2012

The Internet in Cyprus

Final Report

World Internet Project

Cyprus University of Technology (CUT)

Department of Communication and Internet Studies

CYPRUS UNIVERSITY OF TECHNOLOGY
DEPARTMENT OF COMMUNICATION AND INTERNET STUDIES

THE INTERNET IN CYPRUS 2012

FINAL REPORT

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CREDITS

WIP Representative in Cyprus
Professor Nicolas Demertzis
University of Athens

Core Research Team
Dr Dimitra L. Milioni
Dr Stelios Stylianou
Cyprus University of Technology, Principal Investigators
Professor Nicolas Demertzis
University of Athens

Contributing Authors
Dr Stelios Stylianou
Dr Dimitra L. Milioni
Konstantinos Vadratsikas
Cyprus University of Technology

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DETAILED CREDITS

2008 Wave

Representative of WIP in Cyprus and Principal Investigator
Professor Nicolas Demertzis
University of Athens

Project Director
Dr Dimitra Milioni, Lecturer
Cyprus University of Technology

Research Team and Contributing Authors
Dr Vassilis Gialamas, Associate Professor
University of Athens
Dr Christopher Kyriakides, Assistant Professor
Dr Eleni A. Kyza, Lecturer
Dr Lambros Lambrinos, Lecturer
Dr Dionysis Panos, Lecturer
Dr Nicolas Tsapatsoulis, Assistant Professor
Cyprus University of Technology

Research Consultants
Dr Angeliki Gazi
University of Athens
Dr Michalis Vryonides
Symmetron MRCI Ltd

2010 Wave

Principal Investigator and WIP Representative in Cyprus
Professor Nicolas Demertzis
University of Athens

Project Director
Dr Dimitra L. Milioni, Lecturer
Cyprus University of Technology

Research Team and Contributing Authors
Dr Vaia Doudaki, Lecturer
Cyprus University of Technology
Dr Vassilis Gialamas, Associate Professor
University of Athens
Dr Christopher Kyriakides, Assistant Professor
Dr Eleni A. Kyza, Lecturer
Dr Lambros Lambrinos, Lecturer
Dr Dimitra L. Milioni, Lecturer
Dr Dionysis Panos, Lecturer
Dr Korinna Patelis, Assistant Professor
Dr Stelios Stylianou, Associate Professor
Dr Nicolas Tsapatsoulis, Assistant Professor
Cyprus University of Technology

Research Consultants
Dr Angeliki Gazi
University of Athens
Dr Michalis Vryonides
Symmetron MRCI Ltd

2012 Wave

WIP Representative in Cyprus
Professor Nicolas Demertzis
University of Athens

Core Research Team
Dr Dimitra L. Milioni, Assistant Professor
Dr Stelios Stylianou, Associate Professor
Cyprus University of Technology, Principal Investigators
Professor Nicolas Demertzis
University of Athens

Research Associates
Dr Bulent Kanol
Dr Bilinc Dolmaci
Muharrem Amcazade
Eliz Tefik
The Management Center
Konstantinos Vadratsikas
Cyprus University of Technology

Research Assistants
Yiota Constanti
Antonia Gregoriou
Konstantinos Kivyttis
Venetia Papa
Zenon Theodosiou
Yiannis Xenophontos
Cyprus University of Technology

Contributing Authors
Dr Stelios Stylianou, Associate Professor
Dr Dimitra L. Milioni, Assistant Professor
Konstantinos Vadratsikas, Research Fellow
Cyprus University of Technology

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EXECUTIVE SUMMARY

The third wave of the World Internet Project survey in Cyprus was conducted in the fall of 2012 in both the Greek-Cypriot and the Turkish-Cypriot communities. The data were collected by two telephone surveys, one in the Greek-Cypriot community with a probability sample of 1000 persons aged 15 or over and one in the Turkish-Cypriot community with a probability sample of 1007 persons aged 15 or over. In the first part of the report, we present trends in internet use in the Greek-Cypriot community from 2008 to 2012. In the second part, we present a comparison between the Greek-Cypriot and the Turkish-Cypriot communities in 2012.

Internet penetration in the Greek-Cypriot community has been rising steadily from 49.7% in 2008 to 57.8% in 2010 to 61.6% in 2012. In 2012, almost all Greek-Cypriot users (95.9%) accessed the internet at home (the overwhelming majority via broadband connection) while 70% of those employed and 68.8% of those at school accessed the internet from work and school respectively.

With respect to the digital divide, in 2012, male users still prevailed by 12 percentage points, although internet use among women continues to increase. Internet use is negatively correlated with age and positively correlated with educational attainment and income.

The internet has been gaining importance in the Greek-Cypriot community both as a source of information and as a source of entertainment. Still, the importance of television, radio and print newspapers has not diminished. Greek-Cypriots who do not use the internet spend more time watching television than internet users, while there are no apparent differences between users and non-users with respect to reading newspapers and listening to the radio.

The use of the internet seems to be contributing positively in Greek-Cypriots' social life, as it is associated with slight to moderate increases in the contacts of users with people of similar interests, political ideologies and religious beliefs, as well as with people in the same profession and with family members and friends. With respect to communication with other people, email remains the most popular form of communication and its importance seems to be growing. Increases are also observed in instant messaging, chat room participation, sending email attachments, making phone calls over the internet and updating one's status in social media; at the same time, working on blogs, posting photos or pictures, uploading music videos, participating in discussion boards and commenting on blogs and message boards have remained relatively stable since 2008 in terms of frequency of involvement.

Beyond the social use of the internet, several other activities, such as looking for news, jobs and humorous content, looking for travel, heath and product information and reading blogs, seem to be gaining popularity among Greek-Cypriot users. An increase is also observed in buying things and paying bills online, electronic banking and making travel reservations. Still, Greek-Cypriots are becoming increasingly more concerned about the security of online transactions.

With respect to internet use for entertainment, web browsing is by far the most popular activity among Greek-Cypriots, while visiting religious websites and gambling are the least popular. Downloading music and videos, listening to online radio stations and visiting social networking and video-sharing websites are also on the rise.

Greek-Cypriot users increasingly perceive the internet as a safe means of political talk as well as an effective means of gaining political awareness and power. Most respondents also support freedom of expression on the internet, although about four in ten support more governmental regulation of the internet. Finally, Greek-Cypriot internet users seem to be becoming more and more worried with respect to online privacy.

Turning to the comparison of the two communities, we observe that, in both communities, around 60% of the respondents used the internet during 2012, with a slightly higher percentage observed on the Greek-Cypriot side (61.6% vs 58.2%). In both communities, the majority of internet users access the internet from home. A majority of Turkish-Cypriot users (56.0%) and an overwhelming majority of Greek-Cypriot users (89.7%) connect from home via broadband connection. Connecting to the internet via a phone modem is unusual in the Greek-Cypriot community; in the Turkish-Cypriot community it occurs at a rate of 32.0%. Internet access at school is more prevalent in the Greek-Cypriot community. A higher percentage of Turkish-Cypriots access the internet from mobile devices. Overall Greek-Cypriots spend more time on the internet than Turkish-Cypriots.

With respect to the digital divide, there is a slightly larger gap in the prevalence of internet use between males and females in the Turkish-Cypriot community (64.5% among males vs 50.8% among females, compared to 67.5% vs 55.7% respectively in the Greek-Cypriot community). Internet use correlates negatively with age and positively with educational attainment and income in both communities. Rates of use are similar in urban and rural areas on the Greek-Cypriot side, while Turkish-Cypriot urbanites seem to be using the internet at a higher rate compared to Turkish-Cypriot rural residents.

The internet is perceived in both communities as an important source of both information and entertainment. Greek-Cypriots tend to be slightly less trustful of the reliability of online information. Most internet users in both communities report that television is an important or very important source of information and entertainment. Turkish-Cypriot internet users value newspapers as sources of information more than Greek-Cypriot users do. Most Turkish-Cypriot (61.0%) and Greek-Cypriot internet users (54.5%) believe that radio is an important or very important source of information, while 60.4% of the Greek-Cypriot respondents and 53.3% of the Turkish-Cypriot respondents consider radio as an important or very important source of entertainment. In both communities, internet non-users spend more time watching television than internet users, while internet users spend more time listening to the radio than non-users. Newspaper reading seems to be unrelated to internet use.

In both communities, the use of the internet seems to be contributing positively to users' social life, as it is associated with slight to moderate increases in the contacts of users with people of similar interests, political ideologies and religious beliefs, as well as with people in the same profession and with family members and friends. Turkish-Cypriot users report these increases at a higher degree compared to Greek-Cypriot users, with the exception of contact with people in one's profession, where the perceived increase in contact is higher in the Greek-Cypriot sample. In both communities, non-users spend more time with their families than users. Greek Cypriot users report spending more time with their friends than non-users, while internet use in the Turkish-Cypriot community does not seem to be related to the amount of time Turkish-Cypriots spend with their friends. Greek-Cypriots use email and email attachments more often that Turkish-Cypriots, who seem to be significantly more active in blogging, posting

pictures and videos online and participating in discussion boards. Turkish-Cypriots also use instant messaging and update their status in social media more often than Greek-Cypriots, while no important differences between the two communities are observed regarding participation in chat rooms and internet phone calls.

Greek-Cypriots use the internet on a daily basis in order to gather news information and to look for employment at a higher rate compared to Turkish-Cypriots. Greek-Cypriots also visit websites with humorous content, use the internet for health information, look for consumer information, buy things online, do online transactions, use online banking services and make online travel reservations more often. No apparent differences were noted between the two communities regarding the search for travel information and online investment. Greek-Cypriots are also more skeptical about the safety of their online transactions.

With respect to entertainment, Turkish-Cypriots use the internet for playing games more often than do Greek-Cypriots, who use it more frequently for downloading music and videos. Browsing is by far the most popular activity in both communities, whereas visiting religious websites, betting and looking for sexual content reported relatively infrequently. Social networking activities and listening to online stations are more popular among the Greek-Cypriots.

The two communities are about equally involved in using the internet to retrieve school-related information. Greek-Cypriots tend to use the internet more than Turkish-Cypriots to look up word definitions and for fact checking. The involvement of both communities in distance learning activities is minimal.

Skepticism about the possibility of gaining political efficacy through the internet is higher among Turkish-Cypriots, as 45.1% (vs 35.6% of Greek-Cypriots) do not believe that the internet can increase their influence on politics and 31.8% (21.8% of Greek-Cypriots) are uncertain on this issue. Most users in both communities remain skeptical as to whether the use of the internet can increase one's personal impact on governmental decisions and actions. The majority in both communities also remains skeptical as to whether the internet can increase public officials' interest in what people think. Yet, Greek-Cypriot respondents evaluate the internet's potential contribution to the understanding of political processes more positively than Turkish-Cypriots do. The majority of Greek-Cypriots (77.2%) and about half of Turkish-Cypriots (49.9%) are in favor of the freedom to criticize the government online. A higher percentage of Greek-Cypriots (59.4%) than of Turkish-Cypriots (35.4%) is in favor of freedom to express even extreme ideas online. Still, more than four in ten Greek-Cypriot respondents (42.9%) support that the government should regulate the internet more, while only 37.1% of Turkish-Cypriots does so. At the same time however, 37.6% of Greek-Cypriots disagree or strongly disagree with more regulation. Finally, Greek-Cypriot internet users are less likely than Turkish-Cypriot users to worry about having their online activity monitored by the state or the private sector.

INTRODUCTION

The Project

The "World Internet Project Cyprus", implemented by the Department of Communication and Internet Studies and funded by the Cyprus University of Technology, is part of the "World Internet Project" ongoing research program, directed by the Annenberg School Center for the Digital Future at the University of Southern California, with more than 20 participating countries. The first wave of the survey in Cyprus was conducted in late 2008 and the second in the spring of 2010. This report presents the results of the third wave of the survey, conducted in the fall of 2012 in both Greek-Cypriot and Turkish-Cypriot communities. Part 1 of the report presents the trends in the Greek-Cypriot community from 2008-2012. Results from the first two waves of the survey are presented together with the 2012 results. Part 2 presents a comparison between the Greek-Cypriot and the Turkish-Cypriot communities in 2012.

Methodology

Data for the third wave of the WIP Cyprus survey were collected in the fall of 2012 by two telephone surveys, one in the Greek-Cypriot community with a probability sample of 1000 persons aged 15 or over and one in the Turkish-Cypriot community with a probability sample of 1007 persons aged 15 or over. The population of interest was defined as all people 15 years of age and above who live in Cyprus and can communicate in Greek, Turkish, or English. Telephone interviews were conducted with individual participants selected randomly within households that were selected by a stratified random design from the telephone directory in each community (landline numbers only). The sampling was proportionately stratified with respect to district and area type (urban vs rural). The instrument used in both surveys was a standardized questionnaire, which included all items required by the WIP International project and a small number of additional items representing variables of theoretical interest. The questionnaire was translated in Greek and Turkish but was also available in English. The data were entered manually (Greek-Cypriot community) and by use of a Computer Assisted Telephone Interview interface (Turkish-Cypriot community). Quality control revealed no significant errors in data construction. The final datasets were weighted based on gender, age and education.

Presentation of the Results

This report contains descriptive presentation of all variables measured in the 2012 survey with simultaneous presentation of results from the previous waves in the Greek-Cypriot community (Part 1) and in comparative presentation between the Greek-Cypriot and the Turkish-Cypriot communities in 2012 (Part 2). The presentation is done using mostly bar charts of relative frequencies and, in a few occasions, variable means. The relative frequencies of all categories (answer options) are presented on the bars, in

order for the reader to know the percentages exactly, without the need to look at data tables. Brief comments are included, mostly to direct the reader smoothly through the report rather than to discuss the etiology of what is reported. It should be noted that for simplicity purposes all text is written in plain language and all figures represent center point estimates, based on the sample statistics. Confidence intervals are not reported.

PART 1.

INTERNET USE IN THE GREEK-CYPRIOT COMMUNITY (2008-2012)

1.1. INTERNET ACCESS AND USE

1.1.1. Internet Penetration

As presented in Figure 1.1.1.1, internet use among the general population of Greek-Cypriots has increased by 3.8 percentage points since 2010 and by 11.9 percentage points since 2008.

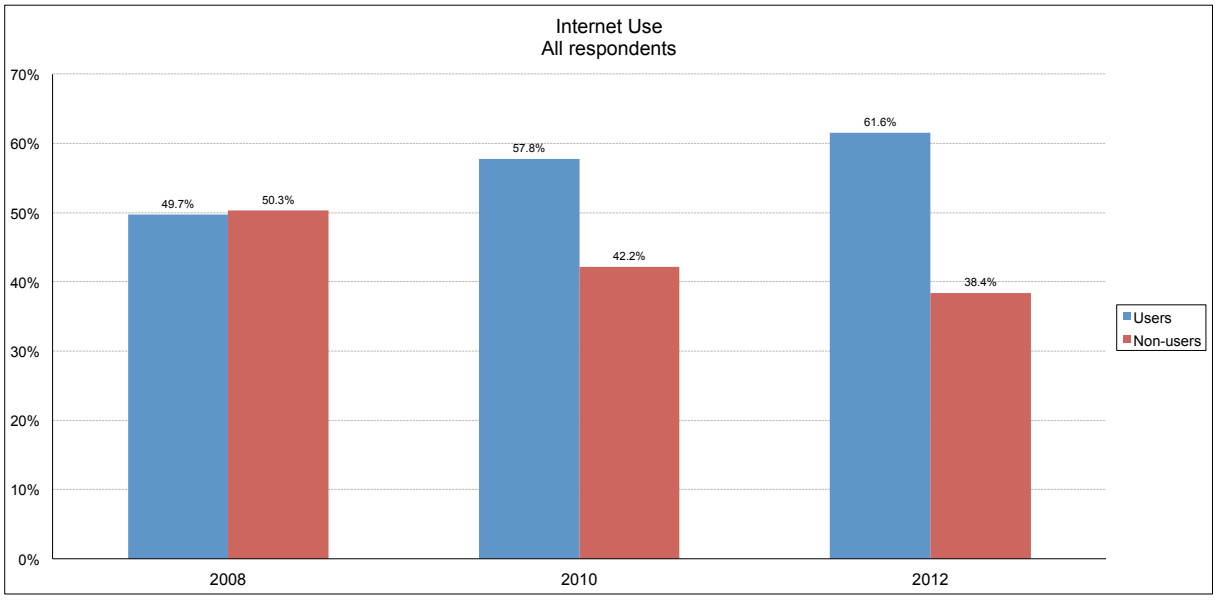

Figure 1.1.1.1. *Internet use*

Internet use seems to be increasing in most districts of the Greek-Cypriot community, with the most significant increase found in the district of Ammohostos (Figure 1.1.1.2).

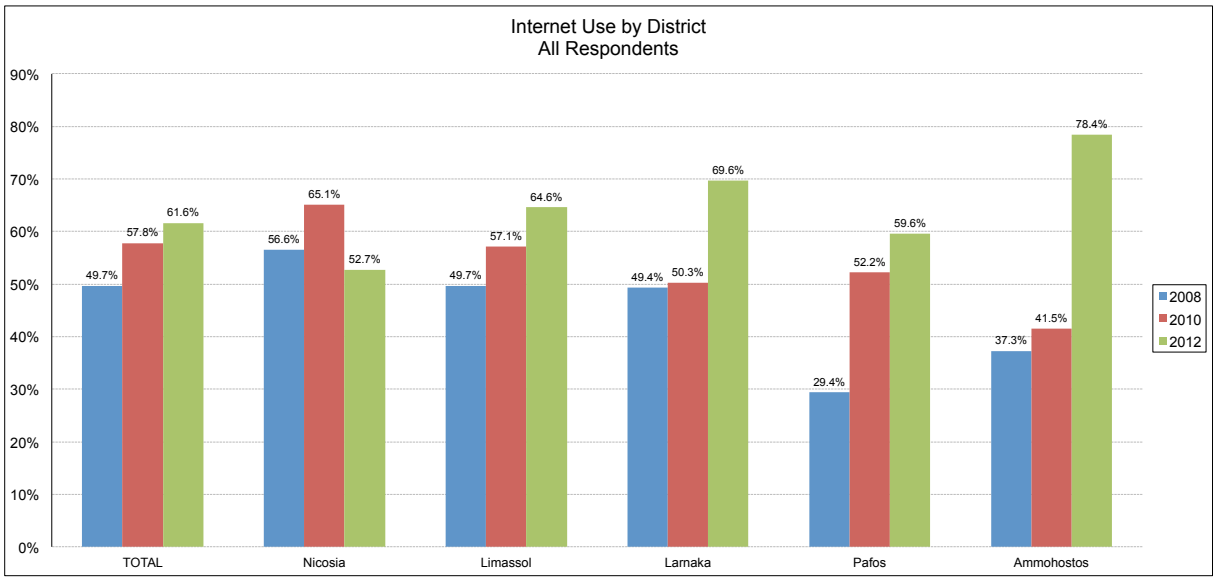

Figure 1.1.1.2. *Internet use by district*

1.1.2. Internet Use by Access Location

Figure 1.1.2.1 illustrates the various locations from which Greek-Cypriot users access the internet. The majority of internet users access the internet from home. There are important increases over time in internet use from school and other locations, while the percentage of people who access the internet from hand-held devices, such as cell-phones and tablets, has almost doubled since 2010.

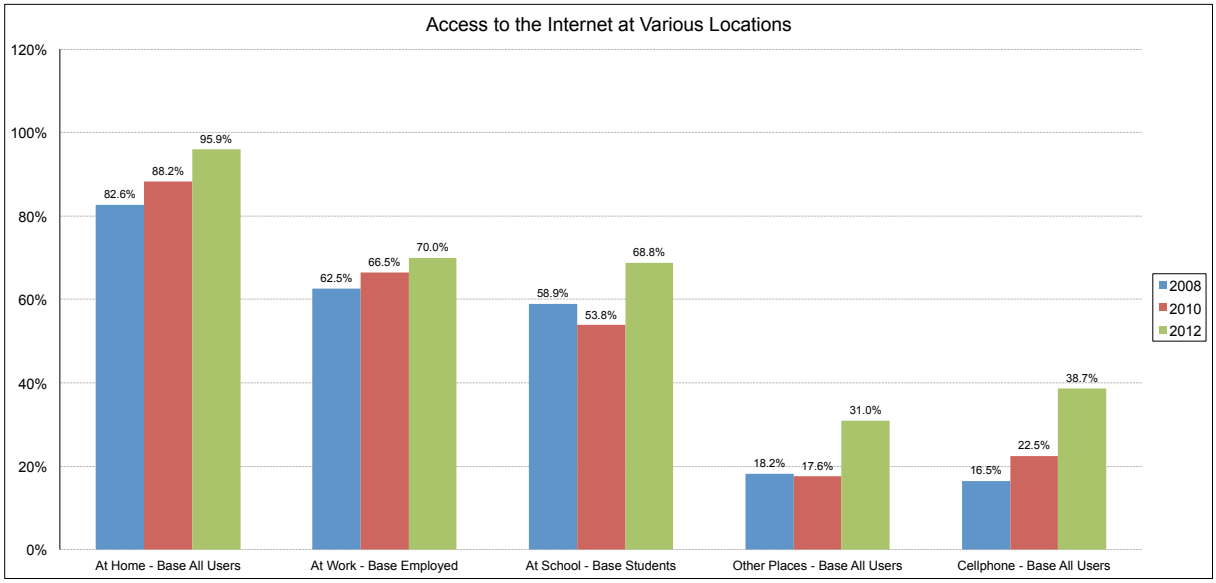

Figure 1.1.2.1. *Internet access from various locations*

On average, Greek-Cypriots users use the internet 18.2 hours per week at home, 13.1 hours per week at work and 7.9 hours per week at school, while the average cellphone internet use is 11.7 hours per week (Figure 1.1.2.2).

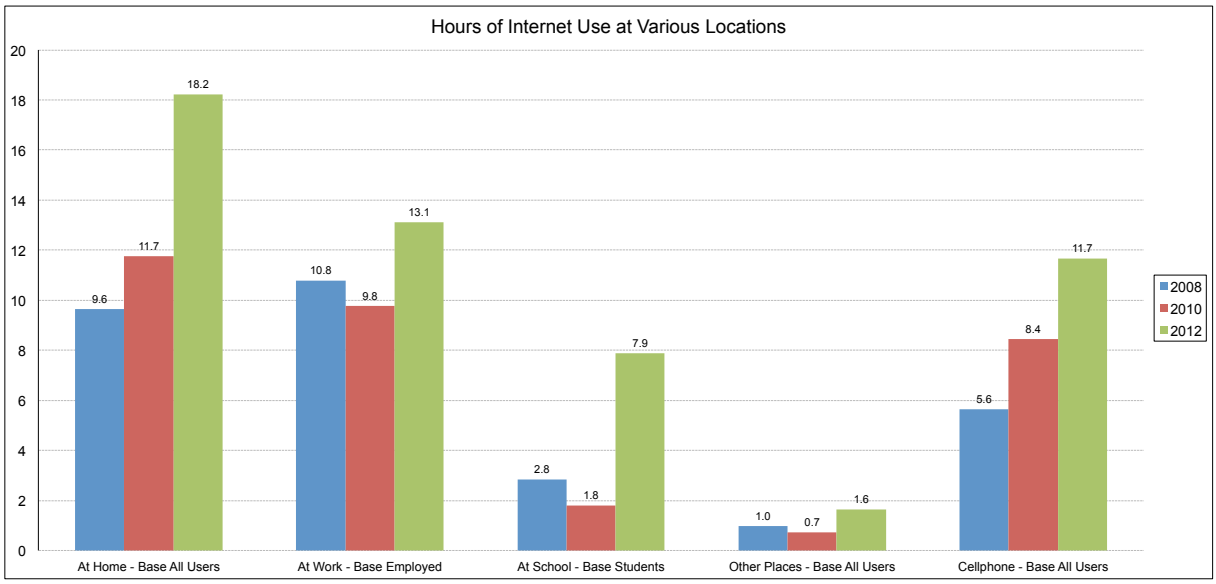

Figure 1.1.2.2. *Hours of internet use per week from various locations*

1.1.3. Type of Internet Connection at Home

The type of connection Greek-Cypriots use to access the internet at home has not changed, compared to the previous measurements, as broadband internet was and is widespread (Figure 1.1.3.1).

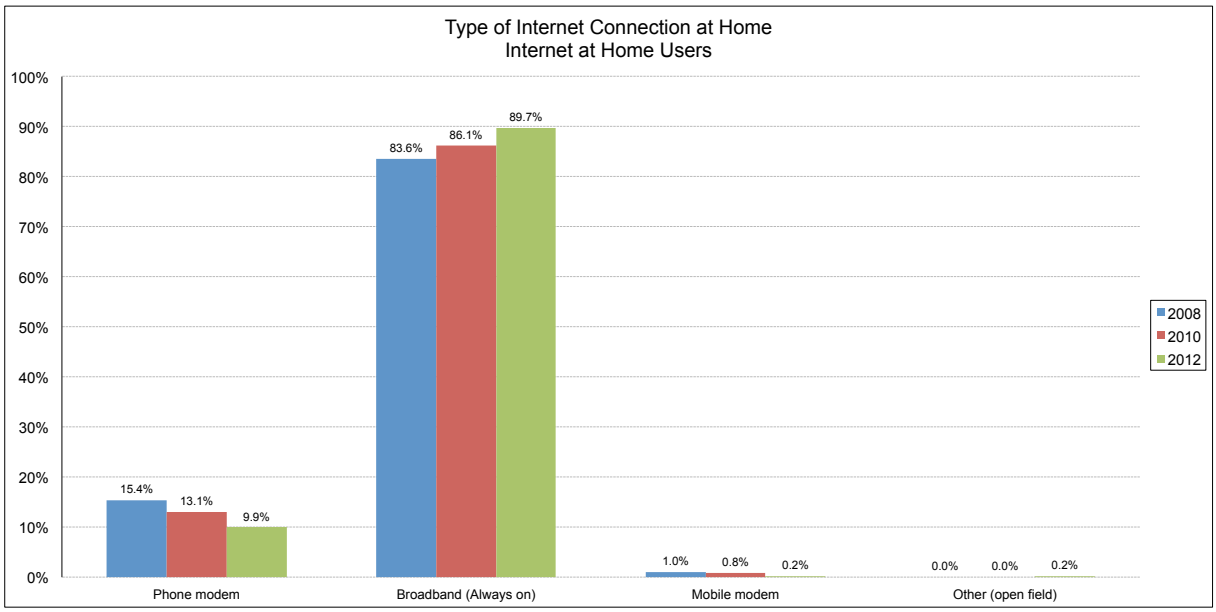

Figure 1.1.3.1. *Type of connection at home*

1.1.4. Digital Divide

The existence of a digital divide is apparent in terms of gender, age, education, employment status and income. Compared to the previous measurements, there is no significant convergence of the two ends of this divide. With respect to gender (Figure 1.1.4.1), internet use among women continues to increase, although male users still prevail by 12 percentage points.

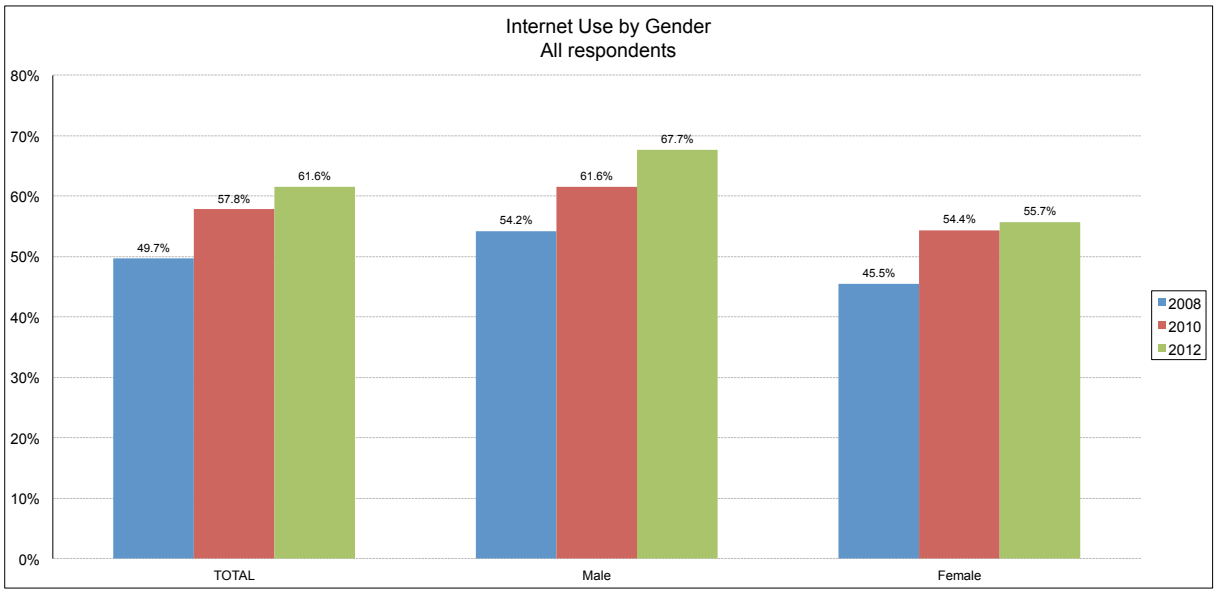

Figure 1.1.4.1. *Internet use by gender*

Figure 1.1.4.2 shows that, although internet use is increasing through time among all age groups, it is negatively associated with age at any given time.

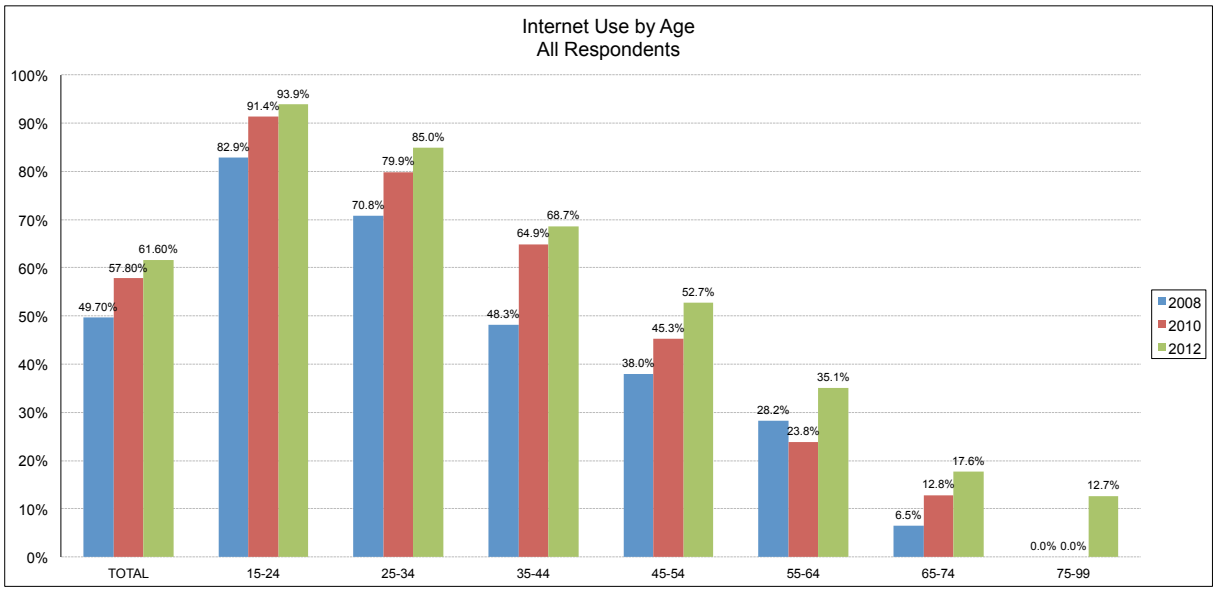

Figure 1.1.4.2. *Internet use by age*

Educational level is the third major dimension on which the digital divide in the Greek-Cypriot community is apparent (Figure 1.1.4.3). Respondents with a higher level of education are much more likely to use the internet.

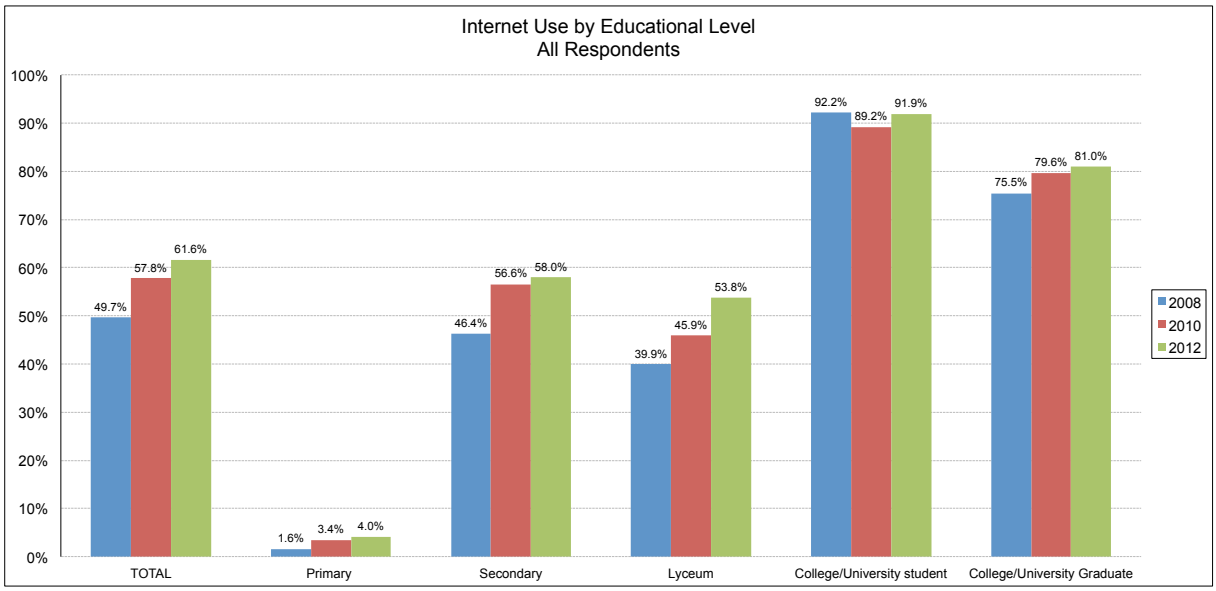

Figure 1.1.4.3. *Internet Use by educational level*

Figure 1.1.4.4 shows that internet use is higher among students (high-school, college or university) at a rate close to one hundred percent (98.3%), while it is still quite low among housewives/househusbands (22.6%) and pensioners (19.1%). Internet use is higher among the employed (68.5%) compared to the unemployed (60.0%).

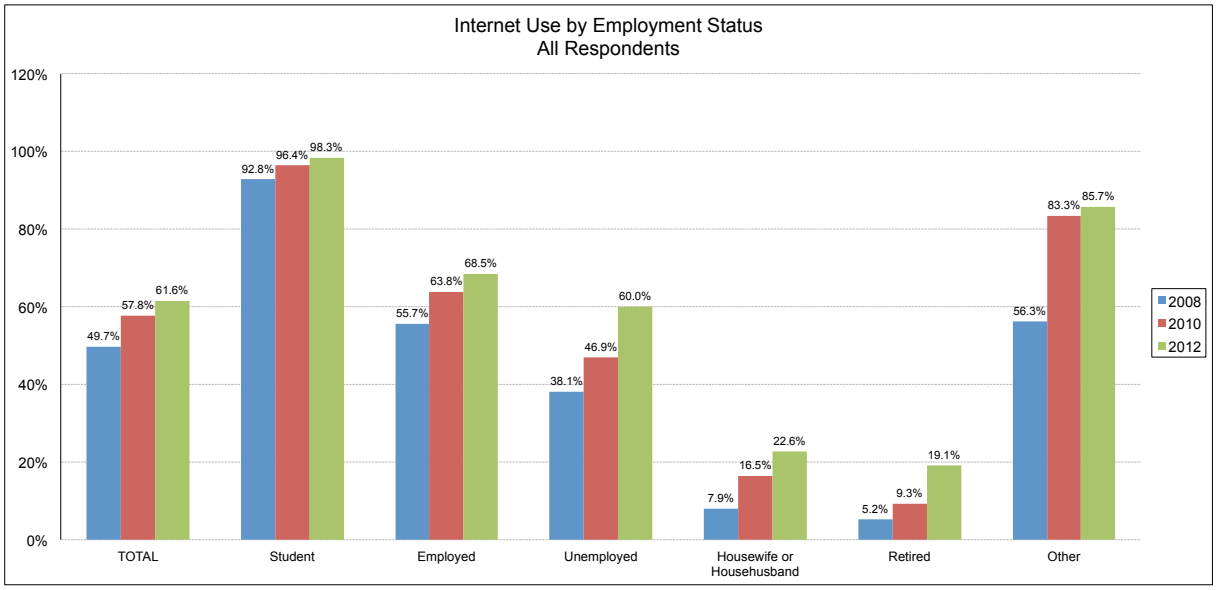

Figure 1.1.4.4. *Internet use by employment status*

Income is clearly positively associated with internet use (Figure 1.1.4.5).

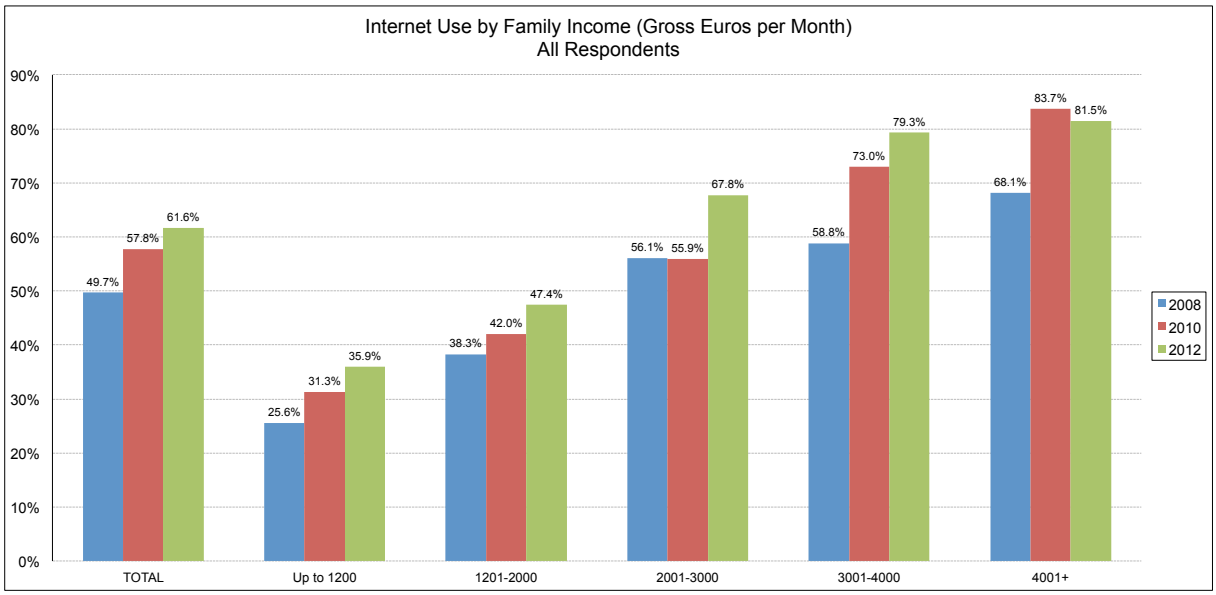

Figure 1.1.4.5. *Internet use by income*

As indicated by Figure 1.1.4.6, internet use is about equal in urban and rural areas, due to a higher rate of increase in the latter since 2008.

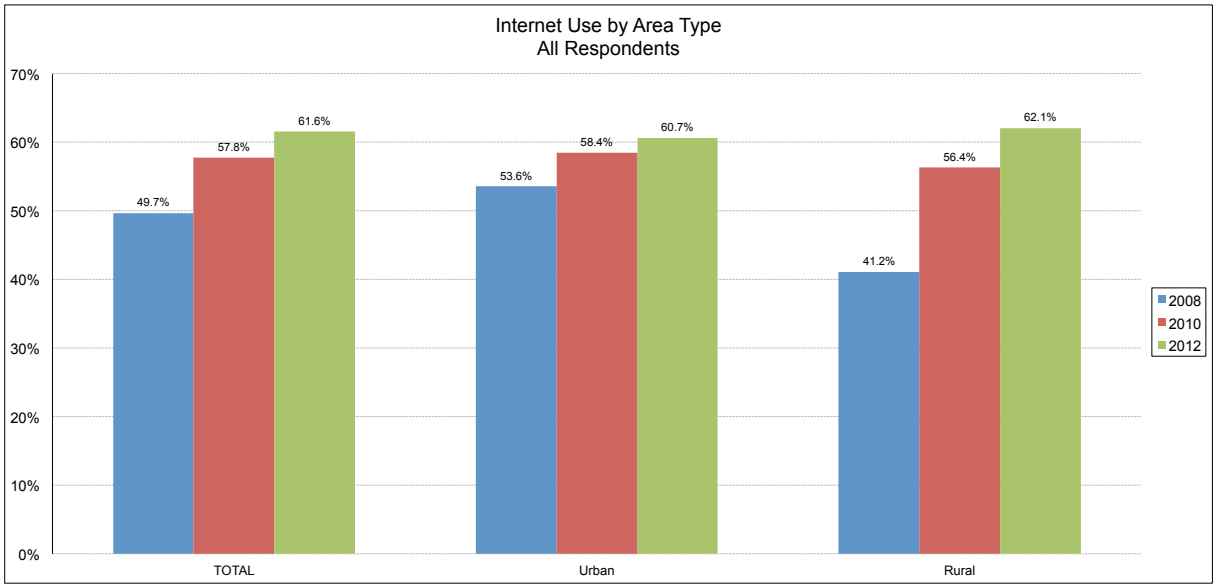

Figure 1.1.4.6. *Figure Internet use by area type*

A "reverse divide" is observed with respect to citizenship. As in 2008 and 2010, internet use appears to be higher among non-Cypriot nationals in 2012. As shown in Figure 1.1.4.7, the difference between the two groups is also increasing, indicating that the internet is becoming more important for the foreigners or immigrants who live in Cyprus, as compared to Greek-Cypriots.

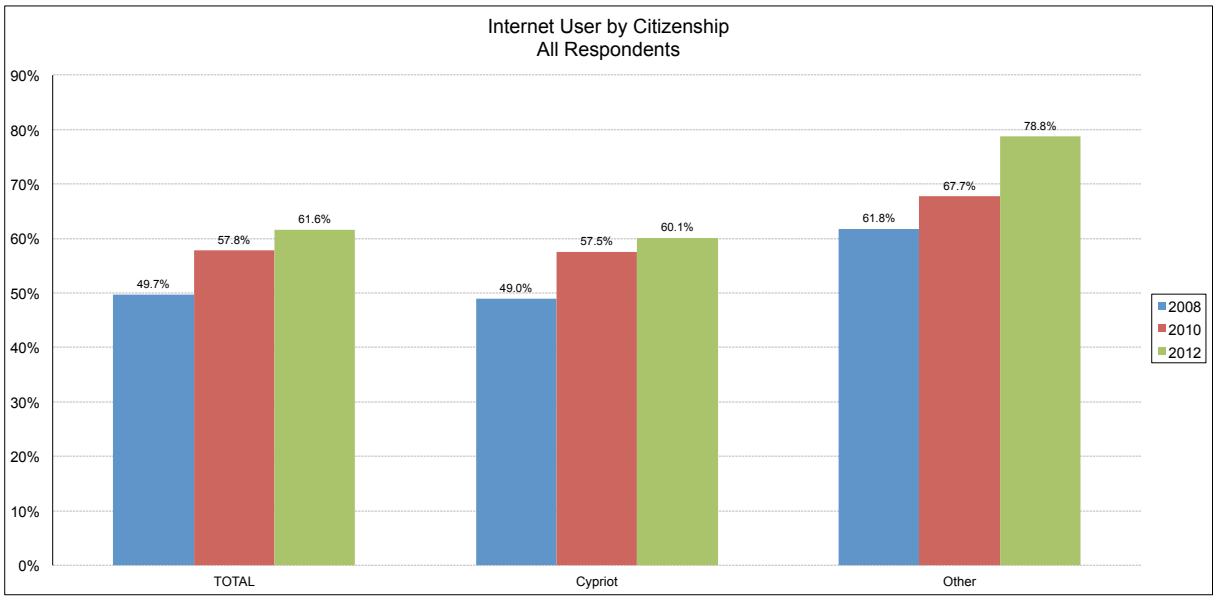

Figure 1.1.4.7. *Internet use by citizenship*

Finally, although not a factor typically accounted for as a form of digital divide, family composition seems to affect internet use, with a positive effect of the presence in the household of children under the age of 18 (Figure 1.1.4.8).

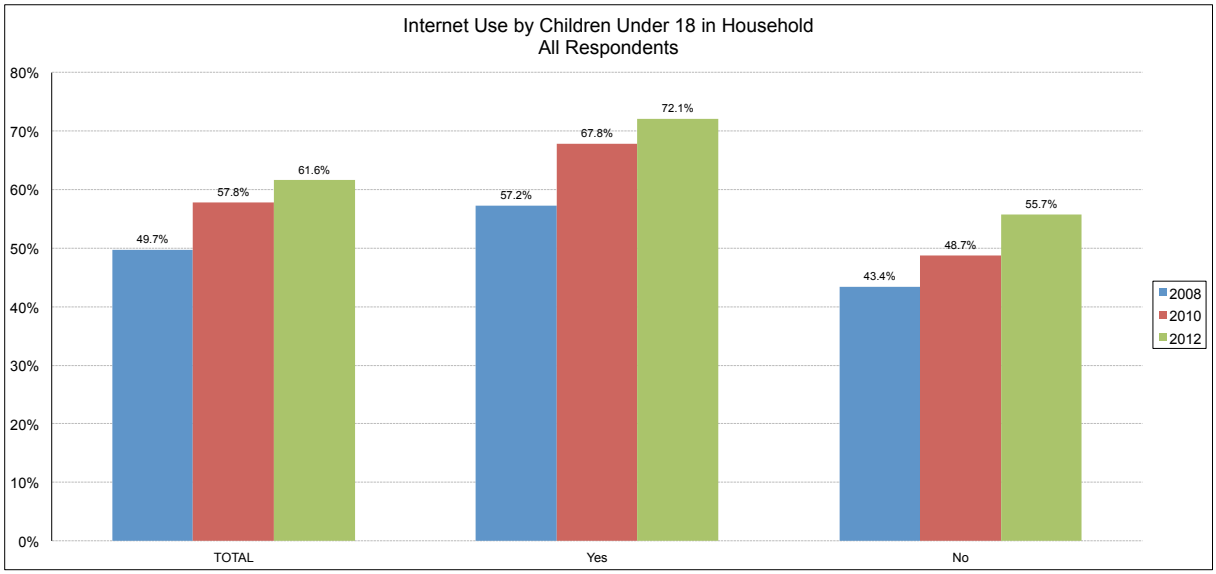

Figure 1.1.4.8. *Internet use by children in the household*

1.1.5. Internet Non-Use

Although internet use has increased dramatically in Cyprus since 2008, the percentage of people who started using the internet and quit increased from 5.9% of the total population in 2010 to 10.5% in 2012 (Figure 1.1.1.5).

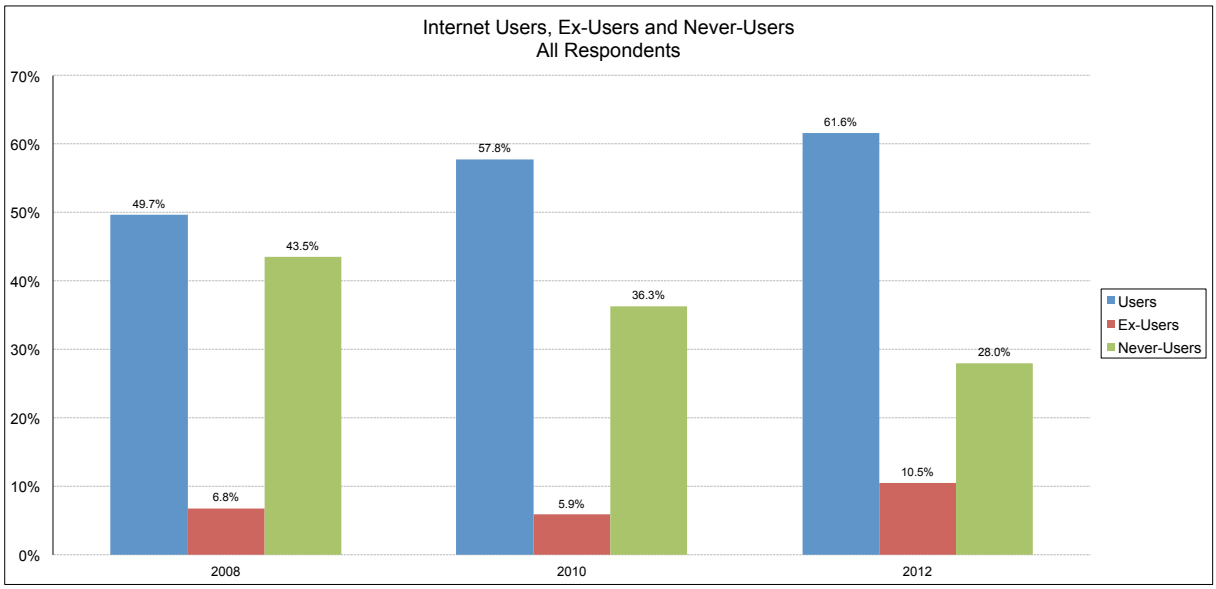

Figure 1.1.5.1. *Internet Users, Ex-Users and Never-Users*

Regarding reasons for quitting, as shown in Figure 1.1.5.2, non-usefulness and lack of knowledge and time are currently the main ones. The significant drop in the percentage of people who find the internet not interesting or not useful (from 62.8% in 2010 to 25.8% in 2012) indicates a positive attitude toward new information and communication technologies. Interestingly however, the percentage of people who cite lack of internet skills has dramatically increased (from 18.0% in 2010 to 46.1% in 2012).

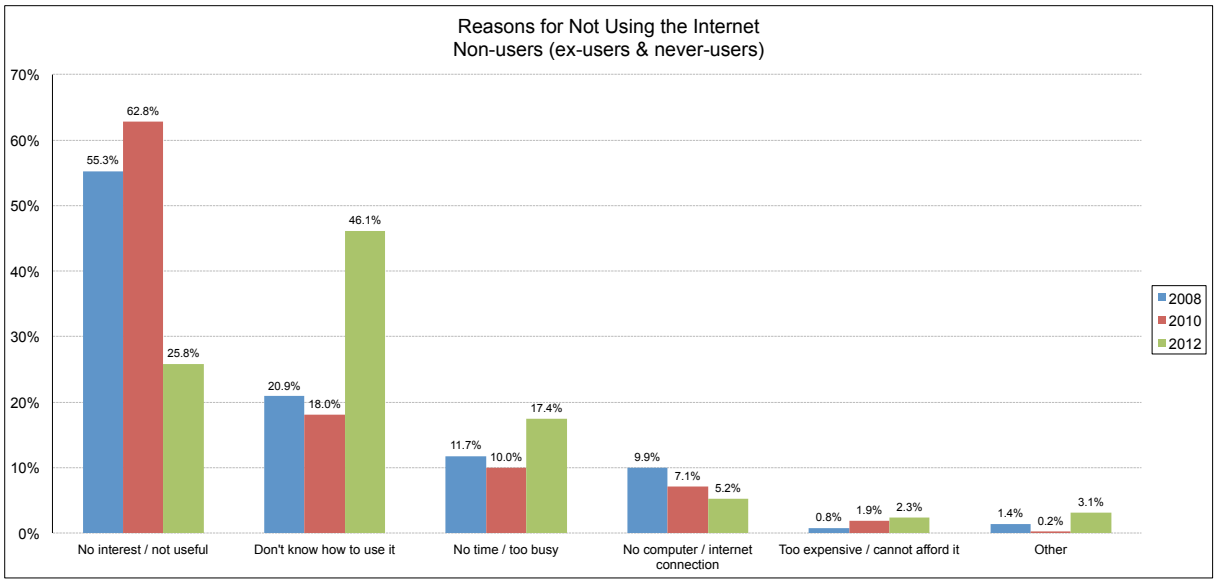

Figure 1.1.5.2. *Reasons for not using the internet*

The "other" reasons given in 2012 by ex-users (Figure 1.1.5.3) were coded as lack of time (35.1% in 2012), no interest in using the internet (13.8% in 2012) and unemployment (19.1% in 2012).

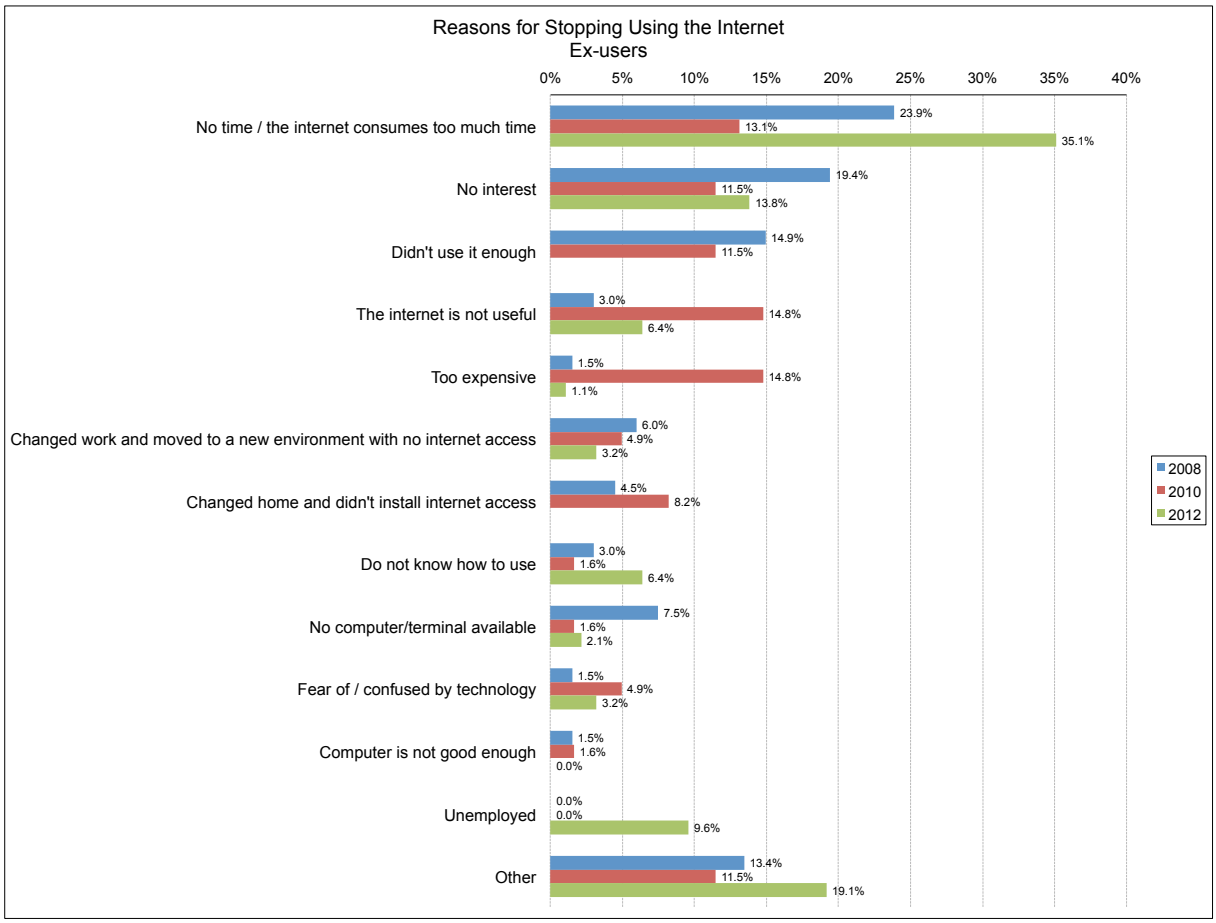

Figure 1.1.5.3. *Reasons for stopping using the internet*

Figure 1.1.5.4 shows that certainty about not using of the internet within the next year has decreased by almost 15 percentage points (66.9% in 2010, 52.0% in 2012).

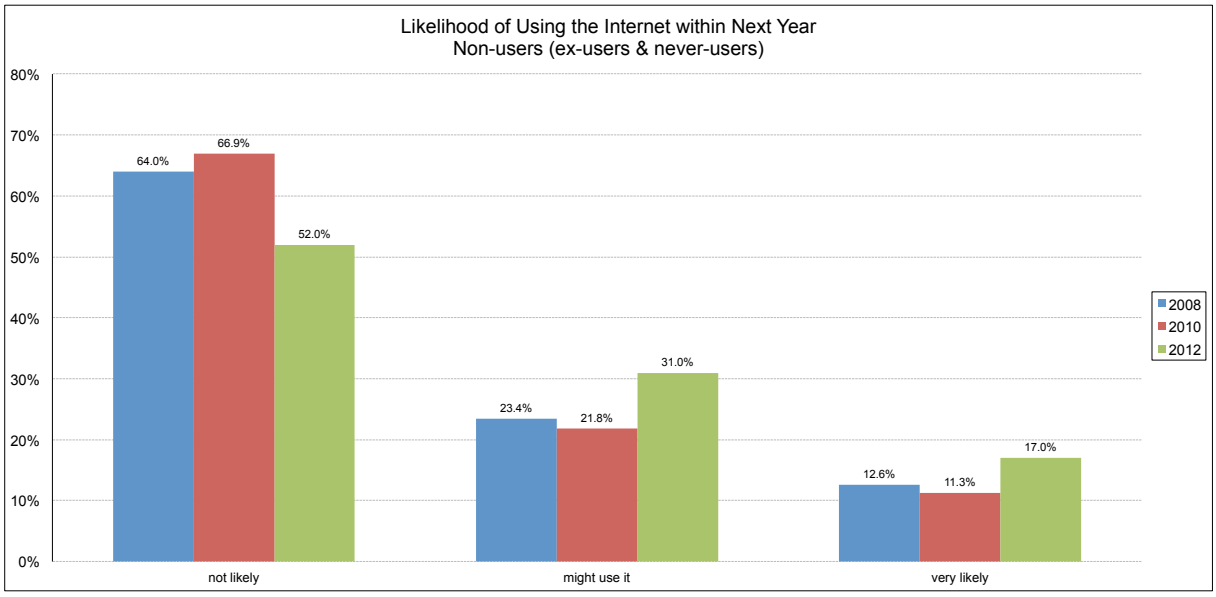

Figure 1.1.5.4. *Likelihood of using the internet within next year*

1.2. SOURCES OF INFORMATION AND ENTERTAINMENT

1.2.1. The Internet

The internet seems to be gaining importance as a source of information among Greek-Cypriots. As demonstrated in Figure 1.2.1.1, almost 87% of Greek-Cypriot users consider the internet an important or very important source of information, while the corresponding figure in 2010 was only 66.5%.

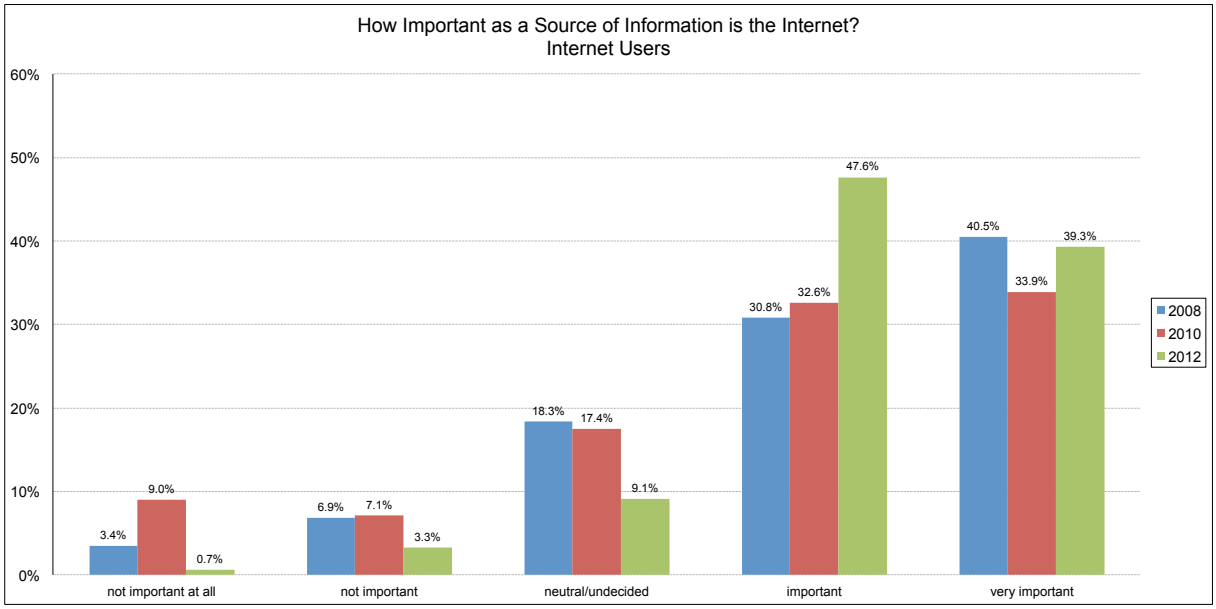

Figure 1.2.1.1. *Importance of the internet for information*

Greek-Cypriots seem to be becoming more distrustful of the internet: the majority internet users (55.6%) believes that only about half of the information on the internet is reliable (Figure 1.2.1.2). In 2012, only 28.7% of the users believe that most or all of the information on the internet is reliable, while the corresponding figure for 2010 is 59.7%.

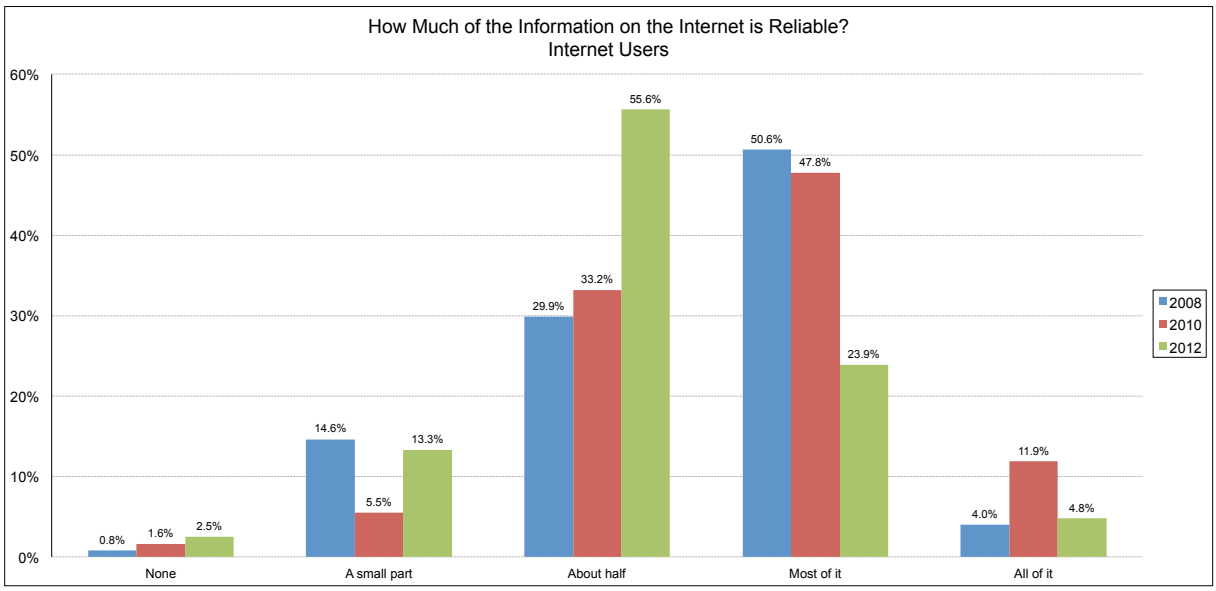

Figure 1.2.1.2. *Internet reliability*

The internet is also an important source of entertainment. In 2012, most Greek-Cypriot users (72.8%) say that the internet is an important or very important source of entertainment.

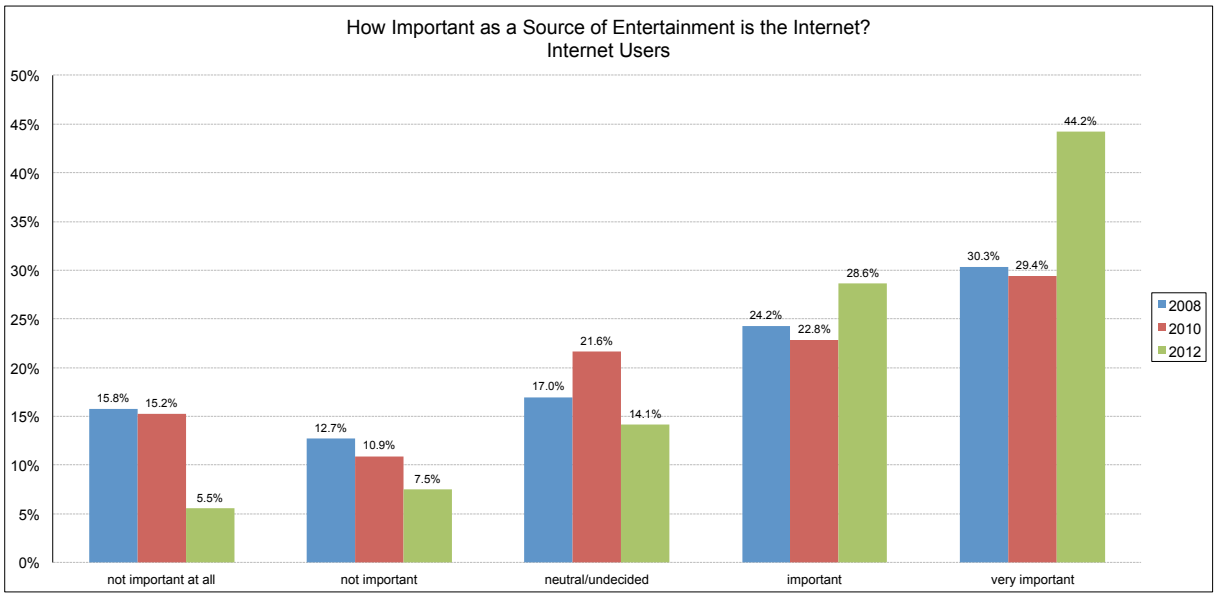

Figure 1.2.1.3. *Importance of the internet for entertainment*

1.2.2. Television

Most Greek-Cypriot internet users (69.0%) report that television provides an important or very important source of information (Figure 1.2.2.1).

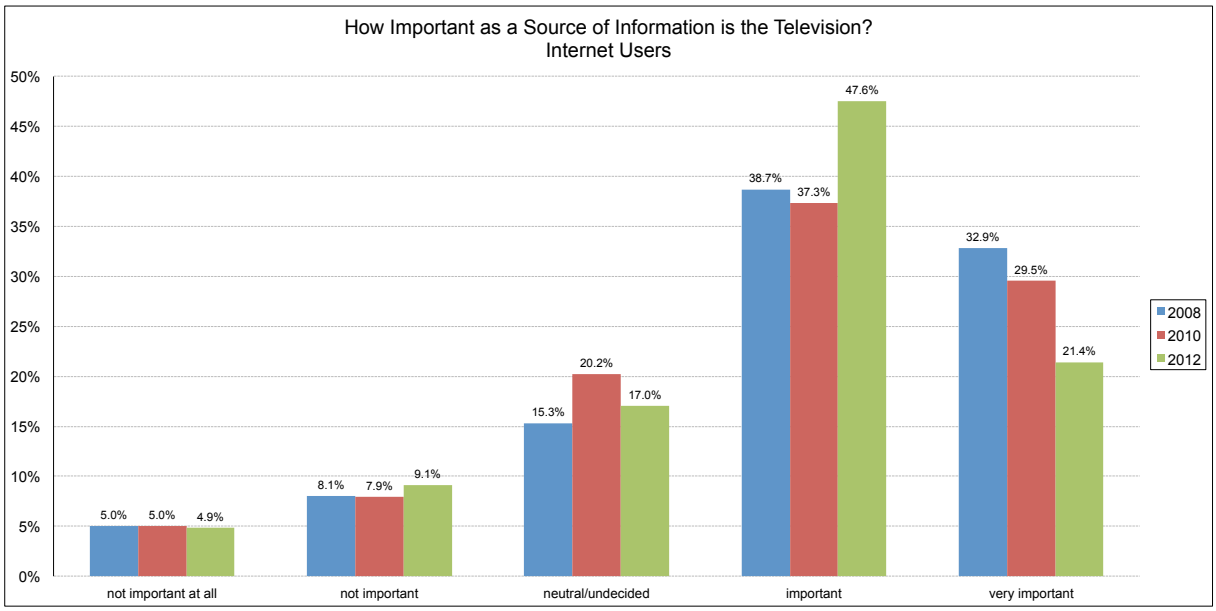

Figure 1.2.2.1. *Importance of television for information*

Greek-Cypriot internet users also think that television is an important or very important source of entertainment (Figure 1.2.2.2).

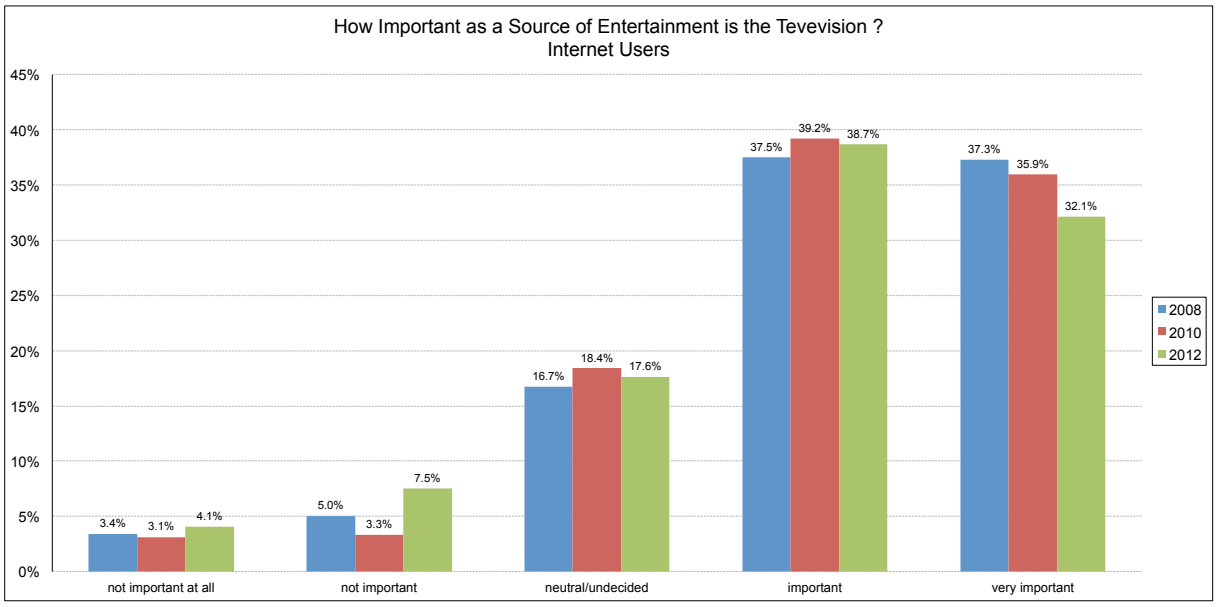

Figure 1.2.2.2. *Importance of television for entertainment*

1.2.3. Newspapers

Newspapers seem to be gaining importance as a source of information among Greek-Cypriot internet users. A significant shift of almost 24 percentage points (63.5% in 2012 vs 39.2% in 2010) in shown in Figure 1.2.3.1. This finding may be the result of the 2013 pre-election campaign, which may have contributed in raising the importance of the partisan press in Cyprus.

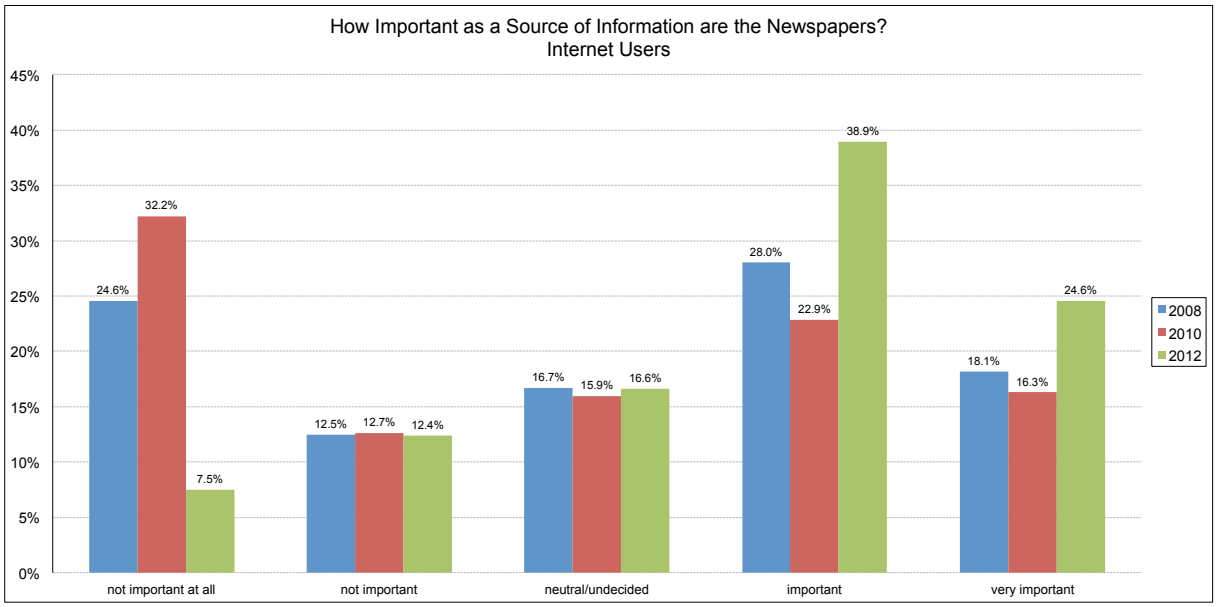

Figure 1.2.3.1. *Importance of newspapers for information*

Newspapers remain the least important source of entertainment. For 55.3% of Greek-Cypriot internet users, newspapers are not important or not important at all as a source of entertainment (Figure 1.2.3.2). Still, it should be noted that internet users who consider the newspapers as an important source of entertainment have increased by almost 10 percentage points (22.0% in 2012 from 12.9% in 2010).

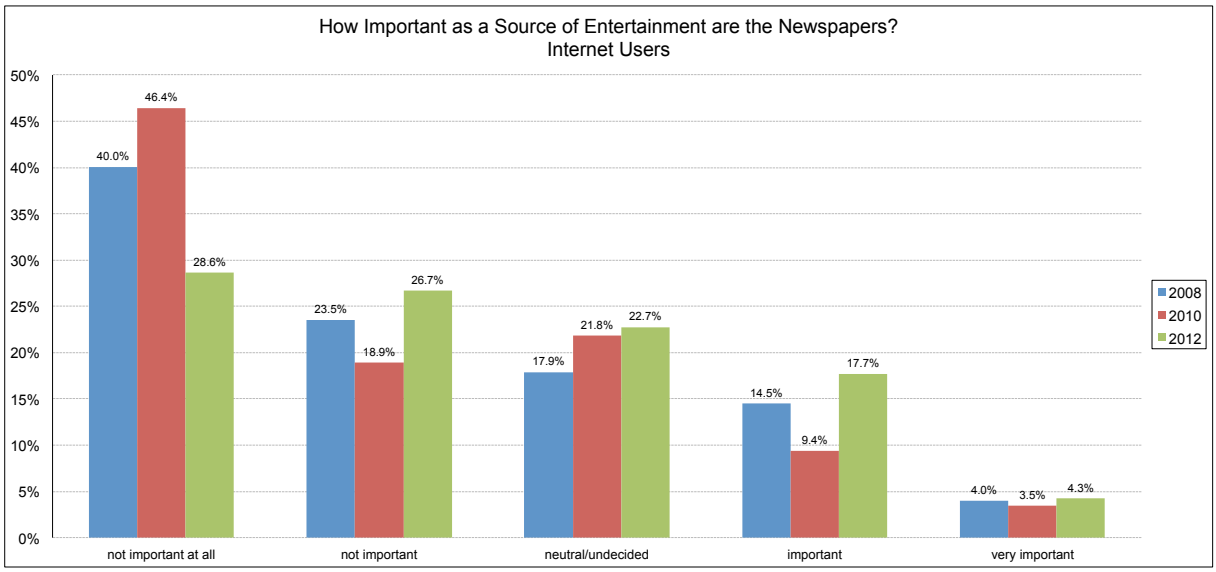

Figure 1.2.3.2. *Importance of newspapers for entertainment*

1.2.4. Radio

The pattern is similar concerning the importance of the radio as a source of information (Figure 1.2.4.1): 54.5% of Greek-Cypriot internet users consider the radio an important or very important source of information (an increase of about 18 percentage units since 2010).

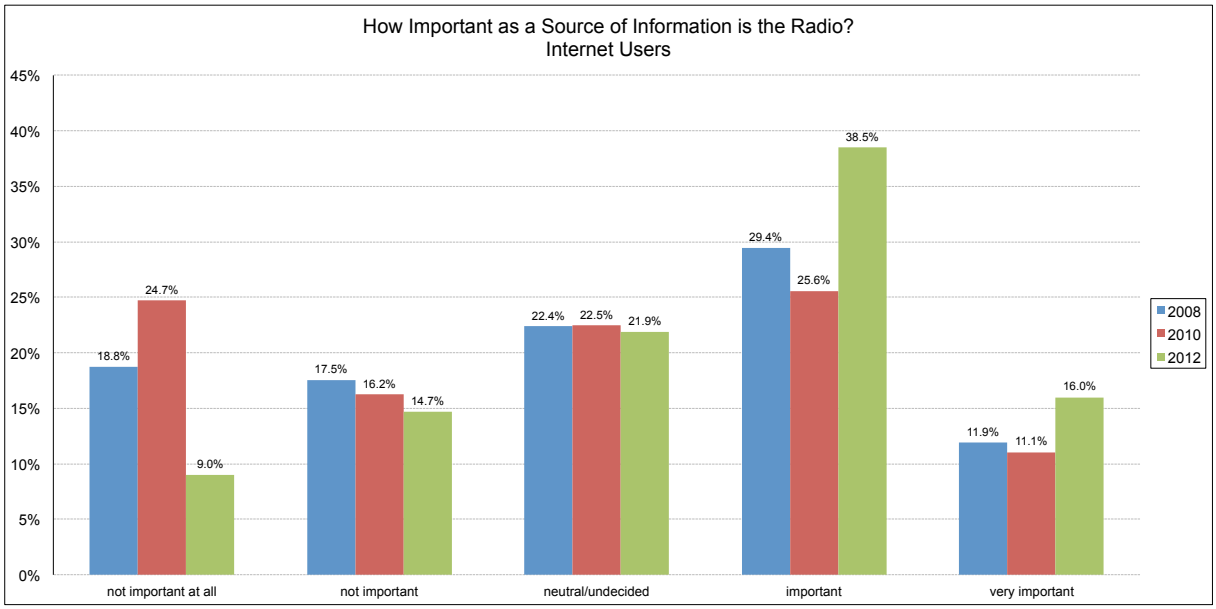

Figure 1.2.4.1. *Importance of radio for information*

Figure 1.2.4.2 shows that the radio is an important or very important source of entertainment for the majority of internet users in 2012 (60.4%). The percentage of internet users who are negative regarding radio's entertainment value has decreased significantly (from 30.9% in 2010 to 22.5% in 2012).

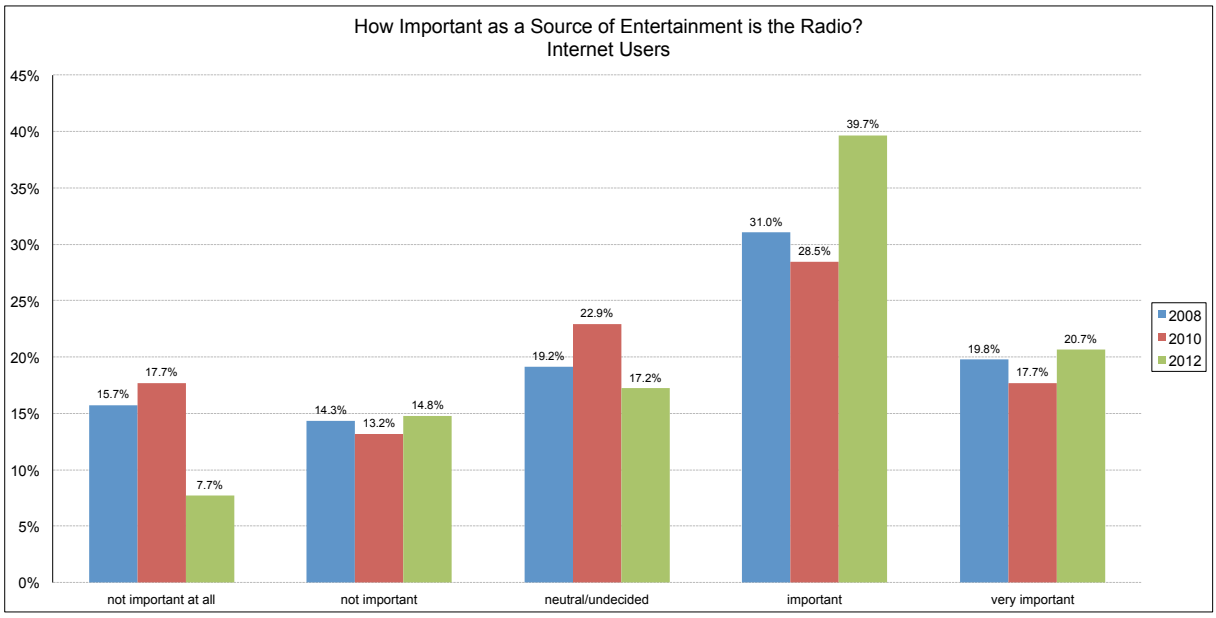

Figure 1.2.4.2. *Importance of radio for entertainment*

1.2.5. Interpersonal sources

Interpersonal relationships appear to be important or very important as a source of information for 77.0% of Greek-Cypriot internet users (Figure 1.2.5.1).

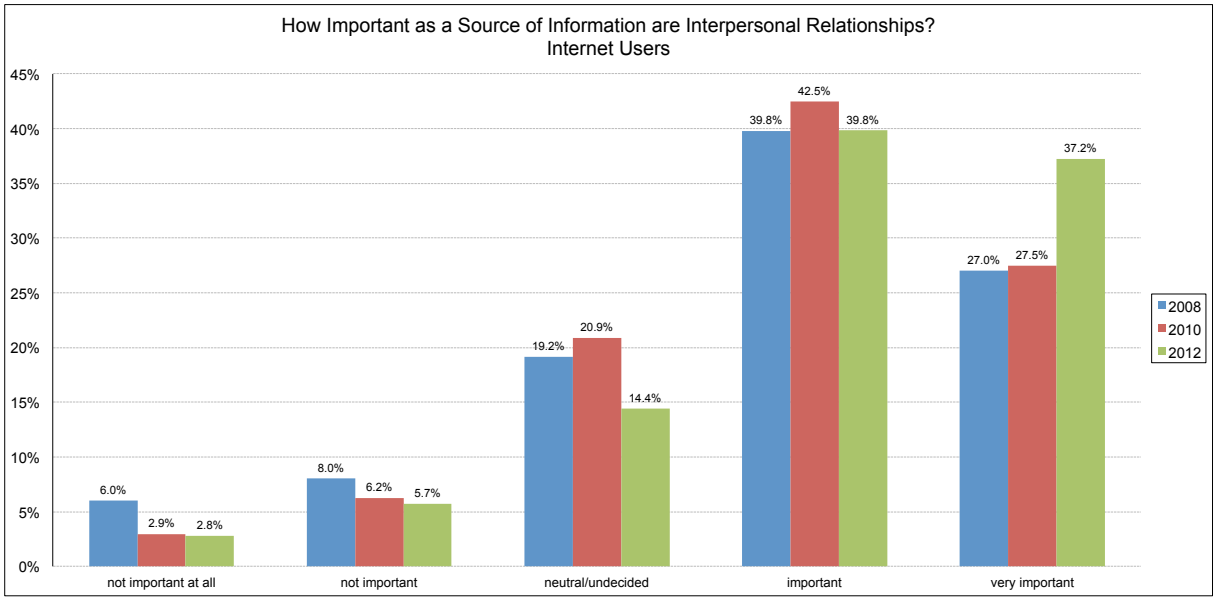

Figure 1.2.5.1. *Importance of interpersonal sources for information*

1.3. TRADITIONAL MEDIA USE

1.3.1. Television

Greek-Cypriot internet users have reduced the time they spend watching television, as in 2012 3.0% stated that they do not watch television at all and 32.3% stated that they watch television for 7 hours per week or less, with the corresponding figures for 2010 being 0.9% and 22.0% (Figure 1.3.1.1). Compared to 2010, internet users who watch television for 14 hours or more per week have decreased from 49.5% to 35.8%.

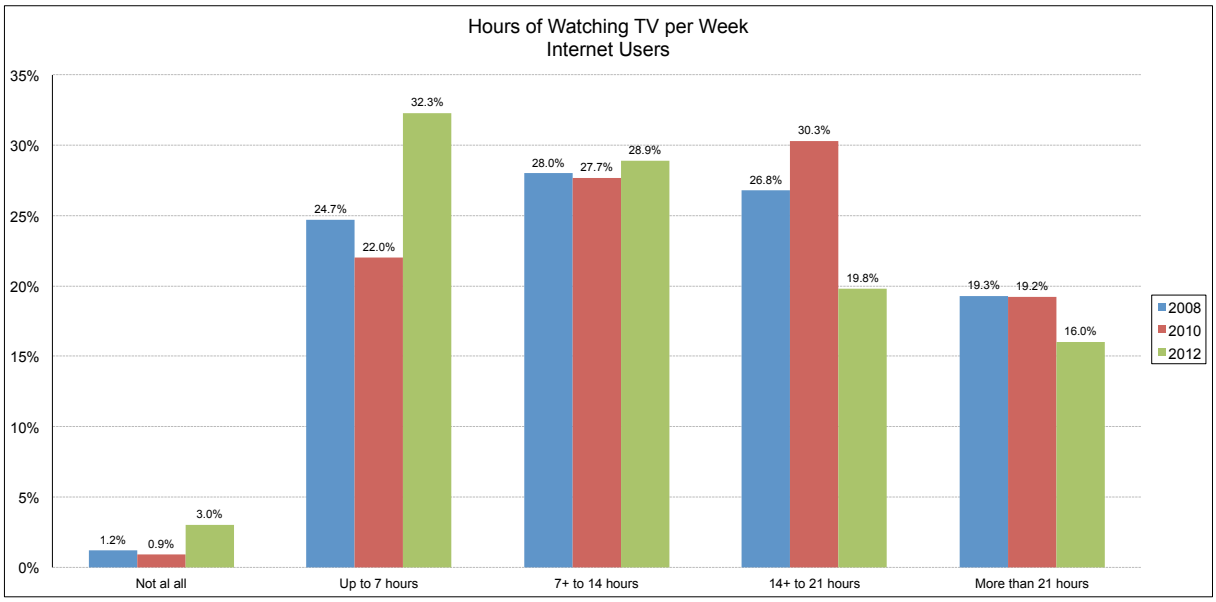

Figure 1.3.1.1. *Hours of TV viewing*

1.3.2. Radio

About half (47.9%) of internet users in the Greek-Cypriot community listen to the radio for up to 7 hours per week (Figure 1.3.2.1).

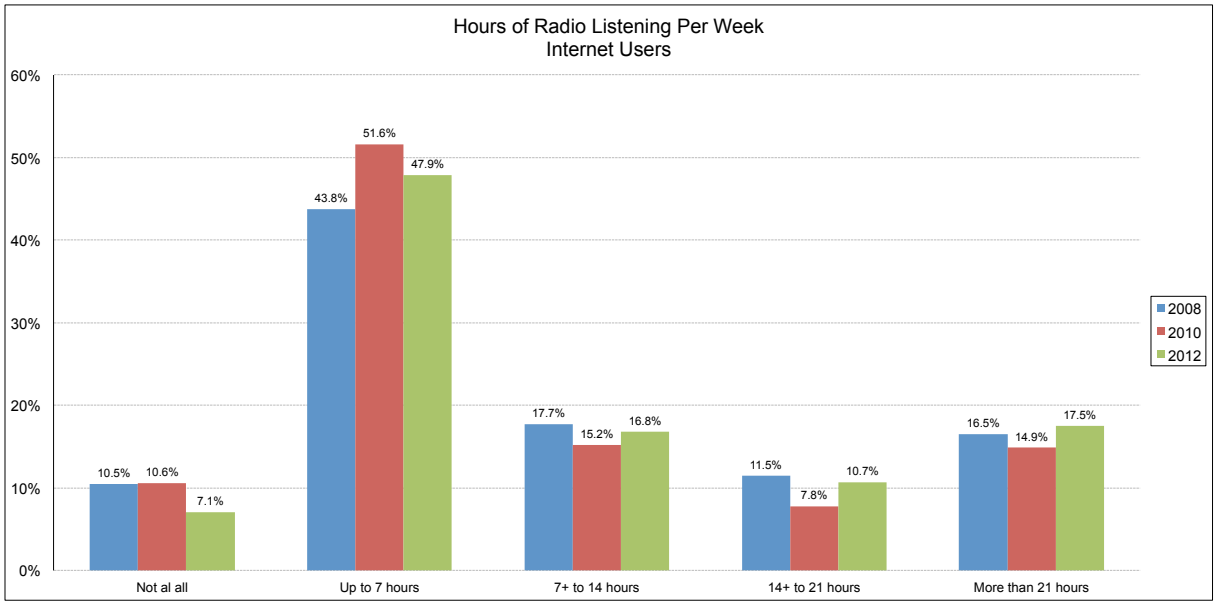

Figure 1.3.2.1. *Hours of radio listening*

1.3.3. Newspapers

Newspaper readership rates continue to be very low in Cyprus. The majority of Greek-Cypriot internet users spend up to 7 hours per week reading newspapers (57.1%). Greek-Cypriots who read newspapers for more than 7 hours weekly constitute a minority (10.8%), although there is a notable increase in this group since 2010 (Figure 1.3.3.1).

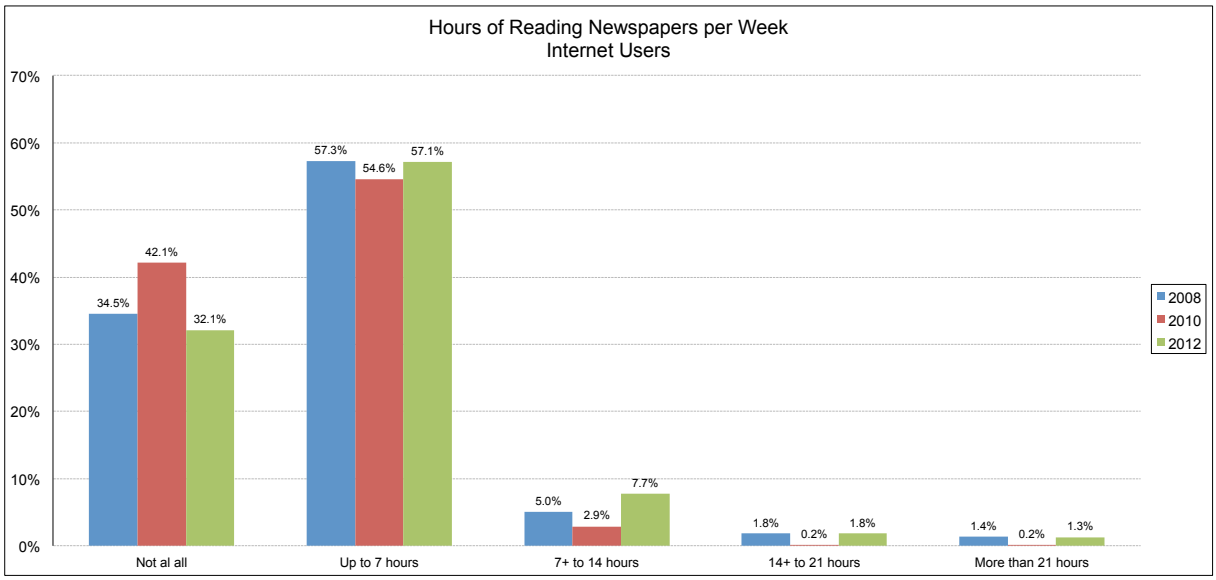

Figure 1.3.3.1. *Hours of newspaper reading*

1.3.4. Comparison of Internet Users and Non-Users

A common hypothesis among researchers and media professionals is that internet use reduces the time spent using other media. Comparative examination of Greek-Cypriot internet users' and non-users' media habits in 2012 reveals more considerable discrepancies in television viewing, shows small differences in radio listening and does not reveal significant discrepancies in newspaper reading.

Internet users tend to watch television fewer hours per week than non-users (Figure 1.3.4.1). The differences are more apparent at the two extremes: 32.3% of internet users watch television for up to 7 hours a week, with the respective percentage for non-users being 22.8%. The situation is reversed in the case of heavy viewers, as 29.3% of non-users spend more than 21 hours weekly watching television, whereas the corresponding figure for users is 16%.

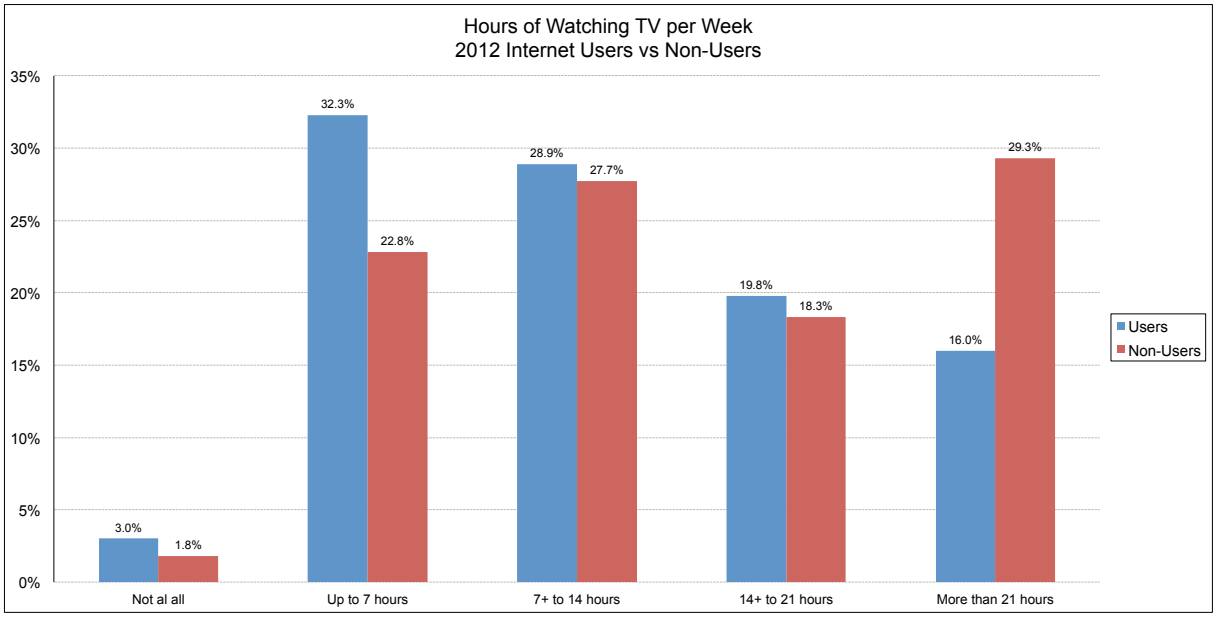

Figure 1.3.4.1. *Hours of TV viewing (users and non-users of the internet)*

Almost half of internet users (47.9%) listen to the radio for up to 7 hours weekly, whereas the respective rate for non-users is more than 12 percentage units lower (35.6%). More non-users (24.5%) than users (7.1%) do not listen to the radio at all (Figure 1.3.4.2).

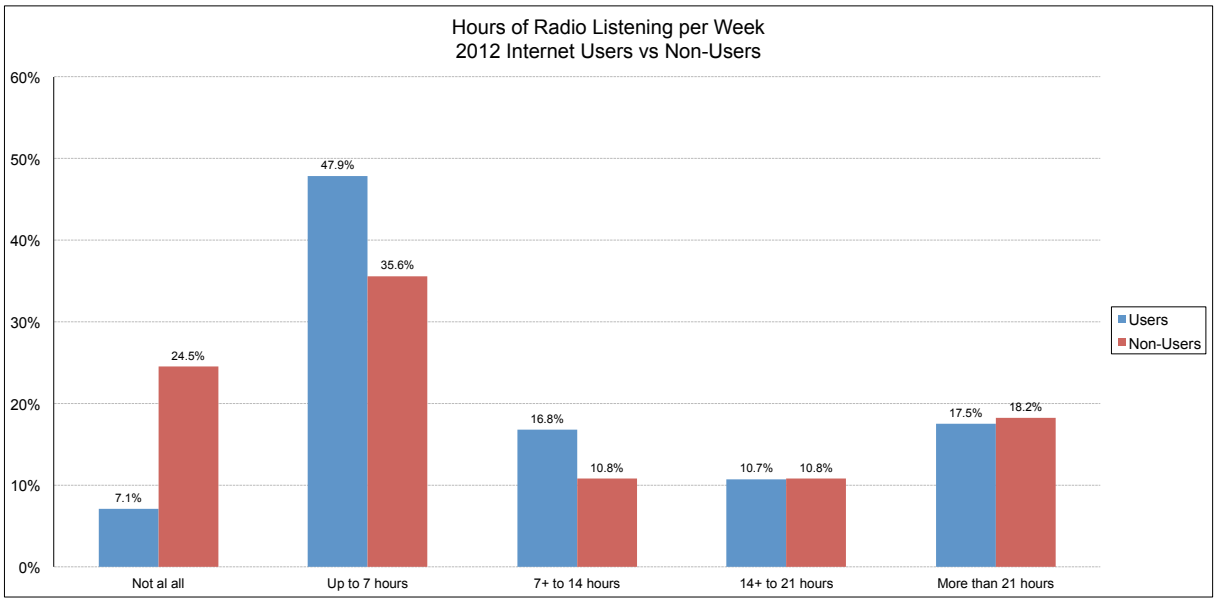

Figure 1.3.4.2. *Hours of radio listening (users and non-users of the internet)*

Newspaper reading seems to be practically unaffected by internet use, as both users and non-users share almost the same reading (or non-reading) habits (Figure 1.3.4.3).

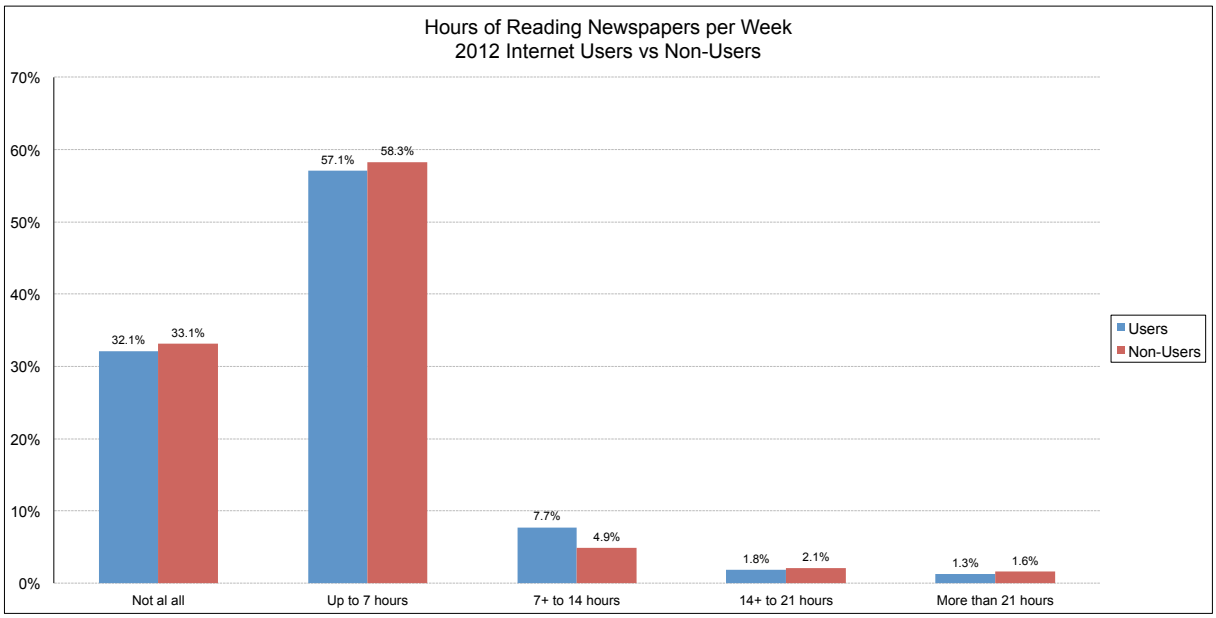

Figure 1.3.4.3. *Hours of newspaper reading (users and non-users of the internet)*

Summarizing the above comparisons, Greek-Cypriots who do not use the internet spend more time watching television than internet users, while there are no apparent differences regarding exposure to the other traditional media (Figure 1.3.4.4). Therefore, no substitution or "cannibalization" function of the internet towards the other media is observed.

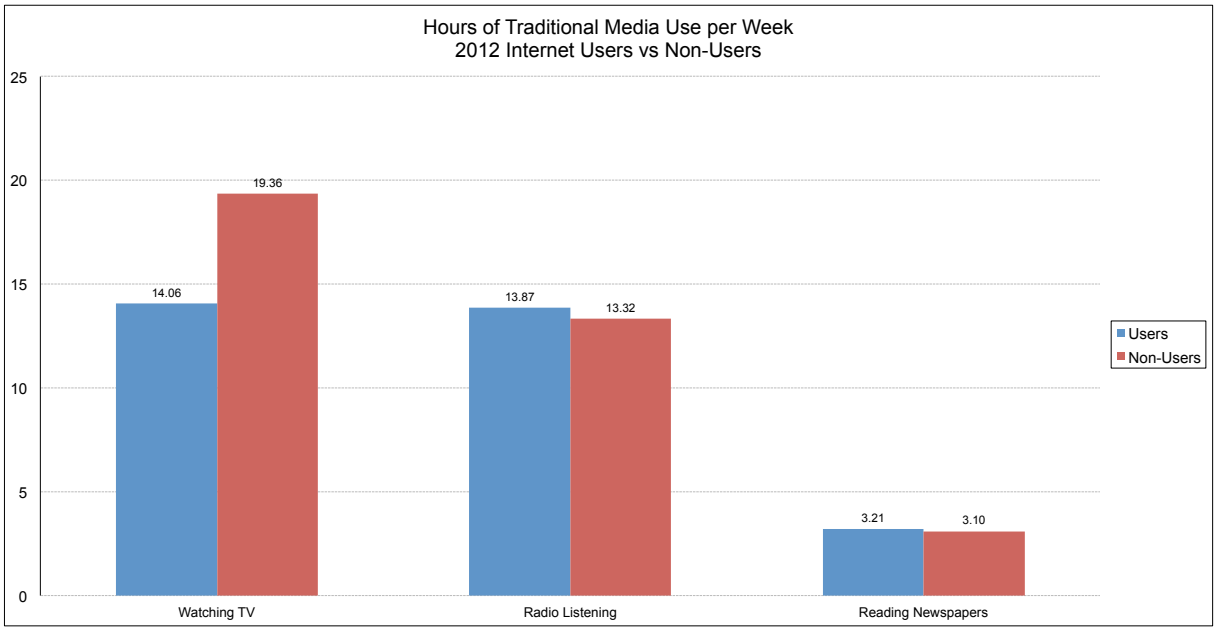

Figure 1.3.4.4. *Hours of use of traditional media*

1.4. SOCIAL RELATIONSHIPS AND COMMUNICATION

1.4.1. Social Relationships

Concerning the effect of internet use on social relationships, 30.2% of Greek-Cypriot users feel that contact with people who share similar interests has increased or greatly increased since connecting to the internet and only 7.6% feel that it has decreased or greatly decreased (Figure 1.4.1.1). The majority (62.1%) feels that the internet has not affected this kind of contact.

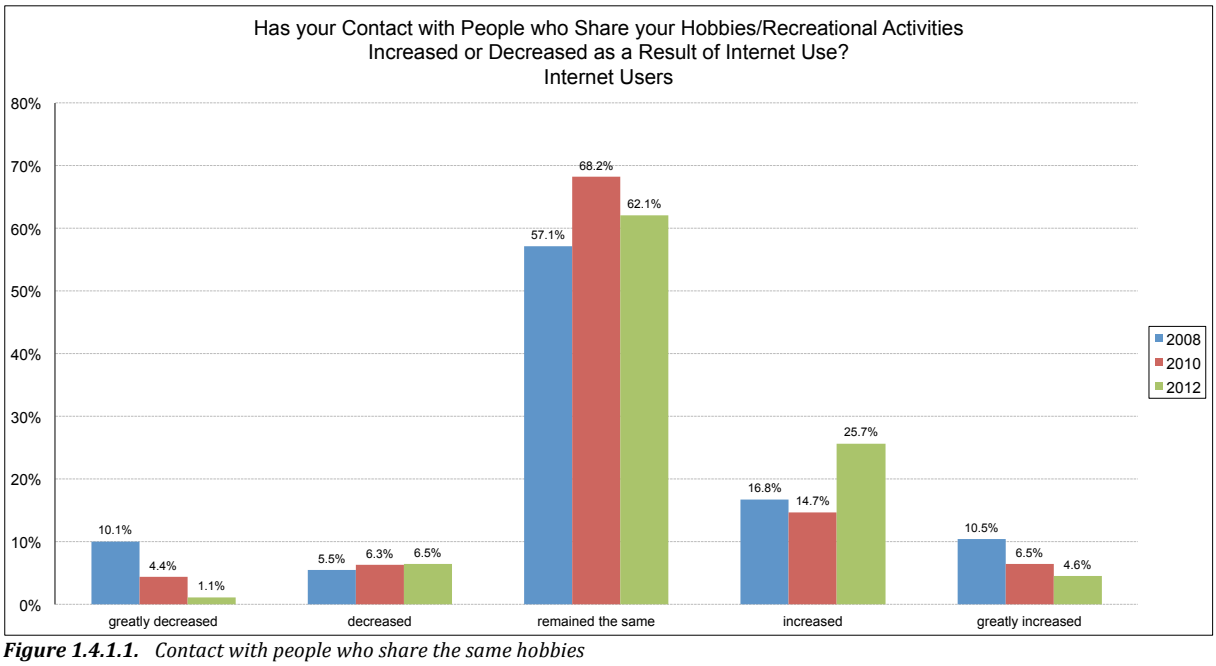

Figure 1.4.1.1. *Contact with people who share the same hobbies*

Similarly, 8.6% of Greek-Cypriot users feel that the time they spent with people sharing a common political ideology decreased or greatly decreased since being connected to

the internet, whereas 17.3% of Greek-Cypriot users think that it has increased or greatly increased. The majority of internet users (74.2%) state that contact with people who share their political views is largely unaffected by internet use (Figure 1.4.1.2).

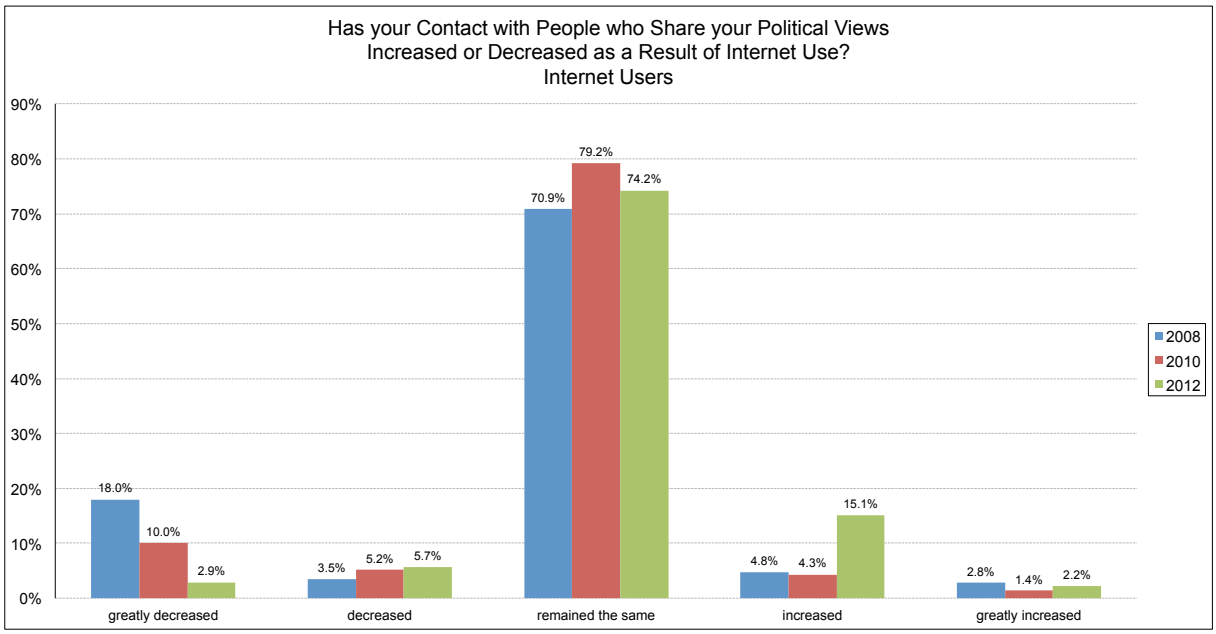

Figure 1.4.1.2. *Contact with people who share the same political views*

Most Greek-Cypriots (84.4%) do not think that the internet has had an impact on their contact with people with similar religious beliefs. Only 7.3% of users in the sample feel that this contact has decreased or greatly decreased since being connected to the internet. At the other end, 8.4% note that their contact with people with similar religious beliefs has increased or greatly increased (Figure 1.4.1.3).

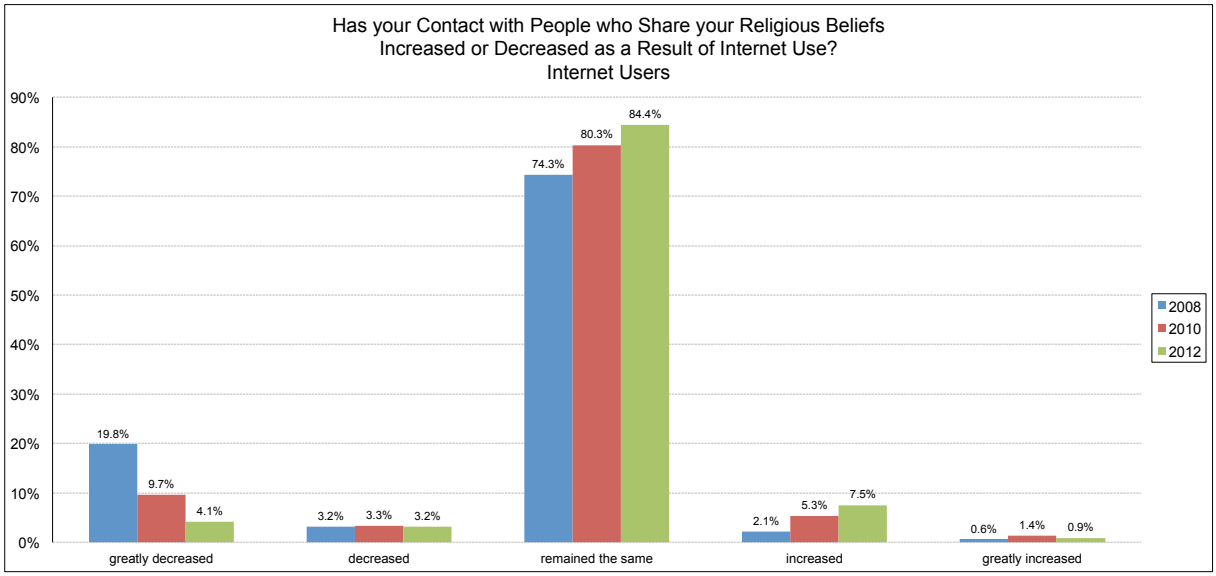

Figure 1.4.1.3. *Contact with people who share the same religious beliefs*

Compared to the 2010 measurement, more Greek-Cypriot users tend to believe that the internet had a positive impact on their professional contacts. In fact, 52.5% of the Greek-Cypriot users feel that their internet activities helped them improve their professional relations, as opposed to 16.3% in 2010 (Figure 1.4.1.4).

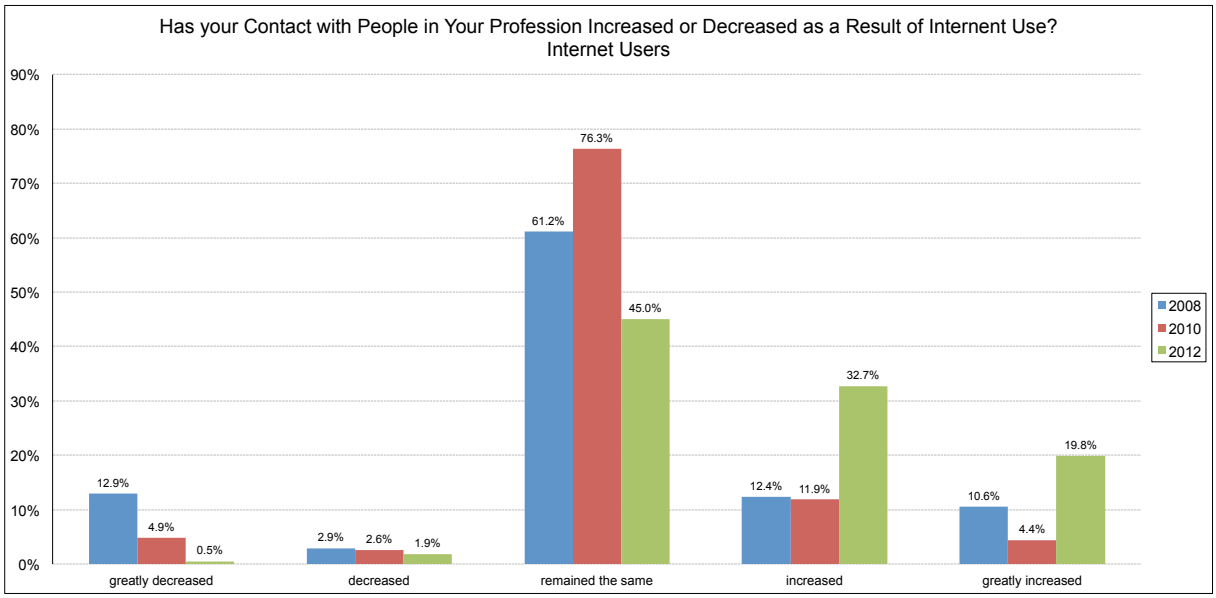

Figure 1.4.1.4. *Contact with colleagues*

Relationships with family members have undergone some change because of internet use. Although most Greek-Cypriot internet users (59.8% in 2012 as opposed to 77.3% in 2010) feel that intimate relationships have remained intact, the percentage of internet users who experience a positive effect of the internet on their family relations has increased dramatically from 11.2% in 2010 to 30.1% in 2012 (Figure 1.4.1.5).

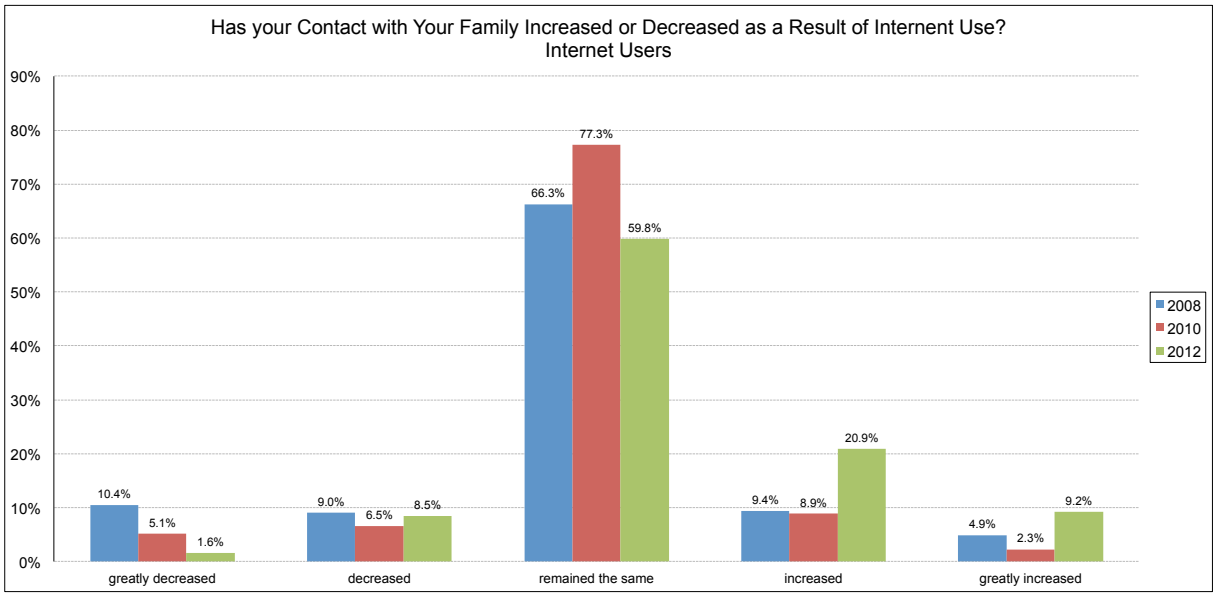

Figure 1.4.1.5. *Contact with family*

An even higher proportion of Greek-Cypriot internet users feels that the internet has had a positive impact on socializing with friends. Figure 1.4.1.6 shows that 55.4% feel that contact with their friends increased or greatly increased since being connected to the internet, while the percentage of users who believe that relations with their friends have not been affected by internet use has dropped from 66.5% in 2010 to 40.6% in 2012.

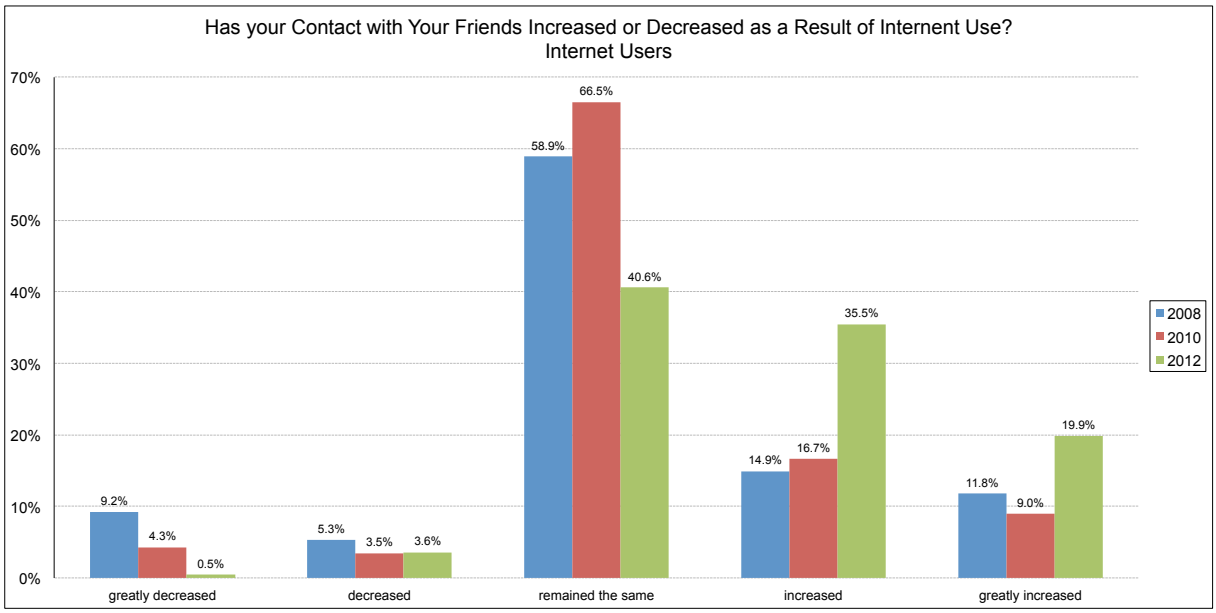

Figure 1.4.1.6. *Contact with friends*

1.4.2. Time Spent with Friends and Family

Comparison of 2008, 2010 and 2012 data reveals that the habits of Greek-Cypriot internet users with respect to spending time with their family have not changed much (Figure 1.4.2.1).

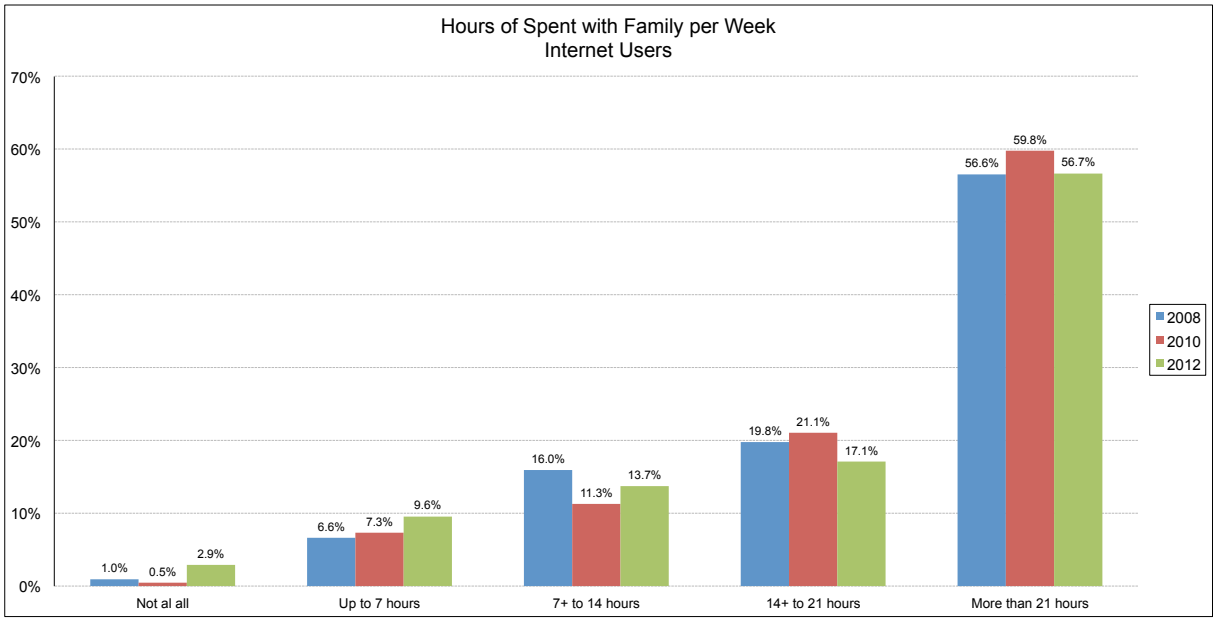

Figure 1.4.2.1. *Time spent with family*

Concerning spending time with friends, Greek-Cypriots internet users also seem to not have changed their habits since 2008 (Figure 1.4.2.2).

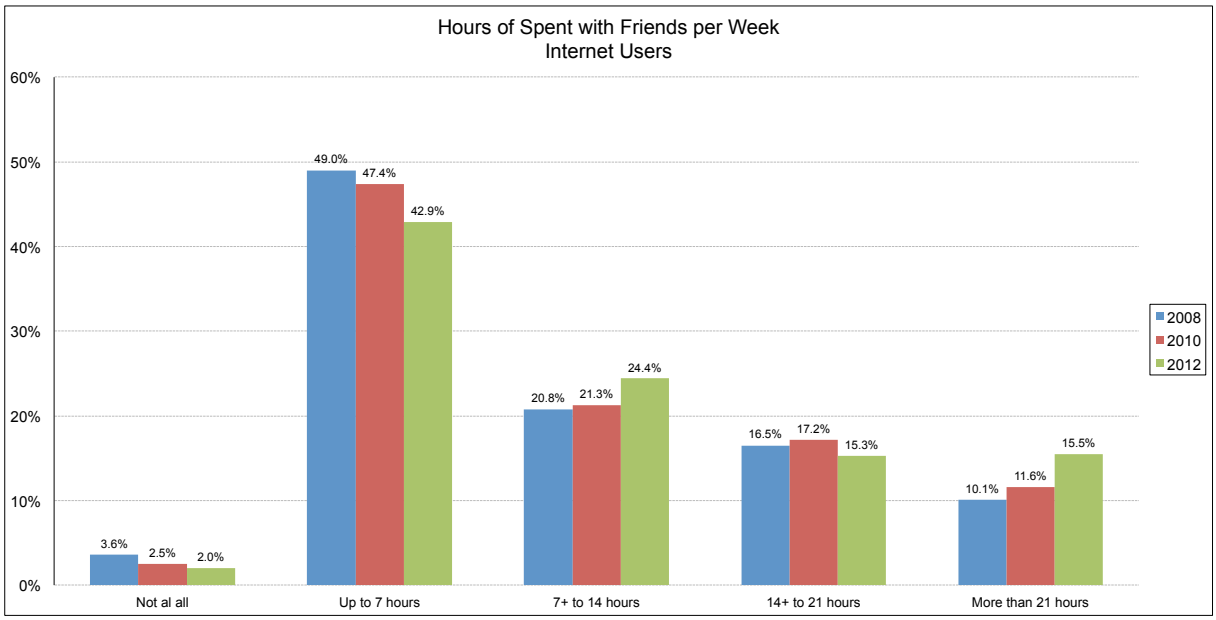

Figure 1.4.2.2. *Time spent with friends*

Despite the above, Greek-Cypriot users spend fewer hours per week with their families than non-users. In fact, 56.7% of internet users spend more than 21 hours with their families, compared to 65.6% of non-users (Figure 1.4.2.3).

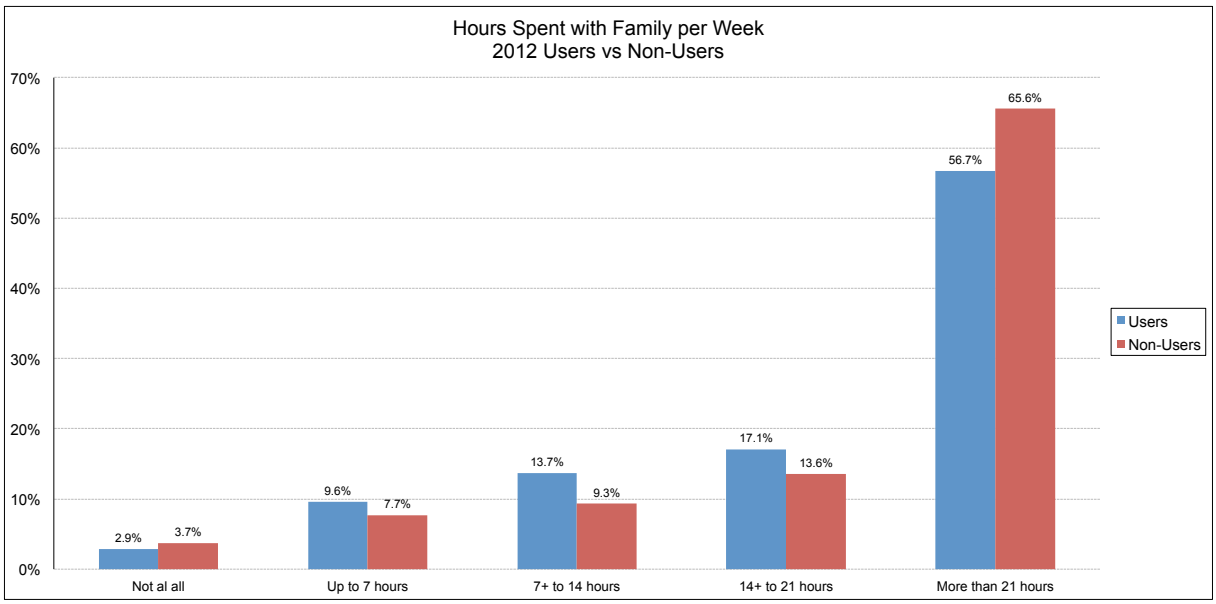

Figure 1.4.2.3. *Hours spent with family per week.*

The picture is reversed regarding the time the respondents spend with their friends. As it is demonstrated in Figure 1.4.2.4, internet users spend significantly more time with friends than non-users.

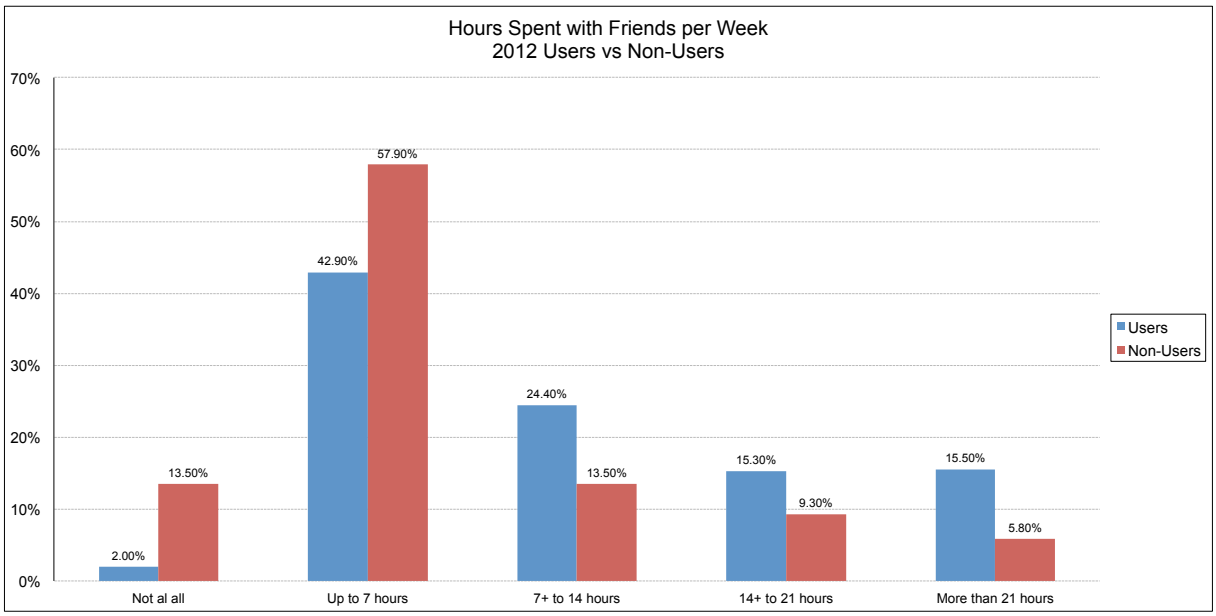

Figure 1.4.2.4. *Hours spent with friends per week*

1.4.3. Communication with Other People

With respect to communication with other people, as Figures 1.4.3.1 to 1.4.3.11 show, the email (Figure 1.4.3.1) remains the most popular form of communication and its importance seems to be growing. Increases are also observed in instant messaging (Figure 1.4.3.2), chat room participation (Figure 1.4.3.3), sending email attachments (Figure 1.4.3.4), making phone calls over the internet (Figure 1.4.3.5) and updating one's status in the social media (Figure 1.4.3.10), which indicates that online communication is becoming more popular among Greek-Cypriots. On the other hand, working on one's blog (Figure 1.4.3.6), posting photos or pictures on the internet (Figure 1.4.3.7), uploading music videos (Figure 1.4.3.8), participation in discussion boards (Figure 1.4.3.9) and commenting on blogs and message boards (Figure 1.4.3.11) have remained relatively stable in terms of frequency of involvement.

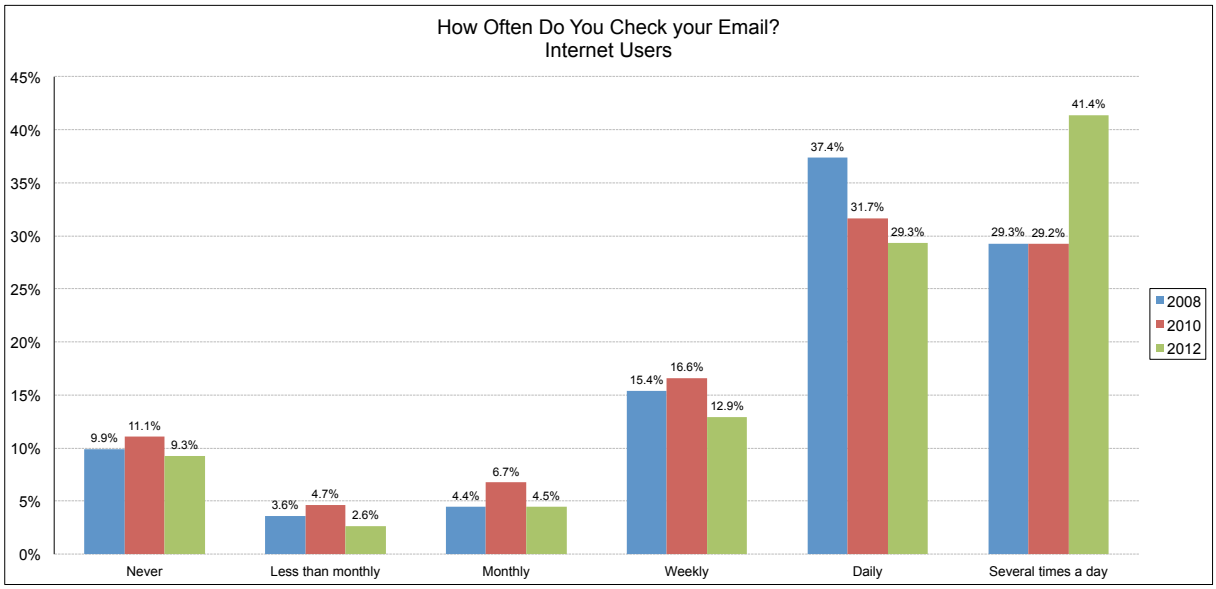

Figure 1.4.3.1. *E-mail use*

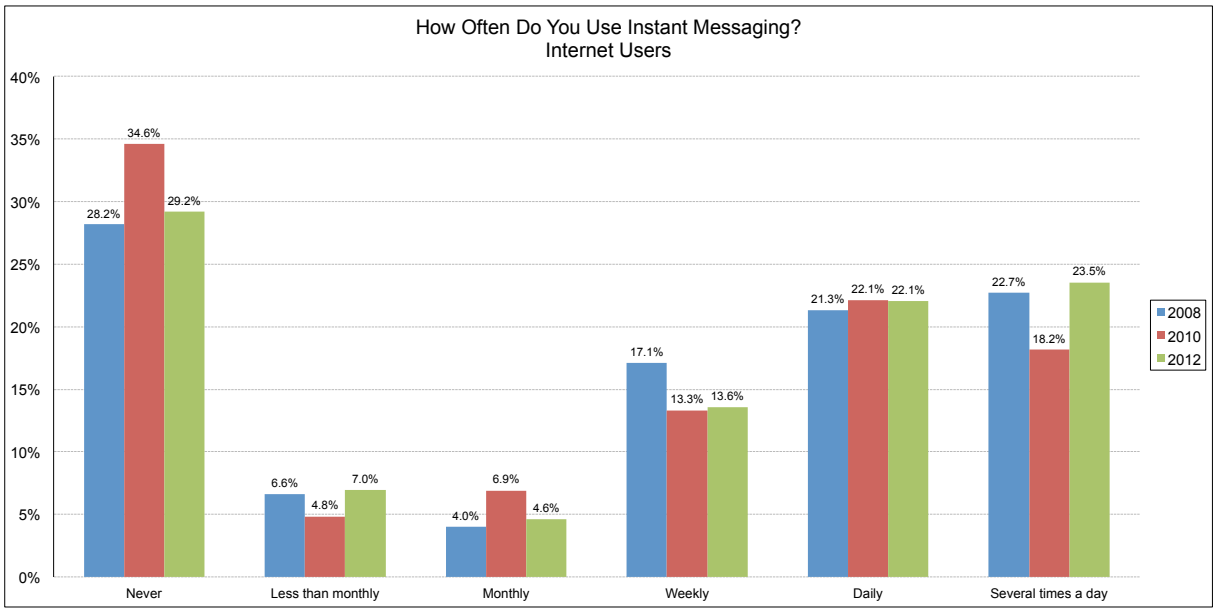

Figure 1.4.3.2. *Instant messaging*

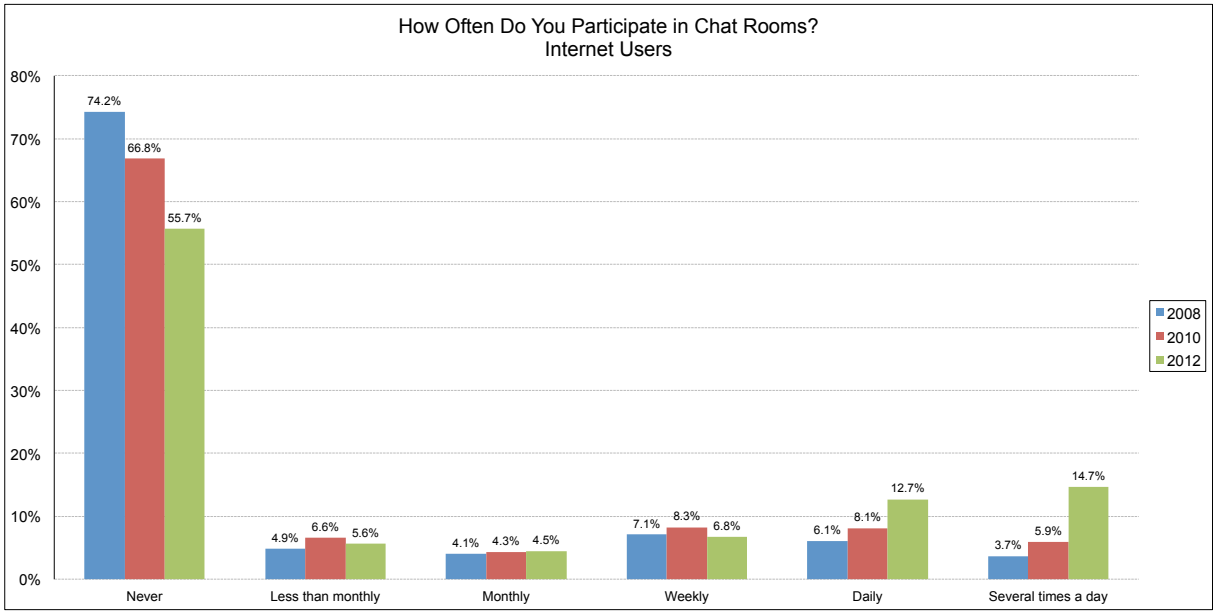

Figure 1.4.3.3. *Participation in chat rooms*

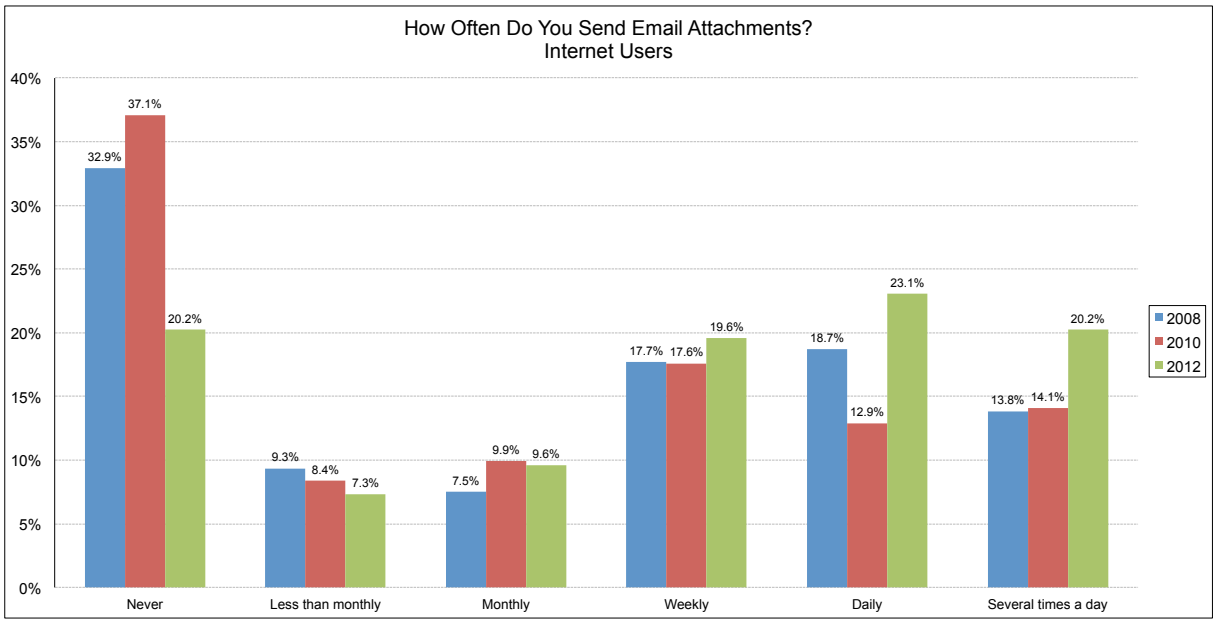

Figure 1.4.3.4. *Sending e-mail attachments*

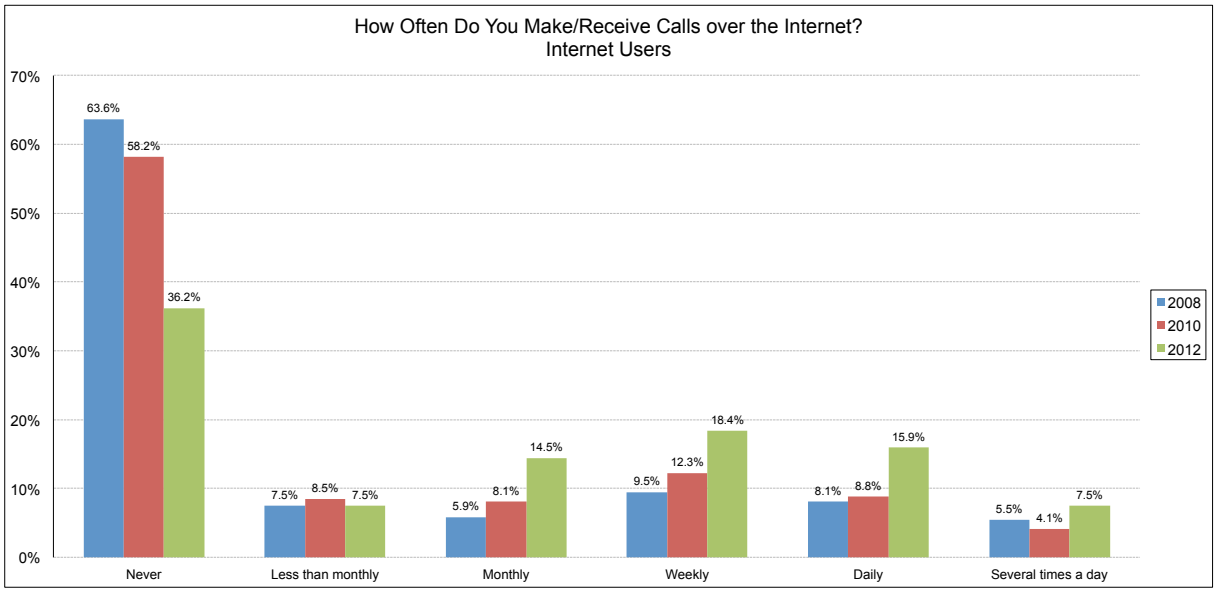

Figure 1.4.3.5. *Calls over the internet*

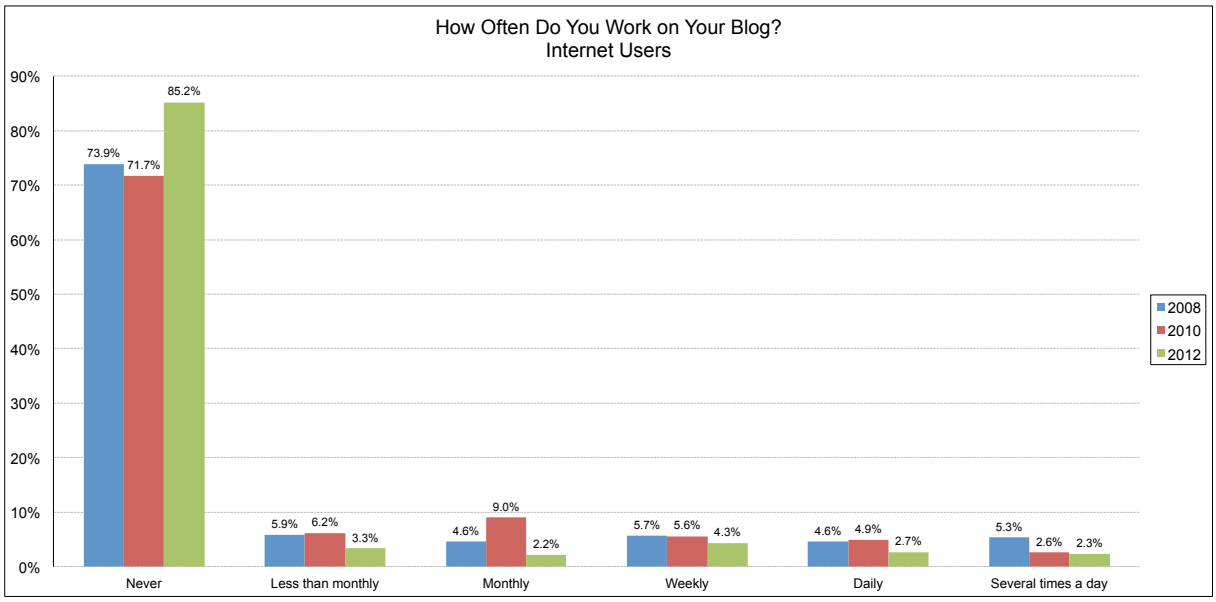

Figure 1.4.3.6. *Working on blogs*

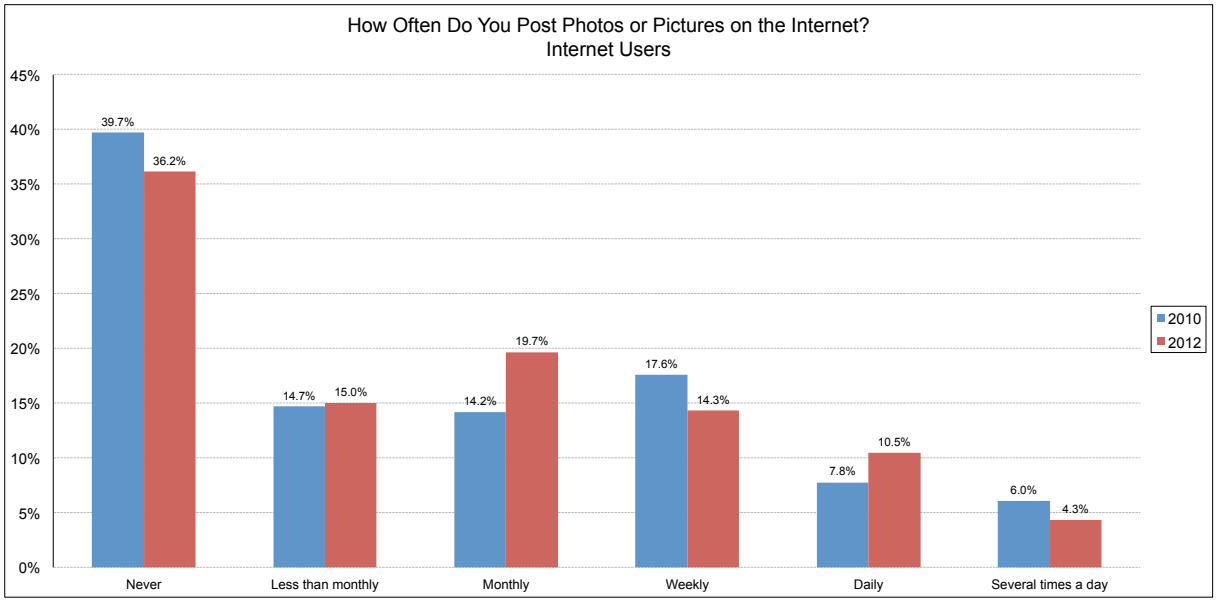

Figure 1.4.3.7. *Posting photos or pictures on the internet*

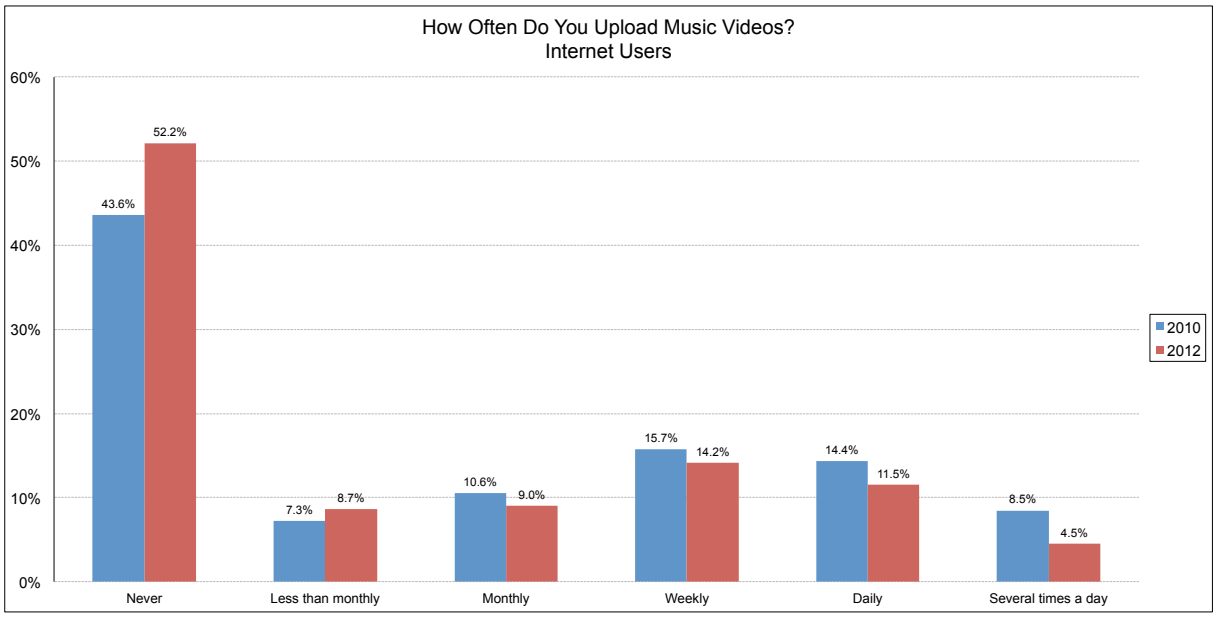

Figure 1.4.3.8. *Uploading music videos*

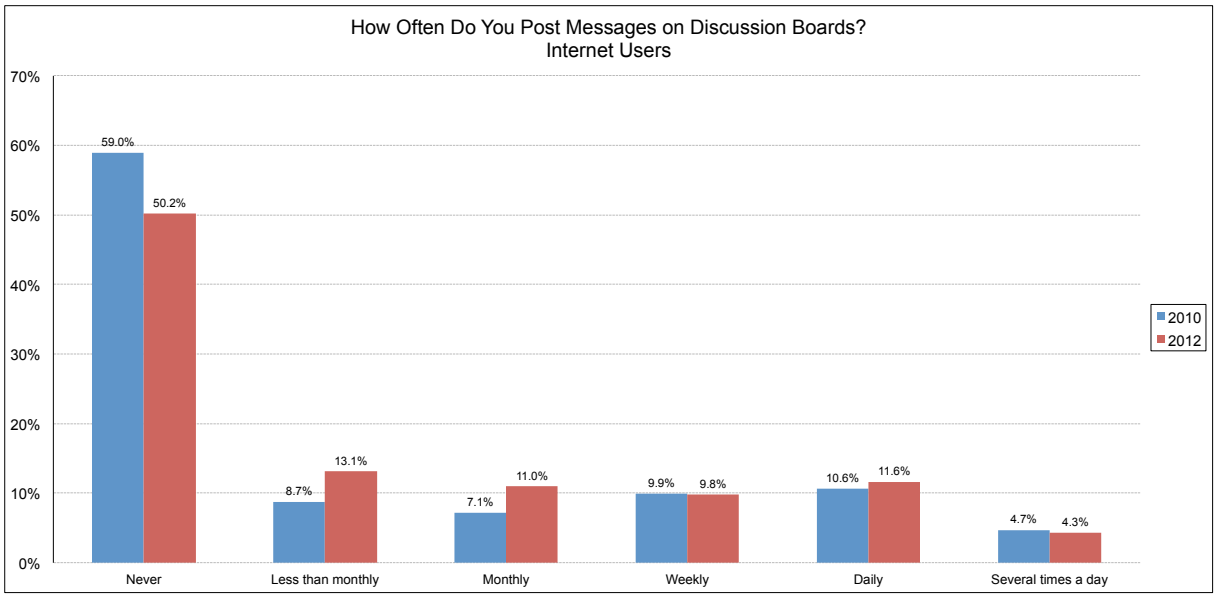

Figure 1.4.3.9. *Participation in discussion boards*

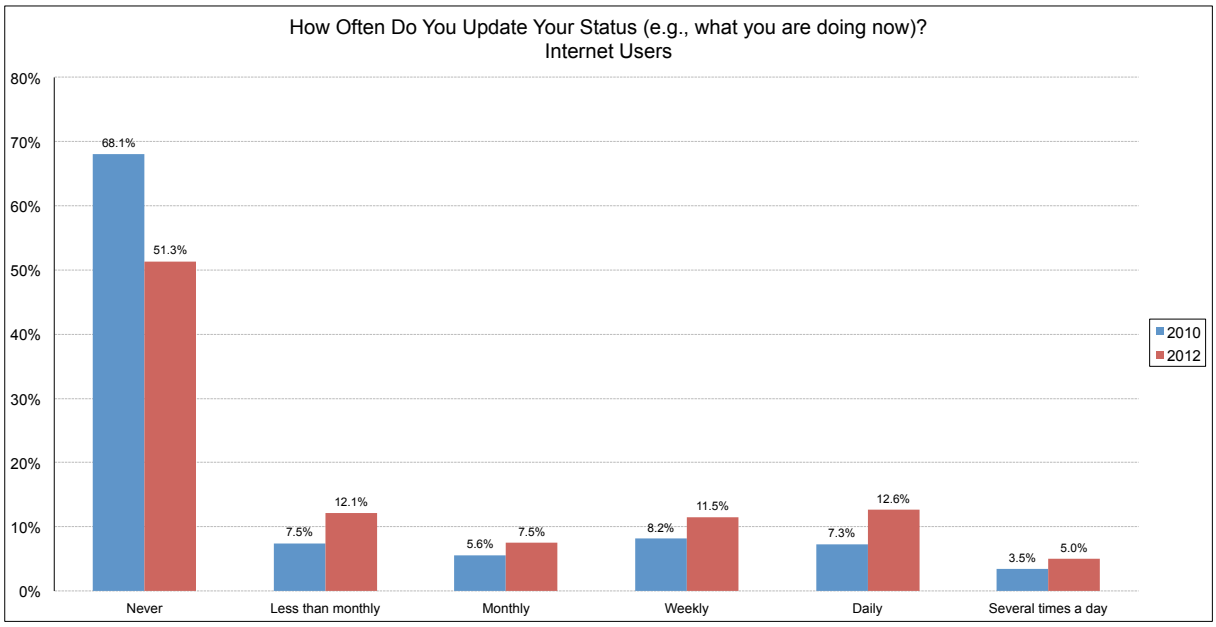

Figure 1.4.3.10. *Updating status*

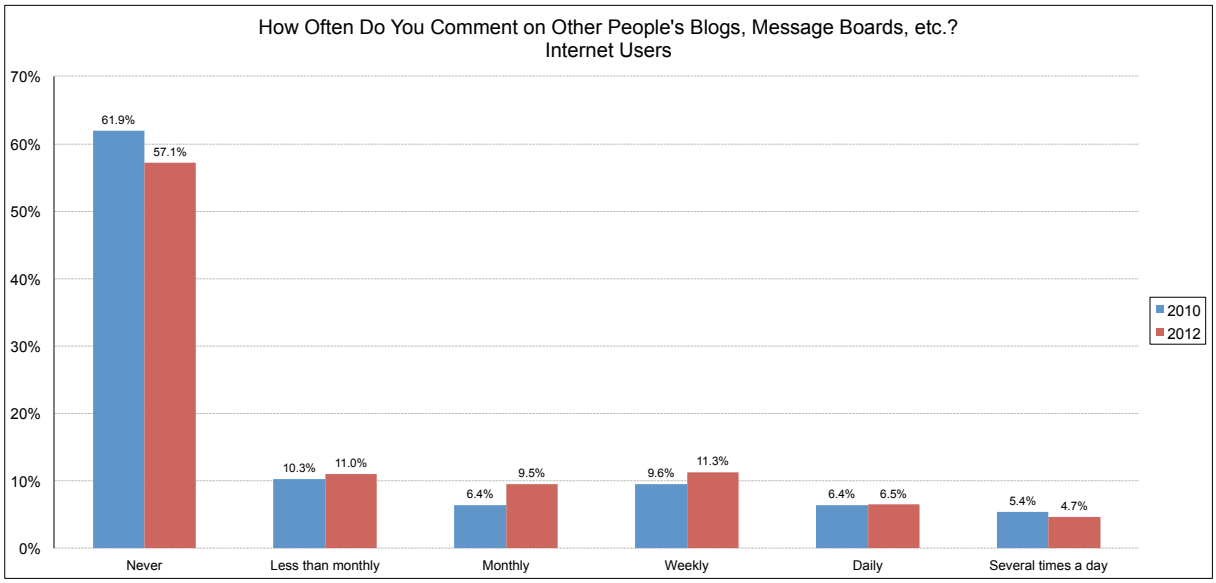

Figure 1.4.3.11. *Commenting on blogs and message boards*

1.4.4. Multitasking

Many Greek-Cypriots (41.6% in 2012) report that they multitask most of the time while online (Figure 1.4.4.1). Still, more than one in four users (27.6% in 2012) report never doing so.

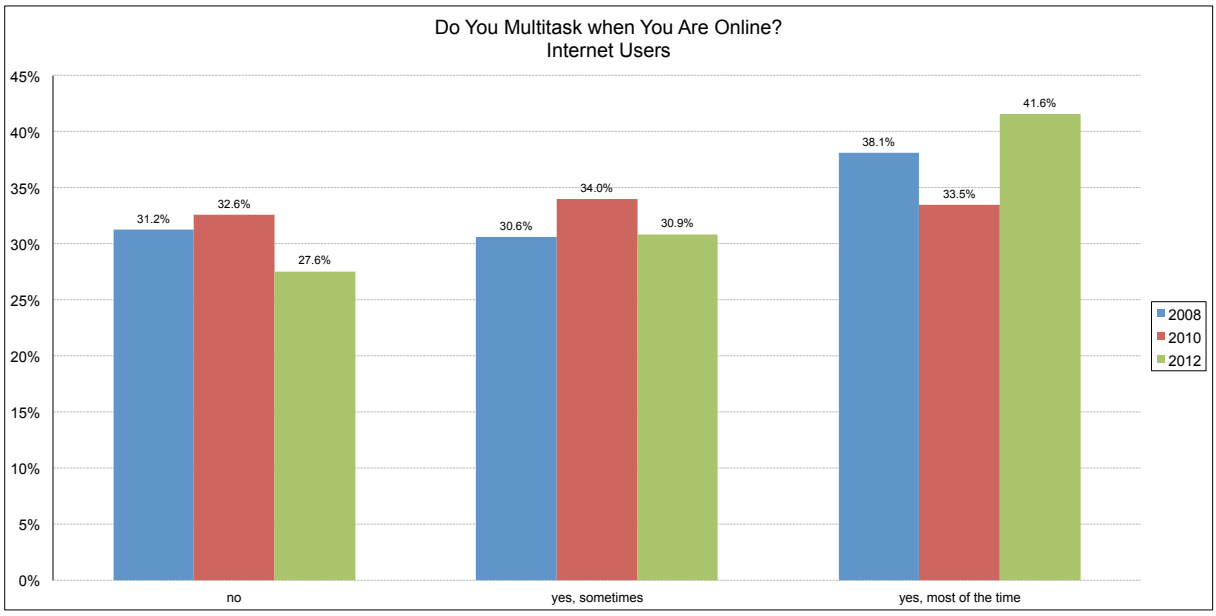

Figure 1.4.4.1. *Multitasking*

1.5. ONLINE ACTIVITIES

1.5.1. Information Related Online Activities

News is the most popular type of information sought on the internet (Figure 1.5.1.1). A dramatic increase in the percentage of users who look for news daily or several times a day can be clearly observed (from 31.0% of all users in 2010 to 61.8% in 2012).

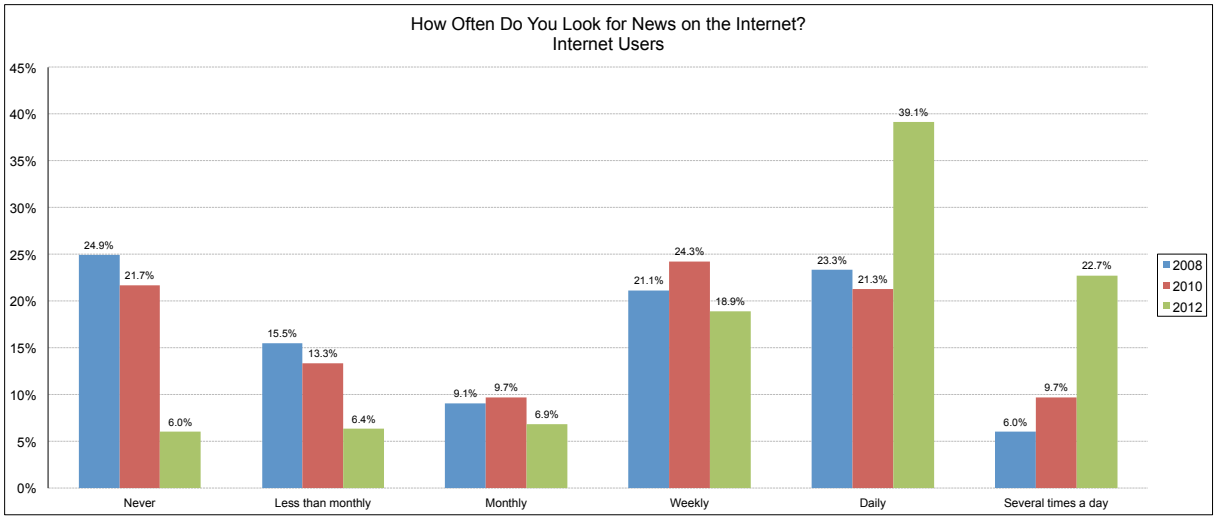

Figure 1.5.1.1. *Looking for news*

In Figure 1.5.1.2, an increase in the percentage of users who look for jobs daily or several times a day can also be observed (from 3.8% in 2010 to 18.0% in 2012). This is can be explained by the recently increasing unemployment rates due to the impact of the financial crisis in Cyprus.

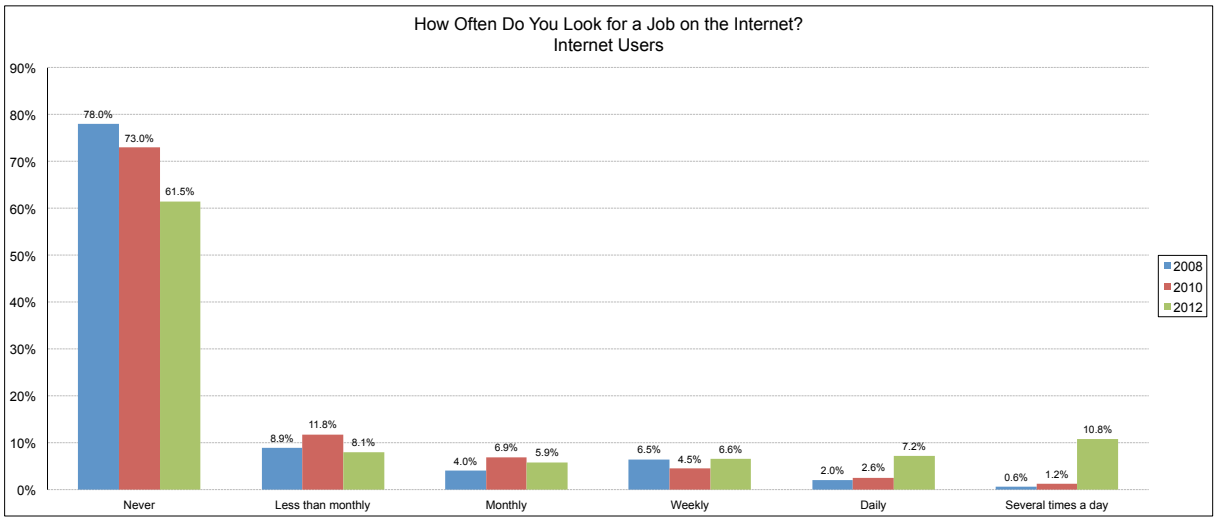

Figure 1.5.1.2. *Looking for a job*

Reading blogs (Figure 1.5.1.3) is also becoming more popular as weekly, daily and several times a day exposure to blog content have increased since 2010 by 10.4, 9.9 and 3.5 percentage points respectively.

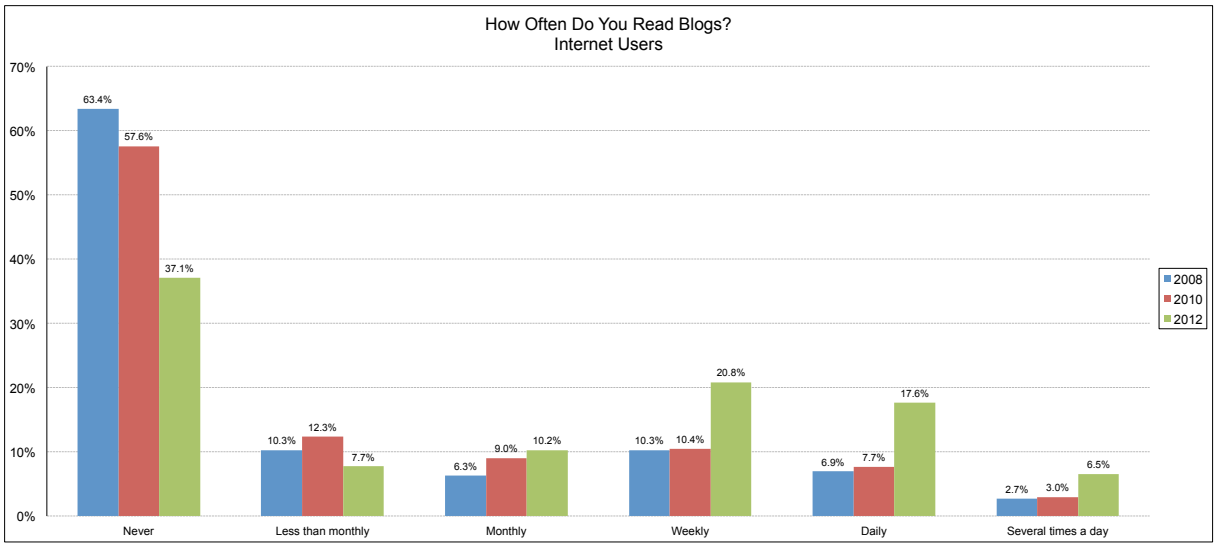

Figure 1.5.1.3. *Reading blogs*

An increase is also observed in the use of websites with humorous content: users who visit websites with humorous content every week or more often have increased from 23.0% in 2010 to 34.6% in 2012 (Figure 1.5.1.4).

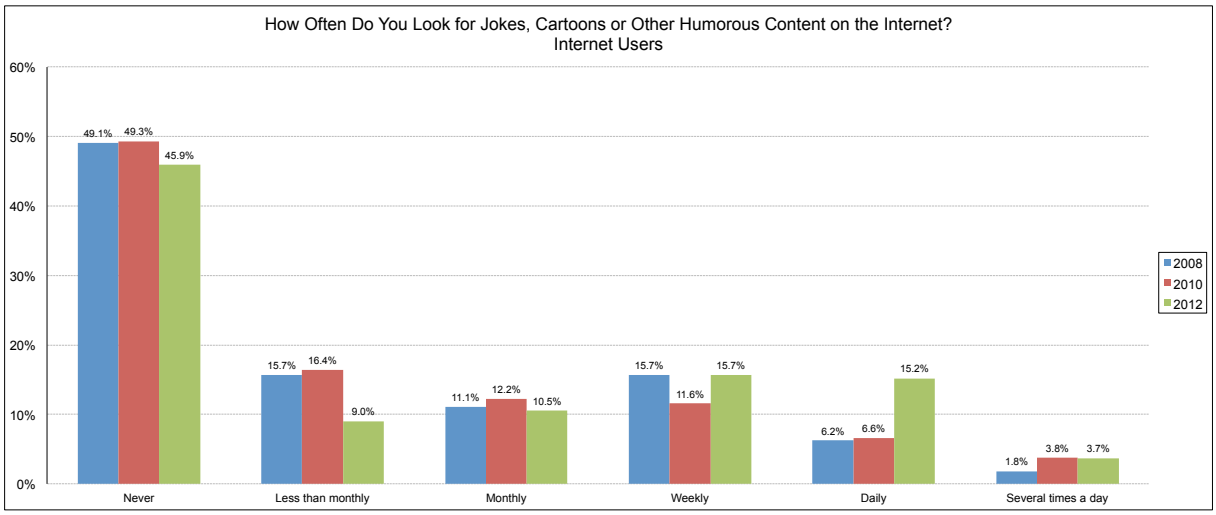

Figure 1.5.1.4. *Looking for humorous content*

No notable changes were observed with respect to searching for travel information (Figure 1.5.1.5).

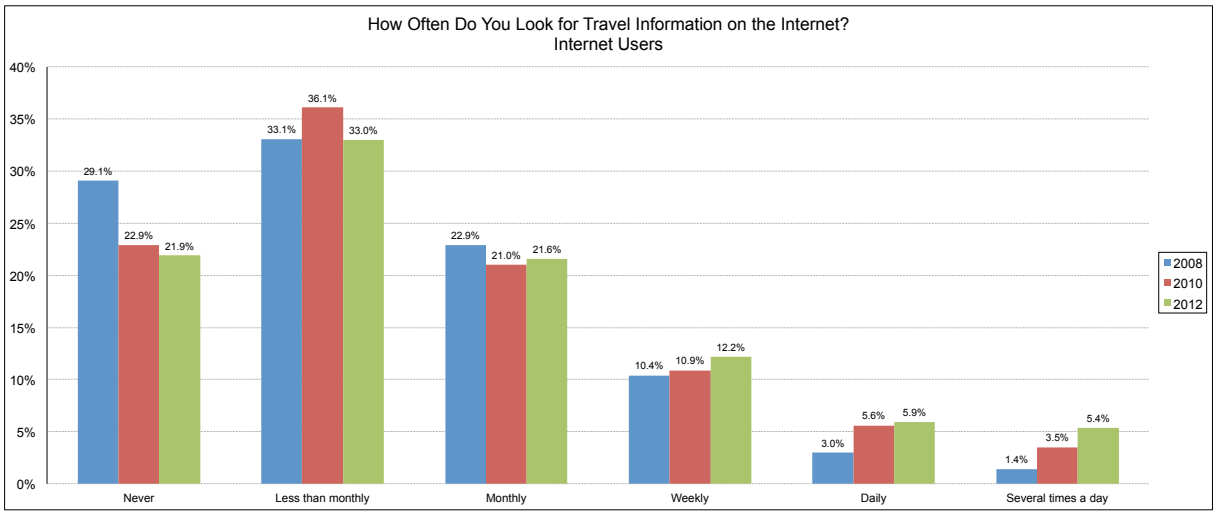

Figure 1.5.1.5. *Looking for travel information*

An increase is also observed regarding the frequency of health related information searches, as more users search for health related information once a month or more often (Figure 1.5.1.6).

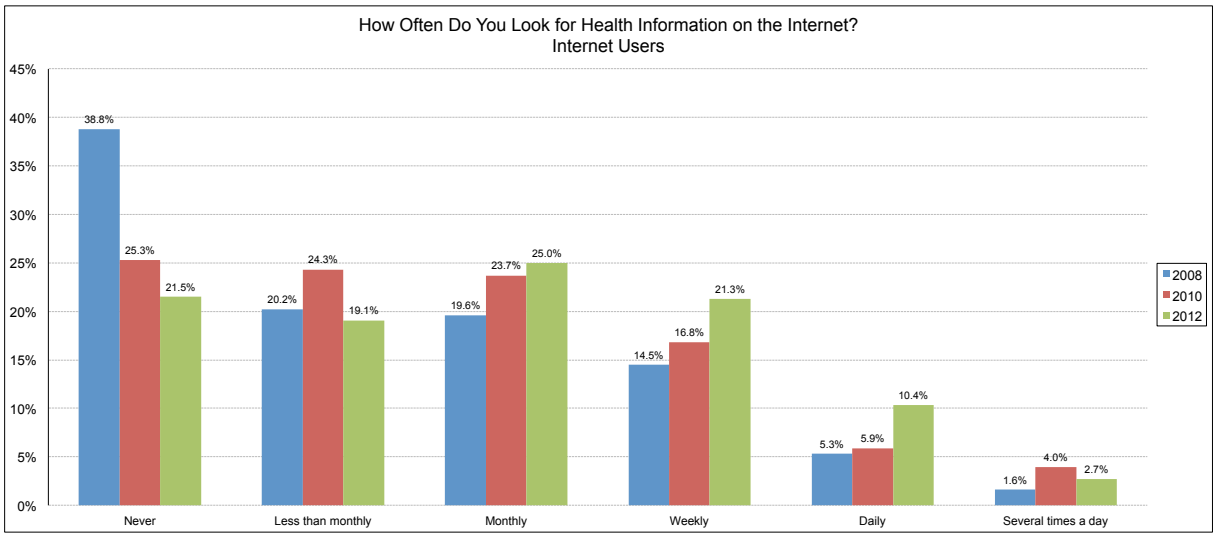

Figure 1.5.1.6. *Looking for health information*

As demonstrated in Figure 1.5.1.7, getting information about a product is another online activity gaining popularity among Greek-Cypriots.

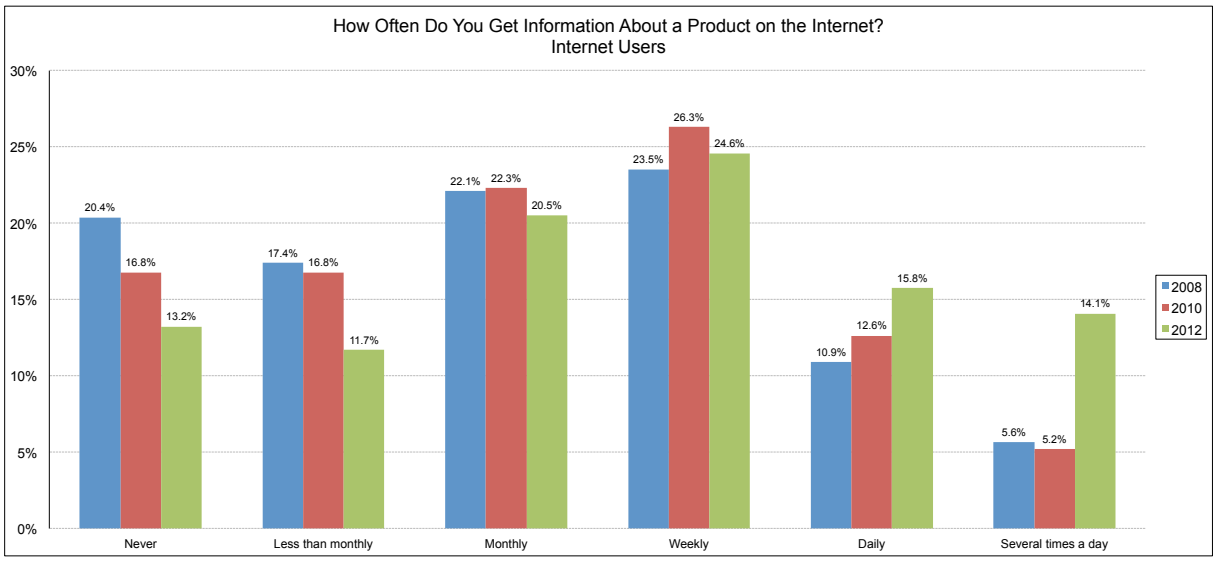

Figure 1.5.1.7. *Getting information about a product*

1.5.2. Online Transactions

Reasonably, as getting information about a product becomes more popular, so does buying things online (Figure 1.5.2.1).

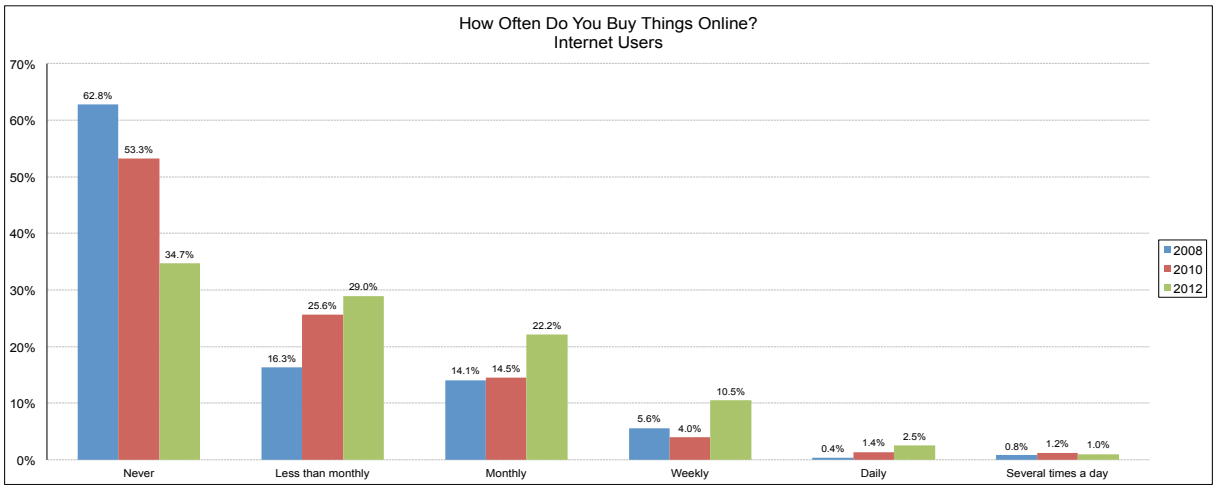

Figure 1.5.2.1. *Buying online*

In 2012, 7.5% of Greek-Cypriot users of the internet paid bills online weekly or more often, compared to 3.6% in 2010 (Figure 1.5.2.2).

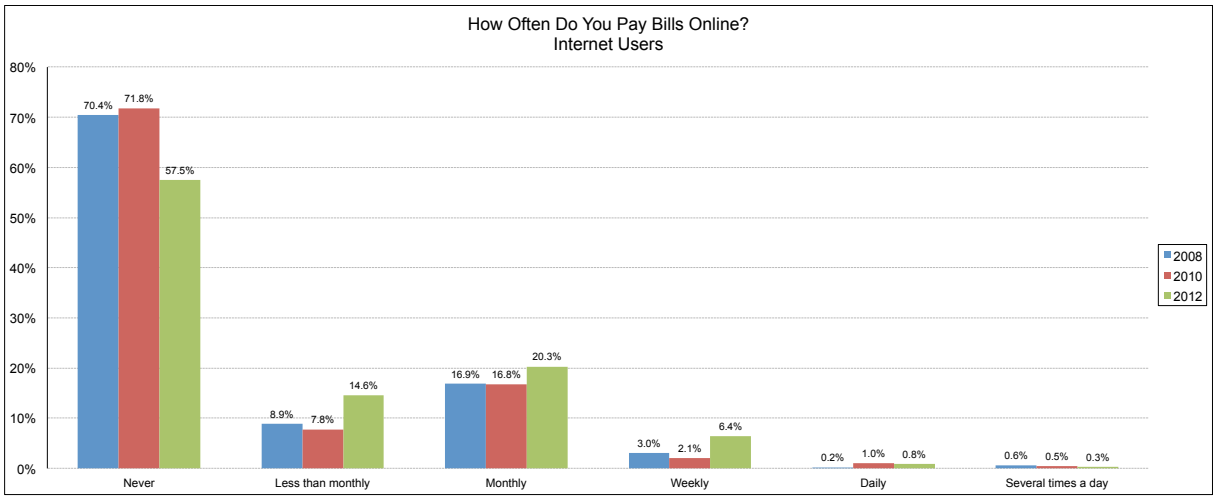

Figure 1.5.2.2. *Paying bills*

Figure 1.5.2.3 shows that doing online banking at least once a week has also increased in prevalence since 2010 (33.6% of users in 2012 compared to 19.9% in 2010).

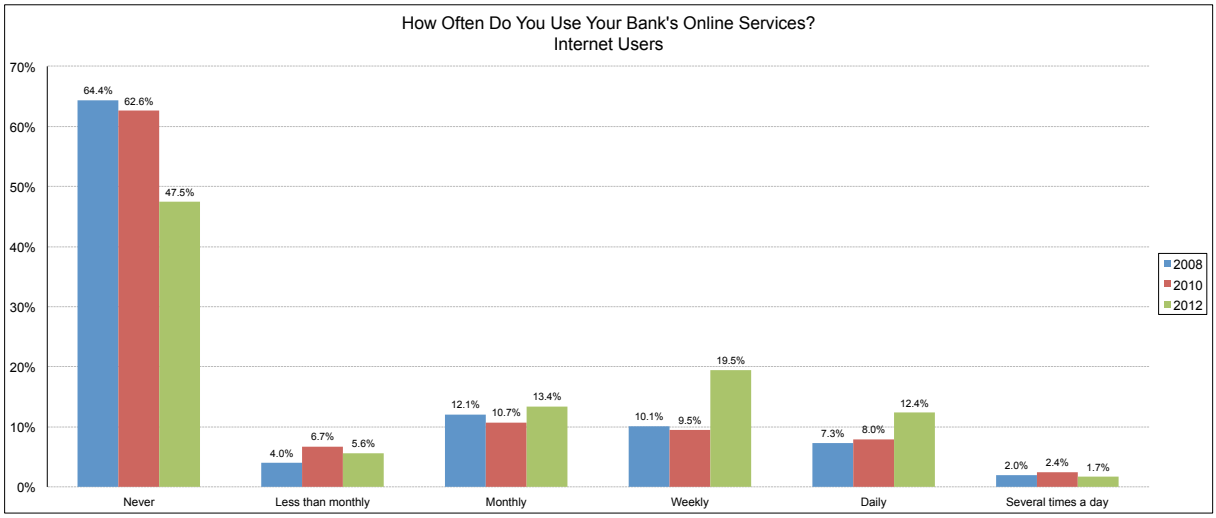

Figure 1.5.2.3. *Online banking*

Only a small percentage of Greek-Cypriot internet users buy bonds or stocks online (Figure 1.5.2.4).

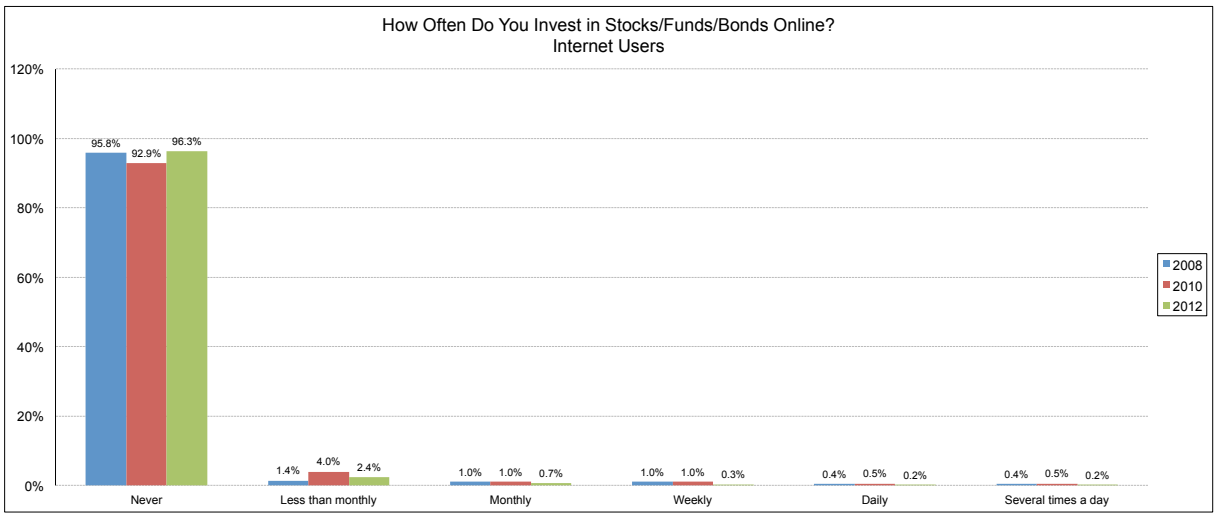

Figure 1.5.2.4. *Investing online*

An increase is observed in online travel bookings, although, as it would be expected, the majority of internet users (52.3%) do make travel arrangements, but less frequently than once a month (Figure 1.5.2.5).

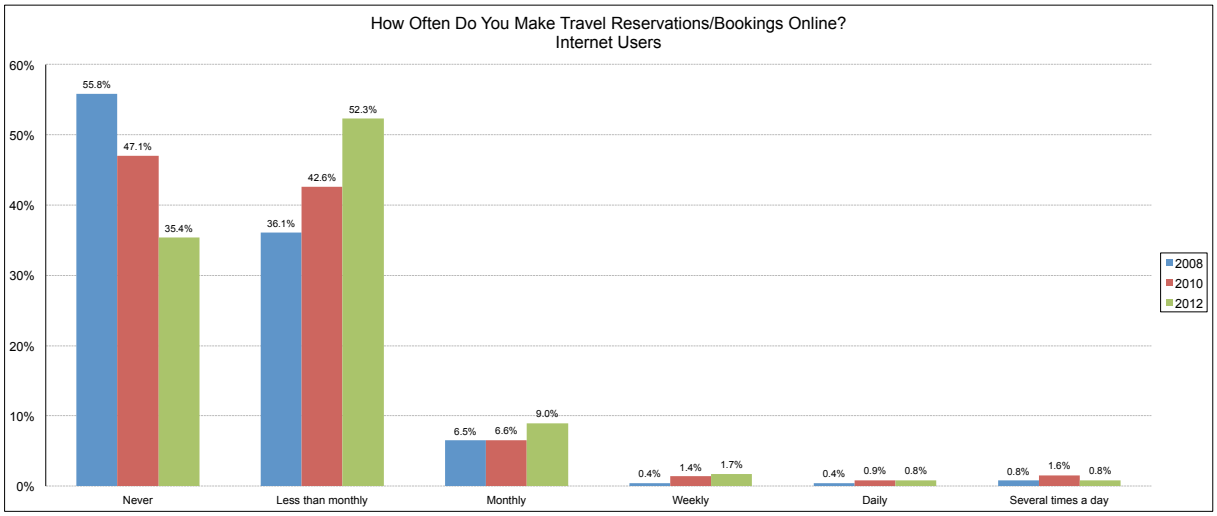

Figure 1.5.2.5. *Making travel arrangements*

1.5.3. Security Concerns

Greek-Cypriot users report a growing concern about online transactions. This is apparent by the fact that the percentage of users who do not feel concerned at all about the security of their credit cards has dropped by almost 11 points (14.8% in 2012 from 25.5% in 2010). On the other hand, the percentages of Greek-Cypriot users who are somewhat, very or extremely concerned have increased by about 5, 15 and 7 points respectively (Figure 1.5.3.1).

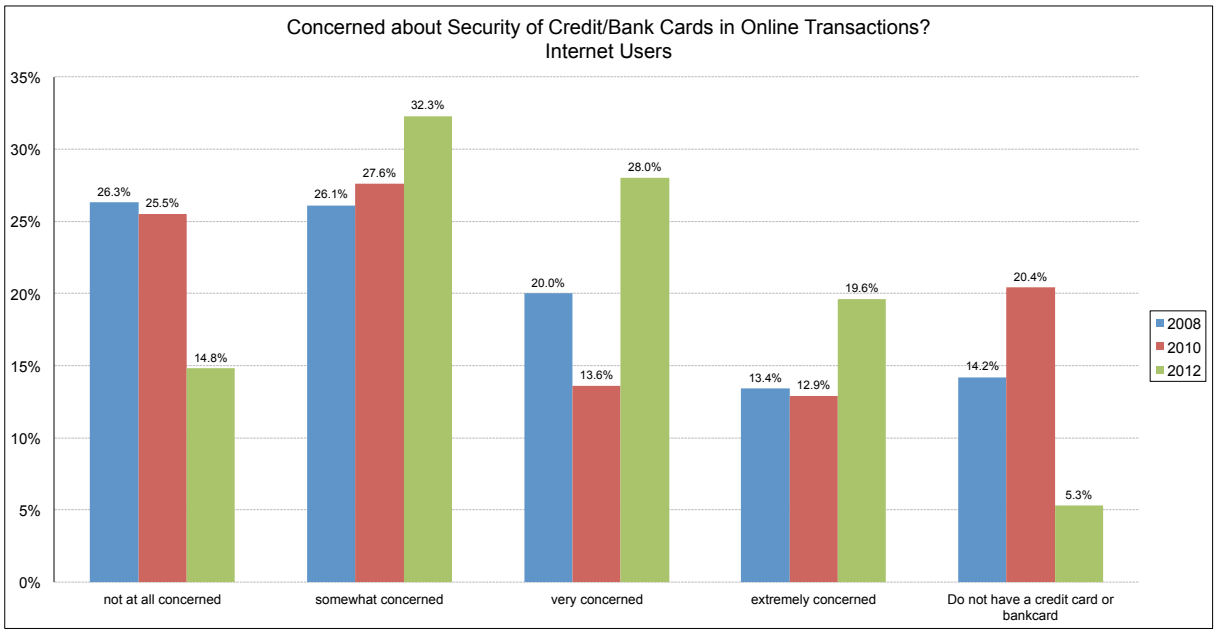

Figure 1.5.3.1. *Concerns about security of online transactions*

1.5.4. Online Entertainment

With respect to internet use for entertainment, web browsing (Figure 1.5.4.7) is by far the most popular activity whereas visiting religious websites (Figure 1.5.4.4), gambling (Figure 1.5.4.6) and viewing websites with sexual content (Figure 1.5.4.8) are the least popular (the latter could be misleading as some users may feel uncomfortable to disclose this information). The results show that the percentages of Greek-Cypriots users who use the internet for multimedia content, such as downloading music (Figure 1.5.4.2) and videos (Figure 1.5.4.3), listening to online radio stations (Figure 1.5.4.5) and visiting social networking and video-sharing websites (Figure 1.5.4.9) is increasing. On the other hand, the percentage of users who play video games online (Figure 1.5.4.1) seems to have decreased.

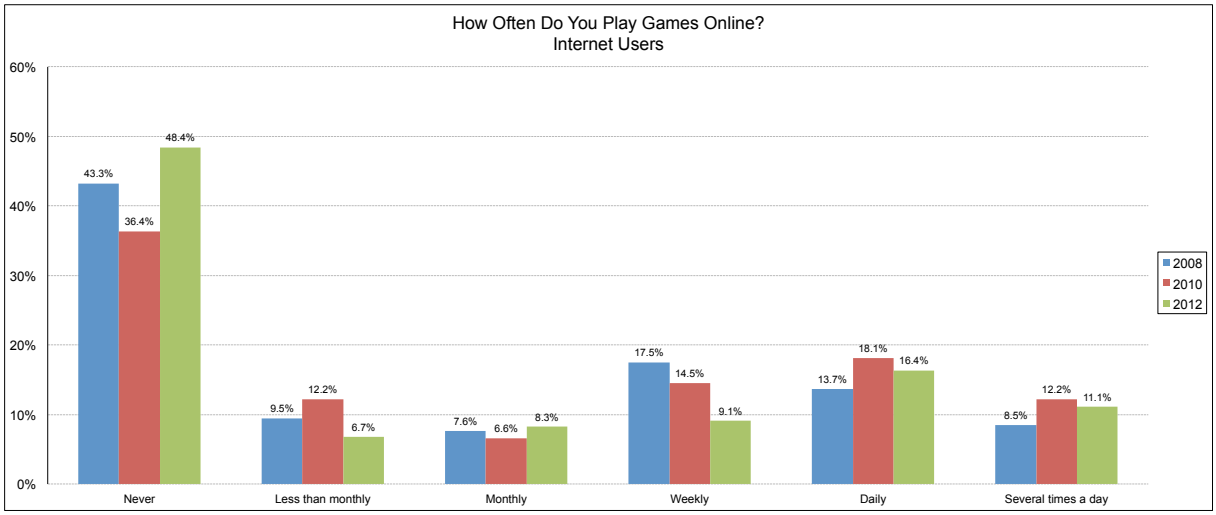

Figure 1.5.4.1. *Playing games*

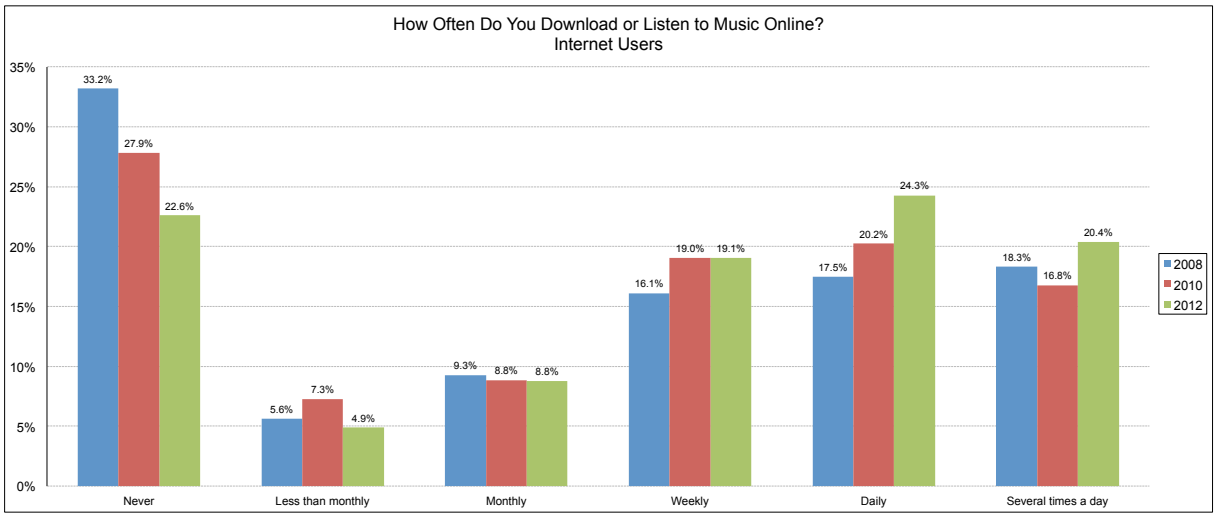

Figure 1.5.4.2. *Online music*

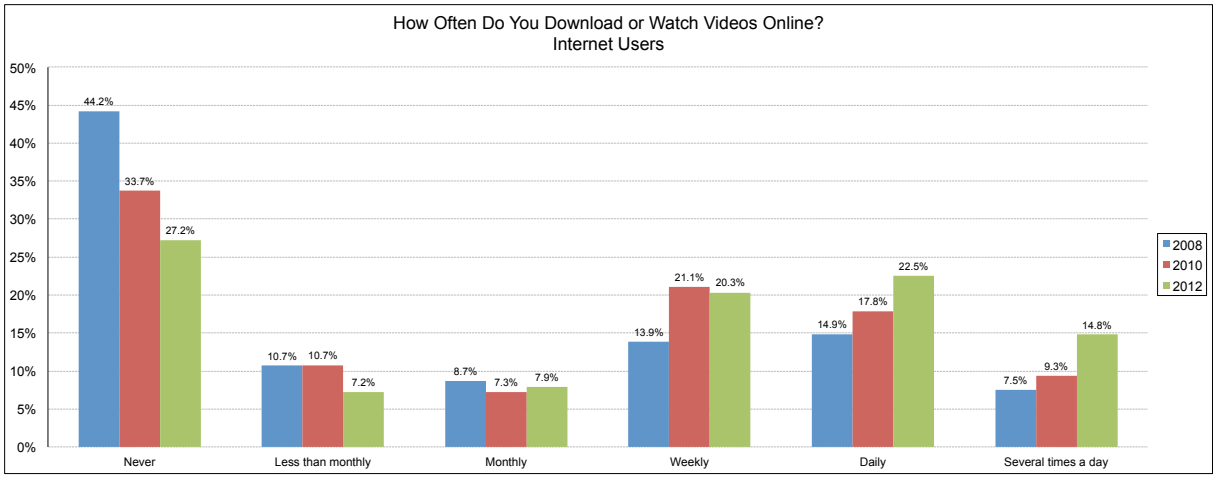

Figure 1.5.4.3. *Online videos*

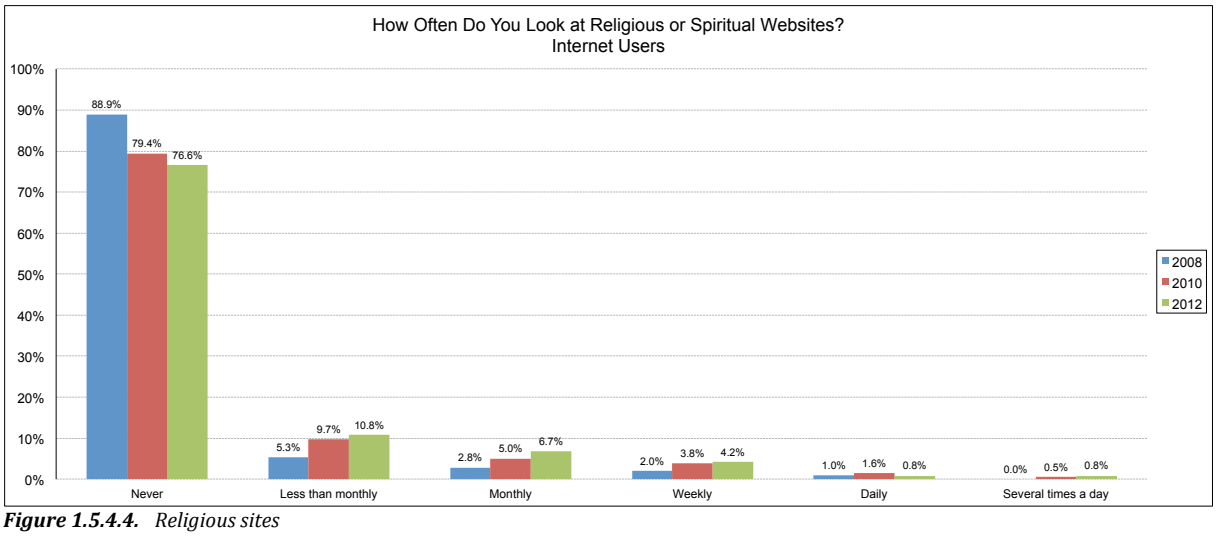

Figure 1.5.4.4. *Religious sites*

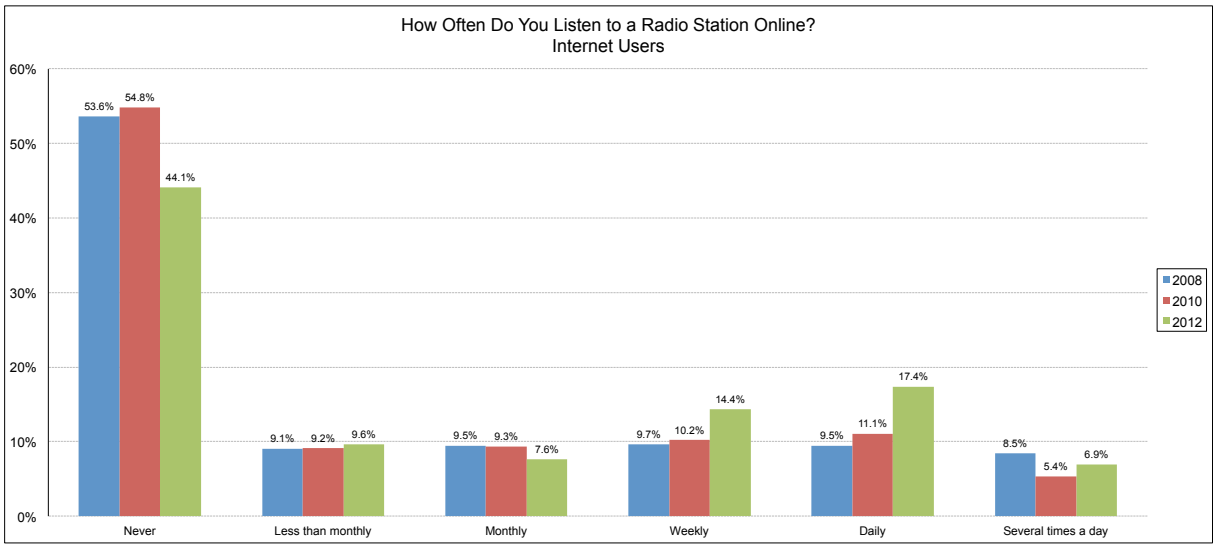

Figure 1.5.4.5. *Online radio*

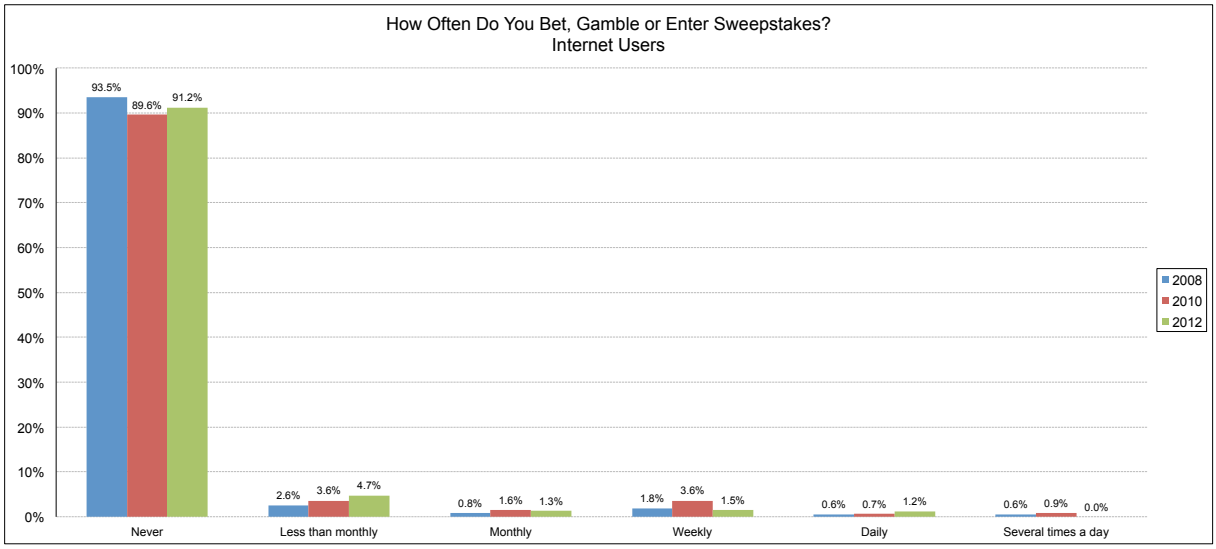

Figure 1.5.4.6. *Betting and gambling online*

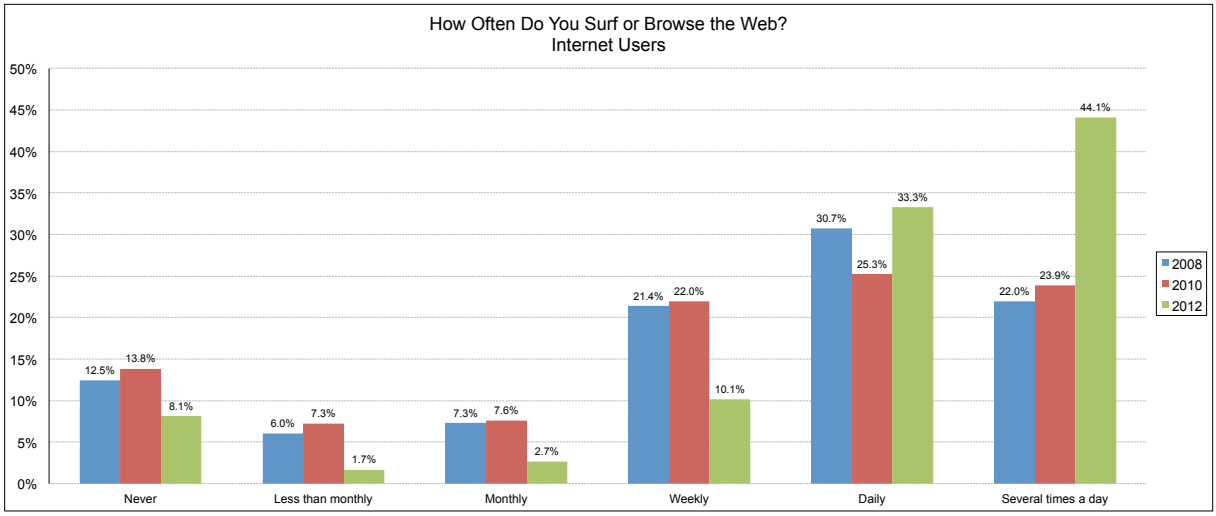

Figure 1.5.4.7. *Surfing the web*

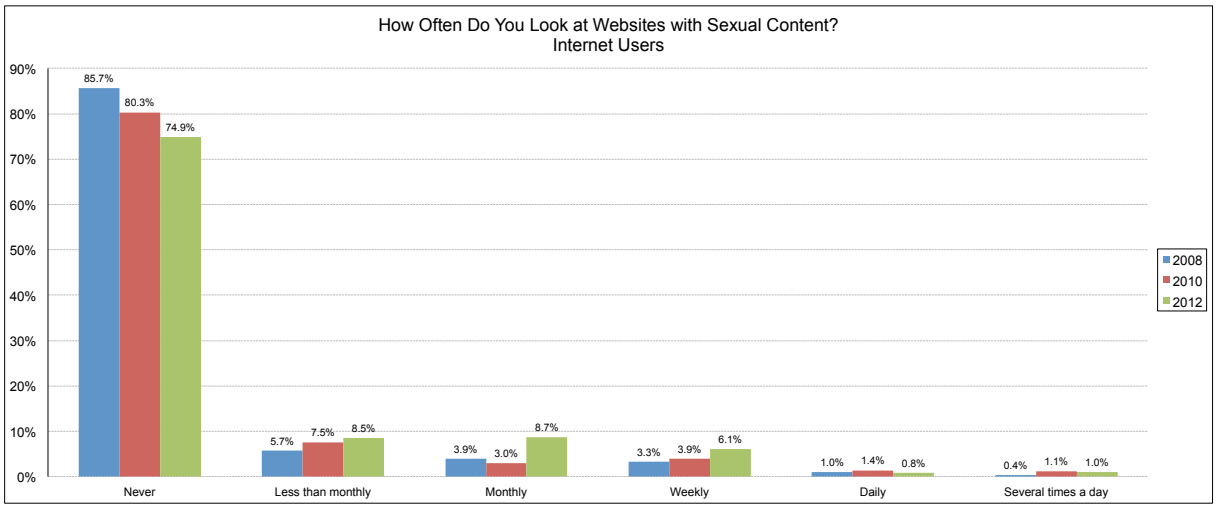

Figure 1.5.4.8. *Online sexual content*

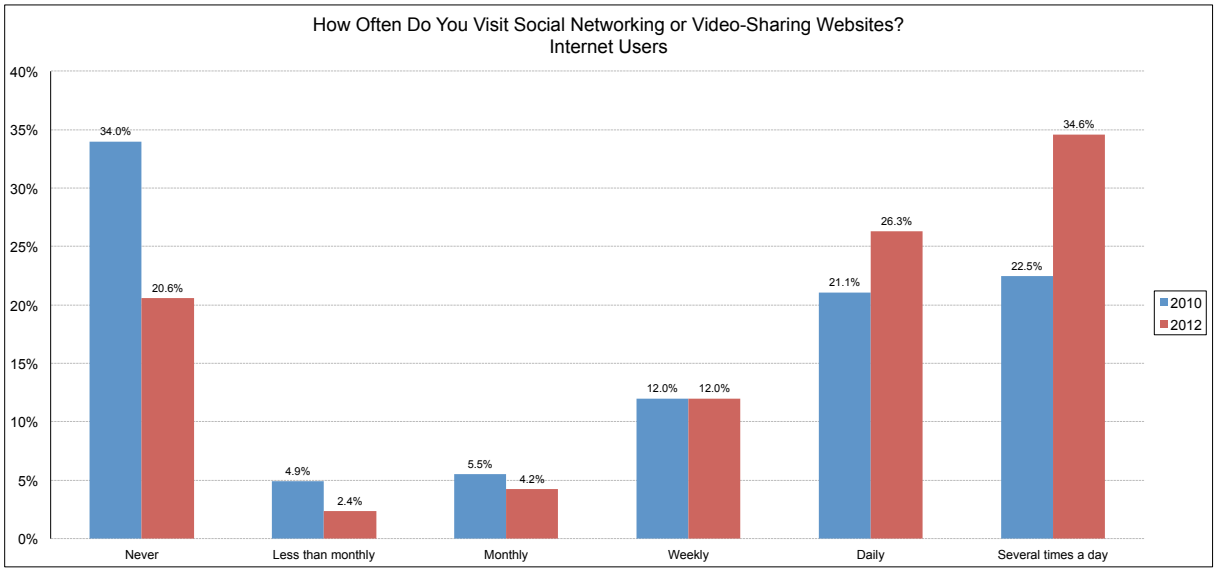

Figure 1.5.4.9. *Social networking sites*

1.5.5. Online Learning

Greek-Cypriot users are becoming more familiar with using online resources for seeking definitions of words (Figure 1.5.5.1) and for fact checking (Figure 1.5.5.2), while they report much less frequent use of the internet for retrieving information for school (Figure 1.5.5.3) and for studying or training online (Figure 1.5.5.4).

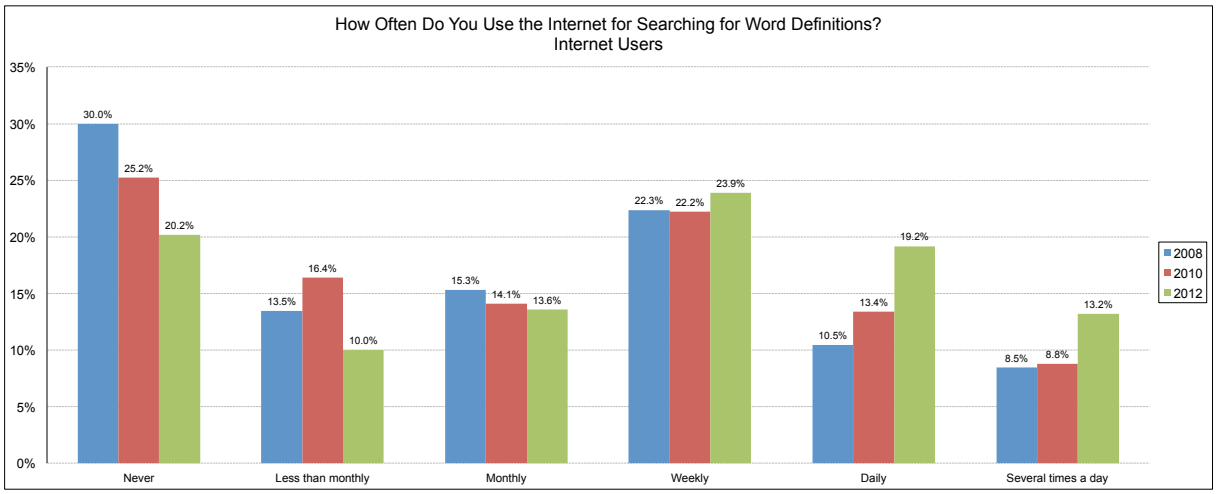

Figure 1.5.5.1. *Online learning - word definitions*

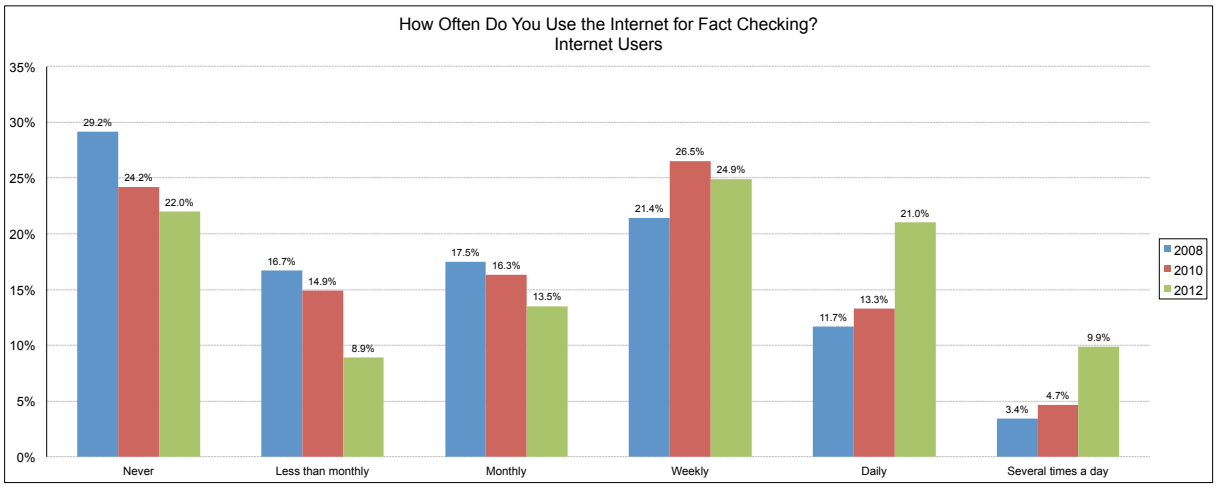

Figure 1.5.5.2. *Online learning – fact checking*

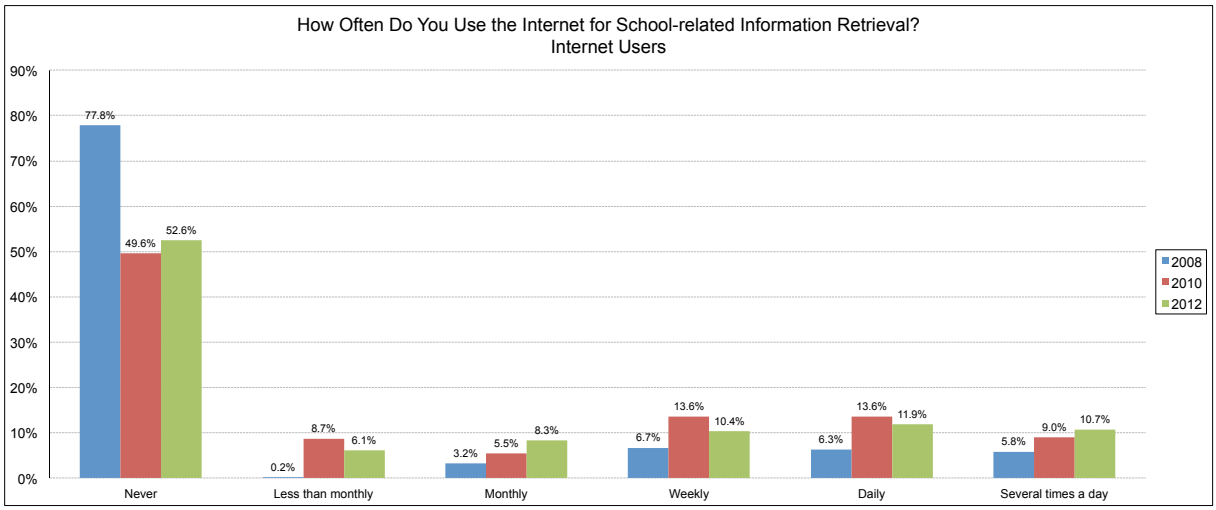

Figure 1.5.5.3. *Online learning - school related information*

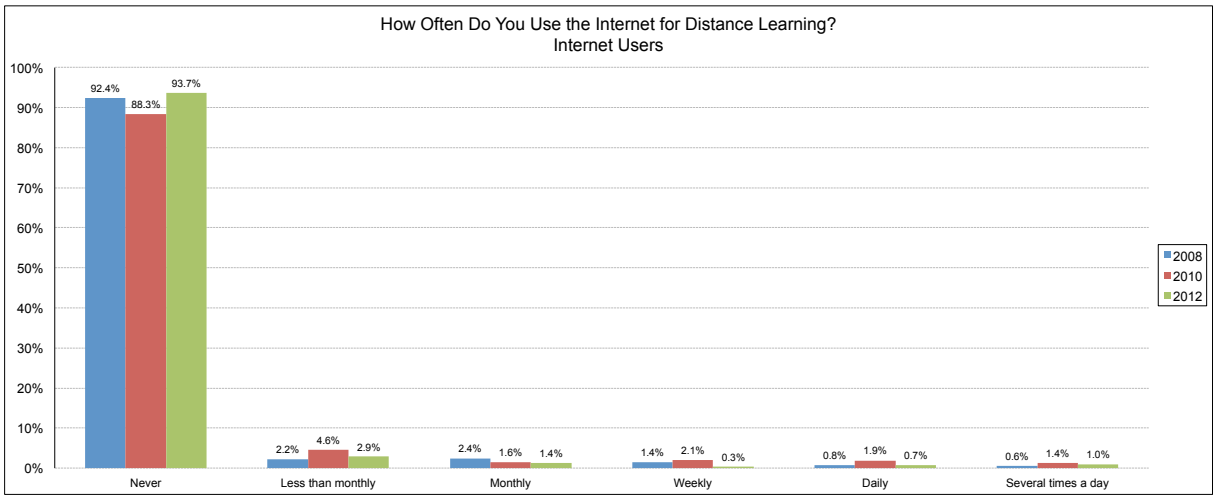

Figure 1.5.5.4. *Online learning - distance learning*

1.6. PERCEPTIONS ABOUT SOCIAL AND POLITICAL LIFE

1.6.1. Political Efficacy

When asked about their political preferences, most respondents (27.5%) placed themselves in the middle of the political spectrum on the "left-right" axis (Figure 1.6.1.1). A significant percentage (25.2%) does not accept the "left-right" distinction.

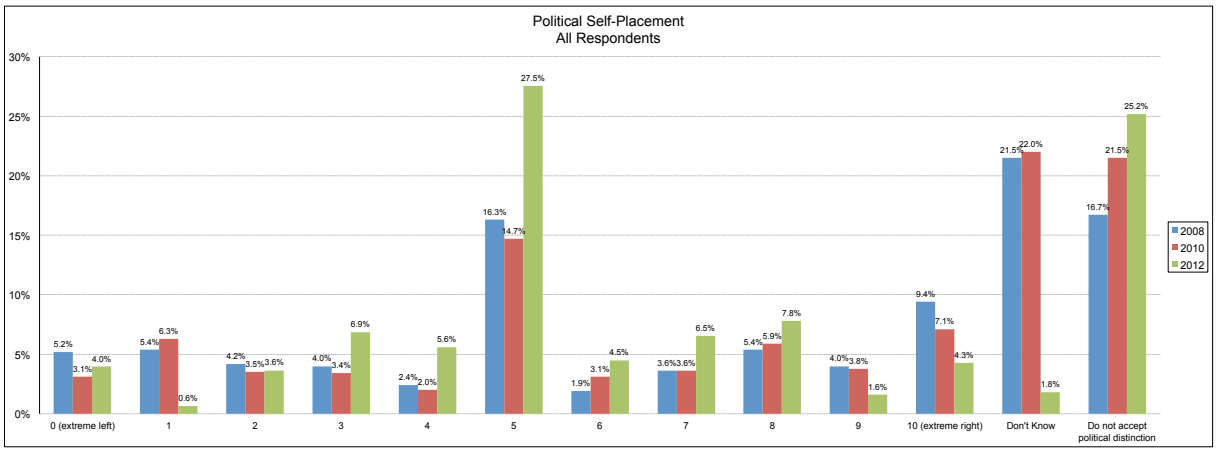

Figure 1.6.1.1. *Political self-placement on the left-right axis*

A remarkable increase is found in perceptions of political efficacy due to internet use. The percentage of those who disagreed or strongly disagreed with the idea that the internet can increase personal influence in politics has dropped from 68.9% in 2010 to 35.6% in 2012 (Figure 1.6.1.2). At the same time, the percentage of respondents who agreed or strongly agreed increased from 21.9% in 2010 to 42.7% in 2012.

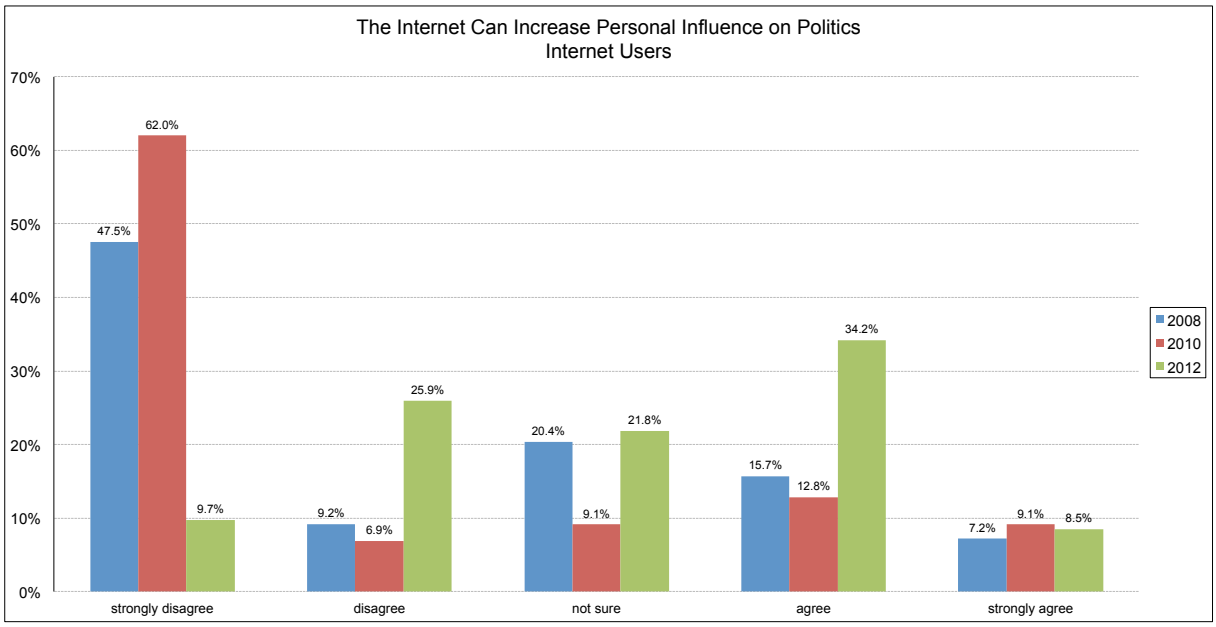

Figure 1.6.1.2. *Increase of personal political power*

Similarly, the percentage of respondents who doubt (disagree or strongly disagree) that the use of the internet can increase one's personal impact on governmental decisions and actions has also dropped, from 73.6% in 2010 to 45.5% in 2012 (Figure 1.6.1.3).

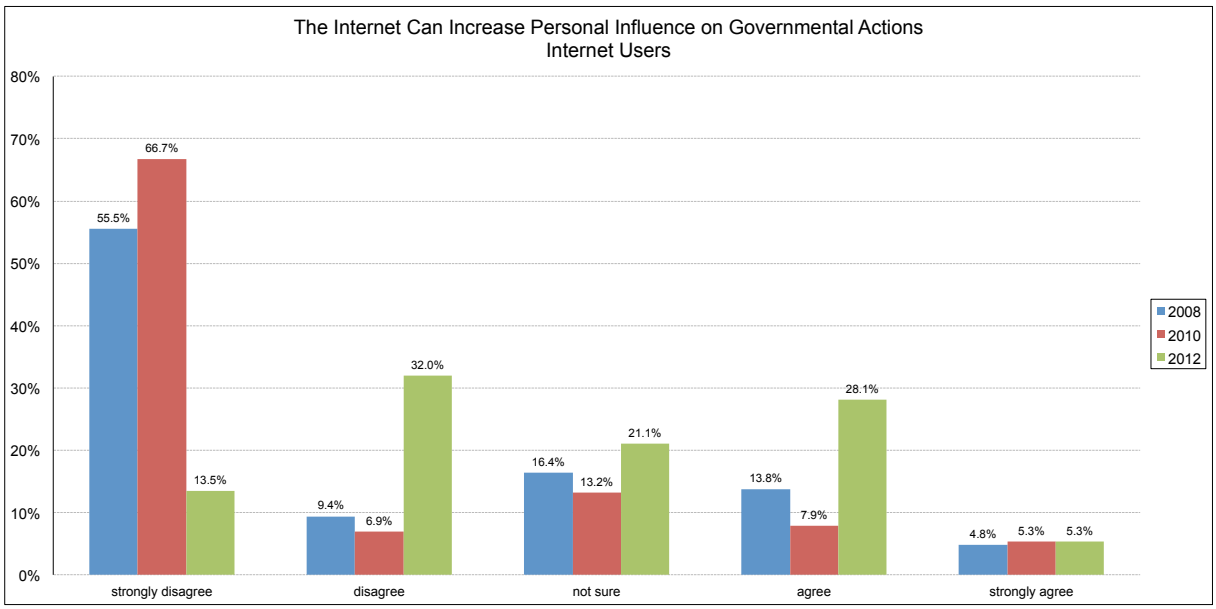

Figure 1.6.1.3. *Increase of personal influence on governmental actions*

The percentage of respondents who believe that the internet can increase public officials' interest about what people think has also increased (Figure 1.6.1.4), although the majority (62.5%) remain skeptical (disagree or strongly disagree).

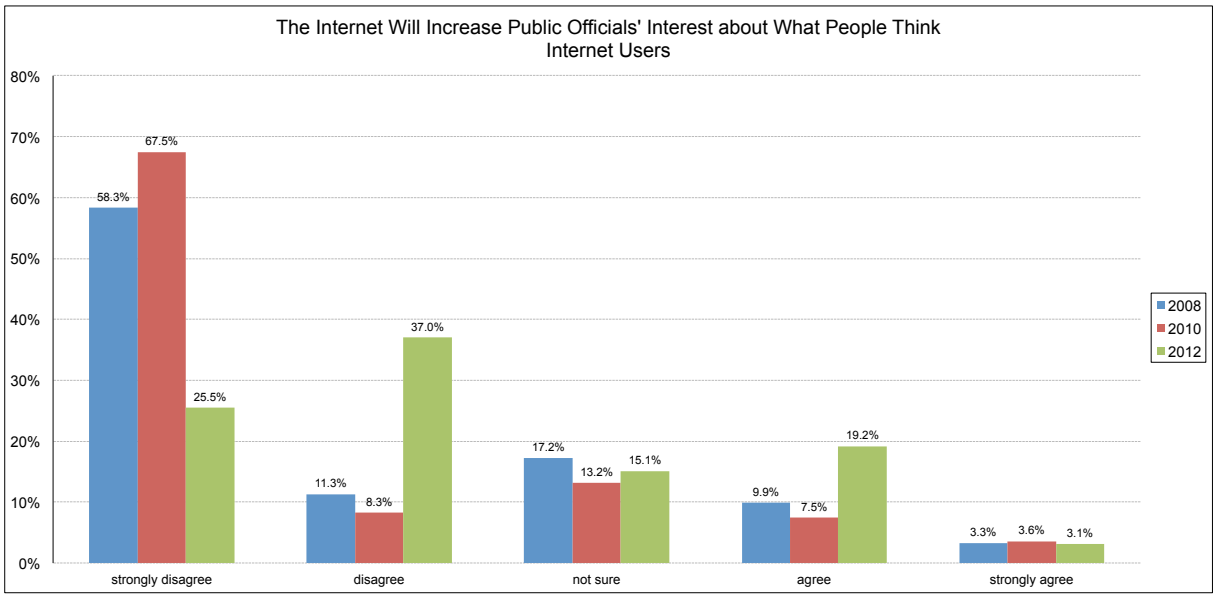

Figure 1.6.1.4. *Increase of officials' interest in what people think*

Additionally, compared to 2008 and 2010, more Greek-Cypriot internet users positively evaluate the internet's potential contribution in understanding politics (Figure 1.6.1.5).

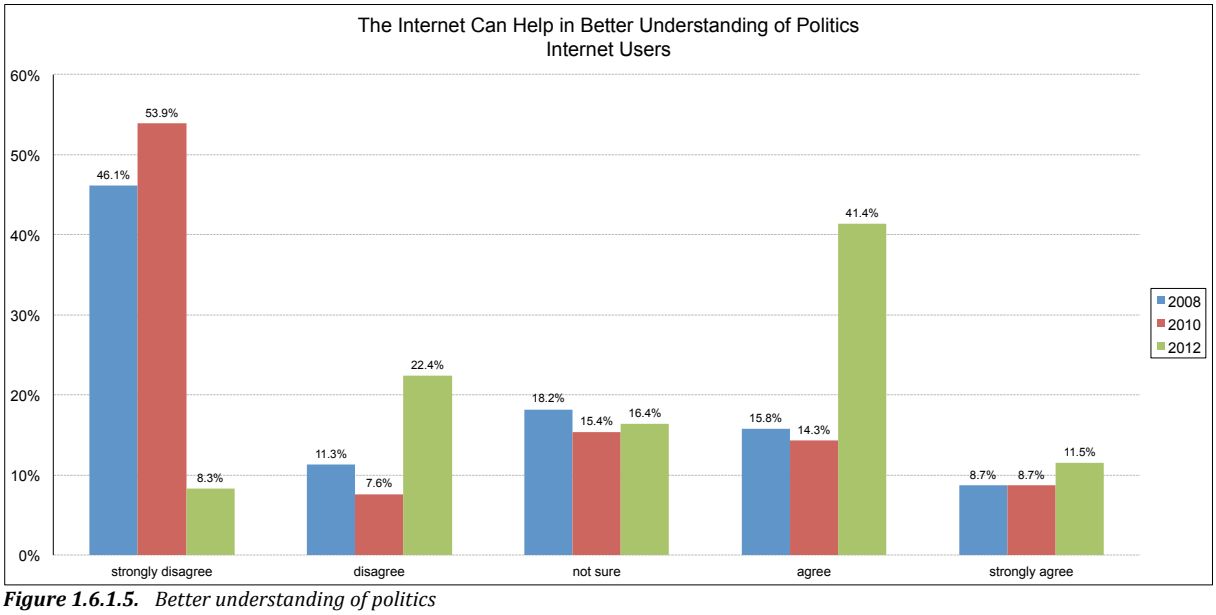

Figure 1.6.1.5. *Better understanding of politics*

As far as the importance of the internet during pre-election campaigns is concerned (Figure 1.6.1.6), the percentage of respondents who agree or strongly agree that the internet has acquired importance has increased from 58.8% to 71.1% since 2008 (the item was omitted in the 2010 questionnaire). However, this could be a result of the on-going pre-election campaign at the time of the survey.

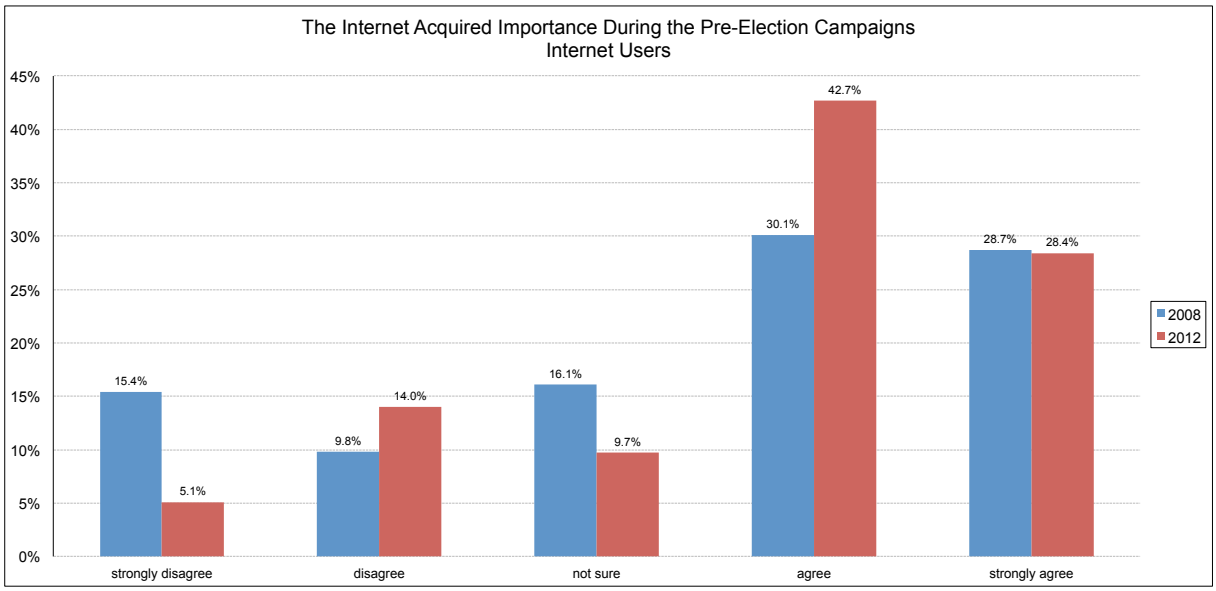

Figure 1.6.1.6. *Importance of the internet during pre-election campaigns.*

1.6.2. Social Trust

WIP Cyprus 2012 also included a series of questions that were not used in 2008 and 2010. These questions aimed at recording the levels of trust of respondents towards other people. Overall, Greek-Cypriots appear cautious towards other people. As it is shown in Figure 1.6.2.1, the majority believes that most people cannot be trusted, with an astonishing 22.8% placing themselves at point 0 of the 0-10 scale of trust. The proportion of participants who place themselves on the more "trust" grades is much smaller, while 24.6% is loaded on the perceived middle point of the scale. A similar pattern can be seen in Figures 1.6.2.2 and 1.6.2.3 regarding our respondents' beliefs on whether other people will try to take advantage of them if they get the chance and whether other people will try to help them if they need help.

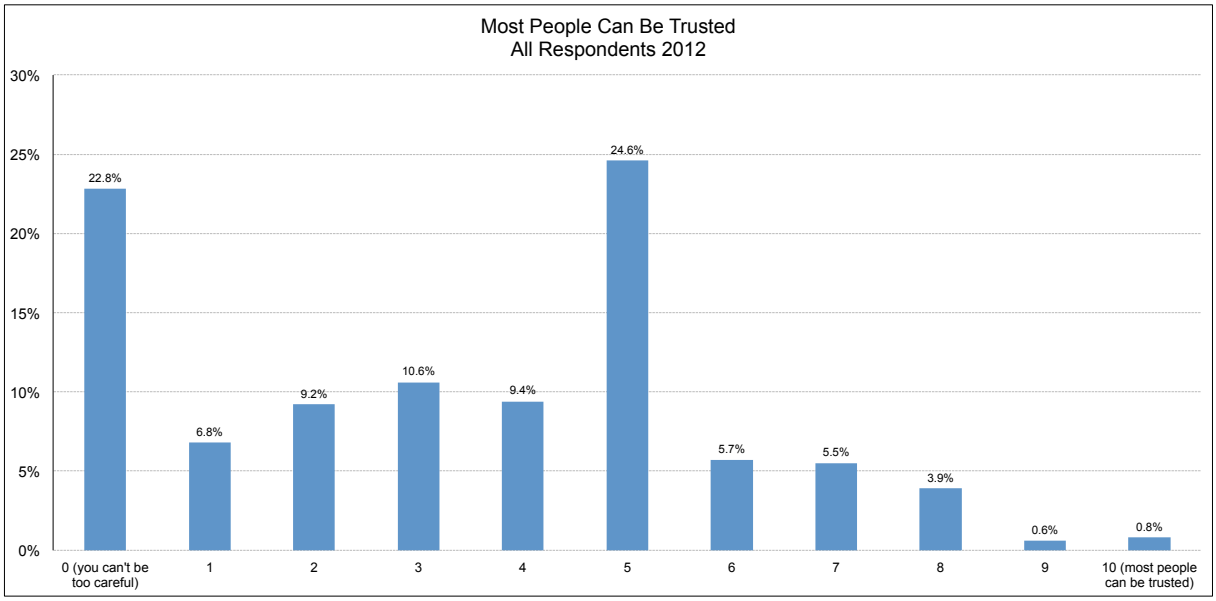

Figure 1.6.2.1. ***Figure*** *Most people can be trusted*

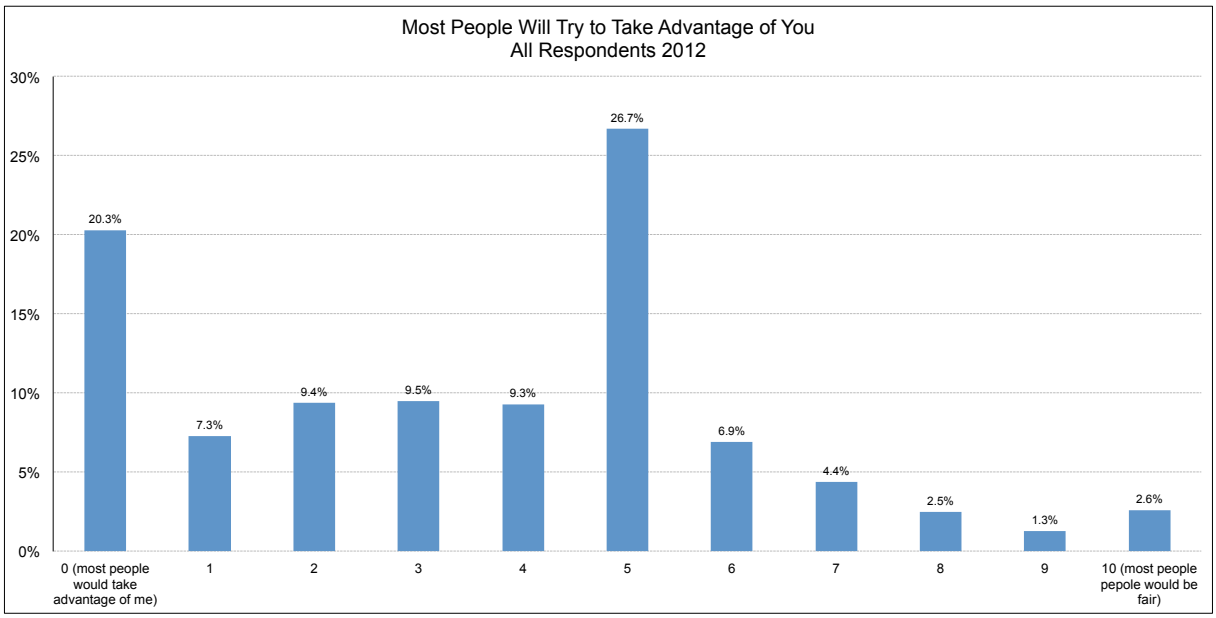

Figure 1.6.2.2. *Most people will try to take advantage of you*

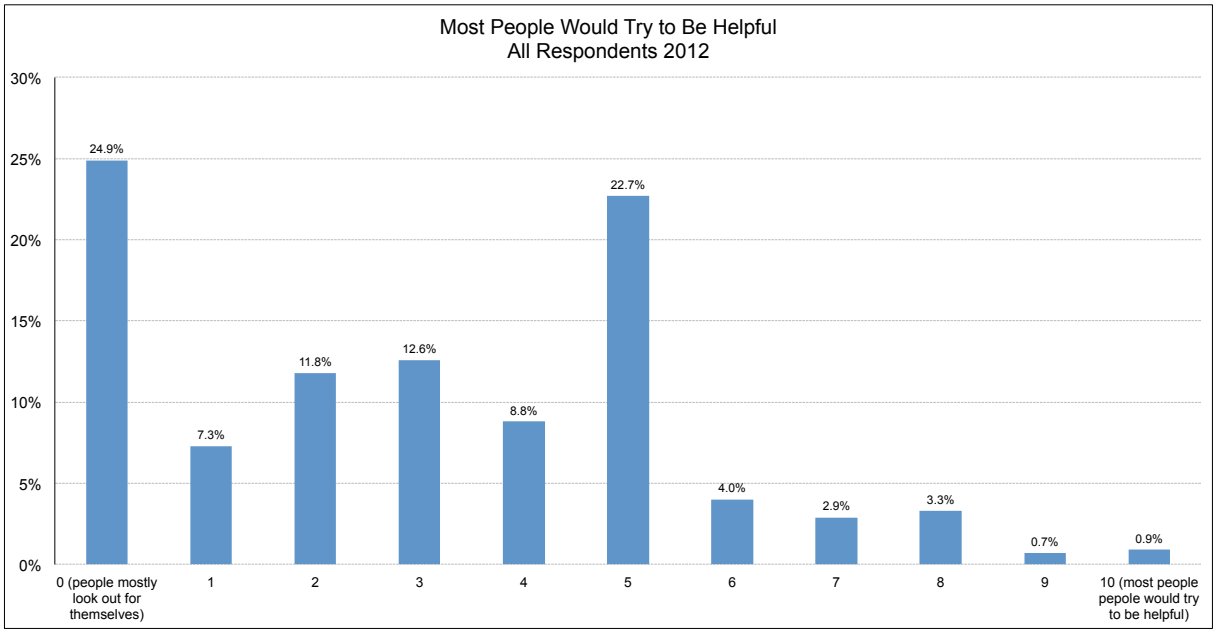

Figure 1.6.2.3. *Most people will try to be helpful*

1.7. FREEDOM OF EXPRESSION AND SURVEILLANCE

1.7.1. Freedom of Expression

The percentage of Greek-Cypriot respondents who said that they are comfortable in expressing their political opinions on the internet increased from 46.0% in 2010 to 70.0% in 2012 (Figure 1.7.1.1).

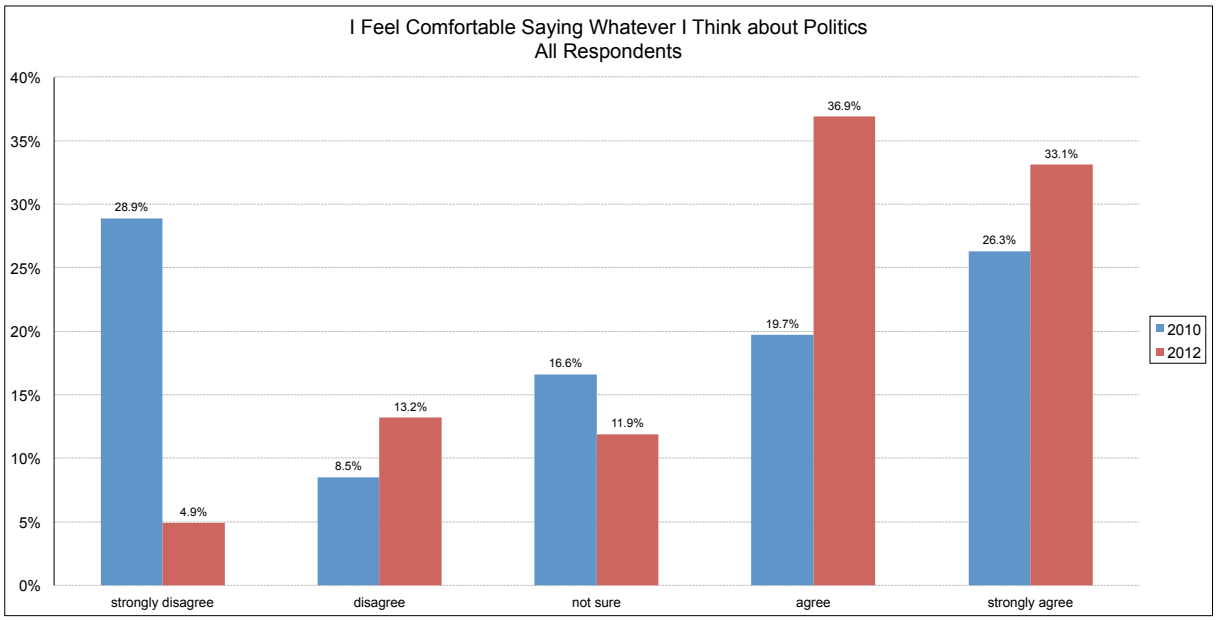

Figure 1.7.1.1. *Freedom of expression on political issues*

Also, compared to 2010, a greater proportion of Greek-Cypriots feels it is safe to freely express one's political views on the internet, although the majority still does not feel so (Figure 1.7.1.2).

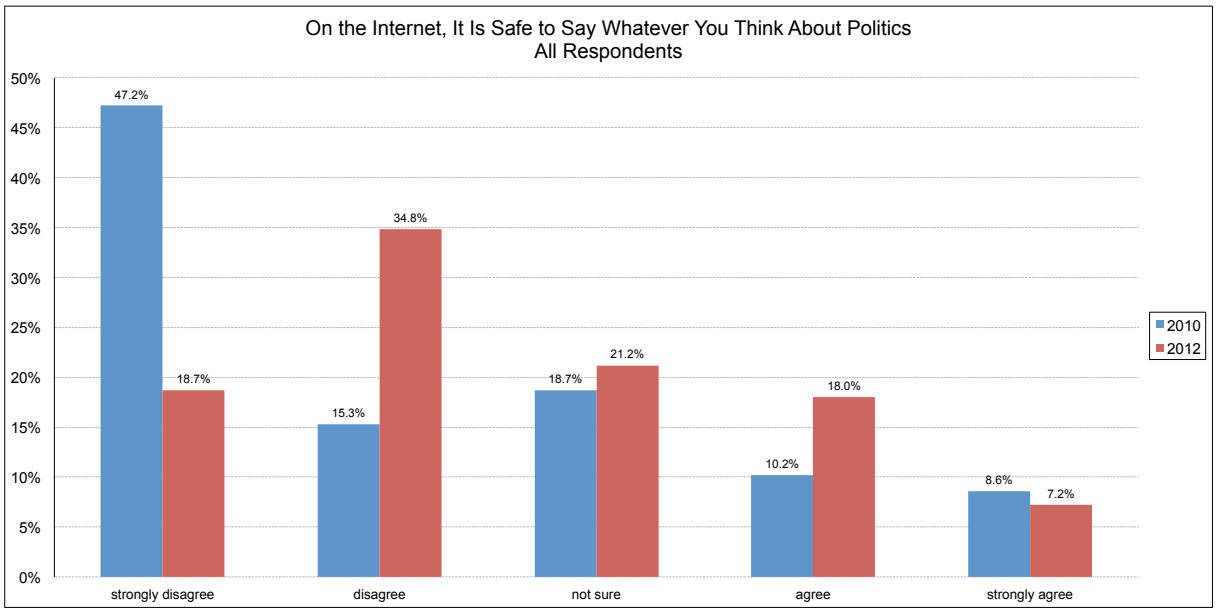

Figure 1.7.1.2. *Political expression online*

An overwhelming majority of Greek-Cypriot respondents (59.9% in 2010 and 77.2% in 2012) is in favor of the freedom to criticize the government online (Figure 1.7.1.3). Accordingly, the percentage of those who are not in favor of free online criticism of the government dropped from 23.4% in 2010 to 13.4% in 2012.

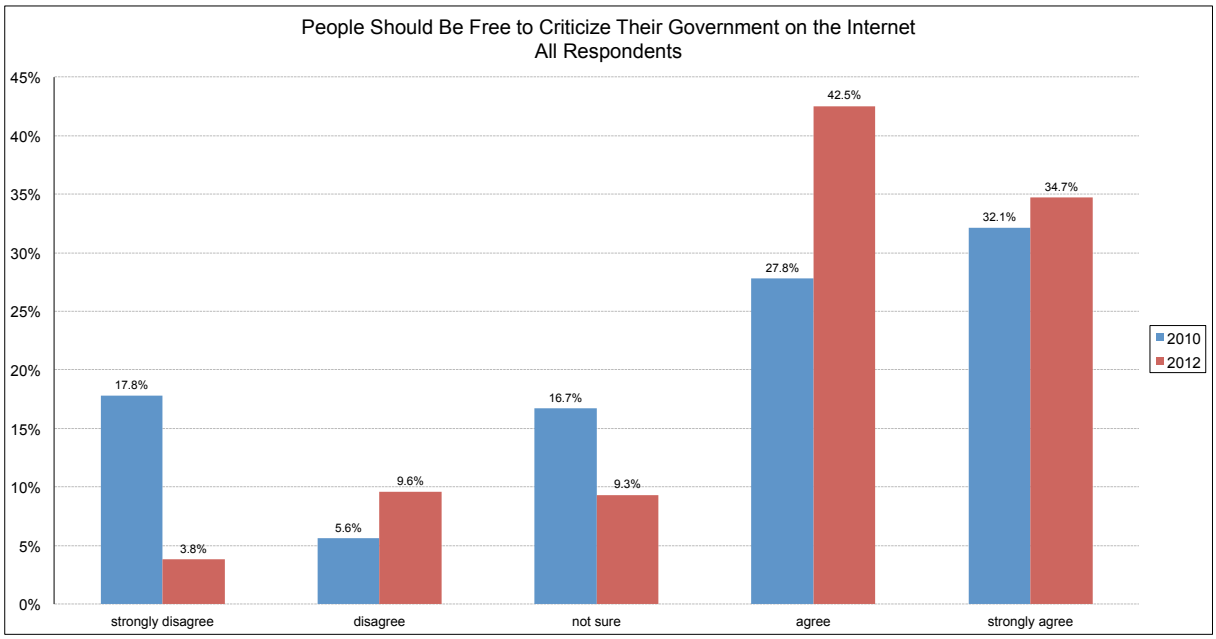

Figure 1.7.1.3. *Criticizing government online*

The majority of Greek-Cypriots (52% in 2010 and 59.4% in 2012) is also in favor of freedom to express even extreme ideas online (Figure 1.7.1.4).

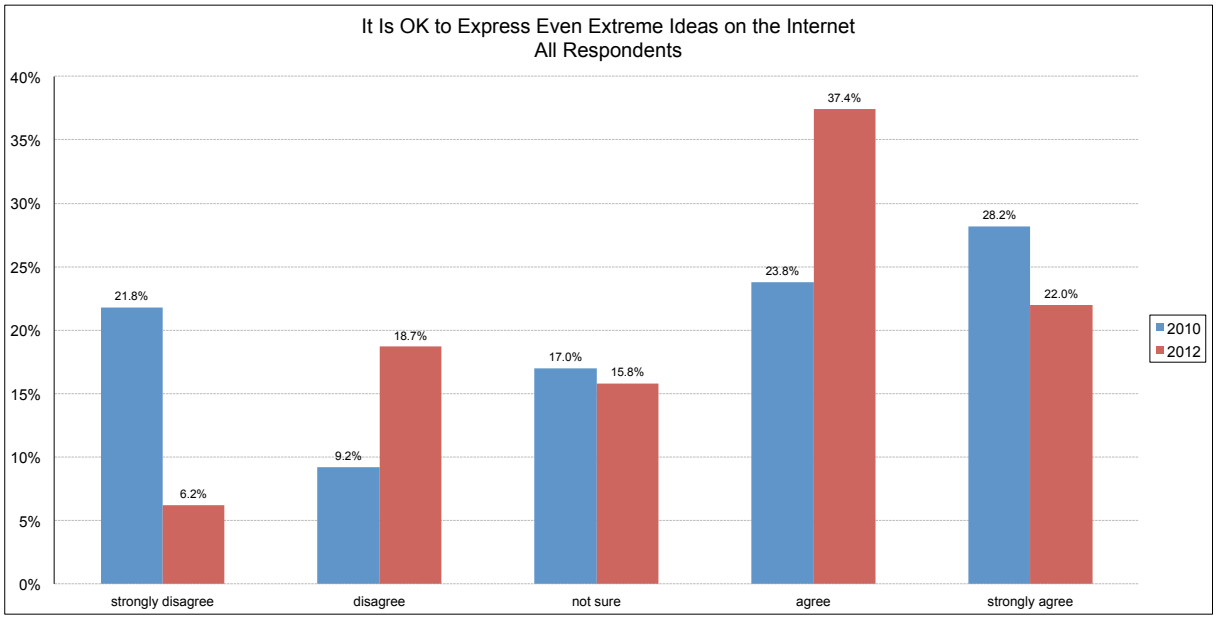

Figure 1.7.1.4. *Expression of extreme ideas online*

Finally, although the majority of the respondents is in favor of more governmental regulation of the internet, a significant proportion of the respondents moved away from extreme positions on both sides of the degree scale (Figure 1.7.1.5).

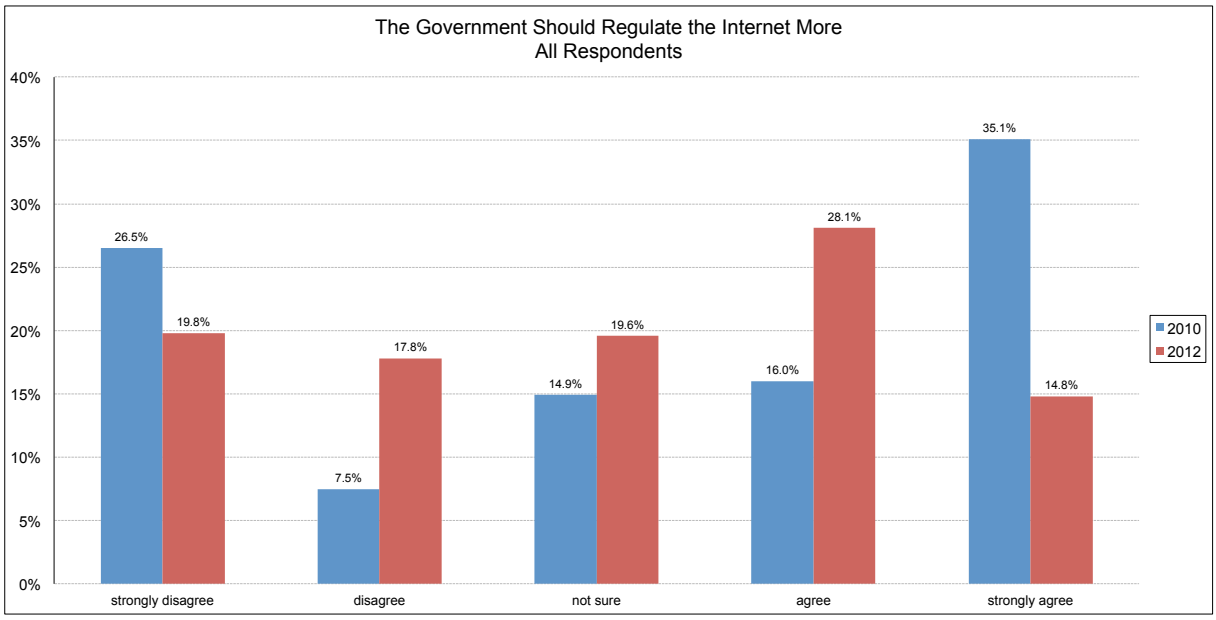

Figure 1.7.1.5. *Government regulation of the internet*

1.7.2. Surveillance

Internet users were also asked whether they are worried about the government and companies checking what they do online. The large majority of Greek-Cypriot internet users (62.9%) are not concerned about having their online activity monitored by the state. Still, the percentage of those who stated that they are not concerned at all about governmental surveillance has dropped to 24.9% in 2012 from 68.0% in 2010 (Figure 1.7.2.1).

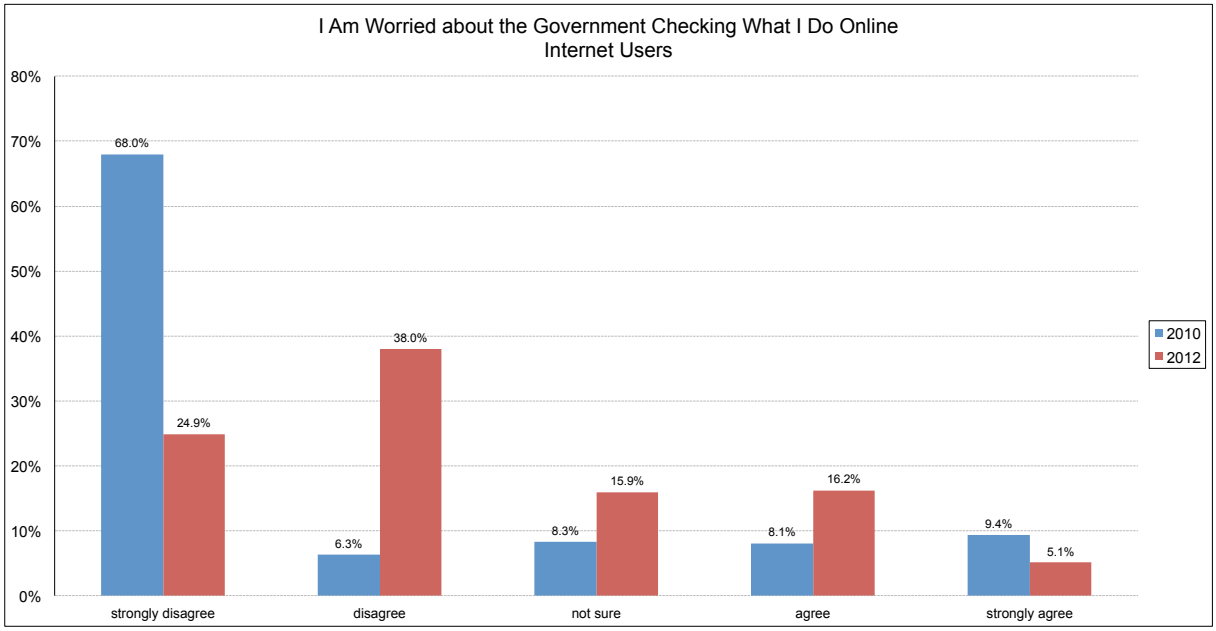

Figure 1.7.2.1. *Concerns about online surveillance by the government*

A similar pattern is observed regarding Greek-Cypriot internet users' concerns about the private sector monitoring online activity. Although the 2010 measurement indicated that the majority of Greek-Cypriot internet users are not concerned about companies

monitoring their online activity, the data from 2010 suggest that there is a growing concern among internet users regarding their online privacy (Figure 1.7.2.2).

Figure 1.7.2.2. *Concerns about online surveillance by companies*

PART 2.

INTERNET USE IN THE GREEK-CYPRIOT AND TURKISH-CYPRIOT COMMUNITIES (2012)

2.1. INTERNET ACCESS AND USE

2.1.1. Internet Penetration

No significant differences between the two communities are observed with respect to internet use. In both the Greek-Cypriot and the Turkish-Cypriot communities, around 60% of the respondents were using the internet during 2012, with a slightly higher percentage observed on the Greek-Cypriot side (Figure 2.1.1.1).

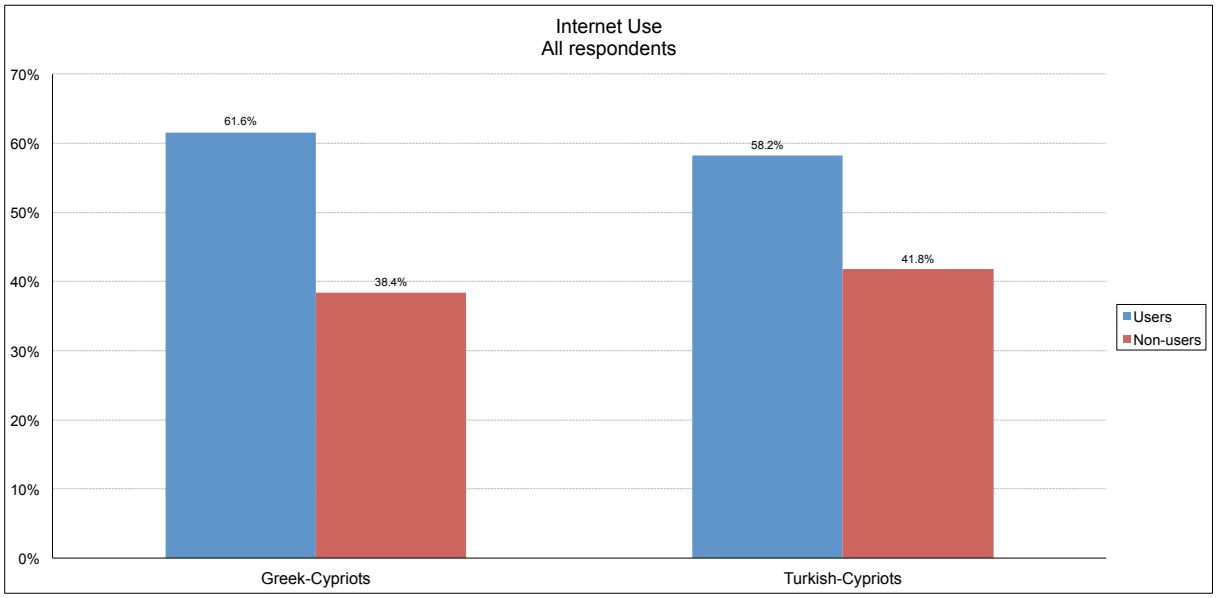

Figure 2.1.1.1. *Internet use*

2.1.2. Internet Use by Access Location

Figure 2.1.2.1 illustrates the various locations of internet access. In both communities most users access the internet from their home. Internet access at school is higher in the Greek-Cypriot community, while a higher percentage of Turkish-Cypriots access the internet from mobile devices.

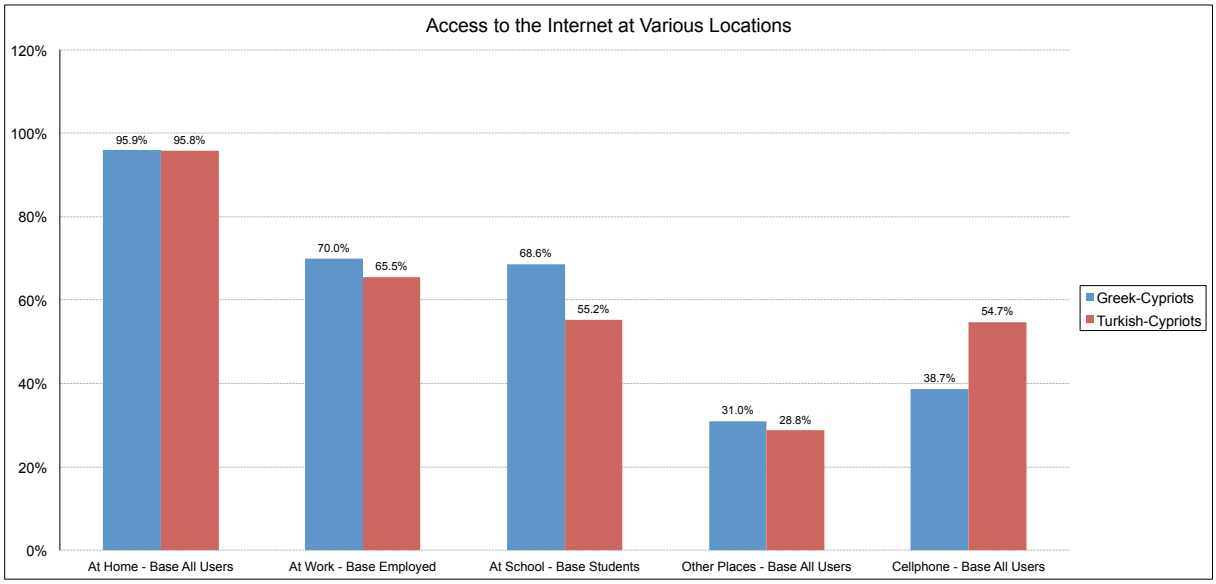

Figure 2.1.2.1. *Internet access from various locations*

Although the percentages of internet users per location are very similar in the two communities, Greek-Cypriots seem to spend much more time online than Turkish-Cypriot users. More specifically, Greek-Cypriot users spend time online at home on average 7 hours per week more than Turkish-Cypriots, about 4 hours more at work and 4 at school. It is also striking that Greek-Cypriot users spend 3 hours online more than Turkish-Cypriots using mobile devices, despite the fact that the percentage of cell phone internet users is higher among Turkish-Cypriots (Figure 2.1.2.2.).

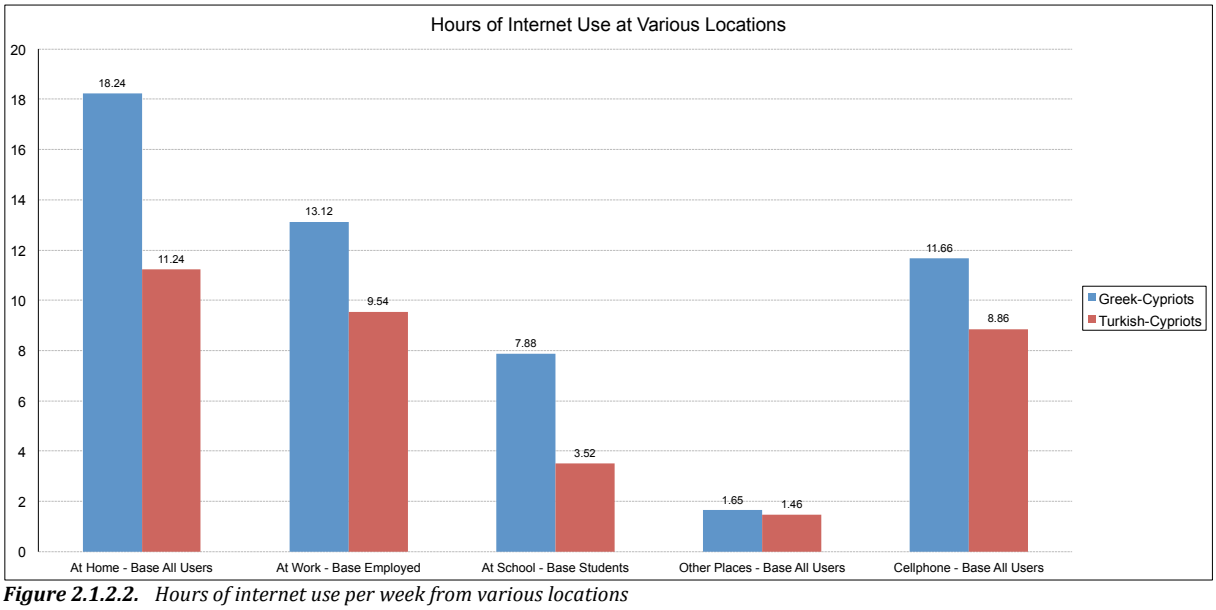

Figure 2.1.2.2. *Hours of internet use per week from various locations*

2.1.3. Type of Internet Connection at Home

The overwhelming majority of Greek-Cypriot internet users (almost nine in ten) connect to the internet at home via broadband connections and only about one in ten by a phone modem. Turkish-Cypriot users are more likely than Greek-Cypriots to connect through a

dial-up modem (32%), while the percentage of those who have a broadband connection is more than 30 percentage points lower than that of the Greek-Cypriots (Figure 2.1.3.1). It should also be noted that 11.6% of Turkish-Cypriot internet users access the internet from home via mobile phone.

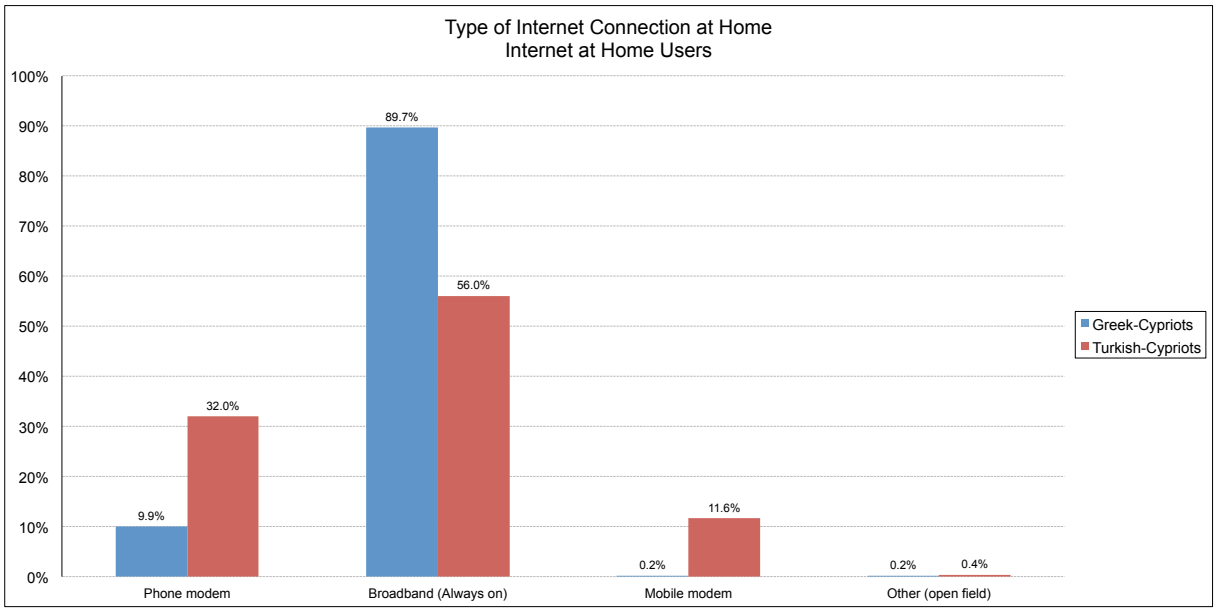

Figure 2.1.3.1. *Type of connection at home*

2.1.4. Digital Divide

The existence of a "digital divide" in Cyprus is apparent on certain dimensions in both communities. With respect to gender (Figure 2.1.4.1), there is a larger gap between males and females in the Turkish-Cypriot community (64.5% vs 50.8% compared to 67.5% vs 55.7% in the Greek-Cypriot community).

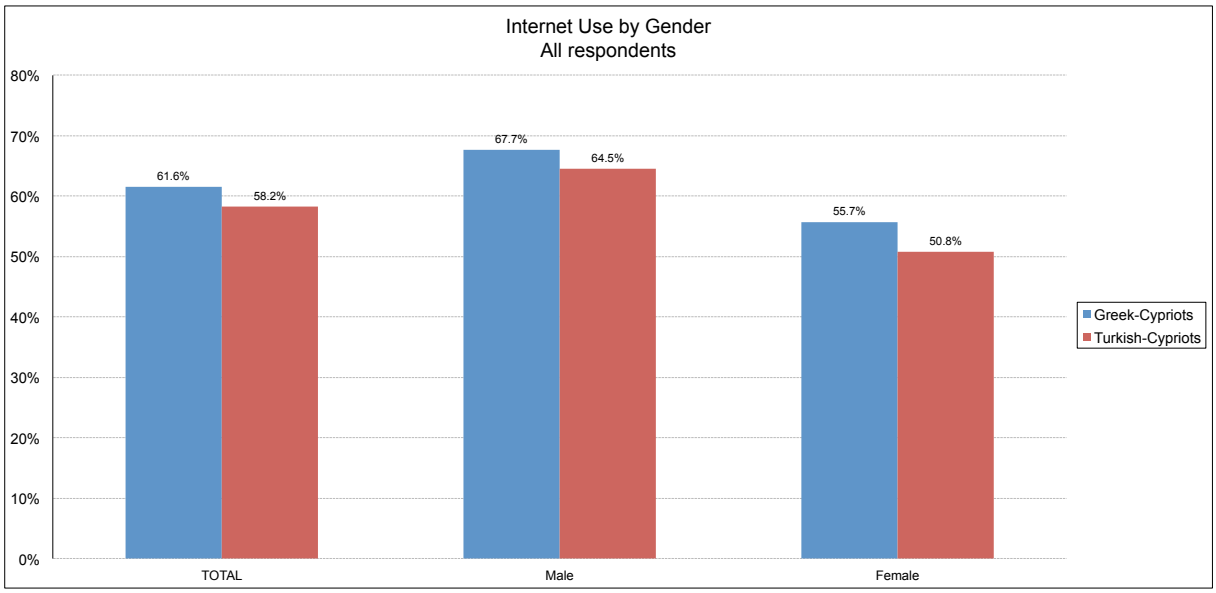

Figure 2.1.4.1. *Internet use by gender*

Regarding the age divide, clear differences appear in both communities (Figures 2.1.4.2) with internet use decreasing with age.

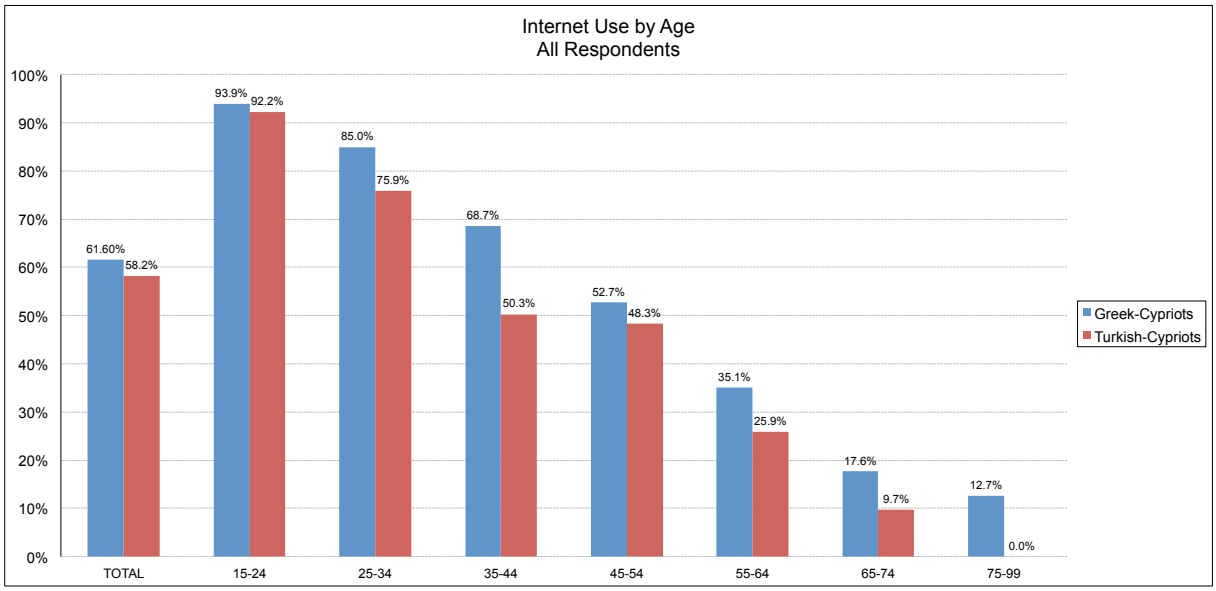

Figure 2.1.4.2. *Internet use by age*

Educational level is another major dimension on which the digital divide is apparent (Figure 2.1.4.3). In both communities, respondents with a higher level of education are much more likely to be internet users.

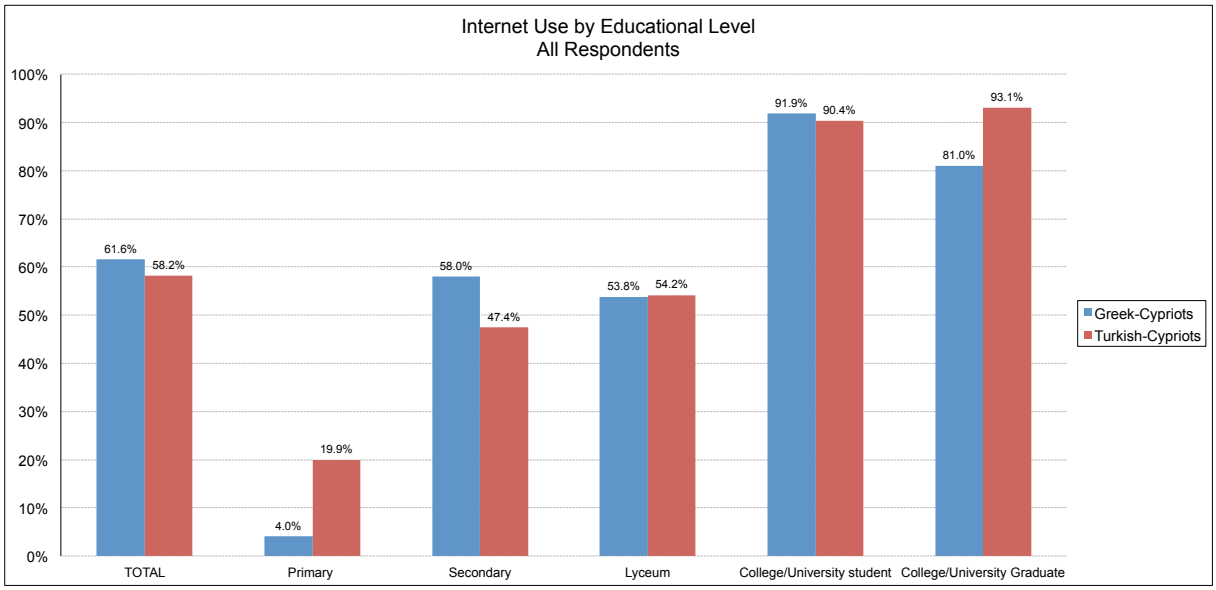

Figure 2.1.4.3. *Internet Use by educational level*

Although internet use in the two communities is similar in most employment categories (Figure 2.1.4.4), internet use among Turkish-Cypriot housewives and househusbands is significantly higher (76.5%) than on the Greek-Cypriot side (22.6%), while among the unemployed it is higher among Greek-Cypriots (60% vs 25.7% among the Turkish-Cypriot unemployed).

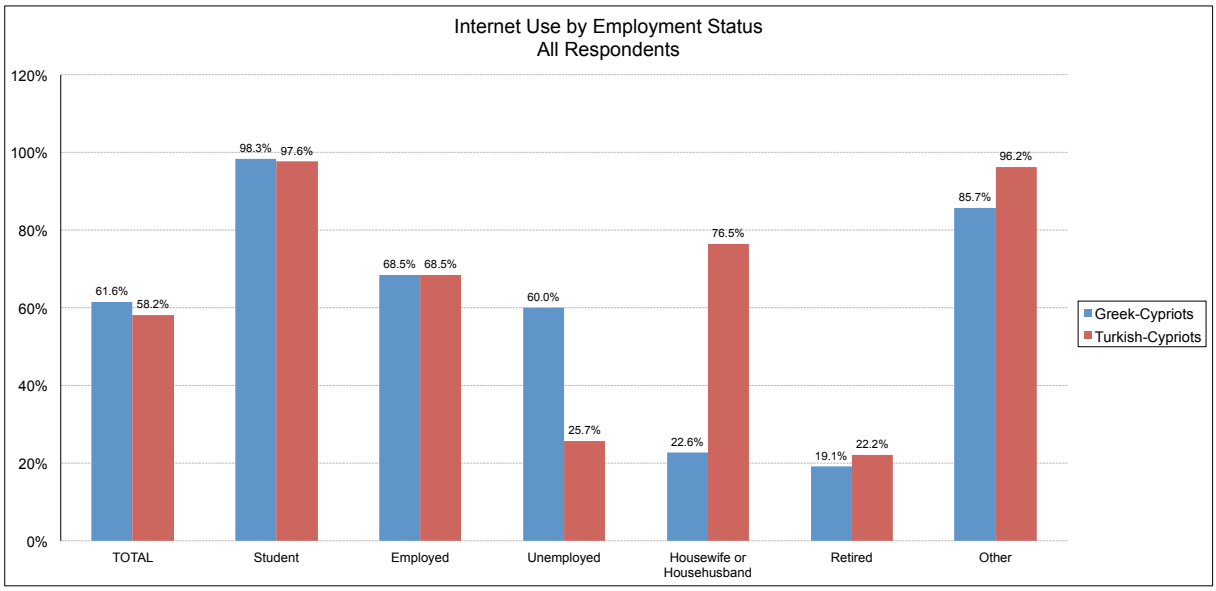

Figure 2.1.4.4. *Internet use by employment status*

Internet use also (positively) correlates with monthly gross income (Figure 2.1.4.5).

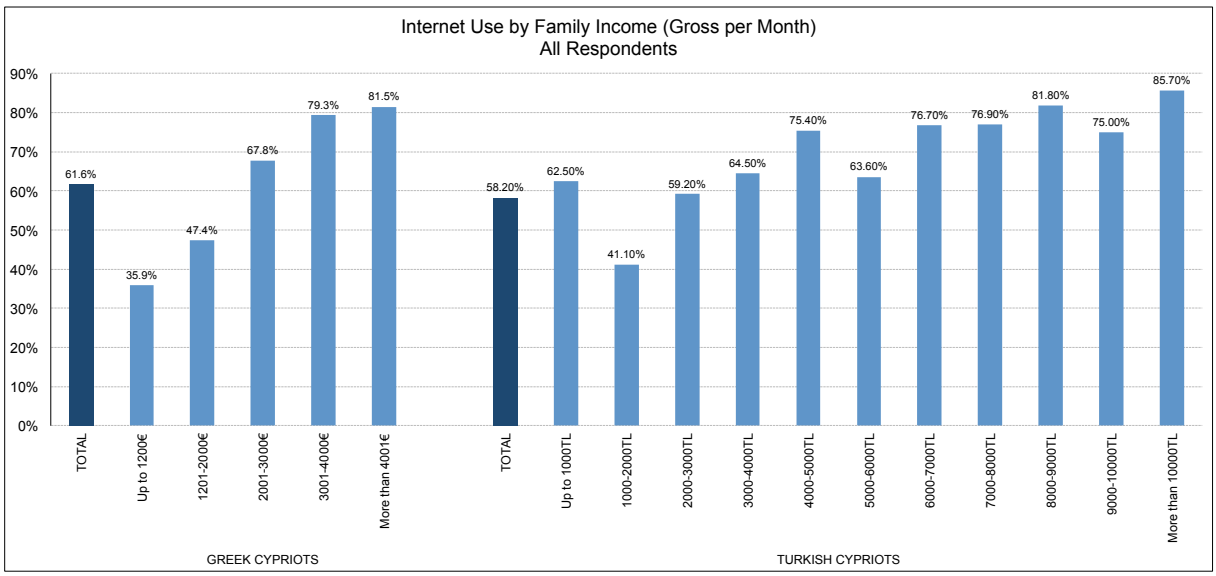

Figure 2.1.4.5. *Internet use by income*

A significant difference between the two communities is observed regarding internet use by area type (Figure 2.1.4.6). Although rates of use are similar in urban and rural areas on the Greek-Cypriot side, there is a 13.8% difference on the Turkish-Cypriot side, with urbanites using the internet at a rate of 64.1% and rural residents at a rate of 50.3%.

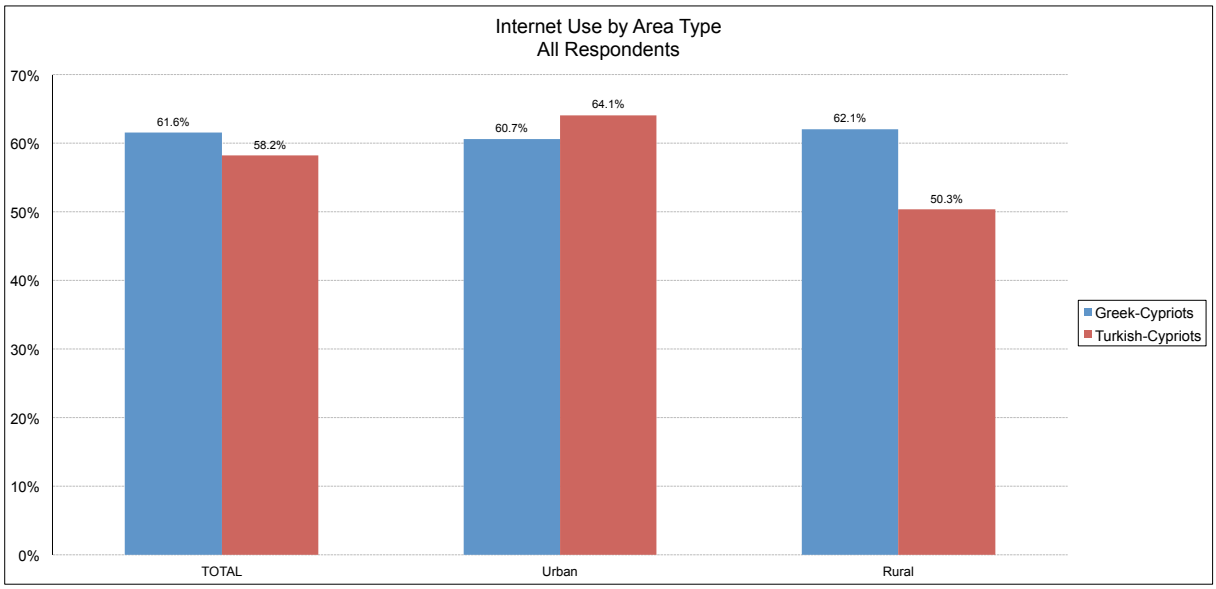

Figure 2.1.4.6. *Internet use by area type*

The picture with respect to citizenship is also very different in the two communities (Figure 2.1.4.7). In the Greek-Cypriot side, internet use among non-Cypriot nationals is very high (79%), while in the Turkish-Cypriot side only half of the respondents who had both the Cypriot as well as a second nationality (mostly Turkish) were internet users. It should be noted however that the categories of comparison are not the same as it was not possible to use the category "Cyprus and Other" in the Greek-Cypriot sample and the category "Other" in the Turkish-Cypriot sample because there were very few Greek-Cypriots with a dual nationality and very few non Turkish-Cypriots in the sample.

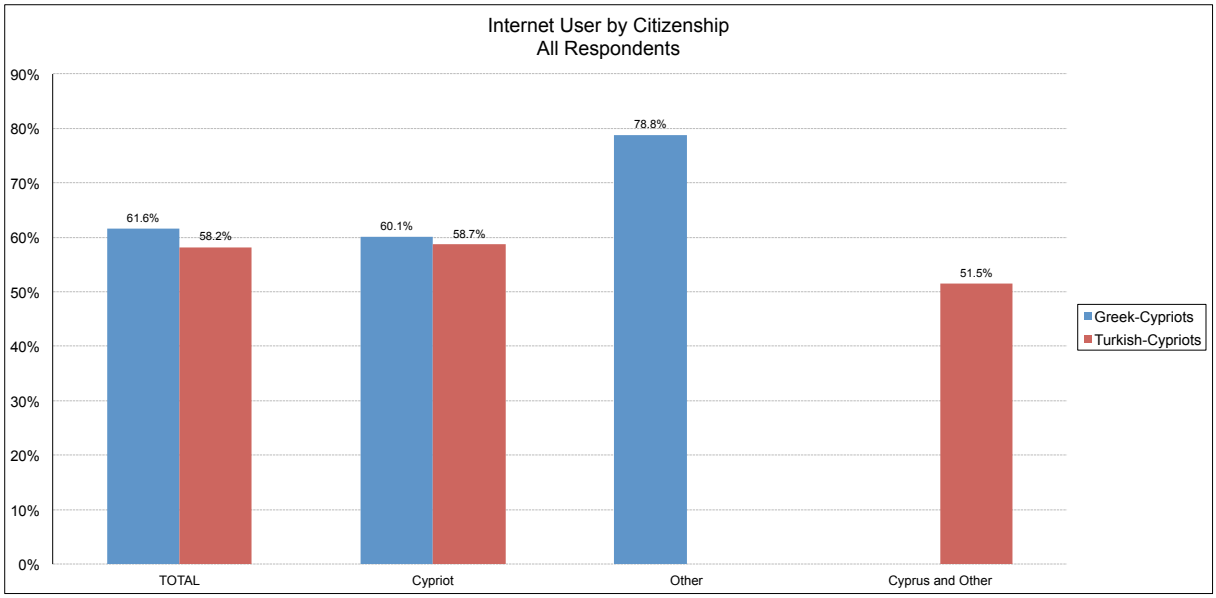

Figure 2.1.4.7. *Internet use by citizenship*

Finally, a critical factor affecting internet use is the presence in the household of children under the age of 18 with an apparent positive effect of children on internet use in both communities (Figure 2.1.4.8).

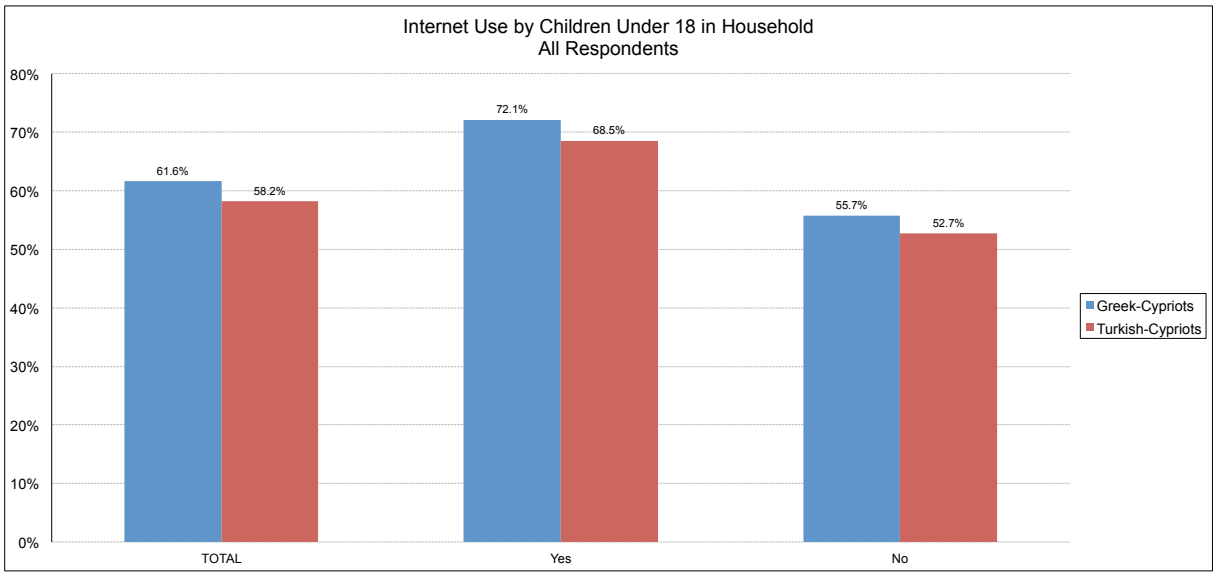

Figure 2.1.4.8. *Internet use by children in the household*

2.1.5. Internet Non-Use

As shown in Figure 2.1.5.1, although the amount of non-users remains at around 40% in both communities, the actual percentage of respondents who have never been internet users is significantly lower. The percentage is higher in the Turkish-Cypriot side, as 33.8% of the sample has never used the internet as opposed to 28.0% in the Greek-Cypriot sample.

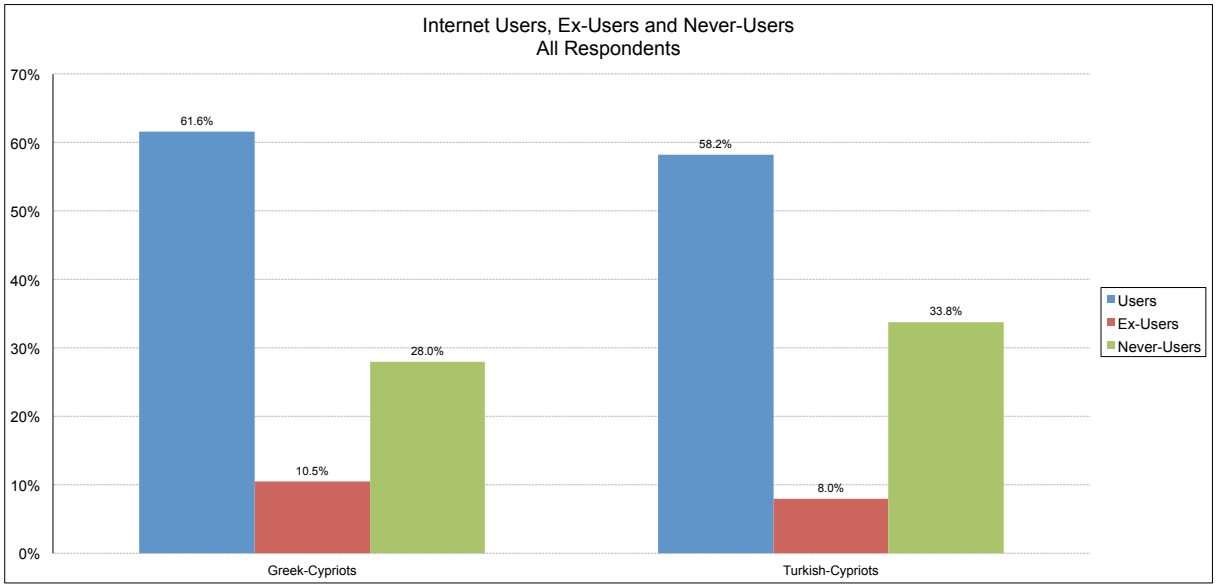

Figure 2.1.5.1. *Internet Users, Ex-Users and Never-Users*

Lack of knowledge and interest, remain the main reasons for not using the internet in both communities (Figure 2.1.5.2). Nevertheless, while 17.4% the Greek-Cypriots mention lack of time as the reason for not using the internet, the corresponding figure for Turkish-Cypriots is only 5.9%. On the other hand, 17.8% of the Turkish-Cypriot sample mentioned the high cost of internet connection as the reason for non-use, while only 2% of the Greek-Cypriots said so.

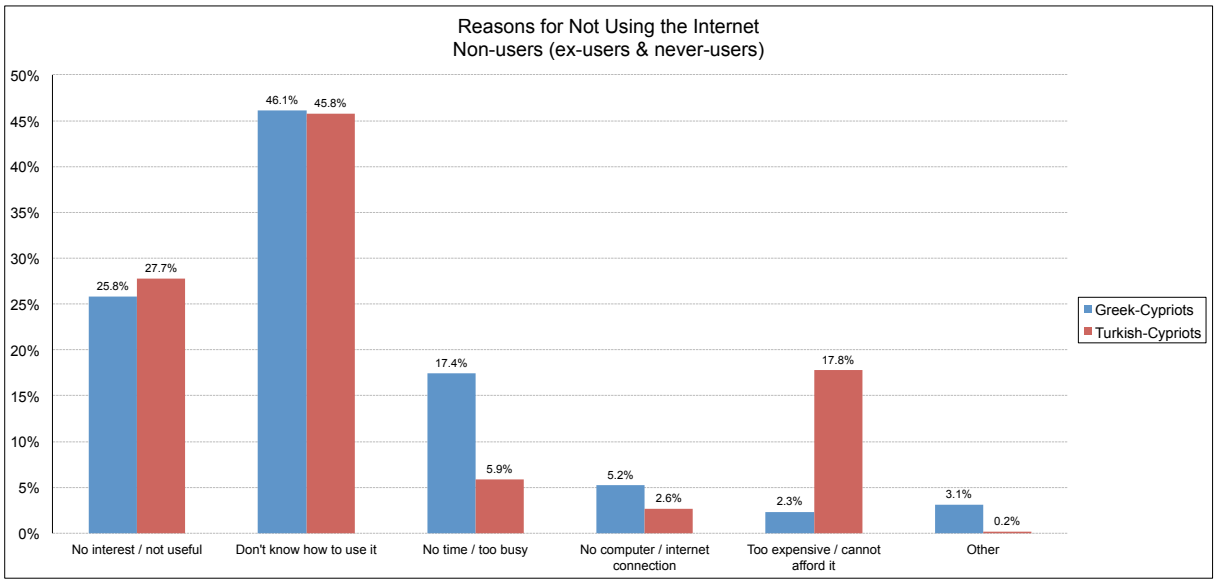

Figure 2.1.5.2. *Reasons for not using the internet*

Turkish-Cypriots seem to remain more reluctant than Greek-Cypriots to use the internet, as 63.6% of non-users say that it is not likely at all to use the internet in the next year (Figure 2.1.5.3). On the other hand, 17% of Greek-Cypriot non-users declare that it is very likely to start using the internet in the future (as opposed to only 6.3% of Turkish-Cypriots).

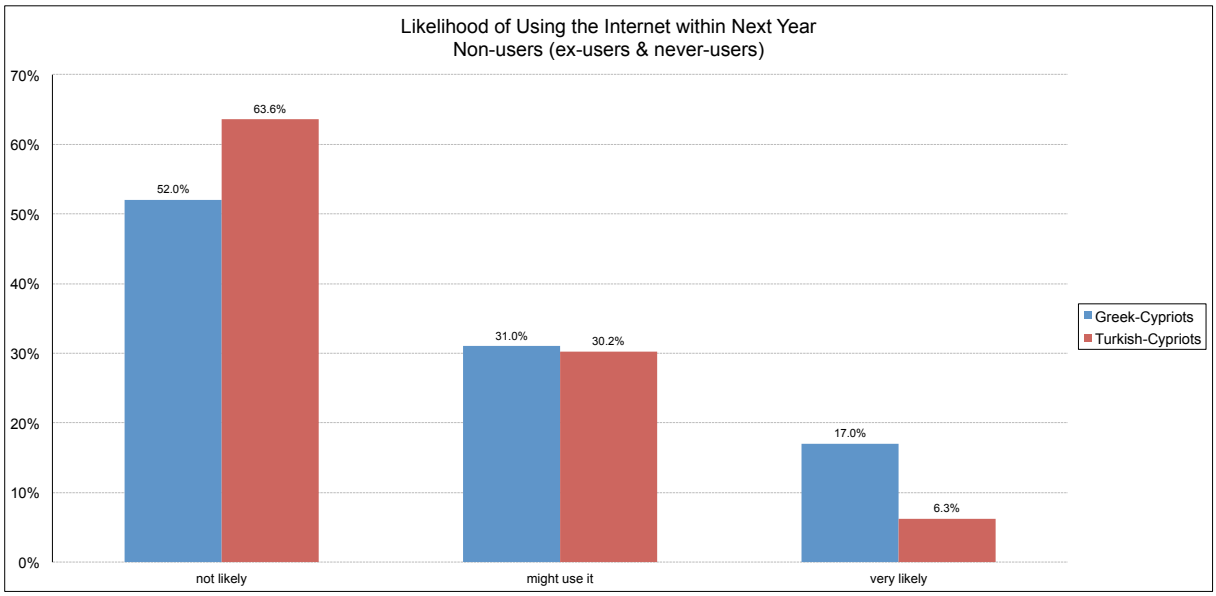

Figure 2.1.5.3. *Likelihood of using the internet within next year*

2.2. SOURCES OF INFORMATION AND ENTERTAINMENT

2.2.1. The Internet

No significant differences were found between the two communities regarding the importance of the internet as a source of information. An overwhelming majority of internet users in both communities consider that the internet is an important source of information (Figure 2.2.1.1).

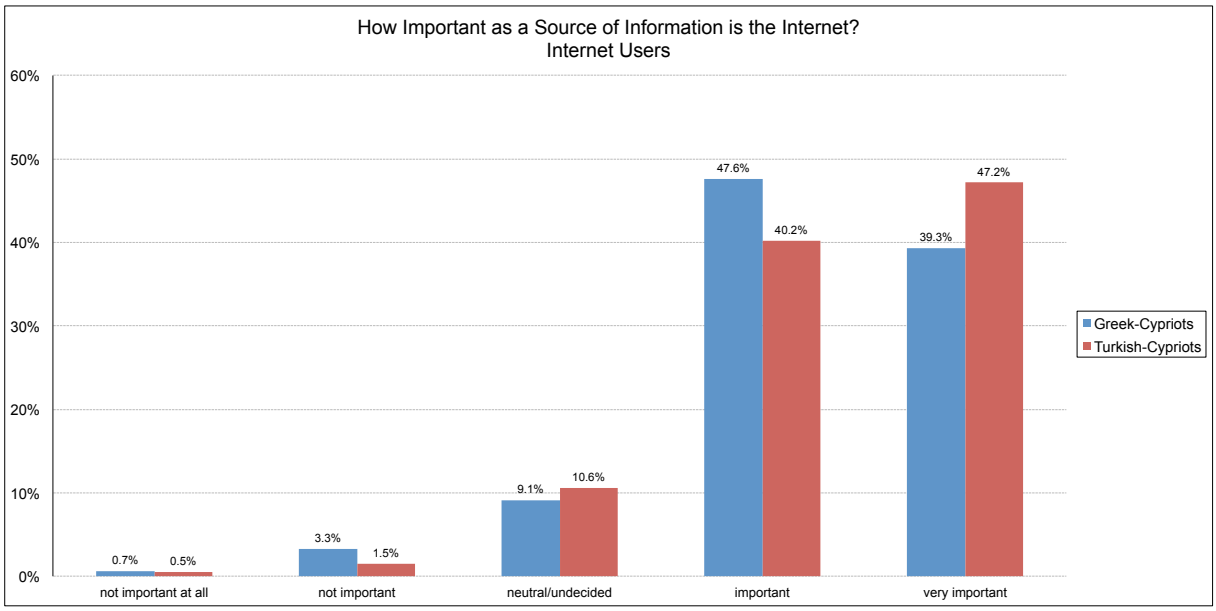

Figure 2.2.1.1. *Importance of the internet for information*

Compared to Greek-Cypriot internet users, Turkish-Cypriots tend to be slightly more trustful of the reliability of online information (Figure 2.2.1.2).

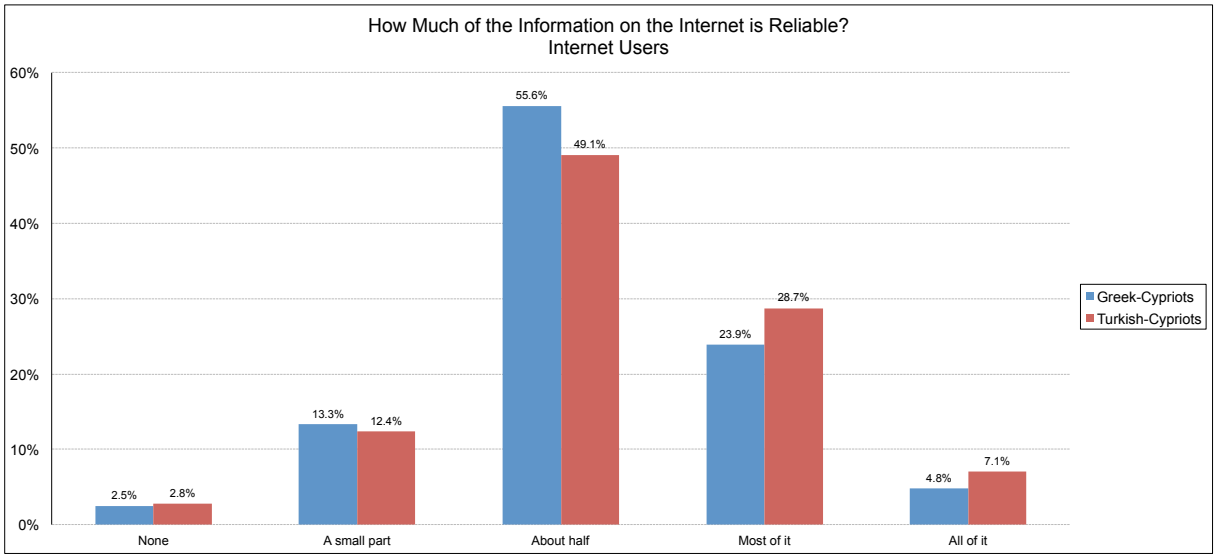

Figure 2.2.1.2. *Internet reliability*

Most Greek-Cypriot users (72.8%) and an even higher percentage of Turkish-Cypriot users (80.5%) stated that the internet is an important or very important source of entertainment (Figure 2.2.1.3)

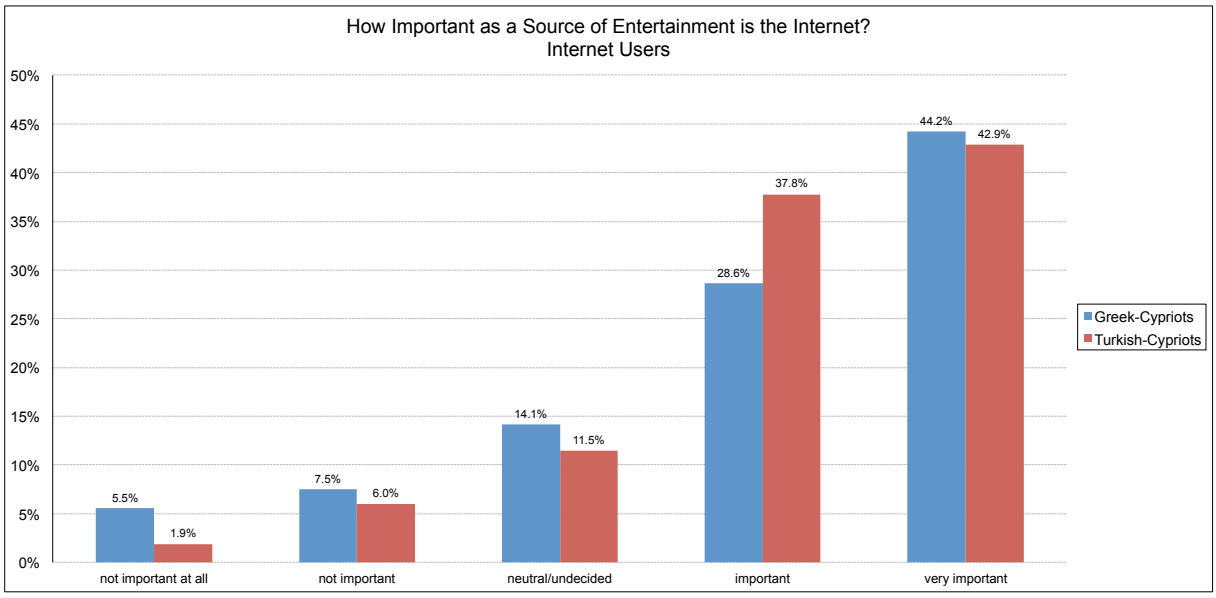

Figure 2.2.1.3. *Importance of the internet for entertainment*

2.2.2. Television

Most internet users in both communities report that television is an important or very important source of information. Turkish-Cypriot users seem to attribute more importance on the informational role of television, as 78.5% consider that television is an important or very important source of information (Figure 2.2.2.1). Similar findings resulted among Greek-Cypriot users although the corresponding percentage is slightly lower (69.0%).

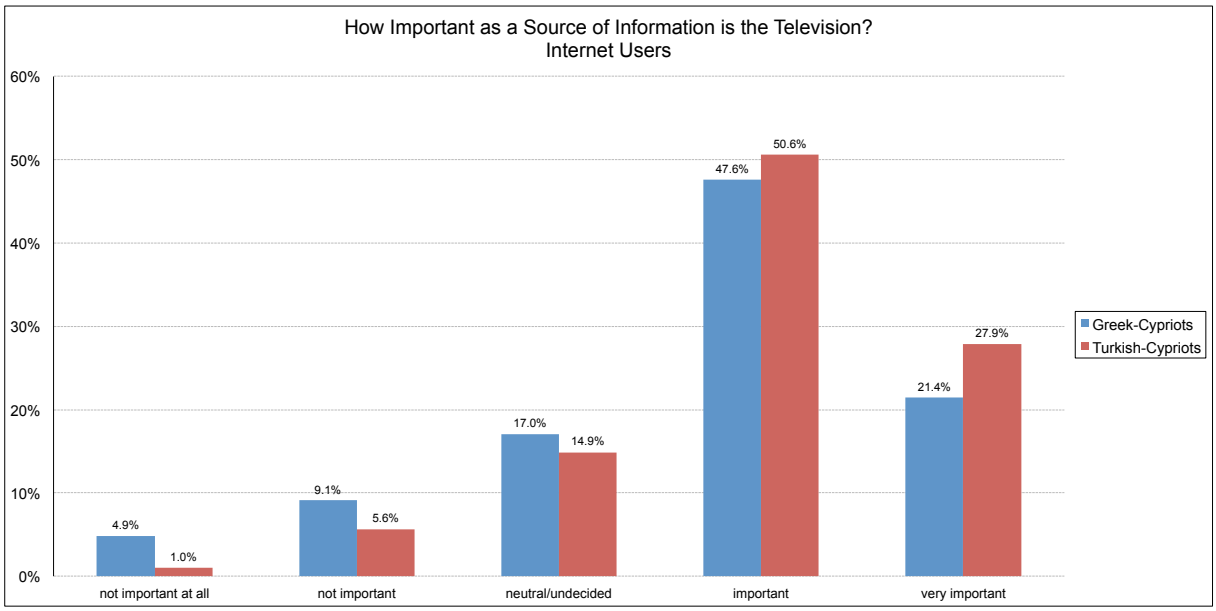

Figure 2.2.2.1. *Importance of television for information*

As shown in Figure 2.2.2.2, both Greek-Cypriot and Turkish-Cypriot internet users think that television is also an important or very important source of entertainment (70.8% and 80.9% respectively).

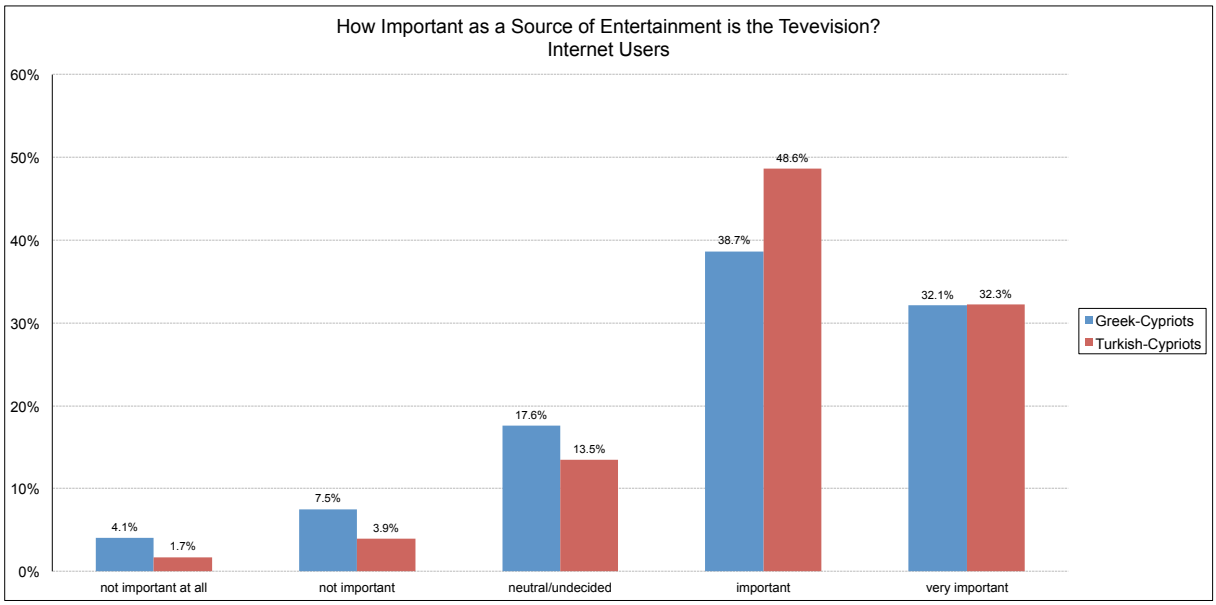

Figure 2.2.2.2. *Importance of television for entertainment*

2.2.3. Newspapers

Regarding newspapers and their perceived importance as an information source, Turkish-Cypriot internet users value newspapers more than Greek-Cypriots, as 81.1% report that newspapers are an important or very important source of information, while the corresponding figure in the Greek-Cypriot sample is 63.5% (Figure 2.2.3.1).

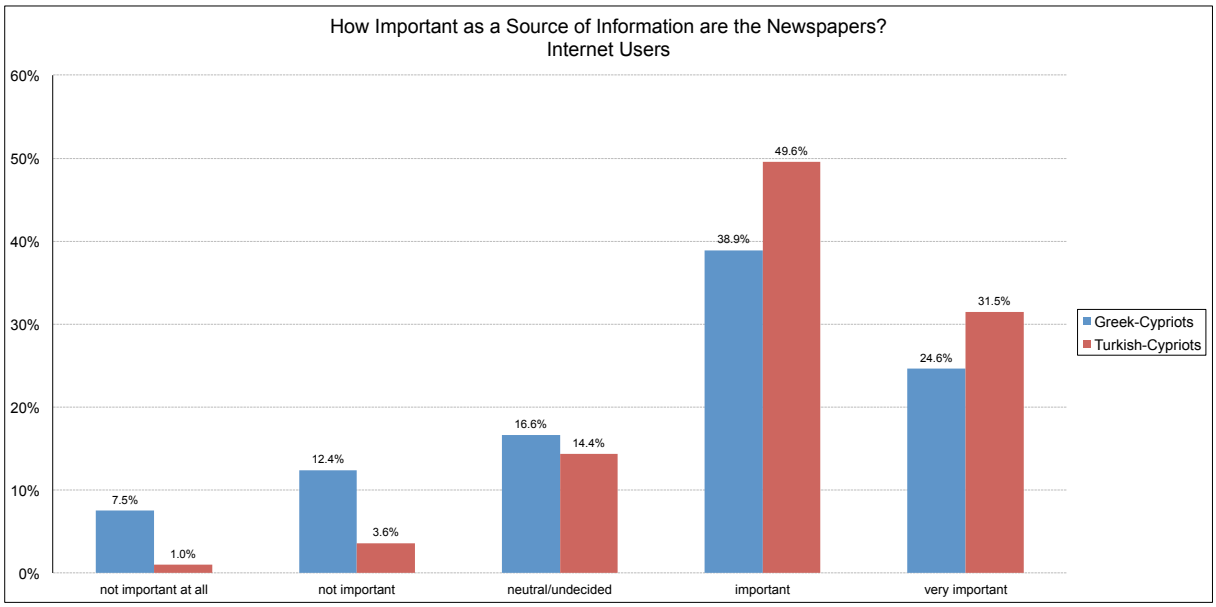

Figure 2.2.3.1. *Importance of newspapers for information*

A very different image resulted with respect to perceptions of newspapers as a source of entertainment. For more than half Greek-Cypriot internet users (55.3%) newspapers are not important or not important at all as a source of entertainment, while for Turkish-Cypriot internet users the corresponding figure is only 21.4%, with 50.3% indicating that newspapers are an important or very important entertainment source (Figure 2.2.3.2).

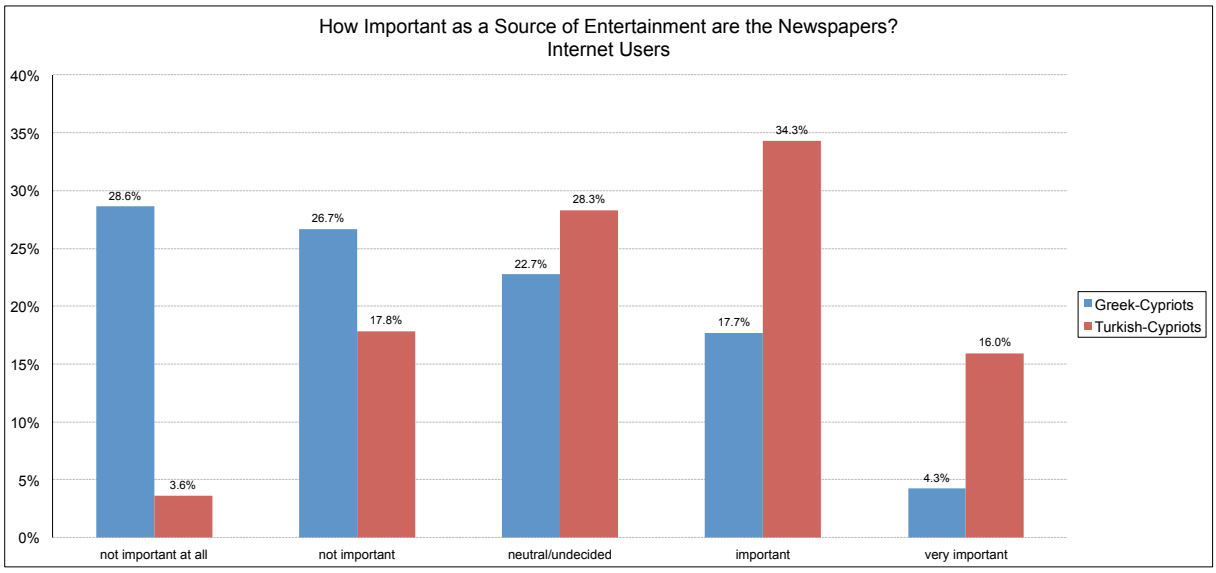

Figure 2.2.3.2. *Importance of newspapers for entertainment*

2.2.4. Radio

The pattern is similar concerning the importance of the radio as a source of information. Most Turkish-Cypriot internet users (61.0%) believe that the radio is an important or very important source of information. A similar, although lower, percentage (54.5%) of Greek-Cypriot internet users consider the radio as an important or very important source of information (Figure 2.2.4.1).

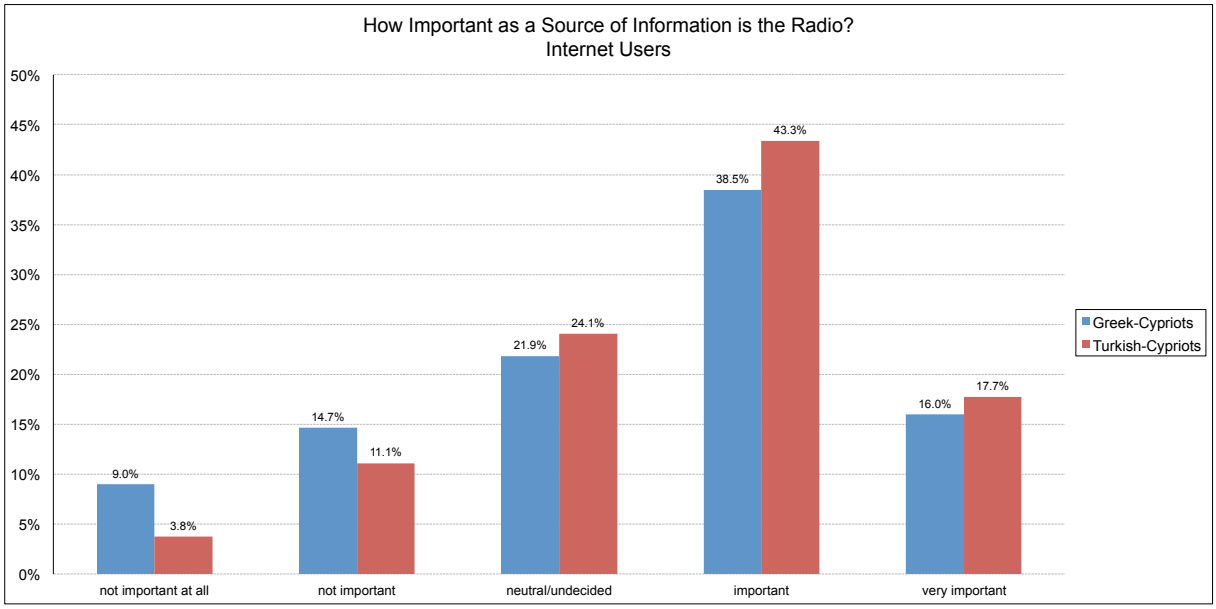

Figure 2.2.4.1. *Importance of radio for information*

Both Greek-Cypriot and Turkish-Cypriot internet users consider the radio as an important or very important source of entertainment: 60.4% of the Greek-Cypriot respondents and 53.3% of the Turkish-Cypriot respondents (Figure 2.2.4.2).

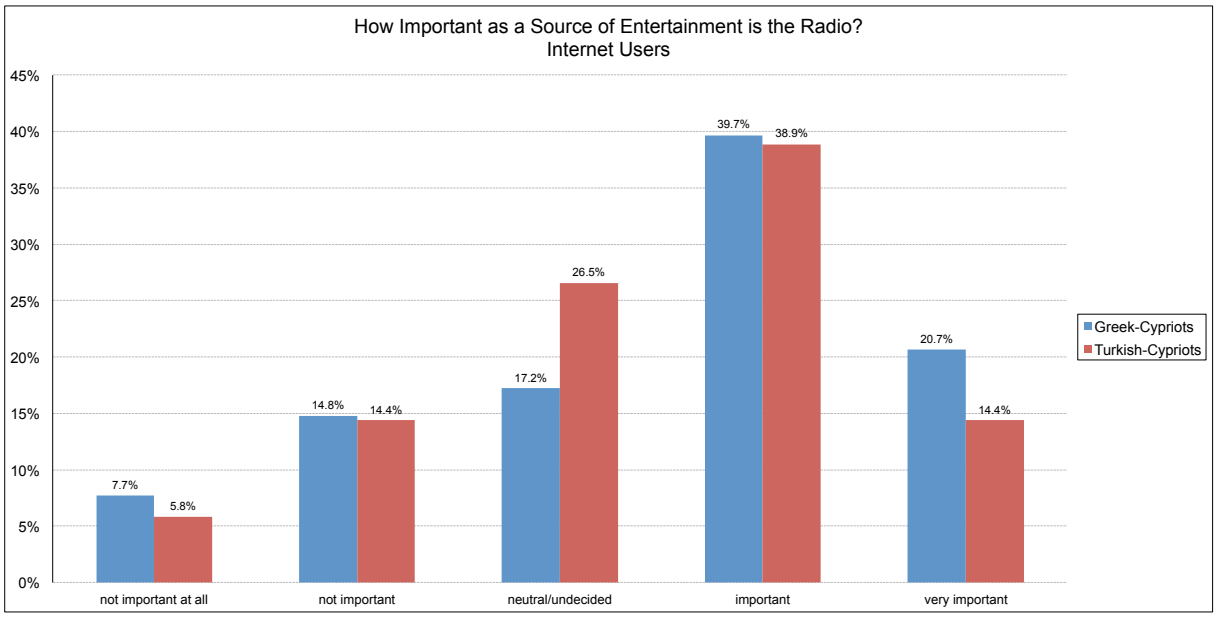

Figure 2.2.4.2. *Importance of radio for entertainment*

2.2.5. Interpersonal sources

Interpersonal relationships appear to be the most important source of information for 77.0% of the Greek-Cypriot internet users and 72.5% of Turkish-Cypriot internet users (Figure 2.2.5.1).

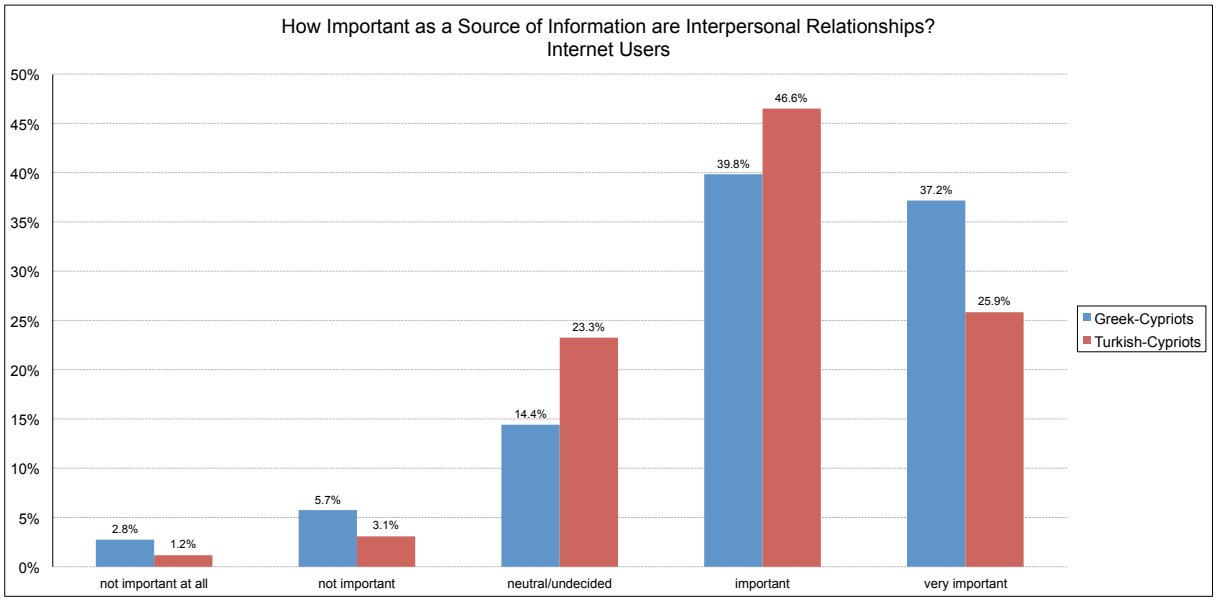

Figure 2.2.5.1. *Importance of interpersonal sources for information*

2.3. TRADITIONAL MEDIA USE

2.3.1. Television

No significant differences between the two communities were identified regarding their television viewing habits (Figure 2.3.1.1).

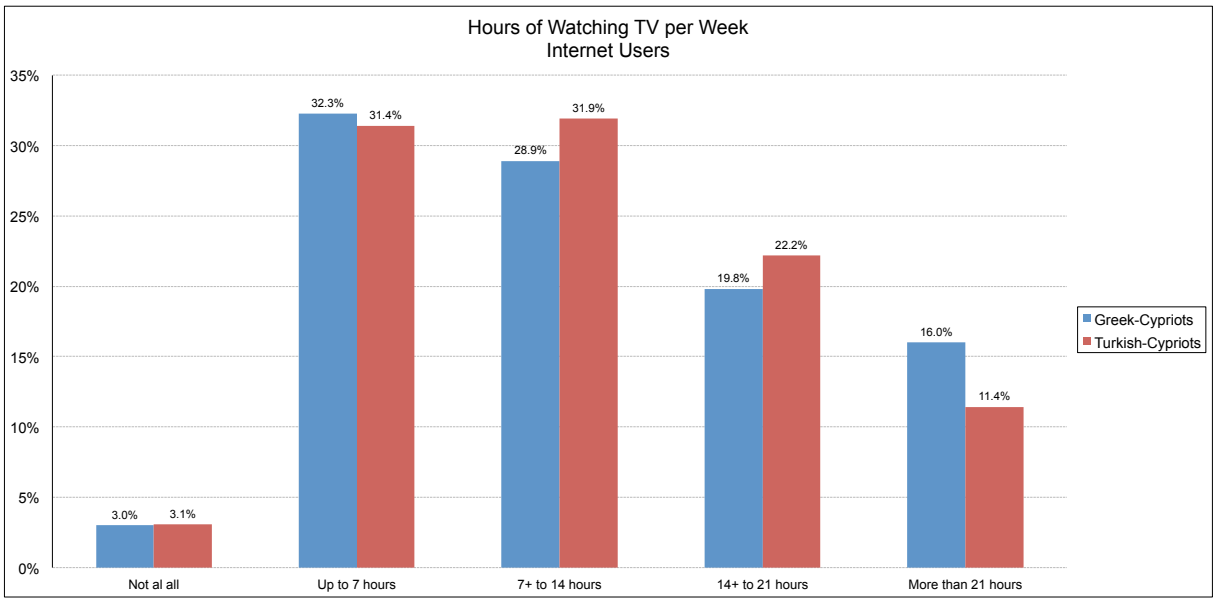

Figure 2.3.1.1. *Hours of TV viewing*

2.3.2. Radio

The majority of internet users in Cyprus listen to the radio for up to 7 hours per week (47.9% of Greek-Cypriots and 74.3% of Turkish-Cypriots). In general, the radio seems to be more popular among Greek-Cypriot internet users, as only 7.1% said that they do not listen to the radio at all, while Turkish-Cypriot non-listeners among internet users reach 20.1% (Figure 2.3.2.1). In addition, Greek-Cypriots are more likely to report significantly more hours of listening to the radio.

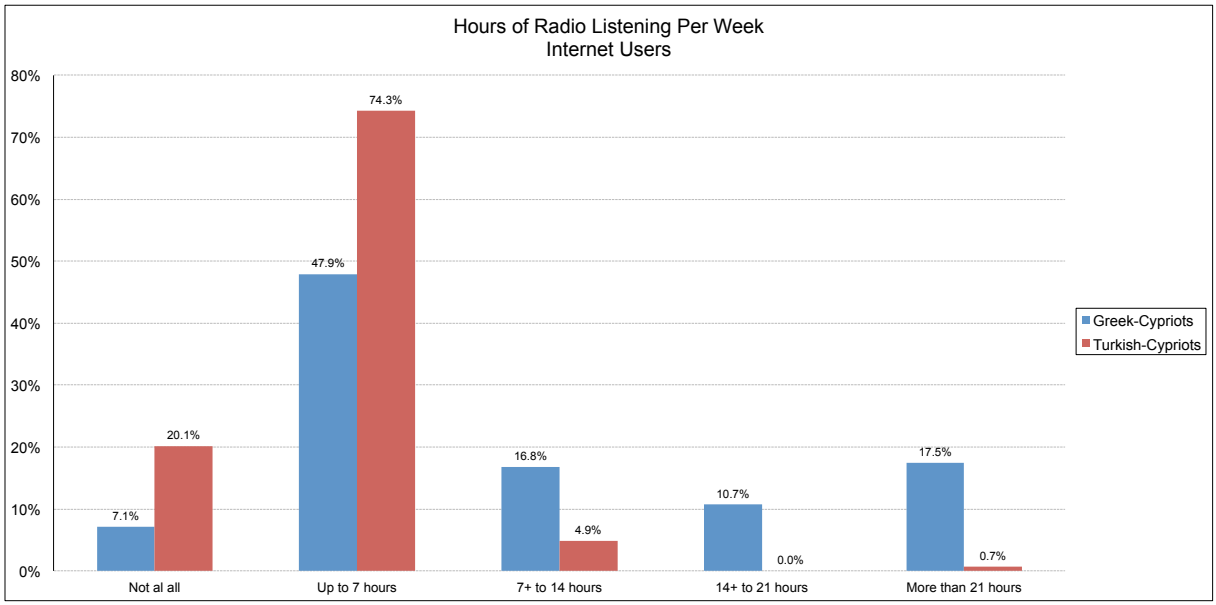

Figure 2.3.2.1. *Hours of radio listening*

2.3.3. Newspapers

Figure 2.3.3.1 shows that the majority of internet users spend up to 7 hours per week reading newspapers (57.1% of Greek-Cypriots and 83.7% of Turkish-Cypriots) while a

significant minority does not read at all (32.1% of Greek-Cypriots and 13.7% of Turkish-Cypriots).

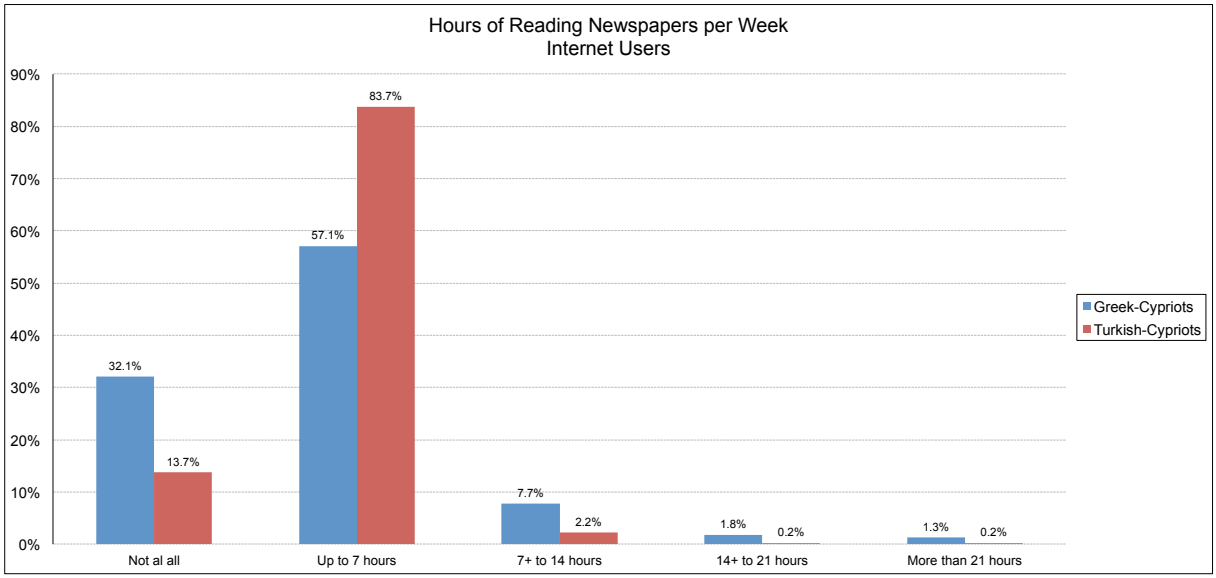

Figure 2.3.3.1. *Hours of newspaper reading*

2.3.4. Comparison of Internet Users and Non-Users

Internet users tend to watch television fewer hours weekly than non-users. The differences are apparent in both communities, as heavy television viewing is more common among non-users of the internet (29.3% of Greek-Cypriot non-users and 25.2% or Turkish-Cypriot non-users), while only 16.0% of Greek-Cypriot users and 11.0% for Turkish-Cypriots users watch television for more than 21 hours per week (Figure 2.3.4.1).

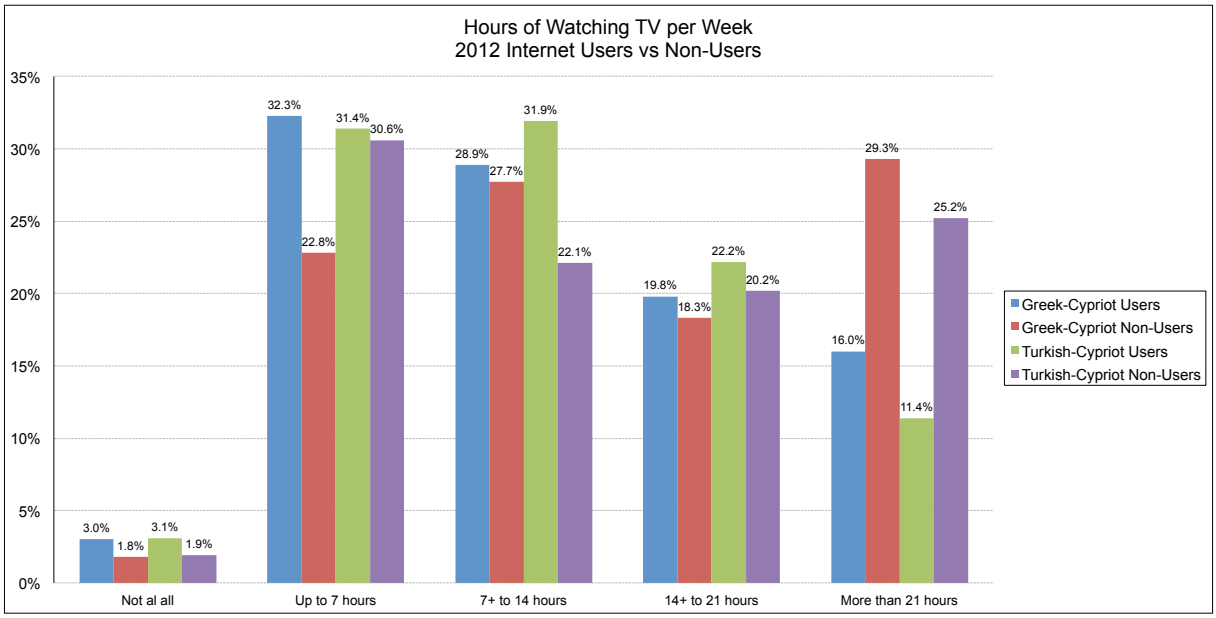

Figure 2.3.4.1. *Hours of TV viewing (users and non-users of the internet)*

Although internet users are normally expected to spend less time than non-users on other media, our data reveal the opposite image regarding Cypriots' radio listening habits. It is remarkable that in both communities internet users spend more time

listening to radio than non-users, while in both communities the percentage of non-users who do not listen to the radio at all is significantly higher than the percentage of users who do not listen to the radio at all (Figure 2.3.4.2).

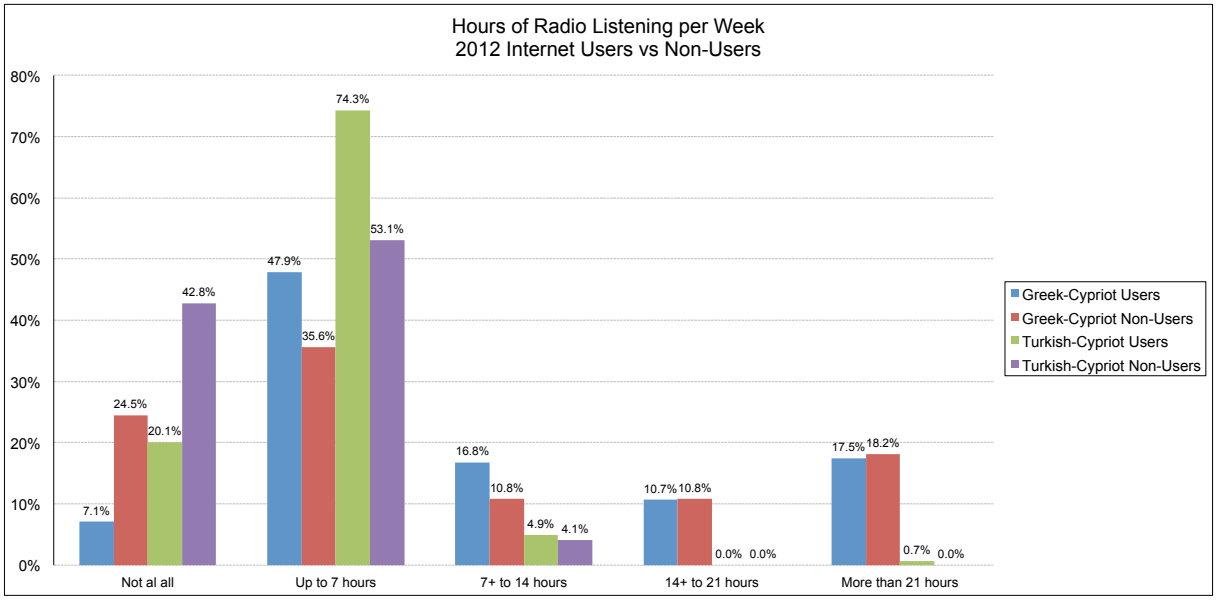

Figure 2.3.4.2. *Hours of radio listening (users and non-users of the internet)*

Newspaper reading seems to be practically unaffected by internet use, as both users and non-users share almost the same reading (or non-reading) habits, while the differences across the two communities persist regardless of internet use or non-use (Figure 2.3.4.3).

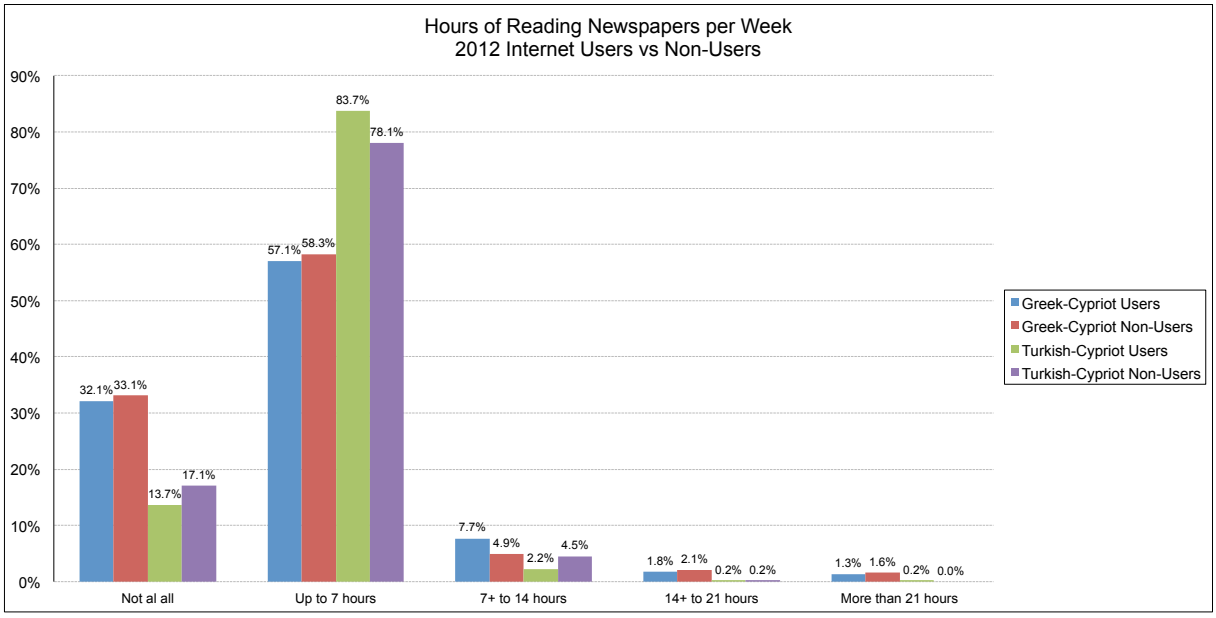

Figure 2.3.4.3. *Hours of newspaper reading (users and non-users of the internet)*

Cypriots who do not use the internet spend more time watching television, while this is not the case for radio and newspapers as internet users' habits are very similar to those of non-users, in both communities (Figure 2.3.4.4).

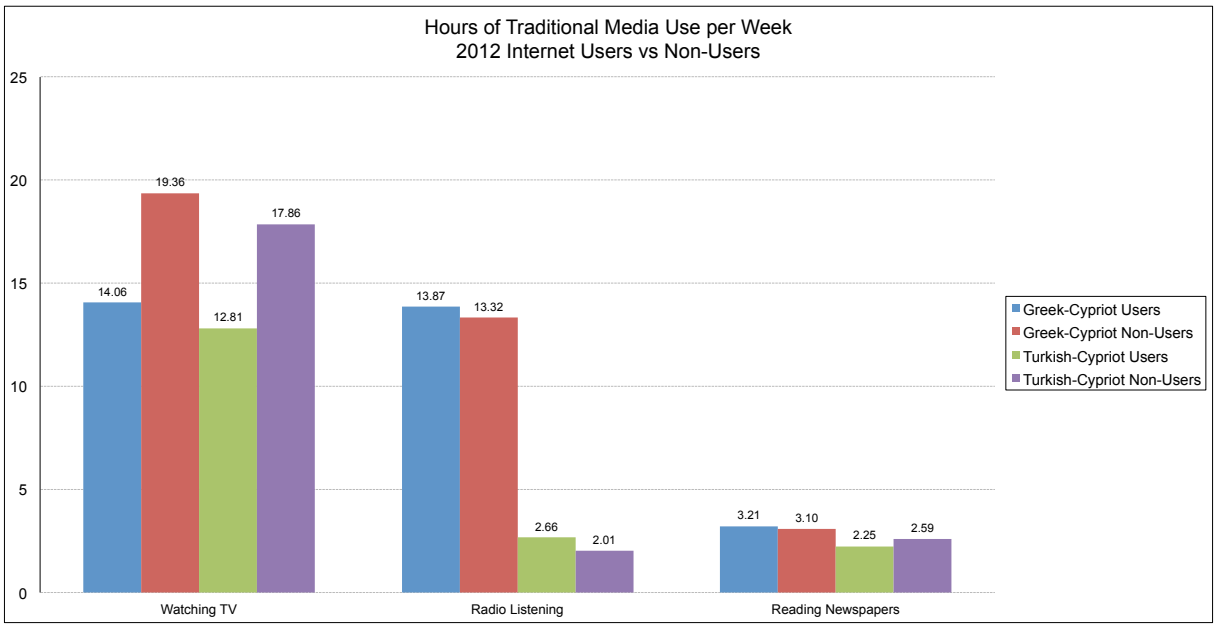

Figure 2.3.4.4. *Hours of use of traditional media*

2.4. SOCIAL RELATIONSHIPS AND COMMUNICATION

2.4.1. Social Relationships

Concerning perceptions of positive or negative effects of internet use on relationships with people with similar hobbies, 62.1% of Greek-Cypriot users feel that their contact with people with similar interests has remained the same since being connected to the internet and 25.7% believes that it has increased. The corresponding rates for Turkish-Cypriots are 38.5% and 47.7% respectively (Figure 2.4.1.1).

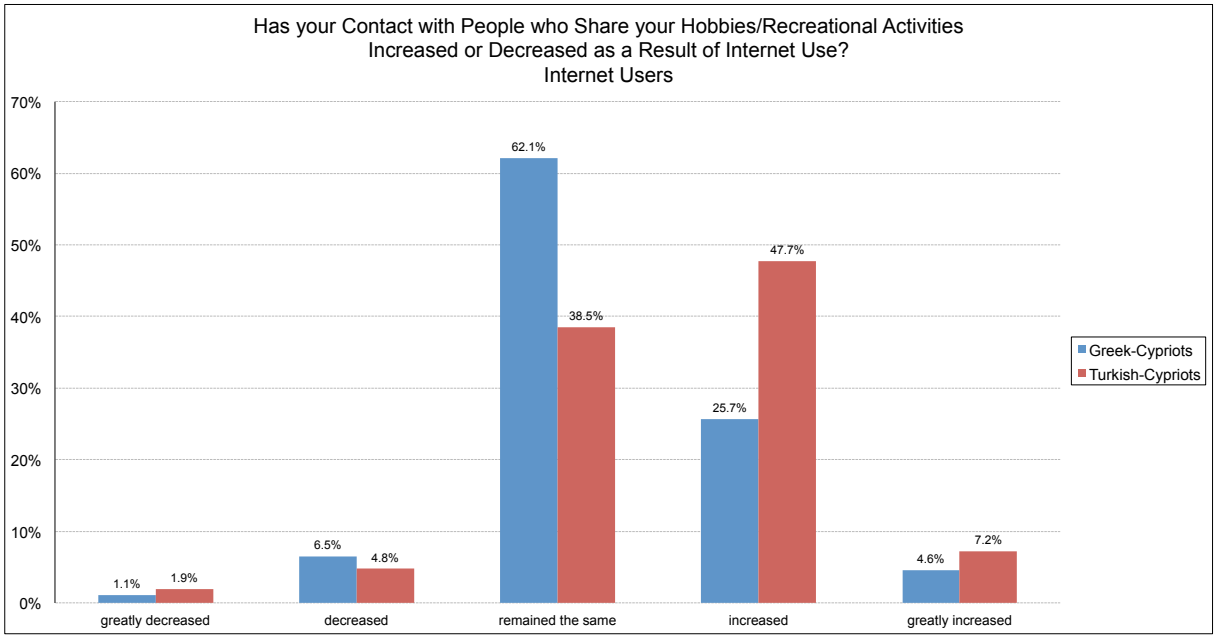

Figure 2.4.1.1. *Contact with people who share the same hobbies*

Regarding contact with people with similar political views, an overwhelming majority in both communities (74.2% of Greek-Cypriots and 64.7% of Turkish-Cypriots) believe that their contact with people who share their political views has remained the same

(Figure 2.4.1.2). Still, the percentage of Turkish-Cypriot users who think that contact with people who share their political views has increased is 24.4%, almost ten percentage points higher than the corresponding figure for Greek-Cypriots (15.1%).

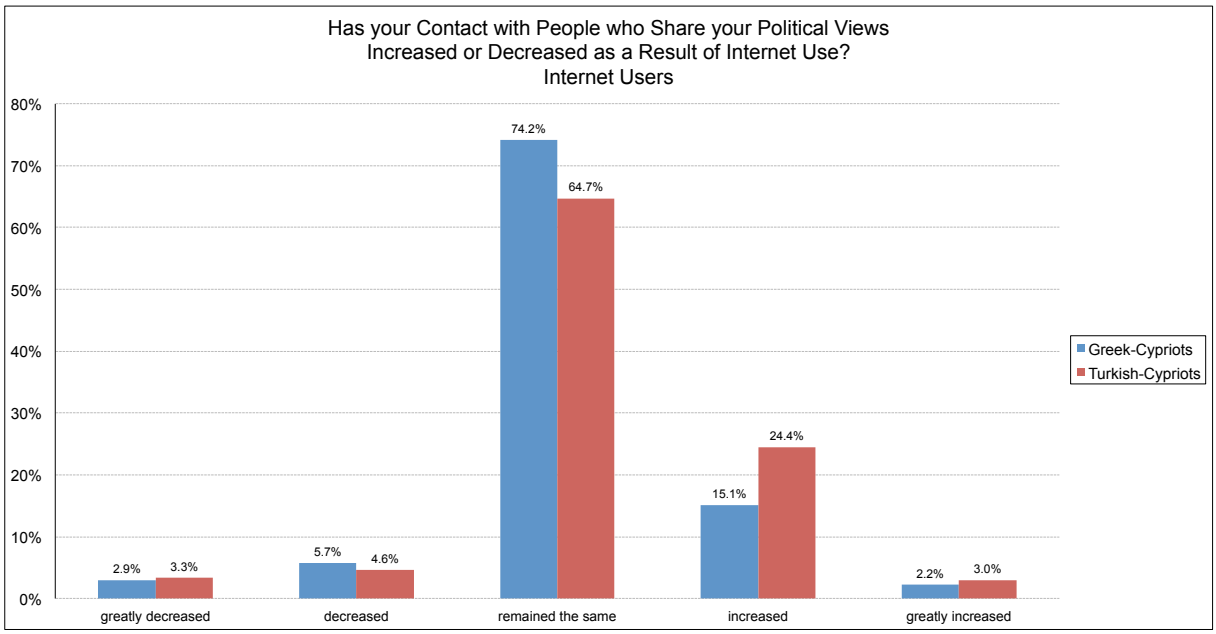

Figure 2.4.1.2. *Contact with people who share the same political views*

Figure 2.4.1.3 shows that most Cypriots do not think that the internet has had an impact on their contact with people with similar religious beliefs (84.4% of Greek-Cypriots and 77.9% of Turkish-Cypriots).

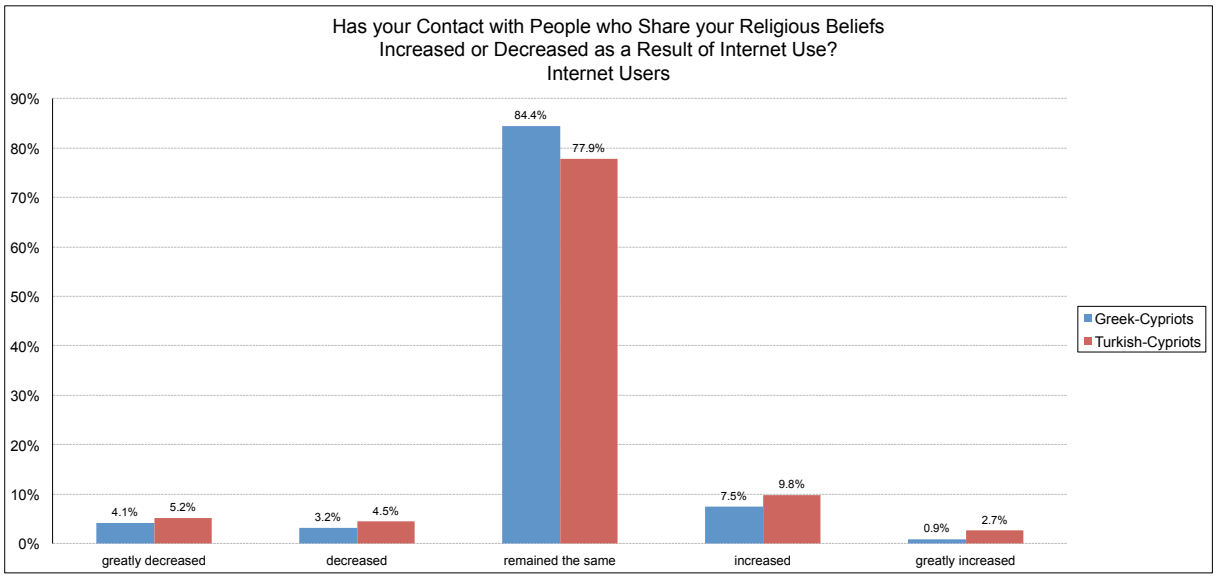

Figure 2.4.1.3. *Contact with people who share the same religious beliefs*

Greek-Cypriot users tend to believe that the internet had a somewhat positive impact on their professional contacts: 52.5% of Greek-Cypriot users feel that their internet activities helped them improve their professional relations, as opposed 12.5% of Turkish-Cypriot users. The majority of Turkish-Cypriots (77.9%) and slightly less than half of Greek-Cypriots feel that the internet has not affected their professional contacts (Figure 2.4.1.4).

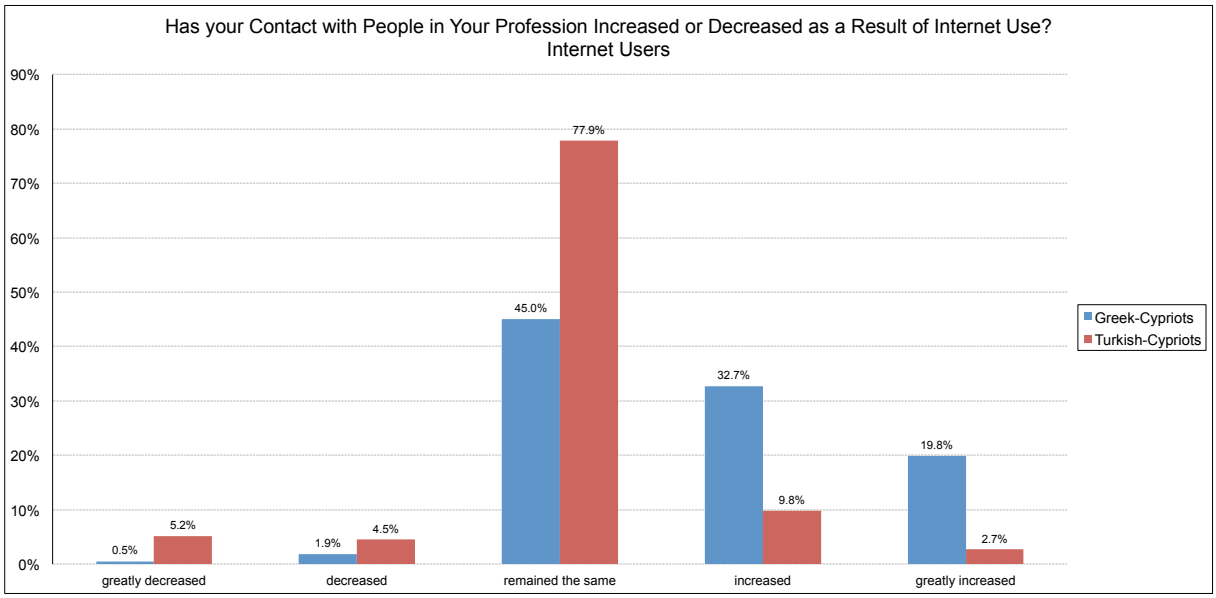

Figure 2.4.1.4. *Contact with colleagues*

Most Cypriots (59.6% of Greek-Cypriots and 46.7% of Turkish-Cypriots) feel that contact with family members has not undergone significant changes because of internet use. Still, 10.1% of Greek-Cypriots and 9.2% of Turkish-Cypriots feel that it has decreased and 30.1% of Greek-Cypriots and 44.0% of Turkish-Cypriots that it has increased (Figure 2.4.1.5).

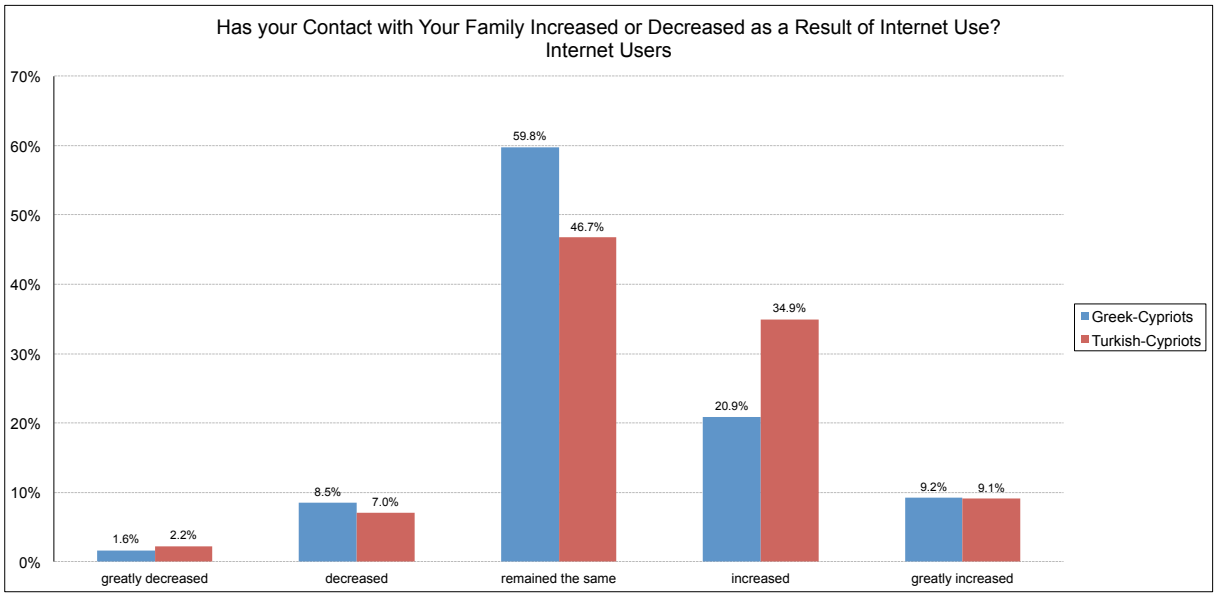

Figure 2.4.1.5. *Contact with family*

In both communities, the internet is perceived to have a positive impact on socializing with friends: 55.4% of Greek-Cypriots and 76.2% of Turkish-Cypriots feel that contact with their friends increased since connecting to the internet (Figure 2.4.1.6).

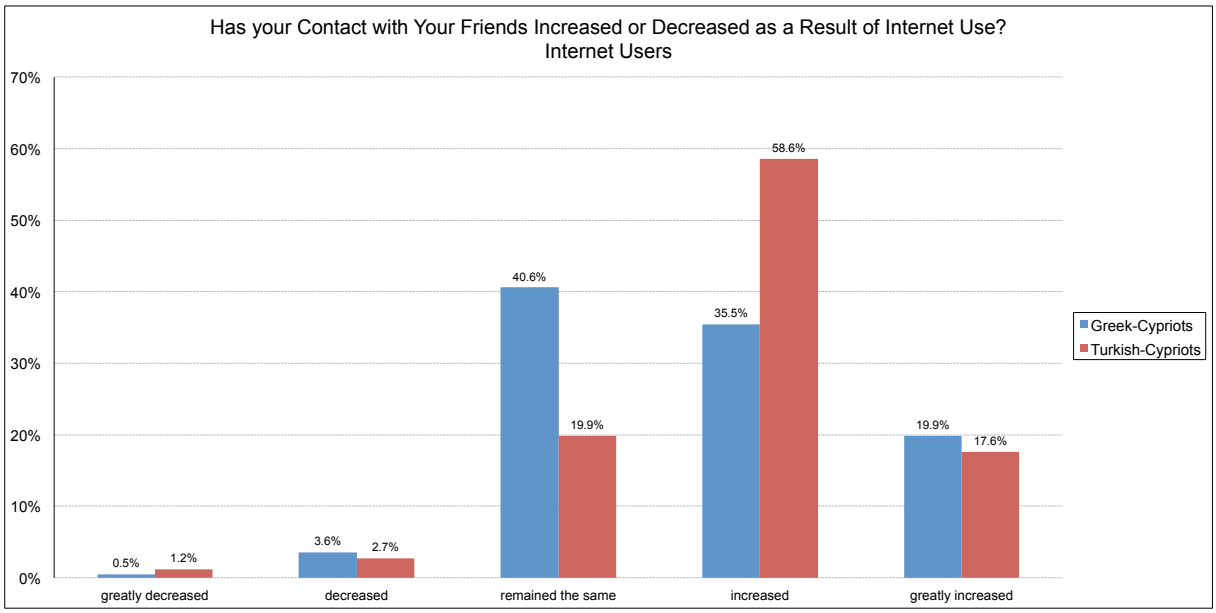

Figure 2.4.1.6. *Contact with friends*

2.4.2. Time Spent with Friends and Family

Comparison between the two communities reveals that Greek-Cypriot internet users devote remarkably more time to family and friends than Turkish-Cypriots. More specifically the percentage of Greek-Cypriot internet users who spend more than 14 hours per week with their families was 73.8% with the respective percentage of Turkish-Cypriots being 40.6% (Figure 2.4.2.1).

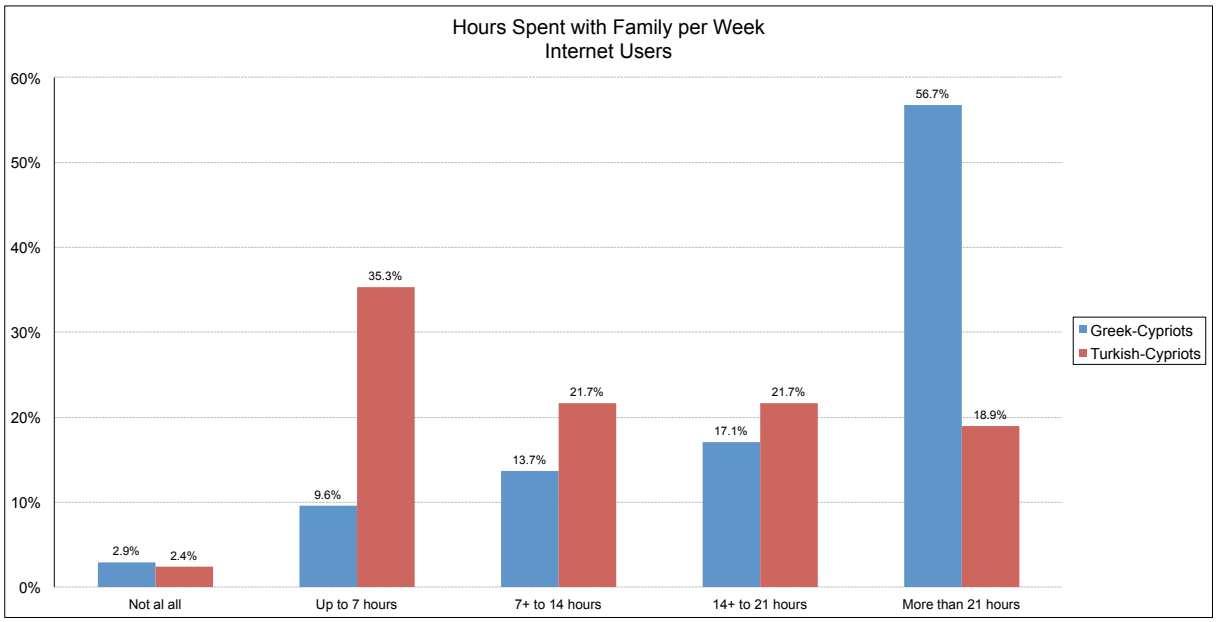

Figure 2.4.2.1. *Time spent with family*

A similar picture is found concerning the time internet users spend with their friends: Turkish-Cypriot internet users socialize less with friends compared to Greek-Cypriots, as the majority of Turkish-Cypriot internet users (53.8%) spend 7 hours or less with their friends every week. On the other hand, Greek-Cypriot users who spend more than 21 hours per week are about 10 percentage points more that Turkish-Cypriots (Figure 2.4.2.2).

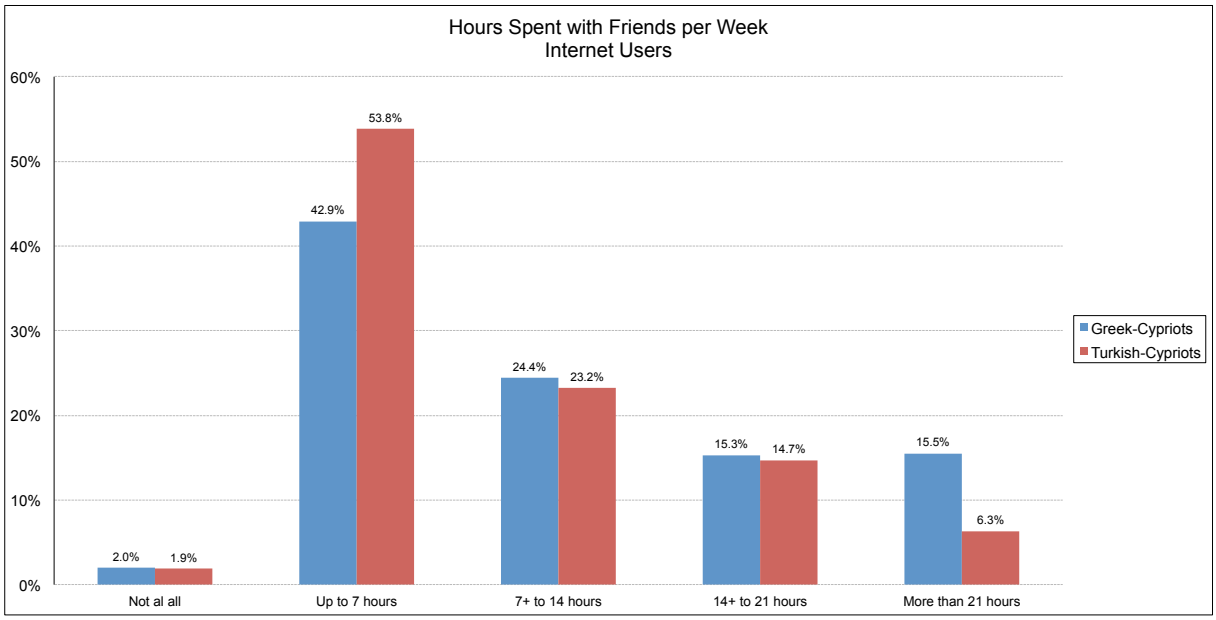

Figure 2.4.2.2. *Time spent with friends*

Comparing internet users and non-users in both communities, it is apparent that non-users spend more time with their families than users. More specifically, 65.6% of Greek-Cypriot non-users state that they spend 21 hours or more with their families as opposed to 56.7% of internet users. The respective percentages for Turkish-Cypriots were 30.8% and 18.9% (Figure 2.4.2.3).

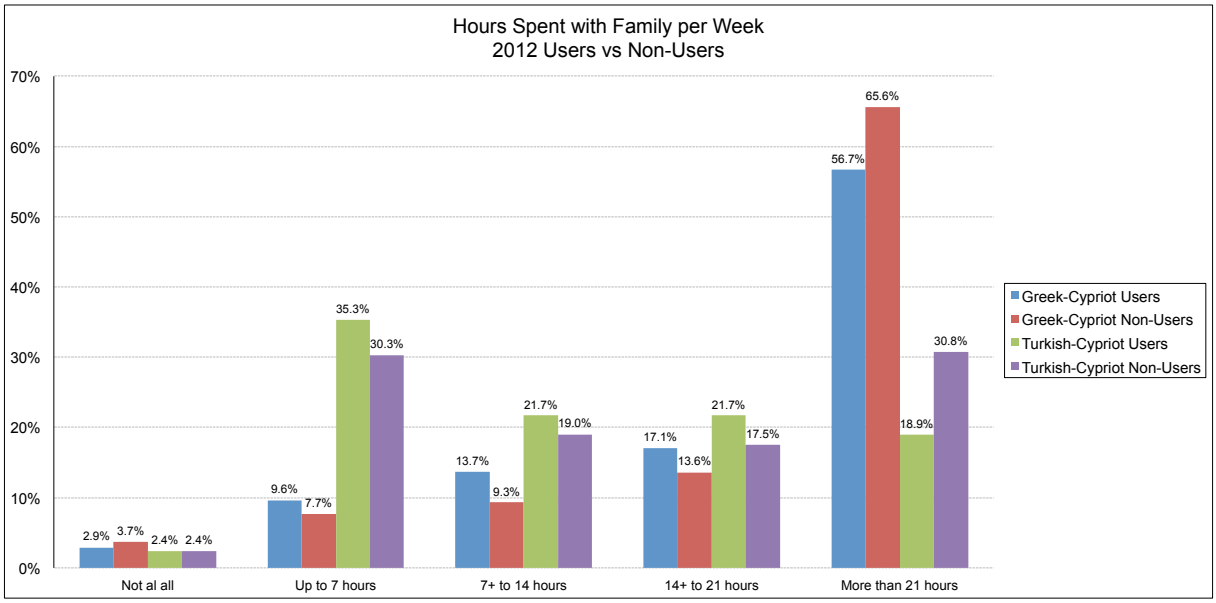

Figure 2.4.2.3. *Hour spent with family per week.*

Figure 2.4.2.4 presents a comparison of users and non-users in both communities with respect to time spent with friends. As noted in the first part or the report, Greek Cypriot users report spending more time with their friends than non-users. This is not the case with Turkish-Cypriot users. In fact, internet use in the Turkish-Cypriot community does not seem to affect the time Turkish-Cypriots spend with their friends.

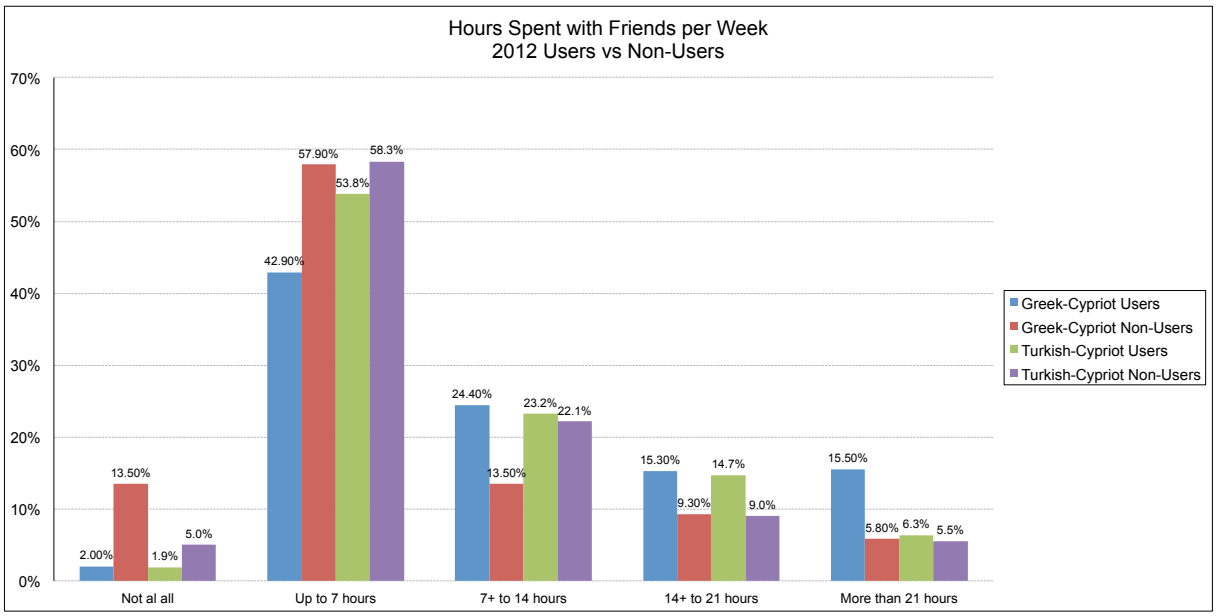

Figure 2.4.2.4. *Hours spent with friends per week*

2.4.3. Communication with Other People

Greek-Cypriots use email and send email attachments more often than Turkish-Cypriots, who seem to be significantly more active in blogging, posting pictures and videos online and participating in discussion boards. Turkish-Cypriots also use instant messaging and update their status in social media more often than Greek-Cypriots, while no important differences between the two communities are observed regarding participation in chat rooms and internet phone calls (Figures 2.4.3.1 to 2.4.3.11).

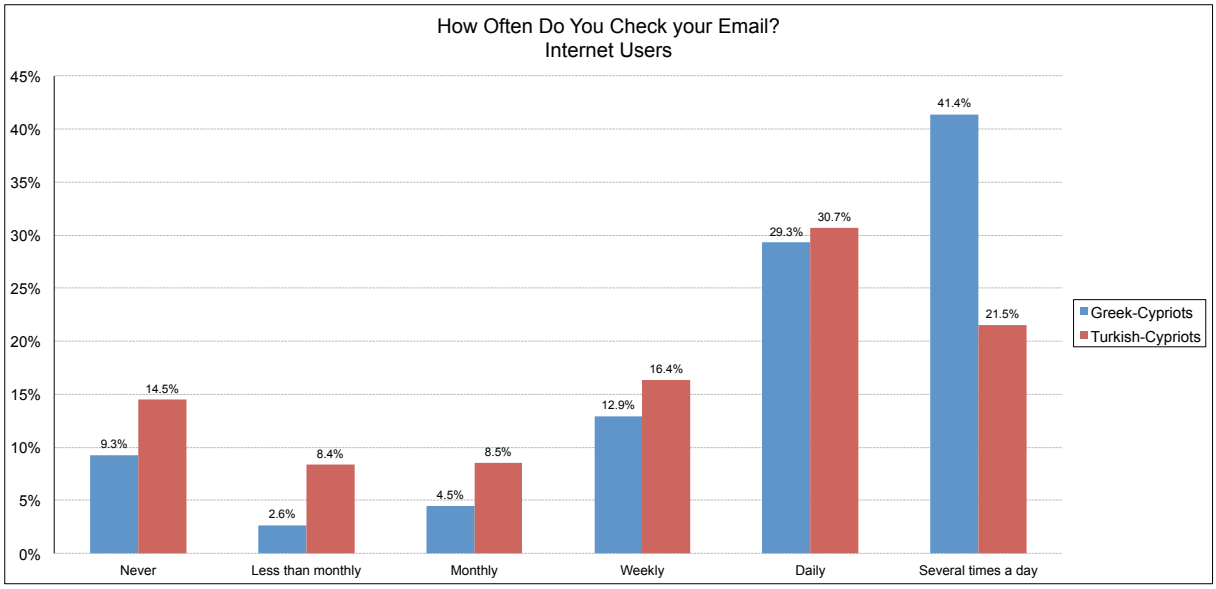

Figure 2.4.3.1. *E-mail use*

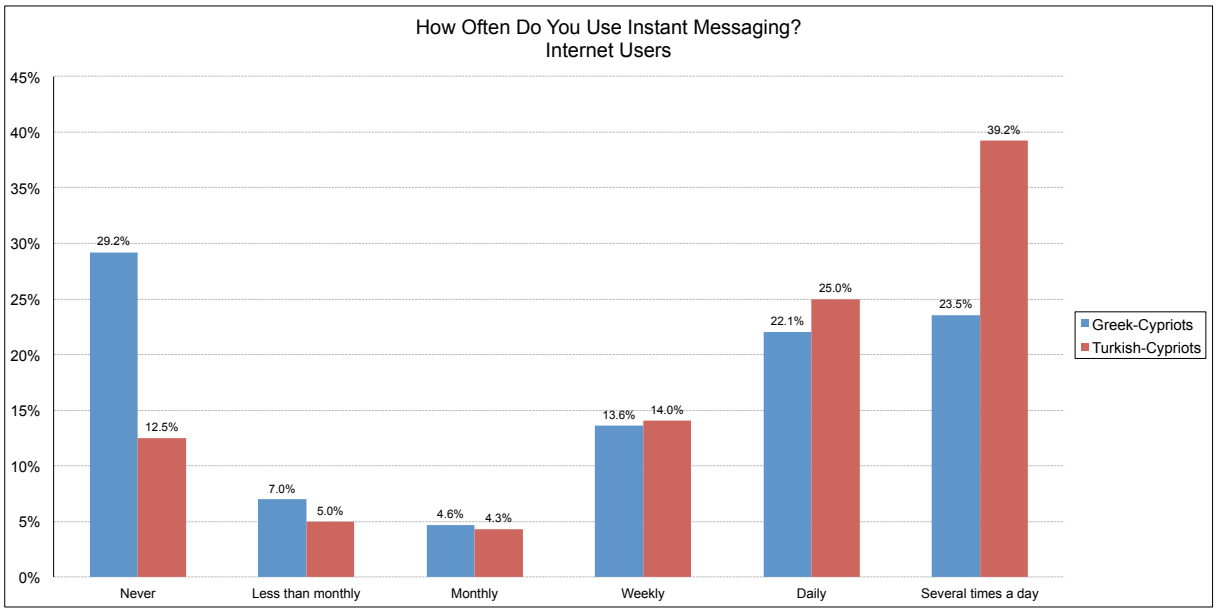

Figure 2.4.3.2. *Instant messaging*

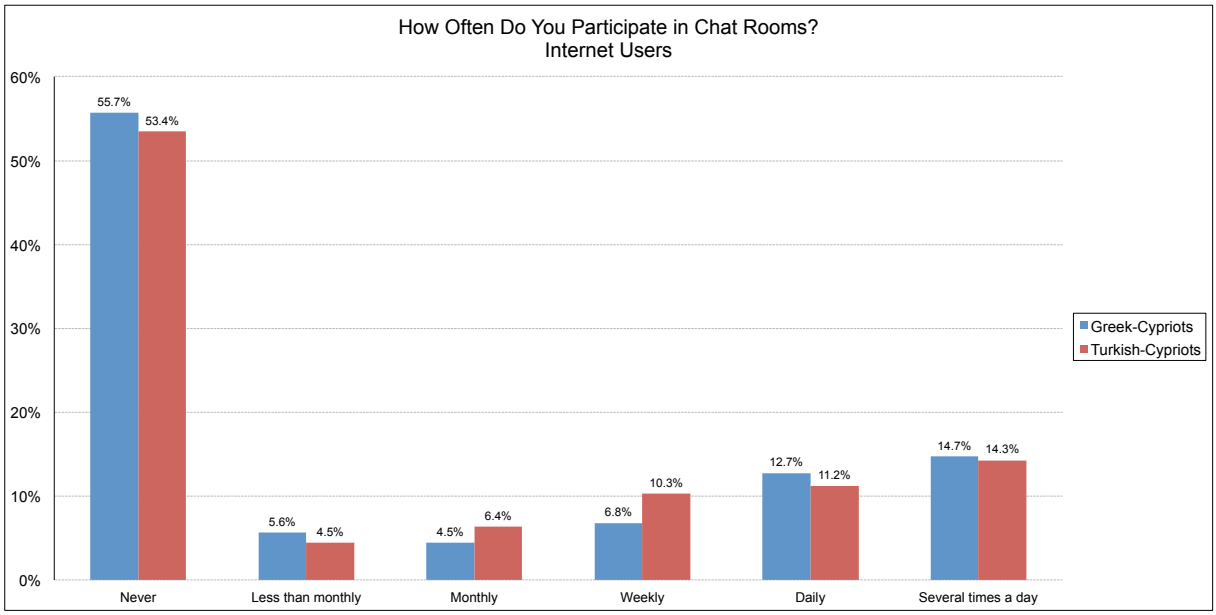

Figure 2.4.3.3. *Participation in chat rooms*

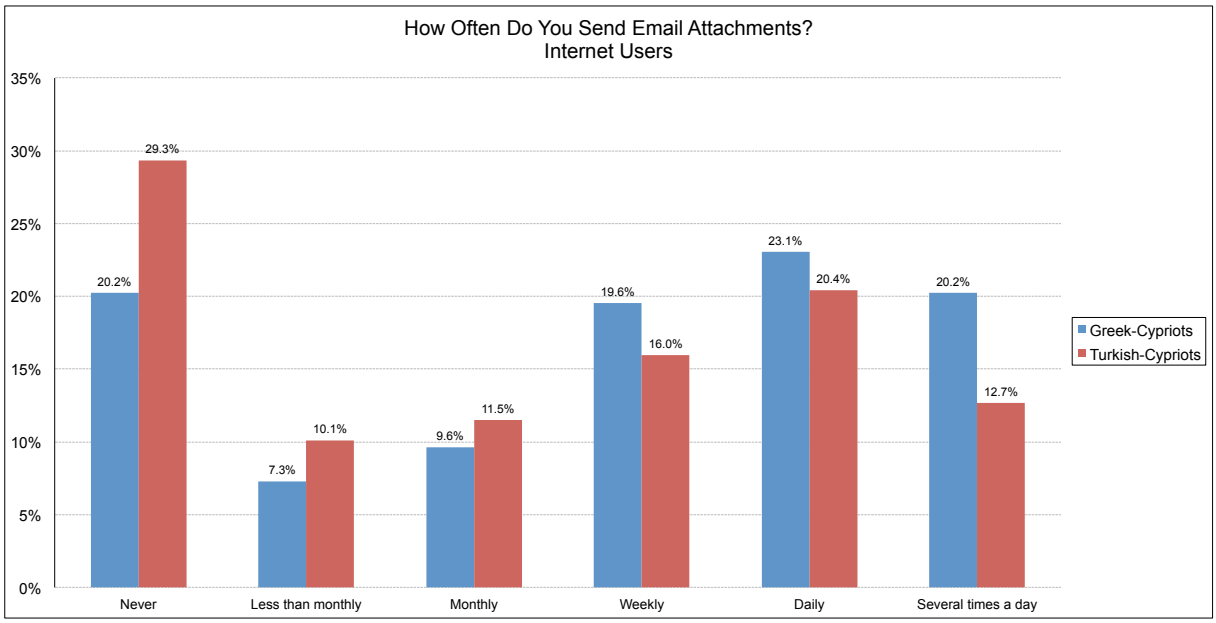

Figure 2.4.3.4. *Sending e-mail attachments*

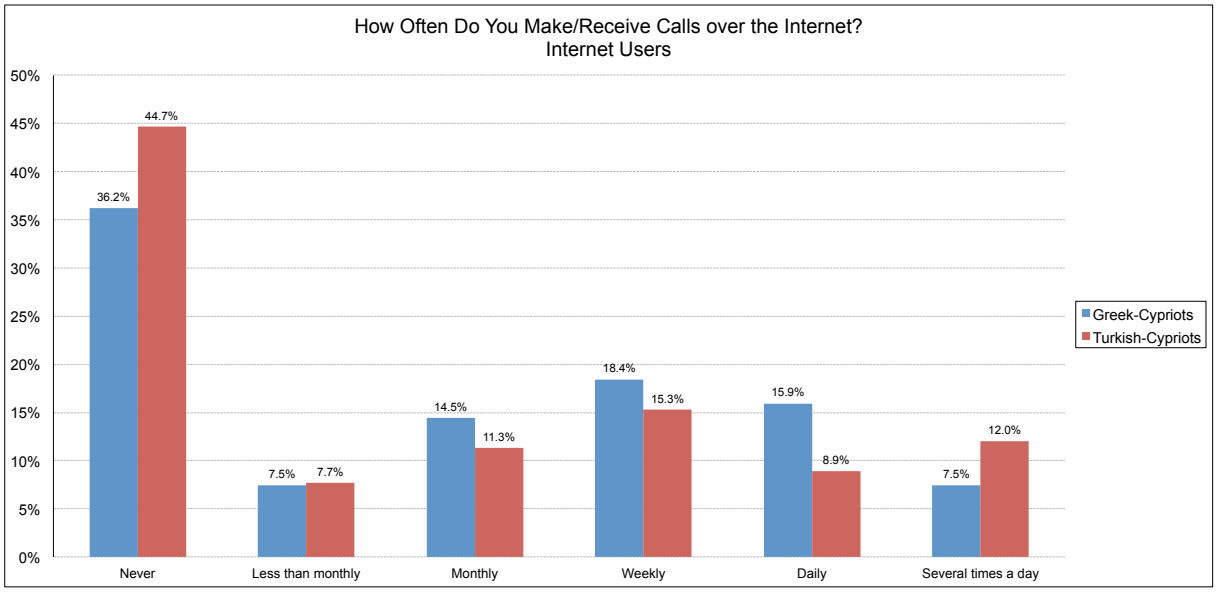

Figure 2.4.3.5. *Calls over the internet*

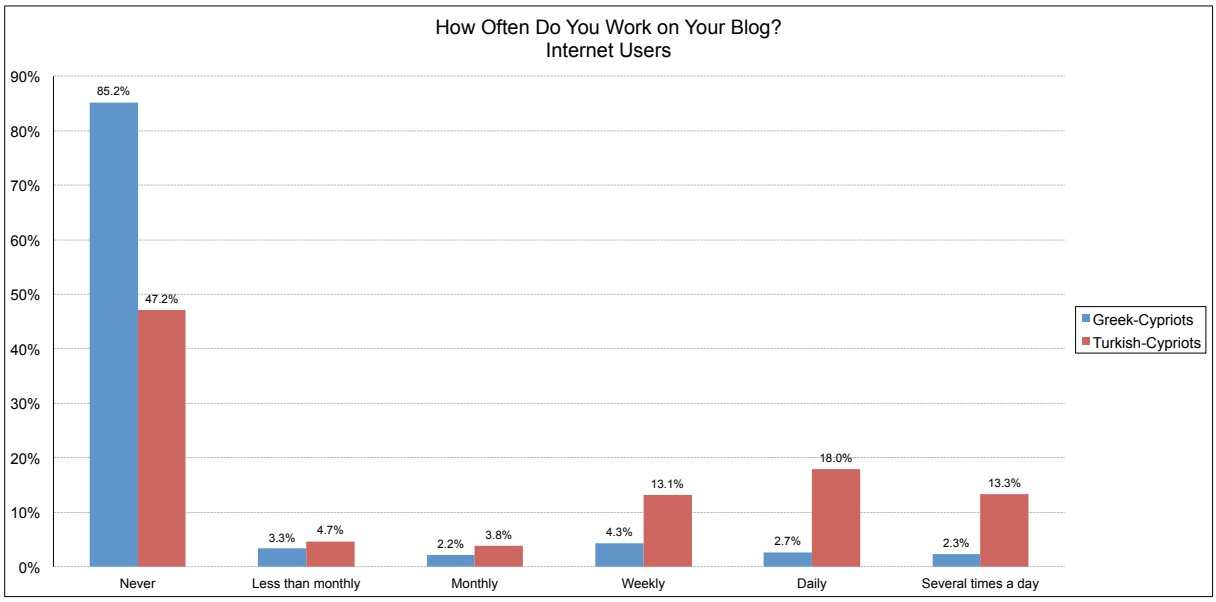

Figure 2.4.3.6. *Working on blogs*

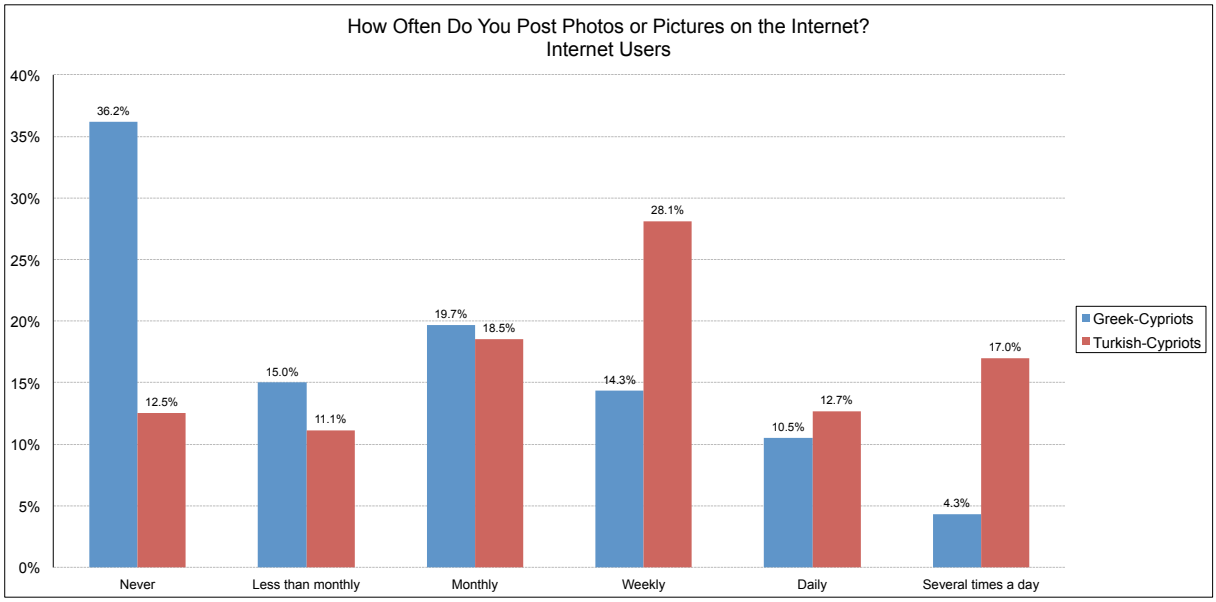

Figure 2.4.3.7. *Posting photos or pictures on the internet*

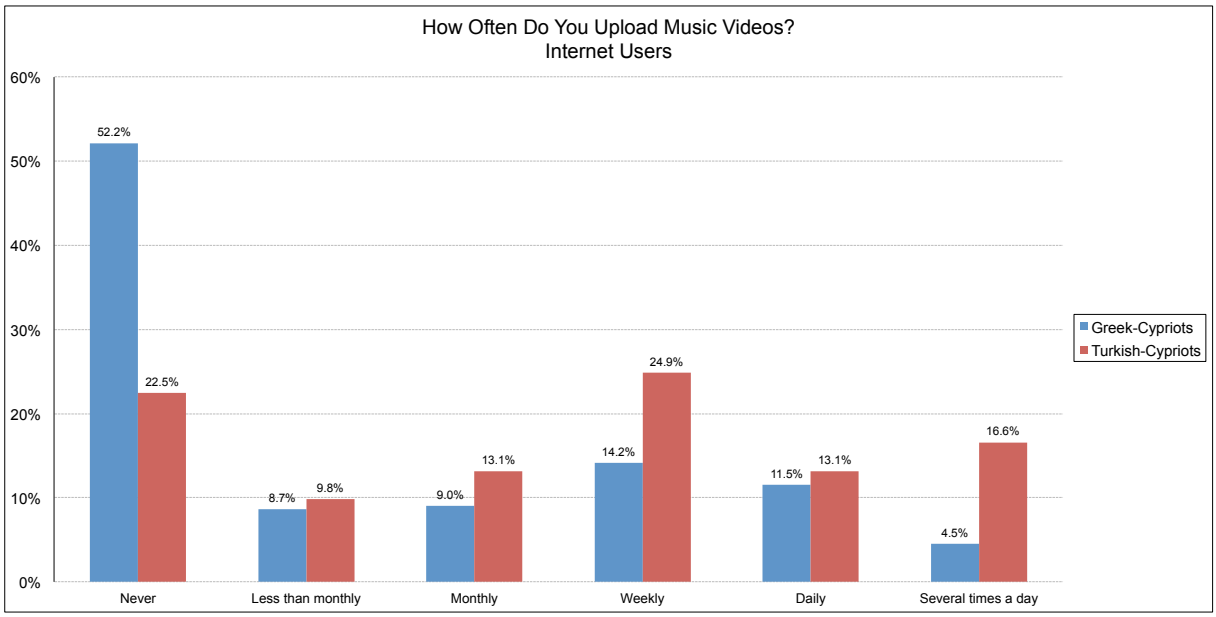

Figure 2.4.3.8. *Uploading music videos*

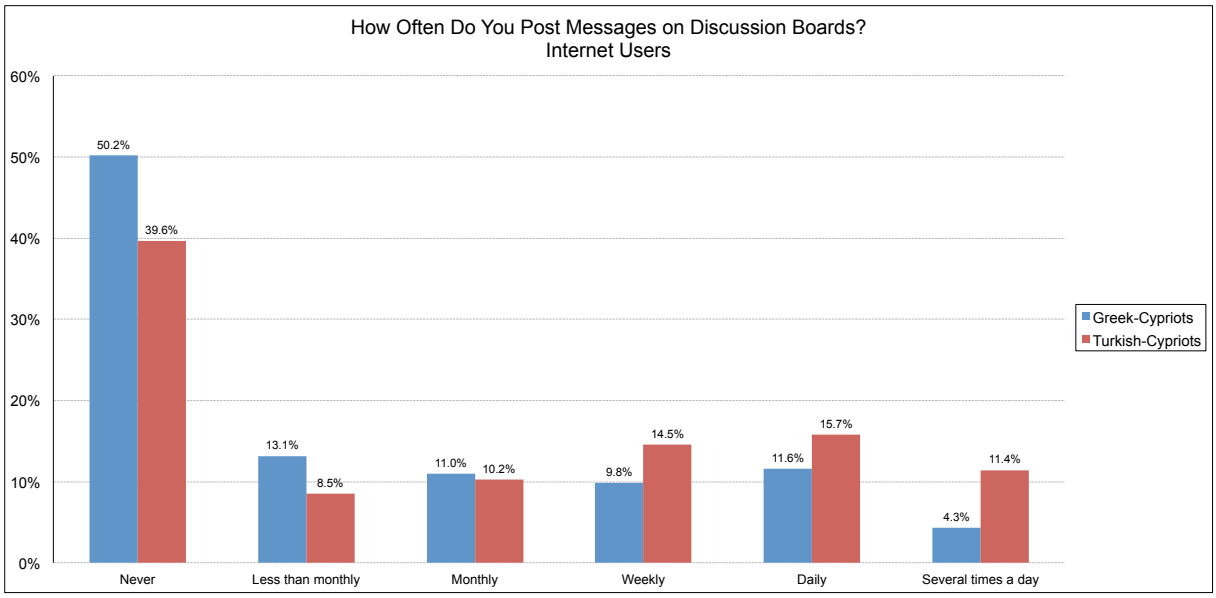

Figure 2.4.3.9. *Participation in discussion boards*

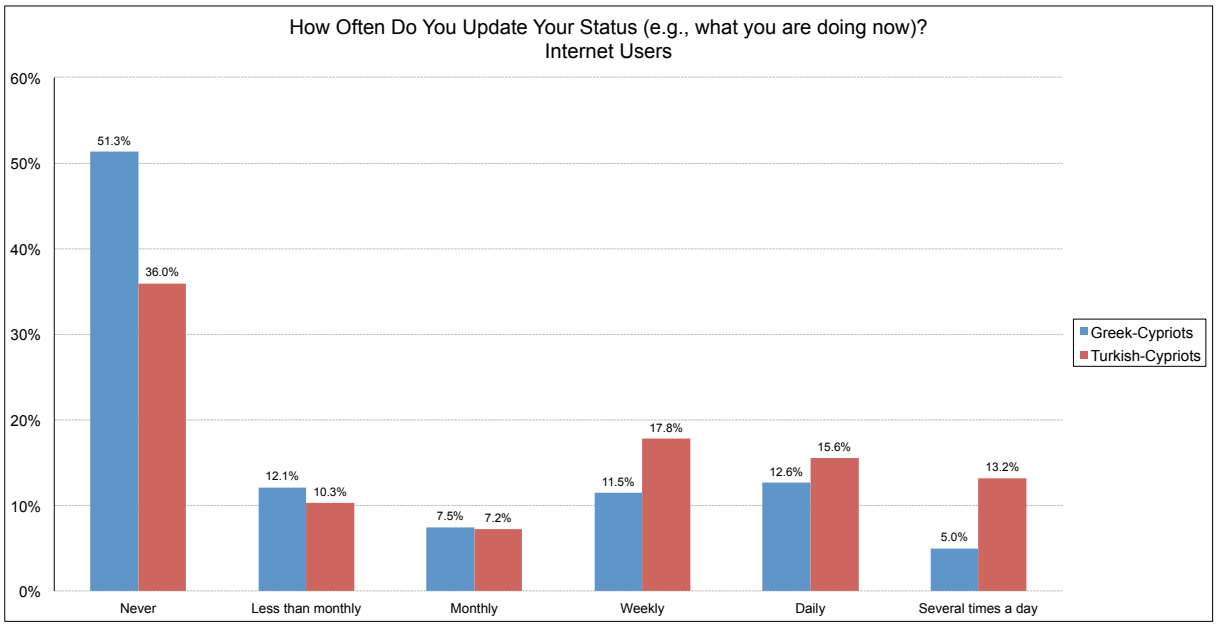

Figure 2.4.3.10. *Updating status*

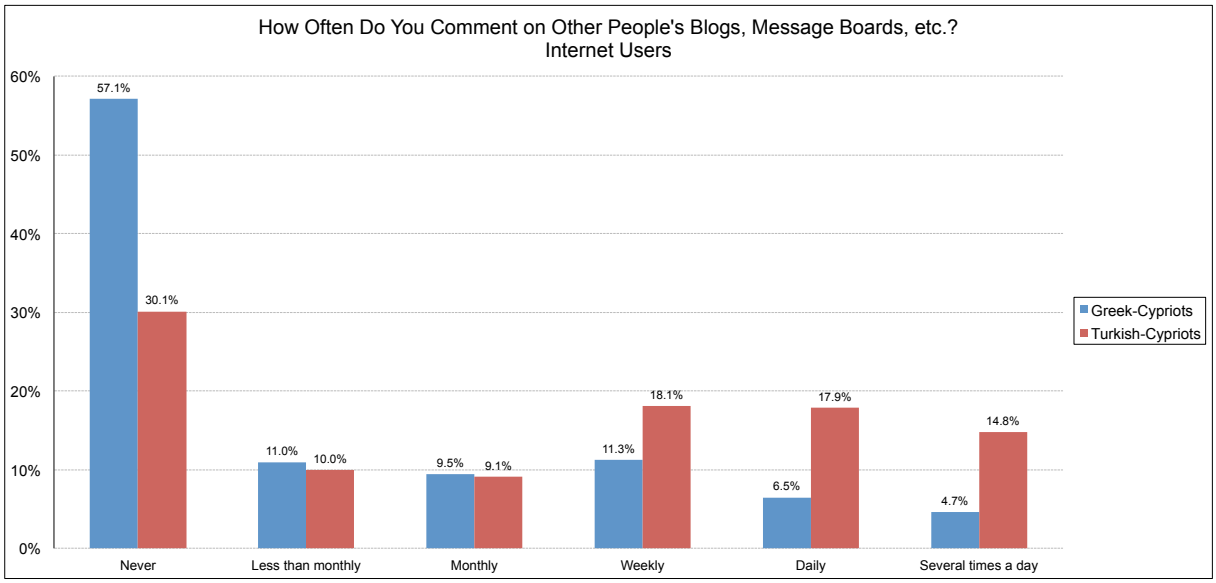

Figure 2.4.3.11. *Commenting on blogs and message boards*

2.4.4. Multitasking

Many Greek-Cypriot (41.6%) and Turkish-Cypriot users (40.1%) report that they multitask most of the time while online (Figure 2.4.4.1). Turkish-Cypriots seem to multitask more when they are online, as only 17.9% said that they never multitask, compared to 27.6% of Greek-Cypriots.

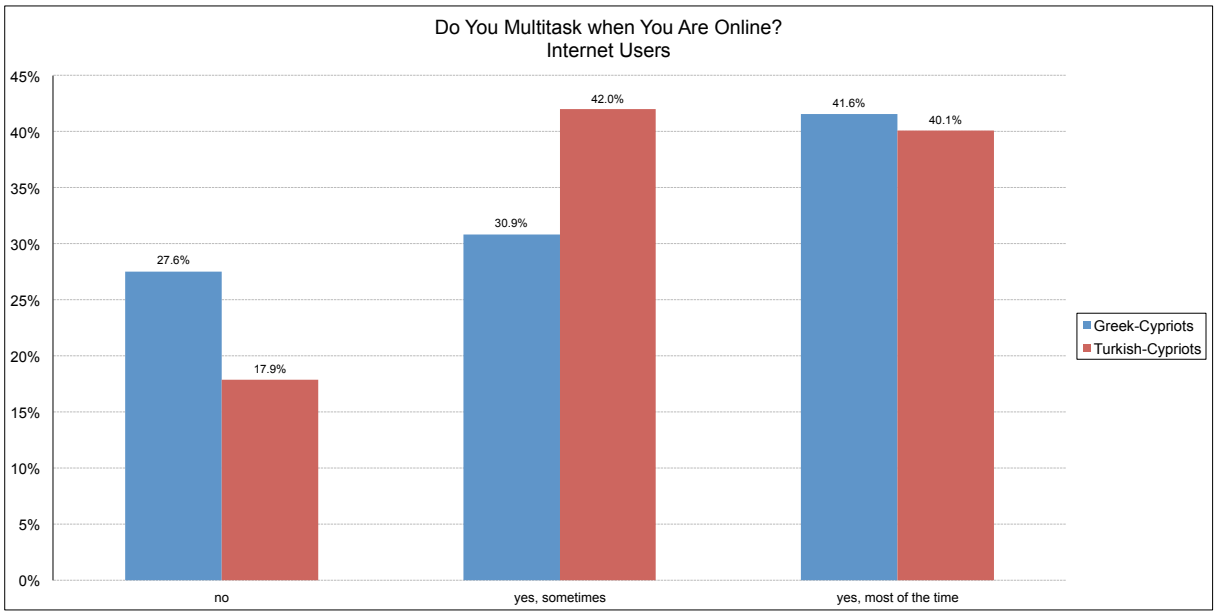

Figure 2.4.4.1. *Multitasking*

2.5. ONLINE ACTIVITIES

2.5.1. Information Related Online Activities

As shown in Figure 2.5.1.1, Greek-Cypriots use the internet on a daily basis in order to gather news information at a higher rate compared to Turkish-Cypriots (61.8% of Greek-Cypriots said that they use the internet at least once a day for news information, compared to 31.0% of Turkish-Cypriots).

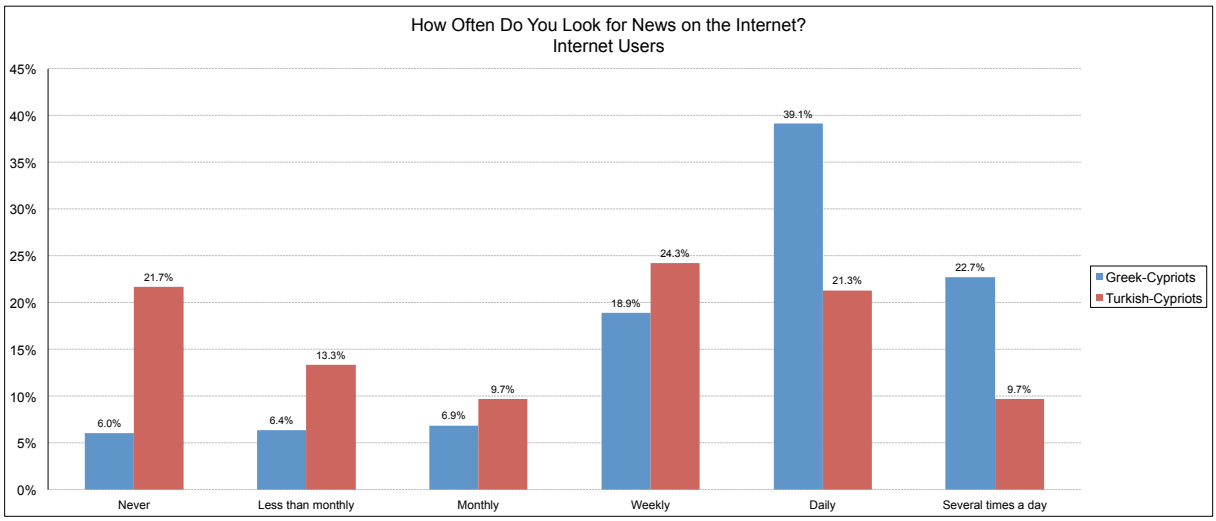

Figure 2.5.1.1. *Looking for news*

Even though searching for a job is not a very common activity, it seems that Greek-Cypriot internet users are more familiar with seeking employment online (Figure 2.5.1.2).

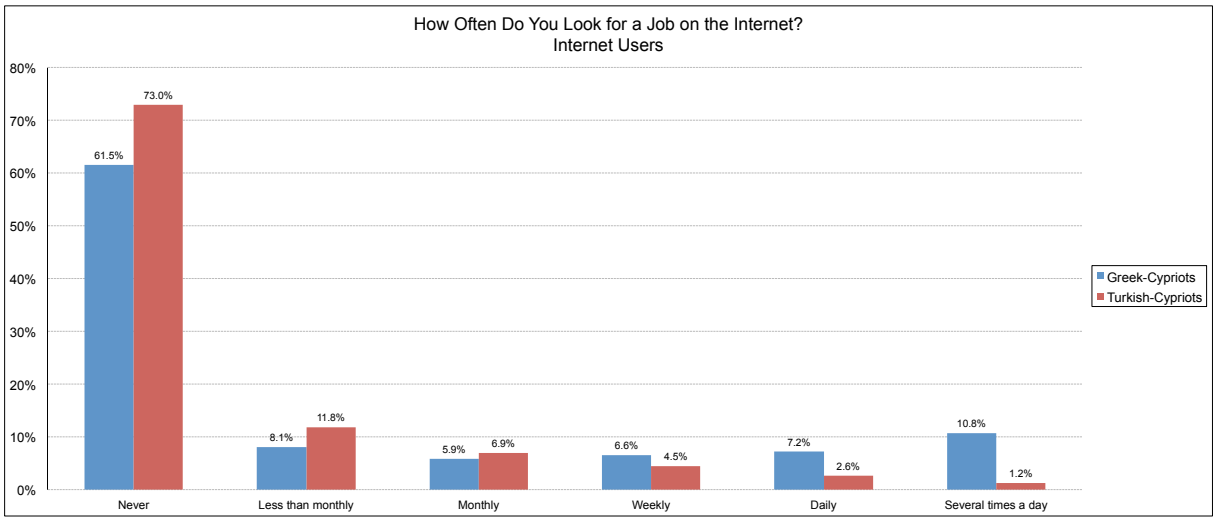

Figure 2.5.1.2. *Looking for a job*

Reading other people's blogs is more popular among Greek-Cypriot internet users: Greek-Cypriots read blogs at least one a week at a rate of 44.9%, compared to Turkish-Cypriots who report doing so at a rate of 21.1% (Figure 2.5.1.3).

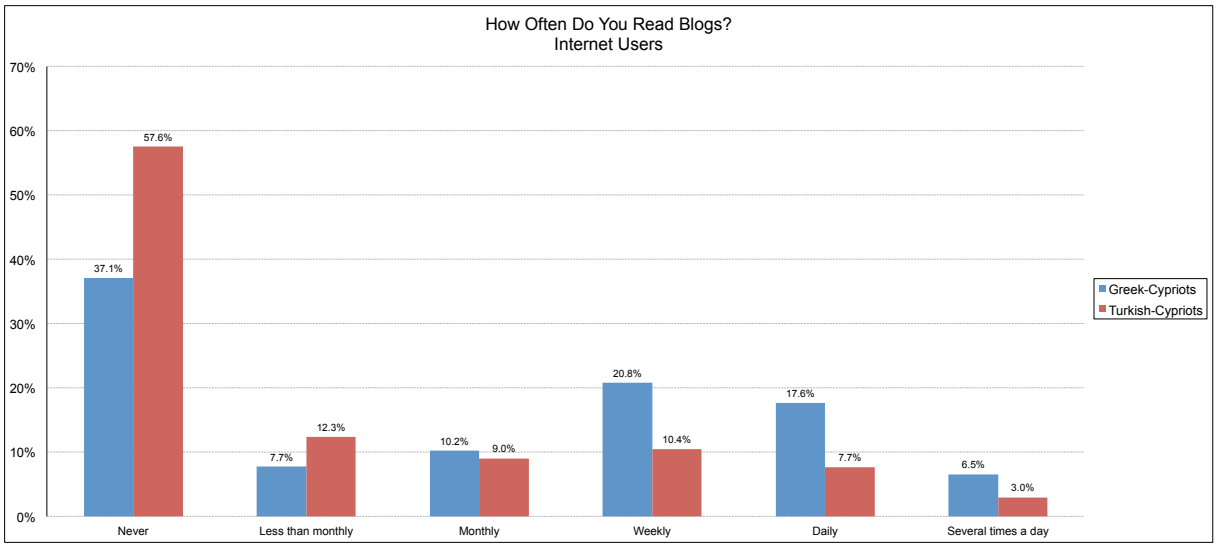

Figure 2.5.1.3. *Reading blogs*

A slight difference is also observed in the use of websites with humorous content: although almost half of the users in both communities never use the internet to search for humorous content, 34.6% of Greek-Cypriot users do that at least once a week, while the corresponding percentage of Turkish-Cypriots is only 22.0% (Figure 2.5.1.4).

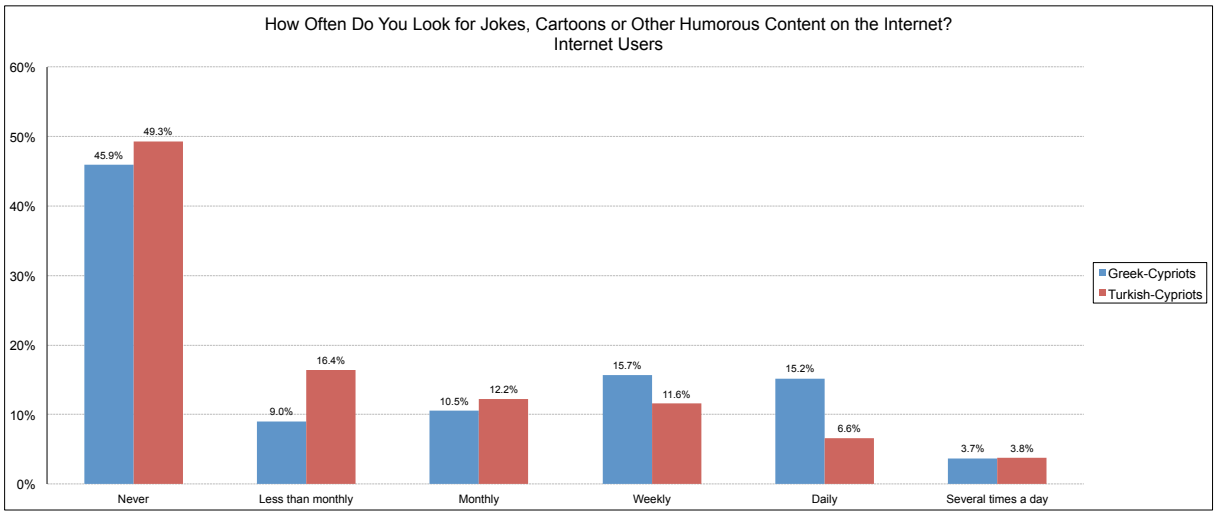

Figure 2.5.1.4. *Looking for humorous content*

No apparent differences were noted between the two communities, regarding the search for travel information (Figure 2.5.1.5).

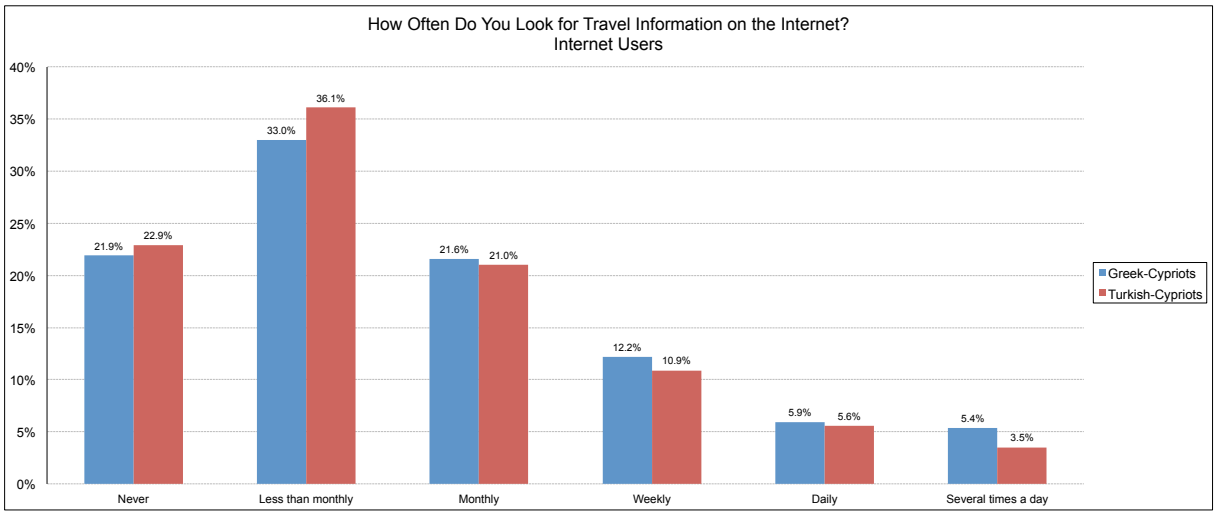

Figure 2.5.1.5. *Looking for travel information*

Greek-Cypriots seem to use the internet for health information slightly more frequently that Turkish-Cypriot users (Figure 2.5.1.6).

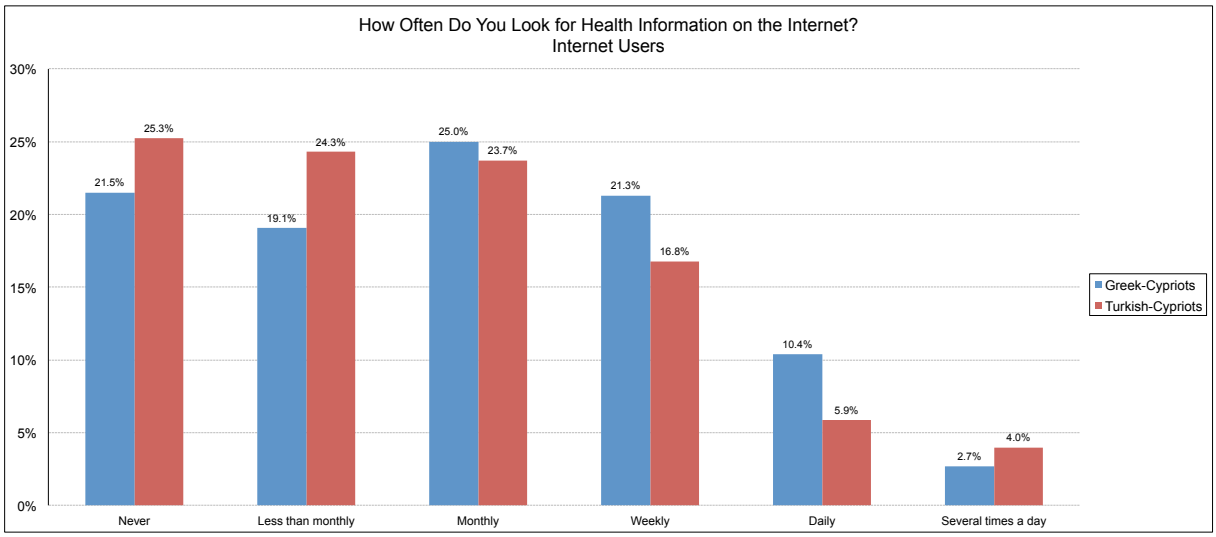

Figure 2.5.1.6. *Looking for health information*

Figure 2.5.1.7 shows that Turkish-Cypriot users look for consumer information less frequently than Greek-Cypriots.

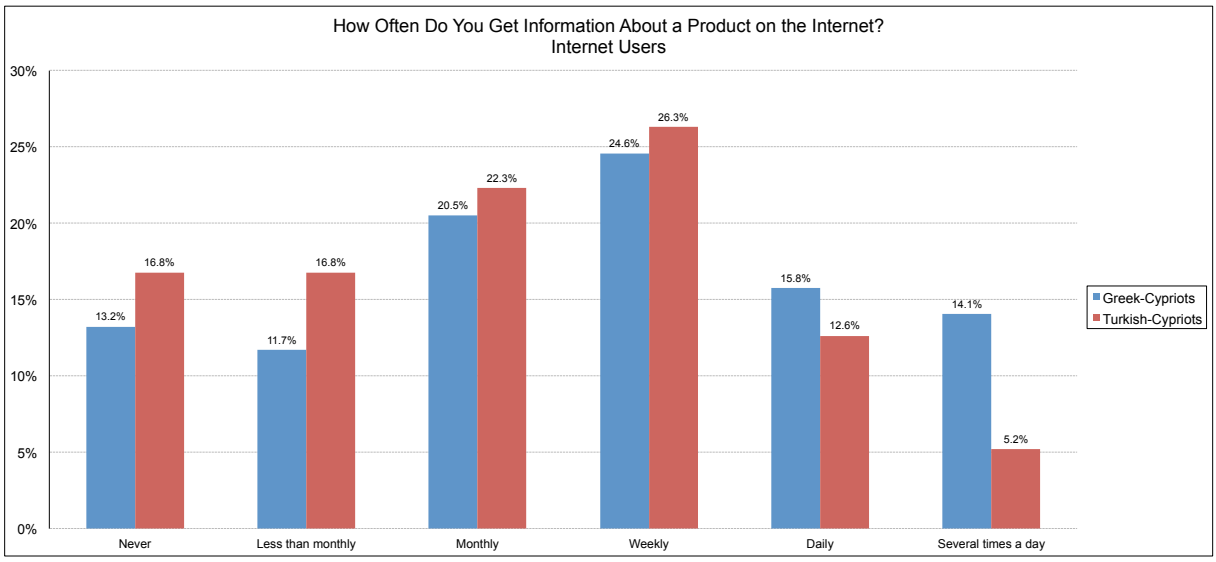

Figure 2.5.1.7. *Getting information about a product*

2.5.2. Online Transactions

Greek-Cypriots report buying things online more often than Turkish-Cypriots (Figure 2.5.2.1). It is noted that only 34.7% of Greek-Cypriot users report never buying things online, compared to 53.3% of Turkish-Cypriot users.

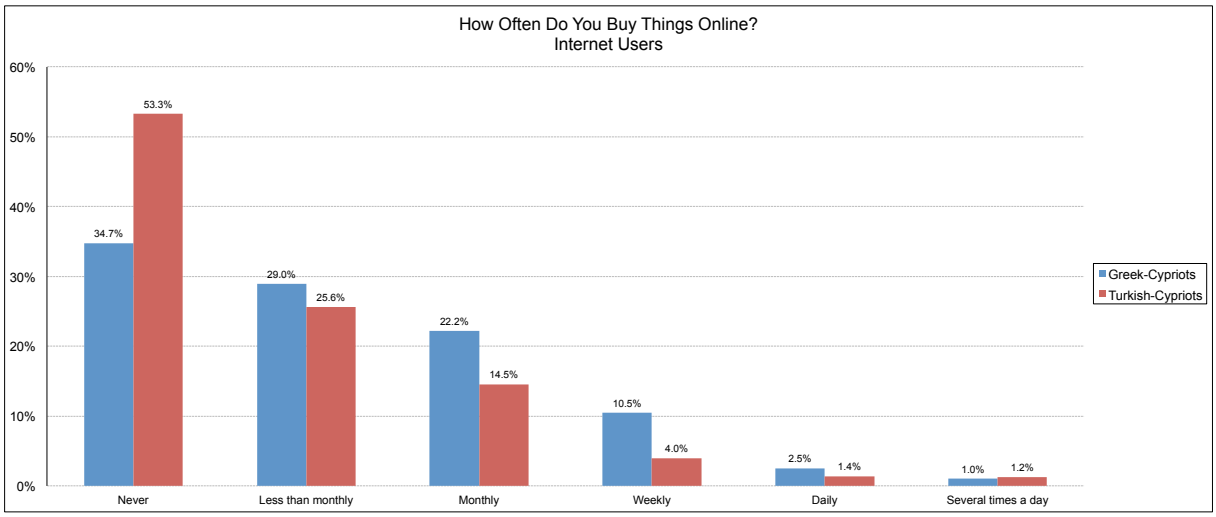

Figure 2.5.2.1. *Buying online*

Turkish-Cypriots use the internet less frequently than Greek-Cypriots for online transactions, such as paying bills (Figure 2.5.2.2), and for internet banking services (Figure 2.5.2.3), while in both communities online investment transactions are not very popular (Figure 2.5.2.4).

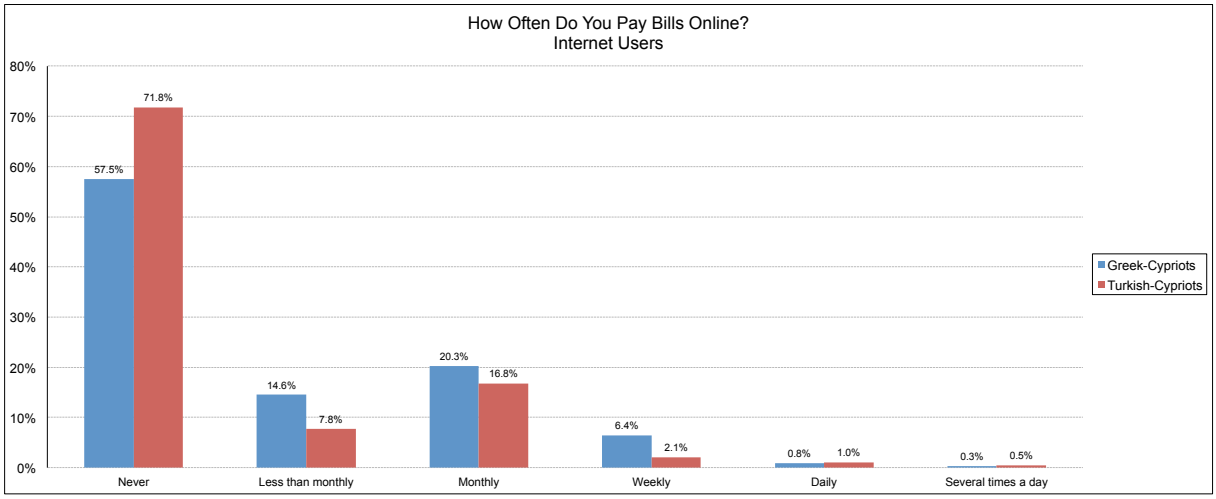

Figure 2.5.2.2. *Paying bills*

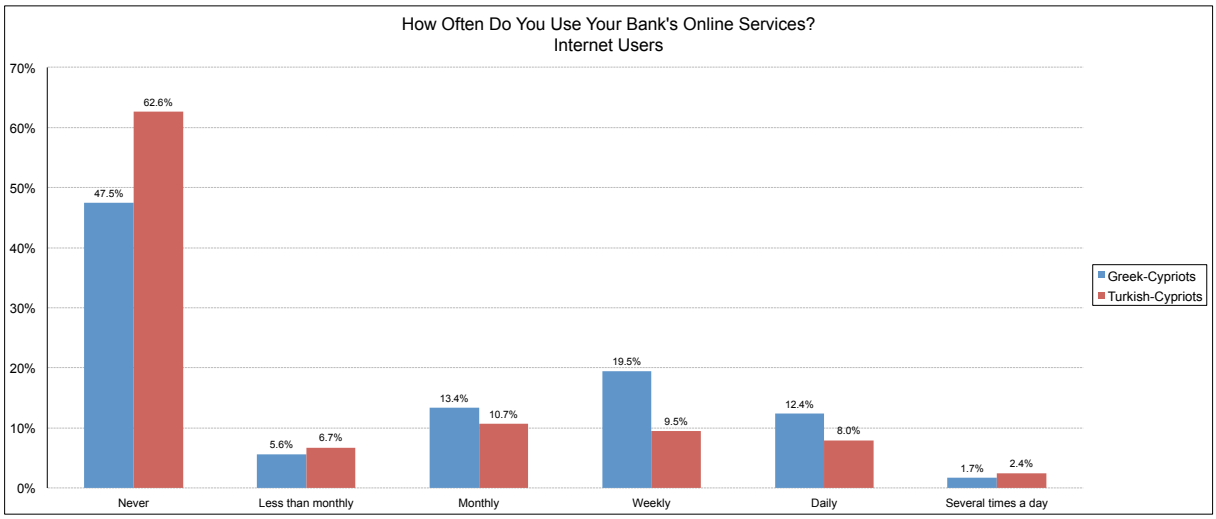

Figure 2.5.2.3. *Online banking*

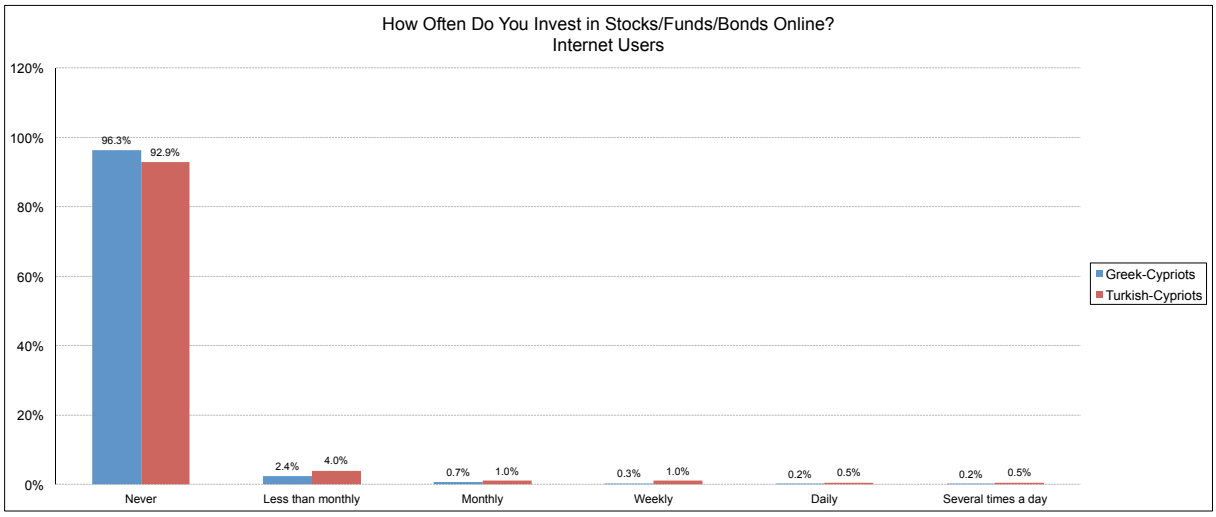

Figure 2.5.2.4. *Investing online*

Online travel bookings are more common; the majority of internet users have used the internet to arrange some travel reservation, although most users make travel reservations less frequently than once a month. Greek-Cypriots make online travel arrangements slightly more often (Figure 2.5.2.5).

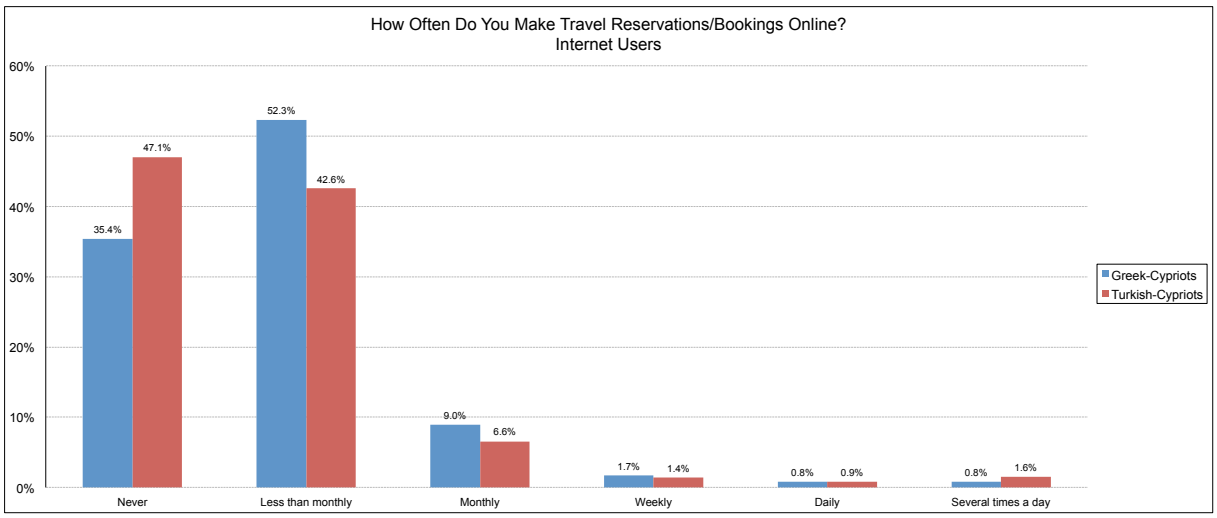

Figure 2.5.2.5. *Making travel arrangements*

2.5.3. Security Concerns

Overall, Greek-Cypriots are more skeptical than Turkish-Cypriots about the safety of their online transactions. While 47.6% of Greek-Cypriot internet users are very or extremely concerned about the online security of their credit card information, the respective percentage of Turkish-Cypriots is only 24.1%. At the same time, the percentage of Turkish-Cypriots who seem to feel no concern at all about the security of their online transactions is higher than the corresponding percentage of Greek-Cypriots by 6.2 points (Figure 2.5.3.1).

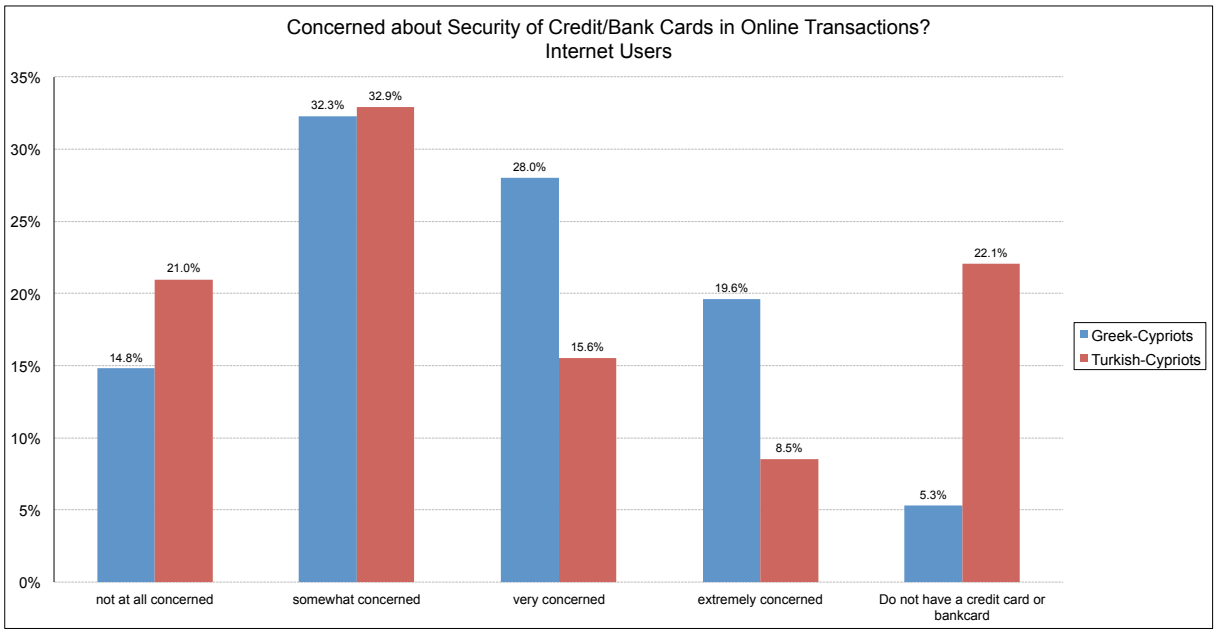

Figure 2.5.3.1. *Concerns about security of online transactions*

2.5.4. Online Entertainment

Turkish-Cypriot users use the internet for playing games (Figure 2.5.4.1) more often than do Greek-Cypriots, who use it more frequently for downloading music (Figure 2.5.4.2) and videos (Figure 2.5.4.3). Browsing (Figure 2.5.4.7) is by far the most popular activity in both communities, whereas visiting religious websites (Figure 2.5.4.4), betting (Figure 2.5.4.6) and looking for sexual content (Figure 2.5.4.8) remain relatively infrequent (again, the latter could be misleading as some users may feel uncomfortable to disclose this information). Social networking activities (Figure 2.5.4.9) and listening to online stations (Figure 2.5.4.5) are also more popular among the Greek-Cypriot community.

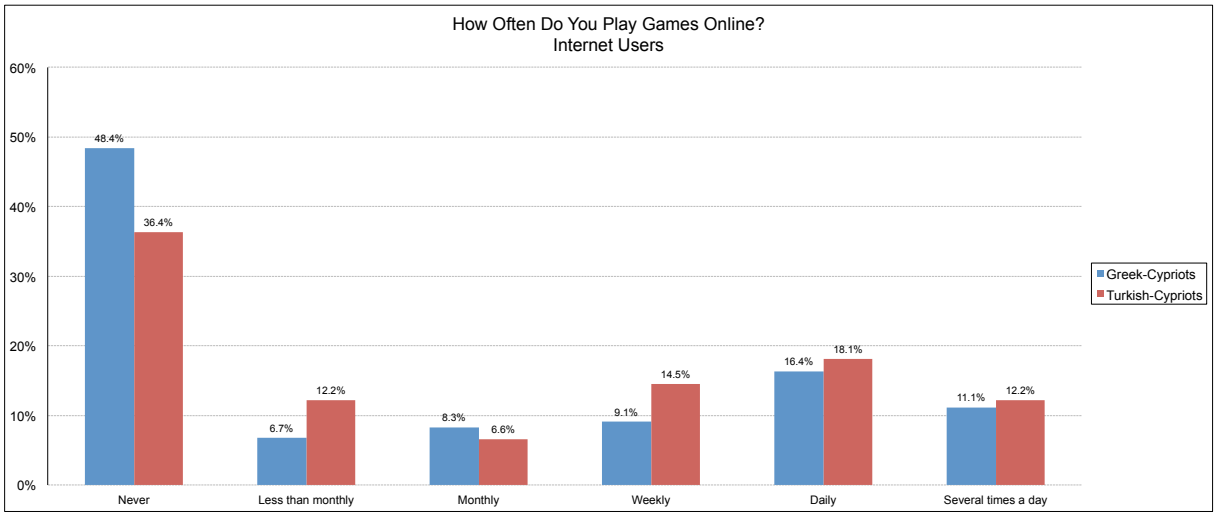

Figure 2.5.4.1. *Playing games*

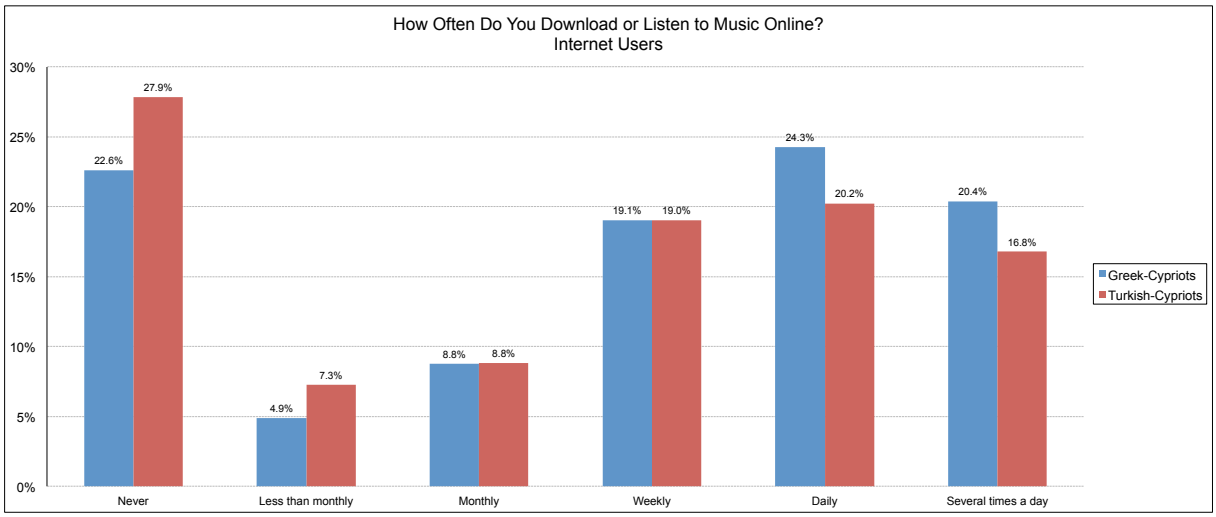

Figure 2.5.4.2. *Online music*

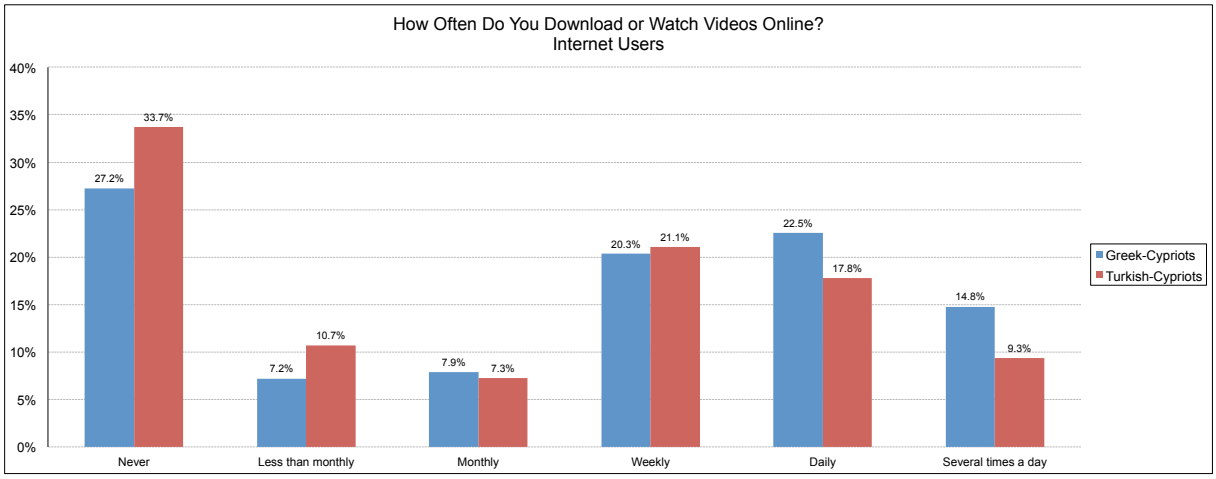

Figure 2.5.4.3. *Online videos*

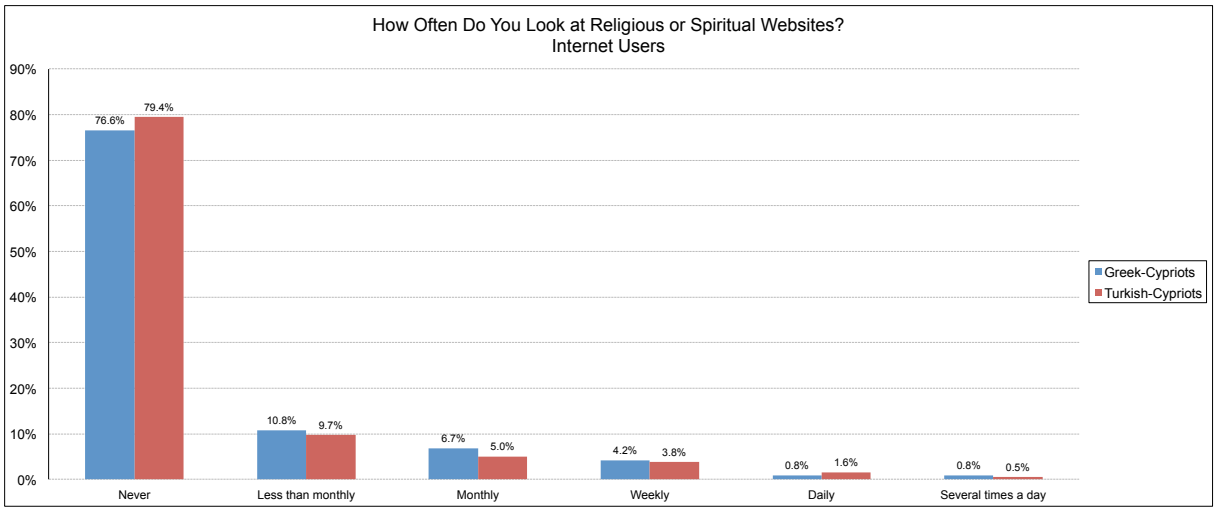

Figure 2.5.4.4. *Religious sites*

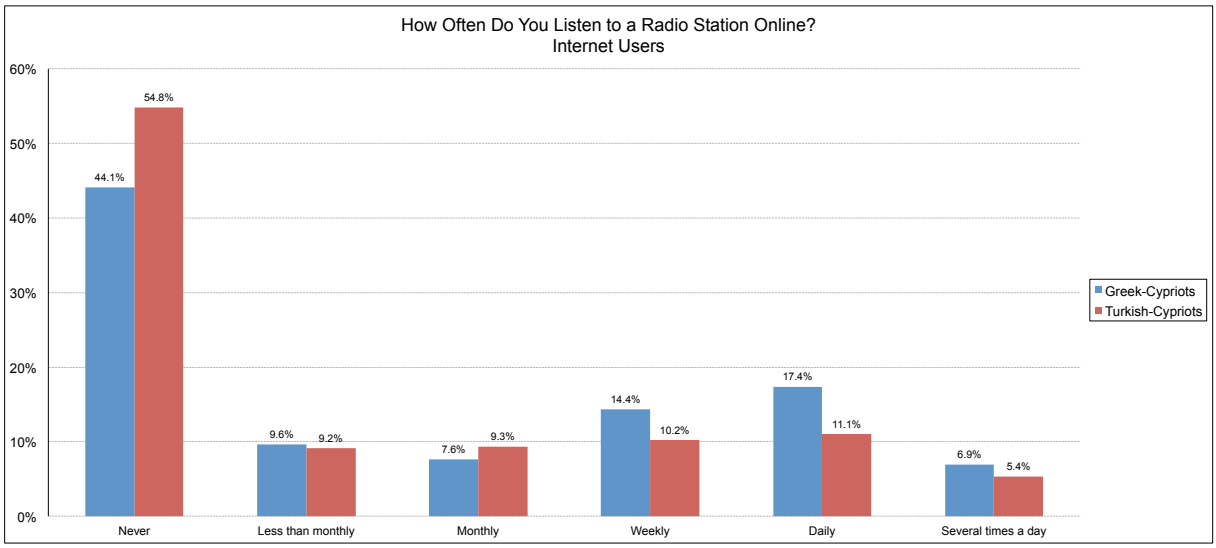

Figure 2.5.4.5. *Online radio*

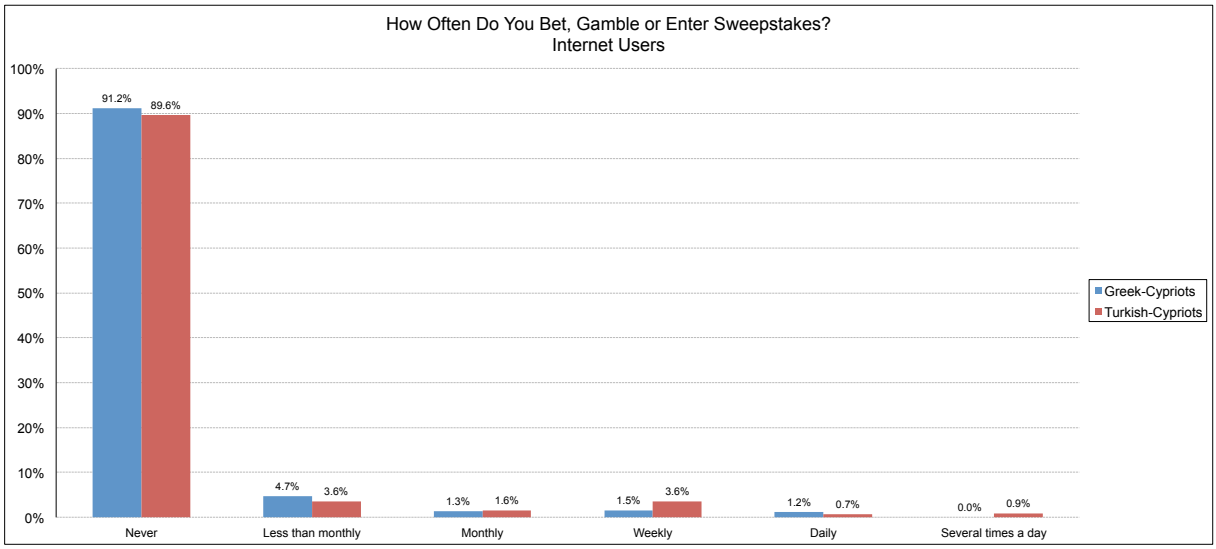

Figure 2.5.4.6. *Betting and gambling online*

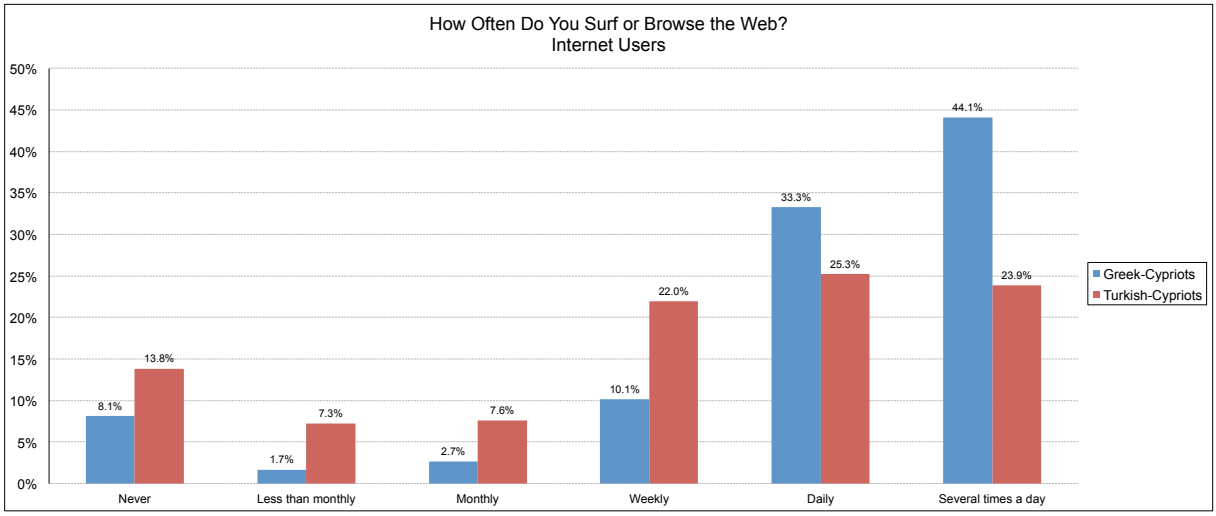

Figure 2.5.4.7. *Surfing the web*

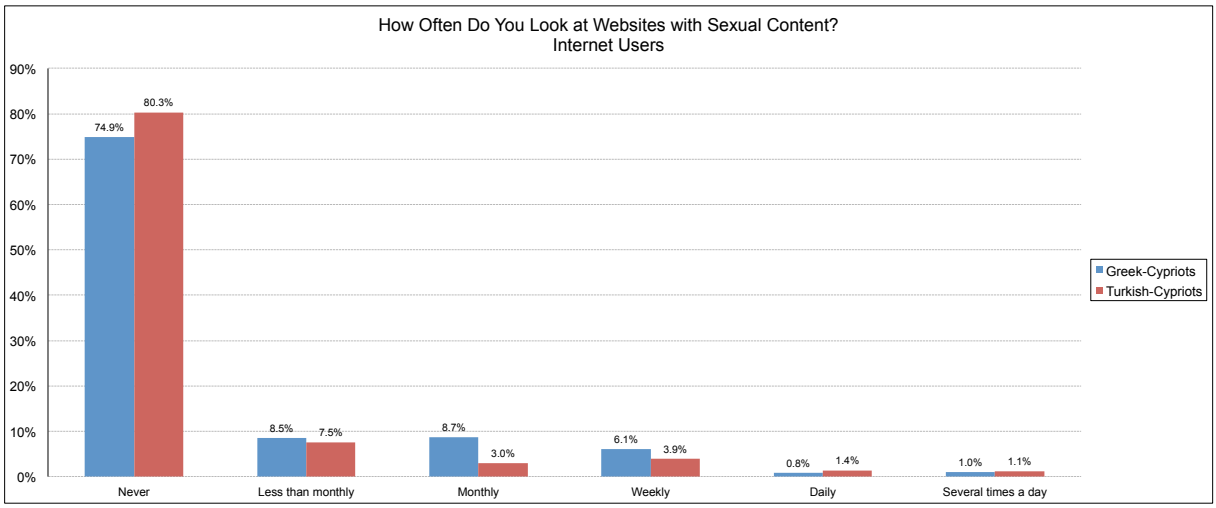

Figure 2.5.4.8. *Online sexual content*

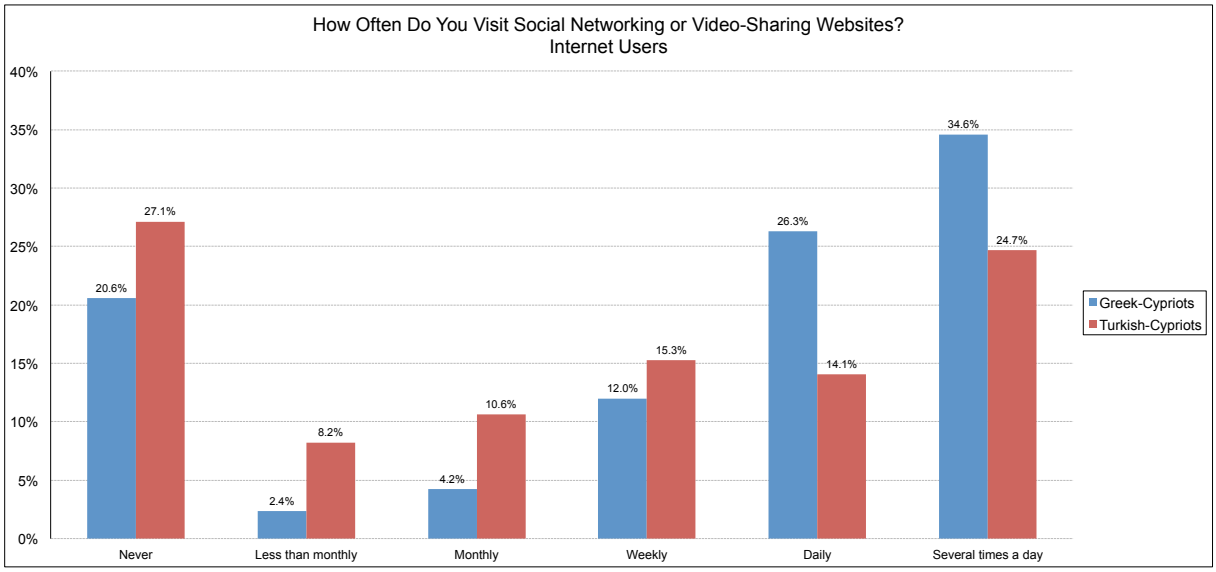

Figure 2.5.4.9. *Social networking sites*

2.5.5. Online Learning

Although the two communities are about equally involved in using the internet to retrieve school-related information (Figure 2.5.5.3), Greek-Cypriots tend to use the internet more than Turkish-Cypriots to look up word definitions (Figure 2.5.5.1) and for fact checking (Figure 2.5.5.2). The involvement of both communities in distance learning activities remains infrequent (Figure 2.5.5.4).

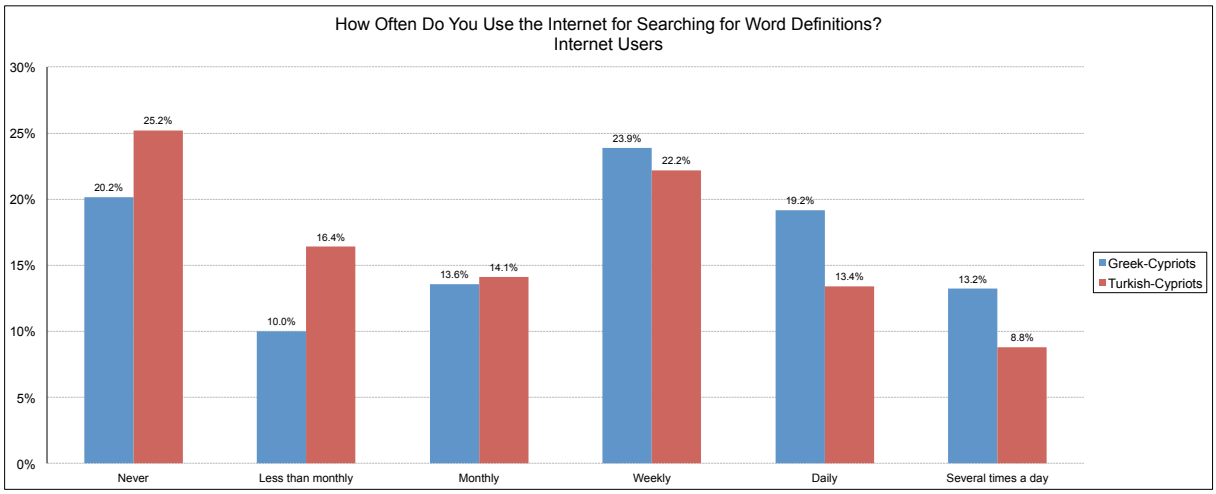

Figure 2.5.5.1. *Online learning - word definitions*

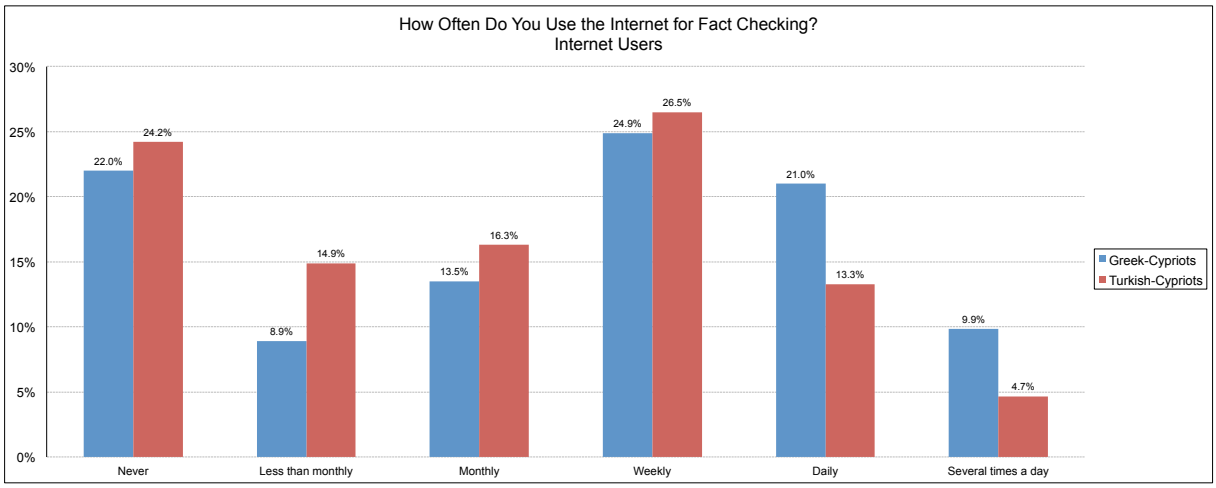

Figure 2.5.5.2. *Online learning – fact checking*

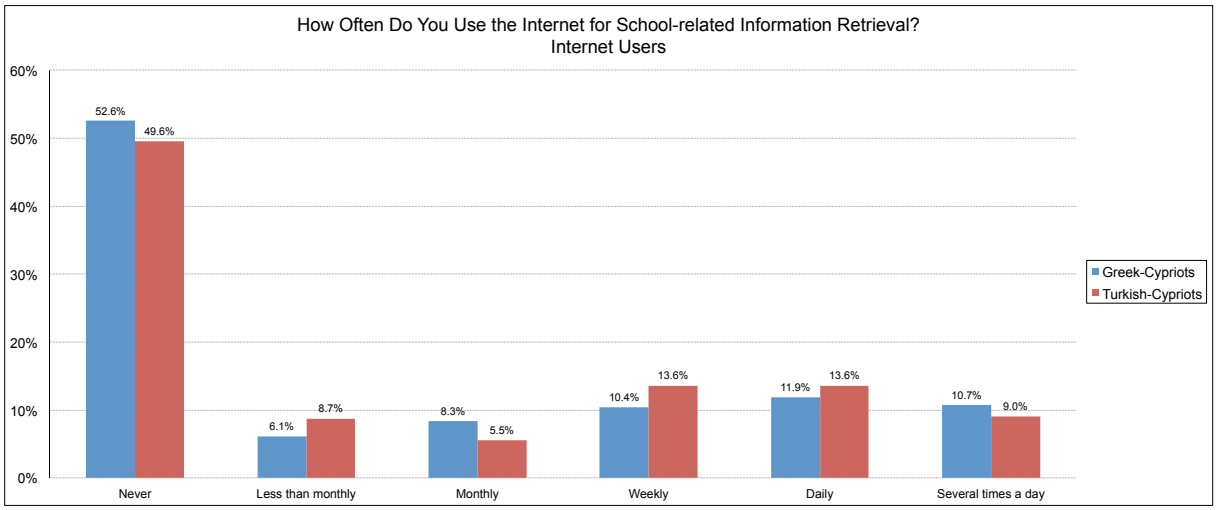

Figure 2.5.5.3. *Online learning - school related information*

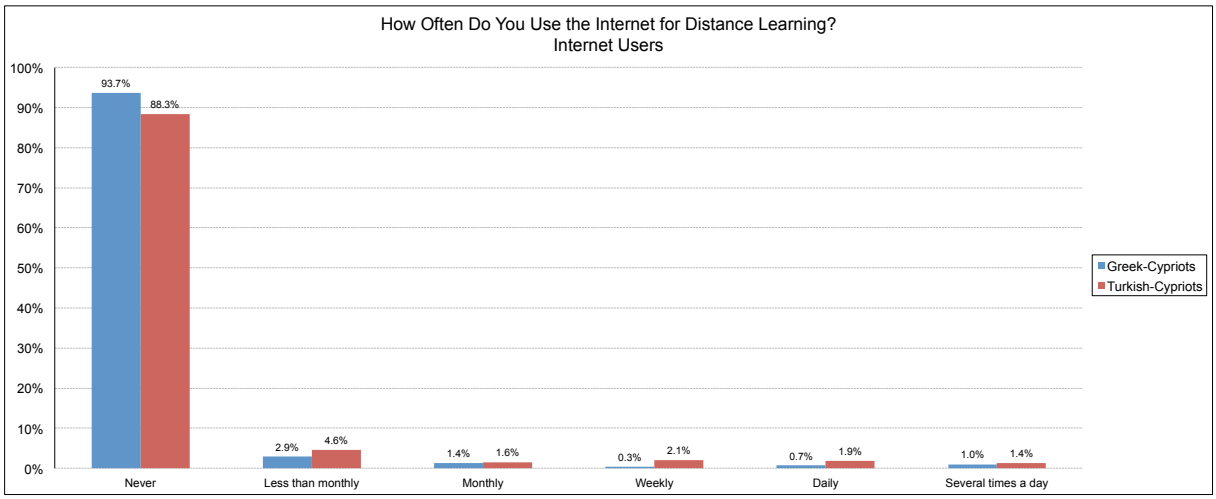

Figure 2.5.5.4. *Online learning - distance learning*

2.6. PERCEPTIONS ABOUT SOCIAL AND POLITICAL LIFE

2.6.1. Political Efficacy

When asked to place themselves on the "Left-Right" degree scale, about one in four Greek-Cypriots and one in five Turkish-Cypriots stated that they do not accept this kind of political distinction (Figure 2.6.1.1). Further, 2.4% of Turkish-Cypriots refused to answer, because they did not want to reveal this kind of personal information. Of those who did place themselves on the scale, an overwhelming majority in both communities chose the middle value. A remarkable difference concerns the percentage that said they did not know (1.8% of Greek-Cypriots vs 8.0% of Turkish-Cypriots). This result could be related to the upcoming presidential election in the Greek-Cypriot community, which could have raised the levels of political awareness among Greek-Cypriot respondents.

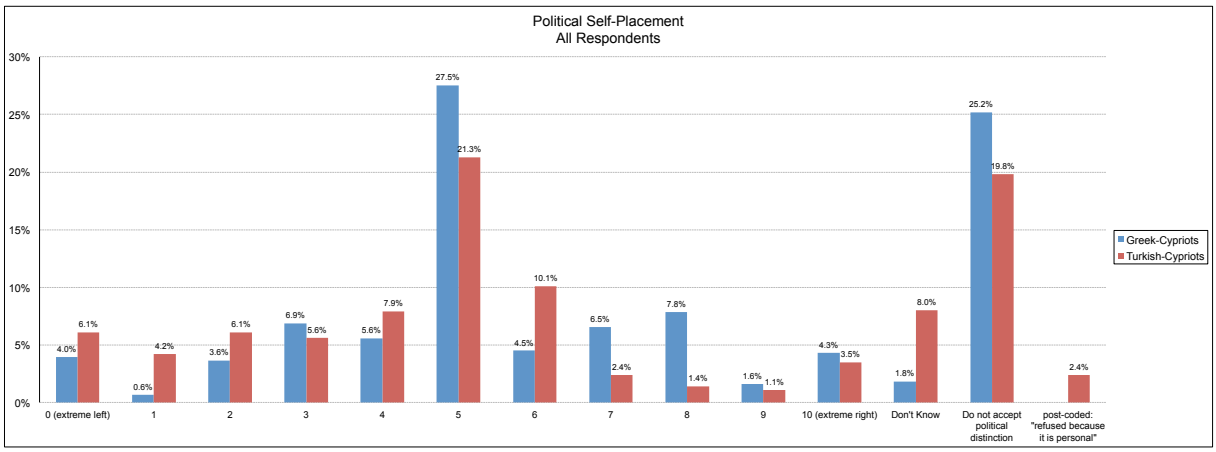

Figure 2.6.1.1. *Political self-placement on the left-right axis*

Distrust toward an increase in political efficacy due to internet use is higher among Turkish-Cypriots as 45.1% of the respondents (vs 35.6% among Greek-Cypriots) do not believe that the internet can increase their influence in politics, while 31.8% (21.8% among Greek-Cypriots) remain uncertain (Figure 2.6.1.2).

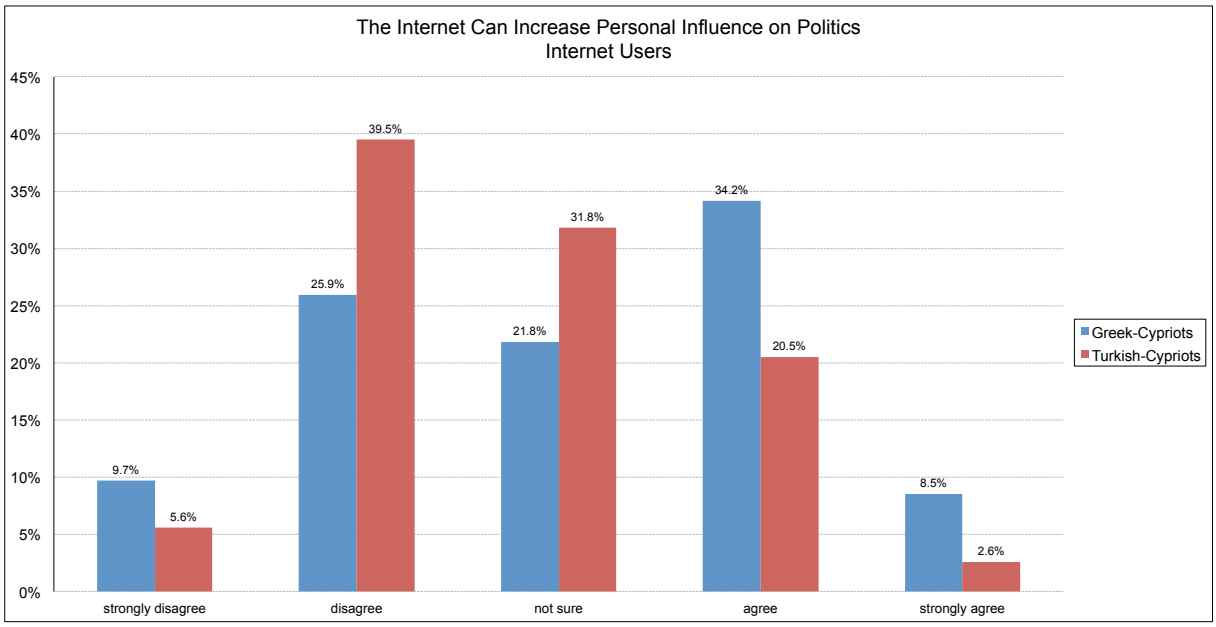

Figure 2.6.1.2. *Increase of personal political power*

Most users in both communities remain skeptical as to whether the use of the internet can increase one's personal impact on governmental decisions and actions (Figure 2.6.1.3).

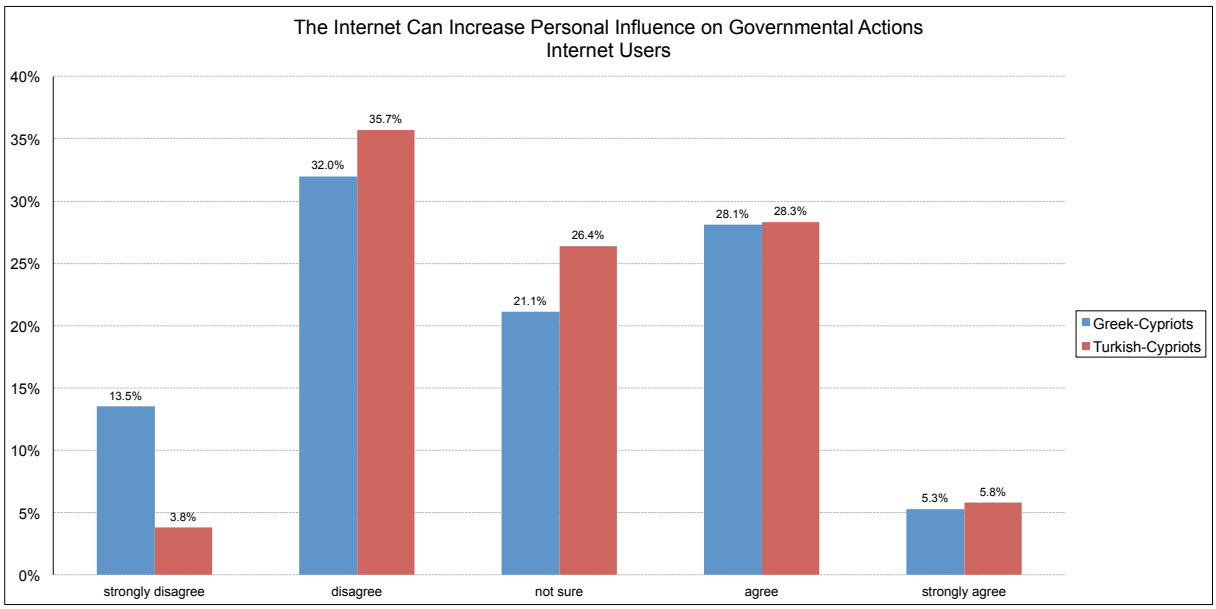

Figure 2.6.1.3. *Increase of personal influence on governmental actions*

Figure 2.6.1.4 shows that the majority in both communities also remains skeptical as to whether the internet can increase public officials' interest in what people think (62.5% of Greek-Cypriot users and 57.3% of Turkish-Cypriot users disagree or strongly disagree with the corresponding statement on the questionnaire).

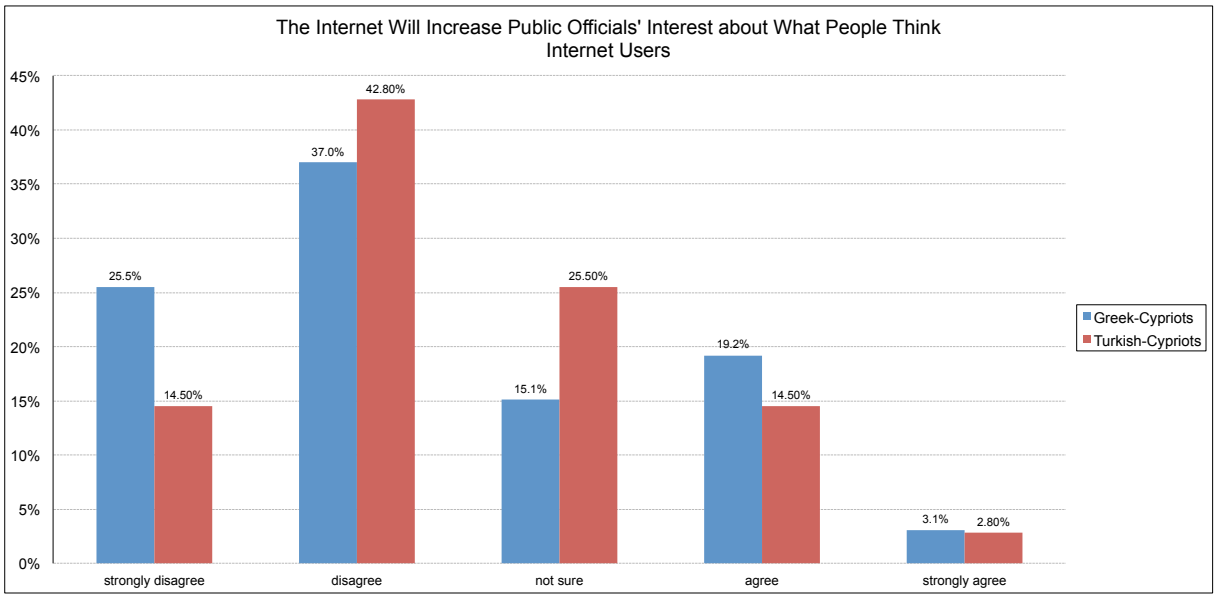

Figure 2.6.1.4. *Increase of officials' interest in what people think*

Yet, Greek-Cypriot respondents evaluate the internet's potential contribution to the understanding of political processes more positively than Turkish-Cypriots (Figure 2.6.1.5).

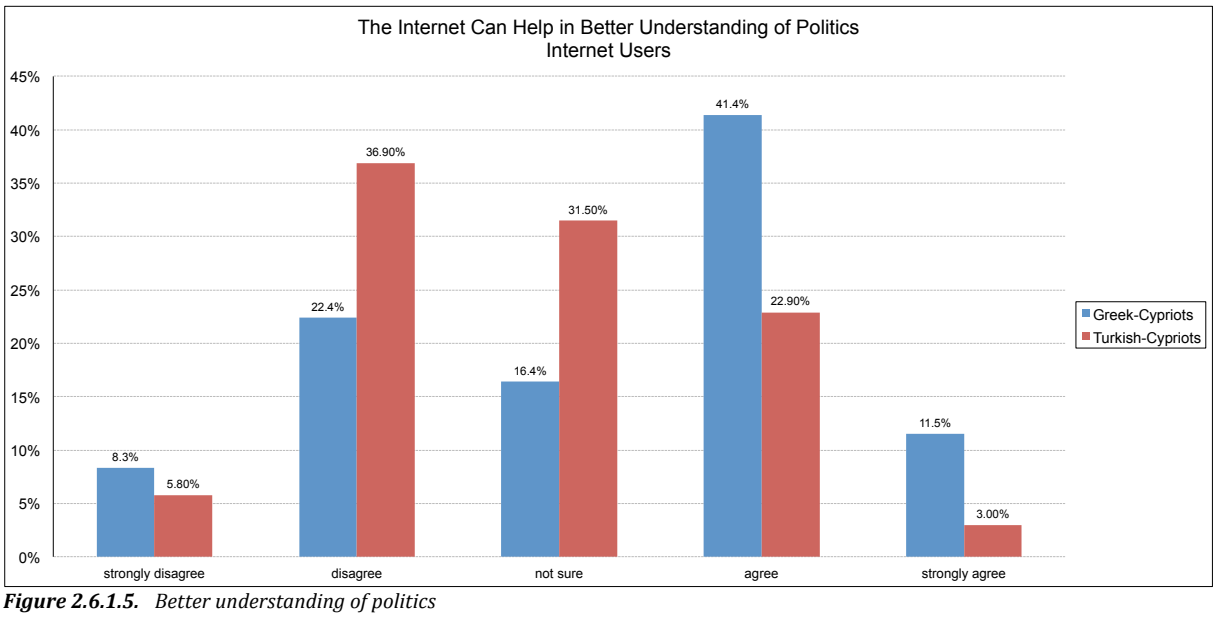

Figure 2.6.1.5. *Better understanding of politics*

Most users perceive an increasing importance of the internet in political campaigning, especially in the Greek-Cypriot community as more than 70% believe that it has acquired importance in political campaigns (Figure 2.6.1.6)

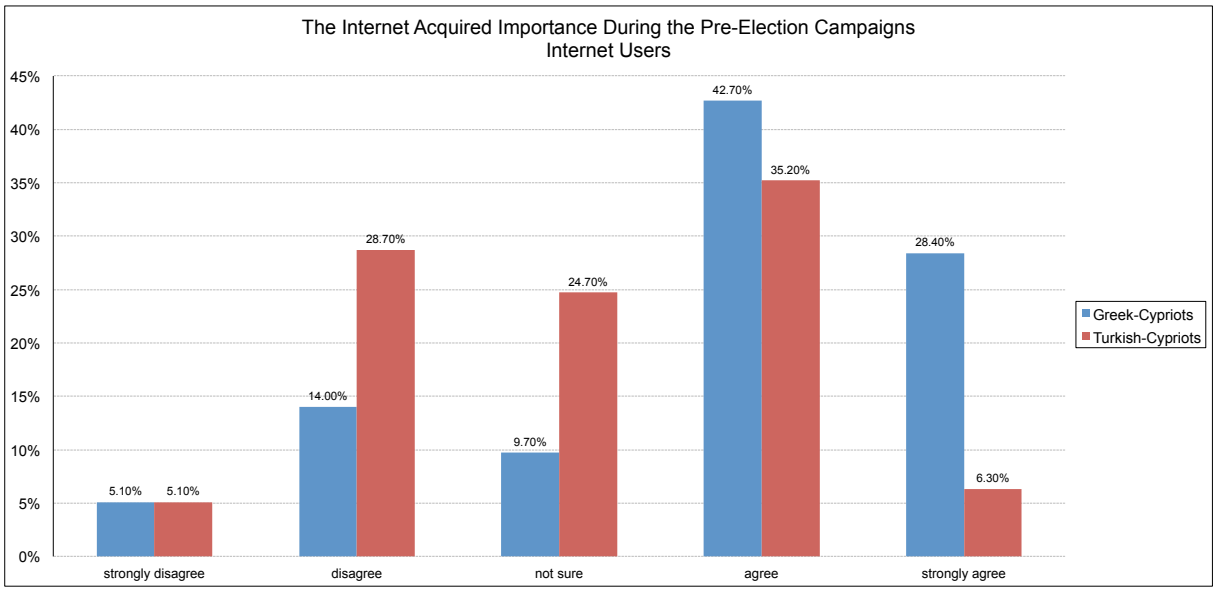

Figure 2.6.1.6. *Importance of internet during the pre-election campaigns.*

2.6.2. Social Trust

In all three questions about social trust, most respondents in both communities placed themselves in the middle of the 10-point scale. Still, Greek-Cypriots' reservations are more pronounced in all three items with 20-25% placing themselves on the extreme "distrust" end of the scale: 22.8% believes that people cannot be trusted at all (Figure 2.6.2.1), 20.3% says that people would try to take advantage of you whenever they have the chance (Figure 2.6.2.2) and 24.9% thinks that people only look out for themselves (Figure 2.6.2.3). The corresponding percentages in the Turkish-Cypriot community are 8.4%, 11.6% and 9.6%.

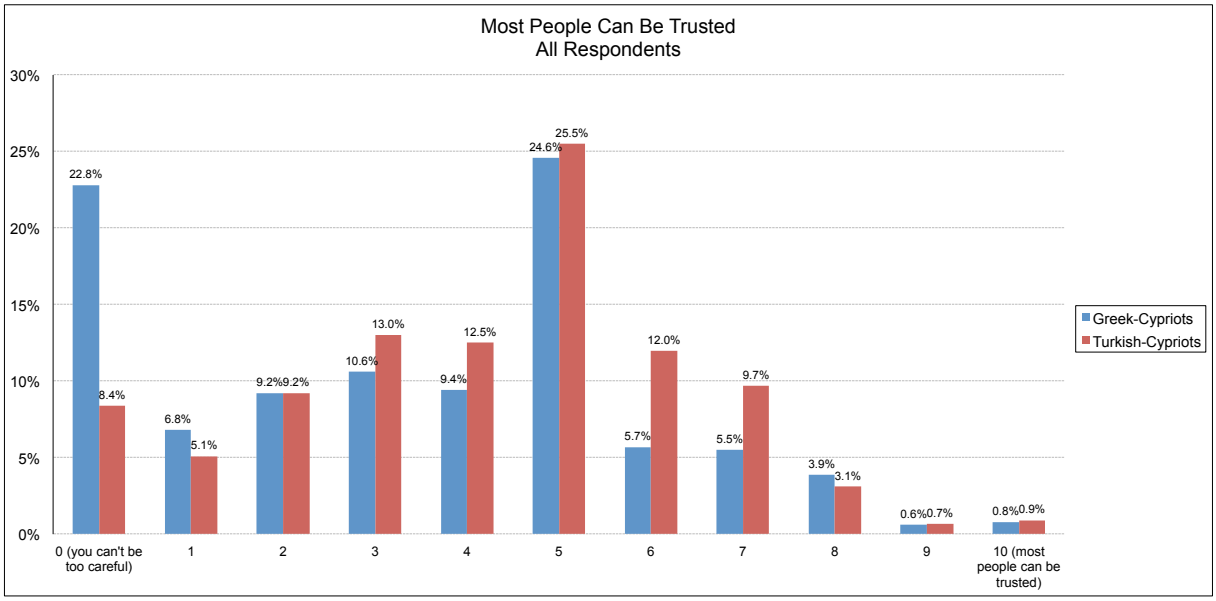

Figure 2.6.2.1. *Most people can be trusted*

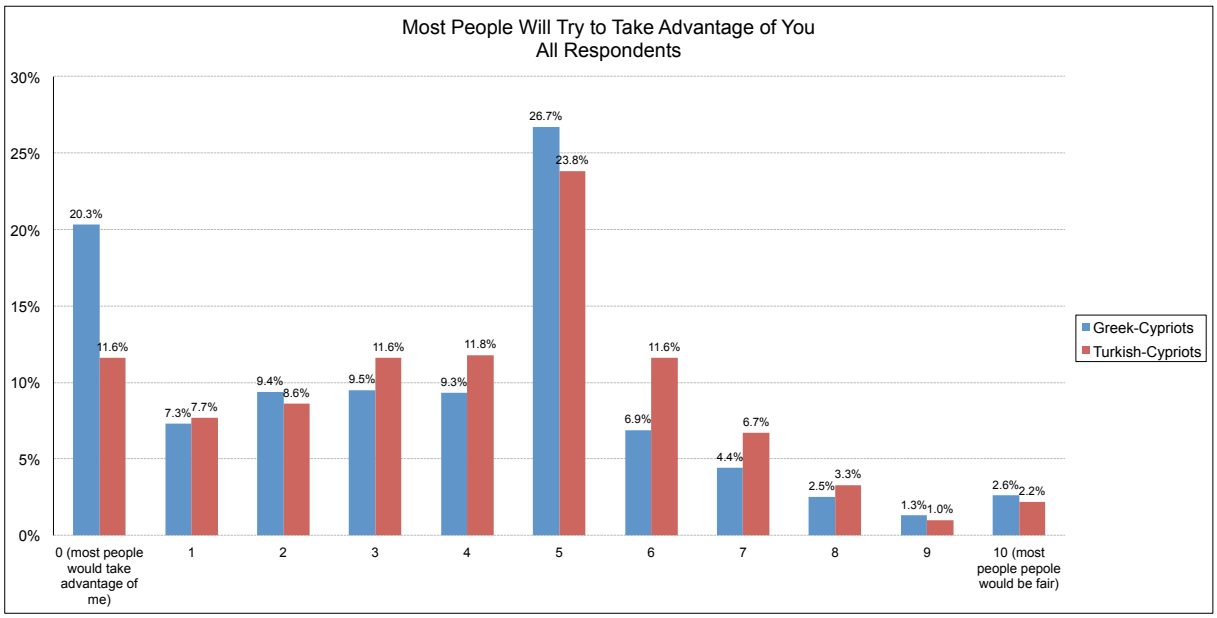

Figure 2.6.2.2. *Most people will try to take advantage of you*

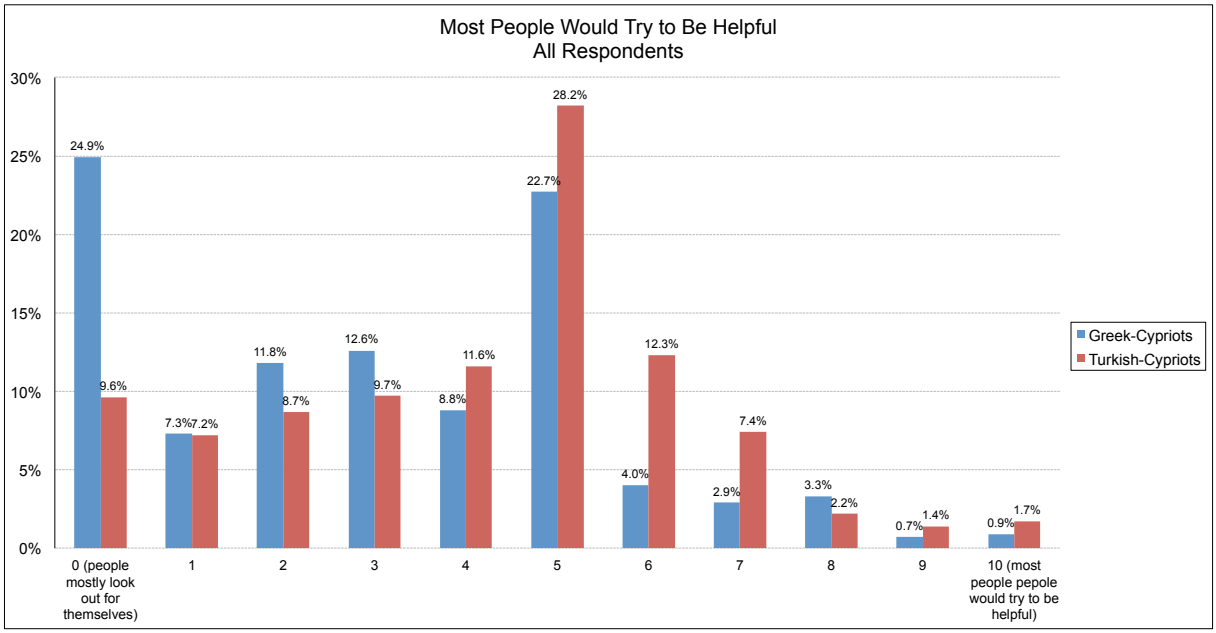

Figure 2.6.2.3. *Most people will try to be helpful*

2.7. FREEDOM OF EXPRESSION AND SURVEILLANCE

2.7.1. Freedom of Expression

Greek-Cypriot respondents declared a higher degree of comfort to express their political opinions on the internet (70% vs 42.9% of Turkish-Cypriots). A large percentage of Turkish-Cypriots (27.3%) feel limited in expressing their opinions on political issues and 29.8% are uncertain (Figure 2.7.1.1).

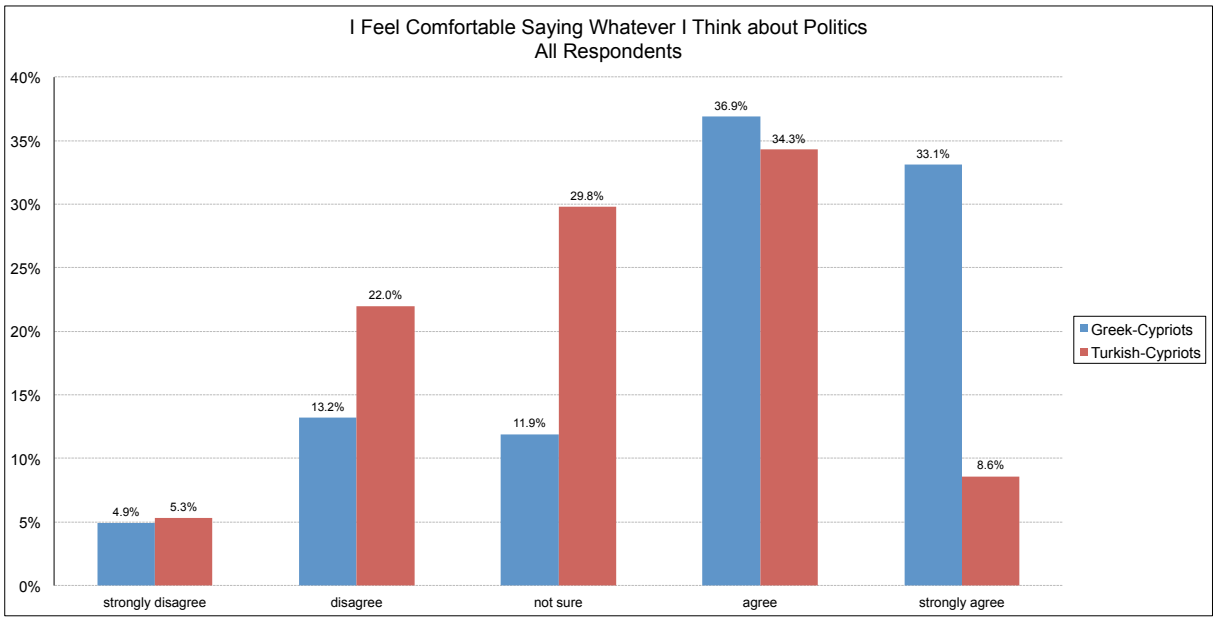

Figure 2.7.1.1. *Freedom of expression on political issues*

A significant proportion of Turkish-Cypriots (34.9%) are also uncertain as to whether it is safe to freely express political views on the internet, while slightly less than half (47.6%) think it is not (compared to 53.5% of Greek-Cypriots). Overall the views of Turkish-Cypriots are more moderate on this issue (Figure 2.7.1.2).

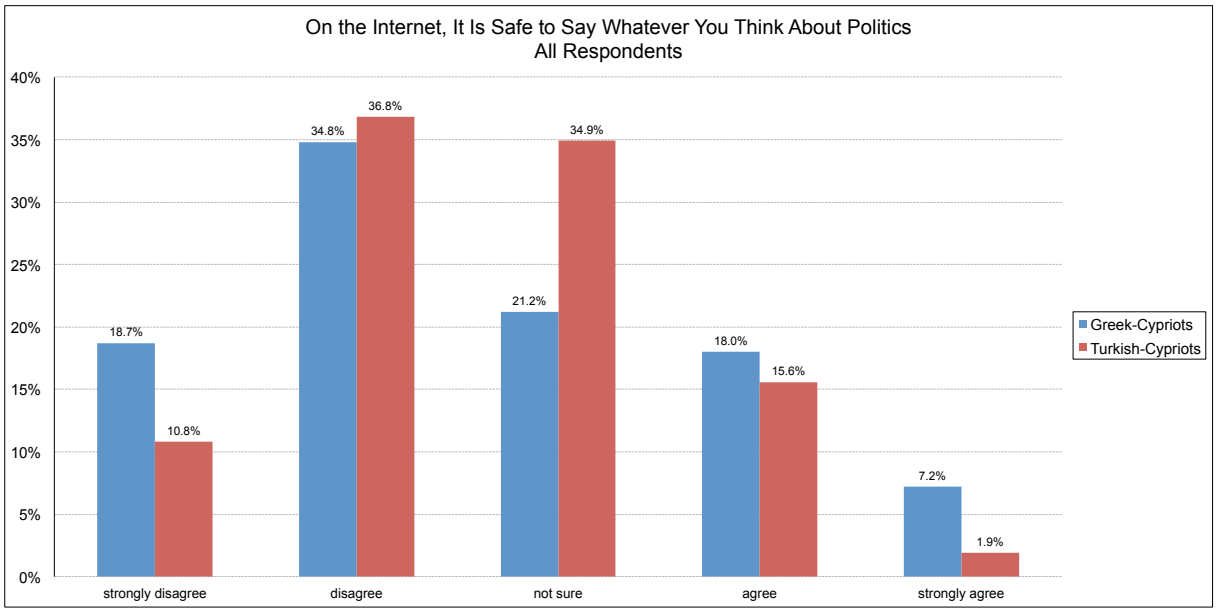

Figure 2.7.1.2. *Political expression online*

The majority of Greek-Cypriots (77.2%) and about half (49.9%) of Turkish-Cypriots are in favor of the freedom to criticize the government online (Figure 2.7.1.3).

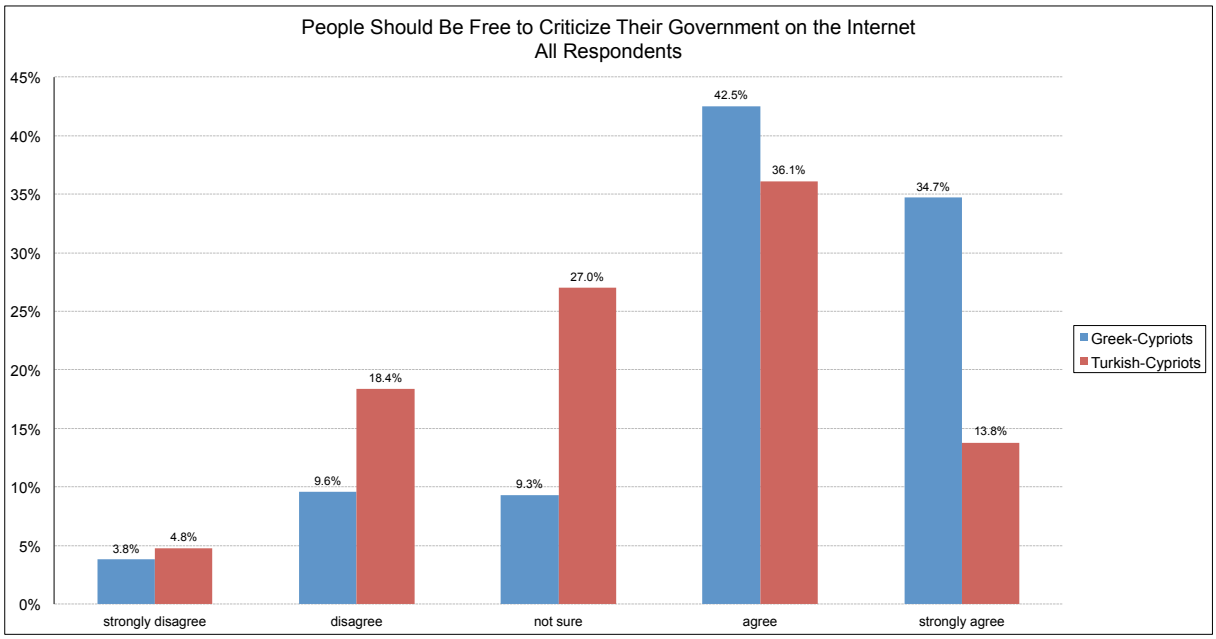

Figure 2.7.1.3. *Criticizing government online*

A higher percentage of Greek-Cypriots (59.4%) than of Turkish-Cypriots (35.4%) is in favor of the freedom to express ideas online, even if they are viewed as extreme (Figure 2.7.1.4).

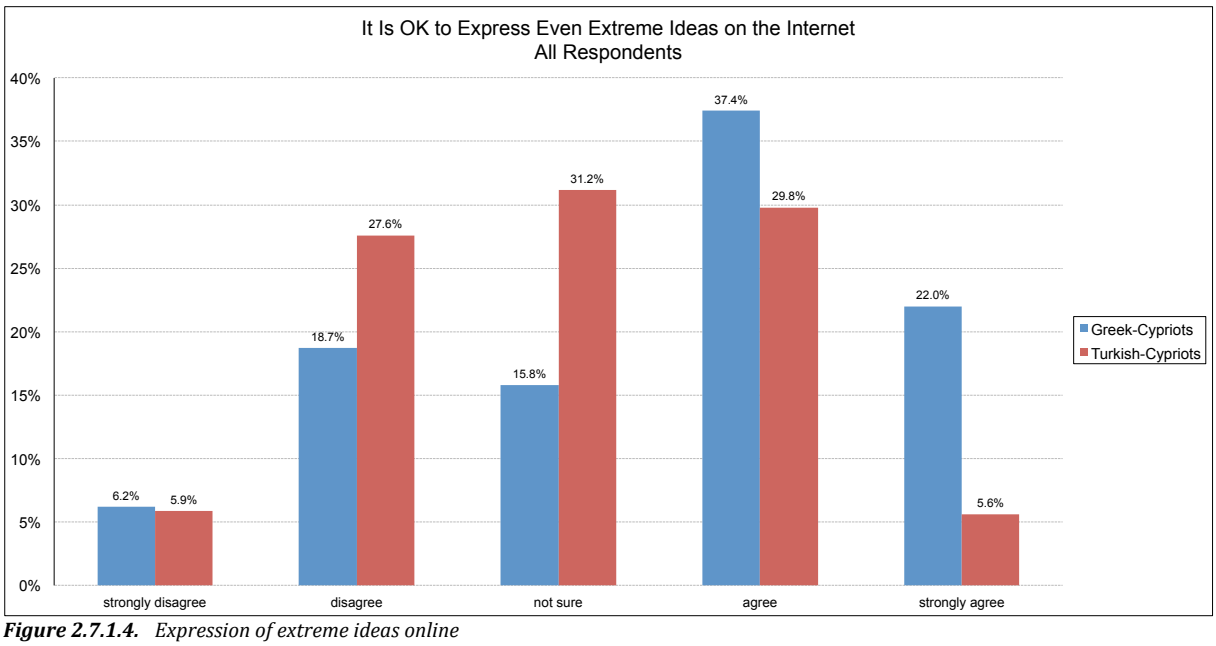

Figure 2.7.1.4. *Expression of extreme ideas online*

Should the government regulate the internet more than it does now? More than four in ten Greek-Cypriot respondents (43.1%) support this view, while only 37.1% of Turkish-Cypriots does so (Figure 2.7.1.5). At the same time, Greek-Cypriots are also more likely to strongly disagree. As it can be seen on the graph Turkish-Cypriots express more moderate views on this issue.

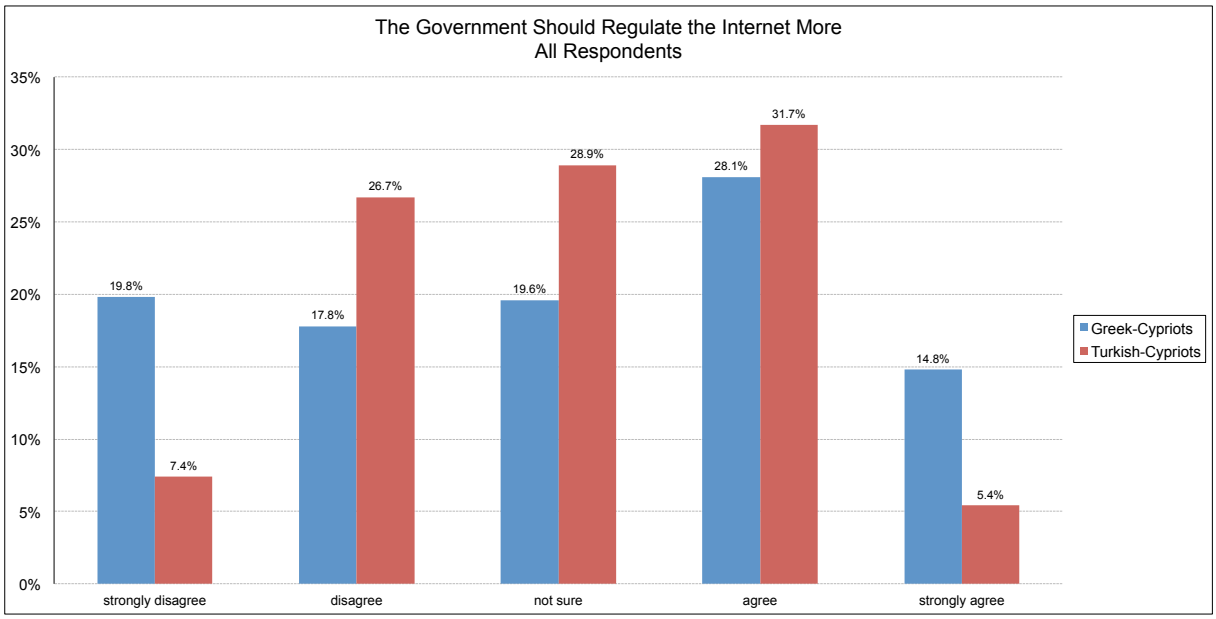

Figure 2.7.1.5. *Government regulation of the internet*

2.7.2. Surveillance

The majority of Greek-Cypriot internet users (62.9%) are not concerned about having their online activity monitored by the state. The corresponding figure for Turkish-Cypriots is much lower at 27.0% (Figure 2.7.2.1). Turkish-Cypriots are more likely to worry about governmental online surveillance, as 45.9% (compared to 21.3% of Greek-Cypriots) agreed or strongly agreed with the corresponding questionnaire item.

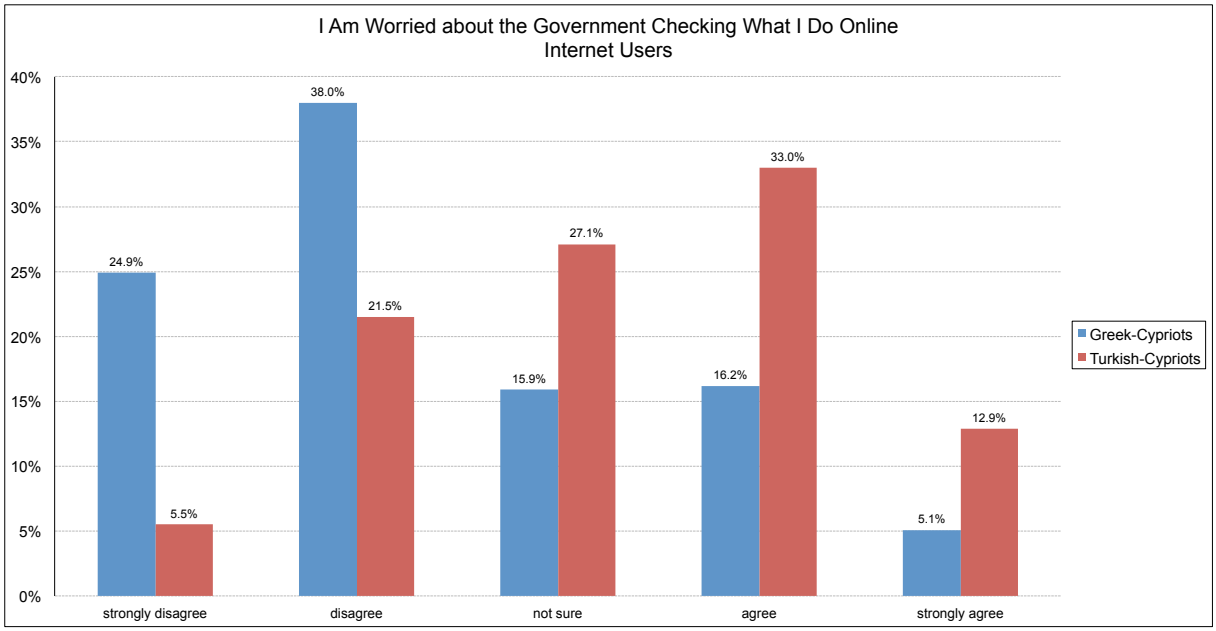

Figure 2.7.2.1. *Concerns about online surveillance by the government*

Similarly, as shown on Figure 2.7.2.2, Turkish-Cypriot internet users (43.5%) are more concerned than Greek-Cypriot users (38.6%) about private sector monitoring of online activity.

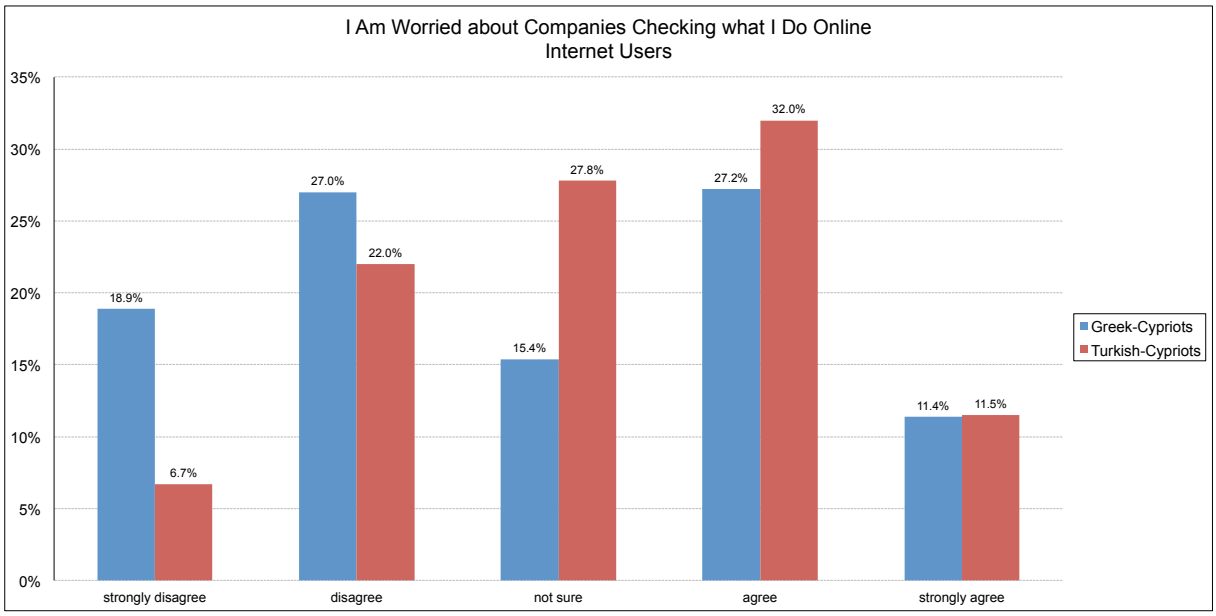

Figure 2.7.2.2. *Concerns about online surveillance by companies*