significant differences in the stage of internet development. There are large differences in internet penetration and the prevailing forms of access. For example in many countries public access points are becoming increasingly less important while in developing countries public access points are still the main means for people to access the internet.

A related issue is that of broadband take-up. This is becoming the key issue in many countries in which the internet is a 'mature' technology, but there is no consensus regarding what constitutes broadband and this definitional problem is exacerbated when looking across countries. Similarly the evolution of the internet has varied between countries in terms of technologies adopted.

Public policy framing of internet development also varies between the partner countries. Regulating the perceived negative effects of the internet is given more emphasis in some jurisdictions while others are more interested in the economic benefits of the net.

Just as importantly for a project such as this, there is great variation in the amount and type of research conducted on internet use and its impact in the various partner countries. In the US for example, the *Pew Internet and American Life* project, commenced in 1999, is a major ongoing survey-based project examining the internet and its impact on households and communities. In Australia, however, research on the social impact of the internet has been piecemeal at best. While there are many surveys that have been conducted on internet use and non-use in various countries, the World Internet Project is the only

attempt to undertake coordinated survey work across countries. The combination of longitudinal data and international comparison makes this project extremely useful for identifying and tracking trends.

In the United States there has been a lot of survey research concentrating on the diffusion of new technologies. The Department of Commerce's *Falling Through the Net* project, begun in 1995 and then rebadged as *A Nation Online*, is the best example of this type of research. It began in response to concerns about the digital divide more generally and is now focused on the issue of broadband diffusion. The research includes some limited consideration of uses of the internet by individuals and households but does not investigate 'social impact' in any detailed way. In this research the positive effect of the internet is assumed.

The Pew Internet and American Life Project is a more ambitious and larger project that aims to 'explore the impact of the Internet on families, communities, work and home, daily life, education, health care, and civic and political life.' This project is a series of thematically linked investigations of the impact of the internet. Recent reports have included a study of bloggers and online banking. In contrast to the US World Internet Project this approach enables more detailed investigation of particular issues and uses but doesn't provide as clear an overview. The focused nature of these surveys doesn't facilitate the investigation of the relationship between various online (and off-line) activities and uses.

All partners in the WIP have their own funding source although the US partner in particular has played a key role in advising new partners and meeting with prospective funders. Another challenge to the development of the project has been in developing a consistent approach for partners with greatly varying funding arrangements both in terms of quantum and funding mix. This year will see the first international report published out of the project that will include data on a dozen countries.

Appendix 2

About CCI

The ARC Centre of Excellence for Creative Industries and Innovation (CCI) was established in 2005 to focus research and development on the contribution that the creative industries and their contributing disciplines can make to a more dynamic and inclusive innovation system.

Funded by the Australian Research Council from 2005-13, CCI is acknowledged as a global leader in this emerging field. It is a broadly-based, cross-disciplinary, internationally focused Centre embracing both fundamental theoretical and highly applied research in media, cultural and communication studies, law, education, economics and business and information technology, addressing key problems and opportunities arising for Australia, the Asian region, and for the wider world, from innovation in both the creative economy and the broader service economy. It addresses the nature of the field as rapidly-moving and internationally-focused, with extensive research links and international nodes established or planned in Britain, Singapore and China.

The Centre plays a significant role in theoretical and strategic debates with academic, policy, and industry interlocutors, as well as working extensively on new empirical and technical methodologies, including, for example, the creation of new statistical approaches to measuring the creative economy, new software solutions for creative enterprise, and ethnographic action research.

The Centre gratefully acknowledges the support of the Australian Research Council in providing core funding to establish the Centre, 2005-13. We acknowledge Queensland University of Technology, as the administering institution, for its substantial support for the Centre. The core collaborating partners are Swinburne University of Technology, Australasian CRC for Interaction Design, Australian Film Television and Radio School, Edith Cowan University, University of Wollongong and University of New South Wales.

Appendix 3

Research methods

Sampling design and procedures

The telephone interviewing was conducted by Swinburne University's Life & Social Sciences CATI Centre and managed by Ms Gordana Bruce.

A random sample of 1,000 Australians was interviewed. Australian phone numbers for each state and territory were extracted from Australia on Disk. Mobile numbers were excluded from the final number pool. The numbers were classified into urban (capital city) and rural (balance of state/territory) based on the Australian Bureau of Statistics selection of postcodes within the Major Statistical Regions of each state/territory.

There were three quota requirements – age (5 groups) x gender x location (capital city / balance), resulting in 20 quota groups. The number of respondents requested in each quota group, and the actual number of respondents is presented in Table 1.

In a number of categories the actual number of interviews does not match the required number of interviews. There were two main reasons for this occurring.

1. The age of the respondent was not asked until the end of the interview. Although we kept a close watch on the quotas as they were filling up, and took measures to avoid over-sampling within categories, in some instances more than one interviewer was speaking to a respondent in the same quota category and this was not discovered until the interview was completed and the CATI software updated the quota numbers.
2. Since the survey was quite long, we had many instances where respondents stopped the interview part way through due to time constraints. In these cases we made appointments to complete the interviews – in some cases making multiple call backs before completing the interview. In a few cases this meant that the completion of the survey took us over for a quota number for that category. Given the difficulty in obtaining participants, it was deemed more appropriate to complete interviews that were partly done than to abandon those surveys in favour of trying to get another participant.

Sample numbers were further grouped by state and territory urban (capital city) and rural (balance) regions, with proportionately greater numbers in NSW, VIC and QLD. This was done in order to provide data that was more representative of the Australian population. The number of respondents required in each location was calculated based on approximately 64% of the population living in capital cities (based on requirements provided by the client, as shown in Table 1). The number of surveys completed in each state/territory location is presented in Table 2.

Table 1
Quota Categories for WIP Sample

	18-24		25-34		35-49		50-64		65+		Total		Grand Total
	M	F	M	F	M	F	M	F	M	F	M	F	
Urban	44 (43)	42 (41)	59 (62)	59 (61)	95 (93)	95 (94)	72 (71)	74 (73)	46 (47)	57 (58)	316 (316)	327 (327)	643 (643)
Rural	19 (21)	16 (19)	29 (29)	29 (28)	50 (50)	52 (50)	45 (45)	45 (44)	33 (33)	39 (38)	176 (178)	181 (179)	357 (357)
Total	63 (64)	58 (60)	88 (91)	88 (89)	145 (143)	147 (144)	117 (116)	119 (117)	79 (80)	96 (96)	492 (494)	508 (506)	1000 (1000)

Note: M = Male; F = Female

Note: Numbers in brackets are the quotas originally suggested by the client. Numbers outside brackets represent the actual number of respondents

Table 2
Number of Respondents in State and Territory Urban and Rural Locations

	ACT	NSW	NT	QLD	SA	TAS	VIC	WA	Total
Urban	24	185	14	120	45	19	164	72	643
Rural	–	90	16	66	31	12	109	33	357
Total	24	275	30	186	76	31	273	105	1000

Note: Urban (capital city); Rural (balance)

Survey Dates and Call Times

- A pilot shift was conducted by the CATI manager and the supervisors on
- 7th September 2009
- Interviews were conducted between 8th September and 12th October 2009.
- For the first four weeks, week day calls were made between 10am and 8pm Mondays to Thursdays and between 10am and 5pm on Fridays.
- In the fifth week, week day calls were made between 4pm and 9pm each day.
- Saturday calls were made between 10am – 6pm
- Sunday calls were made between 11am – 6pm
- No calls were made on Saturday 26th September due to AFL Grand Final. While there were CATI staff available to work on that day, we did not think the response rate on the day was likely to warrant running the shift.
- There was no morning shift on Thursday 10th September due to software maintenance.
- A shorter Saturday shift (10am – 4pm) was run on Saturday 19th September due to Swinburne network maintenance.

Interviewers

- Calls were made by 34 different people.
- There were 6 supervisors (one supervisor on duty each shift) who made some calls during their shift. All supervisors are current Swinburne students employed as research assistants. They have long-standing dedicated expertise in interview technique.
- The majority of calls were made by 28 interviewers. Most interviewers are current undergraduate and postgraduate Swinburne Social Science students.
- All interviewers were trained and monitored by our supervisors.

Survey Length

- Across all 1000 interviews, survey time ranged from 4 minutes 29 seconds to 1 hour 56 minutes (M = 32 minutes 36 seconds, SD = 10 minutes 4 seconds).
- Interviews for internet users ranged from 5 minutes 16 seconds to 1 hour 56 minutes (M = 35 minutes 5 seconds, SD = 9 minutes 12 seconds)
- Interviews for non-internet users ranged from 4 minutes 29 seconds to 44 minutes 29 seconds (M = 20 minutes 54 seconds, SD = 5 minutes 59 seconds)
- Interviews for ex-internet users ranged from 17 minutes 23 seconds to 45 minutes 25 seconds (M = 25 minutes 25 seconds, SD = 5 minutes 32 seconds)

Please Note: Very short survey time occurs because the software calculates the length of the final call to complete survey. In cases of incomplete surveys, the final call to survey completion was often quite short.

Interviewing Operational Criteria

Callbacks

The number of callbacks for each telephone number was set to a maximum of 10 in the CATI software. Therefore, each number could be called a maximum of 10 times in repeated attempts to reach a potential respondent before being automatically removed from the active phone numbers in the sample. The timing of each callback attempt was programmed into the CATI software to allow for maximum contact potential.

In the cases where a survey was partially completed, the automatic removal of the telephone number was manually overridden. In these cases respondents were called as many times as was necessary to complete the interview. The highest number of call backs recorded for this survey in this category of call was 20 call backs to complete the interview.

Response Rates

The Swinburne CATI Facility developed the following approach to the calculation of response rates. We believe this method gives a detailed account of all call categories.

“Telephone Listing Report” Definitions

- Active – These numbers are still available in the system. For example, there are 1029 answering machine numbers that the system is holding in memory that would be brought up again if the survey were continuing.
- Dead – These numbers are finished with and would not be used again. This file includes the completed surveys and any numbers that have been sent to the ‘kill’ file because they are unusable for the purposes of the survey (eg fax numbers; business numbers; invalid numbers).
 - Invalid numbers are numbers that are not connected

Calculation of Response Rates

Total Tries = 55,931. This is the total number of calls made by the interviewers, including all categories of calls

Total phone numbers used = 27,433 (dead 24,849 + active 2,584).

Of these, 14,419 were ineligible; 4,340 were non-responses; and 8,674 were eligible (see Tables 3 to 5 for full details).

Of the ineligible calls, some phone numbers were ineligible and some participants became ineligible once age and sex quotas had been filled (see Table 3).

Table 3

Number of Ineligible Calls in Various Categories

Ineligible	
Invalid number	7742
Business Number	791
Fax machine	627
Age quota full	4799
Sex quota full	460
Total	14,419

Table 4

Number of Non-Response Calls in Various Categories

Non Responses	
No answer	2240
Answering machine	1684
Engaged	309
Make appointment	41
Number called too many times	66
Total	4,340

Table 5
Number of Eligible Calls in Various Categories

Eligible	
Completed	1000
Refused	7272
Language barrier	296
Out of survey time	69
Respondent stopped interview	29
Interviewer stopped interview	8
Total	8674

Language Barrier: These were calls where the respondent was unable to complete the survey because they could not understand English, or because they were so hard of hearing that it was impractical to attempt a telephone interview.

Out of Survey Time: These were calls made in the last few days of the survey where the respondent would have been willing to participate had the survey continued for a few more days.

Respondent Stopped Interview: These were calls where the respondent stopped the interview part way through and they were unwilling to complete the interview at a later time.

Interviewer Stopped Interview: In a small number of cases the interviewers (in consultation with the supervisor on duty) deemed it appropriate to terminate the interview. This was done in cases where the respondent clearly did not understand the questions or was behaving in an inappropriate way towards the interviewer. In such cases, interviewers are trained to tell the respondent "That was the last question. Thank you very much for your time."

If the language barrier and 'out of survey time' responses are deemed ineligible, this leaves 8,309 eligible responses.

The response rate is then the proportion of completed calls from the total valid eligible responses (1000 / 8309) = 12.04%

Appendix 4

The World Internet Project – International Contacts

Argentina

Institute of Applied Economics & Fundación de Investigaciones
Económicas Latinoamericanas
www.fiel.org.ar

Australia

ARC Centre of Excellence for Creative Industries and Innovation (CCi)
Institute for Social Research, Swinburne University of Technology
www.cci.edu.au/projects/digital-futures

Bolivia

Universidad NUR
www.nur.edu

Canada

Canada Internet Project (CIP)/Recherche Internet Canada (RIC)
www.cipiconline.ca

Chile

Pontificia Universidad Catolica de Chile: Schools of Communications (head), Sociology, and Engineering /
Santiago Chamber of Commerce (CCS).
www.wipchile.cl

China

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

Colombia

Centro de Investigación de las Telecomunicaciones (CINTEL)
www.cintel.org.co

Cyprus

Cyprus University of Technology
Department of Communication and Internet Studies
www.cut.ac.cy

Czech Republic

Faculty of Social Studies, Masaryk University Brno
www.fss.muni.cz/ivdmr

France

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

Germany

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

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, ERS E-Research (Lab)
Macao Internet Project (MIP)
www.macaointernetproject.net

Mexico

Tecnológico de Monterrey, Proyecto Internet
www.wip.mx

New Zealand

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

Poland

Gazeta.pl Research and Analyses Unit
<http://badania.gazeta.pl>

Portugal

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

Russia

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

Singapore

Singapore Internet Research Centre (SiRC)
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 (WII)
www.wii.se

Taiwan

Taiwan e-Governance Research Center
Department of Public Administration, National Chengchi University
www.teg.org.tw
<http://pa.nccu.edu.tw/>

United Arab Emirates

American University of Sharjah, Department of Mass Communication
www.aus.edu

United Kingdom

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

United States

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