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## ABSTRACT

This research report examines the unique preferences, attitudes, motivations, and practices of ethnic Internet users, particularly African Americans and Hispanic Americans, discussing implications for marketing to U.S. ethnic communities. Data come from field research collected between August-November 2000. Researchers partnered with popular ethnic web agencies that targeted online African Americans and Hispanics with ethnic-specific web content. Visitors were solicited to participate in the study. Participants completed a 34-item survey instrument in either English or Spanish. A total of 3,499 surveys were completed by 766 African Americans, 1,439 Hispanic Americans, and 1,294 general market respondents (predominantly Anglo). Results indicated that the interplay of culture and technology shaped the behavior and attitudes of respondents in many ways (how they obtained access, the type of online activities they engaged in, and their degree of trust and comfort in the inner workings behind a computer screen in order to provide personal information). Online African Americans, Hispanic Americans, and general market populations thought and behaved very differently from each other and in ways that were consistent with the patterns of others with their ethnic and cultural backgrounds. A high number of African American and Hispanics were found to use the Internet for career advancement and professional development, information on family, relationships and health, and for educational purposes, while fewer than one third of African American and Hispanic respondents reported having purchased products over the Internet. (SM)

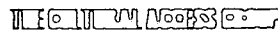


# ETHNICITY IN THE ELECTRONIC AGE

## LOOKING AT THE INTERNET THROUGH A MULTICULTURAL LENS

**Cultural insights into tomorrow's mainstream markets**

**A REPORT PRODUCED BY:**



**A division of Access Worldwide Communications, Inc.**

**Thomas Tseng, Director of Marketing**

January 2001

U.S. DEPARTMENT OF EDUCATION  
Office of Educational Research and Improvement  
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

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## ■ ABOUT CULTURAL ACCESS GROUP

Founded in 1986, *Access Worldwide's Cultural Access Group* provides analysis and strategic direction as to how our clients should most effectively target and approach high-potential customers in high-value market segments. Our growing consulting business is supported by our research capabilities, which offer detailed definitions and analyses of the market segments targeted by our clients. We have twice been recognized by American Demographics Magazine as one of the "Best 100 Sources of Marketing Information."

We have conducted numerous qualitative and quantitative market research throughout North and South America in more than 20 countries. Our research services encompass market area profiles, target audience segmentation, marketing and advertising effectiveness, culture market opportunity assessment, new product concept development and testing, awareness, attitude and usage studies, opinion polling, readership and viewership studies, and customer satisfaction surveys.

*Cultural Access Group* provides an unparalleled understanding of the complexities involved in developing marketing campaigns directed at the U.S. Hispanic market. We bring unique insights to language segmentation, generational diversity and differences stemming from country of origin that contribute to the growing cultural diversity within today's increasingly diverse U.S. market.

We have designed and executed both traditional and non-traditional customer marketing plans for numerous clients. Most recently, we have been in partnership with AC Nielsen, developing the innovative Hispanic Homescan™ pilot program in Los Angeles, the first truly representative Hispanic consumer panel in the United States.

Without question, the U.S. economy is in the midst of a dramatic transformation. Led by the Internet, new ways of communicating, learning, and purchasing are emerging from technology, and these changes are radically altering the social and economic landscape for millions of Americans nationwide.

By simply observing the shifting nature of how consumers shop, how people now communicate with each other, and the manner in which people gather news content – the pervasive reach of technology is ubiquitous. As this technological revolution continues to unfold, the vast potential of the Internet leads many to believe that the U.S. will continue to experience greater levels of prosperity.

Despite compelling evidence indicating Americans are utilizing, and benefiting from, the Internet like never before, the “digital divide” continues to be a real challenge for many segments of our society. While technology has become an essential tool in our everyday lives, as well as the linchpin of the “New Economy”, not every group has experienced the same rates of digital inclusion, and concerns over these disparities persist, particularly among U.S. ethnic communities.

However, there are plenty of reasons for optimism. Favorable trends indicate growing technological use among African Americans, Hispanics, and other ethnic groups. According to the U.S. Department of Commerce, tremendous gains in Internet access and utilization have been made over recent years. For example, between 1998 and 2000, Internet access for African American households rose from 11.2% to 23.5%, while Hispanic households rose 12.6% to 23.6% during the same period.<sup>1</sup> Although they still fall behind the general market population, participation levels will continue to climb rapidly into the immediate future.

As Internet use rises among African Americans and Hispanics, the issue of digital access will diminish over time as the prevalent feature defining the online experience for many ethnic groups. Instead, what will come to determine the digital presence for an emerging base of ethnic users are *cultural factors*, which are rooted in the unique identities and sensibilities of America’s increasingly diverse ethnic population.

Identifying these unique ethnic and cultural attributes and understanding how they shape online behavior is the impetus for this study. Despite the ‘color blind’ nature of the Internet, a major theme of *Cultural Access*

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<sup>1</sup> U.S. Department of Commerce. *Falling Through the Net: Toward Digital Inclusion*. October 2000.

*Group's* overall research philosophy is that culture plays a powerful, defining role for how ethnic consumers behave and purchase goods and services. Ethnic Internet users are no exception.

A new paradigm for marketing is surfacing along with the Internet's emergence. Key cultural drivers are emerging in today's online multicultural marketplace. In our digital future, identifying these drivers now will have tremendous ramifications for ethnic marketing in future years to come.

This *Cultural Access Group* research report is the first, of what will be many, attempt(s) to capture the unique tastes, preferences, attitudes, motivations, and practices behind ethnic online users and to realize their implications for marketing to U.S. ethnic communities – among the fastest growing market segments in the United States.<sup>2</sup>

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<sup>2</sup> U.S. Dept. of Commerce Minority Business Development Agency. *The Emerging Minority Marketplace. Minority Population Growth: 1995 to 2050*, September 1999.

### The Defining Technology For An Entire Generation

During the advent of information computer technologies in the late 1960s, it was unfathomable to imagine the Internet becoming the defining technology for an entire generation. Yet today, the Internet has become the fastest growing electronic communication tool ever used. Astoundingly, the majority of its explosive growth has occurred in only the past seven years.

As recently as 1997, there were approximately 19 million Americans using the Internet. By 1999, however, that number surpassed 100 million.<sup>3</sup> Even after six years of incredible growth, new Internet usage remains high, as new users from around the globe log onto the World Wide Web daily. In the first quarter of 2000 alone, it is estimated that more than five million Americans joined the online world.<sup>4</sup>

Undeniably, the Internet is expanding to become the most widely used form of technology in the world. Its capacity to carry information grows exponentially with each passing month. E-mail, one of the most basic applications of the Internet, continues to expand at a remarkable rate. The number of electronic mailboxes jumped 84% to almost 570 million in 1999.<sup>5</sup>

### An Emerging Multicultural Marketplace

Like the technological revolution, changing demographic patterns are having an indelible impact in the U.S. marketplace. Immigration and a rapidly growing multicultural population are drastically altering the ethnic complexion of the U.S. These trends reveal that ethnic communities are making significant inroads into mainstream American society as both consumers and contributors, though they manage to retain their unique cultural attributes.

For example, as the number of African Americans, Hispanics, Asians, and Native Americans increase, greater levels of purchasing power are also being attained. It is estimated that the purchasing power possessed by U.S. ethnic communities will total \$860.6 billion in 2001 -- \$420.7 billion more than in 1990. Additionally, multicultural purchasing power now accounts for 12.2% of the nation's total and is projected for even further growth.<sup>6</sup> With this increasing spending clout come different consumption patterns. Unlike the general market, for instance, Hispanics spend more on food consumed at

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<sup>3</sup> UCLA Surveying the Digital Future report, 2000.

<sup>4</sup> Ibid.

<sup>5</sup> Ibid.

<sup>6</sup> Selig Center for Economic Growth, Terry College of Business, University of Georgia, "Buying Power at the Beginning of a New Century: Projections for 2000 and 2001," July-August 2000.

home, telephone services, transportation, and apparel. In contrast, African Americans spend more on groceries, utilities, personal care products, and luxury items, to name a few.

In addition to greater levels of spending power, ethnic businesses are emerging as potent forces in the national economy. Among the fastest growing segments of the business community, ethnic entrepreneurs from a vast array of cultural backgrounds are reshaping the social and economic fabric of cities and regions across the country. Increasingly, their considerable impacts are being felt in such areas as job and wealth creation.

According to Census Bureau figures, there are currently over 3.25 million ethnic-owned firms operating within the U.S., although most experts agree the actual number is far greater. Officially, these business establishments generate in upwards of \$495 billion in annual revenues and employ over 4 million workers. Furthermore, the number of these firms have increased 168 percent over the last decade, while their revenue growth has been even more astounding – 343 percent over the same period.<sup>7</sup>

Even as the U.S. ethnic population continues to soar and make impressive social gains, achieving economic opportunities like never before, disparities are still apparent, especially “electronic” ones. The degree to which these emerging ethnic groups are converging with the expanding opportunities offered by the digital world has become a crucial issue receiving national attention.<sup>8</sup>

#### Beyond the Ethnic Digital Divide

The challenge of realizing technology access across the diverse strata of society has been branded the “digital divide”. This phenomenon describes the disproportionate under-utilization of computers and the Internet by people of disadvantaged, socio-economic backgrounds who, for various reasons, are disconnected from technology resources. These digital divisions are observed along income levels, educational levels, race and ethnicity, gender, age, and even geography.

Some evidence demonstrating the digital divide include:

- ♦ Households with incomes of \$75,000 and higher are more than 20 times likely to have access to the Internet than those at the lowest income levels.
- ♦ African American and Hispanic households are approximately one-third as likely to have home Internet access as other households.

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<sup>7</sup> Ibid.

<sup>8</sup> <http://www.digitaldivide.gov>



- About one-third of the U.S. population uses the Internet at home, while only 16.1% of Hispanics and 18.9% of African Americans use the Internet at home.
- Although a rapid amount of African American and Hispanic users are participating online, the overall divide is increasing as Internet utilization among the general population has also rapidly increased.

Discussions of ethnicity and the Internet are never followed far behind a dialogue of the digital divide. Although the challenges represented by the digital divide are real, it is the contention of this study that the most important dimension for understanding ethnic Internet usage is *culture*. Like spending patterns and social activities, cultural factors also determine online behaviors and practices. This is supported by recent evidence reporting that differences in income and education between ethnic groups do not fully account for the digital divide. Estimates of what Internet access rates for Black and Hispanic households would be if they had income and education levels comparable to the general U.S. population show they only account for one-half of the differences.<sup>9</sup>

Understanding these ethnic-cultural factors, rather than focusing exclusively on digital *access*, will be the key to reaching the emerging base of online African Americans and Hispanics – *in addition to* Asian Pacific Islander, Native American, and other ethnic populations. Hence, the intention of this study is to capture the behaviors and attitudes that have surfaced by ethnic Internet users as a result of increasing Internet use.

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<sup>9</sup> U.S. Department of Commerce, *Falling Through the Net: Toward Digital Inclusion*, October 2000.

## OBJECTIVES

The overall objective of this research is to profile how the U.S. multicultural market, particularly African Americans and Hispanics, is using the Internet and engaging this new electronic medium, in contrast to the general market. As Internet accessibility increases and its patterns of use evolve, what ethnic/cultural attitudes and preferences emerge as a response?

Secondly, the study endeavors to determine the impact of culture versus online experience on usage and attitudes. An underlying hypothesis about our research is that cultural factors influence online behavior. It determines how the Internet is employed as a source of new information, a connection tool with friends and family, and a resource for purchasing products and services.

Third, the study seeks to understand the reaction of ethnic Internet users to ethnic web sites targeted at them. Since there is an increasing recognition of an online ethnic community, a plethora of ethnic-specific web sites have emerged over recent years. Many of these sites provide a variety of in-language and/or cultural-specific content: news, gossip, entertainment, chat, etc. The level of satisfaction received by online ethnic users is measured and explored in this research.

Lastly, a final objective is to determine, from the research data gathered, the marketing implications to effectively reach online African Americans and Hispanics. Identifying what cultural attitudes, experience levels, and access exists also reveals the motivations and drivers of online ethnic users. This has wide and compelling implications for strategically targeting and penetrating the online multicultural market.

This report is the product of three months of field research, data collection, and analysis between mid-August to November 2000. The research was designed to capture the Internet's expanding base of ethnic users by tapping into the capabilities offered by the medium itself. Online surveying was the primary methodology utilized, since the goal was to reach out to as many Internet users as possible.

In order to reach the broadest base of ethnic Internet users possible, *Cultural Access Group* partnered with some of the most popular ethnic web agencies that target online African Americans and Hispanics with ethnic-specific web content. (See Acknowledgements for a complete list of participating web sites.) Agreements were secured with these companies to place a banner link prominently on their opening home page. These banner links solicited web visitors to participate in the study and led directly to a survey form that users could voluntarily fill out in order to contribute. The survey instrument was comprised of 34 questions, and respondents had the option of completing the survey in either English or Spanish.

**Survey.com**, an Internet-based research firm in California administered the online surveys and managed the data collection. For comparison purposes, additional surveys were administered to **Survey.com's** general market consumer panel, comprised of primarily non-ethnic general market Internet users.

The final outcome yielded a total of 3,499 surveys, which were completed between mid-August and mid-October, 2000. The final results included:

- 766 online African Americans respondents
- 1,439 online Hispanics respondents
- 1,294 online general market respondents

Although this study is heavily skewed towards visitors of ethnic web sites (except for general market respondents), the final results allow us to glean unprecedented insights into the "virtual" lives of ethnic Internet users. However, this study does not claim to be representative of the entire universe of ethnic Internet users, since it comes from a self-selected respondent base. Nevertheless, readers will find many of these results practically useful and insightful, providing a glimpse into the attitudes and practices of ethnic Internet users that have never been perceived before.

I. RESPONDENT PROFILE

*Profile of online African Americans, Hispanics, and general market Internet users*

African Americans	Hispanics	General Market
95% born in the U.S.	14% born in the U.S.	92% born in the U.S.
55% have children at home	89% have children at home	37% have children at home
39% homeowners	39% homeowners	62% homeowners
Avg. household income = \$47,600	Avg. household income = \$43,800	Avg. household income = \$54,700
76% employed full-time	73% employed full-time	61% employed full-time
83% some college or higher	68% some college or higher	79% some college or higher
76% female/24% male	33% female/67% male	35% female/65% male
Avg. age = 35 yrs. old	Avg. age = 39 yrs. old	Avg. age = 38 yrs. old

African American

- 95% of online African American respondents are born in the U.S.
- 55% of online African American respondents have children at home.
- 39% of online African American respondents are homeowners.
- Avg. household income of online African American respondents is \$47,600.
- 76% of online African American respondents are employed full-time.
- *Online African American respondents are highly educated.* 83% of online African American respondents indicate that they have had some college education or higher – higher than any other group.
- *A large percentage of online African American respondents are female.* 75% of online African American respondents are female; only 24% are male. Higher by far than any other group.
- The average age of online African American respondents is 35 years of age.

## Hispanic

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- ***A very small percentage of online Hispanic respondents are born in the U.S.*** Only 14% of online Hispanic respondents are born in the U.S. This demonstrates that a considerable base of online Hispanics are likely to be less acculturated and Spanish-dominant/preferred.
- ***A large percentage of online Hispanic respondents have children at home.*** 89% of online Hispanics have children at home, far higher than online African Americans and online general market users. Hence, family and children's content is likely to be a higher priority for online Hispanics.
- 39% of online Hispanic respondents are homeowners.
- Avg. household income of online Hispanic respondents is \$43,800.
- 73% of online Hispanic respondents are employed full-time.
- 68% of online Hispanic respondents indicate that they have had some college education or higher.
- 33% of online Hispanic respondents are female; 67% are male.
- The average age of online Hispanic respondents is 39 years of age.

## General Market

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- 92% of online general market respondents are born in the U.S.
- ***Fewer general market respondents have children at home, indicating that many do not have families.*** 37% of online general market users have children at home.
- ***General market respondents possess high rates of homeownership.*** 62% of online general market respondents are homeowners – much higher than online African Americans or Hispanics.
- General market respondents possess the highest average household income compared to African Americans and Hispanics. Avg. household income of online general market respondents is \$54,700.
- ***Fewer general market respondents are employed full time.*** 61% of online general market respondents are employed full-time.

- *Online general market respondents are highly educated.* 79% of online general market respondents indicate that they have had some college education or higher.
- 35% of online general market respondents are female; 65% are male.
- The average age of online general market respondents is 38 years of age.

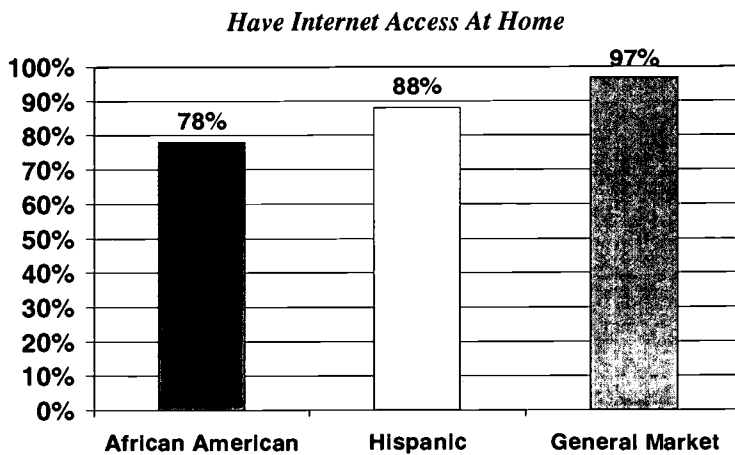
#### Summary of Respondent Demographics:

- Most online African Americans and general market respondents were born in the United States, whereas most online Hispanic respondents were born outside the U.S., predominantly in Latin America. Most Hispanic respondents are either Spanish dominant/preferred or bilingual, as 97% of Hispanic respondents indicated they spoke Spanish “very well” or “well”.
- Unlike many general market users, most online Hispanics and African American respondents have children at home. Thus, many online Hispanics and African Americans have more children and family considerations as it pertains to the Internet than general market respondents.
- Most general market respondents are homeowners unlike most online African Americans and Hispanic respondents. Additionally, most general market respondents have a much higher average household income than online African Americans and Hispanics, although fewer are employed full time.
- Overall, education levels among all respondent groups are high. African American respondents are the most highly educated; most possess some college education or higher. General market respondents and online Hispanics follow them in educational attainment levels.
- There is a considerable presence of online *female* African Americans, whereas most online Hispanics and general market respondents were male. Since most online African American respondents were female, different needs and preferences are expressed for online services.

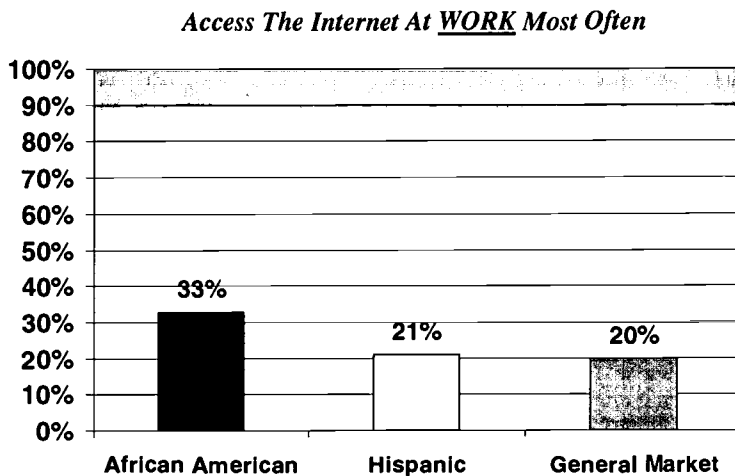
**MAJOR FINDINGS**

II. INTERNET ACCESS:

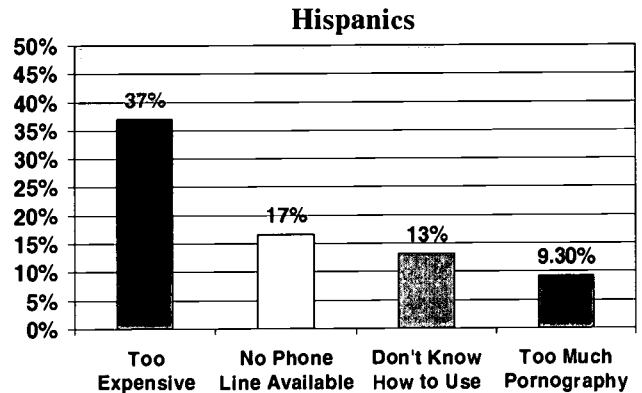
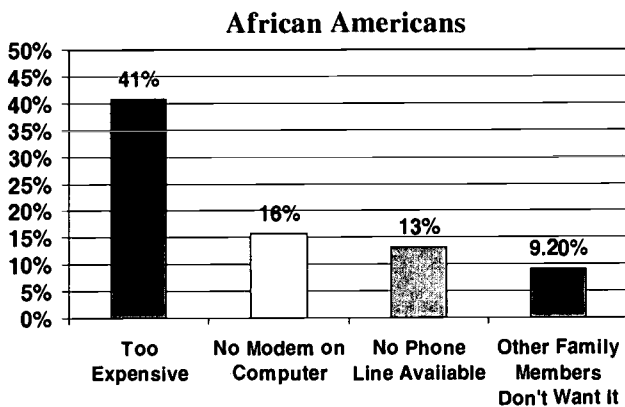
- ♦ *African American and Hispanics have slightly lower in-home access than the General Market.* Although these differences are not as wide compared to the general population, they are significant. Less than 80% of African American users have in-home access and 88% of Hispanics possess in-home access; in contrast, 97% of all General Market users have in-home Internet access.



- ♦ *African Americans access the Internet at work more often compared to Hispanic and general market respondents.* Approximately one-third of online African Americans use the Internet most often at work; in contrast, 21% of Hispanics and 20% of general market users use the Internet most often at home.

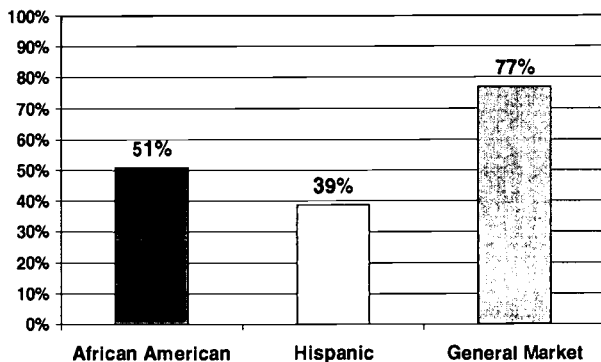


- *Cost is the greatest deterrent to African American and Hispanics acquiring in-home access.* There are significant disparities for in-home Internet access between African American and Hispanic households that are under \$40K vs. over \$40K. The same is true of the Hispanic community. No differences exist between users in the General Market. The biggest reason cited for lack of in-home Internet access is cost: 41% and 37% of African American and Hispanic users, respectively, indicate that Internet access is “too expensive”.

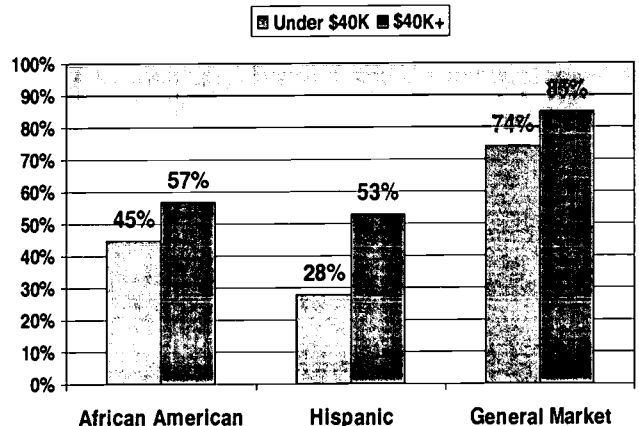


- *African American and Hispanics have significantly less longevity online than general market users.* Compared to the General Market, African American and Hispanic online users have far less experience. 51% of Blacks and 39% of Hispanics have over 3 years of Internet experience in contrast to 77% of General Market users. These disparities are even greater when household income is factored in.

Have 3+ Years' Experience Using The Internet



3+ Years' Internet Experience By HH Income





- ♦ ***Online African Americans and Hispanics spend significantly less time online than general market users.*** On average, those African American and Hispanic respondents who report spending 15 or more hours per week are 36.5% and 35.6%, respectively. Over half of general market users on the other hand (54.6%), report spending 15+ hours per week online.

#### Summary of Respondent Internet Access:

- Due to cost issues, online African Americans and Hispanics are much more likely to utilize the Internet more frequently at work rather than at home, since their in-home access is slightly limited compared to general market users.
- Since the Internet is utilized more frequently at work, the likelihood of engaging in personal online commerce is less likely than other activities more closely associated with work, such is the case among online African American respondents.
- Accessibility to the Internet has a profound impact on usage and attitudes. It determines the level of online experience users possess. Since some ethnic Internet users have limited accessibility due to cost factors, they also have significantly less longevity. Lack of access, especially in-home access, influences how each group will utilize the Internet.
- In general, online African Americans and Hispanics spend fewer hours online per week than general market users. Again, this can be attributed to limited in-home access, but there may be other factors at work as well: lack of trust, inadequate content available, and lack of compelling content (these are discussed in subsequent sections).
- Thus, lack of access certainly will certainly play a role in the level of participation among African Americans and Hispanics. However, while increasing online access via greater degrees of economic achievement will increase online activity and longevity, the range and type of activities among online ethnic users will be certainly influenced by culture.



III. INTERNET USAGE

As discussed at the outset of this report, cultural attitudes shape Internet practices. So does experience. From the information revealed in the previous section, we can observe that general market users have much more experience to draw from in using the Internet than African Americans and Hispanics.

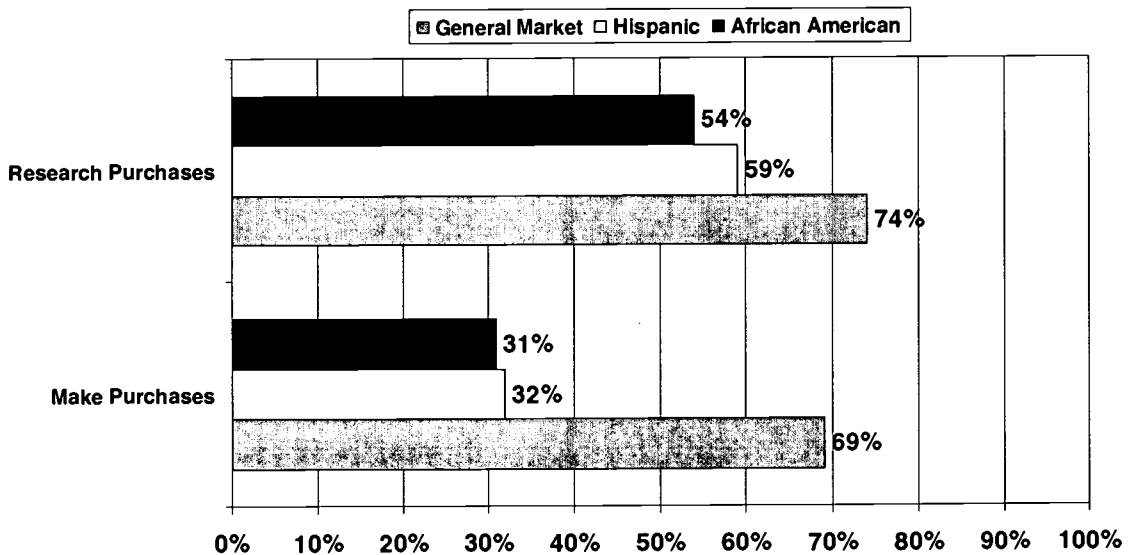
Since attitudes and experience levels interact in ways that determine online usage patterns, a central hypothesis of this study is that as African American and Hispanics gain more online experience, some behaviors will mirror the General Market; however, due to their unique attitudes toward the technology and its content, other behaviors will remain uniquely theirs.

A. E-commerce Activity

- Longevity on the Internet is a clear factor in determining propensity to engage in e-commerce practices.* Thus, we would expect that as online African Americans and Hispanics gain more experience in using the Internet, they will likely use the Internet more for shopping and purchasing. However, there are attitudinal factors stemming from culture that may affect this behavior as well.

	African American		Hispanic		General Market	
	3+ Years Experience	Less Than 3 Years Experience	3+ Years Experience	Less Than 3 Years Experience	3+ Years Experience	Less Than 3 Years Experience
<b>Research Products</b>	62%	46%	65%	55%	78%	60%
<b>Purchase Products</b>	43%	19%	42%	26%	75%	50%

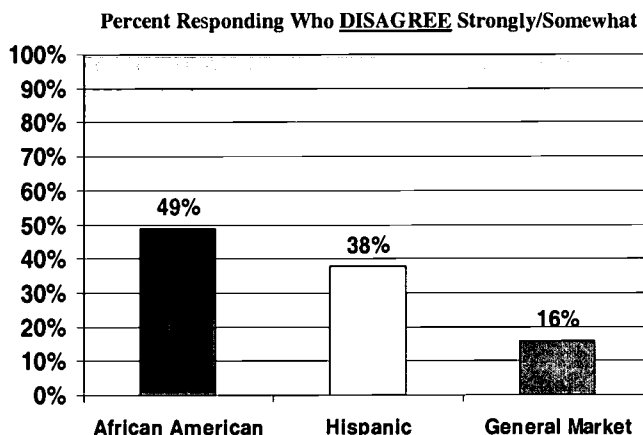
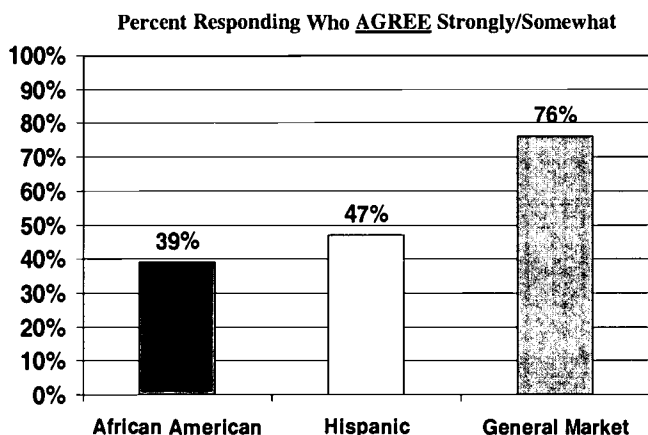
- ♦ *Internet users who have more experience (3+ years) are far more likely to research and purchase products than those with less experience.* This is true across all ethnic categories. Many survey participants indicated that they use the Internet to research products for potential purchasing, although African Americans (62%) and Hispanics (65%) do so at significantly lower rates than the general market (78%).
- ♦ *Although “experienced” online African Americans and Hispanics are more likely to purchase products than those without such experience, they engage in purchasing activity at far lower rates than the general market.* From the table above, we can observe that 42-43% of online African Americans and Hispanics with three plus years of experience have purchased products. In contrast, 75% of general market users with the same level of experience purchase products online.



- ♦ *In general, only 31% of African American users and 32% of Hispanic users have purchased products over the Internet; while 69% of the general market users have made purchases over the Internet.*
- ♦ *Online African Americans and Hispanics are significantly less comfortable purchasing using their credit cards over the Internet.* Reflecting these disproportionate purchasing patterns, over 70% of general market users feel comfortable with purchasing over the Internet with a credit card and agree strongly that they are comfortable with this process. Only 39% and 47% of African Americans and Hispanics, respectively, agree

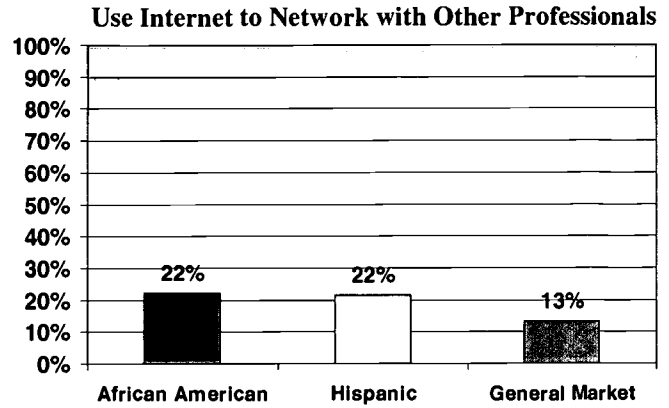
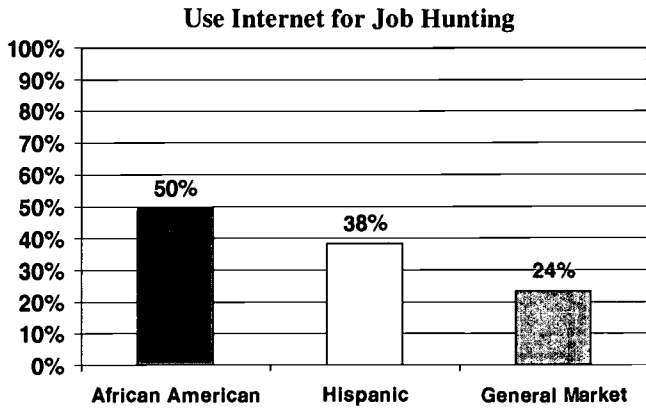
strongly with these purchasing sentiments, reflecting a greater degree of skepticism in using their credit cards online.

**“I’d Be Comfortable Purchasing With My Credit Card On The Internet”**

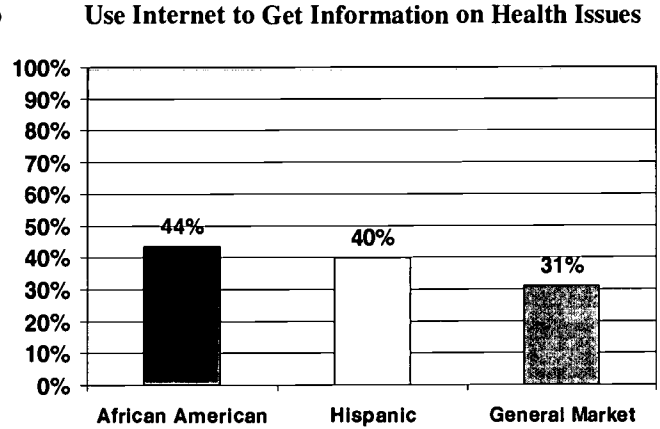
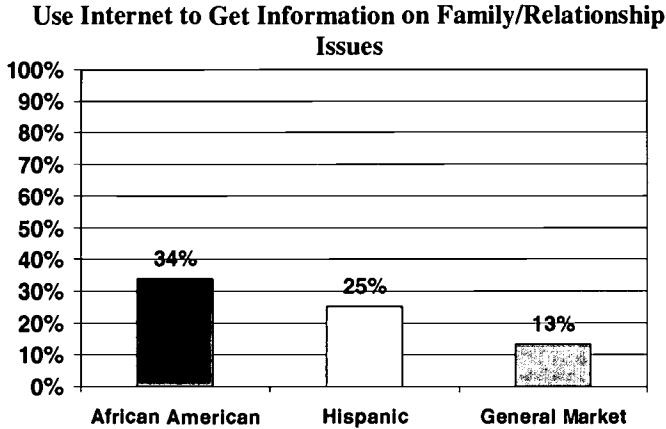


**B. Online Content and Activities**

- Compared to the General Market, African American and Hispanics are more likely to use the Internet for the following:
  - ✓ Career advancement
  - ✓ Getting information on family and health issues
  - ✓ Education purposes
  - ✓ Community/social activities
  
- *African Americans and Hispanics look to the Internet for career advancement and professional development resources.* A very high number of African American users (50%) use the Internet for job hunting, 38% of Hispanics use it for similar purposes, but only 24% of general market users look for jobs over the Internet. African American users and Hispanic users also use the Internet to network with other professionals slightly more than the general market.

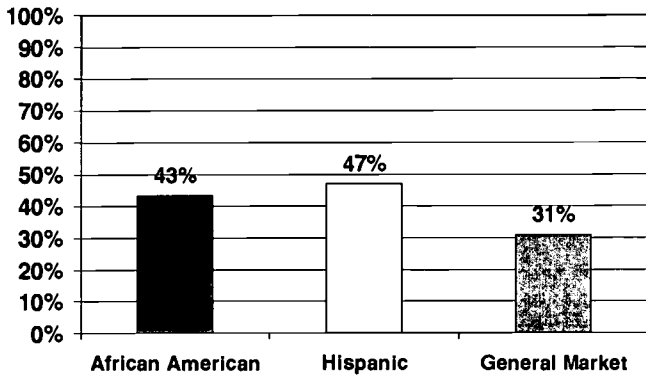


- African Americans and Hispanics seek resources for information about family/relationships and health.* A greater number of African Americans (34%) and Hispanics (25%) use the Internet to get information on family/relationships issues than the general market (13%). This also reflects user patterns in using the Internet to gain health information: 44% of African Americans and 40% of Hispanics compared to 31% general market users, respectively.

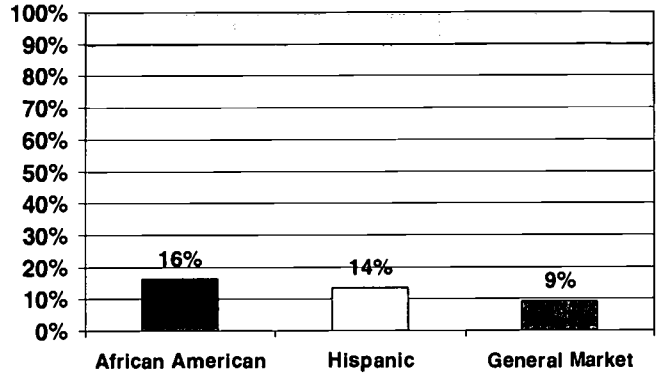


- African Americans and Hispanics are more likely to utilize the Internet for educational purposes.* A greater number of African Americans (43%) and Hispanics (47%) use the Internet for school research than the general market (31%).

**Use Internet for School Research**

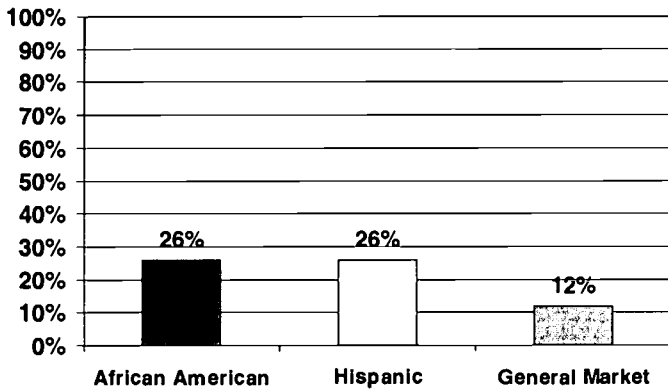


**Use Internet to Take Online Classes**

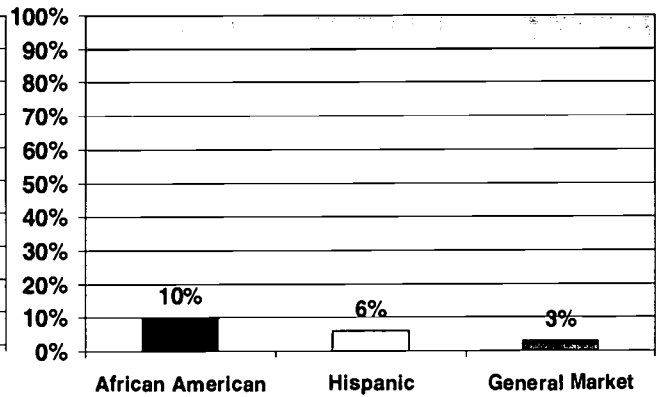


- African Americans and Hispanics are more likely to utilize the Internet for socializing purposes. A greater number of African Americans and Hispanics use the Internet for specific social purposes than the general market. 26% of both African Americans and Hispanics use chat rooms, in contrast to 12% of general market users.*

**Use Internet for Chat Rooms**



**Use Internet for Dating**



### C. African American and Hispanic Usage Profiles

#### Hispanics

Compared to African Americans and the General Market, Hispanics were significantly more likely to:

<u>Top Hispanic Activities</u>	<u>Hisp</u>	<u>AA</u>	<u>GM</u>
Look Up International News	78%	28%	35%
Look Up Local News	68%	59%	46%
Look Up National News	67%	50%	58%
Do Work For Their Job	52%	33%	41%
Look Up Sports Info	45%	34%	36%

- *Hispanics are more likely to use the Internet to look up international news, local news, national news, and sports information content.*
- *Hispanics are also more likely to use the Internet to do work for their job.*

Compared to African Americans and the General Market, Hispanic respondents indicated they were significantly less likely to:

<u>Bottom Hispanic Activities</u>	<u>Hisp</u>	<u>AA</u>	<u>GM</u>
Explore Hobbies and Interests	32%	47%	55%
Play/Download Games	28%	38%	44%
Search TV/Movie Listings	25%	34%	32%
Use White/Yellow Pages	26%	33%	36%

#### African Americans

Compared to Hispanics and the General Market, African Americans were significantly more likely to:

<u>Top African American Activities</u>	<u>AA</u>	<u>Hisp</u>	<u>GM</u>
Do Job Hunting	50%	38%	24%
Explore Family/Relationship Themes	34%	25%	13%

- African Americans are much more likely to use the Internet for job hunting purposes or explore family/relationships.

Compared to Hispanics and the General Market, African Americans were significantly less likely to:

<u>Bottom African American Activities</u>	<u>AA</u>	<u>Hisp</u>	<u>GM</u>
Seek Computer/Tech Info	30%	44%	58%
Research Stocks/Investments	23%	31%	30%
Look Up Adult Content	11%	16%	17%

#### Summary of Respondent Internet Usage:

- Online African American and Hispanic respondents engage in e-commerce at significantly lower rates than the general market. The level of experience with the Internet, or online longevity, is a determining factor whether ethnic users will engage in e-commerce activities. Although online African Americans and Hispanics increasingly engage in online purchasing with greater longevity, they are doing so at substantially lower degrees than the general market.
- Most online African Americans and Hispanics are far less comfortable using their credit cards over the Internet than the general market.
- Respondents of all ethnicities use the Internet for e-mail, weather, maps, news content, and product information.
- Online African Americans focus a great deal more on career advancement and professional development, family/relationships, education, entertainment, and social-communications. They are less likely to seek computer/technology information online or utilize the Internet for some financial purposes (i.e., research stocks/investments).
- Online Hispanics utilize the Internet to a great degree as an information resource: news content, especially international news, local and national news, sports, and to do job-related work. They are less likely to explore the Internet as a social/communications tool, a source of entertainment, or an instrument for financial transactions.



IV. INTERNET ATTITUDES

As we have seen in the results of Internet usage patterns, different behaviors and practices between ethnic groups are influenced by online exposure, access and longevity. In addition, the differences are shaped profoundly by ethnic/cultural attitudes. The level of trust indicated and the types of perceptions and ideas embraced express these attitudes. Depending on these factors, attitudes may limit online participation and the range of online activities explored.

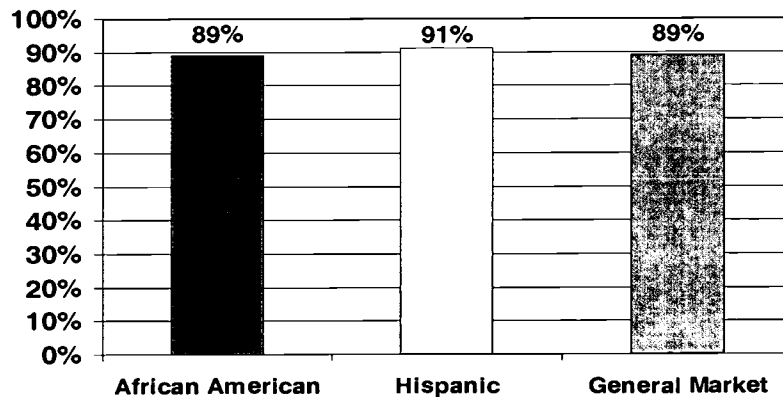
- For example, African American respondents were twice as likely to view computers as a luxury item than either Hispanic or general market respondents.
- One-half of African American respondents reported that the Internet should be censored, twice the level of Hispanics and the General Market.
- African American and Hispanic respondents were nearly 3 times and 5 times as likely, respectively, than the general market to mention negative perceptions as the main reason for not having in-home access. This hints at the level of trust and acceptance that Internet access provides as positive tool.

However, there are commonalities between all ethnic groups surveyed:

- *Respondents were generally positive about their Internet experience.* All ethnic groups, between 89%-90%, strongly agreed that they greatly enjoyed using the Internet whether it is for work or leisure. Only 3% (for all ethnic groups) indicated that they had negative experiences with the Internet.

***“I Enjoy Navigating/Surfing The Internet”***

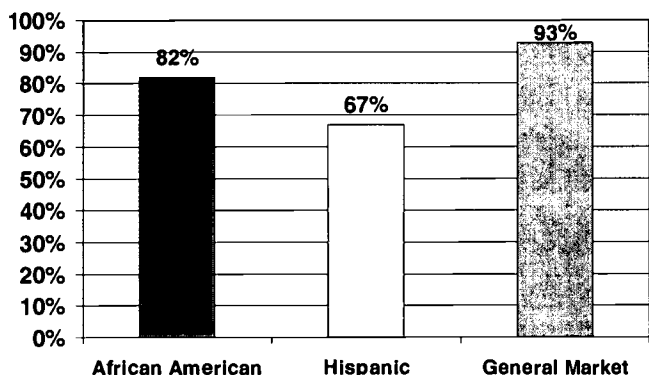
Percent Responding Who AGREE Strongly/Somewhat



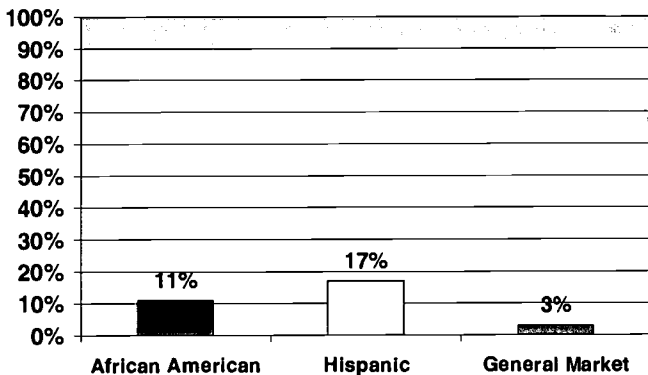
- *Respondents were confident in their own Internet abilities.* All marks were high, particularly among the general market, which indicated the greatest number of those who “strongly agree” they were good at operating the Internet. 82% of African Americans agreed with the statement, while 67% of Hispanics agreed. Among all groups, Hispanics felt the least comfortable with their abilities to navigate the Internet, suggesting that the online Hispanic market potential is only just being realized.

**“I Am Very Good At Navigating/Surfing The Internet”**

Percent Responding Who AGREE Strongly/Somewhat



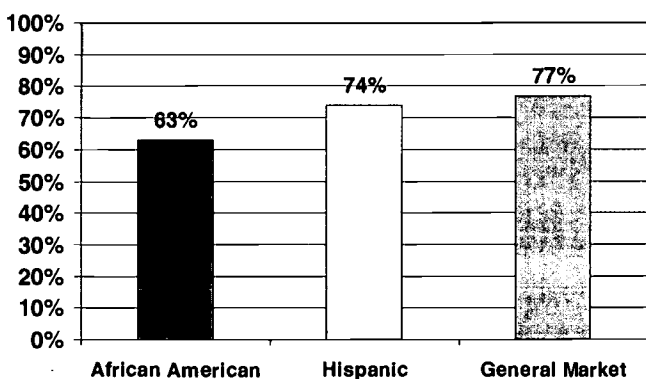
Percent Responding Who DISAGREE Strongly/Somewhat



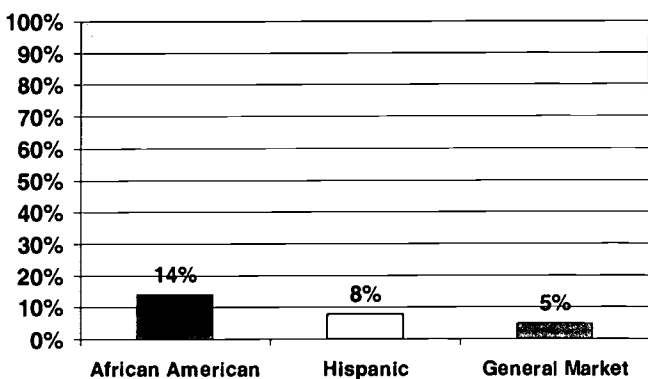
- *Most respondents were in general agreement that the Internet has made their lives easier.* 77% of general market users and 74% of Hispanic respondents agreed with this notion. At a much lower rate, 63% of African Americans agreed that their lives were made easier by the Internet, suggesting that the level of comfort and trust in the technology is still being developed in the Black community.

**“The Internet Has Made My Life Easier”**

Percent Responding Who AGREE Strongly/Somewhat

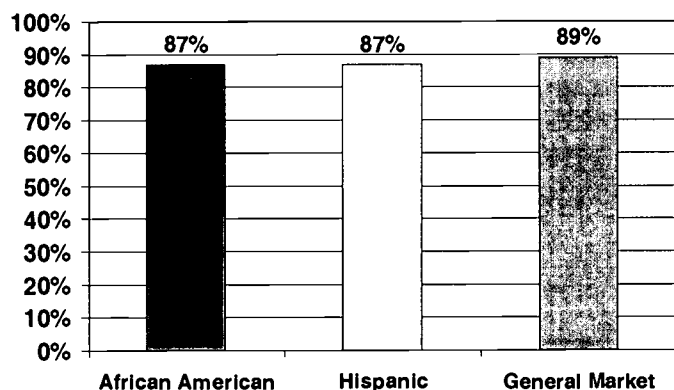


Percent Responding Who DISAGREE Strongly/Somewhat

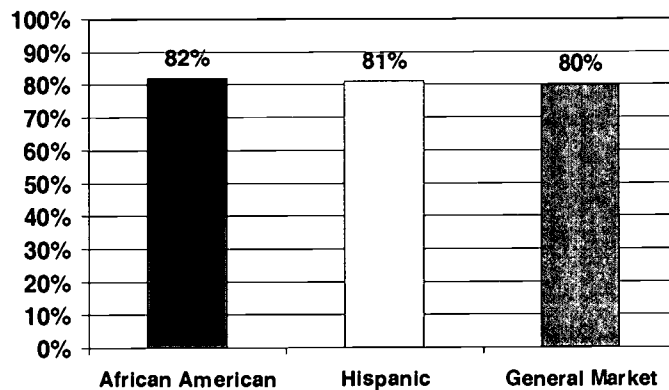


- *All groups were very concerned about their children's access to the Internet.* 87% to 89% of all users stated that parents should limit their children's access to certain content on the Internet. Furthermore, between 80%-82% of all respondents stated that parents should limit the time their children spent on the Internet as well.

**"Parents Should Limit The Access Their Children Have To Certain Content On The Internet"**



**"Parents Should Limit The Amount Of Time Their Children Spend On The Internet"**

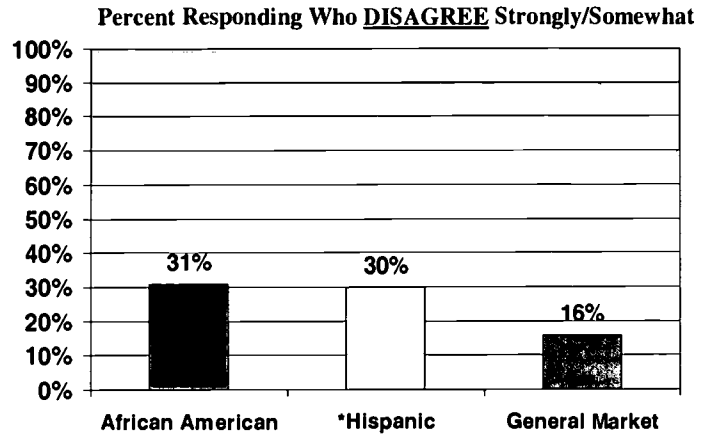
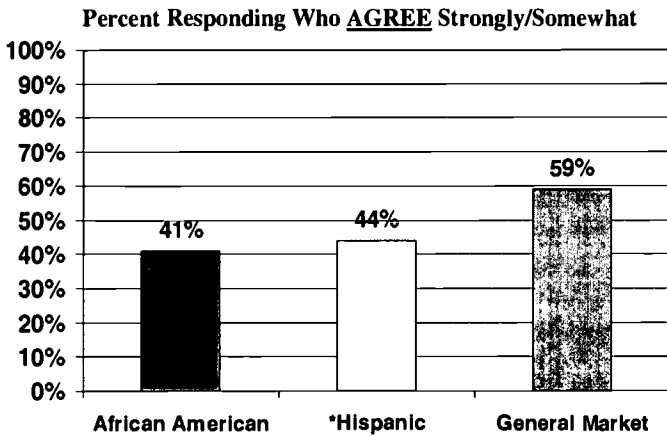


#### Attitudinal Differences: Race Matters

In discussing the Internet, significant differences exist with respect to race, society, and economic opportunity. Generally, Hispanic respondents were the most exuberant in praising the positive impacts of the Internet. However, this did not apply to Hispanics responding in English, demonstrating that different acculturation levels also determine differential attitudes among Internet users. Among all the groups studied in the survey, online African Americans were the most skeptical about the Internet.

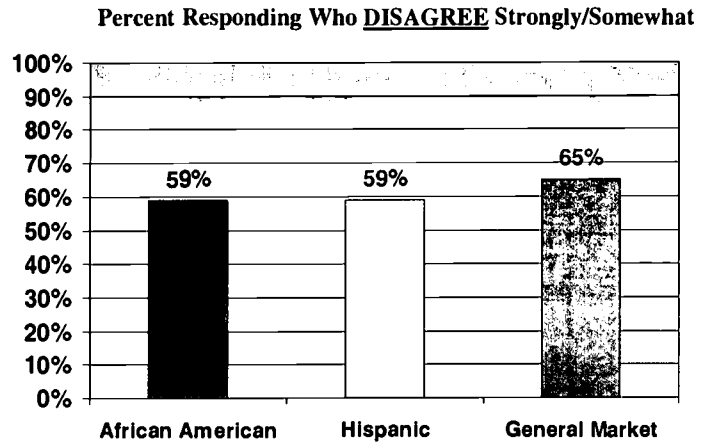
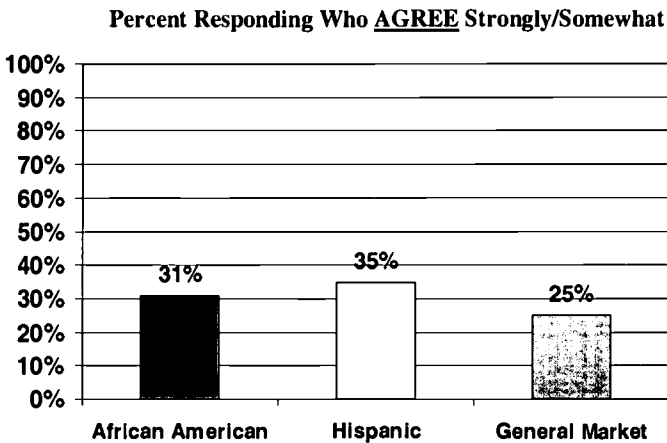
- *Online African Americans and Hispanics are more likely than the general market to believe that race and ethnicity are important factors on the Internet.* Nearly 60% of general market users agree the Internet is "colorblind" while 41% of African Americans and 44% of Hispanics agree. Similarly, over 30% of online African Americans and Hispanics disagree that the Internet is "colorblind," while in contrast, only 16% of general market users disagree. These differences demonstrate the significant divergence that exists between online general market users and online African Americans and Hispanics over the relevance of race and ethnicity on the Internet.

**“The Internet Is ‘Colorblind’”**



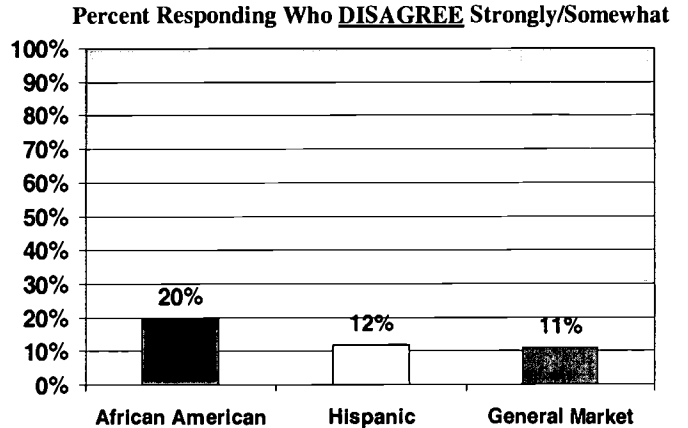
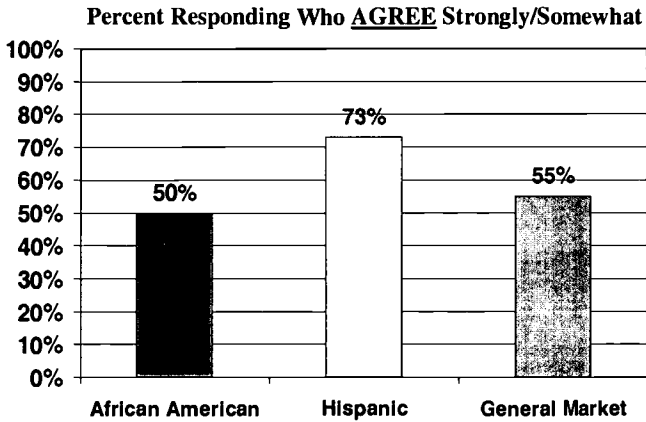
- Most Internet users of African American, Hispanic, or general market backgrounds agree that all people have equal access to the Internet. Only 31% of African Americans, 35% of Hispanics, and 25% of general market users agree that equal access is available to everyone. Similarly, 59% of African Americans and Hispanics and 65% of general market users disagree with the statement.*

**“All People Have Equal Access To The Internet”**



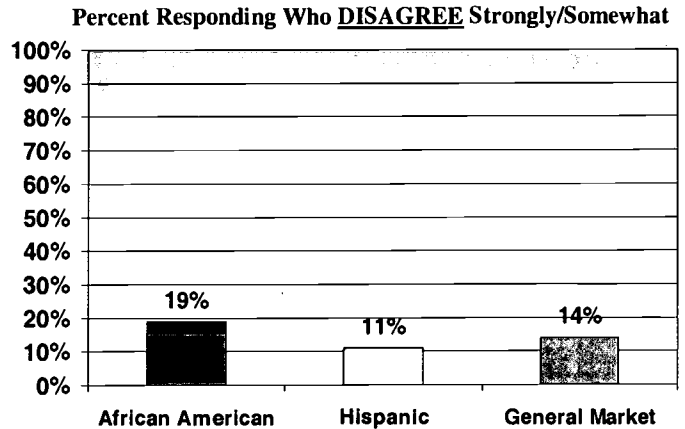
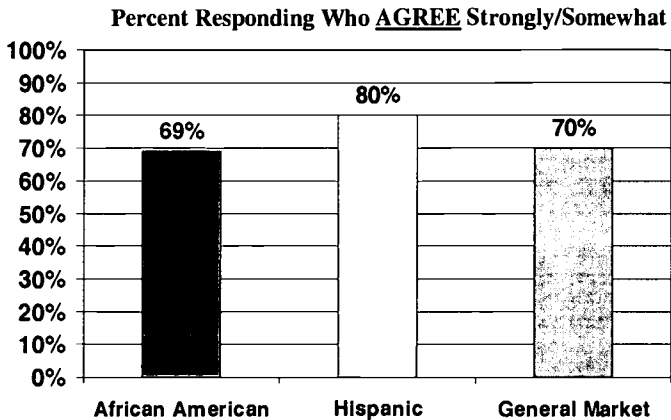
- Most online Hispanics feel that the Internet has improved society overall, while online African Americans express the greatest degree of skepticism about the Internet’s contribution to society. 73% of online Hispanics agree with the statement; while only 50% and 55% of African Americans and general market users agree. Nearly twice as many online African Americans (20%) disagree with the statement compared to online Hispanics (12%) and general market users (11%).*

***“The Internet Has Improved Our Society Overall”***



- Online Hispanics are also more likely to agree that the Internet has created greater opportunities for all people than online African Americans and general market users. 80% of online Hispanics agree with the statement, in contrast to only 69% of online African Americans and 70% of online general market users. Online African Americans express the greatest degree of skepticism over the statement (19%) than online Hispanics (11%) and general market users (14%).*

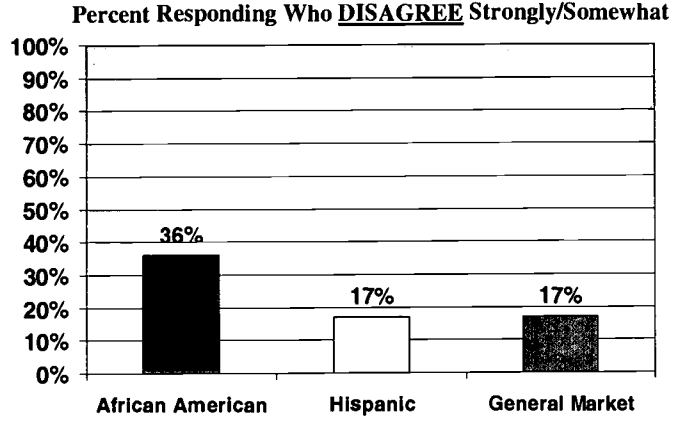
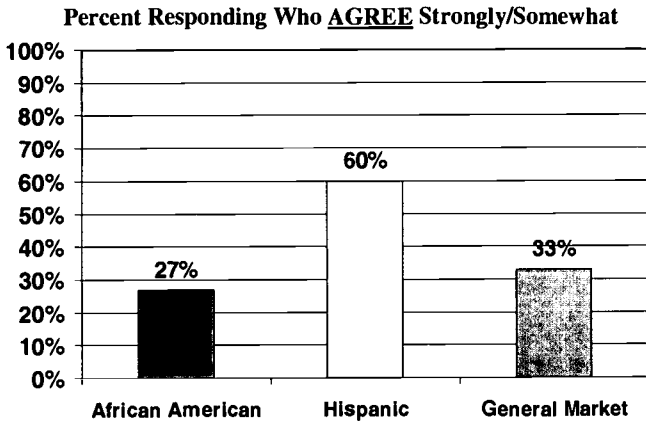
***“The Internet Has Created Opportunities For All People”***



- Online Hispanics are also far more likely to agree that the Internet breaks down racial barriers than any other group, while significantly more online African Americans disagree with this statement than online Hispanics and general market users. 60% of online Hispanics agree with the statement, in contrast to only 27% of online African*

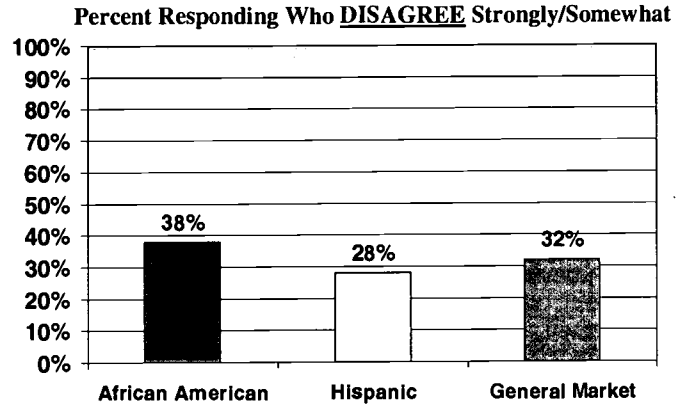
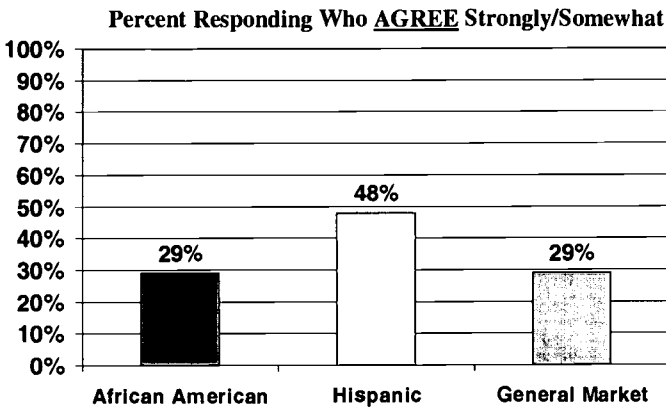
Americans and 33% of online general market users. Over twice as many online African Americans (36%) disagree with the statement as online Hispanics and general market users (both at 17%).

***“The Internet Has Helped To Break Down Racial Barriers”***



- Online Hispanics are far more likely to agree that the Internet breaks down economic barriers than any other group, while significantly more online African Americans disagree with this statement than online Hispanics and general market users. 48% of online Hispanics agree with the statement, in contrast to only 29% of online African Americans and general market users. 38% of online African Americans disagree with the statement, compared to 28% of online Hispanics and 32% of general market users.*

***“The Internet Has Helped To Break Down Economic Barriers”***

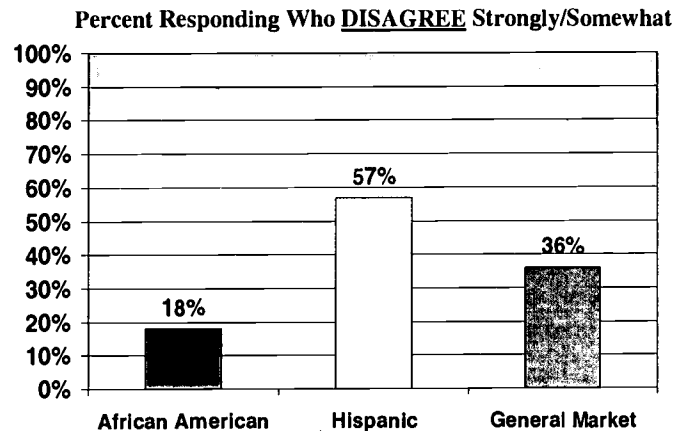
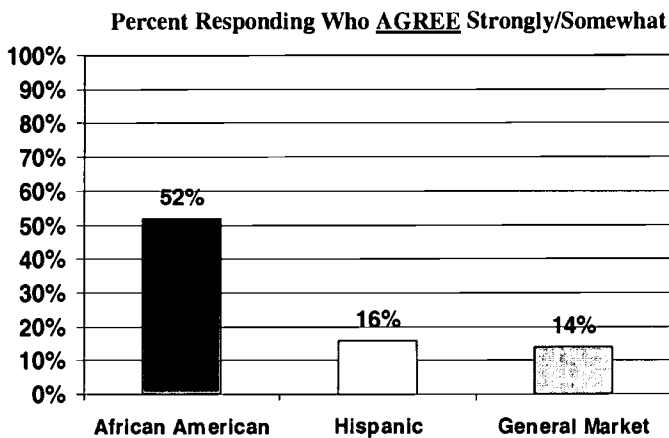


## Targeting Online Ethnic Users: African Americans and Hispanics

In the past three years, numerous sites, realizing the lack of ethnic- and culturally-specific content, have been launched to target the growing base of online African Americans and Hispanics. Their presence fulfills a unique need by connecting people to their communities and serves an integral component to the online ethnic experience. The response to these websites varies widely.

- *More than any other group, online African Americans believe that people of color have unique needs on the Internet, whereas many online Hispanics disagree with this notion.* Over one-half of online African Americans (52%) agree with the sentiment that unique needs exist for people of various ethnic backgrounds on the Internet. In stark contrast, only 16% of online Hispanics and 14% of general market users agree. Online Hispanics are more apt to disagree with this (57%) than African Americans (19%) and even general market users (11%).

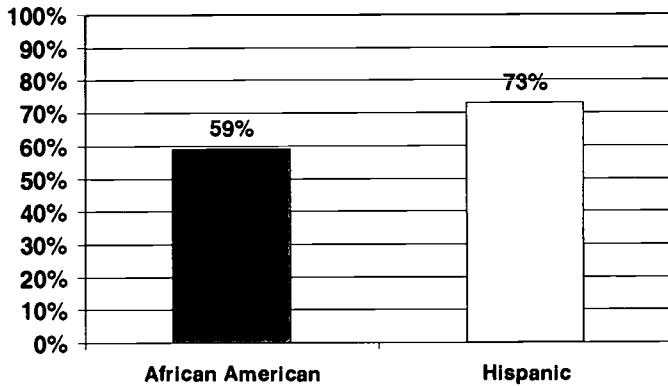
### *“People Of Color Have Unique Needs On The Internet”*



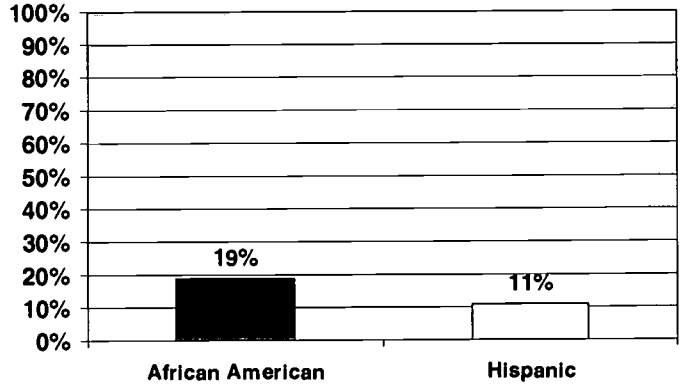
- *Most online Hispanics and African Americans agree that the Internet keeps them connected to their ethnic community.* Nearly three-quarters of Hispanics and almost 60% of African Americans indicated that the Internet allowed them to keep in touch with their own ethnic community. Only 11% of Hispanics disagreed, while a slightly higher degree (19%) of African Americans disagreed.

***“The Internet Keeps Me Connected To My Ethnic Community”***

Percent Responding Who **AGREE** Strongly/Somewhat



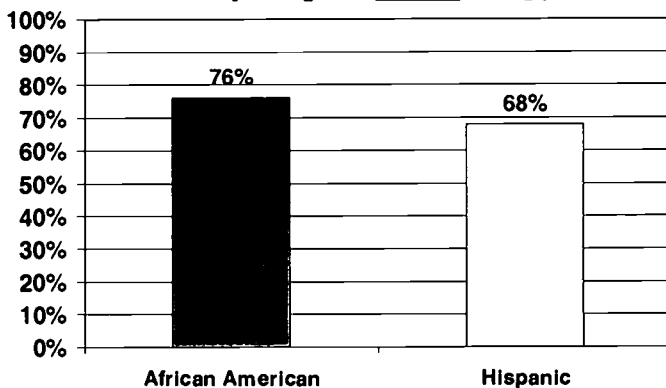
Percent Responding Who **DISAGREE** Strongly/Somewhat



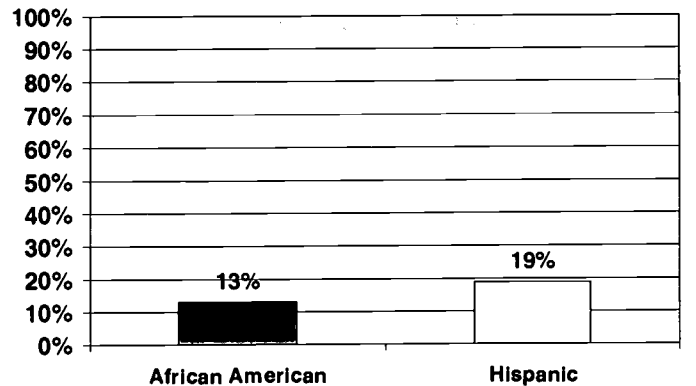
- Most online African Americans and Hispanics typically visit websites catered to their ethnic background. 76% of African Americans and 68% of Hispanics indicate that visiting these ethnic websites is an overall part of their Internet experience. Only 13% of online African Americans and 19% of Hispanics disagree with outlook.*

***“I Typically Visit (African American or Hispanic) Web Sites As Part Of My Internet Experience”***

Percent Responding Who **AGREE** Strongly/Somewhat



Percent Responding Who **DISAGREE** Strongly/Somewhat

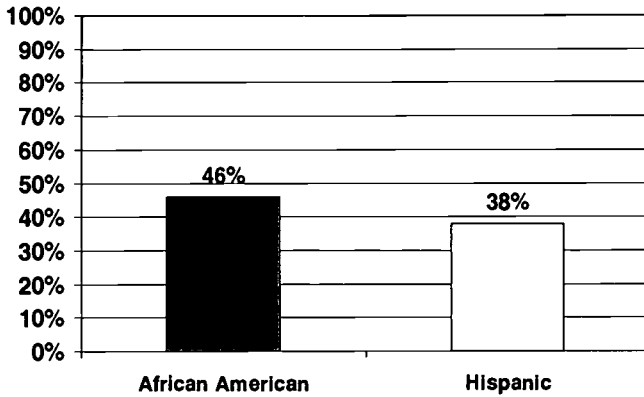


- More online African Americans prefer to visit ethnic web sites than online Hispanics. Although many online African Americans and Hispanics visit websites, slightly less than one-half of online African Americans (46%) prefer visiting these sites, while only 38% of online Hispanics prefer them. Similarly, over 40% of online Hispanics disagree with the statement, while 25% of online African Americans disagree.*

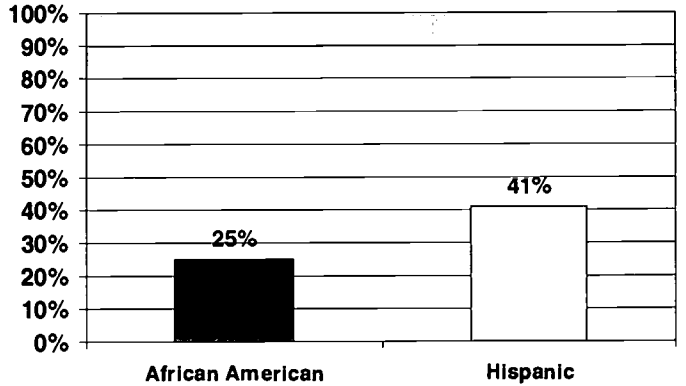


***“I Prefer To Visit (African American or Hispanic) Web Sites Over Other Web Sites”***

Percent Responding Who AGREE Strongly/Somewhat



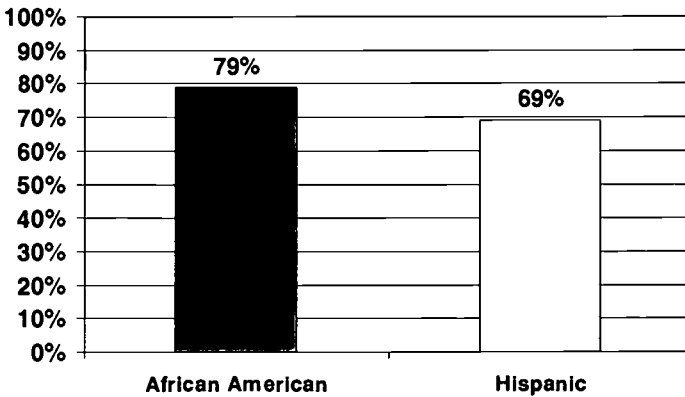
Percent Responding Who DISAGREE Strongly/Somewhat



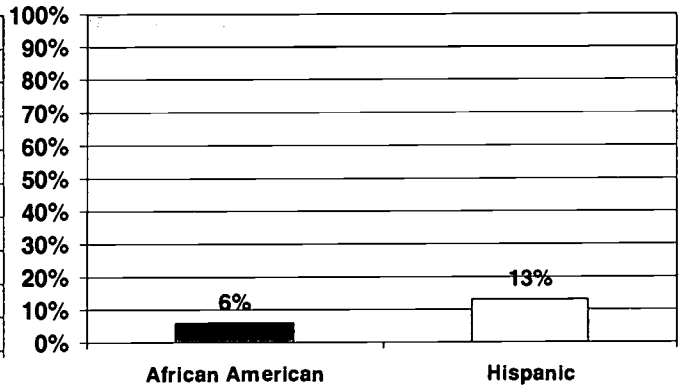
- Most online African Americans and Hispanics find the content on ethnic web sites meaningful. 79% of African Americans and 69% of online Hispanics find ethnic web content meaningful, while only a few in both groups disagree.*

***“The Content On (African American or Hispanic) Web Sites Is Meaningful To Me”***

Percent Responding Who AGREE Strongly/Somewhat

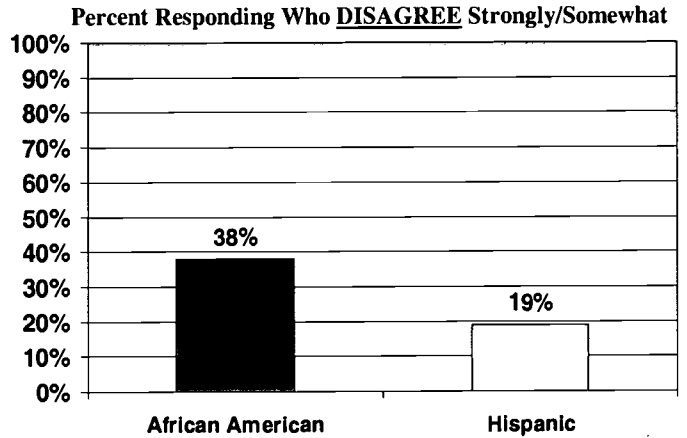
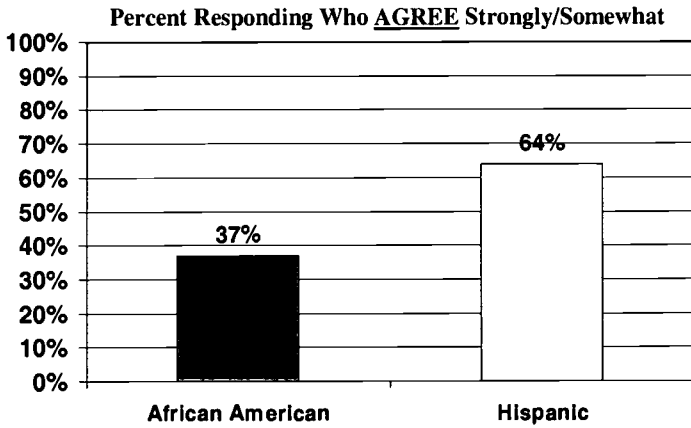


Percent Responding Who DISAGREE Strongly/Somewhat



- Many online Hispanics feel that there is adequate content for them, while far fewer African Americans agree. 64% of online Hispanics agree there is adequate content for them, while only 37% of online African Americans agree with this. Conversely, 38% of online African Americans disagree that there is adequate content, while only 19% of online Hispanics disagree.*

*There Is Adequate Internet Content  
For (African Americans or Hispanics)*



### **Summary of Respondent Internet Attitudes**

- For the most part, all groups indicate that they are generally positive about their personal experiences with the Internet and were confident in their online abilities. Respondents of all groups even express that the Internet has made their lives much easier, although they are very concerned about children's access to the medium.
- Online African Americans and Hispanics also express their tendencies to believe their ethnicity and cultural background continues to matter on the Internet.
- However, viewpoints diverge when discussing the social impacts of the Internet. As online Hispanics tend to view the Internet optimistically as a tool that creates greater socio-economic opportunities and breaks down barriers, online African Americans express a high degree of skepticism towards the Internet as an agent for social transformation.
- Most online African Americans believe people of color have unique needs on the Internet whereas many online Hispanics do not.
- Many online African Americans do not find there is adequate content on the Internet targeted to their community; unlike many online Hispanics, who report that there is adequate content for them.

### **Opportunities for Ethnic Websites**

- Many online Hispanics and African Americans believe the Internet keeps them connected to their own ethnic communities, and most respondents typically visit ethnic web sites targeted at them as a part of their Internet experience.
- Most online African Americans report they prefer visiting Black websites, but fewer online Hispanics express they prefer to Hispanic sites.
- Slightly over one-half of respondents in each community report being "satisfied" with the quality of content contained in ethnic websites, while approximately 25% of both communities report being "dissatisfied" with quality of relevant, ethnic content.
- There are major opportunities to develop content for multicultural children. Only about one-third of respondents in each group report being "satisfied with the quality of Internet content available for their children", which is exceeded by those who are dissatisfied with the content (approximately 40%).

### For Online African Americans:

---

- Online African Americans are an economically and socially sophisticated segment of the population. Internet communications strategies should speak directly to the empowerment goals of the group – which are intertwined with economic empowerment agendas: career advancement, professional development, and educational agendas.
- Marketing strategies aimed at online African Americans must address their skepticism and lack of trust in external institutions and the Internet medium itself. Security measures and guarantees can mitigate some of this skepticism, but strategies must also adopt appropriate communication measures and responsiveness to overcome suspicions and gain credibility.
- Offer more comprehensive, compelling, and culturally relevant content for both adults and children across all areas: e-commerce, entertainment, information resources, career advancement, education, and social/communications.
- Recognize that the existing presence of African Americans on the Black web sites symbolizes a commitment to and credibility with this audience. These sites are a viable platform to launch new ideas, activities, and marketing strategies aimed at online African Americans.
- Target the burgeoning number of online African American women. Since a substantial base of African American Internet users are female, there must be greater recognition of the online needs and tastes for this segment of the Internet population.<sup>10</sup>

### For Online Hispanics:

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- Communications strategies aimed at online Hispanics must be sensitive to language and acculturation issues. Be sensitive to the heterogeneity of online Hispanics. Language should not be used as a replacement for cultural relevance. Although the degree of skepticism toward the Internet is much smaller than online African Americans, the issue of online trust must be similarly addressed.
- Offer more content that addresses the central role of children and the family among Hispanic culture.

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<sup>10</sup> This finding is reinforced by the report, "African Americans and the Internet," October 22, 2000, from the Pew Internet & American Life Project. Their results demonstrate that African American women have driven the growth of the Black online population and outnumber Black males. Moreover, they are much more likely to have sought health information, job information, and religious information on the Internet.

- ♦ Develop a broader array of quality information resources, particularly in international and culturally relevant news content in order to nurture and grow the large readership base among online Hispanics.
- ♦ Recognize that the existing presence of Latino websites as a vehicle for marketing. Due to their language and cultural capacities, these sites are a viable platform to launch new ideas, activities, and marketing strategies aimed at online Hispanics.
- ♦ Recognize and build upon the favorable perceptions and optimism of online Hispanics towards the Internet by improving and expanding the range of opportunities and choices available to them.

## CONCLUSION

A major assumption behind this study is that digital access and ethnic culture combine in unique ways to determine culturally specific, online behaviors and attitudes. From these results, it is apparent that this interplay between culture and technology shapes the behavior and attitudes of ethnic Internet users in a variety of ways – how different ethnic groups attain access, the type of online activities they engage in, and their degree of trust/comfort in the inner-workings behind a computer screen in order to provide personal information. The divergent responses and answers to our survey demonstrate that a number of differences do in fact exist among the online ethnic groups studied, in this case among African Americans, Hispanics, and the general market (predominantly Anglo).

Of course, the explanations behind these differences aren't always as simple or as conclusive as they appear. The myriad of experiences an Internet user undergoes can play a large role in shaping attitudes and practices. However, what clearly emerges from this study is that online African Americans, Hispanics, and general market populations think and behave very differently from each other and in ways that are consistent with the patterns of others with their ethnic and cultural backgrounds. Understanding both these similarities and differences are integral to marketing to this emerging Internet contingent.

Despite the insightful and, in some cases, expected findings arising from our study, which both challenge and reinforce existing notions of ethnic Internet usage, the dynamic, constantly in-flux nature of the Internet compels us to resist issuing grand pronouncements with absolute finality. The only definitiveness we can derive with confidence is that the attitudes and behaviors captured in our research are still shifting and evolving.

Since the Internet, and the entire digital world in fact, is a relatively new arena for many ethnic participants, time will tell before we see how they respond to the technology with more consistent patterns. When that time comes, a new breed of ethnic Internet users will not only bridge the digital divide, they will change the entire digital complexion of the wired world, as they have already begun doing.

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