# Seventh Survey Results

Colleen Kehoe
GVU Center/Georgia Tech
1997

## Supported by

- GVU Center/College of Computing
- DoubleClick, Yahoo, Netscape
- Sun Microsystems
- FIND/SVP

## Background

- GVU public service run twice a year
- Participation encouraged by W3C, NCSA, INRIA, etc.
- Results & datasets are free
- Widely cited in local, national, trade, and academic publications

## Why Survey the Web?

- Developers need to understand users
  - » time, cost, speed, interest, value, problems
- Proof of concept for online surveys
- Document the changing web
- Market resesarch for online businesses

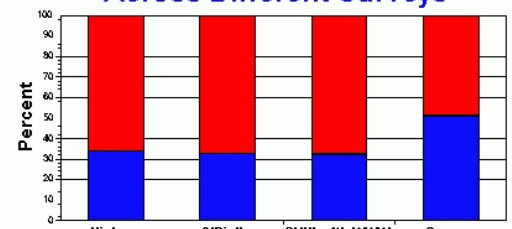
## Methodology

- self-selection and non-random sampling
- advertise in diverse media
  - » rotating banner from DoubleClick
  - » links from popular sites (NCSA, Yahoo, Netscape, CNN)
  - » Usenet announcements
  - » coverage in print media
  - » mailing list announcements

## Methodology (2)

- measuring attrition rates
  - » for 3rd, ranged from 4.54% to 12.58%
- $250 cash prize incentive
- comparison to other surveys
  - » Nielsen, FIND/SVP, O'Reilly, Harris

## Gender Distributions Across Different Surveys




| | Nielsen | O'Rielly | GVU's 4th WWW | Census |
|---|---|---|---|---|
| Female | 34 | 33 | 32.5 | 51.2 |
| Male | 66 | 67 | 67.5 | 48.8 |

Source: GVU's WWW User Surveys
<URL: http://www.cc.gatech.edu/gvu/user_surveys>
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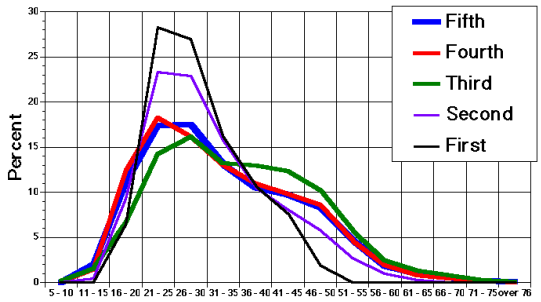
# Results

- General Demographics
- Web/Internet Usage
- Consumer Activities & Opinions
- Electronic Privacy Opinions
- Summary

# General Demographics

## Age Distributions Across Surveys




Source: GVU's WWW User Surveys
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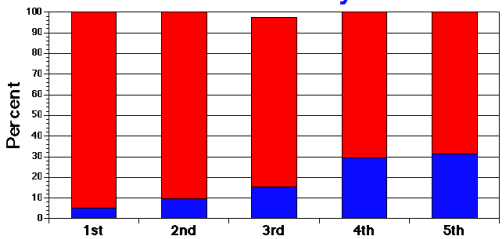
## Gender Distributions Across Surveys




| | 1st | 2nd | 3rd | 4th | 5th |
|---|---|---|---|---|---|
| Female | 5.1 | 9.7 | 15.5 | 29.3 | 31.5 |
| Male | 94.9 | 90.3 | 82 | 70.7 | 68.5 |

Source: GVU's WWW User Surveys
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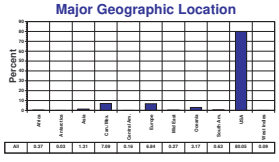
## Major Geographic Location

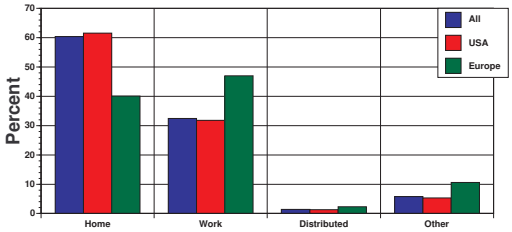


# Other Demographics

- Average Income: $58,000 (US)
  - » $60K 6th, $59K 5th, $63K 4th, $69K 3rd
- Education: 87% some college
  - » 3% Ph.D. 6/7th, 4% 5th, 7% 4/3rd, 13% 2nd
- Occupation: 30% Computer, 24% Education, 20% Professional, 10% Management

# Web/Internet Usage

## Primary Access split by Location




| | Home | Work | Distributed | Other |
|---|---|---|---|---|
| All | 60.38 | 32.43 | 1.44 | 5.74 |
| USA | 61.54 | 31.79 | 1.32 | 5.35 |
| Europe | 40.1 | 46.98 | 2.32 | 10.6 |

Source: GVU's Seventh WWW User Survey[tm] (Conducted April 1997)
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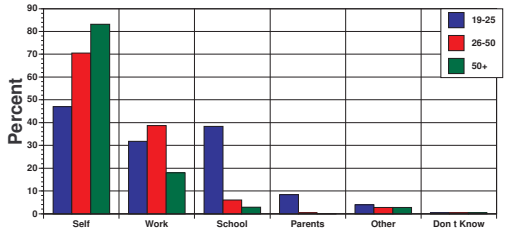
## Who Pays for Access split by Age




| | Self | Work | School | Parents | Other | Don t Know |
|---|---|---|---|---|---|---|
| 19-25 | 46.97 | 31.77 | 38.32 | 8.4 | 3.95 | 0.46 |
| 26-50 | 70.54 | 38.66 | 6.05 | 0.43 | 2.74 | 0.37 |
| 50+ | 83.1 | 18.03 | 2.87 | 0.12 | 2.75 | 0.37 |

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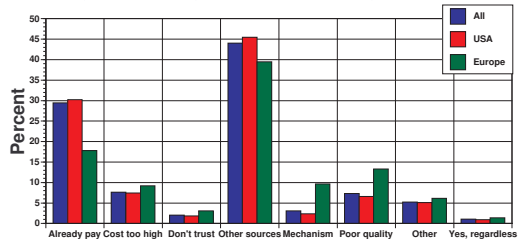
## Why Not Pay Fees split by Location




| | Already pay | Cost too high | Don't trust | Other sources | Mechanism | Poor quality | Other | Yes, regardless |
|---|---|---|---|---|---|---|---|---|
| All | 29.48 | 7.67 | 2.03 | 44.06 | 3.11 | 7.32 | 5.26 | 1.07 |
| USA | 30.26 | 7.44 | 1.87 | 45.45 | 2.37 | 6.59 | 5.08 | 0.93 |
| Europe | 17.77 | 9.19 | 3.06 | 39.51 | 9.63 | 13.29 | 6.12 | 1.42 |

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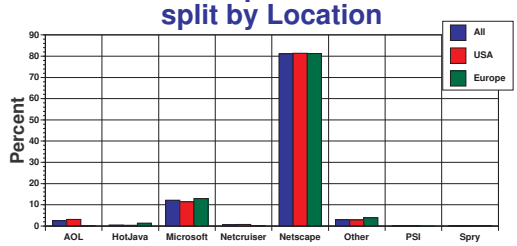
## Browser You Expect to Use in 12 Mo. split by Location




| | AOL | HotJava | Microsoft | Netcruiser | Netscape | Other | PSI | Spry |
|---|---|---|---|---|---|---|---|---|
| All | 2.48 | 0.47 | 12.13 | 0.63 | 81.13 | 3.01 | 0.06 | 0.09 |
| USA | 3.06 | 0.37 | 11.45 | 0.73 | 81.34 | 2.92 | 0.06 | 0.07 |
| Europe | 0.19 | 1.3 | 12.94 | 0.19 | 81.28 | 3.82 | 0 | 0.28 |

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## Problems Using Web split by Location

| | Broken Links | Cost | Find Known | Lost | Organize | Revisit | Speed | Vizualization | Other |
|---|---|---|---|---|---|---|---|---|---|
| All | 49.9 | 5.41 | 30.31 | 4.36 | 27.8 | 12.16 | 66.31 | 8.29 | 9.88 |
| USA | 49.97 | 3.97 | 30.48 | 4.26 | 27 | 12.22 | 65.54 | 8.13 | 10.11 |
| Europe | 46.93 | 15.36 | 26.82 | 4.38 | 35.1 | 10.06 | 69.55 | 10.61 | 8.1 |

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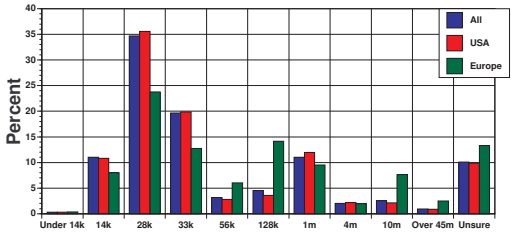
## Connection Speed split by Location




| | Under 14k | 14k | 28k | 33k | 56k | 128k | 1m | 4m | 10m | Over 45m | Unsure |
|---|---|---|---|---|---|---|---|---|---|---|---|
| All | 0.32 | 11.02 | 34.7 | 19.68 | 3.16 | 4.53 | 11.03 | 2 | 2.55 | 0.95 | 10.07 |
| USA | 0.33 | 10.81 | 35.58 | 19.85 | 2.81 | 3.6 | 11.96 | 2.17 | 2.14 | 0.87 | 9.87 |
| Europe | 0.37 | 8.01 | 23.74 | 12.76 | 6.05 | 14.15 | 9.5 | 1.96 | 7.64 | 2.51 | 13.31 |

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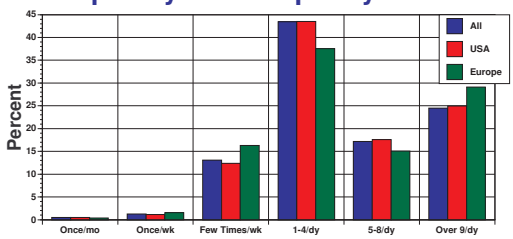
## Frequency of Use split by Location




| | Once/mo | Once/wk | Few Times/wk | 1-4/dy | 5-8/dy | Over 9/dy |
|---|---|---|---|---|---|---|
| All | 0.51 | 1.26 | 13.07 | 43.47 | 17.2 | 24.49 |
| USA | 0.5 | 1.14 | 12.36 | 43.49 | 17.56 | 24.95 |
| Europe | 0.37 | 1.58 | 16.29 | 37.52 | 15.08 | 29.14 |

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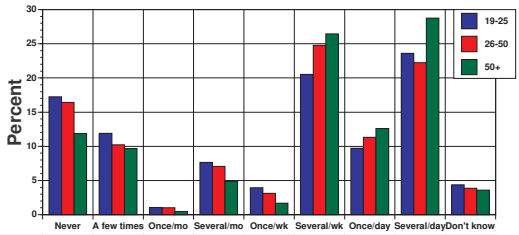
## Instead of Watching TV split by Age




| | Never | A few times | Once/mo | Several/mo | Once/wk | Several/wk | Once/day | Several/day | Don't know |
|---|---|---|---|---|---|---|---|---|---|
| 19-25 | 17.23 | 11.89 | 1.07 | 7.66 | 3.93 | 20.52 | 9.71 | 23.61 | 4.37 |
| 26-50 | 16.42 | 10.23 | 1.03 | 7.05 | 3.11 | 24.77 | 11.3 | 22.22 | 3.86 |
| 50+ | 11.85 | 9.69 | 0.48 | 4.89 | 1.68 | 26.44 | 12.62 | 28.74 | 3.6 |

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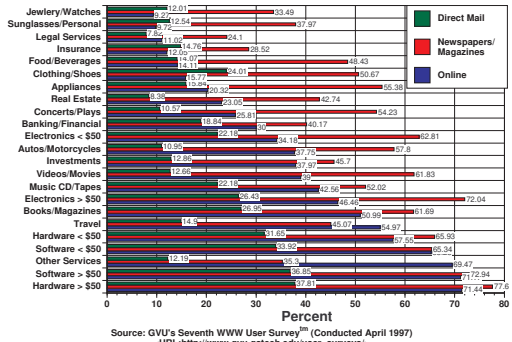
# Consumer Activities and Opinions

## Seeking Behavior Across Mediums

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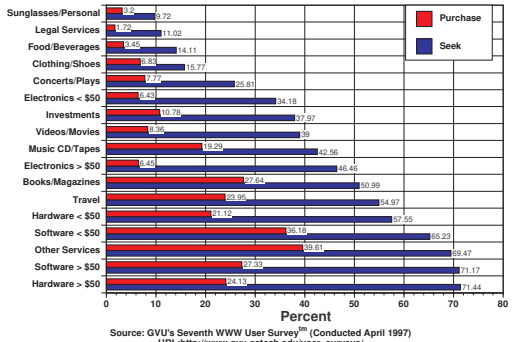
## Online Seeking and Purchasing

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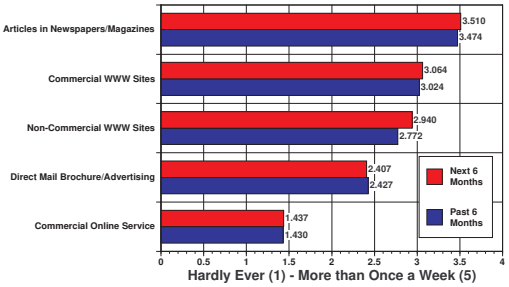
## Sources Used in Purchasing

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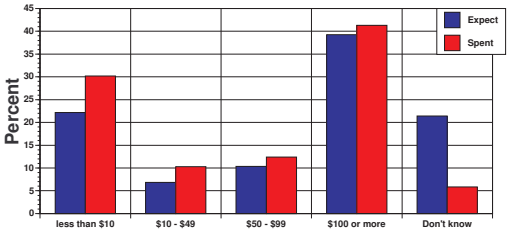
## Total Spending on WWW Purchases




| | less than $10 | $10 - $49 | $50 - $99 | $100 or more | Don't know |
|---|---|---|---|---|---|
| Expect | 22.15 | 6.85 | 10.33 | 39.24 | 21.43 |
| Spent | 30.19 | 10.28 | 12.41 | 41.29 | 5.83 |

Source: GVU's Seventh WWW User Survey[tm] (Conducted April 1997)
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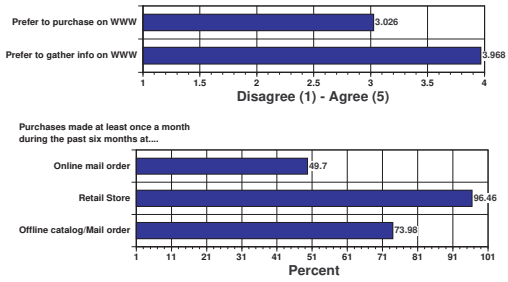
## Preferences For Purchasing and Information Gathering

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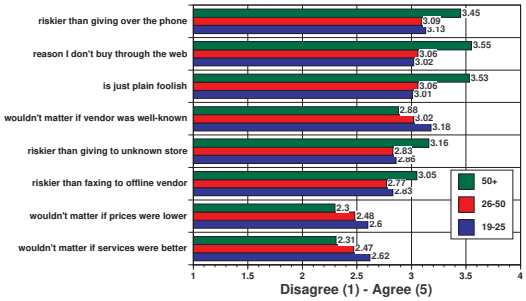
## Use of Credit Cards on the Web split by Age

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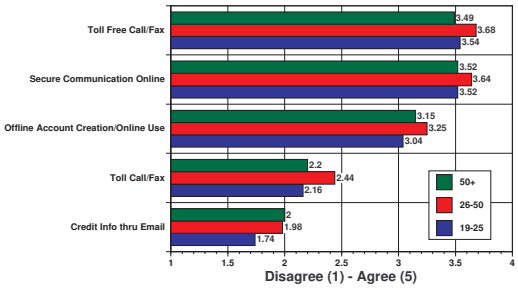
## Preferences Toward Purchasing Alternatives split by Age

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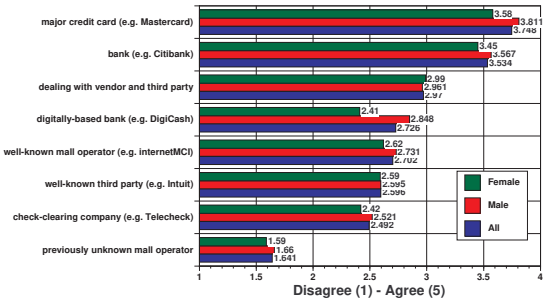
## Third Party Account Handling split by Gender

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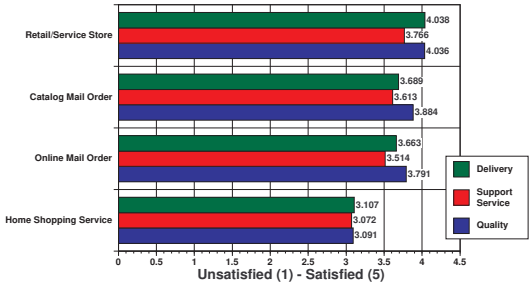
## Customer Perception of Vendors

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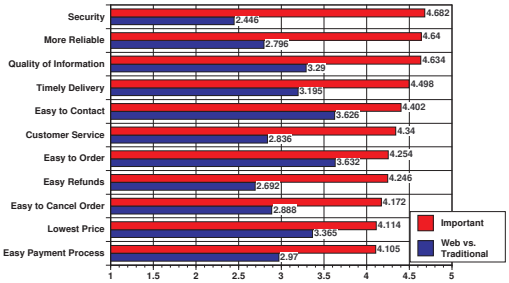
## Vendor Characterisitcs




For Web vs. Traditional, a score higher than 3 means the Web vendor is prefered to a traditional vendor.
For Important, higher numbers signify greater importance: unimportant (1) - very important (5).

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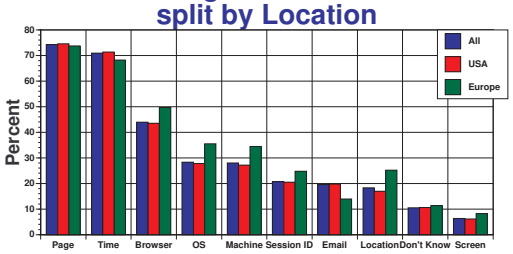
# Electronic Privacy Opinions

## What Ought to be Collected split by Location




| | Page | Time | Browser | OS | Machine | Session ID | Email | Location | Don't Know | Screen |
|---|---|---|---|---|---|---|---|---|---|---|
| All | 74.27 | 70.95 | 43.98 | 28.33 | 28.04 | 20.75 | 19.56 | 18.36 | 10.48 | 6.31 |
| USA | 74.54 | 71.29 | 43.57 | 27.8 | 27.14 | 20.54 | 19.77 | 16.95 | 10.55 | 6.14 |
| Europe | 73.71 | 68.21 | 49.72 | 35.53 | 34.43 | 24.75 | 13.97 | 25.19 | 11.33 | 8.25 |

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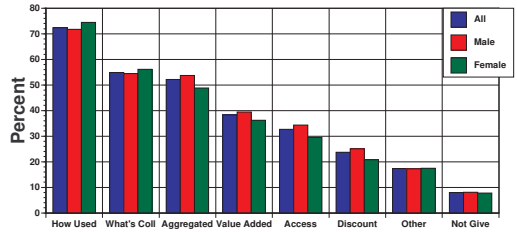
## Terms and Conditions split by Gender




| | How Used | What's Coll | Aggregated | Value Added | Access | Discount | Other | Not Give |
|---|---|---|---|---|---|---|---|---|
| All | 72.38 | 54.84 | 52.11 | 38.3 | 32.72 | 23.68 | 17.38 | 8.02 |
| Male | 71.71 | 54.4 | 53.76 | 39.42 | 34.32 | 25.05 | 17.29 | 8.08 |
| Female | 74.41 | 56.14 | 48.8 | 36.26 | 29.53 | 20.85 | 17.5 | 7.8 |

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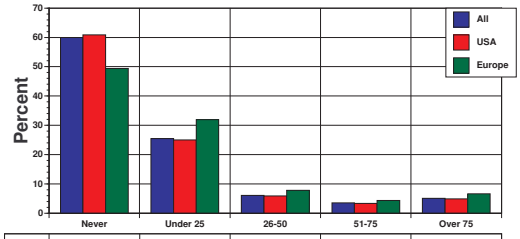
## Falisfication split by Location




| | Never | Under 25 | 26-50 | 51-75 | Over 75 |
|---|---|---|---|---|---|
| All | 59.93 | 25.48 | 6.03 | 3.49 | 5.07 |
| USA | 60.88 | 25 | 5.92 | 3.34 | 4.86 |
| Europe | 49.36 | 31.92 | 7.79 | 4.32 | 6.6 |

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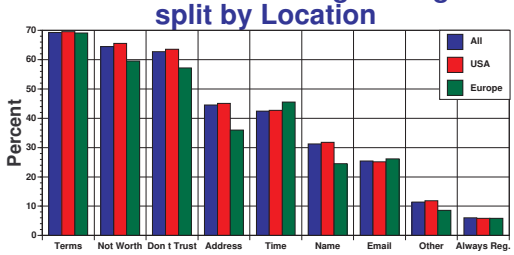
## Reason for Not Registering split by Location




| | Terms | Not Worth | Don t Trust | Address | Time | Name | Email | Other | Always Reg. |
|---|---|---|---|---|---|---|---|---|---|
| All | 69.34 | 64.49 | 62.72 | 44.51 | 42.42 | 31.28 | 25.46 | 11.4 | 6.02 |
| USA | 69.55 | 65.57 | 63.54 | 45.12 | 42.7 | 31.78 | 25.16 | 11.86 | 5.88 |
| Europe | 69.09 | 59.52 | 57.21 | 35.97 | 45.54 | 24.53 | 26.18 | 8.58 | 5.83 |

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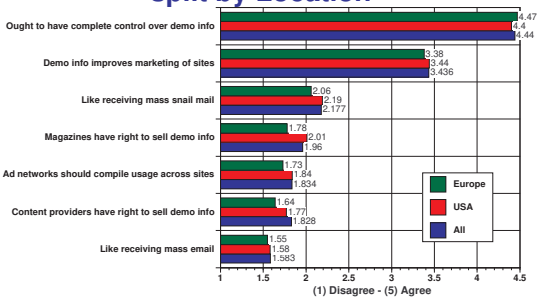
## Opinions on Direct Marketing split by Location

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Contact: www-survey@cc.gatech.edu

## Demographics Summary

- well-educated, early-30's, english-speaking, US-based, high-income
- 2/3 males
- 1/4 computer industry, 1/4 education

## Web Use Summary

- 2/3 access from home, paying for it themselves
- most access daily
- most connect at modem (slow) speeds

## Consumer Summary

- Used more for information gathering than purchasing, but
- 40% plan to spend over $100 in next 6 months
- growing acceptance of online purchasing
- similar characteristics to mail order vendors

## Privacy Summary

- important issue for web users
- most simply want notice & consent
- prefer aggregate usage
- 40% provide false registration information at some point
- a way to build trust with customers

## For More Information...

http://www.gvu.gatech.edu/user_surveys/

Next survey runs Oct 10-Nov 10,1997

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