WORLD

INTERNET

PROJECT

POLAND 2011

# POLISH INTERNET USERS AS COMPARED TO THE WORLD: WHERE AND WHICH WAY IS THE POLISH INTERNET GOING?

Professor William Dutton of the Oxford Internet Institute talks to Polish Internet researchers at the presentation of results of the World Internet Project: Poland 2011

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# WORLD INTERNET PROJECT: POLAND 2011

This document is an edited record of speeches and presentations made at a conference held to present the results of the survey "World Internet Project: Poland 2011". Participants of the conference were academic and business researchers of the Internet and representatives of companies coordinating WIP in Poland:

Prof. William Dutton (Oxford Internet Institute), Dr. Dominik Batorski (University of Warsaw),
Dr. Mirosław Filiciak (Warsaw School of Social Sciences and Humanities), Dr. Justyna Hofmokl (Centrum Cyfrowe),
Dr. Marek Troszyński (Collegium Civitas), Dr. Jan Zając (University of Warsaw), Tomasz Józefacki (Agora),
Piotr Muszyński (TP Group), Arkadiusz Kustra (Agora), Jakub Rzeźnik (TP Group).

The meeting was held on 24th October 2011 at the premises of Agora in Warsaw.

**Project idea and management:** Piotr Toczyski
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**Conducting the World Internet Project survey in Poland:** Research and Analysis Team of Gazeta.pl
(official partner of WIP) in coordination with the TP Group Market Research Department and with Orange: Piotr Toczyski, Arkadiusz Kustra, Maria Gerszewska, Jakub Rzeźnik

**Information on the World Internet Project:**
Participants of the survey conducted every year in more than a dozen countries of the world are asked questions, prepared using strict methodology, about such things as: access to the Internet, reasons for and purposes of using or not using the Internet, media consumption time, ways of using the Internet and their online experience, perception of security in the Internet, Internet as a factor reinforcing or weakening contacts with the social environment, influence of the Internet on the interviewees' public life awareness, credibility of information on the Internet, Internet and other media as information and entertainment source, time spent offline with family and friends, multitasking, feelings and opinions on freedom of expression and the public sphere.

**The World Internet Project** is a leading international project monitoring transformations of the media and their influence on social and economic phenomena. About thirty reputable centres from all around the world participate in the WIP research, which is coordinated by the prestigious USC Annenberg School for Communication and Journalism at the University of Southern California. In Poland, the exclusive partners of the World Internet Project are Agora (official partner) and TP Group.

Professor Dutton, a long-standing director of the Oxford Internet Institute, is responsible, among others, for the Oxford e-Social Science Project, supported by the Research Committee of the Economic and Social Research Council.
He actively participates in Oxford Internet Surveys, which are the key source of information about the use of Internet in the UK and are an element of the World Internet Project. William H. Dutton is currently working on the idea of "the fifth power", i.e. Internet media. His interests include such topics as organising a cooperation network similar to web 2.0 and research on next generation politics.

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# NEXT GENERATION INTERNET USERS

They have access to the Internet anytime, anywhere, they don't just sit in front of a PC at home. They are active, they are eager to consume culture also in the offline world. But they don't want to pay for books, films or music online. These are next generation users who have already started appearing in Poland.

"A new kind of digital divide is emerging, a divide between first and next generation users," said Prof. William Dutton of the Oxford Internet Institute when he was presenting the results of the British edition of World Internet Project surveys. Sociologists are already concerned with the first type of digital divide – between Internet users and those who don't spend time online. This is because Internet helps to raise the quality of life thanks to quick access to information, cheaper and more convenient services, etc. However, a large part of the society (more than one in four British people and almost one in three Poles) don't use the Internet.

Meanwhile, the results of the British surveys show more and more clearly a divide between those users who are more experienced, more active, and those who use the Internet only at a basic level.

**The mobile, the active, the creative**

In the British edition of the World Internet Project, Prof. William Dutton distinguished a group of next generation users. "These are people who access the Internet not only using their home PC or laptop. They have multiple devices: a tablet, smartphone, e-book reader, and they use at least some of them on the go, to access the Internet in a mobile way," explained Prof. Dutton.

**PROF. DUTTON ABOUT BRITAIN:** British next generation users are more likely to pay for services online, but when it comes to the question if it is appropriate to download music without paying, they are more likely to agree. So we've got a really complex set of attitudes about payment online

In the UK such users started to appear in 2007, but in the recent years their number has grown rapidly (one of the reasons being the smartphone and tablet revolution). "Next generation users move around and use the Internet instead of being tied to a home computer," said Prof. Dutton. This does not mean that home PCs are a thing of the past, they're still the main anchor to the Internet. "But readers, tablets, etc. extend and complement what you do at home. They allow you to bring the Internet with you and use it seamlessly elsewhere," said Prof. Dutton.

In Poland the mobile revolution is still to come. According to the Polish edition of the World Internet Project 2011, 10 per cent of Internet users go online using their mobiles (2 percentage points more than in the previous year). – "However, in groups which are the first to adopt new technologies, this percentage is much higher. For example, as much as 20 per cent of students access the Internet using their mobiles," said Arkadiusz Kustra from the research and analysis department of Gazeta.pl. As the Polish edition of the World Internet Project shows, in the last year there's been an increase in the number of people using laptops – from 20 to 28 per cent.

"Next generation users are much more likely to generate content. They visit social networking sites, post photos, post videos, they have their personal websites, write blogs," said Prof. Dutton. They are also more likely to use the Internet for entertainment: they download and listen to music. Of course, the Internet is also their basic source of information.

Dr. Justyna Hofmokl of Centrum Cyfrowe and Dr. Mirosław Filiciak of the Warsaw School of Social Sciences and Humanities are convinced that next generation users have already appeared in

Poland. They conducted an online survey on alternative forms of exchanging content in the Internet. "In this group, 39 per cent of the respondents said they accessed the Internet using mobile devices," said Dr. Hofmokl.

"A group of people who transfer at least a part of their social lives to the Internet is also more and more prominent. Some even say that "if you're not on Facebook, you don't exist," said Dr. Marek Troszyński of Collegium Civitas.

However, in the Polish edition of the World Internet Project those active users are not so well visible yet. "We must remember that the population of Internet users is still not fully developed," reminded Dr. Hofmokl. – "The website Nasza-Klasa was most successful in popularising the Internet in Poland, but it's a rather passive website. People joined it to meet their old friends, but that's basically it."

"We have two types of Internet users in Poland," argued Dr. Dominik Batorski of the University of Warsaw, a co-author of the Social Diagnosis research. "Some use it chiefly to develop their interests, to work or study, while the others treat it mainly as a source of entertainment. The first group are mainly people with better education, from larger towns. People who can't use the Internet to improve their life situation are not very much different from those who have no Internet access at all," said Dr. Batorski.

### Pirates out of necessity?

One of the things researched in the Polish edition of the World Internet Project 2011 was the scale of the online circulation of books, music and films. "Of course it often happens without the consent of people holding copyrights to these works," explained Arkadiusz Kustra of Gazeta.pl. According to the surveys, as many as two thirds of the Polish Internet users have ever accessed electronic cultural content in one way or another (using P2P software, file sharing sites such as Chomikuj.pl,

**PROF. DUTTON ABOUT POLAND:**
I think you are probably in the old Internet world, with most of the rest of Europe," said Prof. Dutton. "But you're moving in the direction of the new Internet world in that sense that users are becoming more active. You still seem uncertain about freedom of expression and whether Internet can be trusted as a medium

instant messengers, e-mail or data storage devices). Most of them are males and young people.

"Already two years ago we conducted a survey, together with Gazeta.pl, which told us that there's a huge group of people in Poland who regularly watch American TV series which can't be watched legally in Poland. They just download them from the Internet," reminded Dr. Mirosław Filiciak. The online research on the scale of piracy, which was conducted this year by Dr. Filiciak and Dr. Hofmokl, reveals that even one in four Internet users download such "free" content regularly.

According to Dr. Filiciak, in terms of scale this informal culture flow in the Internet can be compared to the official circulation in the real world, that is buying books, films, CDs, etc. What's interesting, as Dr. Hofmokl pointed out, the same people who exchange cultural content informally on the Internet are also ready to spend money on legal CDs, go to concerts, buy books. They even visit libraries.

Dr. Filiciak argued that piracy on the Internet is not a purely Polish problem. "From the Swedish edition of the World Internet Project we can find out that sharing files on the Internet is an important part of young Swedes' culture, just like writing blogs is important for the culture of young Swedish women," he said. "It is clear that this is not just an issue of respect for the law, but a kind of paradigm change."

"British next generation users are more likely to pay for services online, but when it comes to the question if it is appropriate to download music without paying, they are more likely to agree. So we've got a really complex set of attitudes about payment online," added Prof. Dutton.

"In Poland the discourse has long been dominated by the large publishers who cry that downloading music from the Internet is serious piracy. Much less is said about other examples of young artists for whom the possibility of downloading files means an opportunity to make a career," said Dr. Jan Zając from the University of Warsaw.

"Users want to decide for themselves what they consume, when and how. To some extent, the problem of piracy follows from the fact that business does not respond well to this demand. Business tries to maintain constant ways of delivering content, saying: we will give you this content, you can use it so and so. New models are necessary," pointed out Dr. Dominik Batorski.

"One of the critical issues in the future of the Internet and e-commerce is to figure out better business models that can be applied to the news, to music, and so forth. Unfortunately, rather than looking for new business models that are appropriate in the Internet age, people are trying to hold these old business models using law. That creates a really terrible atmosphere in which we try to delegitimise activities that are viewed as appropriate by most people," agreed Prof. William Dutton.

### New Internet, traditional values

"Today the centre of gravity of the Internet is shifting to Asia, where there are 40 per cent of all Internet users globally," said Prof. William Dutton. "A new Internet world is emerging. America and Europe are declining as a proportion of Internet users. Today, there are more Chinese online than there are Americans on the planet!"

Prof. William Dutton conducted the Global Values Project survey ordered by the World Economic Forum. He interviewed Internet users from 13 countries (Australia, New Zealand, Brazil, Canada, China, France, Germany, Italy, India, Mexico, South Africa, Spain, USA, UK) on various basic values. "I have good news for you: the new centre of gravity of the Internet is not necessarily going to result in a change in culture that will undermine freedom of expression and other values that are important to the Internet," said Prof. Dutton.

Some Internet users from Asia and quickly developing countries are even more willing to support some basic values in the Internet, such as freedom of expression, than people from the old

**DR. HOFMOKL:**
**Polish Internet users hardly use any services online. They are not even aware of these services. There should be more pressure on offices to take more initiatives of this kind, because the Internet should enter not only the world of entertainment but also the sphere of practical life**

Internet world. These new users are also more innovative and active than those from the old Internet world.

Which world does Poland belong to? "I think you are probably in the old Internet world, with most of the rest of Europe," said Prof. Dutton. "But you're moving in the direction of the new Internet world in that sense that users are becoming more active. You still seem uncertain about freedom of expression and whether Internet can be trusted as a medium. I think there's a moment of decision in Poland about where you're set in this worldwide map."

One of the important problems of the modern Internet is the issue of data privacy. "According to the results of the World Internet Project, 42 per cent of Polish Internet users do not have a problem with posting private information and photos on the Internet," said Arkadiusz Kustra of Gazeta.pl. "The percentage is a little smaller than last year. The increase in the popularity of social networking sites probably made the Polish people more aware of the consequences of uploading their lives to the Internet."

"Next generation users are less concerned about privacy," said Prof. Dutton. „The people who are most frightened of the Internet in terms of privacy or surveillance are those people who have never used the Internet. People who have experience online realise that they can do things without high risk. But they do not develop a blind trust in the Internet or silly optimism."

Around 30 per cent of Polish Internet users admitted to WIP interviewers that they fear their online activity is watched by the government or companies. "Prof. Jeffrey Cole, the head of the World Internet Project, wrote: 'today Big Brother is big business.' Large companies check what consumers do in the Internet and it seems that Polish Internet users are growing more and more aware of that fact," commented Kustra.

"It's very worrisome that you have the sense of being watched online," said Prof. Dutton. – But

this could be changing globally. If Jeff Cole is right, this can have a huge chilling effect on the future of the Internet. It could be absolutely a disaster if people do not try to protect the Internet as a place where you can have secure, anonymous, free and open expression and get access to information.”

“At a recent conference celebrating the tenth anniversary of the Oxford Internet Institute, the words ‘privacy is over’ could be heard in every second speech,” said Dr. Jan Zając. “According to Manuel Castells, the governments are all the time trying to control the Internet or at least watch closely what’s going on there. In Poland this has been clearly visible in the last months, when a lot of legislative initiatives and similar projects appeared.”

“Who are we really afraid of?” asked Dr. Marek Troszyński of Collegium Civitas. “In the first Polish edition of the World Internet Project the main threat to people’s privacy were clearly corporations. Now more and more people fear that our activity could be monitored by the government. This is a very philosophical question: about the limits of freedom of expression and other similar issues fundamental for the functioning of a society. It seems completely legitimate to me to treat the Internet as a public sphere where we should be responsible for what we say. This leads to a contradiction: on the one hand, Internet users are for freedom of expression, but against offending others. On the other hand, on the Internet there is a lot of hate speech and attempts of political parties to use it for their own interests. The question is how this organism can regulate itself.”

“We shouldn’t talk about the Internet as one space, but rather about different spaces within the Internet,” pointed out Dr. Dominik Batorski. “The internet needs places where there is no anonymity, but also places which ensure anonymity, to provide a forum for people living in authoritarian regimes or workers who are afraid to talk openly about breaking the law in their companies.”

**How to experience the Internet?**

According to the World Internet Project 2011, 62 per cent of Poles use the Internet, while 38 per cent don’t use it even occasionally. “But we should

remember that among these 62 per cent of people who use the Internet, 8 per cent are those who use it for less than an hour a week, which means: hardly ever,” said Arkadiusz Kustra. „On the other hand, in the group of people who do not use the Internet 41 per cent have somebody they ask to look different things up on the Internet. These people are therefore within the reach of information published on the Internet.”

What is worrying is that as many as 87 per cent of people who do not use the Internet do not feel they miss something, and only 4 per cent of them plan to start using the Internet within the next six months.

“People who don’t have access to the Internet don’t understand what they are missing,” explained Prof. Dutton. “The Internet is an experience technology. You can’t explain the Internet to somebody, just like you can’t explain a search engine or social networking. Nobody will understand this unless they start using it. People don’t understand the Internet until they experience it and they don’t think they need to experience it because they don’t think they need it. It’s a real conundrum.”

But even those who have been using the Internet for a long time don’t do it very actively. “The research shows that Polish Internet users hardly use any services online,” said Dr. Justyna Hofmokl. “Only a small percentage of people participated in the last census online, people don’t send tax returns via the Internet, although it’s really getting easier all the time. This means that they are not even aware of these services. There should be more pressure on offices to take more initiatives of this kind, because the Internet should enter not only the world of entertainment but also the sphere of practical life.”

“Paradoxically, although more and more of us use the Internet, our online world and our offline reality are growing more and more apart,” said Dr. Marek Troszyński. “It would seem that the Internet could be a great tool to do research on candidates in the recent parliamentary elections. It turns out, however, that again over 90 per cent of the votes were cast for people from the first places in the candidate lists. The potential of the Internet does not translate into our real lives as well as I would expect.”

# WHY ARE WE INVOLVED IN WIP?

Ladies and Gentlemen,

My name is Tomasz Józefacki and I am a director at Agora responsible for online activities of the company. For some time now we have been inviting world–famous authorities who can determine the direction in which the Internet is going. So far our invitations have been accepted by such people as Professor Manuel Castells of the University of Southern California, Professor Anne Nelson of the Columbia University and Professor Jeffrey Cole of the Annenberg School for Communication, the originator of the World Internet Project.

This year, we are organising the second edition of WIP, for which we have invited Professor William Dutton of the Oxford Internet Institute. Prof. Dutton has been researching the Internet for many years, he has always cooperated with very prestigious institutions having a scientific interest in the Internet: the Annenberg School for Commu-

**TOMASZ JÓZEFACKI**
AGORA SA

**For many years we have been propagating knowledge on what Internet is and how it changes the world around us – we try to make this knowledge familiar, gather and interpret it**

nication, and now the Oxford Internet Institute in the UK.

Why did Agora get involved in WIP? For many years we have been propagating knowledge on what Internet is and how it changes the world around us – we try to make this knowledge familiar, gather and interpret it. The Internet is an exceptionally important medium for a company like Agora, because it is the platform on which we are building our new media and multimedia reality. We try to find out how the Internet works as a medium, how it changes the general media reality, and how people use different media – for the Internet has a huge influence on the way we consume television, the press, radio. A completely new reality is emerging around us.

I would like to express my sincere thanks to the TP Group, who for the second time helped us in the WIP research – the project would not have succeeded like it did without this important support.

On the pages

worldinternetproject.net and badania.gazeta.pl

you can find the full reports of the "World Internet Project: Poland" from 2010 and 2011 with extensive commentary by Prof. Jeffrey Cole of USC Annenberg School for Communication (2010) and Prof. William Dutton of the Oxford Internet Institute (2011) and texts by Polish Internet researchers
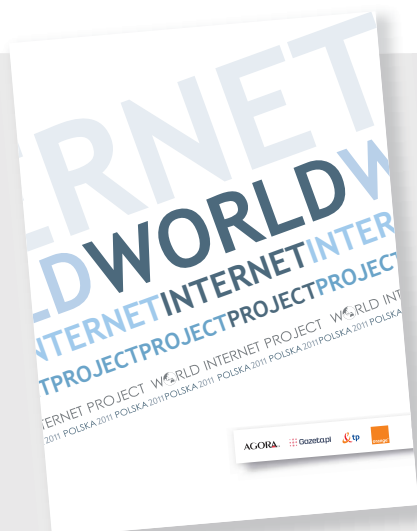
# QUALITY OF CONTENT IS DETERMINANT

Ladies and Gentlemen,

Agora is a very important partner for the TP Group, not only in this project. I will tell you an interesting story which shows why is it good to build relations going beyond business as usual.

You surely remember one of the most dramatic events in the history of Poland: the crash of the government plane on 10th April 2010. On that day we experienced in Poland a telecommunications crisis, which lasted 45 minutes. There was a black-out in all mobile networks and the landline network suffered from a significant deterioration in availability to all sorts of services. The problems affected not only mobile phones, media, but also providers giving access to platforms with news content.

Several weeks earlier we had completed a project with Agora which provided an innovative solution for managing the traffic of people accessing Agora's platform. We had built the first experimental Content Delivery Network (CDN) in Poland – based on eight dedicated servers, which replicate geographically the content on Agora's platform so that the users – recognised by their IPs – could obtain content from one of them. This

**PIOTR MUSZYŃSKI**
**VICE-PRESIDENT OF TP**

**The customer functions in the open Internet space, creating new customs, habits, needs, and we need to answer them. This is why this kind of research and our participation are so important**

made Agora the only online content provider who could be accessed all the time.

The conclusion is that without thorough knowledge, without research, without deep analytical approach we are not able to understand the evolution of users' behaviour patterns, which create the users' profiles. Besides, this is probably the most dynamically changing element of functioning of customers of both IT companies and operators of platforms generating content.

Access to the Internet itself is no longer a value. It's just a door which brings the customers closer to knowledge, to particular content. Today the quality of the Internet is determined by the quality of content distributed by the operators. This is why we are so interested in understanding where our market is going, how our customers are developing. As a telecommunications operator we are no longer a generator of events, we don't invite technological solutions. We try to research and respond to what the market and the customers create today. It is the customer who functions in the open Internet space, creating new customs, habits, needs, and we need to answer them. This is why this kind of research and our participation are so important.
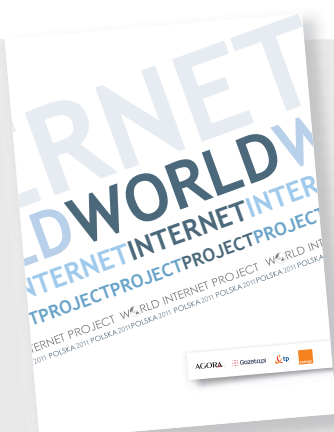
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# DISCUSSION ON THE RESULTS OF THE WORLD INTERNET PROJECT: POLAND 2011

**ARKADIUSZ KUSTRA:**

Ladies and Gentlemen,
I have the pleasure to present you the results of the second edition of the World Internet Project survey in Poland. My name is Arkadiusz Kustra and I represent the research and analysis team of the website Gazeta.pl.

First let me tell you about the research method. This year, just like last year, the survey was conducted by the IPSOS Institute, to which I would like to express my gratitude. A random sample of two thousand people were selected for the interviews, which were conducted using the CAPI method in the interviewees' homes.

Based on our experiences from the previous year, we introduced some improvements in the research method. The basic instrument of the survey is a very extensive questionnaire. Before we started the survey, we did some test interviews, watched them through a two-way mirror and modified our research tools to make the survey as easy for the interviewee as possible. Secondly, we improved the sampling method. We are very satisfied with these changes and we believe that the survey is representative for the population of Poles aged 15 or more, representative for the population of Internet users, people who don't use the Internet, and also has the dimension of a penetrative research – it precisely determines the proportion of people who do and don't use the Internet in Poland.

According to this edition of the World Internet Project survey, conducted just before the sum-

**ARKADIUSZ KUSTRA**
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RESEARCH AND
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TP GROUP
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**KUSTRA:**
**A simple divide between those who do and don't use the Internet is a gross simplification. Among the 62 per cent of people who use the Internet, 8 per cent are those who use it for less than an hour a week, which means: hardly ever**

mer holidays, 62 per cent of Poles use the Internet, while 38 per cent don't use it even occasionally. A simple divide between those who do and don't use the Internet is a gross simplification. Among the 62 per cent of people who use the Internet, 8 per cent are those who use it for less than an hour a week, which means: hardly ever. On the other hand, 41 per cent of those who do not use the Internet have somebody they ask to look different things up on the Internet. In a way, these people are within the reach of information published on the Internet.

In Poland, just like in many other countries, the mobile revolution is still to come. According to the survey, 10 per cent of Internet users access the Internet using their mobile phones, which is 2 percentage points more than in the previous year. This increase is not spectacular, so it seems that the revolution is still before us. However, it should come rather soon, as in some groups which are usually most likely to adopt new technologies this percentage is much higher, for example as many as 20 (rather than 10) per cent of students access the Internet using their mobiles. In the last year, there's been an increase in the number of people using laptops – as many as 28 per cent of Poles have a laptop computer (compared to 20 per cent last year). We should keep in mind, however, that the most popular device for accessing the Internet is still a PC.

It turns out that 87 per cent of people who don't use the Internet even occasionally do not feel they miss something. Only 4 per cent of them are

planning to start using the Internet within the next six months. As I said earlier, 41 per cent of people who don't use the Internet have somebody they ask to look different things up on the Internet, that is a proxy user. These results were quite surprising for us. Why do fewer people use the services of proxy users? Why is the number of people who plan to start using the Internet falling, and the number of people who don't miss the Internet – increasing? We have several hypotheses, for example a pessimistic one – that people who don't use the Internet are in a way drifting apart, they lost hope that they will learn to use this medium. Another theory is that those who did not use the Internet last year have split into two groups: some of them already use the Internet, and the other group, more obstinate, are people who refuse to do so. We should remember, however, that we have modified the sample, which could have influenced this change. How significant it was, we will certainly find out in subsequent surveys in the years to come.

**JAKUB RZEŹNIK:**

What is the position of the Internet among other media? As far as information is concerned, only the smallest percentage of Poles over the age of 15 view the Internet as an important or rather important source of information. At the same time, it is the only source of information whose significance is growing year by year – from 55 to 59 per cent. The other sources of information remain stable or their importance is decreasing. It is possible that the increase in the importance of the Internet is connected with the greater number of Internet users in our sample, but nevertheless it seems that this is a growing trend.

The leading medium, as a source of both entertainment and information, is television. As far as sources of entertainment are concerned, we have observed only one change in comparison with the last year – it's again the Internet, which went up by 8 percentage points. This means that the Internet is catching up with the press and they

**RZEŹNIK:**
**It turns out that the younger the age group, the easier it is to find people who use the Internet more than 10 hours a week. The older Poles are, the more likely they are to watch television over 10 hours a week**

are both in the third position. We can wonder if further increases will be possible given the stable position of the other sources of communication, information or entertainment, especially the dominating role of television.

In the field of communication, the clear leader is mobile communications, with the importance of landline telephones declining. The only means of communication whose importance is going up are those connected with the Internet: electronic mail and Internet phone services. Interestingly, despite the increase in the number of users of social networking sites, their importance is not growing.

We have also asked the interviewees to put five types of media in order, depending on how difficult it would be for them to give them up. As in the last year, TV ranked first, which means that Poles are most reluctant to give up this medium. The next places are occupied by mobile phones, radio, the Internet and, finally, landline phones. Most interesting are the results in individual age groups. In 2010, in the two youngest age groups, television was in third place, not first. Only teenagers viewed the Internet as a medium which would be most difficult to give up. This year, however, the Internet is the most important medium also for people in the age group of 20–24. This may be a sign that a group of digital natives is emerging in Poland, that is people who grow up in the environment of digital technologies, computers and the Internet. The Internet also becomes increasingly popular among the oldest users. This year, in the age category of 50–59, it overtook landline phones and now ranks fourth.

We also asked Poles over 15 how long they used TV or the Internet in a week. Just like in the previous year, most people spend long hours in front of TV, and a little smaller group in front of the Internet – more than 10 hours in a week. There's a strong and interesting trend connected with age – it turns out that the younger the age group, the easier it is to find people who use the Internet more than 10 hours a week. The older Poles are,

the more likely they are to watch television over 10 hours a week. These proportions are equal in the age group of 30–39, while last year they were equal in the group of around 25–39. The Internet is therefore winning new fans.

### Arkadiusz Kustra:

We have also examined Poles' reading habits and the impact of the Internet on reading traditional books. On average, Poles claim they read six books a year, while one third of Poles did not read any book whatsoever last year. Last year the interviewees claimed they read seven books a year. Internet users read more – seven books, while people who don't use the Internet – four books. Half of those who don't use the Internet have not read any book last year, while among Internet users this percentage is at the level of about 20 per cent. Does it mean that the Internet has a positive influence on reading books? Rather not. Internet users are simply a different group from those who don't use the Internet: they are better educated, more wealthy, they have probably always read more. We tried to determine the influence of the Internet on reading books by asking this year an additional questions: how has using the Internet influenced your reading habits. The majority – 61 per cent – answered that they read more or less the same number of books. Interestingly, 19 per cent answered that they read fewer books than before they started using the Internet, and only 2 per cent admitted they read more now. Another interesting thing is that among people who don't use the Internet the decline in the number of books read was larger, which means that the Internet is not the only cause of this drop.

The Internet gives a new life to books, but also to other cultural and art products, such as films or music – they can be easily distributed, transferred, copied, downloaded. Of course this flow is not always legal, it often happens without the consent of people holding copyrights to these works. This year we tried to examine the scale of this phenomenon, by asking the following question: "Have you ever used music, films or books in electronic form which have been obtained in one of the following manners:

■ downloading from file sharing sites, such as Chomikuj.pl,
■ downloading by means of peer–2–peer software,
■ sending via e-mail or instant messenger,
■ copying with the use of data storage devices (USB flash drives or CDs), etc."

The figures were quite high. Many people – for example 39 per cent of Internet users – say they use programs downloaded with peer–2–peer software. Almost half of them use files downloaded from file sharing sites such as Chomikuj.pl. As Dr. Mirosław Filiciak pointed out on seeing these results, this is a very delicate issue. We ask the interviewees about behaviours that are often illegal, so if they don't tell us the truth, it's more likely that they understate the answers rather than exaggerate them.

I think that for the first time we have captured the scale of informal flow of content in the Internet. In total, these ways of accessing films, music and books are used by exactly two thirds of Internet users. They are more frequently men and young people – teenagers and people before thirty use them on a large scale, more than half of them did it in the last month.

**RZEŹNIK:**
**Active shoppers – people buying things online at least once a week – are 6 per cent of Internet users. Almost 40 per cent of Internet users have not bought anything online so far**

### Jakub Rzeźnik:

Another important activity of Internet users is online shopping. The total number of people who do shopping online – 59 per cent – seems a lot. When we analyse these results more closely, it turns out that more than a half of online shoppers do it more rarely than once a month. Active shoppers – people buying things online at least once a week – are 6 per cent of Internet users. Almost 40 per cent of Internet users have not bought anything online so far. Women do shopping a little more frequently than men, and the most active group are people aged 20–39. Things most often bought online are clothes and shoes. One in two respondents claim that they bought something

from this category in the last year. The next places are occupied by household appliances, electronic devices and books, with drugs and food being the least popular categories.

Services look even worse. The most frequently bought services are tickets and hairdresser or beauty salon appointments. The figures, however, are similar to those for the products which are purchased least frequently. It can be supposed, therefore, that online shopping is still not a threat to traditional commerce, at least not in all categories.

**KUSTRA:**
**It can be supposed, therefore, that online shopping is still not a threat to traditional commerce, at least not in all categories**

ARKADIUSZ KUSTRA:

Finally, some results relating to the sense of privacy in the Internet. Firstly, 42 per cent of Polish Internet users have no problem with posting private information and photos online. This value has decreased but it is still high – the number of people w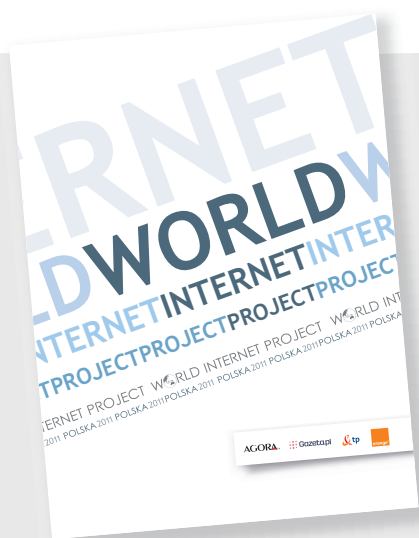ho have no such concerns is higher than those who do. However, this trend indicates that the recent increase in the popularity of social networking sites in Poland made the Polish people more aware of the consequences of uploading their lives to the Internet. Secondly, about 30 per cent of Polish Internet users are afraid that the government or companies monitor our activity online. Professor Jeffrey Cole, the originator of the World Internet Project, wrote: "today Big Brother is big business." Large companies monitor what consumers do online and it seems that Polish Internet users are slowly growing aware of this fact. Thirdly, half of the Polish Internet users agree with the statement that people should not be afraid to criticise the government in the Internet – and this group is getting smaller. Only one in two interviewees agree with this. In the USA this group amounts to 70 per cent.

On the pages

worldinternetproject.net and badania.gazeta.pl

you can find the full reports of the "World Internet Project: Poland" from 2010 and 2011 with extensive commentary by Prof. Jeffrey Cole of USC Annenberg School for Communication (2010) and Prof. William Dutton of the Oxford Internet Institute (2011) and texts by Polish Internet researchers

# NEXT GENERATION USERS: FOCUS ON UK AND POLAND

Thank you, everyone, for welcoming me here, and also for the invitation to speak at this event.

I congratulate the World Internet Project team in Poland. We have been doing surveys like you've just heard presented for a number of years and I know how difficult it is and how much effort it takes. Thanks also to the sponsors. This survey research is very difficult and expensive to do. Every additional survey means that the value of what you've done increases dramatically because you begin to see real trends as you have data over time. I'll speak about some of the trends we see in the UK and globally.

I was particularly impressed – and I'm sure you've had the same sense – that the team has reported to you what they found. They have not tried to impose any particular interpretation on the data. And I think that's ideal as you seek to develop your own interpretation of the findings.

I know you are not as interested in Britain as you are in Poland, so I'm going to try to briefly present some ideas that have come out of the trends I see in Britain and worldwide. And then we can talk about how Poland fits in developing trends in other countries around the world.

First I am going to talk about the 'next generation user'.

There is an old Greek aphorism saying "Know thyself". The problem within the computing world is that most people designing a computer system often think only about themselves. Many people concerned about better design say that if you design for telecommunications or computing you should think about the user. "Know thy user" rather than "Know thyself".

I think what we should start thinking about is designing for the future, for what the users are moving toward. "Know thy next generation user" is what I think we should be talking about now. Let me explain.

**PROF.**
**WILLIAM DUTTON**
OXFORD INTERNET INSTITUTE

Our survey is very similar to your World Internet Project survey – we have the same age group, we do multi-stage probability samples, so we can extrapolate to Britain as a whole. We have about the same number of people surveyed – about 2 thousand every survey year. We get multiple sponsors, including Ofcom, mobile phone company, O2, ITV, and the British Library. And we are a part of World Internet Project. We started in 2003, so by 2011, you begin to see major evidence of trends.

Everyone is talking about trends in internet use. But what are they? Of course they talk about iPads, iPhones, new smartphones and new tablet computers or the growth of mobile in a variety of countries. And we of course found evidence of a number of those trends. For example in the UK 3/4 of homes have a computer. But we saw growth of the number of computers in households. A lot of homes have three or more computers. I know we in this room are different from most people, as we are involved in communications, but there are times when I've had three or four computers on my desk. But 18 per cent of homes in Britain have three computers or more.

We also noticed growth in the number of devices generally. We see an up tick in the handheld readers – that was the first time we asked about readers in the Oxford Internet Survey and about 7 per cent of people have a reader. You can see significant growth in the use of tablet computers in the last several years but in the last 2 years the growth has been the most dramatic.

We were trying to make sense of this and we saw two things going on: one is the real growth in the mobile use of the internet. And also growth in the number of devices people are using. They are using readers, tablets. You saw growth of laptop computers in Poland as well. There is more portability, mobility over multiple devices, people are using them anywhere, anytime.

We have created an indicator that put together people who have multiple devices and use some of those devices to access the internet in a mobile way. And then we have discovered the next generation user, with 44 per cent of users in Britain being the next generation users. Then we worked backwards to estimate how this changed over time. And you could see that in began in 2007 but it has increased dramatically. Our whole report is about the rise of the next generation user. And I think the next generation user is coming in Poland.

It's interesting to me that this change is going on amid real stability. On one hand, you see that actual access to the internet has not changed dramatically over time. Even in 2003 59 per cent of people in Britain 14 years or older were using the internet. And it only has come to 73 per cent in 2011. The digital divide in Britain is still very significant. More than a quarter of people in Britain are not online.

But looking at that stability is deceptive because what we are seeing is really dramatic transformation in the way people are using the internet. You can see an increase of next generation users from 13 per cent of the British public in 2007 to 44 per cent in 2011. Patterns of use of the internet change even though use of the internet is not dramatically increasing.

Does it make a difference? I would argue yes, it does. We are finding a very strong relationship between patterns of access and the way people use the internet.

Here is an example. People who are using the internet as next generation users are much more likely to be generating content. They are visiting social networking sites, posting photos, posting videos, they have a personal website, they write a blog, they post creative work. All of it being a large difference between the first and the next generation users. I'm not saying that being a next generation user causes people to use the net differently. I suppose that if people want to post content and want to use the internet in the Web 2.0-type way, they may be more prone to have mul-

**PROF. DUTTON:**
**We have discovered the next generation user, with 44 per cent of users in Britain being the next generation users. I think the next generation user is coming in Poland**

tiple devices and carry them with them. There is an interaction between patterns of access and patterns of use that is quite important. But clearly, the next generation user is much more aligned with sort of Web 2.0 world in which users are generating content.

Also you can see dramatic differences between the first generation and next generation users in their use of internet for entertainment. Listening to or downloading music is much more popular among next generation users. They want to download and listen to music on the move, they download, create movies and so forth.

Less dramatic of a difference is in use of the internet for information. That's partly because almost everybody in Britain is relying more on the internet for information.

I think it's a very interesting difference between Poland and the UK. In Britain people trust the information they can get online about as much as they do on broadcast television. They actually trust information they get online more than newspapers and radio for example. Over 30 per cent of people in Britain say that the internet is essential for their information needs, they don't know what they would do if they don't have access to the internet because that's the first place they go for information for almost everything they do.

I often call this "the Obama syndrome". Barack Obama when he was elected president wouldn't know what to do because they wouldn't let him have his Blackberry. He didn't know what he was going to do without it because it became an essential part of his life, so they figured out how he could use the Blackberry as president.

Information needs are absolutely essential for growing proportion of people in Britain. It's very curious that people are less trustful about the information they get online in Poland. But it's a different body of content that we are talking about, different language and so forth.

Obviously next generation users are likely to use the internet more on the move – they use it

at their neighbour's house, internet cafes, on the move, at work, at school, at public libraries. The next generation user is moving around and using the internet instead of being anchored in the household.

Importantly, of course, and consistent with the survey in Poland, the PC in a home remains a very fundamental anchor to the internet. A lot of people thought that if you move towards appliances like tablet computers, they would replace the PC and internet would get "dumbed down", be less generative, less open, less creative. We are finding that that is not happening. The PC still remains – it could be a laptop, it could be a PC, but there is still a PC or laptop at home and it remains the anchor to the internet. But you have also a set of other devices that extend and complement what you do at home. Readers, tablets and so forth allow you to bring the internet with you and use it seamlessly elsewhere.

Is it just the "born digital" idea? I don't like the idea of being "born digital" because I've been using the internet since 1974 and I think today's kids have no idea of the internet's evolution. I was using the internet before they were a twinkle in anybody's eyes. Clearly it's not just the younger generation that is the next generation user. Students and employed are about equally likely to be next generation users. Where you really see a huge drop off the cliff is with retired or retirement age people.

Why are some students or some employed people not next generation users? One of the most significant factors is income. Higher income groups are much more likely to have multiple devices – smartphones, tablets, readers and laptop computers. They are much more mobile and versatile.

We have a new digital divide. In Poland a lot of people do not have a computer or access to the internet and they don't care about it, don't think it's of any value. But of course we know that hav-

ing access to the internet follows and reinforces social and economic divides in society. More educated people, wealthier people have access to the internet and they get advantages. People who do not have access to the internet do not 'get it' – they don't understand its benefits.

The internet is an experience technology. It is not that you can't explain the internet to somebody, just like you can explain a search engine or social networking. But nobody understands these technologies unless they use them. Once they do and have experience using that, they say: "Aha! Wow! I can do this or I can find this."

That's the biggest challenge of getting older people or non–users to use the internet because they don't understand it until they experience it and they don't think they need to experience it because they don't think they need it. It's a real conundrum of how to get over this experience gap.

There are other differences.

Next generation users are more likely than others to pay for services, but not a lot of people are paying for services. Paying for services is a new trend. We asked in our survey "is it appropriate to download music without paying". Next generation users are more likely to agree. So, next generation users are more likely to pay for services but they are also more likely to agree that it's often appropriate not to pay. Next generation users are more experienced internet users and they realize that there are some things you pay for and some things you shouldn't. There are some things that makes sense to pay for and some are charged too much or it is silly to pay for it, like for some types of information.

You can also see that next generation users are less concerned about privacy. Even though they use internet more, they generate more user–generated content than first generation users, they are less concerned about privacy.

It's again the experience technology – those who fear most the internet in terms of privacy or

> **PROF. DUTTON:**
> **The internet is an experience technology. Nobody understands these technologies unless they use them. Non-users don't understand it until they experience it and they don't think they need to experience it because they don't think they need it. It's a real conundrum of how to get over this experience gap**

surveillance are those who have never used the internet. People who have experience online realize they can do certain things without high risk.

But they do not develop a blind trust in the internet or silly optimism. Next generation users are more likely to share information online in order to get a service, like use a credit card to get something from a bookseller online.

They are also more supportive of freedom of expression but everyone in Britain is basically supportive of freedom of expression online. Most people believe that censorship has no place in a free society. Only 30–some per cent believe it is not true.

I worked with people at INSEAD and Comscore on a report for the World Economic Forum. We did an online survey called the Global Values Project. We surveyed 13 countries (Australia, New Zealand, Brazil, Canada, China, France, Germany, Italy, India, Mexico, South Africa, Spain, US and UK). What I found is the emergence of a new internet world with the center of gravity shifting to Asia and rapidly developing countries.

There is a developing global consensus on values and attitudes but some users in rapidly developing countries and in Asia are even more supportive of some basic values in the internet such as freedom of expression than are people in the old internet world. Those new users in the developing world and in Asia are actually more innovative and active than users in the old internet world. Asia has now over 40 per cent of internet users globally. The US used to be the center of the internet world and it still has high levels of penetration but there are more Chinese online now than there are Americans on the planet. North America and Europe are declining as a proportion of internet users relative to the rest of the world.

In every country we surveyed most of the users supported freedom of expression online. China was maybe the only country where there was a significant proportion of people who disagreed

that access to the internet should be a fundamental right for all people, but the percentage of people who were disagreeing was very small, less than 5 per cent.

What's interesting is that, while the new internet countries, such as India, South Africa, Mexico, China, have actually smaller proportion of users, their support of freedom of expression was higher than in many of the old internet countries, Germany, for example. I think that's positive news because that means that the new center of gravity of the internet is not going to necessarily result in a change that would undermine the freedom of expression and other values that are important to the internet.

You also see that China, Brazil, India have a dramatically high percentage of people who produce content online daily or weekly. Who's really low? The UK, Australia, New Zealand and even the US and Canada. The new internet world users are really actively creating content, they are also actively using the internet daily or weekly for communications.

Is Poland in the new internet world or the old internet world?

I think you are probably in the old internet world with most of the rest of Europe. You're more focused on Web 1.0 applications but I think you are moving in the direction of the new internet world, your users are becoming more active. But there is still uncertainty about freedom of expression, whether the internet is the trusted media. But it's clear that Poland is in the top 10 nations of Europe in terms of access to the internet.

Digital divides like that in Britain are still an issue, in fact we are seeing new digital divides like emergence of the next generation user.

There is healthy scepticism towards the internet in Poland. There is still not a decision made whether the internet is essential aspect of the information environment in Poland, as opposed to some other countries. There is concern over the key issues – privacy, trust, freedom of expression.

**PROF. DUTTON:**
**People who have experience online realize they can do certain things without high risk. But they do not develop a blind trust in the internet or silly optimism**

It's very worrisome that you have sense of being watched on-line and I think that could be changing globally. If Jeff Cole is right and "Big Brother is big business", this could have a huge chilling effect on the future of the internet. It could be absolutely a disaster if people do not try to protect the internet as a place where you can have secure, anonymous, free and open expression and get access to information you want and need.

But I think there is clearly evidence that Poland is at the tipping point – younger people in Poland are beginning to use the internet in ways that are closer to the next generation user.

**PROF. DUTTON:**
**I would put dollars to donuts that in one or two years you'll see rise in next generation users in Poland. I can't wait to see what happens in the future of the internet in your country**

Poland is also different in terms of the amount of information that is available in Polish content is probably significantly less than in English content online. And as more and more content is being produced for the internet and digitally through other media, the internet is going to reach a tipping point where it begins to be as essential for everyday information as it is in other countries.

I would put dollars to donuts that in one or two years you'll see rise in next generation users in Poland. I can't wait to see what happens in the future of the internet in your country.
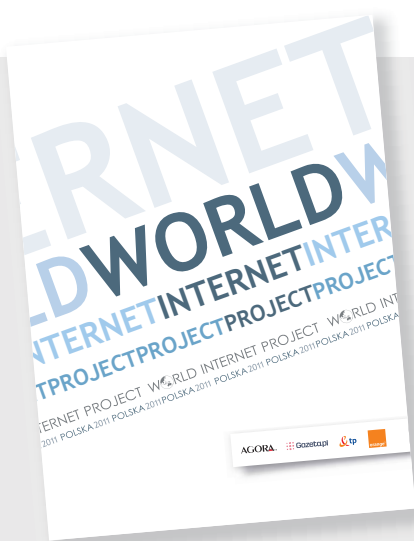
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# DISCUSSION OF POLISH INTERNET RESEARCHERS

### DR. JAN ZAJĄC:

We'll try to answer the eternal question about Internet in Poland: what it looks like, where it is going, what are the characteristic features of the Polish Internet and Internet users. But first I'd like us to talk about what Prof. Dutton referred to at the end of his speech, that is about the issue of next generation Internet users. Is such a category significant and is it significant for Poland? As many as 60 per cent of Poles use the Internet and there is a growing need to divide them somehow. Prof. Dutton presented an interesting idea. Apart from traditional devices, next generation users very often access the Internet using different kinds of mobile devices. They are much more likely to create their own content and post it online. It seems that many of these differences can be explained otherwise, for example by referring to basic demographic differences. The new generation of users are mainly people who are younger, richer, who have better Internet skills. Can you really see the category of next generation users in Poland?

### DR. JUSTYNA HOFMOKL:

I, personally, like this idea very much and I believe that such a group of people may emerge in Poland. This is an incredibly interesting group of people, who drive the development of the Internet. They are creative, active, they understand this medium, they can use it for different purposes, not only to have some fun or get in touch

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**DR. JAN ZAJĄC**
UNIVERSITY OF WARSAW

**PARTICIPANTS:**
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**DR. DOMINIK BATORSKI**
UNIVERSITY OF WARSAW

**DR. MAREK TROSZYŃSKI**
COLLEGIUM CIVITAS

**DR. MIROSŁAW FILICIAK**
WARSAW SCHOOL OF SOCIAL SCIENCES AND HUMANITIES

with friends. They are also conscious citizens who go online to gather information about what's going on in the world and in their immediate environment.

At Centrum Cyfrowe, Mirosław Filiciak, Alek Tarkowski and I conduct research on alternative forms of exchanging content and this is where we researched Internet users. Some of their features indicate that a group of next generations users is emerging in Poland. In this group, 39 per cent of the interviewees said they accessed the Internet using mobile devices.

But if we look at the results of the survey we are discussing today, it's true that there aren't many active users to be seen. We believe that the Internet makes people more active, that it supports democracy, that it lets people express themselves, fulfil themselves, be creative. Unfortunately, these results do not show it. We can worry about that, but we must also remember that we the population of Internet users is still not fully developed. The website Nasza-Klasa did more for popularising the Internet in Poland than all kinds of social campaigns or programmes of creating Internet access points. But Nasza-Klasa is a rather passive social networking site. People joined it to meet their old friends, but that's basically it. For me it's just the beginning of a long way.

### DR. DOMINIK BATORSKI:

I'm a little more sceptical about next generation users. Is it something else than just heavy users?

There are people in Poland for whom the Internet is the main medium. According to the World Internet Project, these are more than a dozen per cent of Poles.

When it comes to ways of using the Internet, what I find most important is not the intensity of use but what people actually do on the Internet. On the one hand, we have users who use it chiefly for practical purposes, to develop their interests, to work or study, while on the other hand there's a whole group of people who treat it mainly as a source of entertainment. This first group are mainly users who are better educated, come from larger towns, usually a little younger. The second group are mainly people who are not so well educated, come from less wealthy households. They too can use the Internet very intensively, but they use it mainly for entertainment, not to improve their life situation. People who spend some time online but can't use the Internet to improve their life situation are not very much different from those who have no Internet access at all.

**DR. MAREK TROSZYŃSKI:**

I'm convinced that it is necessary to categorise Internet users. It is getting more and more difficult to say that Internet users think this or that. That's why we need to perceive Internet users as a community which is varied inside. I think that the key dimension, probably in line with Prof. Dutton's idea, is using the mobile Internet. What is the Internet really? Is it a communication medium or a social space? When we think about people who come to work in the morning, read and send e-mails, make some personal arrangements online, and then turn the computer off, we are talking about a communication medium. But there's also an increasingly more prominent group of people who transfer at least a part of their social lives to the Internet, for whom the Internet is a social space, who have a strong need to be online. "If you're not on Facebook, you don't exist" – this saying shows us this line of thinking. The Internet reality is as real as the social reality, this is where these people maintain their social relations.

**DR. JAN ZAJĄC:**

The question is: what was first? Do these people have such needs and satisfy them online, or do they use the Internet more and more intensively and find new ways of using it?

**DR. MAREK TROSZYŃSKI:**

I think that the key factor is the easy access to technology, real possibilities that people have, the fact that we can hold a tablet computer instead of a sheet of paper, that I can use my mobile to update my status or take photographs of this conference and show them to all my friends.

**DR. MIROSŁAW FILICIAK:**

We certainly need to categorise Internet users, because comparing a person who uses the Internet once a week to somebody who takes their laptop to the toilet with them doesn't make much sense. We need attractive metaphors. I have noticed that although I have often criticised the 'digital natives' metaphor, as it is misleading – it concentrates on the age, people who were born in the Internet era – I very often use it myself, as it is very convenient. I think that the idea of next generation users is similar in this respect. This next generation suggests that the basic difference is age. Of course it very often is, but not always.

In the research conducted at Centrum Cyfrowe, which Justyna mentioned earlier, we used an online questionnaire and it turned out that all indexes connected with buying and reading books were 100-200 per cent higher than we usually assume for the Polish population. But if we look at the distribution across different age groups, it is surprisingly flat. Not only young people are active consumers of online content.

We also have to be careful not to fetishize the Internet, because when we're talking about using the Internet to improve the quality of life we

> **DR. FILICIAK:**
> We also have to be careful not to fetishize the Internet, because when we're talking about using the Internet to improve the quality of life we may be referring to a group of people who would raise this quality using other tools, if there were no Internet

may be referring to a group of people who would raise this quality using other tools, if there were no Internet.

### Dr. Jan Zając:

I think that an important thing is also the idea of 'invisible technology', that is technology that we take for granted, such as electricity. I think that computers and the Internet have become invisible technology only for a small part of the Polish society. It seems to me that most users still belong to the group who sometimes log on to the Internet, not to the group of people who are online 24/7. It is well-known that there are fewer mobile technology users in Poland than in the UK, especially when we're talking about smartphones.

A very interesting aspect of the idea of next generation users is also the large proportion of people who create their own content. The results of all earlier surveys, not only those conducted in Poland, clearly demonstrated that although the Internet is the technology of freedom, creativity, as Manuel Castells has been saying for more than a decade, only a very small percentage of users actually create anything, even on Web 2.0 websites. Most of them only watch. The Polish results show us that the percentage of those who create and upload their own content in the Internet is still relatively low. In Britain this percentage is much higher. The unique research conducted by Mirosław Filiciak and Justyna Hofmokl suggested that there are such people in Poland. Dominik Batorski, referring to nation-wide research, demonstrates that they are a marginal group.

### Dr. Dominik Batorski:

It's true that there's a number of such people in Poland, but it doesn't really show that using the Internet makes them much more active and ready to generate much more content. What Mirosław said is very important here: it's not the technology that changes a lot, it's what people have in-

**PROF. DUTTON:**
**Are next generation users only heavy users? I don't think so. We have to get away from a television paradigm, which is all about how much time you spend using different devices. The Internet changes the media ecology: the Internet feeds on the press, telephones, TV, and television more and more often uses the Internet**

side – their education, motivation, needs, cultural capital.

### Dr. Jan Zając:

Professor, would you like to add something?

### Prof. William Dutton:

I have heard some very good criticism and some support for my theory. I'm glad that it arouses some controversy. Of course I agree that we should try to categorise Internet users and we're trying to figure out what is the best category. Nobody suggested – that's a positive thing – to divide them into broadband users and not broadband users. In Britain everybody uses broadband, so it becomes almost irrelevant.

Are next generation users only heavy users? I don't think so. We have to get away from a television paradigm, which is all about how much time you spend using different devices. In the case of the Internet it doesn't matter how much time you spend online. You can watch TV for X hours a day and not use the Internet even once at that time, but imagine that you go somewhere to the end of the world and you don't need to worry about anything because you can always receive an e-mail or a message. I may even not use the Internet, but I know that in case anything happens I'm in touch.

TV and the Internet don't compete with each other as much as people would like them to. They don't compete because they complement each other. The Internet changes the media ecology: the Internet feeds on the press, telephones, TV, and television more and more often uses the Internet. We knew what happened to Gaddafi, what was happening during the Arab spring thanks to accounts and films which were posted online.

### Dr. Jan Zając:

We have heard much about the influence of the Internet on participation in culture, not only with regard to creating own content, but also with ref-

erence to participating in culture outside the Internet world, when the Internet is the source of information about concerts, events, new books, music albums, or when the Internet becomes a place where these goods can be accessed, also illegally. We have also heard that users have new creative possibilities but not all of them use them. What does it look like in light of research conducted in Poland?

### DR. MIROSŁAW FILICIAK:

The reason for conducting our research was a disappointment. A few years ago all of us expected that the levels of Internet users' creativity would grow. We know that this is still a marginal group, although our definition of creativity in the Internet has become so wide that it's almost enough to post an emoticon on somebody's blog, and still it turns out that not everybody is doing that, not everybody is posting comments. That's why we decided to examine not how Internet users generate content, but how they comment it, particularly how they redistribute content created by others, often using piracy practices.

Two years ago we conducted a survey with the research department of Gazeta.pl, called "TV without TV sets", which told us that there's a huge group of people in Poland who regularly watch American TV series which can't be watched legally in Poland. They just download them from the Internet. We wanted to have a look at this informal flow and map this informal media economy.

The results of our research surprisingly coincident with what we have seen here and are similar to the results of the Social Diagnosis survey. You could say that about one in four, one in five or one in six Internet users – depending on the content type – download "free", to call it mildly, content on a regular basis. But when we ask about having downloaded such content at any time in

### DR. BATORSKI:

Users must have a whole spectrum of choices how they want to consume given information, how they want to listen to music, when they want to watch films. it's the same people who download most content from the Internet and at the same time most often go to the cinema, most often pay for this content. These are people who have the greatest demand but at the same time they want to consume this content in a way that's convenient for them

the past, about contact with such activities or about indirect contact, that is using content downloaded by other household members, it turns out that these percentages reach, or even exceed, 50 per cent. Interestingly, just like Prof. Dutton said, next generation users are a little more likely to pay than first generation users, but at the same time the increase in the reluctance to pay is even higher.

This is a large group, around a half of the Polish Internet users. If we compare them with those Poles who are generally interested in the active use of cultural content, that is buying books, films etc., it turns out – I admit it was a bit shocking for us – that the informal sphere of culture circulation is similar, or maybe even a little larger, than the formal one.

### DR. JUSTYNA HOFMOKL:

I would like to add that these people not only exchange cultural content, including American TV series obtained in an illegal way, informally, but also spend money on legal CDs, go to concerts, buy books. What's more, they use such traditional forms of cultural exchange as libraries. It seems to me that this is the Polish group of next generation users.

I only ask myself if it is them we should focus on. They are those who are already "inside". A whole different question is what to do with this huge group of people who are not interested in the Internet and, as we can see, are not willing to change their mind. I believe this question is more important than the issue of next generation users.

### DR. JAN ZAJĄC:

For many people this is a shocking discovery: they can't believe that people sit in front of the Internet, watch films, listen to MP3 music, and then go to concerts, theatre, cinema – offline. Professor, have you seen similar results in other countries?

**PROF. WILLIAM DUTTON:**

Yes, I was surprised by the UK results as well. But, as you said, the dominant proportion of people don't want to pay for content. This contradiction is very interesting.

**DR. JAN ZAJĄC:**

Do you think that they can be made to pay or is the battle already lost?

**PROF. WILLIAM DUTTON:**

I think that one of the critical issues in the future of the Internet and e-commerce is to figure out better business models that can be applied to the news, to music, and so forth. Unfortunately, rather than looking for new business models that are appropriate in the Internet age, people are trying to hold these old business models using law. That creates a really terrible atmosphere in which we try to delegitimise activities that are viewed as appropriate by most people. Hopefully, the World Internet Project and other groups can focus more on thinking about business models that would be viewed appropriately by people.

**DR. JAN ZAJĄC:**

It seems to me that in the Polish reality the discourse has long been dominated by the large publishers who cry that downloading music from the Internet is serious piracy. Much less is said about other examples of young artists for whom the possibility of downloading files means an opportunity to make a career. These are people who think about their career, about their works in a completely different way and even encourage Internet users to download their works, share them with others.

**DR. MIROSŁAW FILICIAK:**

The topic is controversial, but the issues connected with piracy must indeed be thought through. I wanted to bring up one more topic. When we were analysing the results of our survey we had a lot of problems with the argument which always appears in Polish discussions on piracy, that Poles are corrupted by communism and as post-Soviet citizens we don't respect intellectual property. This is contradicted for example by the Swedish edition of the World Internet Project, where we can read that sharing files on the Internet is an important part of young Swedes' culture, just like writing blogs is important for the culture of young Swedish women. And we must remember that Sweden, and generally Scandinavian countries, are presented in different analyses as the most legalistic countries. It is clear that this is not just an issue of respect for the law, but a kind of paradigm change.

DR. TROSZYŃSKI:
Traditional thinking patterns don't fit well to the Internet reality. Internet users want to decide for themselves what is legal and what is not, what are the limits of freedom. The question is how this organism can regulate itself

**DR. DOMINIK BATORSKI:**

Users want to decide for themselves what they consume, when and how. How they want to receive certain content, in what conditions, using what devices and at what time. To some extent, the problem of piracy follows from the fact that business does not respond well to this demand. Business tries to maintain constant ways of delivering content, saying to the users: we will give you this content, you can use it so and so. We need other models. Users must have a whole spectrum of choices how they want to consume given information, how they want to listen to music, when they want to watch films. If we understand this, it becomes clear that it's the same people who download most content from the Internet and at the same time most often go to the cinema, most often pay for this content. These are people who have the greatest demand but at the same time they want to consume this content in a way that's convenient for them. And because they often don't have it, they resort to piracy.

**DR. MAREK TROSZYŃSKI:**

I agree with Dominik. The Internet gives much more power to users, but what we're dealing with

is a reality which is separate from the online world. I have similar experiences with the issues of freedom of expression and hate speech. From the perspective of our old world, there's an inexplicable contradiction of answers: on the one hand, people declare full support for freedom of expression, on the other hand almost three in four interviewees answer that insults on the Internet should be punished, hate speech must not be allowed on the Internet. On the one hand, full freedom of expression, on the other, however, we should keep an eye on those people and try to punish them. This shows that these traditional thinking patterns don't fit well to the Internet reality. Internet users want to decide for themselves what is legal and what is not, what are the limits of freedom.

### DR. JAN ZAJĄC:

We have smoothly switched to another topic: privacy, anonymity and the related issue of offensive content or hate speech. Privacy, anonymity – is it at all possible today? At a recent conference celebrating the tenth anniversary of the Oxford Internet Institute, the words 'privacy is over' could be heard in every second speech. On the one hand, people see that they upload various personal content to the Internet or websites such as Facebook. On the other hand, they appreciate the possibility to express their opinions, thoughts of make obscene statements freely. Who is a real threat to privacy? Jeffrey Cole argues it is the big business.

Manuel Castells and many other researchers, however, keep saying that it is the governments that are all the time trying to monitor the Internet or at least watch closely what's going on there. In Poland this has been clearly visible in the last months, when a lot of legislative initiatives and similar projects appeared.

Marek, what do you think about privacy in the Internet and about what should be available, acceptable online? To what extent should expression of political opinions, attitudes be monitored?

**DR. BATORSKI:**
**We shouldn't talk about the Internet as one space.**
**It would be more sensible to talk about different spaces within the Internet.**
**We need such places in the Internet, where there's much more privacy and anonymity**

### DR. MAREK TROSZYŃSKI:

This question could be reversed: who are we really afraid of? We are more and more concerned about the Internet being monitored by the government. In the first edition of the Polish World Internet Project the main threat to people's privacy were clearly corporations. Now more and more people fear that our activity could be monitored by the government. This is a very broad, philosophical question: about the limits of freedom of expression and other similar issues fundamental for the functioning of a society. It seems completely legitimate to me to view the Internet as a public sphere, that is a sphere where we should be responsible for what we say. On the one hand, we have this contradiction which I have already mentioned: Internet users support freedom of expression, but are against offending others; on the other hand, we can see hate speech or hostile language on the Internet and attempts made by political parties to use the Internet for their own interests. The question is how this organism can regulate itself."

### DR. DOMINIK BATORSKI:

Just like we can't talk about Internet users as a whole, we should not talk about the Internet as one space. It would be more sensible to talk about different spaces within the Internet. The Internet is more and more connected with everyday life and things that happen offline, so we need such spaces where there's no anonymity and where the privacy is much smaller. On the other hand, we need such places in the Internet, where there's much more privacy and anonymity. We should ask not whether privacy or anonymity are necessary in the Internet but rather how different spaces within the Internet should be organised.

### DR. JAN ZAJĄC:

Could you give us an example of a space where you think anonymity is very important?

**DR. DOMINIK BATORSKI:**

Some spaces related to public debate should be completely anonymous, especially when we're talking about authoritarian regimes or workers who are afraid to talk openly about breaking the law in their companies.

**DR. JAN ZAJĄC:**

Anonymous discussions on political topics are mainly held by youth sections of political parties and companies hired by parties to conduct negative campaigns. Regular users usually don't want to have anything to do with it, because it is generally considered to be a dirty business. On the other hand, more and more sensible discussions are moved to environments where everybody uses their own name, one of the reasons being the intention to raise the quality of the debate. Though I agree about the demands as such, I don't really see an environment or place in the Internet where such anonymous discussions could be held in a sensible way.

**DR. MAREK TROSZYŃSKI:**

I agree. Most of us will probably agree that discussions held on Polish Internet forums are far from reasonable. And this means that we are retreating from this area, leaving the public space to youth sections of political parties or companies that run their marketing activity there, or people with extreme views who flood the Internet with hateful statements.

**DR. JAN ZAJĄC:**

At the end of the discussion I would like to ask everybody to sum up with one or two sentences what you found especially important, interesting. From my point of view, these are two issues. First of all, many people emphasised that we need to stop thinking in the terms of Internet users as a homogenous group, we should think about different subgroups in this category. One proposal is the group of next generation users. The second issue which I find important, and still not well understood, is the fact that creativity in the Internet is still a rare phenomenon, with commenting

and sharing content being much more frequent forms of activity.

**DR. DOMINIK BATORSKI:**

I would like to refer to one thing we haven't discussed, namely a change in the structure of Internet users in the last years. In 2003 the percentage of Internet users in the age group 16-24 amounted to 40 per cent, now it's 19 per cent. Eight years ago, 30 per cent of Internet users were pupils and students. Today they make up only 14 per cent. This change is dramatic and has a large influence on what the Internet looks like, what content is produced for it, what content is published on the web. It is increasingly more adapted to an average user. The issue of privacy and anonymity also responds less and less to the needs of those users who have had long experience in the Internet, those who are better educated, richer. Rather, it answers the needs of more average users. The Internet and how it is regulated will change in reaction to the changes in the structure and needs of people who use it. We will see this both here, in Poland, and in the International arena, due to the fact that the percentage of Internet users from our culture is constantly decreasing, as Prof. Dutton pointed out.

> **DR. HOFMOKL:**
> **We expect Internet users to be active and creative, but they must have something to create things from, they must have access to source materials**

**DR. JUSTYNA HOFMOKL:**

Our discussion shows that Internet users must be researched, described and analysed, because they are not a homogenous group. Today talking about access to the Internet is certainly not enough. We need to take care of Internet users if we want to shape this group. Research shows that Polish Internet users hardly use any services online. Only a small percentage of people participated in the last census online, people don't send tax returns via the Internet, although it's really getting easier all the time. This means that they are not even aware of these services. There should be more pressure on offices to take more initiatives of this kind, because the Internet should enter not only the world of entertainment but also the sphere

of practical life. Another thing is availability of Polish content. We expect Internet users to be active and creative, but they must have something to create things from, they must have access to source materials.

**DR. MAREK TROSZYŃSKI:**

Paradoxically, although more and more of us use the Internet, our online world and our offline reality are growing more and more apart. The reason for this may be the fact that we have increasingly larger expectations from the Internet. It would seem that the Internet could be a great tool to do research on candidates in the recent parliamentary elections. It turns out, however, that again over 90 per cent of the votes were cast for people from the first places in the candidate lists. The potential of the Internet does not translate into our real lives as well as I w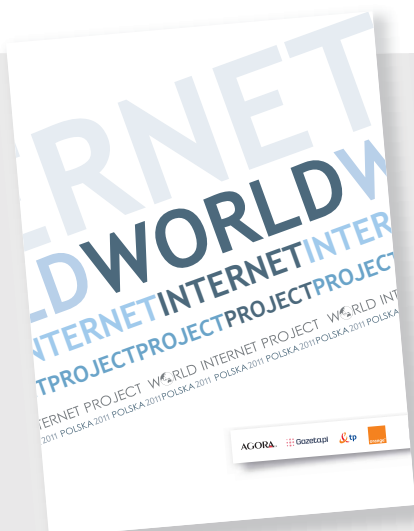ould expect. We also have an important cognitive problem, because we saw in several cases that people answered things which seemed radically contradictory. As a researcher I can say: our questions are not right, our categories do not fit this world.

**DR. TROSZYŃSKI:**
We saw in several cases that people answered things which seemed radically contradictory.
As a researcher I can say: our questions are not right, our categories do not fit this world

**DR. MIROSŁAW FILICIAK:**

As a culture researcher I am happy because this is one of those surveys which increases our knowledge on the flow of cultural content in the Internet. I am glad that this research is regularly repeated and that now we have not only the "Social Diagnosis" but also other surveys which let us monitor the changes of certain trends across time and compare the results with other countries. The growth of our knowledge about what goes on in the Polish Internet gives us hope that regulations relating to the Internet in Poland, but also politicians' attitude to the Internet and business models will be based on knowledge and recognition of reality rather than ideological assumptions.

On the pages

worldinternetproject.net and badania.gazeta.pl

you can find the full reports of the "World Internet Project: Poland" from 2010 and 2011 with extensive commentary by Prof. Jeffrey Cole of USC Annenberg School for Communication (2010) and Prof. William Dutton of the Oxford Internet Institute (2011) and texts by Polish Internet researchers