

The Internet in the Czech Republic 2008

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Four Years of WIP in the Czech Republic

WORLD INTERNET PROJECT – THE CZECH REPUBLIC

www.worldinternetproject.net

MASARYK UNIVERSITY IN BRNO

FACULTY OF SOCIAL STUDIES

Czech Republic



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INTRODUCTION

1. World Internet Project – The Czech Republic

The World Internet Project (WIP) is a worldwide project based on a longitudinal study examining the influence of computers, the Internet and related technologies on the individual, family and society. The project has been organized by the Center for the Digital Future at USC Annenberg (<http://www.digitalcenter.org/>) in the USA. The first survey was carried out in 1999 in the USA and since then over 20 countries have joined the project. Each country is responsible for the administration and funding of an annual quantitative survey.

In the Czech Republic, funding for the “World Internet Project–Czech Republic” (1P05ME751) is provided by the Ministry of Education. Research has been conducted by the Faculty of Social Studies of Masaryk University in Brno. The person in charge of the project is PhDr. et Mgr. David Šmahel, Ph.D. In the year 2008, the survey was co-financed by research project "Problems of cyber threats from the point of view of Czech Republic concerns" (VD20072010B01), which is being carried out by a research team originating from several faculties at Charles University in Prague.

This report is based mainly on a survey that was done by the STEM agency in September 2008 using face-to-face interviews. The survey addressed 1,520 respondents 12 years of age and up and an additional 695 respondents between 12-30 years of age (i.e. 2215 respondents in sum). The reason was to be able to perform in depth analyses of the age group 12-30, in which the rate of Internet penetration is very high and usage practices well-developed. These two research samples were made representative for the Czech Republic as far as the variables of sex, education, age, region, and the size of the respondent's domicile are concerned. A merged sample, which we worked with when preparing this report, was weighted to represent the population of the Czech Republic 12 years of age or more. Three previous surveys, data from which were also used in this report, addressed 1832 (2005), 1706 (2006), and 1586 (2007) respondents; these three samples were collected in the same way as the basic sample of 2008 and were made representative for the Czech Republic as far as the mentioned quotas are concerned.

For all queries relating to this report, please contact the head of the World Internet Project—Czech Republic:

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2. Executive summary

I. WHO USES THE INTERNET?

1. Do you personally use the Internet, i.e. the World Wide Web, e-mail, or any other part of the Internet from home or from any other place?

- *Between the years 2005 and 2008, Internet penetration in the Czech Republic increased from 50% to 57%.*
- *Growth occurred specifically in those aged 19-40, in females, housewives/househusbands, business people and self-employed, unemployed, skilled workers, and operating workers.*
- *Among those unable to communicate in any foreign language, forty-five percent have been using the Internet.*

2. How long, i.e. how many years or months, have you used the Internet?

- *More than one third of Internet users have been using the Internet for more than six years.*

3. The place of usage

- *Nine tenths of Internet users connected from home in 2008.*

4. On average, about how many hours and minutes per week do you use the Internet in the following locations?

- *An average Czech Internet user spends 13.4 hours per week on average on the Internet.*
- *Between 2005 and 2008, the time spent on the Internet increased by 3.1 hours on average.*

5. What type of Internet connection do you have at home?¹

- *Three quarters of Czech Internet users have broadband/always on connection at home in 2008 as compared to one third in 2005.*

II. WHAT DO CZECH INTERNET USERS DO ONLINE?

6. On average, how often do you...?

- *Three quarters of Czech Internet users check their e-mail at least daily.*
- *The following four most common online activities are looking for news, surfing or browsing, sending attachments, and instant messaging.*
- *One third of Internet users make Internet phone calls more than once a week.*
- *Almost half of Czech Internet users look for information about products at least weekly. However, only 12% of Internet users buy things online more than weekly.*
- *One fifth of Czech Internet users use online banking and pay bills online at least weekly.*

7. In an average month, how often do you purchase products or services over the Internet?

- *Forty-four percent of Internet users buy something online at least once in an average week.*

¹ The given options in 2008 were (1) phone modem (dial-up or ISDN), (2) broadband/always on (ADSL, cable TV, wireless; not a cell phone!), (3) cell phones (GPRS, EDGE, UMTS) or CDMA, and (4) other. The 2007 questionnaire contained a variation of the same options. We combined more detailed reply possibilities from 2005 and 2006 to create the categories used in the 2007 and 2008 questionnaires.

III. SECURITY ISSUES

8. Do you consider your computer sufficiently secured?

- Nine out of ten of those who have a computer at home stated that their computer is sufficiently secured.

9. When working with computers one can encounter various problems or threats. Can you please tell us how often do you deal with these problems?

- Almost half of users receive spam in their e-mail box at least once a week.

10. Do you have enough information at your disposal about Internet crime and how to be protected against it?

- Forty- three percent of Internet users claimed not to have sufficient information.

11. How concerned would you be about the security of your credit or bankcard information when or if you ever bought something online?

- Thirty percent of respondents would be very or extremely concerned when or if buying something online.

12. What is the main reason you DO NOT use the Internet?

- The distribution of reasons has not changed since 2006. Having no computer or no Internet connection remains the most serious reason.

IV. SKILLS AND SUBJECTIVE INTERNET USE BENEFITS

13. Now we will discuss your computer skills. Can you tell us please, what and how well can you use or do?

- Thirty percent of computer owners rated themselves as average in their ability to effectively deal with computer viruses.
- Fifteen percent of computer owners rated themselves as average in their ability to create a web page.

14. Because of your Internet access, do you feel that your work performance/productivity has improved a lot, improved somewhat, stayed the same, worsened somewhat, or worsened a lot?

- Over half of economically active Internet users claimed that Internet use has improved their work performance/productivity.

V. THE INTERNET AND SOCIAL RELATIONS

15. Has the use of the Internet increased or decreased your contact with the following groups?

- The share of Internet users claiming that Internet use had increased their contact with family, friends, and people in their professions went up significantly between 2005 and 2008.

16. Would you say that members of your household have spent more face-to-face time together, spent less face-to-face time together, or spent about the same amount of face-to-face time together since being connected to the Internet at home?

- Thirty percent of Internet users report spending more time face-to-face with their family since being connected to the Internet.

17. Internet and politics

- Almost one quarter of respondents claim that Internet use can help people better understand politics.

VI. INTERNET AS A SOURCE OF INFORMATION

18. For information in general, how important is each of the following to you as a source of information?

- Between 2005 and 2008, the declared personal importance of newspapers and radio as a source of information declined significantly among the population of Internet users.

19. How important is each of the following to you as a source of entertainment?¹¹

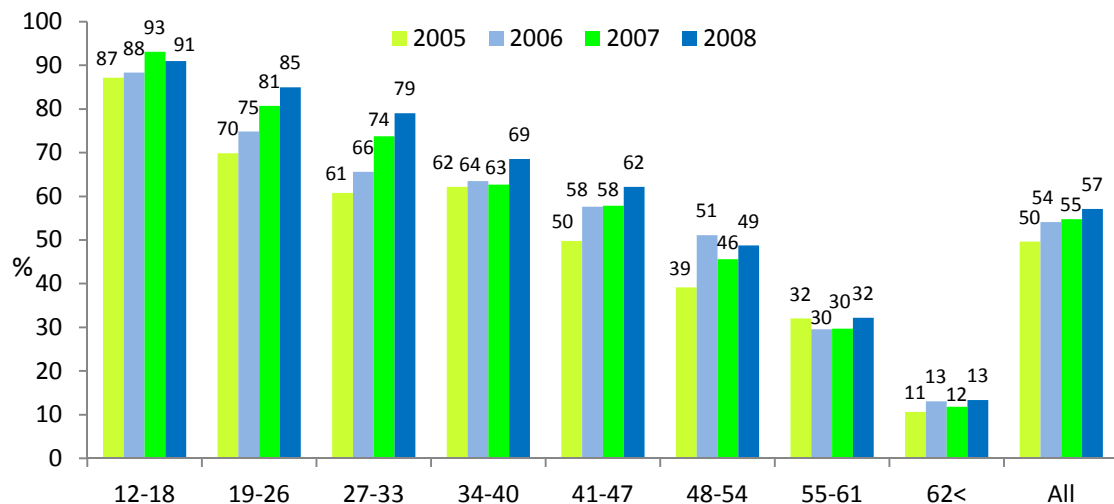
- Between 2005 and 2008, the declared personal importance of newspapers and radio as a source of entertainment declined in the population of Internet users.

I. WHO IS USING THE INTERNET?

1. Do you personally use the Internet, i.e. the World Wide Web, e-mail, or any other part of the Internet from home or from any other place?

1.1. Internet use by age

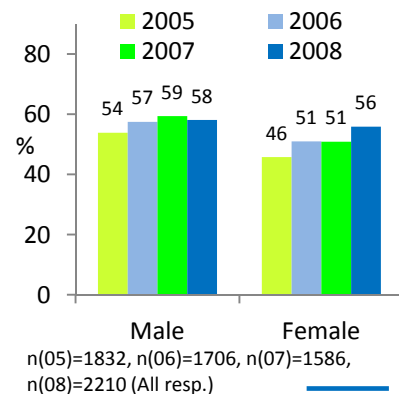
The graph below shows the shares of Internet users within respective age categories. As we see from the following chart, overall Internet penetration in the Czech Republic has been increasing steadily since 2005; in 2008, it reached 57% in the 12 years and up population as compared to 50% in 2005. Looking more closely at age, the pace of growth has not been equal across all age groups. The fastest growing groups are 19-26 and 27-33, with a 15% and 18% increase respectively. Considerably high rates of growth are in the age segment 34-54, where the number of Internet users has increased by almost 10%. The slight increase in the share of teenagers using the Internet can be explained by approaching a suppositional "ceiling of Internet penetration". On the other hand, there has been no statistically significant increase of Internet users in the population of 55 years of age or older, therefore making age a more important digital divide factor than it was four years ago.



n(05)=1832, n(06)=1706, n(07)=1586, n(08)=2210 (All respondents)

1.2. Internet use by gender

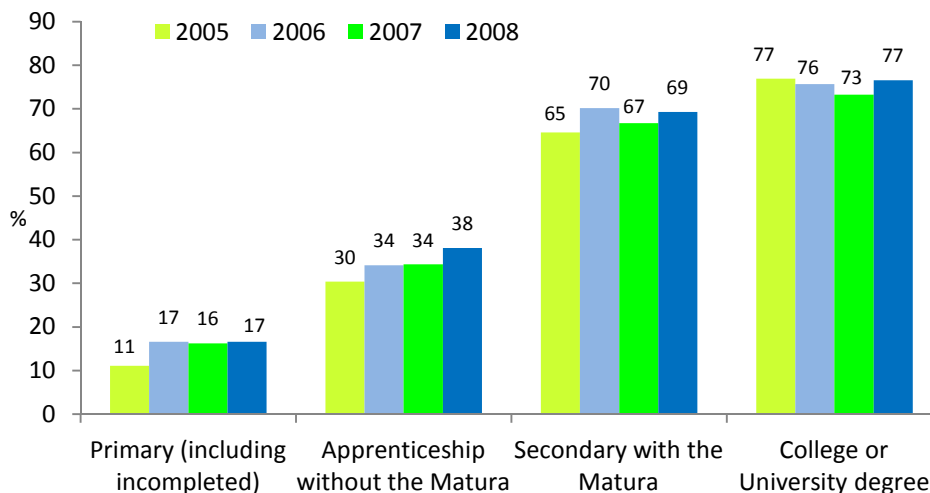
The graph shows shares of Internet users in the population of respective gender. Unlike age, the gender divide seems to have closed now as women have been adopting the Internet at a greater rate than men have over the last four years. Women equaled men both in the share of Internet users within gender subpopulations and in the share of Internet users. In 2008, the percentage of women among the Internet population was 50%.



1.3. Internet use by education²

When analyzing Internet use by education, we put aside pupils and students not to have skewed results. As one can see in 2006 report, the numbers are very different otherwise, especially in low education groups due to the high Internet penetration among pupils and students. The shares of Internet users among students and pupils can be seen in subchapter 1.4.

The proportion of Internet users in all education subgroups between 2006 and 2008 has not changed significantly, but for a slight increase in Internet users among those with apprenticeships (without Matura). Still, seven tenths of those with Matura use the Internet; the share of Internet users among respondents with college and university degrees is slightly higher (77%). People with primary education have the least chance of using the Internet and despite its slight growth, Internet penetration is still far below the national average in this group.

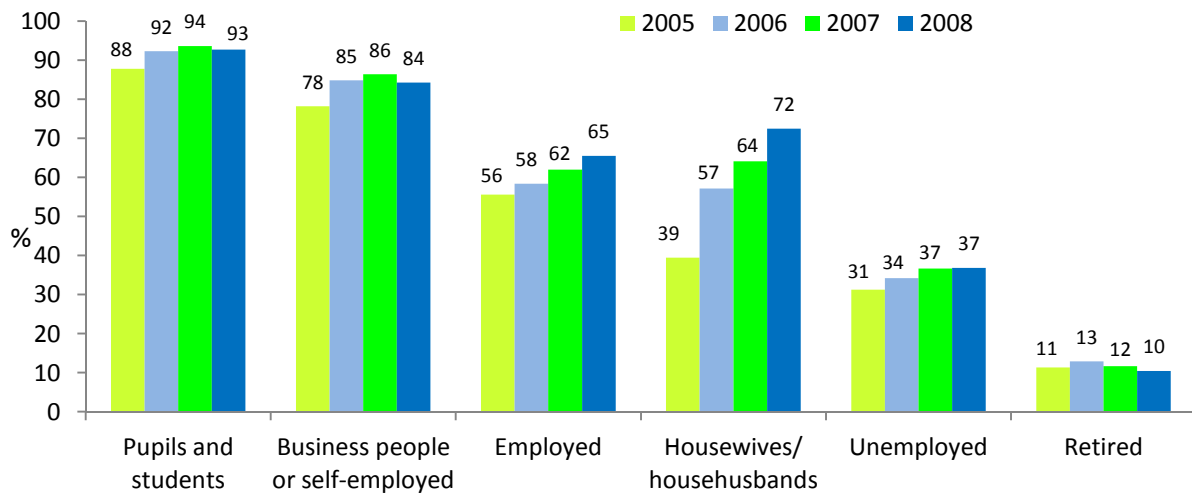


n(05)=1524, n(06)=1405, n(07)=1306, n(08)=1858 (All respondents without pupils and students)

² In the Czech Republic, primary education is from seven to fifteen years of age. Secondary education without the Matura (apprenticeship) ends with some form of a certificate after two to three years of practically oriented training in chosen skills (e.g. hairstylist, waiter/-ess, electrician, car mechanic, and the like). The Matura is the final exam after four years of attending a type of secondary school. It is equivalent to German “das Abitur”, British “A-levels”, or French “le baccalauréat”.

1.4. Internet use by social status

The social status dimension of the Czech digital divide has changed significantly since 2008. We have witnessed substantial growth in Internet penetration among the employed and housewives/househusbands; Internet penetration has risen from 39% to 72% in the latter group making it the third most connected social status group. Because the pace of growth in this group has persisted over four years and because the ratio of penetration difference is considerably high, the validity of this growth seems to stand on firm ground despite the low base in this category.³ All other status groups with the exception of the retired witnessed noticeable growth between 2005 and 2008; this finding is nevertheless not surprising after examining the role of age in social distribution of Internet use (see subchapter 1.1.). Growth stagnated between 2006 and 2008 in groups of business people and self-employed, pupils and students, and the unemployed. The inner structure of increase in employers using the Internet will be examined further in the subchapter 1.5.

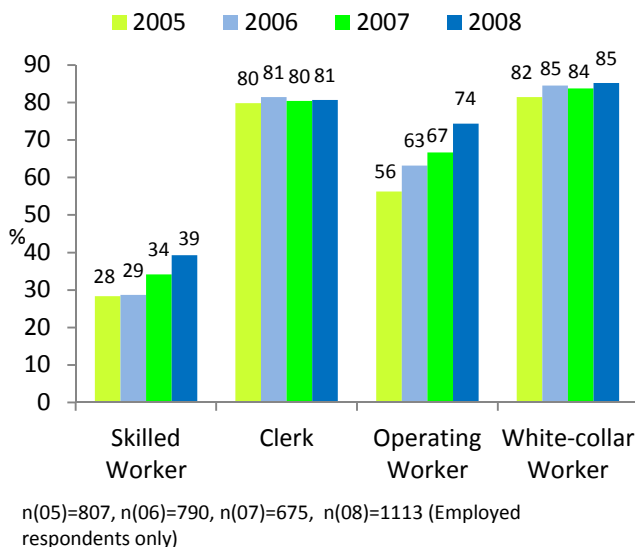


n(05)=1832, n(06)=1706, n(07)=1586, n(08)=2210 (All respondents)

³ There were 71 respondents in 2005, 56 respondents in 2006, 64 respondents in 2007, and 69 respondents in 2008 in this category.

1.5. Internet use by employee type

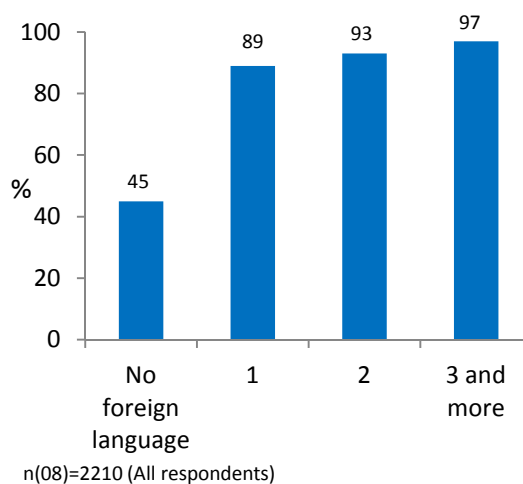
A closer look at the category of employees unveils disparities among various employee types. Four fifths of clerks and white-collar workers have been using the Internet over the last four years; there has been no significant growth between 2005 and 2008 in these categories. On the contrary, only 28% of skilled workers used the Internet in 2005. Between 2005 and 2008, the share of Internet users in the groups of both skilled workers and operating workers rose substantially, reaching 39% of Internet users among skilled workers and 74% of Internet users in the group of operating workers. The share of Internet users among operating workers thus seems to be approaching levels of clerks and white-collar workers. We expect a slowdown in this group in the following few years because of its heterogeneity in which age and education represent important factors.



1.6. Internet use by the number of foreign languages⁴

For the first time we inquired about the number of languages spoken by respondents in order to probe the extent to which active knowledge of foreign languages influences Internet use. The graph represents the shares of Internet users in populations of people using a given number of languages. An astonishing 74% of the population of 12 years and up claimed not to be able to communicate in any foreign language.⁵ Every tenth respondent claimed to be able to make himself/herself understood in two or more foreign languages.

Forty-five percent of those not actively speaking any foreign language use the Internet, which is a high figure considering the fact that an overwhelming majority of the World Wide Web exists in foreign languages. More than nine tenths of respondents who actively speak at least one foreign language use the Internet.



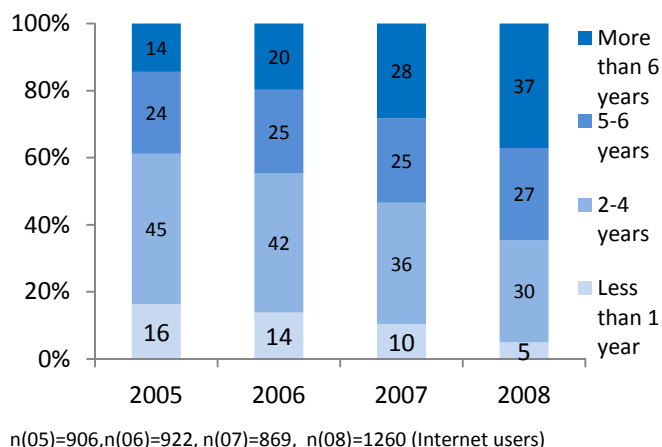
⁴ The question was, "How many foreign languages do you make yourself understood?"

⁵ In spite of the fact that foreign language classes are required in primary and secondary schools in the Czech Republic.

2. How long, i.e. how many years or months, have you used the Internet?

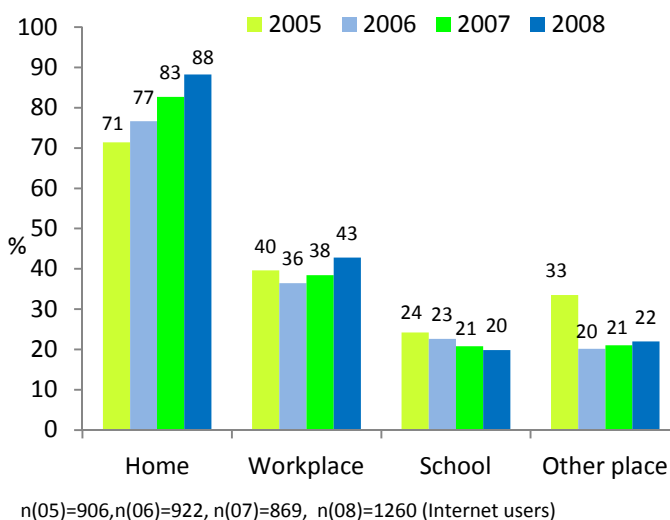
In 2008, users had been accessing the Internet on average for 5.7 years as compared to 4.7 years in 2007. Because of the deceleration of Internet diffusion in the Czech Republic over recent years, the average length of Internet use is growing steadily; between 2005 and 2008, the difference between means is 1.8 years.

When we look more closely at the composition of users from the point of view of duration of Internet use in years, we can see a substantial decline in beginners accompanied by a substantial increase in experienced⁶ users in the Czech Internet users population, with 16% beginners in 2005 as compared to 5% in 2008. In the year 2005, only 14% of users had used the Internet longer than 6 years; in 2008, it was 37%.



3. The place of usage⁷

Internet penetration into people's homes has been progressing steadily over the last four years on an average rate of 5% of Internet users per year. In 2008, it reached almost nine out of ten households in which respondents using the Internet live. There has been a slow decline of those connecting from schools (a difference of only 4% of Internet users between 2005 and 2008). The higher share of "other place" replies in 2005 was caused by different answer choices – Internet users were also asked



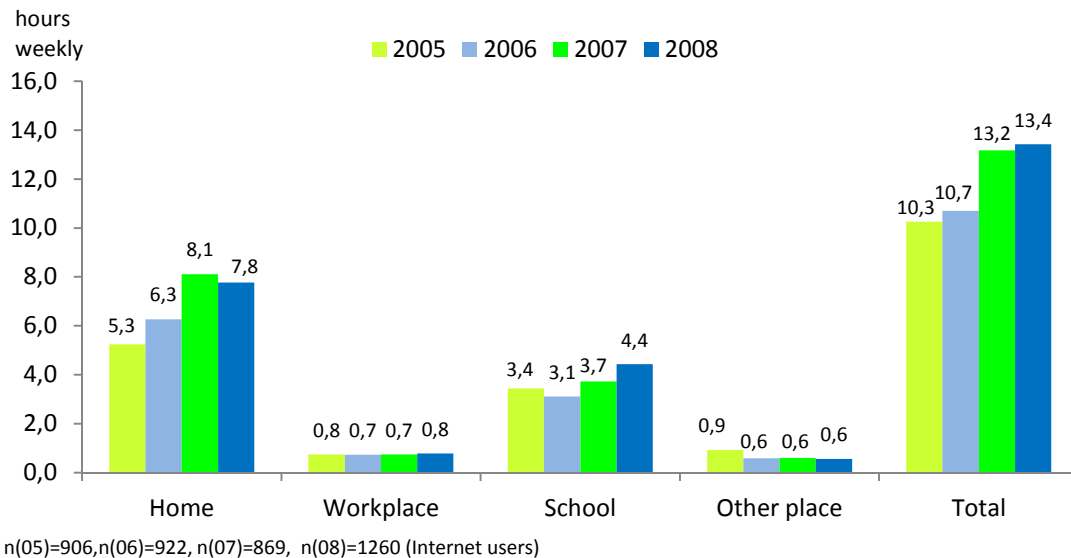
that year whether they use the Internet from a public library or from their friends' homes. For the purposes of comparison, these answers were included in the "other place" option.

⁶ The word "experienced" is used here in its limited meaning; it represents those who have been using the Internet for more than 6 years.

⁷ The original question in the questionnaire was "On average, about how many hours and minutes per week do you use the Internet in the following location?" Values were recalculated to obtain the groups of those who mentioned at least some time at the provided place.

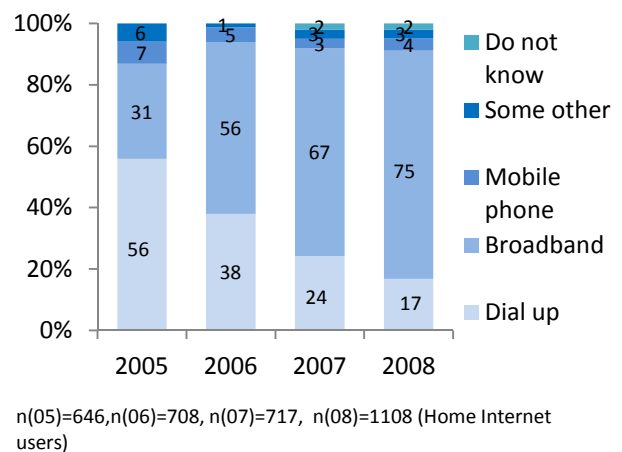
4. On average, about how many hours and minutes per week do you use the Internet in the following locations?

The average amount of time a Czech Internet user spends on the Internet has increased from 10 hours in 2005 to 13.4 hours in 2008. This difference consists partly of an increase in the time people are on the Internet in schools (one hour increase) but mainly of an increase in time spent on the Internet at home (2.5 hours increase). There was no noticeable change in time spent using the Internet from the workplace or elsewhere.



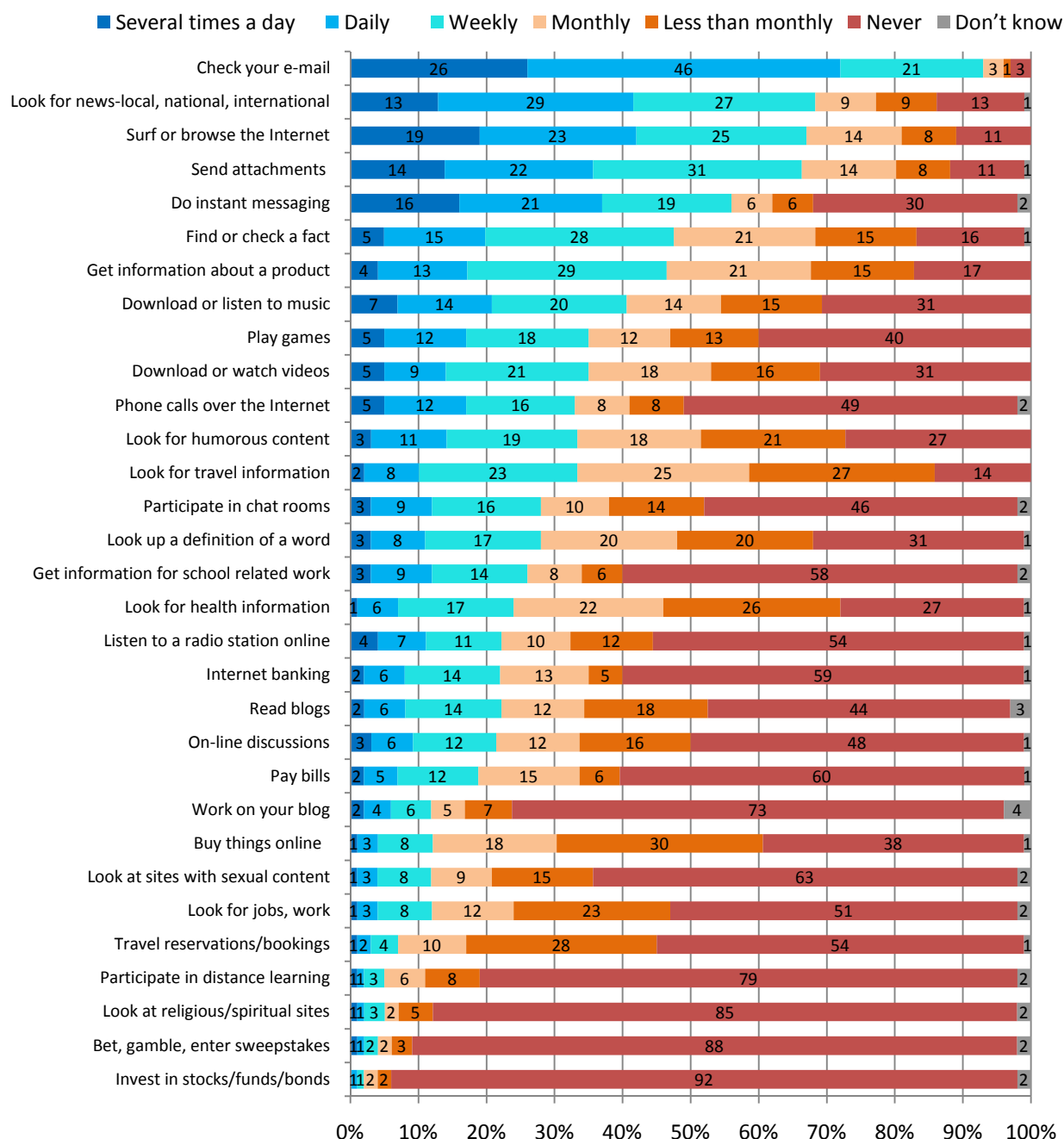
5. What type of Internet connection do you have at home?⁸

Three quarters of home Internet users have broadband/always on connection at home in 2008 as compared to one third in 2005. The Czech Republic has been behind in terms of advanced Internet connection technologies infrastructure development. Therefore, 56% still had dial-up Internet connection at home in 2005. However, this share declined to 17% in 2008. The ratio of mobile phone use as a connection device remained the same over the period.



⁸ The given options in 2008 were (1) phone modem (dial-up or ISDN), (2) broadband/always on (ADSL, cable TV, wireless; not a cell phone!), (3) cell phones (GPRS, EDGE, UMTS) or CDMA, and (4) other. The 2007 questionnaire contained a variation of the same options. We combined more detailed reply possibilities from 2005 and 2006 to create the categories used in the 2007 and 2008 questionnaires.

II. WHAT DO CZECH INTERNET USERS DO ONLINE?



n(08)=1260 (Internet users)

6. On average, how often do you...?

Three quarters of Czech Internet users check their e-mail boxes at least daily making it the most widespread online activity; one quarter of Internet users check their e-mail at least several times a day. Among activities that at least half of Czech Internet users do weekly are news seeking,

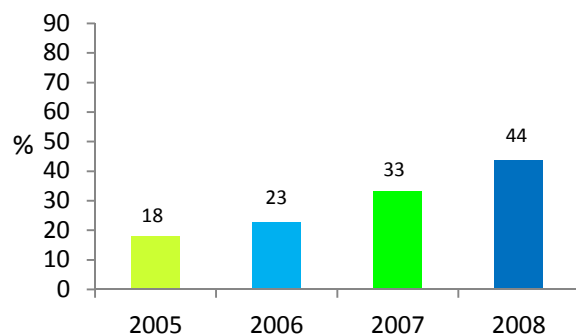
surfing, sending content (not only text) via e-mail, and instant messaging. Over one third of Czech Internet users do instant messaging at least daily; approximately one fifth are "true web surfers".

We can distinguish four basic types of activities according to the frequency with which they are performed. The first two types concern overall frequency – there are either activities performed by the majority of users on various levels of frequency (as are four most common activities plus facts and product information seeking) or very specific activities that are performed by a small minority of users, whereas the rest of Internet population do not do them at all (e.g., online investing, online gambling, e-learning, and working on blogs). The third type is represented by activities that are performed infrequently by a relatively big share of users (e.g., travel related online activities, buying things online, looking for jobs, looking for humorous content, and downloading or watching or listening to online video or music). Finally, the fourth type is represented by activities that are practiced either frequently or not at all – these activities have a very small share of users performing them infrequently (e.g., instant messaging, online games, school related information seeking, phone calls over the Internet).

Considering ways of communication, e-mail remains the most common means of online communication, followed by instant messaging. Internet phone calls have yet to find their way into Czech households as only one third of Czech Internet users take advantage of this more than once a week. In the information-seeking dimension, looking for news and surfing the Internet (without a precise goal in mind) are the most frequent activities. Surfing/browsing the Internet, downloading and watching/listening to online video/music are the most common forms of entertainment, done by more than one third of the Internet population at least weekly (it is two thirds in the case of surfing/browsing). Where the Internet and economy intersect, most common is getting information about products, which is done at least weekly by almost half of Czech Internet users. However, Czechs still prefer brick and mortar businesses because only 12% of Internet users shop online at least weekly. Online investments are not popular at all, mirroring generally a low popularity of investment in stock and bonds among Czech households. One fifth of Czech Internet users do online banking and pay bills online at least weekly.

7. In an average month, how often do you purchase products or services over the Internet?⁹

The share of users shopping online has grown considerably over last four years, reaching 44% of users who claimed to buy something online at least once in an average week. Compared to data from 2005, this figure has more than doubled since then.



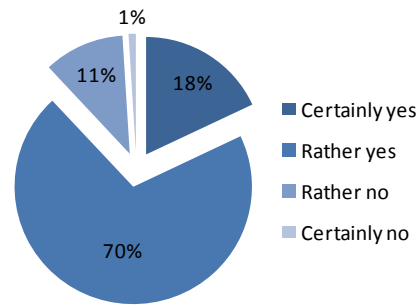
n(05)=906, n(06)=922, n(07)=869, n(08)=1260 (Internet users)

⁹ Values were recalculated to obtain the share of users that purchase products or services over the Internet at least once a month.

III. SECURITY ISSUES

8. Do you consider your computer sufficiently secured?

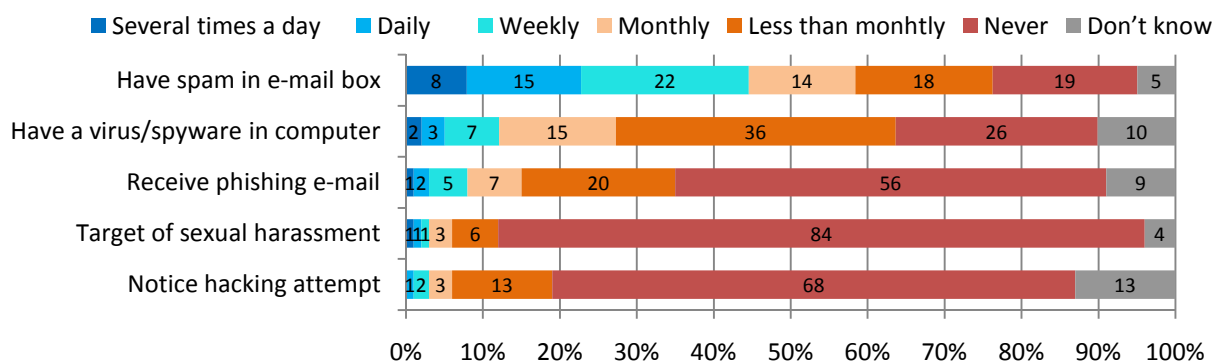
Almost nine out of ten of those who have a computer at home claimed that their computer is secure enough. Only 11% replied that their computer is rather not sufficiently secured; only 1% answered that they think their computer is not safe at all. We also asked respondents with a computer at home whether there is an antivirus program installed on their computer.¹⁰ Four fifths replied that they have one; thirteen percent of respondents did not know how to reply. Six percent of respondents reported not having antivirus software on their computer.



n(08)= 1319 (Computer at home)

9. When working with a computer one can encounter various problems or threats. Can you please tell us how often you deal with such problems?

The most frequent issue is spam in users' e-mail boxes, with almost half reporting this at least once a week. Twenty seven percent of Czech Internet users also report experiencing computer viruses at least once a month. Sexual harassment represents a minor problem, with 6% of users saying it occurs at least once monthly.

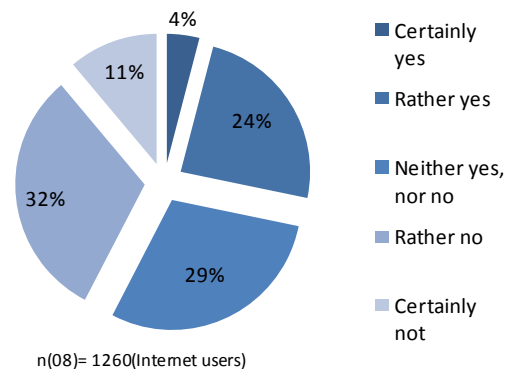


n(08)=1260 (Internet users)

¹⁰ "Do you use virus and spyware protection software on your home computer, i.e., do you have antivirus software installed?"

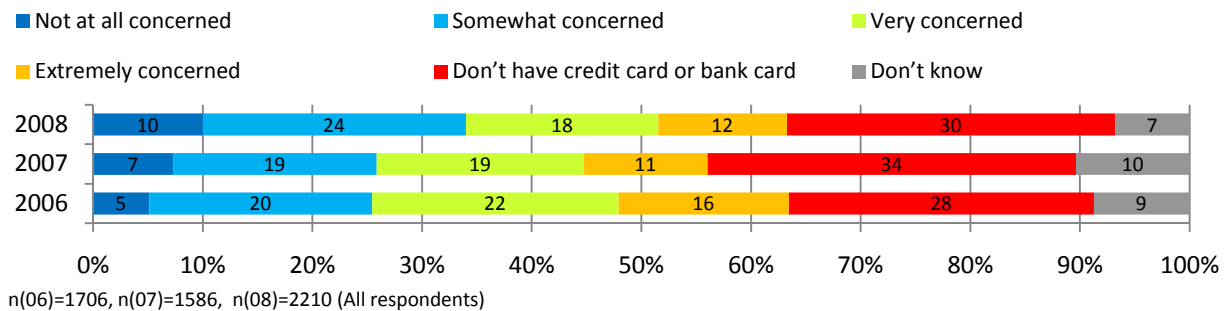
10. Do you have enough information at your disposal about Internet crime and how to be protected against it?

Over one quarter of Internet users claimed to have enough information about Internet crime and ways of protecting themselves against it. Forty three percent of Internet users said they did not have sufficient information.



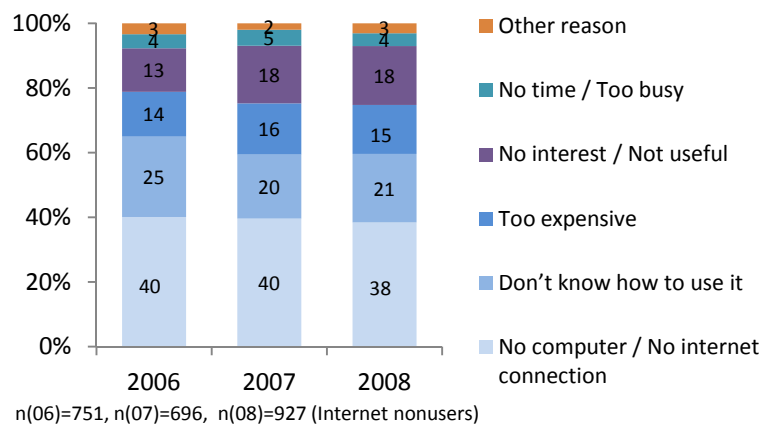
11. How concerned would you be about the security of your credit or bankcard information when or if you ever bought something online?

In 2008, one third of respondents would not be concerned at all or be only somewhat concerned about the security of their credit or bankcard when or if they ever bought something online (compared to 27% in 2006). Thirty eight percent were very or extremely concerned in 2006; in 2008 it is eight percent less.



12. What is the main reason you DO NOT use the Internet?

Since 2006¹¹ there has been no significant change in the reasons for not using the Internet. A lack of physical access followed by a perceived lack of respective skills and financial barriers remain the dominant reasons for not using the Internet.

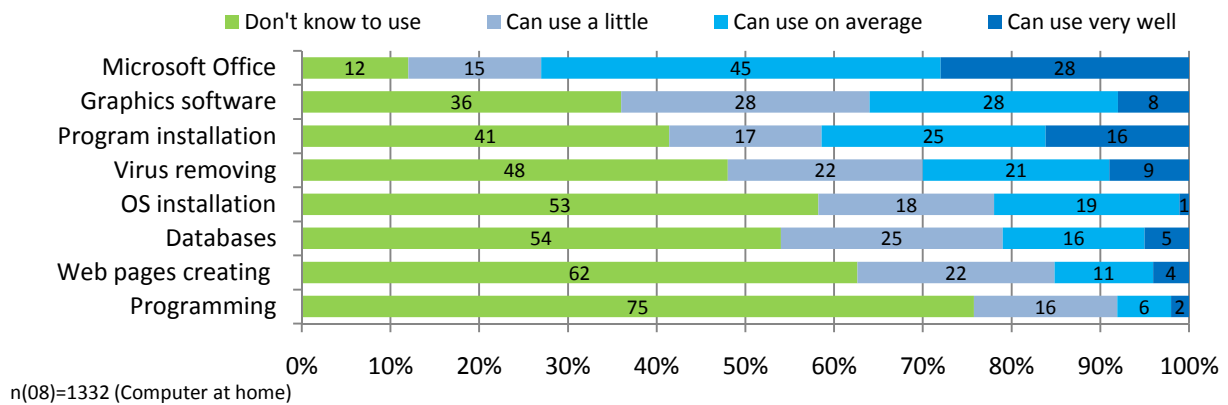


¹¹ The question and answer options were different in 2005 therefore making resulting data uncomparable to 2006-2008.

IV. SKILLS AND SUBJECTIVE INTERNET USE BENEFITS

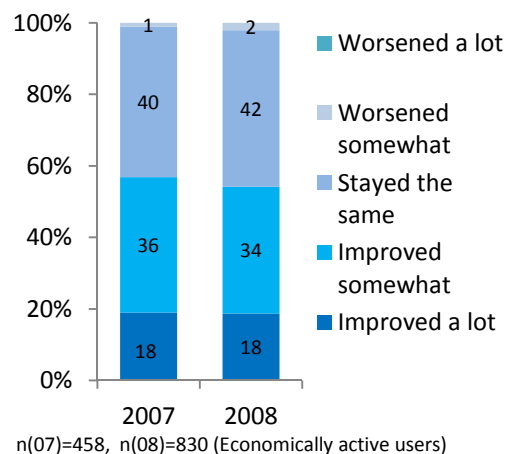
13. Now we will discuss your computer skills. Can you tell us please, what and how well can you use or do?

More than two thirds of those with at least one computer at home rated themselves at least average in their ability to use Microsoft® Office software. Only one tenth of questioned respondents do not know how to use Microsoft® Office software at all. Other probed skills were less known – only program installation and graphics software use exceeded the share of one third of questioned respondents able to use respective skills at least adequately. The least known were—according to expectations—programming and web page creating. What is interesting is the relatively few computer owners able to remove a virus – with only three out ten claiming to be able to do that at least adequately.



14. Because of your Internet access, do you feel that your work performance/productivity has improved a lot, improved somewhat, stayed the same, worsened somewhat, or worsened a lot?

Subjective judging regarding the impact of the Internet on work performance/productivity has not changed significantly between 2007 and 2008.¹² The share of economically active users who claimed that their work productivity/performance had improved somewhat or had improved a lot is slightly over 50%. Only 1-2% claimed that their performance/productivity had worsened somewhat.



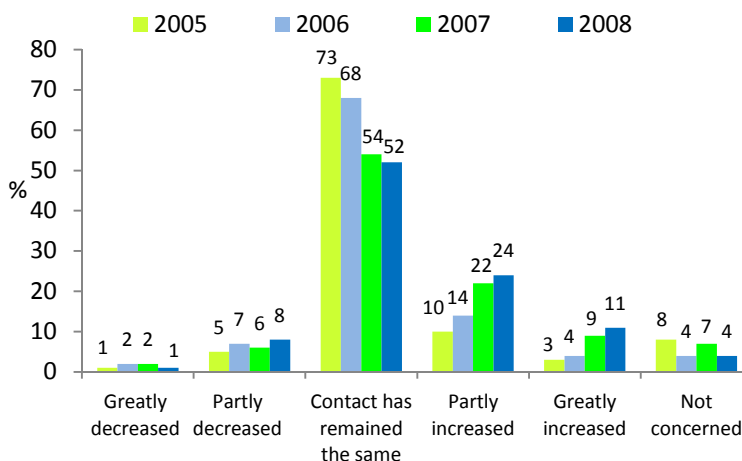
¹² The difference between these results and the 2006 data are very small; we do not compare them here because the question slightly changed between 2006 and 2007 therefore impeding the possibility to interpret small differences (for comparison, see 2006 report).

V. THE INTERNET AND SOCIAL RELATIONS

15. Has the use of the Internet increased or decreased your contact with the following groups?

14.1. Family

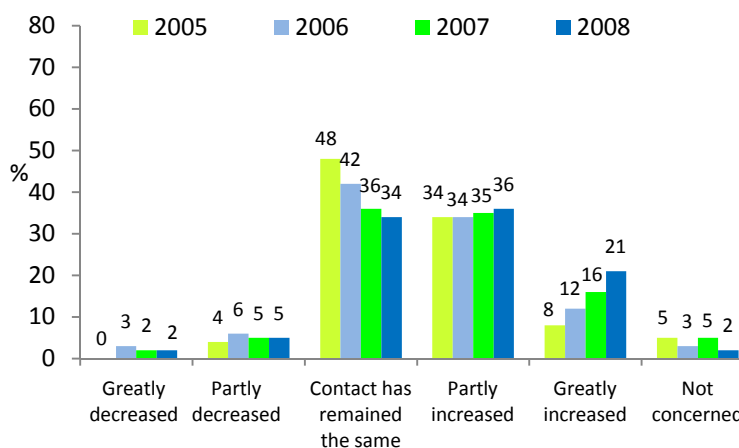
The Internet seems to be a positive family relationship facilitator. According to one third of Internet users, contact with family increased somehow (partly or greatly) due to Internet use, whereas in 2006, only 13% of Internet users claimed this. Correspondingly, the number of Internet users stating no change dropped from 73% to 52%, and the share of those citing a worsening of contact with family is almost a constant 10%.



n(05)=906, n(06)=922, n(07)=869, n(08)=1260 (Internet users)

14.2. Friends

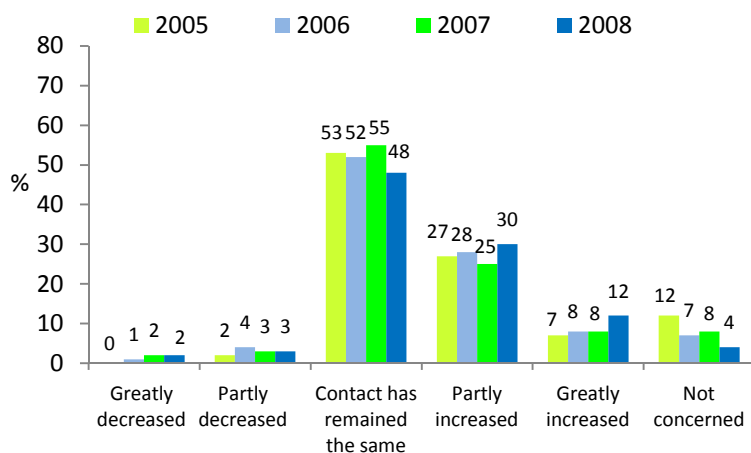
We see similar development in assessing the change in contact with friends. The only difference is that the share of "partly increased" replies did not change while those claiming that their contact with friends increased greatly went up by 13%. Contact has remained the same in the case of one third of Internet users in 2008 compared to 48% in 2005.



n(05)=906, n(06)=922, n(07)=869, n(08)=1260 (Internet users)

14.3. People who share your hobbies

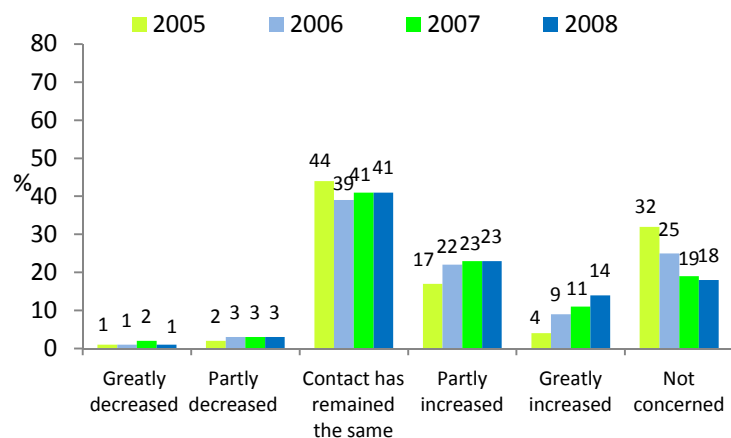
Over half of Internet users replied that Internet use somehow increased their contact with people sharing their hobbies (the share increased by 8% between 2005 and 2008). Almost half of Internet users stated that their contact with people who share their hobbies remained the same. Only five percent replied that their contact had somehow decreased.



n(05)=906, n(06)=922, n(07)=869, n(08)=1260 (Internet users)

14.4. People in your profession

Thirty seven percent of economically active Internet respondents replied that contact with people in their profession had increased greatly or partly due to Internet use. Their share in the economically active population of Internet users more than doubled between 2005 and 2008. In addition, less than one fifth said they were not concerned in 2008 compared to 32% in 2005.



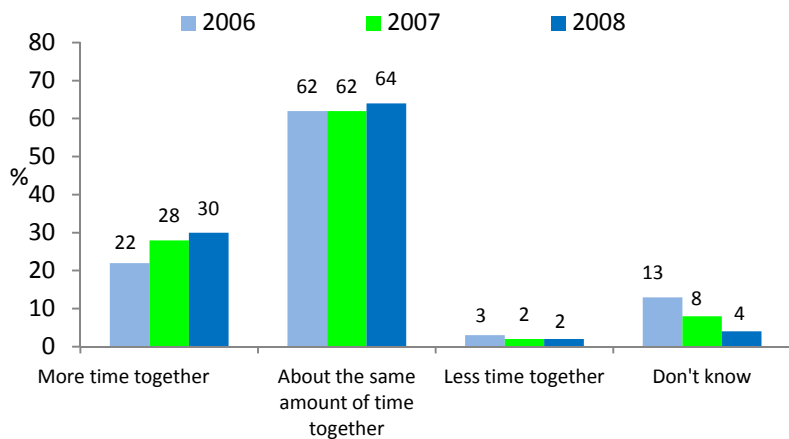
n(05)=903, n(06)=808, n(07)=685, n(08)=1039 (Economically active Internet users)

14.5. People who share your political interests and people who share your religion

There was no significant change in contact with people sharing political interests or religion between 2005 and 2008. More than half think that their contact with these groups had remained the same. Nine percent of Internet users think that Internet use has partly increased their contact with people who share their political interests. Leaving aside the "not concerned" option, all other replies had very low shares ranging from one to four percent

16. Would you say that the members of your household have spent more face-to-face time together, spent less face-to-face time together, or spent about the same amount of face-to-face time together since being connected to the Internet at home?

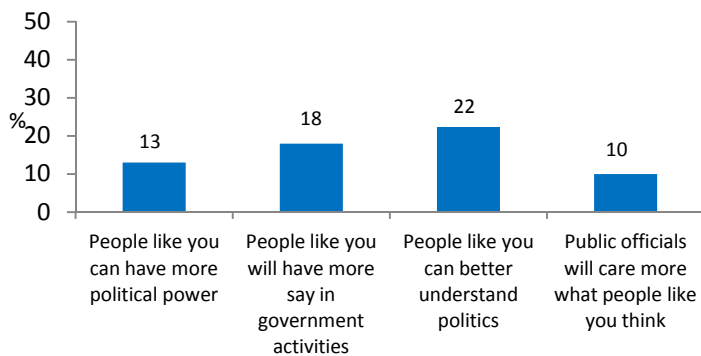
In 2008, 30% of Internet users claimed that the time spent face-to-face with their family members is greater since being connected to the Internet at home. Compared to 2005, this means an increase of 8%. Only 2% reported the opposite. Almost two thirds of Internet users think that time spent together had not been affected, which indicates no significant difference between 2006 and 2008.



n(05)=906, n(06)=922, n(07)=869, n(08)=1260 (Internet users)

17. Internet and politics: would you agree that due to Internet use....?

This graph contains the share of agreements with statements that can be seen below the columns in the graph. Twenty-two percent of respondents think that people can better understand politics due to Internet use. Only one in ten respondents think that as an effect of Internet use, public officials will care more about what people think.



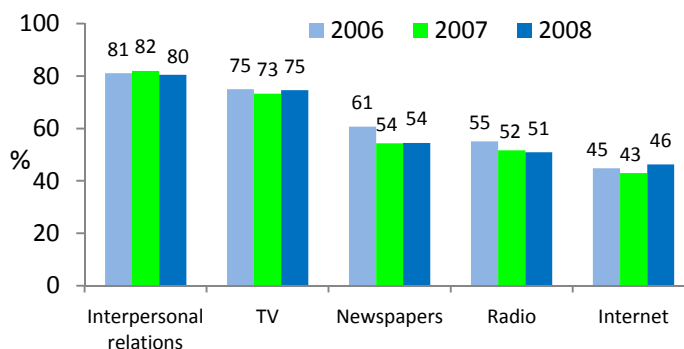
n(08)=2210 (All respondents)

VI. INTERNET AS A SOURCE OF INFORMATION

18. For information in general, how important is each of the following to you as a source of information?¹³

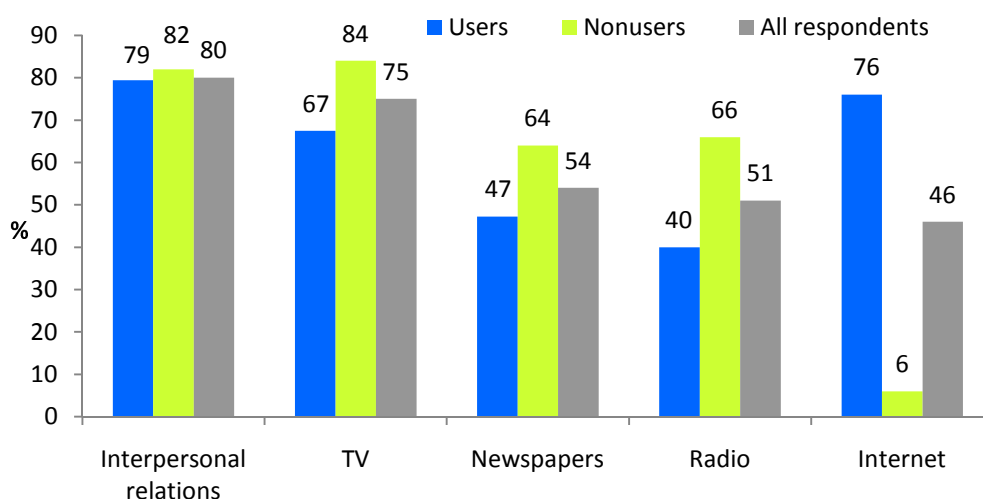
Taking into consideration all respondents, the only change between 2006 and 2008 is the slight decline in importance of newspapers (from 61% to 54%) and radio (from 55% to 51%); all other media are not rated better or worse in comparison to 2006.

In this graph, the numbers represent the share of those who replied in 2008 that the respective source of information is "very important" or "important" to them.



n(05)=1832, n(06)=1706, n(07)=1586, n(08)=2210 (All resp.)

There was not a significant change in attitude towards various types of media from 2006 to 2008 in the population of nonusers. In the population of Internet users, however, we witnessed a significant 10% decline of TV and radio importance as the source of information. In 2006, 57% of users declared that newspapers are an important or very important source of information for them; in the case of radio, it was 49% of Internet users.



N(08) = 2210 (All respondents)

¹³ Answer options were "very important", "important", "undecided/neutral", "not important", and "not important at all".

19. How important is each of the following to you as a source of entertainment?¹³

In this graph, the numbers represent those who stated in 2008 that the respective source of information is "very important" or "important" to them.

In the case of media as a source of entertainment, changes are of the same nature as in the case of media as a source of information. The only significant change is a decline in importance of radio and newspaper as a source of entertainment in the population of Internet users. Respective declines are 9% in the case of radio and 8% in the case of newspapers. The importance of the Internet as a source of entertainment has not changed significantly.

