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Connecting to the internet through a phone line, via a personal computer, has been, until very recently, the only way one could access the internet. In short, if you didn't have either a phone line or a PC, you could not access the internet. Not so today. One of the major trends in 2002 and beyond for the online sector is the growing prevalence of people accessing the internet through devices other than the personal computer – namely, mobile devices.

According to the Department of Commerce, in September 2001, there were 7.6 million households with an internet access device other than a PC. Of those, 5.1 million were internet-enabled mobile phones or pagers, 1.9 million were internet-enabled personal digital assistant (PDAs) or handhelds, and 600,000 households had an internet-enabled television. What the Department of Commerce further added, however, was that nearly all of those with an alternative internet access device to a PC also had an internet enabled PC.

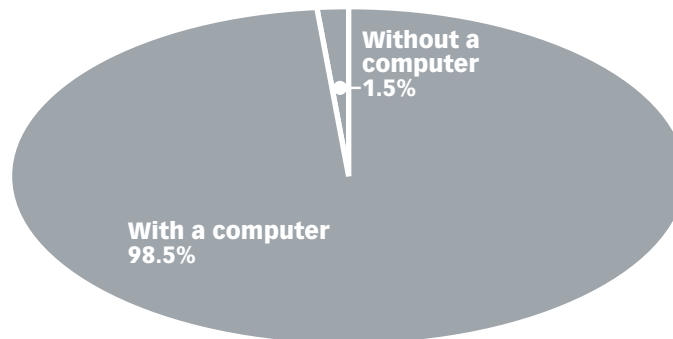
Number of US Households Containing an Internet Access Device Other Than a Computer, September 2001 (in millions and as a % of total households)

Television	0.6 (0.6%)
PDA or other handheld device	1.9 (1.8%)
Cellphones or pagers	5.1 (4.8%)
Total	7.6 (7.2%)

Source: US Department of Commerce, February 2002
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Of all households with internet access in September 2001, only 1.5% did not have a computer according to the Department of Commerce. This would indicate that nearly 1 million people in the US only access the internet through either the TV, mobile phone or PDA.

Percent of US Households with Home Internet Access without a Computer, September 2001



Source: US Department of Commerce, February 2002
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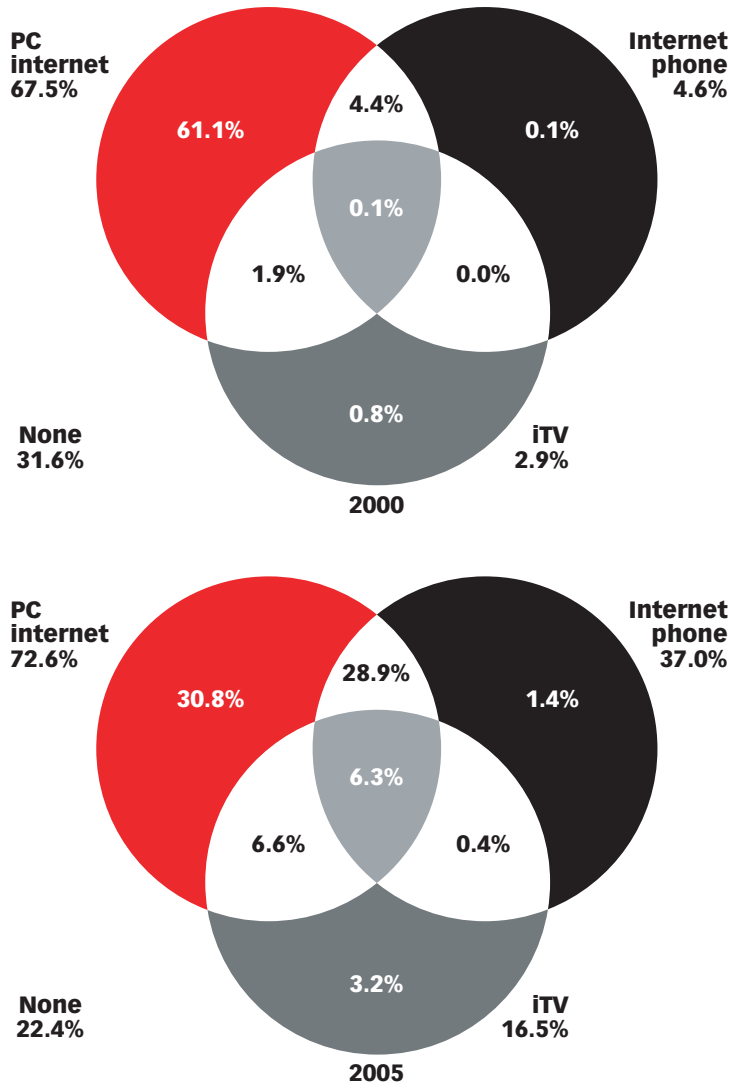
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Gartner projects that by 2005, 37% of the US population will use a phone to access the internet and 16.5% will use the TV. Additionally, 42% of internet users will use more than one device to access the internet. This will be a vast change from 2000, when very few people could access the internet with anything other than a PC.

US Interactive Platform Penetration, 2000 & 2005 (as a % of total population)



Source: GartnerG2, August 2001

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A. PCs

PCs are the primary means for internet users to get online. For those in the US who are not online, a lack of a PC is major reason why. According to the Yankee Group's annual Technologically Advanced Family survey, 93% of households who own a PC also have internet access.

One of the main reasons, perhaps, why internet access devices other than the PC have been slow to become available in the US market is the widespread adoption of PCs. The ITU indicates that at the end of 2001, there were 62.5 PCs per 100 inhabitants in the US. This compares with Canada, which has a similar internet penetration rate to the US, at 40.3 PCs per 100 inhabitants. This indicates that many people possess more than one PC in the US.

PCs per 100 Inhabitants in US and Canada, 2001

United States	62.5
Canada	40.3

Source: International Telecommunication Union (ITU), December 2002

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The Department of Commerce showed in September 2001 that 56.5% of households had a computer compared to 51% in August 2000.

Percent of US Households with a Computer, August 2000 & September 2001 (% of total households)

August 2000	51.0%
September 2001	56.5%

Source: US Department of Commerce, February 2002

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A number of research firms independently conclude that household PC penetration in the US is approximately 62% as of 2001.

Comparative Estimates: Household PC Penetration in the US, 2001

Forrester Research, July 2001	62%
Global Industry Analysts, 2001	62%
Statistical Research, 2001	61%
US Department of Commerce, February 2002	57%

Source: various, as noted, 2001 & 2002

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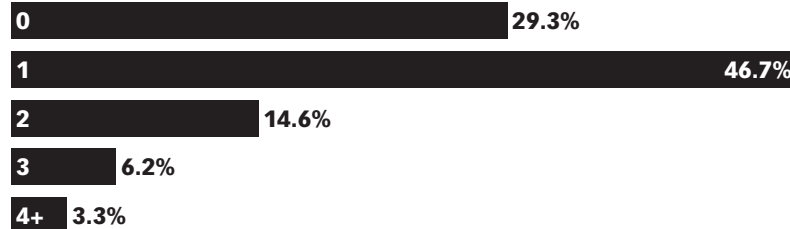
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A recent finding from UCLA Center for Communication Policy shows that over 70% of US households have a computer at the end of 2002, with many having more than one.

**Number of Computers in Households in the US, 2002
(as a % of respondents)**



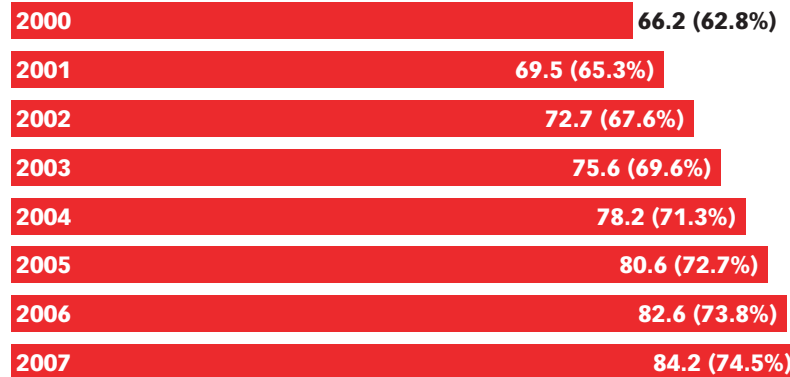
Source: UCLA Center for Communication Policy, February 2003

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The Yankee Group predicts continued PC growth over the next five years so that 84 million, or three-quarters of all households, will have a PC.

US PC Households, 2000-2007 (in millions and as a % of total households)



Source: Yankee Group, November 2002

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