

Web Users Are Looking More Like America

By David Birdsell, Douglas Muzzio, David Krane, and Amy Cottreau

Web usage has surged from 13.5 million adult users, or 7% of Americans over age 18, in September 1995 to more than 58 million, or 30% of American adults, today, according to surveys conducted by the Harris Survey Unit of Baruch College and Louis Harris and Associates.¹ We examined the responses of more than 15,000 adult Americans to questions about the World Wide Web in 15 national surveys since September 1995 (see Figure 1). Once heavily overbalanced by male users, the Web is now accessed by men and women almost equally. And, once predominantly white, the Web population now reflects a racial breakdown statistically indistinguishable from Census data for the general population. In order to discern closely where the largest gaps remain, it is particularly important to examine both the percentage of all Web users represented by a particular subgroup of the general population (e.g., 18-24 year-olds) and the percentage of members of that subgroup who access the Web.

The Web reflects America much more accurately today than when the technology was in its infancy. The size and diversity of this medium's appeal, taken with an apparent deceleration in its rate of expansion, has significant implications for those creating content for or studying the Web. Several key demographic and sociological variables suggest both how much the Web population has changed in a short time and where it remains different from the general population.

Growth Is Substantial, But Slowing

In two years (from September 1995 to September 1997) the Web user population almost quadrupled, moving from 13.5 million users to slightly more than 50 million; usage then, however, stabilized during the following three months.

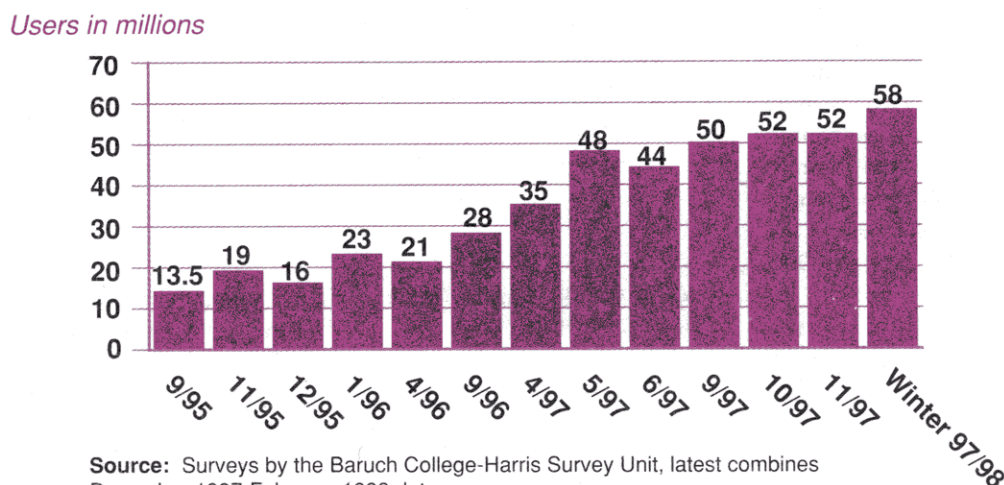
The Baruch College/Harris winter 1997-98 surveys show Web use grew only two percentage points from October 1997 to February 1998 after increasing eight points from April 1997 (18%) to September 1997 (26%). These numbers indicate phenomenal growth by any measure, but use seems unlikely to expand as rapidly in the next 30 months as it has in the last 30.

Web Demographics Look More Like America . . .

In the winter 1997-98 surveys, 44% of the Web users were women, up from 21% in September 1995. As a portion of the overall US population, 3% of adult women in the September 1995 survey said they logged onto the Web compared to 12% of men. Research now shows that 26% of all American women use the Web as do 35% of men.

Figure 1: After a Period of Tremendous Growth, the Number of Web Users is Leveling Off

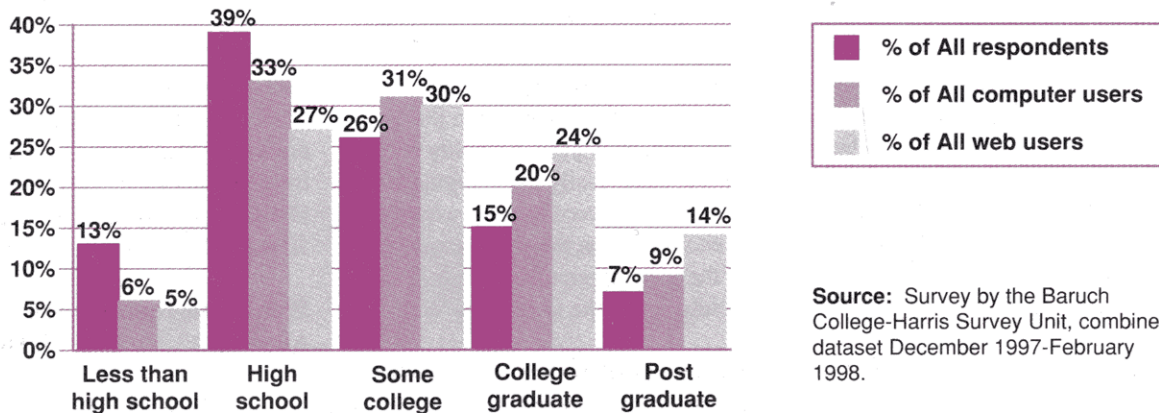
Questions: Do you personally use a computer at (home, work, another location), or not? If "yes," do you personally use the computer to access the World Wide Web, or not?



Source: Surveys by the Baruch College-Harris Survey Unit, latest combines December 1997-February 1998 data.

Figure 2: Greater Proportions of College Educated Logging On

Questions: Do you personally use a computer at (home, work, another location), or not? If "yes," do you personally use the computer to access the World Wide Web, or not?



Source: Survey by the Baruch College-Harris Survey Unit, combined dataset December 1997-February 1998.

According to the latest surveys, 75% of Web users are non-Hispanic whites and 19% are Hispanic or African American, a slight difference from the first 1995 survey which found that 85% were non-Hispanic whites and 11% were Hispanic or African American.² Of the total population, 8% of whites in the first survey accessed the Web compared to 4% of African Americans or Hispanics; in winter 1997-98, almost equal percentages of whites, African Americans, and Hispanics logged onto the Web (30%, 27%, and 26%, respectively).

than their rural counterparts. Suburbanites, or residents of metropolitan areas outside of central cities, comprise only 49% of the general population but 55% of Web users; central city dwellers make up 27% of the general population and 30% of Web users. The distribution of Web users has not changed much since September 1995, when 12% were rural and small-town residents, 31% were central city dwellers, and 58% were suburbanites.

32%—while the proportion of college graduates has gone from 56% to 38% (see Figure 2). Nonetheless, those with a high school education or less are still significantly under-represented on the Web, since they make up 52% of the adult American population compared to the 22% with at least a college degree. Thus, a direct relationship between educational attainment and the likelihood of accessing the Web remains: 19% of all Americans with a high school education or less currently log onto the Web compared to 53% of those with at least a college degree.

... But Differences Remain

The striking shifts in gender and race over the past two years have been accompanied by more gradual changes in the mix of urbanicity, education, income, and age of Web users. Although the population of Web users is more likely to reflect the general population in each of these categories than 30 months ago, a person is still more likely to bump into a Web user who has a college degree and an income of at least \$50,000.

While there are no statistically significant differences in Web access among the four regions of the nation, urbanicity is another matter. Users living in central cities and metro areas constitute a relatively larger proportion of Web users

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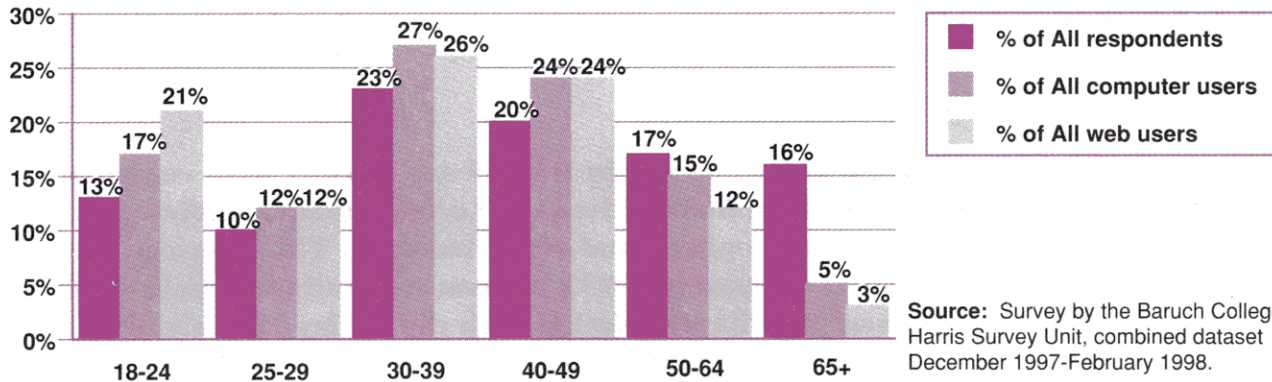
College Grads, Youths More Likely to Surf the Web

The percentage of Web users with a high school education or less doubled between September 1995 and winter 1997-98—16% versus

Not surprisingly, the Web continues to draw a youthful audience; Americans ages 18 to 24 account for 13% of the general population but 21% of the Web population, while Americans 65 and older constitute 16% of the adult population but a tiny 3% of Web users (see Figure 3). Nearly half (49%)

Figure 3: Those Over 65 Not Learning New Tricks

Questions: Do you personally use a computer at (home, work, another location), or not? If "yes," do you personally use the computer to access the World Wide Web, or not?



of all 18- to 24-year-olds and 37% of 25- to 29-year-olds are Web users, compared to 21% of 50- to 64-year-olds and 6% of those aged 65 and older. The percentage of "plugged-in" citizens aged 65 and over has, however, increased since September 1995, when only 1% of that age cohort accessed the Web.

Stability Allows More Predictability

The Web's astonishing growth from 1995 through 1997 puts a premium on obtaining the most recent data to predicate any conclusions about the user population or its behaviors. Consider, for example, that data collected 12 short months ago described the features of a World Wide Web only slightly more than half of its current size. To think of this another way, roughly 80% of the Web-using population has been on-line for 30 months or less. And if we assume that some of the 13.5 million users who were on-line as of September 1995 are not on-line today, that percentage should be even higher.³

Researchers need to rethink their analyses of on-line activity in light of this enormous population of new users. Conclusions about user interests and behavior based solely or even largely on the experience of first-generation Web users could be in for some significant

revision. What Web services will be successful when women represent roughly half—not slightly more than one-fifth—of the on-line population? What differences are we likely to see in usage patterns between lower and upper-income Web users, and how can site developers use that information to their (and their advertising clients') advantage? These and other questions must be reframed in the context of the demographic shifts detailed here.

Further, with the growth in the number of Web users leveling off, it may be possible to develop some relatively stable indices of on-line behavior. It has hitherto made little sense to invest significant resources in profiling a population changing so rapidly that it, in effect, ceases to exist within a year. The present pace of growth suggests a more comprehensible population that stays stable long enough to develop some baseline information on elements beyond identity.

Endnotes:

¹ Many of these surveys have measured access to on-line services and the broader

Internet as well as to the World Wide Web. Recently, Louis Harris and Associates reported that 36% of all adults use the Internet, the World Wide Web, or an on-line service at home, work, or another location (February 18, 1998). For the purposes of the current analysis we report data for the Web only. For more detailed treatments of earlier surveys, see "The 1996 'Net Voter,'" *The Public Perspective*, December/January 1997, 44-45; and "A New Political Marketplace: The Web Snares Voters," *The Public Perspective*, June/July 1996, 33-36.

The winter 1997-98 data are drawn from surveys conducted by telephone within the US in three sessions in December 1997, and January and February 1998 among nationwide cross sections totaling 3,008 adults.

² According to the Bureau of the Census' March 1996 *Current Population Survey* non-Hispanic whites accounted for 75% of American adults.

³ Our data do not account for "churn"—a usage pattern in which the great numbers of people logging on for the first time are balanced somewhat by former users deciding that they do not need to make the Web a part of their lives.



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