THE INTERNET, MEDIA AND EMERGING TECHNOLOGIES:
Uses, Attitudes, Trends and International Comparisons

CANADA ONLINE!

YEAR TWO REPORT, 2007
An Ongoing Study by the Canadian Internet Project

Charles Zamaria
Fred Fletcher

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Charles Zamaria
Fred Fletcher

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Highlights

The Canadian Internet Project (CIP) provides comprehensive information on how Canadians use the Internet, emerging technologies and traditional media, and how they feel about them. As an ongoing longitudinal study, CIP compares patterns and trends over time. In this instance, we present a comparison of data obtained from our inaugural survey in 2004 with our recent findings from 2007. To place overall patterns of consumption in context, respondents surveyed were also asked about household and personal access to digital devices and their use of and attitudes towards traditional media. Levels of analysis include all Canadians — Internet users and non-users — as well as a number of demographic and behavioural subgroups. In its examination of the relationships between media use and attitudes, the CIP study provides important information about both the expectations Canadians have about Internet use and their reasons for going online. Drawing on the data collected by the World Internet Project (WIP), some key aspects of Internet use in Canada are presented within an international context.

These highlights present an overview of the study's major findings and draw attention to some of the most important implications of the results. In general, our analysis demonstrates the extent to which the Internet, technology and traditional media continue to be extremely important in the everyday lives of a majority of Canadians. Collectively, they are used for staying informed, exploring the world, seeking out entertainment and play, as well as staying connected with others. More and more, the Internet is also being used for both formal and informal research and learning. The dramatic increase since the CIP 2004 study in time spent on entertainment-related activities and social engagement, especially among youth, has important implications for both online and offline culture, as does the increase in the use of novel and interactive applications online. The inter-relationship between the use of both older and newer media and technologies as demonstrated by usage patterns indicates that simple explanations of adoption and displacement are invalid.

Internet Penetration

Canadians continue to be among the world's most frequent and heaviest Internet users. Nearly nine in ten Canadians 12 years and older (88%) have been online at some time in their lives, and close to four in five are current users (78%), having used the Internet within the three months previous to the survey. Penetration levels are high and increasing, particularly among traditionally marginalized social groups.

- Internet penetration levels in Canada increased from 72% to 78% from 2004 to 2007
- Across life stage categories in Canada, 95% of students, 87% of employed citizens and 47% of retired individuals use the Internet
- Age is strongly related to Internet adoption — the younger the individual, the more likely she/he is to be online
- Internet use is almost universal among those 12–17 years of age (96%)
- While 22% of adult parents (18+) do not use the Internet, many of them report having youth aged 12–17 in their households who use the Internet (87%), as well as children aged 11 or younger who use it (21%)
- Half of Canada's most elderly population — 60 years and older — are online (51%), which exceeds national adoption levels for all ages in many other countries around the world
- Canadian Internet users are very experienced, having been online for an average of approximately nine years
- Most Canadians online are heavy Internet users — 40% use the Internet 15 hours or more each week

- Youth and younger individuals (aged 12–29) are the heaviest Internet users among all Canadians
- In 2007, Canadian Internet users spent an average of 17 hours per week online, a substantial increase from 2004 (13 hours per week)

Digital Divides

Inequalities in access to and use of the Internet remain in specific demographic sectors, most notably, a 15% gap in adoption levels between English-speaking and French-speaking Canadians (82% versus 67%). However, across most other subgroups and categories studied, these divides are diminishing in Canada.

- Canadians with higher income, education and professional status are more likely to be online than are more marginalized groups, though gaps have decreased from 2004 to 2007
- Internet use among the lowest education demographic has increased from 48% in 2004 to 56% in 2007
- In terms of access, the gender gap has almost disappeared (80% of males are online compared to 77% of females) but, in general, males more actively engage in a greater diversity of activities and applications while online than do females
- Within Canada, gaps in Internet use across income levels have diminished greatly; lower income households have shown the largest increase in home Internet use compared to all other income categories (59% of individuals with household incomes less than $40k use the Internet)
- While the language and regional divide for current French-speaking Internet users in Quebec compared to English-speaking Internet users in the rest of Canada has increased from 8% in 2004 to 15% in 2007, the gap is much smaller for those who have been online in the past year (Anglophones: 85% versus Francophones: 77%); this suggests there are more intermittent or occasional users in Quebec than in other provinces or regions
- Regionally, the Prairie provinces have experienced the most dramatic growth in Internet penetration, increasing from 69% in 2004 to 81% in 2007
- Growth and proliferation of Internet adoption in smaller towns and villages is much stronger than in larger cities, reflecting improvements in access

Locations and Devices Used for Internet Access

Canadians online predominantly use the Internet from home (94% of all Internet users) and mostly from a wired PC (90%).The high and growing level of home use, compared to work (43%), school (20%), public places (16%) and other locations (home of friend or relative: 26%, other: 2%) demonstrates an important shift in Internet consumption patterns, from instrumental to social, from information oriented to entertainment oriented.

- The greatest increase in time spent online occurred in the home environment, representing 60% of the total time spent online by Canadians (an increase of three hours per week from 2004, for a total amount of time online from home of just under 11 hours per week in 2007)
- Only one-third of Canadians use wireless devices, such as a wireless PC or mobile device, to go online (32%) and just over one in ten access the Internet through cell phones (13%)

- While Internet access from wireless devices and in public locations is relatively low, youth and young Canadians (aged 12–29) are increasingly making use of wireless and mobile technology to access the Internet from locations outside their homes
- Overall, time spent online using mobile and wireless technology has increased, from 1.6 hours per week in 2004 to 2.6 hours per week in 2007

Canadians Not Online

Even though most Canadians identify themselves as current Internet users, it is noteworthy that more than one in five remain offline. Internet non-users have decreased from 28% of Canadians in 2004 to 22% in 2007. The CIP data indicate that most non-users are offline by choice, rather than because they can't afford it or lack access.

- Of all Canadians, 12% have never used the Internet
- One in ten Canadians (10%), representing nearly half of all Internet non-users, have previously used the Internet but currently do not[1]
- Almost one-half of those not online (41%) plan to use the Internet in the future; most of these current non-users intend to be online within six months
- The most common reasons given for not using the Internet are a lack of interest, a sense that the Internet is not useful, confusion about technology, and a lack of understanding about how to operate technology required to access the Internet
- Affordability was not a frequently cited reason for not using the Internet — only 9% of all non-users claimed cost was why they were not connected
- Demographically, non-users are more frequent among Anglophones than among Francophones, more numerous in Quebec and Ontario than in other provinces, more likely to be female than male, more often residents of smaller than larger communities, and more likely to be older and retired citizens than younger Canadians, students or employed
- Four distinct subgroups of Internet non-users were identified, each with distinct demographic attributes, behaviours and attitudes:
    - Casual engagers (30% of all non-users): current non-users who used the Internet in the past and plan to be online again in the future
    - Departed users (16% of all non-users): those who used the Internet in the past but do not plan to do so in the future
    - Expected converts (11% of all non-users): those who have never used the Internet but likely will in the future
    - Hard core non-users (43% of all non-users): those who have never used the Internet and have declared they will not in the future
- Casual engagers (6% of all Canadians) are current non-users who continue to use the Internet intermittently
- Departed users and hard core non-users exhibit the least comfort with technology compared to all Canadians; this is a principal reason for their non-engagement online
- Hard core non-users display the highest level of engagement with and reliance on conventional media, such as television, radio, newspapers and books
- Casual engagers form a larger proportion of the non-user group in 2007 than they did in 2004
- The number of non-users who have never used the Internet and do not intend to in the future decreased from 18% of the entire population in 2004 to 12% in 2007
- Hard core non-users tend to be considerably older than the general population and it is likely that this category will diminish in size over time

[1] CIP defines a current Internet user as a respondent who had used the Internet in the three months previous to when the survey was conducted.

Access to Broadband and Mobile Connectivity

The diffusion of high-speed broadband connections is important because broadband access greatly alters patterns of Internet use and the diversity of activities and applications users engage in while online. The fact that a majority of Internet users now use a broadband gateway to go online indicates that Canada has reached a "tipping point" beyond which high-speed and ubiquitous access will become the norm.

- Broadband access is found in 80% of Internet user households or 54% of all Canadian homes, which represents an increase of 13 percentage points since 2004
- High-speed connectivity to the Internet is evenly divided between cable (37%) and high-speed ADSL telephone services (36%)
- Slightly more than 15% of Internet users maintain a low-speed telephone connection at home
- The heaviest and the most experienced Internet users are more likely than the average user to have a high-speed connection
- Those who use broadband spend twice as much time online (20.5 hours per week) as do those without broadband (10.7 hours per week)
- Online activities that are made easier to access using broadband have shown dramatic growth since 2004, including downloading or listening to music, watching television, videos or movies, and playing games
- Internet access via mobile devices and satellite transmission is growing steadily in popularity, but the wired computer via either a cable or telephone hookup continues to be the main conduit for Internet connectivity
- Nearly half of heavy Internet users make use of wireless connections, mostly as a supplement to wired access
- As mobile devices become more common, a proliferation of content and services designed specifically for small screens, shaping the nature of both text and image, can be expected

Household Technology and Devices

Canadians are early adopters and heavy users of many household devices — both established and emerging technologies. However, mobile use of the Internet has been somewhat slow to develop.

- One in three Internet users (32%) makes use of some type of wireless device
- Heavy and more experienced Internet users, as well as wealthier and younger users, are more likely to use wireless devices than are any other group
- More than eight in ten Canadian households have at least one computer (83%); almost all Internet users have access to a computer at home (97%)
- Multiple computer (two or more) households have increased significantly between 2004 (25%) and 2007 (40%)
- While 96% of Canadians use a traditional wired telephone for an average of 3.5 hours per week, nearly one in five (18%) report that the Internet has largely or completely replaced its use for communication
- Canadians own a wide range of information and communication technologies (ICTs); the more popular devices include VCR/DVD players (94%), MP3 players (46%) and video game consoles (41%)
- Less common ICT appliances owned by Canadians are PVRs (29%) and PDAs (13%)
- Nearly one-quarter of Canadian households have an HDTV receiver (24%), while just 18% possess a set-top box capable of receiving an HD signal

- Compared to non-users, Internet users are more frequent and heavier users of virtually all communication devices
- Media use begets more media use; those who spend more time online use all other media and technologies more than do those who spend less time online
- New devices, like Slingboxes and Apple TV (3% penetration rate in Canada), are at the beginning of the adoption cycle and are more likely to be present in households with youth or younger adults
- From 2004 to 2007, there was modest but steady growth in the adoption of most ICTs; ownership of MP3 players grew most dramatically (from 18% to 45% of households)

Cell Phone Use

While penetration levels of cell phones are substantial, with seven in ten Canadian households possessing at least one, adoption rates for multi-function applications provided by cell phones and mobile devices have not increased as greatly. Except among youth (12–17), for the Canadian population Internet and other cell phone applications remain at comparatively lower levels than in many other countries.

- Cell phones are used in 71% of Canadian households
- Voice communication is the most commonly used cell phone application (2.5 hours per week)
- Other popular applications for cell phone users include text messaging (44%) and taking photographs (36%) while less common applications include downloading music (10%) and watching videos or television (3%)
- While overall only 13% of those with cell phones use Internet applications, twice as many youth (27%) engage in online activities from mobile devices
- Youth (12–17) use numerous cell phone applications, including text messaging, taking pictures, downloading ringtones or music, playing games, and watching videos or television, twice as often as do adult cell phone users

Traditional Media Use

As time spent online has increased, use of traditional media has declined slightly. In particular, television viewing has declined since 2004, though the decline has been the same for Internet users and non-users. For the most part, online activities appear to supplement rather than displace traditional media use. In general, new media applications and activities are being added to an existing media diet that includes substantial time spent with conventional media, even for youth and younger Internet users.

- Overall, Canadians spend just over 45 hours per week consuming traditional media and engaging in live entertainment activities, as defined across a constructed index of selected media created by CIP
- There is no difference between Internet users and non-users in total time spent using traditional media
- Internet users spend on average 17 hours per week online, representing 28% of the Internet user's media diet — an increase of seven percentage points from 2004
- Heavy Internet users also tend to consume traditional media to a large degree
- Youth (12–17) use traditional media 40 hours a week, 15% less than do adults (18 years or older) at 46 hours per week; much of this time is made up by greater use of the Internet

- Youth and younger Canadians (12–29) use the Internet more and older Canadians use traditional media more; however, youth and younger Canadians still consume high levels of all media including traditional media
- From 2004 to 2007, traditional media use for adults declined by 13%, or five hours per week (50 hours to 45 hours)
- Overall traditional media use declined in similar proportion for Internet users and non-users between 2004 and 2007
- Television continues to be the predominant traditional medium; Internet users spend 21% of their traditional media diet watching television while non-users spend 29% of their media diet watching television
- Television viewing by Internet users (9.7 hours per week) compared to non-users (13.2 hours per week) shows the largest difference in time spent for any traditional medium between these two subgroups (3.5 hour gap)
- In an average week, youth spend much more time listening to music than do adults (9.9 hours compared to 6.6 hours per week), while adults spend more time watching television than do youth (11.3 hours compared to 7.6 hours per week)
- The media use behaviour of Canadians is evolving towards increased concurrent activities and multi-tasking across several platforms and media; it is therefore becoming more difficult to isolate and measure specific media use as Canadians, more and more, attend to many media simultaneously
- Penetration levels and time spent remain high for the most common mass media, such as television, radio, newspapers and books, across all demographic categories and for both Internet users and non-users
- While most Internet users do not feel being online has reduced their consumption of the most common traditional media, between 18% and 25% perceive that it has
- The overall pattern of media use by Canadians supports the notion that Internet activity augments traditional media, as opposed to displaces it

Multi-tasking and Screen Sharing

Media use behaviour of Canadians is evolving towards increased concurrent activities and multi-tasking across several platforms and media. Even more than other media, the Internet appears to be used both casually and experientially, not demanding the focused attention that some other media do. As well, Internet users often share time online with someone physically beside them. It is becoming more difficult to isolate and measure specific media use for individuals as Canadians, more and more, attend to many media simultaneously, often in the company of others.

- Three in four Canadian Internet users (76%) simultaneously engage in another activity while online; one-third, or 36%, report doing so most of the time
- Multi-tasking is most common among youth (89%) and those aged 18–29 (91%); more than half of Internet users from both these age segments report doing so often
- The most popular activities undertaken by Internet users while online are talking on the telephone or cell phone (44%), listening to music or the radio (36%) and watching television (32%)
- Using the Internet has become both a virtually social phenomena (demonstrated by the proliferation of engagement through online social networking) and a physically social activity (73% of those who use the Internet “screen share” or engage online with someone sitting beside them; one in ten users do so often)

Attitudes Towards Technology and the Media

Canadians demonstrate general comfort with technology, which is reflected in their swift adoption of new applications, devices and new media. However, Canadian Internet users are quite sceptical about the security of financial information online and about the reliability of the information they find there.

- Most Canadians are comfortable with new technologies, especially youth and younger, more experienced and frequent Internet users
- Early adopters of new devices and those most engaged with the Internet report higher levels of comfort with technology than do others
- All Canadians, including Internet users, are concerned about the security of financial information online and express an ongoing scepticism about the reliability of information on the Internet
- Heavier and more experienced Internet users are more confident than are other Canadians about online security and the reliability of online information
- Newspapers are considered the most reliable source of information of all media, even by those who are comfortable online
- Canadians regard television as the best source of entertainment compared to other media
- Canadians in general rely more heavily on interpersonal sources for their information and entertainment than on any media source (66% regard interpersonal sources as important for information while 76% regard them as important for entertainment)
- From 2004 to 2007, the number of Canadians who regard the Internet as important for entertainment increased substantially
- The Internet has become a dominant place for social interaction and creative expression, particularly for youth and youth adults (12–29)

Internet Activities — Information, Entertainment and Learning

Internet users continue to undertake a diverse array of utilitarian and search functions while online. Seeking information — whether for facts, learning or entertainment — continues to be a predominant reason for going online. However, going online for fun and leisure also grew considerably from 2004 to 2007.

- Downloading and listening to music online is the most popular entertainment-related activity, undertaken by more than half of all Internet users (56%); this activity is more prominent among youth (86%) than among adults (52%)
- Other popular online entertainment activities include visiting television program websites (46%), playing games (43%), downloading or watching videos (40%), and listening to the radio (39%)
- Youth are twice as likely as adults to use the Internet for many entertainment activities such as playing games (85% versus 37%), downloading or watching videos (79% versus 35%) and downloading or watching movies (39% versus 18%)
- The most popular information-related activities include checking maps or addresses (82%), looking for news (79%), and checking weather or traffic conditions (71%); one-third of those online attend to these activities on a daily basis
- Other prominent information-seeking activities undertaken at least occasionally by two in three Internet users include looking for medical, health or travel information, and various entertainment-related searching (for movies, concert and performing arts schedules, books, information on authors and cultural events, and so on)
- Experienced, heavy Internet users with higher levels of education are the most likely among all Canadians to visit information-related sites

- Access to broadband and being of a young age are two important predictors for increased entertainment-related engagement online
- Almost one in five Internet users (18%) engage in formal distance online learning
- Most Canadians online (77%) browse the Internet at times without a specific purpose or destination in mind; almost half do so regularly, indicating that non-specific Internet use and the experience of just being online and connected is also very important to Canadians (especially younger and heavier users)

News and News-related Information Online

News and news-related information seeking continues, along with communication, to be among the most predominant uses of the Internet.

- Canadian Internet users make frequent use of search engines and many use them as home pages (first page viewed when online) on their personal computers (57% use a search engine daily or several times a day)
- The three most popular home pages for personal computers are Google, MSN and Yahoo; together, they comprise 61% of the home pages accessed by Canadian Internet users
- Most Canadian Internet users (79%) regularly go online to look for local, national or international news
- A majority of Internet users (78%) feel offline printed newspapers are still a trusted source of news
- Almost half of all Internet users have downloaded or read a newspaper online; 24% do so on a weekly or more frequent basis
- Younger Internet users (18–29) spend less time than do older users reading traditional printed newspapers, but more frequently visit news sites online
- The most popular Canadian news sites visited by Internet users are cbc.ca (19%), ctv.ca (7%) and globeandmail.com (7%)
- The most popular news websites for English-speaking Internet users are cbc.ca (23% of Anglophone news users), MSN (14%) and CNN (12%)
- The most popular news websites among Francophone Internet users are Radio-Canada (25%), Canoe (25%) and Cyberpresse (13%) — all Quebec-based websites
- The news websites favoured by youth (aged 12–17) are not significantly different from those preferred by adults
- Online newspapers have appeal for all age groups, especially younger users, but do not seem to be replacing printed versions

Information Versus Entertainment Online

While the Internet has long been established as a conduit for information, overall, entertainment-related activities and engagement has increased dramatically since 2004.

- On average, Canadian Internet users spend 60% of their time online for information purposes and 40% of their time engaged in entertainment-related activities
- Age is closely related with the types of activities undertaken online: the information-to-entertainment ratio for youth Internet users (12–17) is 40:60, while for elderly Canadians (60+) the ratio is 68:32
- Overall, 53% of Internet users spend the majority of their time online for information purposes, 28% spend the majority of their time predominantly for entertainment, and 19% spend equal time online for information and entertainment reasons

- The perception that the Internet is not important for entertainment has declined substantially, from 55% in 2004 to 39% in 2007

Internet Applications

While established communication and information-oriented activities continue to be popular, the range of applications and activities engaged in online continues to grow. Canadian Internet users, especially younger users and those who spend more time online, participate in a wide variety of activities.

- E-mail remains the most frequently used online communication application for all Internet users (95%), and is used daily or more frequently by 79% of those online
- Internet users spend an average of 4.4 hours per week reading and writing e-mail
- Text messaging via mobile phones is an important emerging communication application for youth (77%) and those aged 18–24 (89%)
- Instant messaging (57%) and participation in chat rooms online (17%) continue to proliferate, and are nearly as popular as e-mail for youth (85% and 35% respectively) and for young adults (aged 18–29) (84% and 21% respectively)
- Youth online use blogs (48%) and wikis (30%) at more than twice the average rate of adult Internet users, 18 years and older (24% and 14% respectively)
- Telephony on the Internet has remained stable among adult Internet users since 2004 (13%); however, substantially more youth (24%) and young adults (17%) now use telephone-related technology online
- iTunes is one of the most popular e-commerce music sites; it is used by one in five of all Internet users (22%), most of whom are youth (35%) and young adults (31%)
- One in four adults visits music downloading sites other than iTunes (25%), whereas 55% of youth and 47% of young adult Internet users do so
- Canadian Internet users were adopting newly introduced applications at the time of the survey, including Skype (8%), virtual world sites (5%) and Joost (1%); penetration levels for these new applications were much higher for youth and younger adults (12–29) than for the rest of the population
- Various simple forms of online creative expression, such as posting photographs and videos, creating websites and sending original creations, are increasingly popular activities, especially among Internet users under 30 years of age
- Posting photos is the most common form of shared creative expression by those online (33%)
- In 2007, 20% of all Internet users reported having a personal website compared to only 1% in 2004
- The heaviest users of most Internet applications — new and old— are in the 18–29 age group
- Most applications, aside from e-mail, chat rooms and virtual world sites, are more popular with males than with females
- Almost all of the online activities examined — both information and entertainment related — showed significant increases in participation rates over the past few years; some, like accessing news online, increased only marginally, while others, such as attending online auctions or downloading movies, increased dramatically

Community and Social Engagement

The Internet provides countless opportunities to interact with others. For many younger Internet users, going online is as much about exploring, socializing and experiencing new forms of interaction as it is about sending targeted communications, seeking information or working. New

and innovative forms of Internet engagement are increasingly being added to the existing foundation of instrumental uses.

- Many Canadian Internet users (40%) have visited a community or social networking site, and almost one in four do so at least weekly
- While more than half of Internet users under 30 have visited a community or social networking site, as many as one in five elder Canadians (60 years and older) has also done so
- One in four young adults (18–29) visit social networking sites daily
- Young adults are also the most active contributors to these sites (as opposed to just visitors); 29% upload material on a weekly basis
- Social networking sites have greater appeal for English-speaking Canadians (43%) than for French-speaking Canadians (24%)
- The most prevalent reasons for visiting community and social networking sites are to interact or socialize with family and friends (38%), to share and obtain information (24%), and for general entertainment and fun (15%)
- Internet users under 45 and females visit social networking sites primarily to socialize; older users and males do so predominantly to obtain and share information
- Youth (12–17) visit community and social networking sites mostly to socialize and for fun

Downloading and Streaming Content Online

Downloading and live streaming of various media have increased dramatically. As adoption of broadband increases, so too do the diversity of sources and forms of content accessed, most notably among young Internet users.

- Downloading and streaming by all Internet users of music (56%), online videos (40%), movies (20%) and television (17%) is growing rapidly, especially among younger users who reported, in most cases, double the amount of engagement compared to other users
- Online games have broad appeal: 37% across all Internet user age groups have played games online
- As broadband use and Internet speeds increase, downloading content for later use as opposed to streaming content in real time is increasing as well, particularly among youth and younger Internet users (12–29)
- Almost half of all Internet users (47%) have downloaded content free-of-charge and potentially illegitimately, when knowing similar content for a fee was available online
- While only 13% of Canadian Internet users have paid to download content online, nearly 70% are willing to accept advertisements along with the content
- The most popular downloaded content paid for by users was music (57%) followed by games (8%) and videos (7%)
- File sharing has been used by 23% of Internet users, but the incidence is much higher among the most active users
- Podcast downloading activities remain low, undertaken by only 16% of Internet users (5% do so at least once a week)
- Only 15% of Internet users read books online and less than 4% do so regularly (at least once a week)

Impact of the Internet on Family, Friends and Other Contacts

Canadians, particularly those under age 30, have adopted community and social networking activities as part of their typical communication routines, shifting some interaction time from face-to-face to virtual.

- On average, Internet users report that they spend an average of 16.3 hours per week with family and 8.6 hours per week with friends
- Compared to other Internet users, heavy Internet users report spending more time with family (18 hours per week) and a little more time with friends (9.3 hours per week), suggesting that Internet use may not be displacing time with friends and family
- Most Internet users do not think that being online has had an impact on their contact with friends and family
- Those who do perceive an impact believe that the Internet has increased their contact with friends and family, but decreased their face-to-face time, especially with family; this may account for the extra time spent engaged online
- English-speaking users are much more likely than French-speaking users to use the Internet to increase their contacts with family, friends and others who share their interests
- One in three Canadian Internet users (30%) feels being online has increased her/his contact with others who have similar hobbies or engage in similar recreational activities
- More Internet users report that the Internet has decreased time spent with those of similar political interests (14%) or religious beliefs (15%) than report it has increased time spent with these contacts (10% and 8%, respectively)

Perception of Parents Versus that of Youth and Children

Adult perceptions about the online activities of the children and youth in their household reveal, among other things, some concerns but also considerable confidence in the ability of those in the 12–17 age group to browse safely. In many cases, adult perceptions contradict reported online behaviour and practices of youth themselves, who are even more confident about their ability to browse safely.

- Adults are much more likely than are youth to worry about Internet safety issues but are generally confident that their children aged 12–17 have the necessary skills to browse the Internet safely
- Although socializing when online is usually seen as a virtual phenomenon, screen sharing — being online with others present — is fairly common, especially among younger Internet users
- Adults report a much higher level of monitoring and participating in the online activities of teenagers than the youth themselves report
- Adults significantly underestimate the time youth in their household spend online (adult perception: 11.9 hours per week; youth report: 16.3 hours per week)
- More adults than youth agree that youth need the Internet for social acceptance (23% of adults versus 9% of youth)
- A higher proportion of adults than youth perceive that the Internet is reducing youth's other important activities (35% of adults versus 22% of youth)

Civic Engagement and Government Online

Public use of e-government services is high and growing but civic engagement remains low. The flow of information is primarily government to public.

- Use of e-government services is relatively high and growing; more than 60% of Canadian Internet users have accessed government information online
- Civic engagement is low; fewer than one in five has communicated with an elected official or civil servant
- Civic engagement is strongly related to frequency of Internet use and social engagement online

- Canadians are not convinced of the empowerment potential of the Internet; only one in four thinks the Internet can give them more political power or influence on government
- Canadians show a strong interest in voting online (69% of Internet users)
- The majority of non-users (58%) feel more government control over the Internet is necessary, while among Internet users a plurality are opposed (44%)
- There have been modest increases in the use of government services online between 2004 and 2007, mostly in submitting forms and applications on the Internet
- The biggest increases in civic engagement and e-government are among groups whose usage was previously low; political information seeking has increased dramatically among Francophones and females

Canadian Culture Online

As the Internet provides unprecedented access to global sources, Canadians are divided in their opinions about the value of, quality of and need for Canadian content online. Cultural specificity of online content and services may be declining in importance.

- Canadians maintain moderate to high levels of consumption of various cultural content and services from offline as well as online media
- There has been a striking increase in the use of the Internet to look for cultural information (about concerts, movies, authors, and so on), from one in four in 2004 to two in three in 2007
- A majority of Internet users (60%) go online at least sometimes to access Canadian content and 17% do so often — twice as many as in 2004
- Groups more likely than average to look for Canadian content online include the most experienced Internet users, the most frequent users, and those who visit and contribute to social networking sites
- Close to half of all Internet users (46%) feel it is important to obtain information from Canadian sources, while less than one-quarter (25%) feel that it is important to obtain entertainment from Canadian sources
- Principal reasons for not seeking out Canadian content online given by those who are not inclined to do so are lack of interest and feeling that selection based on origin of content is neither relevant nor useful
- Canadians rely greatly on media that typically contain significant amounts of cultural content, spending an average of 11 hours per week watching television and the same amount of time engaged in online activities from home
- Entertainment activities attractive to younger Internet users are playing video games (23% at least weekly), downloading or listening to music (54% at least weekly) and watching videos (38% at least weekly)
- Online use of entertainment and cultural information has increased considerably since 2004
- Interest in Canadian content specifically has slightly declined since 2004, but opinion on the desirability of Canadian content online has remained stable
- In 2007 Canadian Internet users were less positive about the quality of Canadian cultural content online then they were in 2004, but perceptions of the availability and accessibility of content have improved since 2004

Consumer Behaviour on the Internet

The volume of online commerce continues to grow in Canada even though the percentage of those active in the online marketplace has not changed much since 2004.

- Nearly half of Canadian Internet users have purchased a product or service online (48%) and more than one in three reported buying something online within the month previous to the survey (38%)
- More than one-third of those who bought something online (or 15% of all Internet users) had made more than one purchase within the month prior to when the survey was conducted
- Looking online for information on products and services is the most popular e-commerce activity (77% of Internet users), indicating broad awareness of the online marketplace
- Three of every four Internet users who conduct online product research actually buy from a local retailer (77%)
- Books, stocks and bonds, clothes, music and travel arrangements are the most frequently purchased goods and services online
- Impediments to online shopping include concern about security of financial information and worries about offshore vendors
- Concern about security of financial information has declined slightly for both Internet users and non-users since 2004
- More experienced, more frequent users, and those most comfortable with new technologies are least concerned about security for online commerce, but concern remains quite high across most demographic categories
- A majority of online purchasers prefer Canadian vendors specifically (59%), while three in ten use Canadian and American sites equally (31%)
- Only 13% of those online have paid to download content from the Internet
- Almost half of all Internet users (47%) have found ways to download content available for a fee online without paying for it
- The most commonly downloaded item is music (57%)
- Of all Internet users, 23% reported that they download from a file-sharing service
- Nearly seven in ten Internet users are willing to accept advertising online
- Since 2004, the percentage of users buying online has not changed a great deal, but there has been a considerable increase in the amount and frequency of online commerce
- Visiting online auction sites, such as eBay, has increased substantially from 2004 (13%) to 2007 (46%)

International Comparisons

For most of the international comparative measures examined from the WIP study, Canada ranked relatively high in percentage of Internet users accessing online activities and services. However it is not in as strong a position as it was in 2004, as Internet use in other countries catches up with consumption levels in Canada.

- Canada remains among world leaders in Internet penetration, experience online and broadband access
- Except for gender, digital divides — age, education and income — remain important in Canada and elsewhere
- Older and lower income Canadians — though much less likely to be online than younger and wealthier Canadians — are much more likely to be online than are their counterparts in many other countries

- With more than half (51%) of those over 60 years of age online, Canada ranks first among WIP countries in Internet access for the elderly
- Canadians spend more time online at work than do those in many other countries
- Canadians are more sceptical about the reliability of information online than are residents of other countries and are below average among WIP countries in regarding the Internet as an important source of information
- Canadian Internet users rank above average among users in WIP countries with respect to regarding the Internet as an important source of entertainment
- Compared to inhabitants in other countries surveyed by WIP, Canadians spend an average amount of time with both online and offline media
- Canadians are relatively heavy consumers of news online and are relatively frequent users of e-mail and instant messaging (IM) compared to other countries
- Relative to the residents of other WIP countries, Canadians are fairly frequent non-specific browsers online and often multi-task while online
- Canadian Internet users are more likely than Internet users in other countries to report that their time online has reduced time spent with family and, to a lesser extent, friends
- Canadians are not frequent bloggers
- Canadians are quite active in the online marketplace, but are no longer the leaders they were in 2004, except in online banking
- Canadians are more likely to express concern about the financial security of online purchasing than are consumers in most other countries

1 Introduction

Welcome to ***Canada Online! The Internet, Media and Emerging Technologies: Uses, Attitudes, Trends and International Comparisons*** — the second major report of the ongoing Canadian Internet Project (CIP).

The goal of CIP is to present a snapshot — an informed Canadian perspective — of the ways our world has been transformed by the adoption of the Internet, the maintenance of a traditional media diet, and the continuing proliferation of emerging technologies. Exploring the interrelationship between these three elements and their assimilation into the everyday lives of Canadians — sometimes ubiquitous and seamless, at other times relentless and disruptive — tells much about the behaviour and attitudes of Canadians in the context of the changing media environment. It is our hope to facilitate dialogue about the many issues raised by these transformations.

Compared to most other countries around the world, Canada has one of the highest levels of Internet penetration and broadband access. Canadians have swiftly and effortlessly adopted new technologies and applications, and at the same time, have maintained a strong appetite for traditional media, finding ways to supplement rather than replace their existing media diet with newer media and activities through multi-tasking and concurrent use. The Internet, technology and media influence and shape the behaviour, attitudes and daily lives of Canadians like no other cultural, social, political or economic element in society. It is vital, therefore, that industry, the cultural sector, policy makers, content and service producers and the public have the best possible information about Canadians' relationship to the Internet, technologies and media to accurately assess and respond to the impact of the rapidly change media environment.

CIP conducted its first national survey in 2004 and published its baseline report, *Canada Online! A Comparative Analysis of Internet Users and Non-users in Canada and the World: Behaviour, Attitudes and Trends,* in 2005. That report quickly became one of the most comprehensive sources of information and analysis about the Internet, emerging technologies and media use in Canada. It provides a wide-ranging assessment of Canadian behaviour and attitudes related to both conventional and newer media, and discusses the potential impacts of changing consumption patterns on the everyday lives of Canadians. It also places Canada in international perspective, comparing Canadian results with those of other countries. The scope and depth of the CIP survey and results are unmatched.

As promised in the initial, benchmark study, CIP followed up the 2004 survey with an even more comprehensive questionnaire in 2007. This current report is based on an examination of these two national surveys. In 2004, 3014 telephone interviews were conducted with Canadians 18 years and older, and in 2007, 3,150 telephone interviews were conducted with Canadians 12 years and older. In both cases, respondents — Internet users and non-users — were probed about their motives, attitudes and media use patterns. The resulting data sets, along with the international data compiled by the World Internet Project (WIP), of which CIP is a member, allow investigation of differences over time. As Canada belongs to a world where the Internet, technology, and media are central to our cultural, social, economic and political lives, independent analysis of the implications of these developments is fundamental.

As we wrote in 2004, *"The key objective of this research project is to understand how our lives are being transformed by the emergence of new digital content and distribution channels."*

Since 2004, the spread of high-speed broadband, mobile applications and services, along with innovative forms of interactive online activities, has underlined the need for longitudinal studies that help us understand adoption patterns and the effect of utilization.

CIP surveys have large samples, as well as specialized sub-samples, which support unique forms of analysis. In 2007, the average length of a respondent interview was 38 minutes overall (45 minutes for Internet users and 19 minutes for Internet non-users); these interviews provide the data for the thorough and far-reaching analysis presented here. The benchmarks established in the first survey allow us to identify and analyze trends and change in the use patterns and perceptions of both old and new media, comparing 2004 to 2007. As will be seen in this report, this trend analysis is quite revealing.

Overall, the 2007 data comprise nearly 900 variables and indices on a wide range of subjects, including information on how often Internet users undertake online activities and the impact of various levels of Internet engagement on traditional media use. The study provides important data on ownership and use of digital devices, including those that deliver mobile Internet access. CIP offers a sound foundation for a broad understanding of the continuing impact traditional and newer media have on our day-to-day lives.

Among several changes, the 2007 iteration of CIP has two special features and innovations:

- along with a sample of 2,750 randomly selected respondents 18 years and older, a youth sample of 400 respondents aged 12–17 was included

- a panel of nearly 400 respondents interviewed in the 2004 survey were re-interviewed in 2007, creating a longitudinal panel that will provide for further trend analysis in the future.

Inclusion of the youth sample allows for a comparison of responses from this age group to those of parents with children of the same age and younger, and to look more closely than was possible in 2004 at the groups most likely to be early adopters of emerging technologies and new online applications — youth, young adults and students.

As a research program, CIP has a number of distinctive features:

- CIP is constituted as an active consortium of ten institutional partners representing academic, government and industry constituencies, each of which contributed sector-specific issues for analysis and directly participated in the design and development of the questionnaire.

- CIP is an ongoing, longitudinal research project that assesses trends and developing patterns of behaviour and attitudes over time.

- CIP uses a comprehensive survey that provides unmatched detail on important aspects of the attitudes and media use patterns — online and offline — of Canadian Internet users.

- CIP provides detailed and innovative analysis of media use and attitudes of Canadians who were not using the Internet at the time of the survey, with attention to their reasons for not being online and their views on the Internet.

- CIP presents an analysis of how non-users and occasional users compare with light, moderate and heavy users.

- CIP analyzes changes in consumption patterns of the Internet across a wide range of activities and applications.

- CIP examines attitudes towards the Internet as compared to traditional media.

- CIP compares Canadian media use across a range of demographic, behavioural and attitudinal variables and indices with that of other countries participating in the 2007 WIP study.

CIP is a partner in the World Internet Project (WIP) — an academic consortium of research centres in more than two dozen countries around the world. All WIP members ask a subset of approximately 30 common questions in their national surveys, from which more than 85 variables and indices have been created for international comparisons. Currently, there are 28 countries participating in the WIP study, of which 13 members conducted a survey in 2007. Chapter 14 of this report presents selected data from these surveys comparing Canada to a diverse group of countries that includes some of the earliest adopters of new media. WIP will be releasing its first comprehensive international comparative report in fall 2008.

Each chapter in this report is based on a systematic analysis of a set of basic variables and some more novel variables, such as motive for going online and participation in social networking. Some of the basic variables for comparison are listed below.

Standard demographics:

- gender
- age
- life stage (student, employed, retired)
- income
- education
- region of residence
- language (English, French)
- community size

Adoption and consumption patterns:

- Internet user versus non-user
- experience online and offline
- frequency of Internet use (penetration levels)
- level of Internet engagement (consumption in average hours per week)
- broadband access
- location used for Internet access (home, work, school, home of friend or relative, public place, other)
- device used for Internet access (wired PC, wireless PC, mobile device)

Attitudes and behaviour:

- unique behavioural patterns (multi-tasking, social networking, time spent with friends and family, intended and aimless online exploration, and so on)
- predominant information seekers compared to predominant entertainment seekers

These variables and others provide the basis for creating profiles of various online and offline engagement patterns and for examining the strength of relationships among similar and diverse groups.

Each chapter presents a specific digest of findings and analysis emanating from thematically related components of the data. Each offers a summary of key findings, insights, conclusions, and trends comparing related findings from 2004 with 2007. The following is a synopsis of each chapter:

Chapter 3 examines penetration levels and patterns of Internet use and non-use across key demographic and behavioural variables.

Chapter 4 provides a detailed analysis of those who do not currently use the Internet.

Chapter 5 explores the relationship between Canadians and information and communication technologies (ICTs), including the adoption of digital devices and perceived comfort with new technologies.

Chapter 6 presents a detailed examination of traditional media use by Canadians, with particular attention to the impact of Internet use on traditional media.

Chapter 7 looks further at the reasons Internet users access online media and the concerns they have about being online.

Chapter 8 reviews new and innovative Internet applications as well as those more commonly used, with particular attention to early adopters of new services.

Chapter 9 examines the various ways Canadians seek information and compares those who go online specifically for information with those who spend more time online seeking entertainment.

Chapter 10 explores adoption patterns for new online activities and services — and specifically, those that facilitate creative use and engagement of the Internet.

Chapter 11 examines trends in civic engagement and e-government.

Chapter 12 explores the extent to which Internet users seek Canadian content online and their attitudes towards it.

Chapter 13 deals with the online, e-commerce marketplace.

Chapter 14 draws on the WIP common database to explore where Canada stands in relation to other countries on a series of key measures of Internet access and use.

And finally, Chapter 15 reviews key salient issues and findings discussed throughout the report.

As the founder of WIP, Dr. Jeffrey Cole (USC Annenberg School of Communications, Center for the Digital Future), observed in the first US–WIP report published in 2001, *Surveying the Digital Future, 2001,*

> *Had this type of research been conducted on the evolution of television as it emerged in the late 1940's, the information would have provided policy makers, the media, and ultimately historians with invaluable insights about how broadcasting has changed the world. Our objective is to ensure that the World Internet Project and its yearly reports capitalize on the opportunity that was missed as television evolved. This way we can better understand the effects of the Internet as it grows, and not as a postscript after it has already matured.*

It is our sincere hope that ongoing reports from CIP will achieve these goals.

Fred Fletcher
Charles Zamaria

2 Technical Summary and Research Methods

2.1 Overview — Adult Sample (18 years +)

- The study population comprised people of at least 18 years of age, living in the ten Canadian provinces in private homes, able to express themselves in either French or English.

- Interviews were conducted between June 25 and July 31, 2007.

- In total, 2,750 telephone interviews were completed: 2,084 were conducted from Research House's Toronto call centre (2,079 in English and 5 in French); 666 were conducted from Research House's Montreal call centre (636 in French and 30 in English).

- The margin of error for a sample of 2,750 respondents is 1.9%, 19 times out of 20.

    - 2.2% for Internet users (n=2,029)
    - 3.7% for Internet non-users (n=721)
    - 3.9% for French speakers (n=641)
    - 2.1% for English speakers (n=2,109)

- The response rate was 6%.

- Of the 2,750 respondents, 399 had participated in the study in 2004 and represent the panel sample for the continuing longitudinal study.

- A probabilistic sampling model was used, which ensures a random and representative selection from all eligible individuals belonging to the study population.

- For the random selection of respondents, the method of the "next birthday" was applied using the following question: "Of those in your household who are at least 18 years of age (and speak English/French), may I speak with the person who will next celebrate his/her birthday?"

- No substitution was authorized unless the selected respondent was unavailable for the entire duration of the study, and nine call-backs were made so as to be able to question the individual selected from the household.

- The sample was built using a mix of directory listed and unlisted numbers. This methodology, offered by ASDE Canada Survey Sampler, gives equal chance to unlisted as listed households to participate in the survey. As per the sampling company's recommendation, a random digit dialling (RDD) sample was generated in the following proportion: 80% of the sample was listed in the electronic telephone directory and 20% was unlisted.

- The adult sample was distributed as shown in Table 2-1.

Table 2-1 Sample distribution across geographic area (Adult sample)

Geographic Area	Sample Size
Newfoundland	44
Prince Edward Island	16
Nova Scotia	88
New Brunswick	72
Quebec	666
Greater Montreal Area	*290*
Rest of Quebec	*376*
Ontario	1046
Greater Toronto Area	*474*
Rest of Ontario	*572*
Manitoba	99
Saskatchewan	88
Alberta	276
British Columbia	355
Greater Vancouver Area	*158*
Rest of British Columbia	*197*
Total	**2750**

- Results were weighted using the following three variables: region, gender and age (weighting data provided by Statistics Canada, 2006 census).

- Specifically, the adult data were weighted as shown in Tables 2-2 to 2-4.

Table 2-2 Sample weighting by region (Adult sample)

Region	Target Weight	Unweighted Count	Weighted Count
Newfoundland	0.016041	44	44
Prince Edward Island	0.004311	16	12
Nova Scotia	0.028988	88	80
New Brunswick	0.023166	72	64
Quebec	0.239472	666	659
Greater Montreal Area	*0.115373*	*290*	*317*

Region	Target Weight	Unweighted Count	Weighted Count
Rest of Quebec	*0.124099*	*376*	*342*
Ontario	0.385899	1046	1061
Greater Toronto Area	*0.162263*	*474*	*446*
Rest of Ontario	*0.223636*	*572*	*615*
Manitoba	0.036444	99	100
Saskatchewan	0.030724	88	84
Alberta	0.104417	276	287
British Columbia	0.130539	355	359

Table 2-3 Sample weighting by gender (Adult sample)

Gender	Target Weight	Unweighted Count	Weighted Count
Male	0.483142	1371	1329
Female	0.516858	1379	1422

Table 2-4 Sample weighting by age (Adult sample)

Age	Target Weight	Unweighted Count	Weighted Count
18–29	0.197755	362	527
30–44	0.276507	671	737
45–59	0.285702	850	762
60+	0.240036	780	640

- The average lengths of the adult interviews are shown in Table 2-5.

Table 2-5 Average length of interviews (Adult sample)

Interview Time	Total (minutes)	English (minutes)	French (minutes)
Overall	38.0	39.6	31.0
Internet Users	44.5	45.5	40.2
Internet Non-Users	19.3	20.5	17.1

- Of 2,750 respondents, 1,923 agreed to participate in a future study without being offered an incentive. This figure increased to 2,023 when an incentive was offered.

2.2 Overview — Youth Sample (12–17 years)

- The study population comprised people between 12 and 17 years of age, living in the ten Canadian provinces in private homes, able to express themselves in either French or English.

- Interviews were conducted between July 5 and July 29, 2007.

- In total, 400 telephone interviews were completed: 303 were conducted from Research House's Toronto call centre (302 in English and 1 in French) and 97 from Research House's Montreal call centre (95 in French and 2 in English).

- The margin of error for a sample of 400 respondents is 4.9%, 19 times out of 20.

    - 5.0% for Internet users (n=389)
    - 29.6% for Internet non-users (n=11)
    - 10.0% for French speakers (n=96)
    - 5.6% for English speakers (n=304)

- The response rate was 2%.

- Of the 400 interviews, 18 were completed in a household where the parent also completed the survey.

- A probabilistic sampling model was used, which ensures a random and representative selection from all eligible individuals belonging to the study population.

- For the random selection of respondents, the method of the "next birthday" was applied using the following question: "Of those in your household who are between 12 and 17 years of age (and speak English/French), may I speak with the person who will next celebrate his/her birthday?"

- No substitution was authorized unless the selected respondent was unavailable for the entire duration of the study, and nine call-backs were made so as to be able to question the individual selected from the household.

- The sample was built using a mix of directory listed and unlisted numbers. This methodology, offered by ASDE Canada Survey Sampler, gives equal chance to unlisted as listed households to participate in the survey. As per the sampling company's recommendation, a random digit dialling (RDD) sample was generated in the following proportion: 80% of the sample was listed in the electronic telephone directory and 20% was unlisted.

- The youth sample was distributed as shown in Table 2-6.

Table 2-6 Sample distribution across geographic area (Youth sample)

Geographic Area	Sample Size
Newfoundland	6
Prince Edward Island	2
Nova Scotia	13
New Brunswick	10
Quebec	97
Greater Montreal Area	*34*
Rest of Quebec	*63*
Ontario	156
Greater Toronto Area	*68*
Rest of Ontario	*88*
Manitoba	16
Saskatchewan	13
Alberta	39
British Columbia	48
Greater Vancouver Area	*11*
Rest of British Columbia	*37*
Total	**400**

- Results were weighted using the following three variables: region, gender and age (weighting data provided by Statistics Canada, 2006 census).

- Specifically, the youth data were weighted as shown in Tables 2-7 to 2-9.

Table 2-7 Sample weighting by region (Youth sample)

Region	Target Weight	Unweighted Count	Weighted Count
Newfoundland	0.016041	6	6
Prince Edward Island	0.004311	2	2
Nova Scotia	0.028988	13	12
New Brunswick	0.023166	10	9
Quebec	0.239472	97	96
Greater Montreal Area	*0.115373*	*34*	*46*

Region	Target Weight	Unweighted Count	Weighted Count
Rest of Quebec	*0.124099*	*63*	*50*
Ontario	0.385899	156	154
Greater Toronto Area	*0.162263*	*68*	*65*
Rest of Ontario	*0.223636*	*88*	*89*
Manitoba	0.036444	16	15
Saskatchewan	0.030724	13	12
Alberta	0.104417	39	42
British Columbia	0.130539	48	52

Table 2-8 Sample weighting by gender (Youth sample)

Gender	Target Weight	Unweighted Count	Weighted Count
Male	0.483142	200	193
Female	0.516858	200	207

Table 2-9 Sample weighting by age (Youth sample)

Age	Target Weight	Unweighted Count	Weighted Count
12	0.160131	27	63
13	0.163894	56	65
14	0.167487	67	66
15	0.171155	63	68
16	0.171779	69	68
17	0.165554	114	66

- The average lengths of the youth interviews are shown in Table 2-10.

Table 2-10 Average length of interviews (Youth sample)

Interview Time	Total (minutes)	English (minutes)	French (minutes)
Overall	34.7	34.7	34.4
Internet Users	35.2	35.3	35.1
Internet Non-Users	14.7	15.1	13.7

2.3 Overview — Combined/Merged Sample (12 years +)

- The study population comprised people of at least 12 years of age, living in the 10 Canadian provinces in private homes, able to express themselves in either French or English.

- The combined/merged sample was constructed by combining cases and results from the two surveys conducted: Adult sample (18 years +, n=2,750) and youth sample (12 years +, n=400)

- Two independent questionnaires were designed for the adult and youth samples respectively. The majority of questions asked in both questionnaires were in common for both samples. However, several questions were posed of adults only or youth only and are specified in the survey questionnaire accordingly. In cases where different components of similar questions were asked, the responses were aggregated and averaged to obtain a common index for comparison of adult and youth responses.

- Interviews were conducted between June 25 and July 31, 2007.

- A total of 3,150 telephone interviews were completed: 2,387 were conducted from Research House's Toronto call centre (2,381 in English and 6 in French) and 763 from Research House's Montreal call centre (731 in French and 32 in English).

- The margin of error for a sample of 3,150 respondents is 1.8%, 19 times out of 20.

    - 2.0% for Internet users (n=2,415)
    - 3.6% for Internet non-users (n=735)
    - 3.6% for French speakers (n=737)
    - 2.0% for English speakers (n=2,413)

- The overall response rate was 5%.

- The combined/merged sample was distributed as shown in Table 2-11.

Table 2-11 Sample distribution across geographic area (Combined/Merged sample)

Geographic Area	Sample Size
Newfoundland	50
Prince Edward Island	18
Nova Scotia	101
New Brunswick	82
Quebec	763
Greater Montreal Area	*324*
Rest of Quebec	*439*
Ontario	1202

Geographic Area	Sample Size
Greater Toronto Area	*542*
Rest of Ontario	*660*
Manitoba	115
Saskatchewan	101
Alberta	315
British Columbia	403
Greater Vancouver Area	*169*
Rest of British Columbia	*274*
Total	**3037**

- Results were weighted using the following three variables: region, gender and age (weighting data provided by Statistics Canada, 2006 census). The youth respondents were weighted down to their corresponding proportion in the Canadian population. In so doing, the total weighted count is 3,037 (instead of 3,150).

- Specifically, the combined/merged data were weighted as shown in Tables 2-12 to 2-14.

Table 2-12 Sample weighting by region (Combined/Merged sample)

Region	Target Weight	Unweighted Count	Weighted Count
Newfoundland	0.016041	50	49
Prince Edward Island	0.004311	18	13
Nova Scotia	0.028988	101	88
New Brunswick	0.023166	82	70
Quebec	0.239472	763	727
Greater Montreal Area	*0.115373*	*324*	*350*
Rest of Quebec	*0.124099*	*439*	*377*
Ontario	0.385899	1202	1172
Greater Toronto Area	*0.162263*	*542*	*493*
Rest of Ontario	*0.223636*	*660*	*679*
Manitoba	0.036444	115	111
Saskatchewan	0.030724	101	93
Alberta	0.104417	315	317
British Columbia	0.130539	403	396

Table 2-13 Sample weighting by gender (Combined/Merged sample)

Gender	Target Weight	Unweighted Count	Weighted Count
Male	0.483142	1571	1467
Female	0.516858	1579	1570

Table 2-14 Sample weighting by age (Combined/Merged sample)

Age	Target Weight	Unweighted Count	Weighted Count
12	0.015130	27	46
13	0.015485	56	47
14	0.015825	67	48
15	0.016171	63	49
16	0.016230	69	49
17	0.015642	114	47
18–29	0.179071	362	527
30–44	0.276507	671	737
45–59	0.285702	850	762
60+	0.240036	780	640

2.4 Overview — Additional Details

- Community size variable:
    - Urban: 1,000,000 inhabitants and over
    - Semi-urban: 100,000 to 999,999
    - Semi-rural: 5,000 to 9,999
    - Rural: Fewer than 5,000

- An independent t-test was performed for means at 95% and 99% confidence levels.

- An independent z-test was performed for percentages at 95% and 99% confidence levels.

- Chi2: Each category (e.g., gender) was compared to the total. If it was significant, there was considered to be a relationship between the category and the variable.

2.5 Outliers Treatment

- Outliers for each continuous estimate of hourly usage, yearly tenures, and so on were treated according to the following standards: distributions were Windsorized, a procedure where data distribution outliers are set back to a value equal to the mean of the distribution plus either two or three standard deviations above that mean. The choice of two or three standard deviations depends upon the skew and shape of the top tail of the distribution being treated. Top tails values that are slow and continuously declining were set back to +3 standard deviations above the mean of the original distribution; discontinuous or fragmented observations in the top tail not associated with a gradual decline in self-reports of time/year use were set back to +2 standard deviations above the mean.

- These set backs were conducted, in the case of time–use estimates, on each separate distribution of the device by location combinations, not after first aggregating by device or by location.

- Outliers were treated separately for the adult and youth sub-samples because there was no a priori reason to expect the location- and device-based usages of these two populations to be the same. In addition, separate adult-based setbacks were chosen so as to be consistent with the sampling, data treatments and reporting contained in the CIP 2004 study, where youth were not surveyed.

- Determinations of the setback points for each question are based on weighted data.

- Determinations of the setback points for each question are based, in general when analyzing survey responses, on analysis of the distribution of data produced by the subgroup actually asked the question. However, in some cases, the base of analysis for determining setbacks was the population to which generalizations were to be made. For example, some respondents who use the Internet report not using any mobile devices to access the Internet and were therefore subsequently (and logically) not asked how many hours they spend accessing the Internet on devices they do not use.

- However, when determining the mean and standard deviation of hourly usage of each of these devices, and importantly the setback points for outlier treatment, all Internet users, regardless of use or non-use of these devices, and whether or not they therefore were asked to report their hourly usages, were considered as the base for analysis.

- This means that zeros were assigned for hourly usage of devices among Internet users not using a particular device and these zeros were incorporated in the calculation of means, standard deviations and setbacks for each device reported (unless otherwise stated). This is tantamount to basing the outlier treatment — device-by-device crossed with location of access-by-location of access — on the total population of Internet users, rather than on the population of Internet users that accesses the Internet using a particular device, in a particular location.

- While this theoretical and practical approach can be questioned as to its appropriateness, it simplifies the analysis a great deal; a common base for analysis and population generalization is now assumed (i.e., Internet users) rather than having to vary the base for analysis (and the population to be generalized to) on a device-by-device by location-by-location basis. This is a reasonable, “mid-range” approach (one would not likely chose to extend this population and make generalizations about the entire Canadian population’s Internet hourly usage, for example, which would necessitate adding zeros for all Canadian non-Internet users to the calculations). Where applicable, information about all the time

estimation questions and an indication of both the sub-sample asked each question and the filter prepared for and contained is provided with summary charts and tables.

2.6 Missing Data Protocol

- "Don't know" and "Refused" responses (DK, code=7, 77, 777 or 7777, and so on, as appropriate to the number of fields required to capture data for a self-report variable; RF, code=9, 99, 999 or 9999, and so on, as appropriate) were not assumed to represent self-reports of zero. Therefore no imputations were made for such reports and these data were removed from the analysis in general, rather than set to a zero estimate (hours, years).

- In almost all cases this represented a low loss of respondents, though the problem advances when sums of component time estimates are made (e.g., overall hours used to access the Internet from any location using any device). However, it was determined that for simplicity such cases would not be zeroed and listwise deletions would be acceptable when analyzing variables implicating them.

- A practical result of this decision is that, since device- or location-based mean time use estimates will be supported by differing numbers of validly reporting respondents, the mean overall usage calculation based on the sum of these individual estimates will not equal the mean number of hours computed for the separate, overall estimate provided in a variable that captures "total hours on Internet." The reason is because the latter variable sums across device by location combinations within a respondent first, before averaging across respondents, and as such is a diminished subsample of all those users reporting complete data across all devices and locations (i.e., it is the group of respondents based on listwise deletion; those respondents reporting a DK or RF for any one estimate are dropped from the base of analysis).

- While the respondent loss is not severe and the mean differences between the methods not great as a result of adopting this procedure, for database users requiring such consistency between the two estimates, or willing to trade off respondent loss over complexity, filters have been provided in the data file that select only those respondents participating in the index of total hours used in both cases, for total Internet hours (C2.083FL) and a constructed index of total selected traditional media use (C2.042F). That is, the listwise deletion subgroup can be intentionally selected versus passively produced by procedural default.

- When activated, these filters ensure that the sum of the individual device and location usage mean estimates will equal the total usage variable mean estimate, since both will be based upon that subsample of respondents providing a time–use estimate for each and every device by location combination.

2.7 Analytic Methods Steps for Hourly Time Estimations

- Several time measure results are procured from the survey. The most comprehensive responses are found in two series of variables: Media use, non-Internet (C2.030 – C2.042), and Internet use (C2.076 – C2.083.)

- The four-digit hour/minutes codes were converted to an expression of hours to two decimal places.

- Filter syntax was created to isolate respondents asked each of the questions to be treated (C2.083FL for Internet time use and C2.042FL for total selected traditional media use.) In practice, the same filters were used for large numbers of questions asked along each contingent question sequence wherein time estimates are reported (i.e., all respondents were "filtered" for the media use estimates, Internet users or Non-users were filtered for the sequence of device by location time use estimates, respondents with children aged 12–17 who were Internet users were asked questions contingent on that status and so must be used as the filtered base group for analysis, and so on).

- SPSS user-defined missing values were assigned to the codes for Don't know and Refused responses (e.g., 77s and 99s were set to SPSS "MISSING").

- Data for hours/minutes and years/months were examined to understand their patterns of missingness (i.e., system missing because they were not asked the question, zeros were to be assigned in creating new variables, and so on). For example, a large number of respondent-reported missings (Don't know or Refused) were noticed to have occurred in monthly estimates across two questions (C2.072 and C2.232) even though a valid yearly estimate had first been reported and recorded. To avoid a listwise deletion for these cases when the formula for total yearly usage was computed, monthly reports of "0 months" (note: not "6 months") were assumed in these cases and the data were edited in accord with this assumption prior to conducting the calculations.

- After applying the filter appropriate for each time use estimation question, and assigning "0" time use estimates as required within the respondent base filtered and thus under consideration, the response distributions (frequency report and graphical depiction) and summary description statistics (means, standard deviations, skew and kurtosis) were examined variable by variable. Setbacks of +3 standard deviations were indicated in all but two cases from among 37 variables thus examined. In these 35 common cases, a high skew but slowly diminishing top tail supported the application of the +3 standard deviation rule.

- The data were set back for each of these 37 variables by creating a parallel set of new variables whose naming added the suffix "R" for "Recoded" to the root variable name, in most cases. Both the original and recoded versions of these variables appear in the data file, though only the "R" variables were used in reporting. Note that when creating new variables that incorporate "user missings," the new variables must also be assigned with user missings (77, 7777, 99, and 9999) and labelled.

- Finally, all indexes and other "built" variables that use or depend on the construction of these variables were then created.

- Given restrictions on character length for SPSS format variable names, some built variables do not maintain the "R" suffix. However, the respective variable label does mention that the outlier treatment has been applied.

- A series of variables for Internet time use and selected traditional media time use were also created from the subsample of specific users only, in which case values of zero were not included as valid responses. The suffix for most of these variables is "S" (i.e.; C2.083HS – C2.083OS for time spent on the Internet and C2.030SS – C2.042SS for time spent using selected traditional media).

2.8 Database — 2004

- Research methods for the 2004 database and study are provided in the report, *Canada Online! A Comparative Analysis of Internet Users and Non-users in Canada and the World: Behaviour, Attitudes and Trends 2004.* Most methods used in 2004 are similar to those employed for the 2007 database and study.

- In comparison to 2007, the most significant differences in research methods employed for the 2004 database are as follows: the 2004 sample includes only adults 18 years and older (not respondents 12 years and older as in 2007), and Don't know and Refused responses were zeroed and included as valid responses for purposes of determining outlier treatment. As stated, Don't know and Refused responses were not included as valid for purposes of determining outlier treatment in the 2007 dataset.

- In cases where data from 2004 are compared with data from 2007, only respondents 18 years and older are used from both samples for this analysis.

- Differences caused by variance in outlier treatment (2004 versus 2007) are not material.

2.9 Significance Test Standards

- Unless otherwise stated in this publication, differences reported are statistically significant at the .01 level ($p \leq .01$) throughout.

3 Patterns of Internet Use — Overall Profile

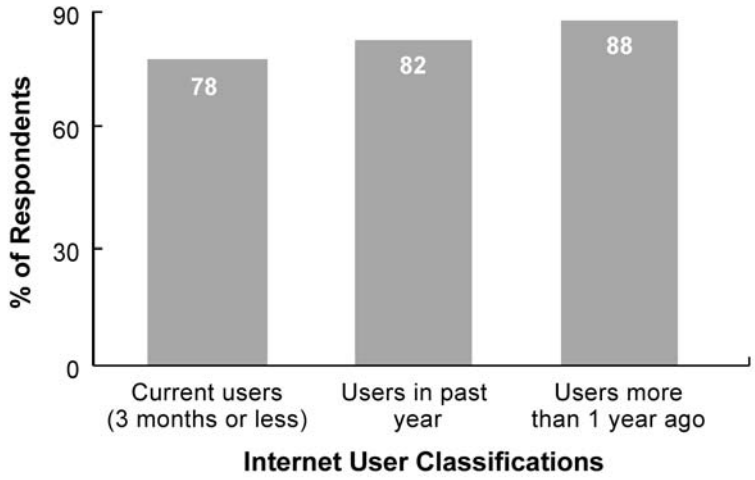
3.1 Key Findings

- Today nearly four in five Canadians are online; penetration levels across Canada have reached 78% for those 12 years of age and older
- Of all Canadians, 88% have been online at one time or another
- Adoption levels and time spent online have increased considerably since the Canadian Internet Project's benchmark study in 2004
- Internet use is almost universal (96%) among those 12–17 years of age
- A significant number of adult Internet non-users report that children (less than 12 years old) and youth (12–17 years old) in their households are online
- About half of Canadians over 60 years of age, including retirees, are online — a penetration rate that exceeds national levels in many countries
- As younger Canadians grow older, Internet penetration levels will increase
- Internet users in Canada are very experienced, being online for an average of approximately nine years
- Language and regional divides in Internet adoption increased between 2004 and 2007
- In terms of currently being online (defined as using the Internet in the three months prior to the survey), the gap between French-speaking Canadians (67%) and English-speaking Canadians (82%) increased from 8% in 2004 to 15% in 2007; the gap is much smaller for those who have been online in the past year: 77% of Francophones and 85% of Anglophones
- There are more intermittent or occasional users in the Francophone than in the Anglophone community
- While Canadians use many different languages while on the Internet, most use English, regardless of the language they first learned
- Other Internet adoption divides exist in several demographic categories: gender, income, education, professional status, occupation and community size; these gaps are decreasing over time as Internet use grows in traditionally marginalized groups (those with lower income and education levels, inhabitants of smaller communities, blue collar tradespeople and so on)
- Growth of Internet adoption in smaller towns and villages is much stronger than in larger cities as technical deployment and accessibility in these areas becomes less difficult
- Home is the predominant location for accessing the Internet and is where people spend the most time online; 94% of Internet users go online at home
- Only one-third of Internet users go online via wireless devices and just over one in ten access the Internet through cell phones
- While Internet access from wireless devices and in public locations remains relatively low, younger Canadians are increasingly making use of wireless and mobile technology to access the Internet from locations outside their homes
- Canadians that are online tend to be heavy Internet users — 40% use the Internet 15 hours or more each week
- Internet users in 2007 spent an average of 17.0 hours per week online, a substantial increase from the 2004 average of 13.2 hours per week
- Young adults (aged 12–29) are the heaviest users among all Canadians
- Those who use a broadband connection spend twice as much time online as do those without broadband

3.2 Levels of Access — Penetration Rates

Perhaps the most revealing finding from the Canadian Internet Project 2007 (CIP 2007) is the simple measure of Internet usage. In 2007, more than three-quarters of all Canadians aged 12 years and older indicated that they currently use the Internet. As Figure 3-1 indicates, if anyone who has ever used the Internet is included, penetration levels increase to an overwhelming 88%. When the survey was conducted in June to July 2007, more than 82% of all Canadians reported having been online in the past year.

Figure 3-1 When last used the Internet



CIP 2007 — C2.174, 175 (Internet user respondents, 12 years +, n=3031, n=2987)

This is a remarkable level of penetration that has grown significantly over the past several years and places Canada in the top echelon of Internet engagement — a status it shares with only a few other countries around the world. This one simple statistic clearly demonstrates that the Internet continues to be embraced by Canadians and has become an essential part of our everyday lives. Table 3-1 provides a comprehensive breakdown of Internet penetration levels across numerous demographic variables.

Table 3-1 Internet penetration levels across demographic variables

Demographic and Other Categories	Percentage from Respondent Subgroups								
	Users	**ENG**	**FR**	**BC**	**AB**	**PRA**	**ON**	**PQ**	**ATL**
	%	%	%	%	%	%	%	%	%
n	*3037*	*2335*	*702*	*396*	*317*	*204*	*1172*	*728*	*220*
Overall	**78**	**82**	**67**	**84**	**84**	**83**	**82**	**67**	**72**
Sample									
Youth (12–17)	96	97	93	97	97	100	96	93	100

Demographic and Other Categories	Percentage from Respondent Subgroups								
	Users	ENG	FR	BC	AB	PRA	ON	PQ	ATL
	%	%	%	%	%	%	%	%	%
Adult (18+)	76	80	64	82	83	81	81	64	69
					*ns	*ns			
Age									
12–17	96	97	93	97	97	100	96	93	100
18–29	90	93	83	94	88	87	95	84	89
30–44	88	93	68	97	97	97	93	67	90
45–59	78	82	65	88	86	83	84	65	60
60+	51	53	41	71	55	58	50	42	52
Life stage									
Full-time student	95	96	90	92	93	100	97	90	10
Full-time employed	87	91	74	95	93	89	92	74	76
Retired	47	50	36	56	50	55	49	37	43
Gender									
Male	80	84	67	87	86	83	85	67	71
Female	77	79	67	80	82	83	79	67	73
	*ns		*ns	*ns	*ns	*ns		*ns	*ns
Education									
High school graduate or less	67	73	52	77	72	78	73	52	63
Attended college/university	80	81	75	82	84	81	82	75	70
University degree +	90	92	83	91	96	91	92	83	87
			*ns		*ns				
Income									
<$40,000	59	63	51	66	61	67	61	52	59
$40,000–$59,999	76	81	55	78	89	82	84	55	66
$60,000–$79,999	86	87	78	96	88	86	87	77	79
$80,000+	92	94	81	96	94	94	94	82	91
Community size									
1,000,000+	83	86	76	84	—	—	88	76	—
500,000–999,999	85	85	—	—	84	87	84	—	—

Demographic and Other Categories	Percentage from Respondent Subgroups								
	Users	ENG	FR	BC	AB	PRA	ON	PQ	ATL
	%	%	%	%	%	%	%	%	%
100,000–499,999	79	82	67	91	86	83	81	65	79
5,000–99,999	76	78	67	81	87	80	75	67	77
<5,000	69	76	49	82	81	80	75	50	65
				*ns	*ns	*ns			*ns
Marital status									
Single	86	89	78	90	86	91	90	78	82
Married	80	83	64	87	87	83	84	64	70
Living with a partner	81	88	74	94	87	70	91	74	86
Separated	68	73	57	79	75	100	64	59	75
Divorced	63	70	45	84	81	64	60	47	82
Widowed	34	35	30	39	44	50	34	28	15
						*ns			
Occupation									
Professional	91	95	77	100	100	91	94	77	90
Administrator/owner of large business	96	95	100	100	100	71	100	100	0
Administrator/owner of small business	91	91	84	100	8	100	96	81	80
Office worker	89	93	75	100	92	100	91	76	88
Tradesman	75	80	41	90	82	74	82	41	50
Unskilled worker	66	74	22	75	50	100	78	22	—
Farmer/fisherman	64	65	50	100	75	71	57	33	50
Homemaker	62	71	46	77	65	92	64	46	60
				*ns		*ns			
Experience online									
<6 years	25	24	29	22	23	28	24	28	31
6–<10 years	26	25	29	24	22	28	26	29	23
10–<15 years	37	37	33	38	39	35	38	33	35
15 years +	13	13	9	16	17	8	13	10	11
Level of engagement									
Light user (<5 hours)	27	25	34	24	22	32	25	34	26

Demographic and Other Categories	Percentage from Respondent Subgroups								
	Users	ENG	FR	BC	AB	PRA	ON	PQ	ATL
	%	%	%	%	%	%	%	%	%
Moderate user (5–<15 hours)	33	32	26	36	33	32	31	36	33
Heavy user (15 hours +)	40	42	31	41	45	35	44	31	42
Broadband access									
Yes	78	80	78	88	77	77	80	78	71
No	22	20	22	12	23	23	20	22	30
Wireless device									
Yes	32	34	24	32	40	25	35	23	35
No	68	66	76	68	60	75	65	77	65

CIP 2007 — C2.071 x demographic variables (All respondents, 12 years +)

Notes:
- Column abbreviations: Internet users/English-speaking/French-speaking/British Columbia/Alberta/Prairie Provinces/Ontario/Quebec/ Atlantic Provinces.
- Demographic comparisons are based on the relative proportion of each variable category to the total Internet user population.
- Other comparisons are based upon the distribution within variable categories. In these comparisons, some totals may not add to 100% due to rounding.
- Differences not statistically significant at the .01 threshold are indicated by *ns.

3.3 Regional and Language Differences

In analyzing sub-populations, the most startling discovery is the growing regional and language divide. While British Columbia, Alberta, the Prairie provinces and Ontario share robust levels of Internet penetration between 82% and 84%, Quebec[2] and the Atlantic provinces have considerably fewer current users, 67% and 72% respectively. Internet use based on language demonstrates a consistent pattern: 82% of English-speaking Canadians are currently online compared to 67% of French-speaking Canadians. While some of the variance in regional penetration levels may be explained by the decision to oversample French-speaking Quebecers, the differences are slight.

Lower levels of Internet use in Atlantic Canada can be explained, in part, by a lag in technical infrastructure and deployment. Given its large rural territory, and as such, the difficulty in providing Internet access, Quebec faces similar infrastructure issues. While this may provide a partial explanation for the usage gap between French and English speakers in Quebec, there seem to be other factors at work here as well. While the Prairie provinces have similar geographic impediments and, therefore, the same deployment issues as Quebec, the overall level of Internet use is significantly greater there than in Quebec. Factors that may explain the lag in Quebec include the relative priority given to Internet development and infrastructure projects by other provincial governments such as Alberta and Ontario, and the continuing, albeit diminishing,

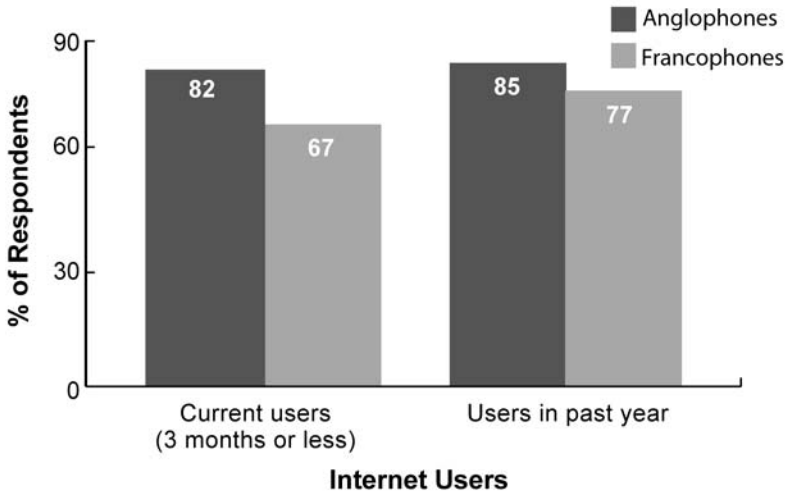
[2] In this study, the Francophone population in Quebec was intentionally over-sampled to ensure a robust sample of French-speaking Canadians and to more accurately analyse the behaviour and attitudes of the French-speaking majority in Quebec. The study thus under-represents the non-Francophone population in Quebec. While different levels of adoption and engagement in Internet activities were discovered between the two subgroups (higher levels on most measures for Anglophones versus Francophones in Quebec), these differences are not material given the relatively modest underweighting of English-speaking Quebecers.

predominance of English online. Nevertheless, the French–English gap identified here is consistent across many Internet studies.

Probing more deeply, and looking at Internet usage over a longer time period, the results indicate much less dramatic differences based on language and region. When respondents were asked if they had used the Internet in the past year as opposed to currently (or as defined in the study, in the past three months), the Francophone Quebec penetration level increases from 67% to 77%, while the rest of Canada Anglophone rate increases from 82% to 85%. The 15% difference in current Internet use rate declines to only 8% when Internet users are defined as those who have been online in the past year as opposed to in the past three months.

This finding suggests that Quebec has a higher proportion of intermittent Internet users than does the rest of Canada. Quebecers appear to be more apt than other Canadians to use the Internet for specific time periods and to relinquish access at other periods. This certainly warrants further study.
In making these comparisons, it is important to note that language first learned (English, French and Other), language of interview and regional comparisons (Quebec versus the rest of Canada) are highly correlated and, therefore, very similar in their relationship to other variables.

Figure 3-2 Internet penetration levels across language groups



CIP 2007 — C2.071c, LANGUAGE (All respondents, 12 years +, n=3037)

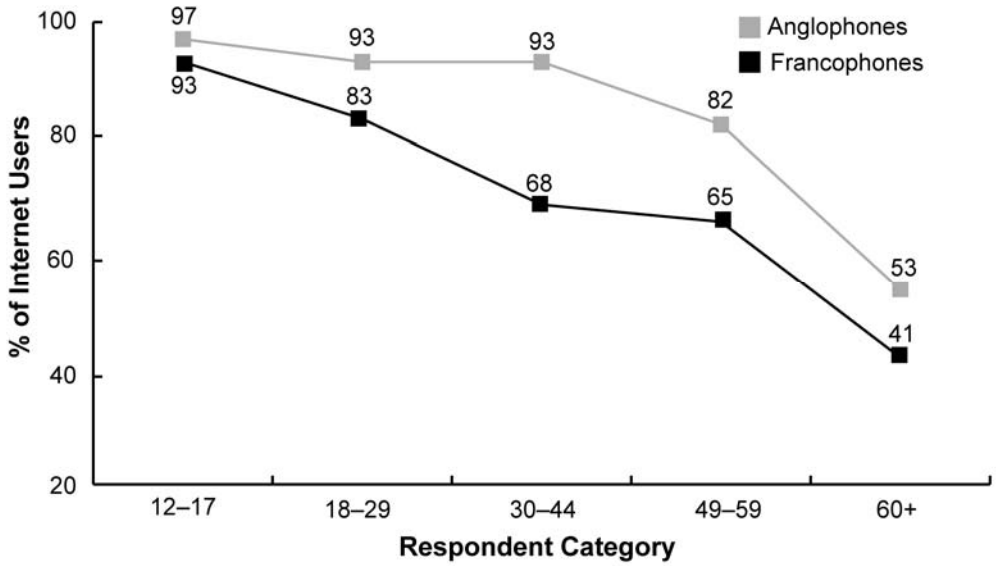
3.4 Age

Internet use is almost universal among Canada's youth: 96% of those aged 12–17 are currently online, compared to 76% of those aged 18 and older. Overall, age is inversely related to Internet penetration. However, fully half of Canadians aged 60 or older are online, a rate comparable to that of the overall population in many countries.

It is notable that differences in the rates of Internet use based on primary language spoken and region of residence are much lower for those under 30 years of age than for the population as a whole. For example, as Figure 3-3 indicates, more than 90% of both official language groups in the 12–17 age group are currently online (French 93%; English 97%). For the 18–29 age group, the gap between English and French speakers is only 10%. The greatest difference is in the 30–

44 age group, where 93% of English speakers are online, compared to only 68% of French speakers. This gap can be expected to lessen over time.

Figure 3-3 Internet use across language and age categories



CIP 2007 — C2.071c, 261a, LANGUAGE (Internet user respondents, 12 years +, n=2952)

3.5 Life Stage

In addition to age, life stage is an important determinant of Internet use. Here, we look at three categories of respondents: full-time student, full-time employed and retired. Nearly all full-time students are online (95%), compared to 87% of those employed full-time and only 47% of retired individuals. It is expected that the influence of life stage will diminish as those under 30 advance through the various life stages, maintaining their tendency to be engaged with and connected to the Internet and emerging technologies.

Consistent differences in Internet penetration rates also occur across life stages when regional and language differences are taken into account. Most prominent is the difference within the full-time employed category, where 91% of Anglophones but only 74% of Francophones are online. This may reflect a difference in work patterns.

The study also analyzed Internet penetration among those who declared themselves as stay-at-home husbands or wives. Once again, in this group a very sizable gap of 25% exists between Anglophones and Francophones who are online (71% versus 46%).

3.6 Gender

There are no significant differences in usage patterns based on gender, except in the oldest age group (60 years and older), where men (56%) are more likely to be online than are women (46%). Both male (80%) and female (76%) Canadians are relatively equally engaged in online activities. This is consistent across regional and language breakdowns within Canada.

3.7 Education and Income

Variation in Internet penetration levels across income and education categories is consistent with patterns found throughout the world. The more educated or wealthy an individual is, the more likely she/he is to use the Internet.

This finding is similar for regional and language comparisons. The greatest differences in Internet usage for Anglophones and Francophones are discovered in the least educated category (high school or less), where 73% of English-speaking versus only 52% of French-speaking Canadians are online.

When considering income, the second quartile, representing annual household earnings between $40,000 and $60,000, shows the greatest difference between Anglophones and Francophones — a gap of 26%.

3.8 Community Size

The larger an individual's community, the more likely she/he is to be online. Evidently, smaller populated communities, and most certainly rural areas, continue to face technical challenges in obtaining Internet access. This seems to be particularly true in Quebec. Quebecers in rural areas are much less likely than rural residents in other provinces to be online. In communities with populations less than 5,000, only 49% of Quebecers are current Internet users, compared to 70% in the rest of Canada. The gap is only 10% in cities over one million people.

3.9 Marital Status

Singles under 30 and over 60 years of age are more likely to be online than are those in stable relationships (married or cohabiting). In the 30–59 age group, however, people in relationships are more likely than singles to be Internet users. These patterns persist across language and regional groups.

3.10 Professional Status

The study findings indicate that penetration rates are significantly greater for skilled than for unskilled workers. This is consistent with measures for income and education. The greatest differences in Internet user levels between Anglophones and Francophones are found in the unskilled and trade worker categories (40% and 39% gaps respectively).

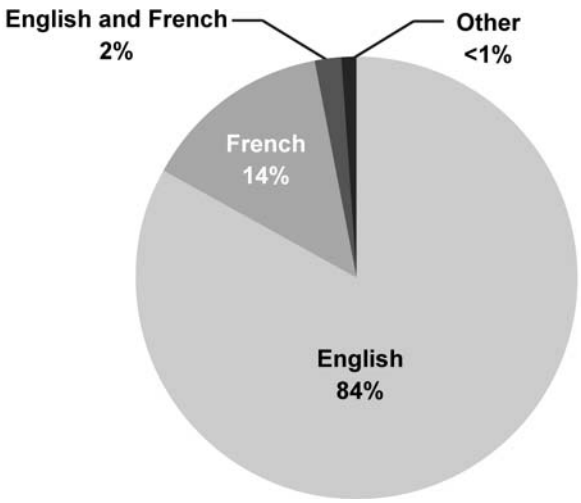
3.11 Languages Used on the Internet

English is the predominant language used on the Internet by all Canadians regardless of heritage or language first learned. Of the entire sample, 84% responded that English is the language they most frequently use on the Internet. At 14%, French is the second most-often used language, while 2% use English and French equally online. Very few others (less than 1%) use something other than English or French as their primary language while online.

Still, Canada's diversity is strongly reflected by the fact that languages other than English and French are also used online. Respondents were asked to report any secondary languages used when online. While many responded they use Canada's other national language as an alternate language (16% French, 15% English), a large proportion of Canadian Internet users also use

another language. More than 22 other languages or regional dialects (Southeast Asia, Eastern Asia, North American Aboriginal, and other European) are represented as being used online

Figure 3-4 Internet use: Primary language used online



CIP 2007 — C2.121T (Internet user respondents, 12 years +, n=2097)

It is interesting to note that Internet use is higher among immigrants than among Canadian-born residents (83% versus 76%). It is probable that the use of languages other than English or French online represent a desire on the part of immigrants to remain connected with their countries of origin. Still, English remains the lingua franca for most Internet users.

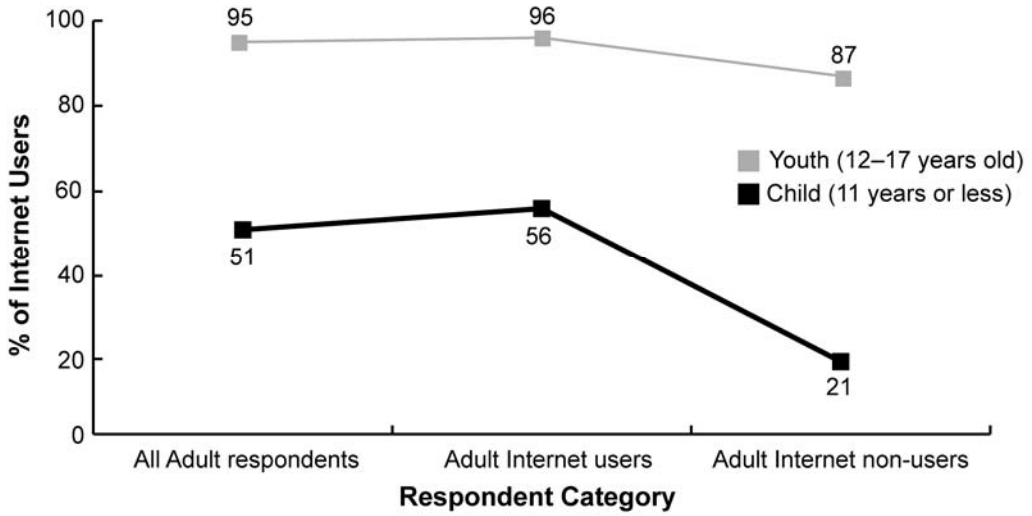
3.12 Children and Youth Online

An important innovation in CIP 2007 is a survey of a national sample of youth aged 12–17 years. As reported, the study's findings demonstrate overwhelming adoption of the Internet by young Canadians; 96% in this age group use the Internet.

In addition, in this survey adult respondents who had a child (11 years or younger) or youth (12–17 years) in their household were asked about that young person's online behaviour. The results tend to confirm the exceedingly high Internet penetration levels for Canadian youth. Reports from adults with children 11 years of age and younger in the household indicate that more than half of these (56%) are current Internet users. Moreover, those with youth in their household confirm that some 95% of these are online.

Even adults who are not themselves Internet users report that young people in their household are online. As Figure 3-5 shows, 87% of youth and 21% of children in non-user adult households are reported to be current Internet users. Evidently, access to the Internet in these cases is not necessarily at home; the Internet may be available at schools and daycare centres where child and youth family members frequent. What is quite remarkable is that for all Canadian adults, whether Internet users or non-users, 74% of all children and youth are reported to use the Internet. With increasing Internet use and comfort with technology evidenced among children and youth, there is little doubt that overall penetration levels will continue to increase and approach saturation as Canada's younger population grows older.

Figure 3-5 Internet use by child or youth as perceived by adult respondents



CIP 2007 — C2.250, 071 (Internet user respondents with child or youth in household, 18 years +, n=723)

As reported by adults (users and non-users) with children or youth in their households, the average amount of time children and youth spend online is nine hours a week. Youth (12–17 years of age) are perceived by their parents to be online approximately 12 hours per week, and children (11 years of age and younger) just over 3.5 hours per week. For most, significant increases in Internet use begin after age 11. It seems likely that younger children's time online is monitored by parents, which accounts for lower levels of engagement. Nevertheless, many children are using the Internet, whether or not their parents are themselves online.

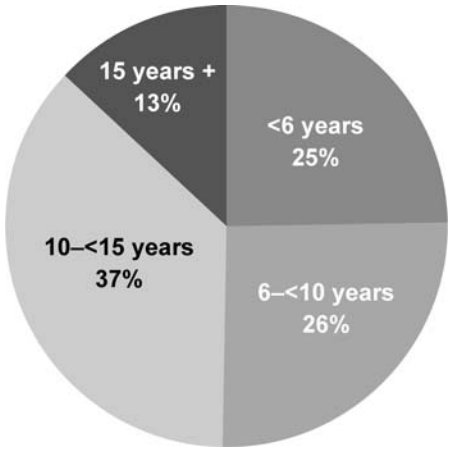
3.13 Experience Online

Figure 3-6 provides a breakdown of the length of time Internet users have been online. Overall, for all Internet users, the average length of time elapsed since they began using the Internet is 8.8 years. Half of all Internet users have been online for more than ten years, while one-quarter have been online for less than six years.

Surprisingly, 46% of Canada's youth have been online for six years or more. The average time elapsed since 12–17-year-olds began using the Internet is 5.9 years. For Canadians adults (18 years and older), the average length of time they have been online is 9.2 years. Many Canadians not only use the Internet, they also are very experienced Internet users.

In general, English-speaking Canadians have been online longer than have French-speaking Canadians: nine years compared to 8.3 years. Anglophones were earlier adopters: 51% have been online for more than ten years, while only 42% of Francophones have the same degree of experience online.

Figure 3-6 Internet use by length of time online



CIP 2007 — C2.072c (Internet user respondents, 12 years +, n=2334)

3.14 Location for Internet Access

As with the benchmark 2004 study, CIP 2007 investigated in some detail Internet usage across various possible locations of access — home, work, school, residences of friends or relatives, public places and other locations (see Table 3-2). The current study reveals stable patterns of Internet engagement for Canadians that are consistent with the previous study.

Table 3-2 Location used for Internet access across demographic variables

Demographic and Other Categories	Location Used for Internet Access					
	Home	Work	School	Friend/ relative	Public place	Other
	%	%	%	%	%	%
Variable	*C2.083HF*	*C2.083WF*	*C2.083SF*	*C2.083FF*	*C2.083PF*	*C2.083OF*
n	*2200*	*1012*	*465*	*665*	*381*	*100*
Overall	**94**	**43**	**20**	**28**	**16**	**4**
Sample						
Youth (12–17)	97	0	83	75	39	3
Adult (18+)	93	49	11	22	13	5
	**ns*					**ns*
Language group						
Anglophone	94	44	20	29	17	5
Francophone	94	38	20	24	14	3

Demographic and Other Categories	Location Used for Internet Access					
	Home	Work	School	Friend/ relative	Public place	Other
	%	%	%	%	%	%
	*ns		*ns	*ns	*ns	*ns
Region						
British Columbia	96	43	13	28	15	5
Alberta	93	51	17	27	21	10
Prairie provinces	88	39	19	30	16	4
Ontario	95	43	23	30	17	5
Quebec	94	38	19	24	13	3
Atlantic provinces	90	47	23	30	16	2
					*ns	
Age						
12–17	97	0	83	75	39	3
18–29	94	42	39	43	20	5
30–44	93	62	6	22	11	5
45–59	93	57	2	13	10	5
60+	95	17	1	9	12	3
						*ns
Life stage						
Full-time student	97	9	79	62	35	4
Full-time employed	93	71	8	21	10	6
Retired	95	0	0	8	14	3
						*ns
Gender						
Male	96	45	21	33	17	6
Female	92	42	19	24	15	3
		*ns	*ns		*ns	
Education						
High school graduate or less	95	16	40	47	23	4
Attended college/university	93	46	14	23	10	4
University degree +	94	64	9	18	18	5
	*ns					*ns
Income						
<$40,000	91	25	18	28	18	4

Demographic and Other Categories	Location Used for Internet Access					
	Home	Work	School	Friend/ relative	Public place	Other
	%	%	%	%	%	%
$40,000–$59,999	92	40	18	25	17	3
$60,000–$79,999	93	51	13	22	14	4
$80,000+	97	60	14	26	12	7
				*ns	*ns	
Community size						
1,000,000+	97	44	22	30	19	5
500,000–999,999	94	53	17	28	18	7
100,000–499,999	94	49	20	25	16	4
5,000–99,999	94	39	19	30	13	5
<5,000	88	36	18	26	13	3
			*ns	*ns	*ns	*ns
Experience online						
<6 years	90	21	27	34	18	4
6–<10 years	95	38	26	34	16	3
10–<15 years	95	56	15	23	15	5
15 years +	97	61	8	22	17	6
					*ns	*ns
Level of engagement						
Light user (<5 hours)	88	26	10	18	9	1
Moderate user (5-<15 hours)	95	39	19	23	15	4
Heavy user (15 hours +)	98	59	26	37	20	8
Broadband access						
Yes	98	46	21	30	17	5
No	96	36	14	18	10	3
						*ns
Wireless device						
Yes	98	57	25	45	25	12
No	92	36	17	20	12	1

CIP 2007 — C2.083 x demographic variables (Internet user respondents, 12 years +)

Notes:
- Demographic comparisons are based on the relative proportion of each variable category to the total Internet user population.
- Differences not statistically significant at the .01 threshold are indicated by *ns.

Canadians are most comfortable using the Internet from home. Considering the entire population, 77% of all Canadians access the Internet from home. This is a formidable penetration rate compared to most other countries around the world. Among those online, 94% use the Internet from home, compared to only 16% that use the Internet from public places, such as a library, airport or Internet café, while 43% use the Internet in their workplace and 20% use the Internet at school. More than one-quarter of Canadians online access the Internet from a friend or relative's residence. At any given time, Canadian Internet users have multiple points of access to the Internet.

These findings indicate widespread access and technological uptake from personal residences in Canada, particularly in comparison to other access locations that are more prevalent throughout the rest of the world. The comfort of using the Internet from a private and familiar location — such as one's own domicile or that of a friend or relative — seems to be important to Canadians. This may impact on Canadians' appetite for online activities and applications, as is discussed in later chapters. The lack of Internet consumption from more public locations, as is much more common in other parts of the world, may reflect not only Canada's higher levels of technological development — in this case accessibility at home — but also a preference for privacy and intimacy during online engagement. This may result in different patterns of online activity in Canada than in other countries.

This study found no significant differences between English-speaking and French-speaking Canadians as to where they accessed the Internet. Regionally, Ontario has a slightly higher rates of home use compared to other regions in Canada, ranging from 95% in Ontario to a low of 88% in the Prairie provinces. Youth are much more likely than adults to use the Internet at the homes of friends or relatives — 75% versus 22%. As well, 12–17-year-olds use the Internet far more often in public locations than do those 18 years and older — 39% versus 13%. The Internet seems to be more of a movable feast for youth.

Canada's youth population also feels comfortable accessing the Internet from less private locations. This is fascinating given that youth are much more inclined than adults to use the Internet for social engagement. Increased socializing and networking via the Internet do not seem to depend on having private access. This is further discussed later in the report.

Comparing access locations based on gender, males tend to use the Internet more often than do females from home (96% versus 92%) and from the homes of friends and relatives (33% versus 24%).

3.15 Modalities of Reception

CIP investigated the extent to which the Internet is accessed across several devices: wired personal computers (PCs), wireless computers, wireless devices and mobile platforms. As the results in Table 3-3 indicate, Canadians predominantly use a wired PC platform to go online. Two-thirds of those online use hard-wired PCs for access, while one-third rely on some type of wireless computer. Those who use wireless devices are also likely to use multiple devices for accessing the Internet, including wired computers.

Table 3-3 Device used for Internet access across locations

Location Used for Internet Access	Device Used for Internet Access				
	All devices	Wired PC	Wireless PC	Any PC	Mobile device
	%	%	%	%	%
Home	94	90	23	94	9
Work	43	41	5	42	5
School	20	24	4	20	2
Friend/relative	28	13	6	26	5
Public place	16	1	4	15	3
Other location	4	—	1	2	3

CIP 2007 — C2.076(A)BF–083OF (Internet user respondents, 12 years +, n=2374)

Note:

- Demographic comparisons are based on the relative proportion of each variable category to the total Internet user population.

Table 3-4 provides a breakdown of the use of wireless devices across demographic categories. Youth use wireless devices only slightly more than does the adult population (35% versus 32% — not statistically significant). Males tend to use them to access the Internet more than do females (38% versus 26%). There is also a language gap with respect to the use of wireless devices, with 34% of English speakers using them compared to only 23% of French speakers. Regionally, Internet users from Alberta make the most use of wireless devices for accessing the Internet (40%), while of all the age groups, the 18–29-year-old age group most frequently uses them to access the Internet.

Overall, while 85% of Canadians report they personally use a cell phone, only 13% of this group said that they surf the Internet or send e-mails with a mobile device. Similar low levels of mobile access to the Internet are also reported across possible access locations. This analysis found that users who access the Internet via mobile devices do so most often at home, work and the residences of friends and relatives (ranging from 5% to 9% of all Internet users), while the Internet is accessed on mobile devices in public or other locations by only 2–3% of Internet users.

Evidently, Canadians consistently exhibit a propensity to access the Internet from permanent, fixed devices in home or familiar locations. While other modalities and locations for Internet access are increasing for Canadians, by no means do the levels of access come close to the higher penetration rates evidenced elsewhere around the world. This particular delineation of Internet use is an important element in the work of CIP, and will continue to be monitored in future studies.

Table 3-4 Use of wireless devices for Internet access across demographic variables

Demographic and Other Categories	Internet Users: All wireless devices
	%
Overall	**32**
Sample	
Youth (12–17)	35
Adult (18+)	32
	*ns
Language group	
Anglophone	34
Francophone	23
Region	
British Columbia	32
Alberta	40
Prairie provinces	25
Ontario	35
Quebec	23
Atlantic provinces	35
Age	
12–17	35
18–29	40
30–44	37
45–59	29
60+	16
Life stage	
Full-time student	38
Full-time employed	36

Demographic and Other Categories	Internet Users: All wireless devices
	%
Income	
<$40,000	21
$40,000–$59,999	24
$60,000–$79,999	27
$80,000+	45
Community size	
1,000,000+	34
500,000–999,999	38
100,000–499,999	38
5,000–99,999	30
<5,000	22
Occupation	
Professional	42
Administrator/owner of large business	49
Administrator/owner of small business	32
Office worker	29
Tradesman	27
Unskilled worker	44
Farmer/fisherman	18
Homemaker	22
Experience online	
<6 years	21
6–<10 years	29
10–<15 years	38
15 years +	43

Demographic and Other Categories	Internet Users: All wireless devices
	%
Retired	11
Gender	
Male	38
Female	26
Education	
High school graduate or less	28
Attended college/university	30
University degree +	39

Demographic and Other Categories	Internet Users: All wireless devices
	%
Level of engagement	
Light user (<5 hours)	13
Moderate user (5–<15 hours)	22
Heavy user (15 hours +)	50
Broadband access	
Yes	39
No	14

CIP 2007 — C2.075 x demographic variables (Internet user respondents, 12 years +, n=2359)

Notes:
- Demographic comparisons are based on the relative proportion of each variable category to the total Internet user population.
- Differences not statistically significant at the .01 threshold are indicated by *ns.

3.16 Level of Engagement — Time Spent Online

Internet penetration levels provide valuable information about Internet accessibility and who is online, while time spent using the Internet is perhaps the most revealing measure to indicate level of engagement online. CIP 2007 measured time spent on the Internet in an average week across a wide range of modalities, including location and device used. In fact, the study's findings provide perhaps the most comprehensive data related to specific time use measurement of Internet engagement available in Canada. These results indicate where and when Canadians engage online, so it is possible to begin to identify patterns of behaviour across Internet activities and applications.

Be that as it may, it is important to offer a cautionary note about interpretation of time measurement data from survey research. There are several different ways to determine time estimates of Internet use, including telephone or in-person surveys, time diaries and online measuring devices. Results from all three methodologies tend to differ, each skewing findings in a particular manner. Many researchers believe that survey respondents tend to inflate time estimates, diary entries tend to underestimate time spent, and online methodologies are less than reliable measures for pinpointing individual online consumption or activities.

However, what is important in this analysis is that it appears, in relative terms, that respondents are fairly accurate at gauging and reporting time spent using the Internet. In other words, self-reported time measures from survey respondents provide a very good indication of weighting or ranking of engagement across various locations, devices and time spent accessing various online applications and activities.

Two different breakdowns are applied to analyze time spent online. The first considers a sub-sample of all Internet users to gauge overall total time measures as well as proportion of time spent across various locations and devices. In other words, this first method treats all Internet users as valid respondents in its base calculation. Results include Internet users who reported

time spent as well as Internet users who reported no time spent in a specific location. As all Internet users are included in the calculation, the sum of time across all locations equals the total overall time online. In this breakdown, when time measures for a location or device are presented, they also represent the average for all Internet users, including those whose time spent at a particular location or with a specific device is zero.

The second breakdown considers time spent online for only those respondents who access the Internet from a specific location or device. This measure does not include those who did not respond or who reported zero in response to Internet usage at a specific location and with a specific device. This method provides a relative measure of time spent online for only those who use the Internet at a specific location or with a specific device, as opposed to the overall rate of all Internet users.

3.17 Time Spent Online — Sub-sample of all Internet Respondents

The overall average time spent online for all Internet users regardless of age or other demographic categorization is 17 hours per week. Table 3-5 provides a comprehensive breakdown of average time per week spent online as well as proportional and relative weighted measures across various locations and devices. Once again, this table provides results from the sample of all Internet users, so the findings reflect overall totals across devices and relative or proportionate time spent across locations and devices.

Table 3-5 Time spent online across access locations by all Internet users

Location Used for Internet Access	Device Used for Internet Access					
	Wired PC	Wireless PC	Any PC	Mobile device	All devices	% of Total
	hours/wk	hours/wk	hours/wk	hours/wk	hours/wk	%
Home	8.4	1.6	10.0	.20	10.2	60
Work	4.8	.28	5.1	.11	5.2	30
School	.64	.11	.75	.02	.78	5
Friend/relative	.38	.07	.46	.06	.52	3
Public place	.22	.04	.26	.02	.28	2
Other location	.01	.01	.01	.06	.07	<1
Total — All locations	**14.4**	**2.2**	**16.7**	**.46**	**17.0**	**100%**

CIP 2007 — C2.083 (Internet user respondents, 12 years +, n=2200)

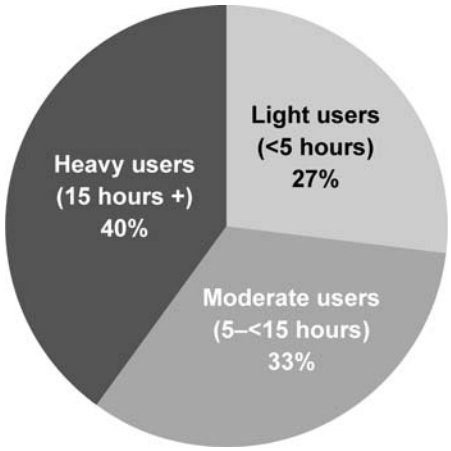
Notes:
- The calculation of means is based on average hours of Internet usage across locations and devices, including responses of 0.
- A listwise deletion procedure was applied.

Considering the amount of time users spend online, more people fall into the heavy users group (those who are online for 15 or more hours per week) than into any other group. As Figure 3-7 indicates, this group comprises 40% of all Internet users. On average, heavy users spend 33.6 hours per week online.

Profile of heavy Internet users:

- Typically live in Alberta (45%) and Ontario (43%)
- Mostly younger Internet users (52% of 18–29-year-old category)
- Predominantly students (46%)
- From the higher income quartile and level of education
- More experienced Internet users (52% of those online 15 years or more)

Figure 3-7 Internet users across time–use categories



CIP 2007 — C2.083Te (Internet user respondents, 12 years +, n=2200)

Among all locations, home is the most predominant location of Internet access; here Canadians are online an average of 10.2 hours per week, representing 60% of overall Internet consumption. Average time spent online at work is 5.2 hours per week or 30% of the total time spent online, while just over 1.5 hours per week, or the remaining 10%, is spent online at a combination of school, homes of friends and relatives, public places and other locations.

As previously discussed, Internet users access the Internet more often from a wired PC than from any other device. Overall, 14.4 hours per week, or 85% of the average time spent online, is from a wired PC — once again, predominantly from home. The Canadian Internet diet consists of very little use of wireless and mobile devices compared to overall online consumption. Internet users access the Internet for less than one-half hour per week from mobile devices including cell phones.

Table 3-6 provides a breakdown of time spent online at all locations compared to at home, across demographic categories. Time measures reported for home use include Internet home users only as the sample base.

Table 3-6 Time spent online at all locations and at home across demographic variables

Demographic and Other Categories	Time Spent Using the Internet	
	All locations	Home
	hours/week	hours/week
Total	**17.0**	**10.8**
Sample		
Youth (12–17)	16.3	11.3
Adult (18+)	17.1	10.7
	**ns*	**ns*
Language group		
Anglophone	17.7	11.2
Francophone	14.0	8.8
Region		
British Columbia	17.4	11.6
Alberta	19.5	11.9
Prairie provinces	14.2	9.9
Ontario	18.2	11.3
Quebec	13.9	8.8
Atlantic provinces	17.1	10.7
Age		
12–17	16.3	11.3
18–29	21.6	13.9
30–44	18.1	10.1
45–59	16.2	9.9
60+	10.9	9.2
Life stage		
Full-time student	19.3	13.4
Full-time employed	19.0	10.0
Retired	9.3	9.3

Demographic and Other Categories	Time Spent Using the Internet	
	All locations	Home
	hours/week	hours/week
Gender		
Male	18.8	11.8
Female	15.3	9.7
Education		
High school graduate or less	14.7	10.9
Attended college/university	16.7	10.6
University degree +	19.7	11.0
Income		
<$40,000	15.3	11.7
$40,000–$59,999	15.8	10.5
$60,000–$79,999	16.0	9.8
$80,000+	19.9	11.2
		*ns
Community size		
1,000,000+	19.0	11.7
500,000–999,999	20.6	12.6
100,000–499,999	16.9	10.5
5,000–99,999	16.1	10.4
<5,000	12.4	8.3
Marital status		
Single	20.4	12.9
Married	15.4	9.6
Living with a partner	15.6	9.6
Separated	18.4	10.4
Divorced	14.7	9.7
Widowed	10.3	7.5

Demographic and Other Categories	Time Spent Using the Internet	
	All locations	Home
	hours/week	hours/week
Occupation		
Professional	20.6	10.4
Administrator/owner of large business	22.1	12.4
Administrator/owner of small business	18.9	10.3
Office worker	20.3	10.6
Tradesman	14.8	11.2
Unskilled worker	15.6	13.0
Farmer/fisherman	5.4	4.8
Homemaker	8.7	8.9
		*ns
Experience online		
<6 years	10.4	7.9
6–<10 years	16.6	10.8
10–<15 years	19.4	11.7
15 years +	24.0	13.7
Level of engagement		
Light user (<5 hours)	2.1	1.6
Moderate user (5–<15 hours)	9.0	6.5
Heavy user (15 hours +)	33.6	20.7
Broadband access		
Yes	20.5	12.5
No	10.7	6.5
Wireless device		
Yes	26.8	15.4
No	12.6	10.8

CIP 2007 — C2.083HS, 083TT (Internet user respondents, 12 years +, n=2200)

Notes:
- The calculation of means for “All locations" is based on average hours of Internet usage across locations and devices, including responses of 0. A listwise deletion procedure was applied.
- Differences not statistically significant at the .01 threshold are indicated by *ns.
- The calculation of means for "Home" is based on a sub-sample of home Internet users only, excluding responses of 0.

With respect to total time spent online, there are regional and language differences. Anglophones are online 17.7 hours in an average week compared to Francophones who spend an average of 14.0 hours per week. Time spent online in an average week in Quebec is 13.9 hours versus 17.8 hours for the rest of Canada. A regional breakdown of time spent online weekly illustrates considerable diversity; Alberta (19.5 hours), Ontario (18.2 hours), British Columbia (17.4 hours) and the Atlantic Provinces (17.1 hours) represent regions where Internet users are more engaged, while the Prairie provinces and Quebec have Internet users who are less engaged (14.2 and 13.9 hours per week respectively.)

A gender gap exists when analysing time spent online. Males tend to be significantly more engaged than are females — 18.8 versus 15.3 online hours per week respectively. The relationship between income, education and time online shows a curve similar to penetration rates; the wealthier and more educated an individual, the greater amount of time she/he spends online.

Finally, those who use a broadband connection spend twice as much time online as do those who do not use such a connection (20.5 hours versus 10.7 hours per week.) Additionally, when looking at those who use any type of wireless device as part of their Internet diet versus those who never use a wireless device, the results are even more remarkable. The overall time spent online in an average week for those who use any type of wireless device is 26.8 hours, versus 12.6 hours for those who do not use any type of wireless device to access the Internet.

Evidently, the ubiquitous and always-on characteristic of broadband and wireless access has a major impact on overall time spent online. As will be discussed later in this report, greater time spent using the Internet per week dramatically changes the activities and applications used by Internet users.

3.18 Time Online — Sub-sample of Internet Users at Specific Locations

Our time measure analysis also looks at the sub-sample of those accessing the Internet from each specific location. For this analysis, within each subgroup, those Internet users who did not use the Internet or who responded zero at a location or device were excluded from the calculation of average time spent online across each access point and platform. This provides a more accurate estimation of time spent online for each particular subgroup, based upon location and device used. The findings presented in Table 3-7 provide a comprehensive assessment of time spent online for the specific subset of users who access the Internet at that location and with a specific device.

Based on location of access, those who use the Internet at work spend the greatest amount of time online — an average of 11.9 hours per week across all devices. Not surprising, home users also have a very high level of engagement at 10.8 hours in an average week. The time measure data corroborate these findings when penetration rates are evaluated; even considering only those Internet users who go online in more public places, the level of engagement is much lower than when access takes place in more private and familiar locations. The devices that show the lowest level of Internet engagement are mobile devices such as a cell phones or PDAs (4.1 hours per week across all locations). This usage, across all locations, is predicted to grow considerably as the adoption of Internet mobile devices continues to increase.

The subgroup of Internet users who access the Internet from home exhibits the most significant differences across demographic sectors. The language divide continues to exist for time spent online. English-speaking Internet users are online 11.2 hours per week from home compared to only 8.8 hours for French-speaking Canadians. This diversity is similar with respect to regional comparisons (Quebecers are online 8.8 hours in an average week versus 11.8 hours for the rest of Canada).

Table 3-7 Time spent online by specific users at individual access locations

Location Used for Internet Access	n	Device Used for Internet Access				
		Wired PC	Wireless PC	Any PC	Mobile device	All devices
		hours/wk	hours/wk	hours/wk	hours/wk	hours/wk
n		*2221*	*580*	*2218*	*265*	*2200*
Home	*2200*	9.2	7.2	10.6	2.4	10.8
Work	*1012*	11.5	5.7	11.9	2.4	11.9
School	*465*	3.6	2.8	3.9	1.1	4.0
Friend/relative	*665*	1.9	1.2	2.0	1.2	2.1
Public place	*381*	2.4	1.1	2.4	.89	2.3
Other location	*100*	.32	.92	.68	1.8	1.5
Total — All locations	***2200***	**14.6**	**8.6**	**16.6**	**4.1**	**17.1**

CIP 2007 — C2.083 (Sub-sample of Internet user respondents at specific locations, 12 years +)

Note:
- The calculation of means is based on average hours of Internet usage for users at specific locations and devices, not including responses of 0.

Broadband users spend double the amount of time online at home as those without broadband — 12.5 hours versus 6.5 hours respectively. The gender gap is also most pronounced at home where males spend 11.8 hours per week online compared to females at 9.7 hours per week. Finally, age shows significant differences for time spent online from home, with younger Internet users — those aged 12–29 — using the Internet the most and therefore, as discussed in a later chapter, engaging in much more diverse activities and applications than do older Internet users.

3.19 Trends: 2004 to 2007

A distinctive characteristic of CIP compared to other research projects is that it is a longitudinal study that measures behaviour and attitudes related to the Internet and emerging technologies over time. It provides an opportunity to investigate trends and patterns in online behaviour. This is perhaps the most revealing element of the CIP investigation — looking at changes that occur over time, and extrapolating how these changes may look in the future. This best serves the CIP constituency, composed of academic, industry and government representation. It is the intention of the project to survey the Canadian population an average of every three years.

A major focus of this report is an examination of changes since the benchmark survey in 2004. The 2007 survey offers a more comprehensive picture of Internet use and deals with important new areas, such as social networking. Still, a core set of questions was carried over from 2004, permitting the examination of trends. The next survey will provide even more data points.

To facilitate comparisons of the 2004 and 2007 data, comparable samples were created, setting aside the youth sub-sample in the 2007 data set, since the 2004 sample did not include respondents under 18 years of age. This is why results from 2007 reported in the trends sections of each chapter may differ slightly from results in other chapters, which usually include

percentages or averages based on proportional weighting of all Canadians aged 12 years and older.

In 2004, 3,014 Canadians aged 18 years and older were surveyed. The full sample from the 2007 study includes responses from a representative sub-sample of 400 youth, aged 12–17 years, and a sub-sample of 2,750 adults, aged 18 years and older. In 2007, the study purposely over-sampled youth to ensure a robust sub-sample from which to independently investigate patterns of media behaviour of younger Canadians. The combined sample size for this 2007 study, correctly weighted to Canadian census information, represents 3,037 Canadians. Most analysis in this report is based on the entire sample.

Table 3-8 provides a comprehensive breakdown of the results from 2004 to 2007 across several key penetration, engagement and demographic categories.

Table 3-8 Internet use across demographic variables: 2004 to 2007

Demographic and Other Categories	Percentage of Internet Users		
	2004	2007	+ / -
	%	%	
Current Internet user (past three months)	**72**	**76**	**+4.0**
Internet user in past year	**75**	**81**	**+5.0**
Language group			
Anglophone	74	80	+6.0
Francophone	66	64	-2.0
Region			
British Columbia	74	82	+8.0
Alberta	76	83	+7.0
Prairie provinces	69	81	+12.0
Ontario	75	81	+6.0
Quebec	68	64	-4.0
Atlantic provinces	67	69	+2.0
Age			
18–24	90	94	+4.0
25–34	86	89	+3.0
35–44	85	86	+1.0
45–55	76	81	+5.0

Demographic and Other Categories	Percentage of Internet Users		
	2004	2007	+ / -
	%	%	
55–64	63	67	+4.0
65+	31	45	+14.0
Life stage			
Full-time student	95	92	-3.0
Full-time employed	84	87	+3.0
Retired	41	47	+6.0
Gender			
Male	75	78	+3.0
Female	69	74	+5.0
Education			
High school graduate or less	48	56	+8.0
Attended college/university	78	80	+2.0
University degree +	89	90	+1.0
Income			
<$40,000	57	58	+1.0
$40,000–$59,999	74	75	+1.0
$60,000–$79,999	86	85	-1.0
$80,000+	91	92	+1.0
Community size			
1,000,000+	77	82	+5.0
100,000–999,999	75	80	+5.0
5,000–99,999	67	74	+7.0
<5,000	60	66	+6.0
Marital status			
Single	83	83	0.0
Married	73	80	+7.0

Demographic and Other Categories	Percentage of Internet Users		
	2004	2007	+ / -
	%	%	
Living with a partner	80	81	+1.0
Separated	66	68	+2.0
Divorced	62	63	+1.0
Widowed	28	34	+6.0
Occupation			
Professional	90	91	+1.0
Administrator/owner of large business	93	96	+3.0
Administrator/owner of small business	81	91	+10.0
Office worker	89	89	—
Tradesman	69	75	+6.0
Unskilled worker	46	66	+20.0
Farmer/fisherman	55	64	+9.0
Homemaker	57	62	+5.0
Experience online			
<6 years	58	21	-37.0
6–<10 years	27	25	-2.0
10–<15 years	15	39	+24.0
15 years +	—	14	—
Level of engagement			
Light user (<5 hours)	33	28	-5.0
Moderate user (5–<15 hours)	35	32	-3.0
Heavy user (15 hours +)	33	41	+8.0
Broadband access			
Yes	71	80	+9.0
No	29	20	-9.0

CIP 2004 — C1.042 x demographic variables (n=2168);
CIP 2007 — C2.071 x demographic variables (All respondents, 18 years +, n=2098)

Notes:
- Demographic comparisons are based on the relative proportion of each variable category to the total Internet user population.
- Other comparisons are based upon the distribution within variable categories.
- In these comparisons, some totals may not add to 100% due to rounding.

3.19.1 Overall Internet Usage

From 2004 to 2007, Internet penetration for Canadians 18 years and older increased from 72% to 76%. This finding reflects the number of current Internet users, as defined in the questionnaire, who accessed the Internet in the previous three months. When those who accessed the Internet in the past year at the time of each study are included, a similar increase in penetration levels is seen, from 75% in 2004 to 81% in 2007. When asked if they had ever used the Internet, the vast majority of adult Canadians reported having been online at one time or another: 88% as of 2007 and 82% as of 2004. All indicators demonstrate an overall growth of Internet penetration in Canada of between 4% and 5% from 2004 to 2007.

3.19.2 Demographic Comparisons

While overall Internet penetration levels have improved across Canada, language and regional disparities have increased since 2004. The gap in Internet adoption between Anglophone and Francophone Canadians has widened from 8% in 2004 to 16% in 2007.

The Prairie provinces have experienced the most dramatic growth, with penetration levels increasing from 69% in 2004 to 81% in 2007. Except in Atlantic Canada and Quebec, more than four in five Canadians are online — an increase of 6–12% in the various provinces since 2004. Whereas in 2004 there were no discernible differences in Internet penetration across the six regions analysed in the study, in 2007 the variance across regions is now statistically significant. Regional divides are growing in Canada.[3]

The gender gap has decreased over time, from 6% in 2004 to 4% in 2007.

Internet usage across all age groups has increased since 2004. Age remains inversely related to being online, but the age gap has decreased. The penetration rate in 2004 was 59% higher in the 18–24 years age group than in the 65 years and older age group; in 2007, it was 49% higher. Most notable is the increased adoption of the Internet by Canada's eldest members. For those aged 65 years and older, penetration levels have increased from 31% in 2004 to 45% in 2007.

This is corroborated when reviewing the life stage scale. Internet access by retired Canadians has increased from 41% in 2004 to 47% in 2007. In addition, as younger Canadians move through the life stages, it is expected that they will maintain their use of the Internet. Therefore, overall Internet penetration levels — now around 76% for adults — can be expected to continue to grow.

In 2007, income and education were inversely related to Internet usage, just as they were in 2004. The more wealthy and educated an individual is, the more likely she/he is to use the Internet. The gap across income and education groups in Canada continues to be substantial. Still, there has been a considerable increase in Internet penetration among the lowest education demographic, from 48% in 2004 to 56% in 2007.

The highest levels of Internet penetration continue to be in the more populated regions across Canada — those towns and cities with more than 100,000 inhabitants. However, it is noteworthy that communities with fewer than 100,000 inhabitants were found to have the greatest increase in penetration levels — growing from 60–67% in 2004 to 66–74% in 2007. While Internet adoption continues to be strongest in larger towns and cities, it is significant that the greatest growth is occurring in regions that have more challenging issues with respect to technology deployment.

[3] As reported earlier, the Francophone population in Quebec was intentionally over-sampled in this study, thereby slightly under-representing Anglophones residing in Quebec. Anglophones from Quebec tend to be engaged with the Internet more than are Francophones from Quebec. However, corrective weighting would not result in material differences in results reported for the province of Quebec.

Since 2004, the most substantial increase in Internet usage across all employment categories has occurred among tradespeople or blue collar workers, unskilled workers, farmers and fishermen. This finding, when considered in conjunction with the substantial increases in Canadian Internet usage by those in the lowest education category and the most elderly, seems to indicate that longstanding divides are diminishing, as the highest levels of growth are occurring in long-established marginalized demographic categories.

3.19.3 Level of Engagement — Time Spent Online

Tables 3-9 and 3-10 present a comprehensive overview of time spent online, comparing findings from 2004 and 2007 across several locations. Once again, for this analysis, the 2007 sample has been adjusted to include only those 18 years and older in order to correspond with data collected in 2004. In addition, time measures are reported as, a) an overall aggregate total for the sub-sample of all Internet users, which includes an analysis of the proportional time spent across several locations for Internet access, and b) specific time measures of only those Internet users who reported spending time online at specific locations.

Table 3-9 Time spent online across access locations by all Internet users: 2004 to 2007

Location Used For Internet Access	Time Spent Using the Internet			
	2004		2007	
	hours/week	% of total time	hours/week	% of total time
Home	7.2	55	10.0	58
Work	4.9	37	5.8	34
School	.59	4	.56	3
Friend/relative	.28	2	.38	2
Public place	.20	1	.25	1
Other location	.08	1	.07	-1

CIP 2004 — C1.046–052 (n=2168); CIP 2007 — C2.083 (Internet user respondents, 18 years +, n=2098)

Notes:
- The calculation of means is based on average hours of Internet usage across locations and devices, including responses of 0.
- A listwise deletion procedure was applied.

As Table 3-9 indicates, overall time spent online increased nearly four hours in an average week from 2004 to 2007 (13.2 to 17.1 hours per week.) The greatest increase in time spent online occurred in the home environment, where Canadians now spend 58% of their total time online (an increase of 3% or three hours per week from 2004). Noteworthy is the lack of any increase in proportional time spent online in public places. Finally, as much as technology has provided more potential for wireless and mobile communication, this study found that the amount of time spent online from these devices in Canada has not dramatically increased over the past three years.

When considering specific locations where the Internet is accessed, the most striking increase has occurred in the home environment: 93% of Internet users (18 years and older) now spend an average of 10.7 hours per week online at home compared to 85% spending 8.4 hours online at home in 2004. While the frequency of access to the Internet in public places has remained constant, the level of engagement or time spent online has increased, from 1.6 hours per week in 2004 to 2.6 hours per week in 2007. The findings also indicate there has been a 5% increase in

consumption at residences of friends or relatives. All remaining location indices have remained fairly constant.

Table 3-10 Proportion of users and time spent online across access locations: 2004 to 2007

Location Used For Internet Access	Percentage of Internet Users			Time Spent Using the Internet		
	2004	2007	+/-	2004	2007	+ / -
	%	%		hours/wk	hours/wk	
Home	85	93	+8	8.4	10.7	+2.4
Work	48	49	+1	9.9	11.9	+2.0
School	12	12	—	4.7	4.8	+.01
Friend/relative	17	22	+5	1.6	1.8	+.02
Public place	12	13	+1	1.6	2.6	+1.0
Other location	5	5	—	1.7	1.6	-.01

CIP 2004 — C1.046–052 (n=2168); CIP 2007 — C2.083 (Internet user respondents, 18 years +, n=2098)

Note:
- The calculation of means is based on average hours of Internet usage for users at specific locations and devices, not including responses of 0.

3.19.4 Level of Engagement — Time Spent Online across Demographic Categories

Table 3-11 provides a breakdown of time spent online across demographic categories for 2004 versus 2007. Differences in adoption levels across language and regional categories remain consistent when considering overall time spent online by Internet users. While time spent online by Francophones has increased from 10.7 hours per week in 2004 to 13.7 hours per week in 2007, it is still more than four hours fewer than that spent by Anglophones. This divide is borne out when comparing average time spent online across regions in Canada: Albertans, British Columbians and Ontarians continue, on average, to spend the most time online while Quebecers spend the least. It is noteworthy that in all provinces time spent online has increased since 2004.

Males continue to spend more time online than do females. The gap has increased from two hours in 2004 to just over three hours in 2007.

Young Canadians demonstrate the most increased growth in time online from 2004. Time spent on the Internet for both the 18–24- and 25–34-year-old categories has grown by approximately six hours per week. As in 2004, the older the individual, the less time she/he is likely to spend on the Internet.

Table 3-11 Time spent online across demographic variables for all Internet users: 2004 to 2007

Demographic and Other Categories	Time Spent Using the Internet		
	2004	2007	+ / -
	hours/week	hours/week	
Overall	**13.2**	**17.1**	**+3.9**
Language group			
Anglophone	13.9	17.9	+4.0
Francophone	10.7	13.7	+3.0
Region			
British Columbia	13.2	17.9	+4.7
Alberta	13.6	19.9	+6.3
Prairie provinces	11.4	14.4	+3.0
Ontario	14.3	18.2	+3.9
Quebec	11.5	13.7	+2.2
Atlantic provinces	13.5	16.5	+3.0
Age			
18–24	16.8	23.6	+6.8
25–34	13.8	19.8	+6.0
35–44	13.8	17.1	+3.3
45–55	12.8	16.7	+3.9
55–64	9.2	14.2	+5.0
65+	9.0	9.4	+0.4
Life stage			
Full-time student	18.6	23.1	+4.5
Full-time employed	13.8	19.0	+5.2
Retired	8.7	9.3	+0.6
Gender			
Male	14.3	19.0	+4.7
Female	12.0	15.2	+3.2

Demographic and Other Categories	Time Spent Using the Internet		
	2004	2007	+ / -
	hours/week	hours/week	
Education			
High school graduate or less	11.7	13.7	+2.0
Attended college/university	13.1	16.7	+3.6
University degree +	14.0	19.7	+5.7
	**ns*		
Income			
<$40,000	13.4	15.4	+2.0
$40,000–$59,999	12.6	16.1	+3.5
$60,000–$79,999	12.0	15.9	+3.9
$80,000+	14.5	19.9	+5.4
Community size			
1,000,000+	14.2	19.2	+5.0
100,000–999,999	14.4	18.7	+4.3
5,000–99,999	11.5	15.7	+4.2
<5,000	8.9	12.1	+3.2
Marital status			
Single	15.3	21.5	+6.2
Married	12.1	14.4	+2.3
Living with a partner	11.9	15.6	+3.7
Separated	12.6	18.4	+5.8
Divorced	12.8	14.7	+1.9
Widowed	12.4	10.3	-2.1
Occupation			
Professional	14.7	20.6	+5.9
Administrator/owner of large business	14.8	22.1	+7.3
Administrator/owner of small business	16.6	18.9	+2.3
Office worker	14.8	20.3	+5.5
Tradesman	10.3	14.8	+4.5

Demographic and Other Categories	Time Spent Using the Internet		
	2004	2007	+ / -
	hours/week	hours/week	
Unskilled worker	12.3	15.6	+3.3
Farmer/fisherman	6.5	5.4	-1.1
Homemaker	4.9	8.7	+3.8
Experience online			
<6 years	10.5	8.9	-1.6
6–<10 years	15.6	16.4	+0.8
10–<15 years	18.9	19.6	+0.7
15 years +	—	24.0	—
Level of engagement			
Light user (<5 hours)	2.2	2.1	-0.1
Moderate user (5–<15 hours)	8.5	9.0	+0.5
Heavy user (15 hours +)	29.2	33.7	+4.5
Broadband access			
Yes	15.7	20.7	+5.0
No	10.9	10.6	-0.3

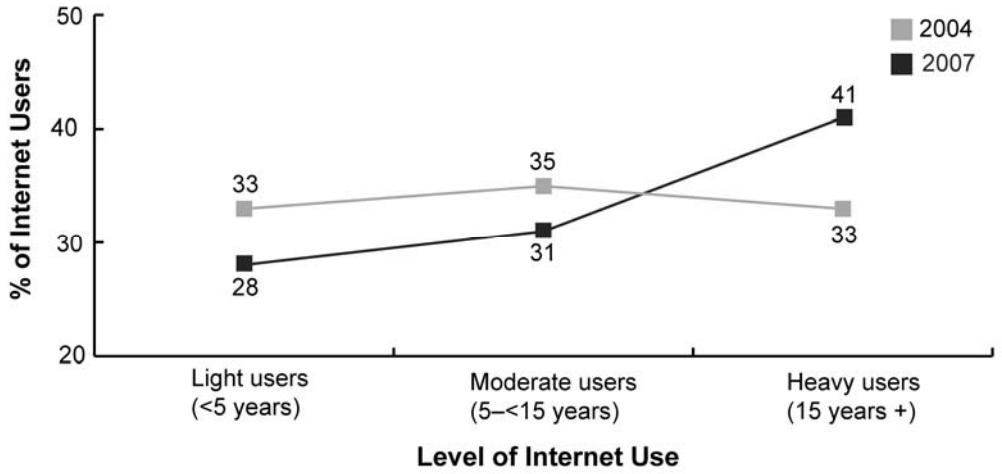
CIP 2004 (n=2168); CIP 2007 (Internet user respondents, 18 years +, n=2098)

Notes:
- The calculation of means is based on average hours of Internet usage across locations and devices, including responses of 0.
- A listwise deletion procedure was applied.
- Differences not statistically significant at the .01 threshold are indicated by **ns.*

Time spent online across income and education categories continues to demonstrate a positive relationship — the higher a person's income and level of education, the more time she/he spends online. In fact, when all locations are considered, education and income divides have grown since 2004. It is interesting to note that for time spent on the Internet only at home, these differences across income categories cease to exist. While there were broad and statistically significant differences in home use of the Internet in 2004, these have all but disappeared in 2007. In addition, those in the lowest income quartile exhibit the largest increase in home Internet usage compared to all other income categories.

Perhaps the most dramatic increase in time spent online is for those categorized as heavy Internet users — those who spend 15 hours or more online in an average week. As Figure 3-8 reveals, in 2004, this group represented 33% of the overall Internet population and spent an average of 29 hours per week online. By 2007, the proportion of heavy Internet users had increased to 41% of all those online and average time online had increased to 34 hours per week.

Figure 3-8 Internet users across time–use categories: 2004 to 2007



CIP 2004 — C1.052e (n=2098); CIP 2007 — C2.083Te (Internet user respondents, 18 years +, n=1964)

As shown in Table 3-11, level of engagement parallels level of adoption across divisions of community size and occupation. In most cases, there have been positive incremental increases in time spent online since 2004.

3.20 Conclusions

Canadians continue to be among the world's heaviest Internet users. Nearly nine in ten Canadians have been online at some time and nearly four in five are current users. Penetration rates are high and increasing, particularly among traditionally marginalized social groups — those with lower levels of income and education, residents of smaller communities, retirees and those over 60 years of age. Internet use among teens and adults under 30 years of age is almost universal.

Despite such high penetration, digital divides persist. The proportion of current Internet users — defined as being online in the previous three months — is much lower in Quebec and among Francophones than in the rest of Canada and among Anglophones. However, the gap between English- and French-speaking Canadians is much smaller for those who have been online in the previous year. The study concludes that there is a larger group of intermittent and occasional users in Francophone Quebec than elsewhere in Canada. English continues to be the predominant language used online, which may be a factor in this pattern of use.

Digital divides persist across gender (now barely significant), age, education, income and community size, among other socio-demographic categories. In general, these gaps have diminished since CIP's benchmark survey in 2004. However, regional differences have grown slightly, reflecting among other factors different rates of broadband expansion.

In contrast to residents of a number of other countries, Canadians tend to use the Internet from home more than from public locations. However, young Canadians are increasingly going online from a variety of locations using wireless differences, mostly laptop PCs. While it is expected that the use of wireless devices will grow, indications are that Canadians will continue to connect primarily from PCs for the foreseeable future.

Canadian Internet users average about 17 hours per week online, with younger users spending more time online than do older users. The percentage of heavy users — those who spend 15 or more hours per week online — has grown from 33% in 2004 to about 41% in 2007. The proportion of Canadians accessing the Internet from home and the time they spend online have both increased significantly since 2004. Increased broadband deployment and adoption appears to be a significant factor here. Canadians with broadband access spend about twice as many hours online in a typical week as do those who rely on dial-up connections.

While penetration levels in most of Canada may be reaching saturation, there is every indication that participation rates will continue to grow in less active regions and socio-demographic groups, and that time spent online will continue to increase in all regions and groups. Wireless online use shows a strong growth trend, primarily as a supplement to wired connectivity.

4 Profile of Internet Non-users: Casual Engagers to Hard Core Non-users

4.1 Key Findings

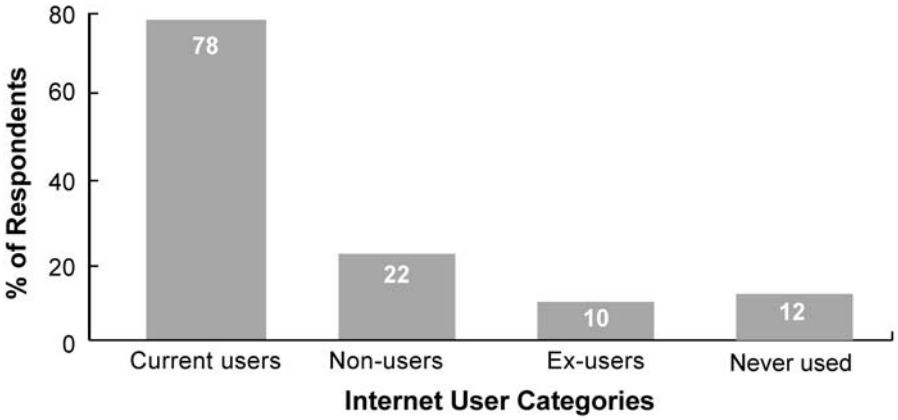
- Of all Canadians, 12% have never used the Internet
- Internet ex-users (those who used the Internet in the past but do not currently use it) represent 10% of the population, or nearly half of all non-users[4]
- The entire population of those aged 12–29 have used the Internet on some occasion; only 4% of 12–17-year-olds were non-users at the time the survey was conducted
- Two in five non-users (41%) plans to use the Internet in the future; most of these intend to be online within six months
- The demographic profile of Internet non-users includes the following:
    - Collectively, more Anglophones than Francophones
    - More residents from Quebec and Ontario than from other provinces
    - Mostly older and retired citizens
    - Primarily individuals with lower levels of education and income
    - More females than males
    - Largely residents of smaller than larger communities
- The most commonly mentioned reasons for not using the Internet are lack of interest and a sense that the Internet is not useful, not having a computer or access to an Internet connection, confusion about technology or technological encumbrances, and being too busy to engage with the online world
- Affordability was not commonly cited as a reason for not using the Internet — only 9% of all non-users claimed cost was why they were not connected
- Four distinct categories of Internet non-users were identified, each with different demographic attributes, behaviours and attitudes:
    - Casual engagers (30% of all non-users): current non-users who used the Internet in the past and plan to be online again in the future
    - Departed users (16%): those who used the Internet in the past but do not plan to do so in the future
    - Expected converts (11%): those who have never used the Internet but likely will in the future
    - Hard core non-users (43%): those who have never used the Internet and have declared they will not in the future
- Casual engagers (6% of all Canadians) are current non-users who continue to use the Internet intermittently
- Departed users and hard core non-users exhibit the least comfort with technology compared to all Canadians; this is a principal reason for their non-engagement online
- Hard core non-users display the highest level of engagement with and reliance on conventional media, such as television, radio, newspapers and books
- The percentage of non-users has decreased since 2004 due to increased Internet penetration
- Casual engagers (Internet users who go online intermittently) form a larger proportion of the non-user group in 2007 than they did in 2004
- Reasons for not using the Internet reported in 2007 are not significantly different from those given in 2004; cost continues to be a less important reason in comparison to other explanations provided for not using the Internet.

[4] In this study, current users are defined as those who had used the Internet in the three months previous to the time the survey was conducted.

4.2 Internet Non-user Profile

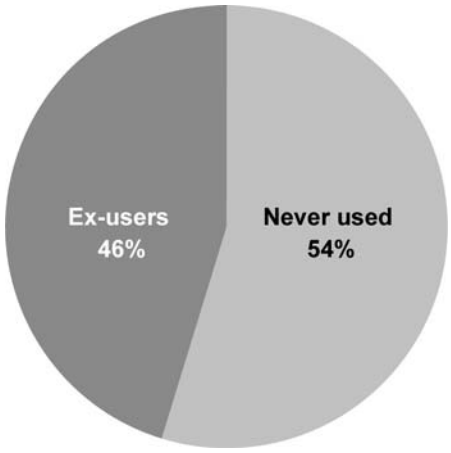
Non-users and intermittent or occasional users pose a communications challenge to governments, social agencies and industry, as well as to media and others that are shifting their focus to the Internet as a channel for delivering their content and services. This is especially true for those agencies that have an obligation to make their services available to all citizens. One of the distinctive features of CIP compared to other studies is the attention it gives to non-users. Figures 4-1 through 4-3 provide more information about those not online.

Figure 4-1 Proportion of Internet users and non-users across the Canadian population



CIP 2007 — C2.071c (All respondents, 12 years +, n=3037)

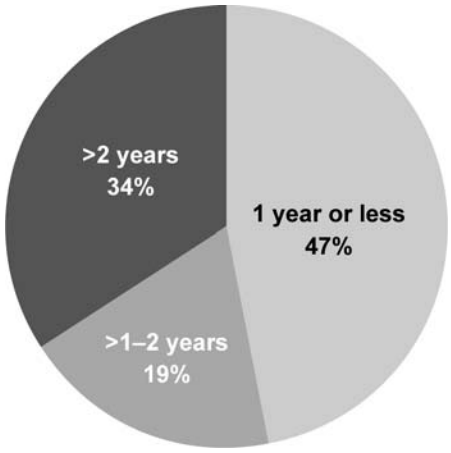
Figure 4-2 Non-users who previously used and never used the Internet



CIP 2007 — C2.230 (Internet non-user respondents, 12 years +, n=660)

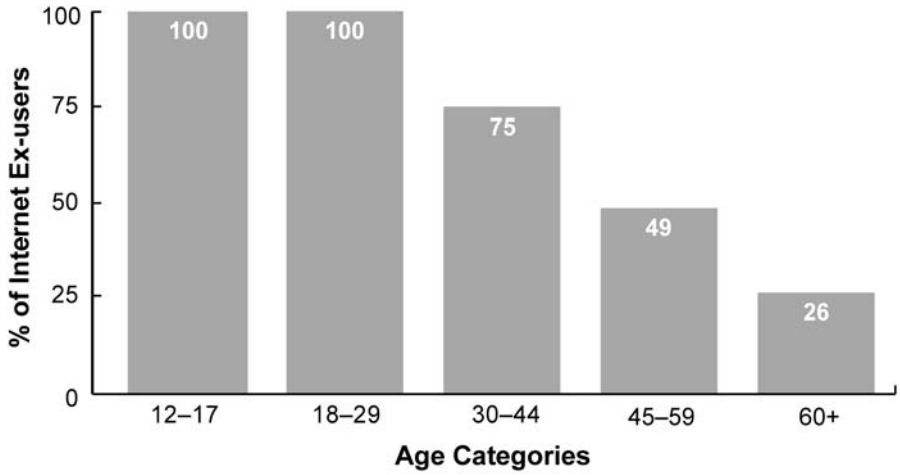
As presented in Chapter 3, 22% of the Canadian population does not currently use the Internet. Of these non-users, 24% are 18 years and older while only 4% are 12–17 years old. Overall, 12% of all Canadians have never used the Internet, while 10% do not currently use it but indicate they previously had. Of all non-users, 46% were online at one time or another. Almost half had used the Internet in the previous year.

Figure 4-3 Length of time since ex-users previously used the Internet



CIP 2007 — C2.232RT (Internet ex-user respondents, 12 years +, n=259)

Figure 4-4 Age breakdown of non-users who previously used the Internet

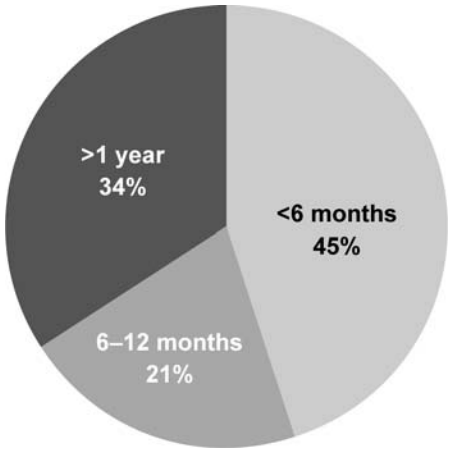


CIP 2007 — C2.230, C2.261a (Internet non-user respondents, 12 years +, n=636)

Of all Internet non-users, 41% declared that they intended to be online in the future. As Figure 4-5 illustrates, two-thirds maintained they would use the Internet within the next year and 45% said they expected to use the Internet again within the next six months. This provides a clear indication that there is a group of occasional or sporadic Internet users.

While Canada possesses one of the highest penetration rates for Internet engagement in the world, it is noteworthy that such a considerable segment of its population — a little more than one-fifth — is currently not online. When considering how pervasive the Internet has become, and consequently how dependent most have become on it for communication, information and entertainment, it is surprising that there continues to be such a significant number not online. Therefore, it is important to look more closely at non-users.

Figure 4-5 When Internet non-users plan to go online

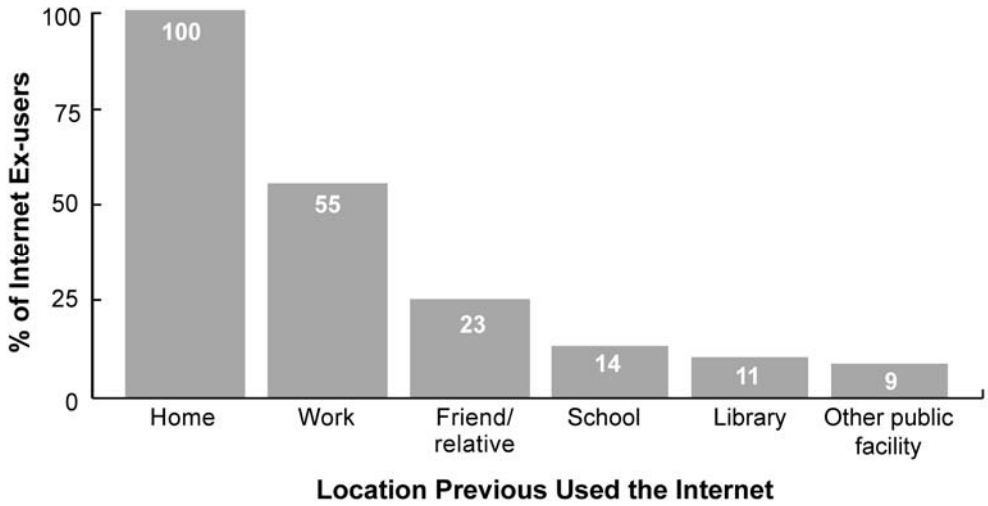


CIP 2007 — C2.235 (Internet non-user respondents who plan to go online, 12 years +, n=224)

Profile of all Internet non-users:[5]

- Predominantly Anglophone (though, proportionally, more Francophones are not online)
- Mostly found in Quebec and Ontario (proportionally, the highest levels of non-users are found in Quebec and Atlantic Canada)
- More typically female than male
- Primarily elder and retired Canadians
- Mainly from the lowest income quartile and having the least amount of formal education
- Chiefly from small communities (under 100,000 inhabitants).

Figure 4-6 Location used by non-users who were previously online



CIP 2007 — C2.233m1–o1 (Internet non-user respondents who previously used the Internet, 12 years +, n=303)

[5] In this profile and others in this chapter, unless specified otherwise, the subgroups identified are those that make up the highest percentage of the non-user group, without regard to their share of the overall population. For example, Anglophones make up the largest proportion of non-users, even though non-users constitute a higher percentage of the Francophone sample. For analytic purposes, in later sections this study also looks at the demographic that constitutes more than their share of non-users.

Overall, a little less than half of all non-users have previously used the Internet, and as Figure 4-6 indicates, mostly at home and at work. Table 4-1 reveals that as a collective group, non-users reported the most important reasons for not being online were lack of interest in or perceived usefulness of the Internet, no computer or lack of access to an Internet connection, confusion about the technology, and being too busy. Surprisingly, and consistent with the study findings from 2004, less than 9% reported they did not use the Internet because it was too expensive. Less than 5% were not online because of concerns of privacy and security or feeling too old.

Table 4-1 Main reasons non-users do not use the Internet

Reason for Not Using the Internet	All Non-users	Internet Ex-users	Never Users
	%	%	%
No interest, not useful	32	30	35
No computer or Internet connection	26	25	27
Technology encumbrance (confused, do not know how to use)	13	11	14
No time or too busy	10	17	5
Cost, too expensive	9	10	8
Privacy or security issue	5	4	5
Age, too old	4	2	6
Other	1	1	-1

CIP 2007 — C2.230, 231T (Internet non-user respondents, 12 years +, n=639)

Note:
- Some totals may not add to 100% due to rounding.

Four in ten non-users intend to use the Internet in the future, and the majority of these anticipate being online within the next year. These non-users clearly have a different relationship with the Internet than do those who have no intention of going online.

4.3 A Taxonomy of Internet Non-users

It is important to further classify Internet non-users to better understand why certain Canadians are not online. As reported, results from the survey indicate that, of all non-users, 46% have used the Internet before. Almost half of this group has used the Internet in the past year. Remarkably, 100% of non-users aged 12–29 years have been online at some point. All non-users who have previously been online are termed “ex-users.” Of all non-users, 56% have never used the Internet before. These individuals are termed “never users.” When asked if they intend to be online in the future, 41% of all non-users responded that they did.

Table 4-2 shows a matrix that classifies Internet non-users into four distinct categories in order to profile and compare each subgroup. The four non-user groups are as follows: casual engagers — those who previously used the Internet and intend to use it in the future; departed users — those who previously used the Internet and do not intend to use it the future; expected converts — those who have never used the Internet but intend to in the future; and the majority of non-users, hard core non-users — those who have never been online and do not intend to use the Internet in

the future. Tables 4-3 and 4-4 provide a breakdown of these four non-user subgroups across selected responses and demographic categories. This is followed by more detailed discussion of each non-user subgroup.

Table 4-2 Taxonomy of Internet non-users

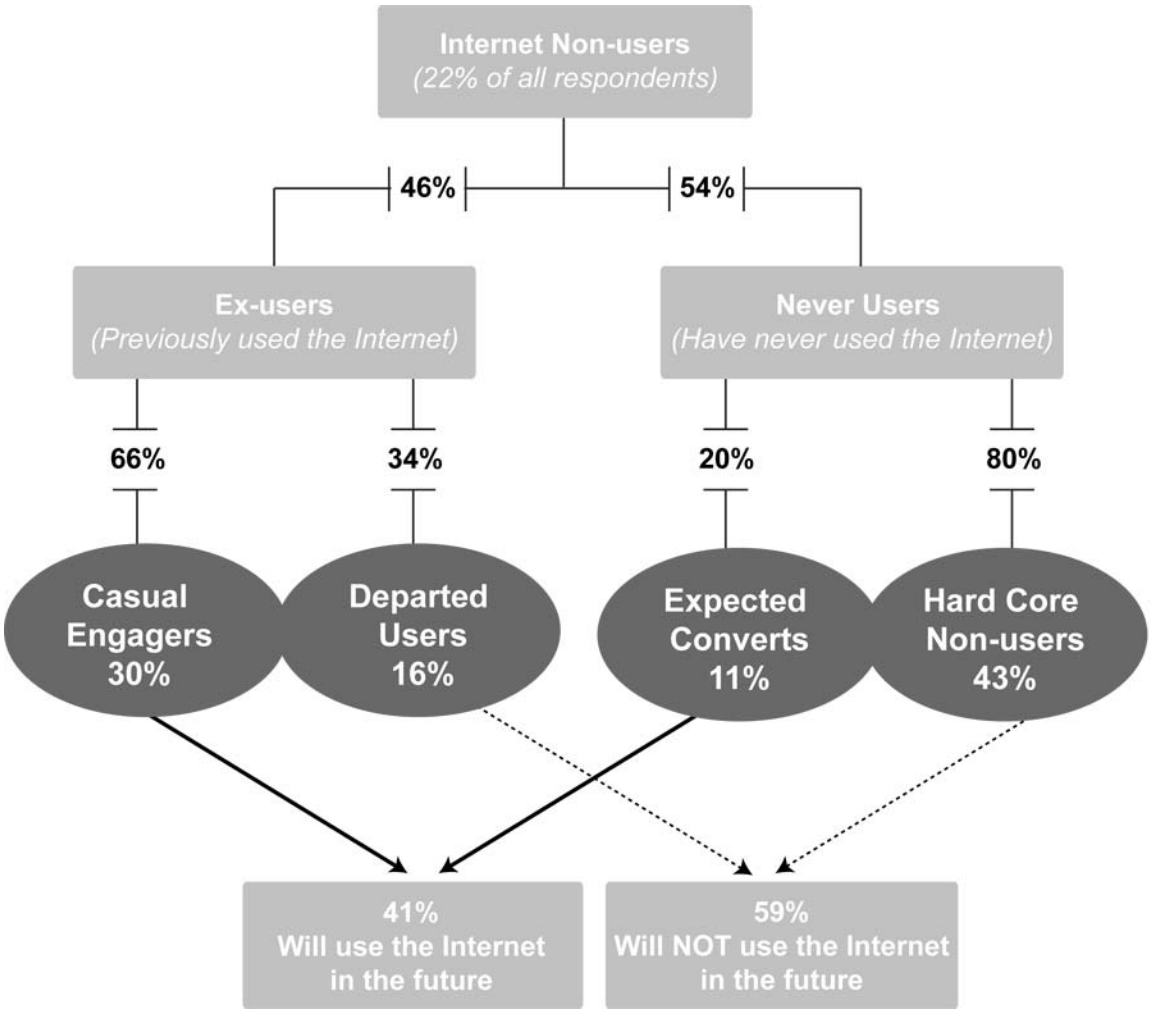


Table 4-3 Non-user subgroups across selected responses

Selected Responses		Internet Ex-users		Never Users	
	All non-users	Casual engagers	Departed users	Expected converts	Hard core non-users
	%	%	%	%	%
n	*663*	*192*	*100*	*71*	*276*
Overall *(C2.234c)*	**100**	**30**	**16**	**11**	**43**
Previously used the Internet *(C2.230)*	46	100	100	—	—
Time since previous use of the Internet *(C2.032b)*					
<1 year	49	55	37	—	—
1 year +	51	45	63	—	—
Location of previous use of the Internet *(C2.233T)*					
Home	55	53	49	—	—
Work	23	14	232	—	—
Friend/Relative	1	12	14	—	—
School	11	7	5	—	—
Library	9	9	3	—	—
Other public facility	8	6	6	—	—
Will use the Internet in the future Yes *(C2.234)*	41	100	0	100	0
When will use the Internet in the future *(C2.235)*					
Next 6 months	45	52	—	27	—
6–12 months	20	18	—	27	—
1 year +	34	30	—	46	—

CIP 2007 — (Internet non-user respondents, 12 years +, n=663)

Note:
- Some totals may not add to 100% due to rounding.

Table 4-4 Non-user subgroups across selected demographic categories

Demographic Variables		Internet Ex-users		Never Users	
	All non-users	Casual engagers	Departed users	Expected converts	Hard core non-users
	%	%	%	%	%
n	*663*	*192*	*100*	*71*	*276*
Language group					
Anglophone	65	61	54	67	71
Francophone	35	39	46	33	29
Region *(*ns)*					
British Columbia	9	7	7	13	11
Alberta	8	8	8	10	7
Prairie Provinces	5	6	2	6	6
Ontario	31	31	23	30	35
Quebec	37	40	48	33	31
Atlantic Provinces	7	7	12	7	10
Age					
12–17	2	6	0	0	0
18–29	8	21	14	0	0
30–44	14	26	16	15	5
45–59	27	25	35	44	21
60+	49	23	35	42	75
Life stage					
Full-time student	5	15	4	2	1
Full-time employed	38	60	46	42	20
Retired	57	26	50	56	79
Gender *(*ns)*					
Male	44	47	46	50	40
Female	56	53	54	50	60

Demographic Variables		Internet Ex-users		Never Users	
	All non-users	Casual engagers	Departed users	Expected converts	Hard core non-users
	%	%	%	%	%
Education					
High school graduate or less	52	40	47	61	60
Attended college/university	35	42	35	30	32
University degree +	13	18	18	9	9
Income *(*ns)*					
<$40,000	53	42	56	51	60
$40,000–$59,999	20	26	17	20	18
$60,000–$79,999	13	15	13	12	12
$80,000+	14	17	15	17	10
Community size *(*ns)*					
1,000,000+	26	24	24	24	27
500,000–999,999	7	7	10	3	7
100,000–499,999	15	11	14	21	17
5,000–99,999	22	22	24	20	22
<5,000	30	35	29	31	27

CIP 2007 — C2.234c x demographic variables (Internet non-user respondents, 12 years +, n=663)

Notes:
- Comparison within each set of variable categories provides profile of each non-user group.
- For each variable, some column totals may not add to 100% due to rounding.
- Differences not statistically significant at the .01 threshold are indicated by *ns.

4.4 Ex-users — Casual Engagers

Of all Internet non-users who are ex-users[6] two-thirds stated they would be back online in the future. Nearly three-quarters intend to re-engage in the next year. Overall, these individuals represent 30% of all non-users and are termed ”casual engagers.” While they are classified as non-users, they do exhibit intermittent use of the Internet — sometimes spending time online and other times not. At the time of the survey, they were classified as Internet non-users.

All ex-users aged 12–17 years declared they would be back online, whereas only three-quarters of all ex-users aged 18–29 confirmed their intention to use the Internet in the future. The majority

[6] In this study, the Internet user sample includes all those who declared they have used the Internet in the past three months at the time of the survey. These individuals are considered “current” Internet users in this analysis. While some classified non-users have used the Internet before, and other non-users may use it in the future, their initial classification is as a non-user at the time the survey was conducted.

of casual engagers intend to be back online in the next year as of the time the survey was conducted, and 55% of this group had been online in the past year.

Casual engagers use the Internet sporadically. In the past, they principally used the Internet from home, work, and the homes of friends and relatives. The most common reasons cited for not being online included not having access to a computer or Internet connection, lack of interest in or perceived usefulness of the Internet, and not having time to engage online.

For casual engagers, Internet use is marginal to their every day lives. It is not as habitual or important an activity as it is for most declared current Internet users.

These findings demonstrate the existence of a substantial cluster of Canadians who, while defined as non-users at the time of the survey, actually use the Internet casually or intermittently and appear comfortable with this level of engagement. For casual engagers, the Internet is not as essential to their lives as are other media. The study questionnaire defined a current Internet user as anyone who had been online in the past three months. Clearly, under a different definition, casual engagers could also be classified as Internet users. They simply use the Internet less regularly and less frequently than do others.

Profile of Internet ex-users who are casual engagers:

- Predominantly Anglophone (61%)
- Mostly inhabitants of Quebec (40%) and Ontario (31%)
- More often female (53%) than male (47%)
- Typically 30 years of age and older (74%)
- Primarily employed (60%), as opposed to retired or students
- Often in the lower income quartile (42%) and possess less than a university degree (82%)
- Principally live in communities with fewer than 5,000 inhabitants (35%)

4.5 Ex-users — Departed Users

Of all non-users 16% have used the Internet at some point in the past but have no intention of going online in the future. This group represents one-third of all previous Internet users (34%). Most of these ex-users have been offline for more than a year (63%). The average time since they last used the Internet is 3.5 years as of the time the survey was conducted.

This behaviour does not constitute intermittent Internet use. In the past, they used the Internet most frequently from home or work and now have made a decision never to return. This subgroup of ex-users is termed ”departed users.”

The primary reason departed users offer for not currently using the Internet is losing interest and not finding the experience useful. Four in ten from this group felt this way. The second most common response was lack of a computer or Internet connection (21%). Cost was not a factor for most (mentioned by only 4%). Clearly, this group did not find being online to be beneficial or enjoyable. Since cost is not a factor, it would be useful to know what applications or services might appeal to them.

Profile of Internet ex-users who are departed users:

- Slightly more likely to be Anglophone than Francophone (54% versus 46%)
- Predominantly Quebec residents (48%)
- More often female than male (54% versus 46%)
- Typically middle-aged and older (70% were 45+ years)
- Often retired (50%)
- Frequently of lower income (56%) and have less than a university degree (82%)
- Evenly spread across various sized communities.

4.6 Never-users — Expected Converts

Expected converts have never used the Internet, but report that they will use it in the future. This group represents 11% of all non-users. Most predict they will be online within the next year (54%). The most important reason for not being online to date is not having a computer or Internet connection. Affordability is not a strong reason for being offline — only 10% mentioned this as a reason for not using the Internet. Access and ability to afford technology appear to be the main drivers that would convert these non-users to Internet users. Accessible, user-friendly Internet connections and applications would likely encourage many in this group to go online.

Profile of Internet never-users who are expected converts:

- Mostly Anglophones (67%)
- Typically residents of Quebec (33%) and Ontario (30%)
- Equally likely to be male as female
- Most often middle-aged and older (86% were 45+ years)
- Often retired (56%)
- Frequently of lower income (51%) and have a high school diploma or less (61%)
- Chiefly live in small-sized communities (5,000 inhabitants or fewer).

4.7 Never-users — Hard Core Non-users

Hard core non-users are those individuals who have never used the Internet and state they never will. At 43% they comprise the largest group of all non-users. They perceive the Internet not to be useful. They express no interest in what they understand is found online. More than one in four do not have access to a computer or Internet connection and 15% are confused by the technology or do not know how to use it. As with other non-user groups, cost does not seem to be a factor in never-users' disengagement. Only 6% feel the Internet is too expensive or they cannot afford the fees.

The principal challenge in encouraging this group to consider Internet engagement — if this is desired — is to find ways to raise interest in Internet activities and applications, as well as to demystify and simplify the technological processes that seem to hinder access. It would appear that cost is not a factor in adoption, consistent with CIP's findings in 2004.

Profile of Internet never-users who are hard core non-users:

- Predominantly Anglophones (71%)
- Typically residents of Ontario (35%) and Quebec (31%)
- More often female than male (60% versus 40%)
- Most often elder citizens — 60 years and older (75%)
- Typically retired individuals (79%)
- Often in the lower income quartile (60%) and have a high school diploma or less (60%)
- Evenly distributed across all community sizes.

4.8 Comparison Across Non-user Classifications

While the study profiles have provided a snapshot of the demographic composition of each non-user group, it is also important to look at key relationships across non-user categories.

4.8.1 Reasons for Not Using the Internet

Table 4-5 provides a breakdown of reasons for not using the Internet across the four non-user subgroups. Departed users and hard core non-users were most likely to mention lack of interest

or lack of perceived usefulness as reasons for not using the Internet. Expected converts were not yet online primarily because they did not have a computer or Internet connection. As previously discussed, cost was not a major factor for non-use in any category, ranging from a low of 6% to a high of 13%.

Table 4-5 Reasons for not using the Internet across four non-user groups

Reasons for Not Using the Internet	Percentage of Internet Non-users			
	Casual engagers	Departed users	Expected converts	Hard core non-users
	%	%	%	%
No interest, not useful	25	42	21	38
Technology encumbrance	11	9	15	15
No computer, Internet connection	26	21	40	25
No time, too busy	17	16	8	4
Cost, cannot afford	13	4	10	6
Privacy, security issue	4	4	3	5
Age, too old	1	2	3	8

CIP 2007 — C2.234c, 231T (Internet non-user respondents, 12 years +, n=614)

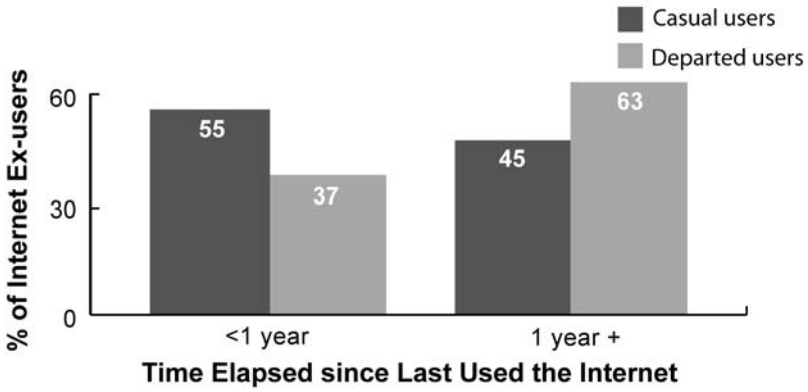
4.8.2 Ex-users — Previous Engagement

Overall, 51% of those who previously used the Internet were online more than a year ago. The overall average time since they used the Internet was 2.6 years previous to when the survey was conducted. However, as Figure 4-7 shows, when comparing those who have declared they will be online in the future with those who claim they will not, 55% of casual engagers versus only 37% of departed users have been online in the past year. This indicates a more sporadic pattern of continuing Internet use for the casual engager than for the departed user. The average time since Internet use was 2.1 years for casual engagers and 3.5 years for departed users. This suggests that while casual engagers could be classified as ongoing intermittent Internet users, departed users have experimented online and concluded that it was neither interesting nor useful. The length of time since departed users last accessed the Internet is indicative of their affirmation to not use the Internet in the future.

4.8.3 Non-users Online in the Future

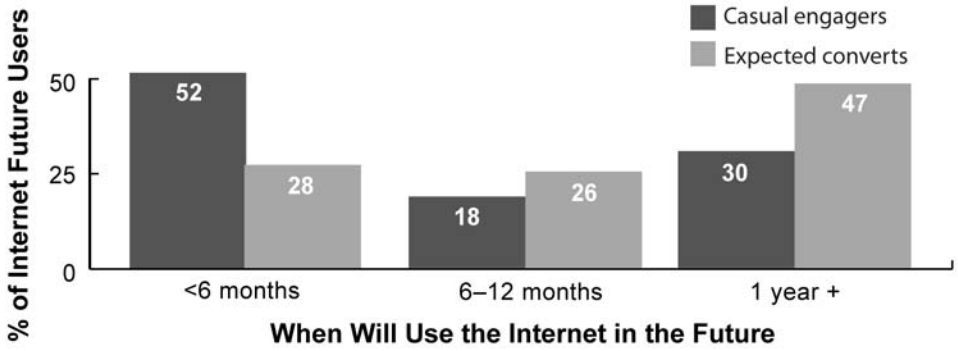
Figure 4-8 provides a breakdown of when in the future non-users (those intending to go online) declare they will use the Internet. Of those non-users who expect to be online in the future, most are casual engagers (73%); far fewer are expected converts (23%). The majority of casual engagers (52%) report they will be online in less than six months (from the time the survey was conducted). This further illustrates the sporadic Internet behaviour of this group. Only 28% of expected converts feel they will use the Internet in less than six months. Most indicate that it will be a year or longer before they will be online (47%).

Figure 4-7 When non-users used the Internet before



CIP 2007 — C2.234c, 235a (Internet non-user respondents who previously used the Internet, 12 years +, n=224)

Figure 4-8 When non-users will use the Internet in the future



CIP 2007 — C2.234c, 232Rb (Internet non-user respondents who will use the Internet in the future, 12 years +, n=247)

4.8.4 Demographic Comparisons

The study examined the total demographic composition of each of the four non-user subgroups. In other words, for each non-user group, the survey asked how many respondents were Anglophones and how many were Francophones. This provided a snapshot of each non-user group's demographic makeup. Here, the analysis considers how selected demographic categories are proportionally distributed across non-user groups. Table 4-6 provides selected demographic variables that demonstrate statistically significant differences across non-user groups.

About half of Francophone non-users are either hard core non-users (36%) or departed users (21%). However, one in three is considered a casual engager (33%) and expects to be online in the future. The proportion of casual engagers tends to be higher in Quebec than in any other Canadian province, though differences across regions are not statistically significant at the .01 level.

As previously mentioned, almost all young Canadians who are not currently online intend to be online in the future (100% of those 12–17 years old, and 75% of those aged 18–29 years.) Most

of those in the 30–44 age bracket are casual engagers. Most hard core non-users are 60 years of age and older. Clearly, this latter group is unlikely to ever engage with the Internet.

Table 4-6 Selected demographic category breakdown across non-user groups

Demographic Variables	Internet Ex-users		Never Users	
	Casual engagers	Departed users	Expected converts	Hard core non-users
	%	%	%	%
n	*192*	*100*	*71*	*276*
Language group				
Anglophone	28	13	11	47
Francophone	33	21	10	36
Age				
12–17	100	0	0	0
18–29	75	25	0	0
30–44	57	18	12	14
45–59	28	21	18	33
60+	14	11	10	65
Life stage				
Full-time student	78	11	4	7
Full-time employed	46	18	11	25
Retired	13	13	10	64
Education				
High school graduate or less	23	14	13	50
Attended college/university	36	16	10	39
University degree +	41	21	8	30

CIP 2007 — C2.234c x demographic variables (Internet non-user respondents, 12 years +, n=663)

Notes:
- Comparison within each set of variable categories provides profile of each non-user group.
- Some row totals may not add to 100% due to rounding.

Most non-users fall within the lowest income quartile, though differences based on income level are not statistically significant. While most declare cost is not a significant factor for being a non-user, many explain they are not online due to lack of access to a computer or Internet connection. Given that most non-users do not own a computer or subscribe to an online service, cost may

indeed be more of a factor for this group than reported. Most non-users also fall into the lowest education category, possessing a high school diploma or less.

Except for casual engagers, a majority of whom are employed (60%), non-users are more likely to be retired than to be students or to be employed.

4.9 Other Patterns for Internet Non-use

To better understand behaviour and attitudes of Internet non-users, this study further investigated several media use and technology related measures. Many of these will be explored in greater depth in later chapters.

4.9.1 Attitudes Towards Technology

The 2007 survey poses several questions related to attitudes towards technology. One key question asks how comfortable individuals feel about technologies in general. As can be seen in Table 4-7, a high percentage of hard core non-users (62%) and departed users (48%) expressed discomfort with technologies. Of all non-user groups, casual engagers demonstrated the highest level of comfort, with one in three responding they felt comfortable with new technology. In comparison, 61% of all Internet users responded they were comfortable with technologies.

Table 4-7 Attitudes towards technology

Attitude Towards Technology		Internet Ex-users		Never Users	
	All non-users	Casual engagers	Departed users	Expected converts	Hard core non-users
	%	%	%	%	%
n	*663*	*192*	*100*	*71*	*276*
Comfort with technology *(C2.238a, 12 years +, n=663)*					
Comfortable	61	31	23	29	13
Neutral	33	34	29	24	25
Not comfortable	16	35	48	47	62
Excited by new technologies *(C2.057, 18 years +, n=652)*					
Totally agree	30	23	12	34	19
Somewhat agree	41	36	31	27	28
Somewhat disagree	19	23	36	24	26
Totally disagree	9	18	21	16	27

CIP 2007 — C2.071, 234c (Internet non-user respondents, 12 years +

Note:
- For each variable, some column totals may not add to 100% due to rounding.

When respondents were asked if they were excited by the possibilities of new technologies, most hard core non-users (53%) and departed users (57%) responded they were mostly not excited by new technologies, whereas casual engagers (59%) were generally most excited of all Internet non-users. This compares with 71% of Internet users who felt excited by new technologies.

These results suggest that overall comfort with technology is a key factor in Internet adoption. The most determined non-users — those who indicate they will not use the Internet in the future, whether or not they used it in the past — are most likely to be technophobic and resistant to changes brought about by technology.

Our findings suggest that affordability is a lesser factor in Internet adoption; it is not nearly as important as comfort with technology. Therefore, the biggest challenge in making the Internet more palatable for non-users (if this is the objective) is to find ways to reduce technophobia (the primary reason non-users do not engage online), to demystify the technology of the Internet, and to make applications more convenient and user friendly.

4.9.2 Other Media Use

To examine further the attitudes and behaviour of non-users, CIP looks at the use of other media by the four non-user groups.

Table 4-8 provides a breakdown of selected measures for traditional media — television, radio, newspapers and books — comparing the four non-user groups to Internet users.

Table 4-8 Non-users' consumption of selected traditional media

Traditional Media		Internet Ex-users		Never Users	
	All non-users	Casual engagers	Departed users	Expected converts	Hard core non-users
n	*2354*	*192*	*100*	*71*	*276*
	%	%	%	%	%
Television (**ns*)	95	94	95	94	95
Radio	87	83	79	83	77
Newspapers (**ns*)	78	75	80	87	76
Books	84	71	71	70	62
	hours/week	hours/week	hours/week	hours/week	hours/week
Television	10.1	13.1	13.3	14.1	15.0
Radio	9.3	11.1	12.5	12.1	13.4
Newspapers	3.2	3.2	4.4	3.5	4.7
Books	6.3	7.2	7.9	4.7	9.0

CIP 2007 — C2.071, 234c (Internet non-user respondents, 18 years +)

Notes:
- The calculation of means is based on the average hours of Internet usage for users at specific locations and devices, not including responses of 0.
- Differences not statistically significant at the .01 threshold are indicated by *ns.

While penetration levels (measured by percentage in each group that use a particular medium) are fairly consistent across the four non-user subgroups, analysis of the level of engagement for time spent using these media reveals some interesting differences.

Hard core non-users spend more time with each of the traditional media than do Internet users. Given the mean age of hard core non-users (an average of 68 years old, versus other non-user subgroup ages of 45–58) it is unlikely that many will be converted to accessing their preferred media online rather than offline.

4.10 Trends: 2004 to 2007

Throughout this report, comparisons have been made over time using only the adult sample (18 years and older) in 2007, since a youth sample was not present in 2004. Table 4-9 provides a comparison of some of the changes since 2004.

Table 4-9 Non-user patterns: 2004 to 2007

Selected Responses	Internet Non-users		
	2004	2007	+ / -
	%	%	
All respondents — *CIP 2004 (18 years +, n=3014), CIP 2007 (18 years +, n=2750)*			
Internet non-users *(C1.042, C2.071)*	28	24	-4
Respondents who have never used and never will use the Internet *(C1.042c, C2.071c)*	19	13	-6
Internet non-users — *CIP 2004 (18 years +, n=844), CIP 2007 (18 years +, n=652)*			
Previously used the Internet *(C1.042c, C2.071c)*	34	45	+11
Will use the Internet in the future *(C1.144, C2.234)*			
All non-users	32	40	+8
Ex-users (previous users)	56	65	+9
Never users	19	21	+2
When will use the Internet in the future *(C1.145, C2.235)*			
Next 6 months	34	44	+10
6–12 months	27	20	-7
1 year +	39	35	-4

CIP 2004 and CIP 2007 (Internet non-user respondents, 18 years +)

Note:
- For each variable, some column totals may not add to 100% due to rounding.

For those 18 years of age and older, overall non-user levels decreased from 28% in 2004 to 24% in 2007, and the number of non-users who have never used the Internet and do not intend to in the future decreased from 19% of the entire population in 2004 to 13% in 2007. There was a corresponding increase in non-users who had been online in the past, from 34% in 2004 to 45% in 2007.

There were no significant differences between 2004 and 2007 in the reasons non-users gave for not being online.

In 2004, one in three non-users said that they would use the Internet in the future. Of the remaining and continuing non-users in 2007, 40% indicated they would use the Internet in the future. In 2007 more non-user expected converts and casual engagers plan to be online sooner than did those in 2004.

Table 4-10 compares non-users across subgroups in 2004 and 2007. There has been a considerable increase in casual engagers or intermittent Internet users — from 19% to 29%. Further evidence of increased conversion to online engagement by non-users appears when looking at the decrease in expected converts. Evidently, some of these individuals have gone online in the last three years.

Finally, while the hard core non-user group has decreased from 54% to 44% of all non-users, the current level of one in four non-users who have never used the Internet and do not intend to do so in future remains high.

Table 4-10 Non-user group breakdown: 2004 to 2007

Internet Non-user Category	Percentage of Internet Non-users		
	2004	2007	+ / -
	%	%	
Casual engagers	19	29	+10
Departed users	13	16	+3
Expected converts	15	11	-4
Hard core non-users	54	44	-10

CIP 2004 (n=806); CIP 2007 (Internet non-user respondents, 18 years +, n=627)

Note:
- For each variable, some column totals may not add to 100% due to rounding.

4.11 Conclusions

While penetration levels in Canada are very high relative to other countries around the world, it is important to understand why nearly one in four remains offline, particularly given Canada's advanced technological infrastructure and almost limitless opportunity to access the Internet. Most of Canada's non-users come from the following demographic groups: Anglophones, residents of Quebec, older citizens, retired, and from smaller communities where Internet access is more challenging. Cost is not as important a reason for not accessing the Internet as traditionally believed. Lack of interest, lack of access and lack of confidence in the capacity to use technology appear to be the most important reasons for individuals not being online.

When classifying Internet non-users into categories based on whether they previously accessed the Internet, and whether they intend to do so in the future, most are hard core non-users who

have never been online before and will not use the Internet in the future. Predominantly, these are elderly Canadians, the mean age of which is 68. However, three in ten non-users are actually casual engagers, who simply use the Internet more intermittently than those classified as current users. At the time of this study, 11% of all non-users had never used the Internet before, but most intended to be online within the next year.

While it is promising that penetration levels continue to increase, there seems to be a constant group of 12% of all Canadians who, for various reasons, have not used and will not use the Internet. Most hard core non-users and departed users express considerable discomfort with technology and make significantly more use of conventional media than do other non-users; they remain reliant on television, radio, newspapers and books as their media diet. Trend analysis of patterns for the Internet non-user indicates an overall increase in Internet users, an increase in casual engagers, and continuing relatively high levels of hard core non-users.

5 Access and Use of Information and Communication Technologies (ICTs)

5.1 Key Findings

- Broadband access is found in 80% of Internet user households, which represents a 54% penetration level across all Canadian homes; this is a 13% increase since 2004
- High-speed connectivity to the Internet is evenly divided between cable (37%) and high-speed ADSL telephone services (36%)
- Only 15% of households use low-speed dial-up telephone modems while less than one in ten rely on more advanced high-speed connection modalities, such as satellite and wireless services
- A majority of Internet users in every demographic category have a high-speed connection
- The heaviest and the most experienced Internet users are more likely than average users to have a high-speed connection
- It appears that Internet users subscribe to broadband because online information and entertainment services are important to them
- Access by cable or telephone varies by region and community size; rural areas are the heaviest users of dial-up telephone connectivity to the Internet
- One in three Internet users (32%) makes use of some type of wireless device
- Heavy and more experienced users, as well as wealthier and younger users, are more likely to use wireless devices than are other users
- More than eight in ten Canadian households have at least one computer; almost all Internet users have access to a computer at home (97%)
- Multiple computer households (two or more) have increased significantly (25% in 2004 versus 40% in 2007)
- The high penetration level of those households with more than one computer demonstrates that computers have become a personal utility for Canadians, similar to radio and television
- There is a high penetration of various information and communication technologies (ICTs) in Canada, from VCR/DVD players to HDTV receivers and video game consoles
- Compared to non-users, Internet users are heavier/more frequent users of virtually all communication devices
- Heavy Internet users tend to use all media and technologies more than do other users, supporting the notion that higher levels of media consumption are a reliable predictor of adoption and more frequent use of all media and technologies
- Internet users who spend a great deal of time online are also more likely to use other communication and entertainment devices such as cell phones and MP3 players
- New devices, like Slingboxes and Apple TV, are at the beginning of the adoption cycle and are found only in a few households; they are more likely to be present in households with young adults (18–29)
- In Canada 71% of households have at least one cell phone
- Most use their cell phone for voice communication for an average 2.5 hours per week
- Canadians under 30 years of age are much more likely than older Canadians to use the cell phone as a multi-functional digital device
- Youth (aged 12–17) use a variety of cell phone applications, including text messaging, taking pictures, downloading ringtones or music, playing games, and watching videos or television, twice as frequently as adult cell phone users
- Only one in eight Canadians uses a cell phone to surf the Internet or send e-mails whereas penetration levels are double for youth cell phone users engaged in Internet-related activities on their mobile devices (27%)

- Overall, Canadian cell phone users do not use non-voice functions very frequently; while youth demonstrate adoption behaviour that may see this increase over time, it could also be that there are culturally specific causes that curtail uptake of other mobile device functions and services
- Although landline telephones continue to be important, about half of Internet users report that being online has reduced their telephone use somewhat
- Overall, from 2004 to 2007, there has been steady growth in household acquisition of most communication devices; ownership of MP3 players jumped dramatically from an 18% penetration level in 2004 to 42% in 2007

5.2 Technology and the Internet

Canadians are heavy users of communication and entertainment technologies, from high-speed Internet to cell phones and portable game consoles. As early adopters, Canadians have long embraced information and communication technologies (ICTs), particularly in the home, using landline telephones and cable television services long before the advent of the Internet. Today landlines — originally for voice communication, information and entertainment delivery — are the major modes of Internet distribution in Canada. Satellites and other wireless devices are making inroads, but in the medium term, wired connectivity through PCs is likely to remain the primary mode for Internet delivery.

This chapter looks at Internet connectivity — broadband via cable and high-speed telephone (ADSL) versus low-speed telephone (dial-up modem) services. It also examines adoption patterns for a variety of wired and wireless communication and entertainment devices, with special attention given to younger, more experienced and more frequent users as the likely early adopters of new technologies.

5.3 Type of Internet Connection

Four in five Internet users, or 54% of all Canadians, declared that they have access to a broadband connection. The two most common communication technologies used to make the broadband connection are cable (37%) and high-speed telephone (36%). Only 6% connect to the Internet at home via satellite or through a public wireless network in their immediate neighbourhood.

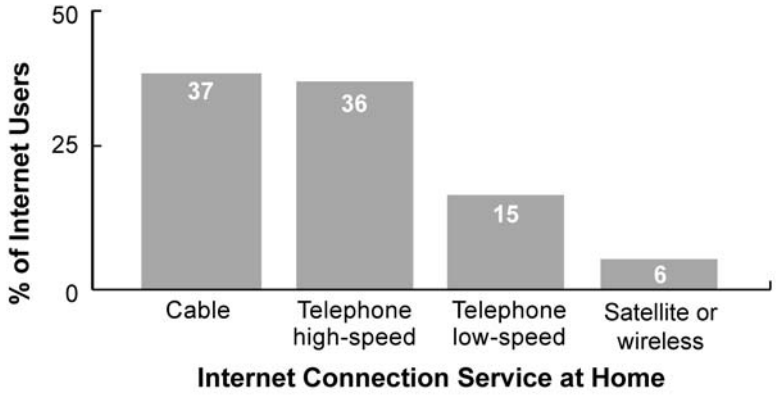
There remains a group of 15% Canadian Internet users that connect via a dial-up modem or low-speed telephone service. About 2% of Canadians use some other form of connection (which may or may not be broadband), and 5% of Internet users do not have any Internet connection at home.[7] Very few use more than one connection modality from home to connect to the Internet.

5.3.1 High-speed Connectivity

A majority of Internet users in most demographic categories report that they have a broadband connection at home. Table 5-1 provides a breakdown of the various Internet connection modalities found in the household across demographic and other variables.

[7] It is not always clear to the average survey respondent whether they have a full broadband connection and how that relates to their actual telecommunication connection into the home. The results tell us that among those surveyed, 91% of those who subscribe to cable for Internet connections, 89% of those with high-speed telephone service and 92% of those with satellite/wireless services claim to have a broadband connection.

Figure 5-1 Internet connection at home



CIP 2007 — C2.073m1–o1 (Internet user respondents, 12 years +, n=2226)

Table 5-1 Connectivity in the home across demographic and other variables

Demographic and Other Categories	Connection to the Internet				
	Broadband	Cable	Telephone high-speed	Telephone low-speed	Wireless devices
	%	%	%	%	%
n	*1978*	*821*	*799*	*334*	*2359*
Internet users	**80**	**37**	**36**	**15**	**32**
Language group					
Anglophone	79	33	38	14	34
Francophone	78	45	27	20	24
	**ns*				
Region					
British Columbia	88	44	37	6	32
Alberta	77	34	37	15	40
Prairie Provinces	77	21	45	15	25
Ontario	80	36	39	13	35
Quebec	78	46	26	23	23
Atlantic Provinces	71	22	37	21	35
Age					
12–17	81	34	36	15	35

Demographic and Other Categories	Connection to the Internet				
	Broadband	Cable	Telephone high-speed	Telephone low-speed	Wireless devices
	%	%	%	%	%
18–29	88	37	40	9	40
30–44	81	38	35	15	37
45–59	77	36	36	17	29
60+	70	36	34	20	16
		*ns	*ns		
Education					
High school graduate or less	79	38	35	16	28
Attended college/university	78	38	38	18	30
University degree +	82	39	39	13	39
	*ns				
Income					
<$40,000	74	32	35	18	21
$40,000–$59,999	76	30	38	18	24
$60,000–$79,999	78	34	38	18	27
$80,000+	86	44	36	10	45
			*ns		
Community size					
1,000,000+	86	47	35	11	34
500,000–999,999	88	43	39	6	38
100,000–499,999	85	36	42	12	38
5,000–99,999	82	36	39	13	30
<5,000	53	18	29	34	22
Experience online					
<6 years	72	31	34	18	21
6–<10 years	79	39	36	14	29
10–<15 years	84	38	38	14	38
15 years +	85	41	37	15	43
			*ns	*ns	
Level of engagement					
Light user (<5 hours)	64	31	29	22	13
Moderate user (5–<15 hours)	77	39	34	17	22

Demographic and Other Categories	Connection to the Internet				
	Broadband	Cable	Telephone high-speed	Telephone low-speed	Wireless devices
	%	%	%	%	%
Heavy user (15 hours +)	89	39	43	10	50

CIP 2007 — C2.073m1–o1, 074, 075 (Internet user respondents, 12 years +)

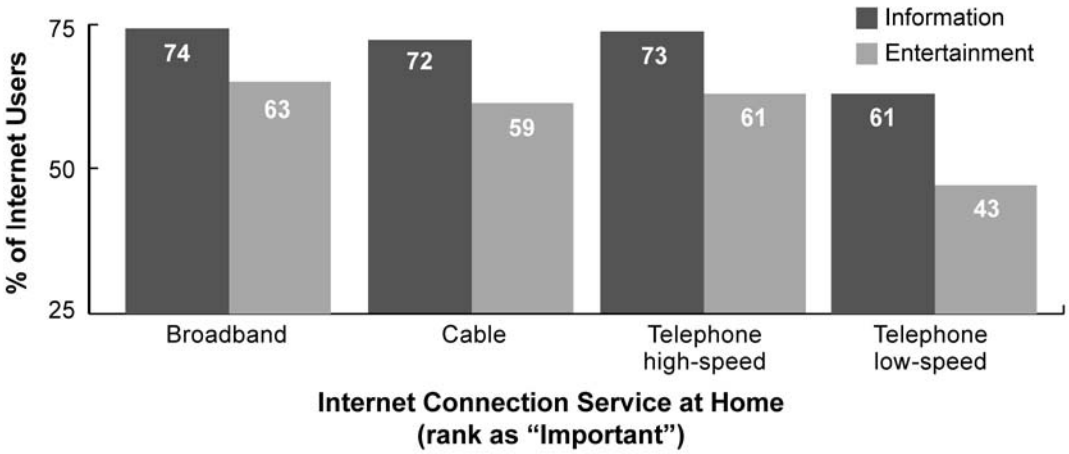
Notes:
- For each variable, some column totals may not add to 100% due to rounding.
- Differences not statistically significant at the .01 threshold are indicated by *ns.

As can be seen in Table 5-1**,** broadband users tend to more frequently be younger Canadians, wealthier, more educated and from larger sized communities. The highest level of high-speed connectivity was found in British Columbia (88%), whereas the lowest level was in the Atlantic provinces (71%) There was no discernible difference in broadband penetration levels between Anglophones and Francophones. Within each language category, three of every four online use high-speed devices to connect to the Internet from home.

The best predictors of broadband access are level of engagement expressed in hours per week and experience online. The heavier and more experienced a user is, the more likely she/he is to have broadband access. Nine in ten Internet users who are online for 15 or more hours per week have high-speed access to the Internet. Dial-up telephone modem users tend to use the Internet much less frequently and have considerably less experience than do broadband users.

This study asked a number of questions regarding the importance of various media for information and entertainment. Further elaboration and comparisons among media will be presented in Chapter 9. For the current discussion, Figure 5-2 provides the findings ranking the importance of the Internet at providing information and entertainment.

Figure 5-2 Impact of Internet household connection on the perceived importance of the Internet as source of information and entertainment



CIP 2007 — C2.073Ta, C2.074, C2.043a C2.050a (Internet user respondents, 12 years +, n=2101)

As can be seen across all connection modalities, the Internet is consistently ranked as more important for information than for entertainment. However, those with high-speed connections are much more likely than users without to state that the Internet is an important source for both information and entertainment. Those who access the Internet via low-speed services gave the lowest importance ranking for the Internet as a source of entertainment.

It seems likely that gaining convenient access to information and entertainment content and services is an important reason for subscribing to a broadband service. Of course, it may also be the case that, once a high-speed connection is available, the information and entertainment content and services become more important for specific users.

5.3.2 Cable versus Telephone (ADSL) Connectivity

In an environment of fierce competition between cable and telephone companies to enlist Internet customers, the market is fairly evenly divided between cable and telephone Internet service providers. As Table 5-1 further illustrates, there exist several interesting differences between the two predominant high-speed connection modalities — cable and telephone.

French-speaking Internet users appear to use low-speed more frequently than do Anglophones. One in five Francophone Internet users still uses dial-up modems versus 14% of Anglophones. French-speaking Canadians have a heavier reliance on cable compared to telephone for connecting at high speed to the Internet (45% versus 27%). For high-speed connectivity, proportionally, there is much greater penetration of cable versus telephone for Francophone compared to Anglophone Internet users.

Quebec possesses the highest level of Internet connection through cable (46%) compared to the rest of Canada (21% to 44%). The highest penetration of ADSL telephone is found in the Prairie provinces (45%). Conversely, Quebec has the lowest penetration level of high-speed telephone connection at 26%, versus a range of 37% to 45% in other provinces and regions. The Prairie provinces have the lowest uptake of cable (21%). Quebec (21%) and the Atlantic provinces (23%) share the highest proportion of low-speed connectivity to the Internet in all of Canada.

Age, education and income categories show no statistically significant differences for high-speed connectivity to the Internet via cable or telephone. However, older Canadians are more likely to have a dial-up telephone connection than are other age groups. Additionally, those more educated and wealthy are least likely to use low-speed connection devices to access the Internet.

There is a strong relationship between community size and being connected to the Internet by cable. Nearly half of the households in major cities (population of one million or more) use cable, as do almost as many in cities with populations between 500,000 and one million (45%). About one-third of households in smaller cities and towns (population between 5,000 and 500,000) use cable, but only 19% of those in rural areas do so. This appears to be primarily a function of the availability of cable outside of cities and towns. Penetration levels for high-speed connection to the Internet using the telephone provide a more even distribution pattern across varying community populations. As might be expected, given greater technological and accessibility issues, communities with the fewest inhabitants (less than 5,000) have the highest level of low-speed telephone connectivity to the Internet at 34%.

Level of experience online appears to have little impact on what connection device is used to access the Internet. Patterns across experience level categories are fairly evenly distributed, with the exception of cable, which is used by proportionally more individuals with considerable online experience than are other devices.

The level of engagement based on time spent online (light, moderate and heavy Internet users) shows a positive relationship with both cable and telephone high-speed modalities. Heavy Internet users (15 hours or more per week) have the highest penetration levels with both cable

(39%) and high-speed telephone (43%) connections. The highest proportion of those who use low-speed dial-up modems is light Internet users (22%).

With the advent of greater bandwidths and access speeds, the competition among Internet service providers is expected to continue and result in greater differentiation of households by the capacity and speed of their Internet connections.

5.3.3 Wireless Connectivity

As reported in Chapter 3, approximately one-third (32%) of Canadian Internet users connect to the Internet at some point using a wireless connection (either built-in to a computer, or via cell phones or personal digital assistants (PDAs)). Table 5-1 provides a comparison of wireless penetration in general to other devices used to connect to the Internet.

The level of wireless connection is highest among heavy Internet users (50%) and those who are most experienced using the Internet. Of those with 15 years or more experience online, 43% use wireless devices to connect to the Internet.

Wireless device users appear to be wealthier and more educated and are more likely to be younger or middle-aged than those who do not use wireless technology. They tend to come from larger-sized communities. The highest frequency of use across Canada is in Alberta, Ontario and the Atlantic provinces. Anglophones have higher adoption levels than do Francophones (34% versus 24%). Though not shown in Table 5-1, it is interesting to note that there is a much greater adoption level of wireless devices by men (38%) compared to women (26%). In addition, comparing professional status, students (40%) and those employed (36%) have the highest penetration rate; only 21% of stay-at-home individuals and 11% of those retired use wireless connections to go online.

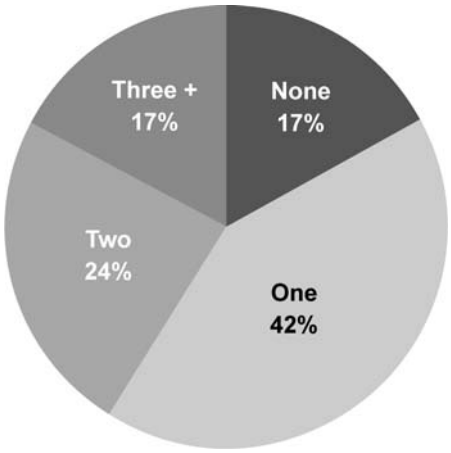
Wireless connection to the Internet has become a necessity for some of these groups and is a frequently used method of connection for a substantial proportion of them. While wireless connectivity is expected to continue to grow, it is anticipated that it will be a supplement to wired connectivity rather than a replacement for it for the foreseeable future.

5.4 Computers in Households

The ICT most quickly proliferating in the household is the computer. It is becoming one of the most common devices at home, next to the telephone, television, VCR and radio. Given it is the key linking device used to connect with the Internet, its penetration level is important to consider.

Among all Canadians, 83% have at least one computer in their homes. While most have only one, four in ten have at least two in their households. Virtually all Internet users have at least one computer at home (97%). Only about one in three non-users has a computer at home. Of those who have at least one computer at home, 58% use a networking device and 48% use a wireless router of some kind. Internet users are three times more likely to make use of these devices than are non-users. These findings further corroborate the conclusions reported in Chapter 4, that Internet use is closely related to a general propensity towards digital technology. Those online are more apt to have and use these technologies in their households.

Figure 5-3 Number of computers in the household



CIP 2007 — C2.064F (All respondents, 12 years +, n=3037)

While Internet users are more likely to have a computer in their household than are non-users (97% versus 36%), they also tend to have more computers at home. Of all Internet users, 51% have two or more computers at home compared to only 8% of non-users. On a regional basis, individuals from British Columbia (47%), Ontario (46%) and Alberta (45%) are more likely to have more than one computer at home than are individuals from Quebec (36%), the Prairie provinces (35%) and the Atlantic provinces (31%). The profile of those with a multiplicity of computers in their households is congruent with that of Internet users in general.

Profile of those with more than one computer at home:

- More likely to be Anglophone than Francophone
- Most often young adults (aged 18–29)
- Wealthier and possessing a higher level of education
- Primarily employed versus student or retired
- Mainly heavy Internet users with considerable experience online

5.5 Household Use of Information Communication Technologies (ICTs)

Use of ICTs in the household reveals overall adoption levels as well as the way that various subgroups of the population respond to technology in general. Are there differences in penetration levels across particular demographic categories that point to other behavioural patterns? Does the use of household technologies and appliances predict Internet use? Is there evidence of a cascading effect when it comes to technology adoption, or should the use of individual devices and appliances be considered independent of one another?

Canadians have an international reputation as early adopters and prolific users of technology, particularly in the home. CIP asked respondents about their use of more than a dozen common household devices and appliances — some old, some new — to ascertain both diffusion levels and any behavioural tendencies in adoption across demographic subgroups.

In the analysis, ICTs were separated into two groups: selected general devices and those technologies related to one of the most pervasive non-Internet devices — the television. While there are interesting comparisons to be made across all demographic variables, this discussion focuses on four important comparisons where the most dramatic differences were found in the adoption of ICTs: age — youth (aged 12–17) versus adults (18 years and older); Internet users versus non-users; heavy Internet users versus other users; and language groups — Anglophones versus Francophones. Figures 5-4 through Figure 5-9 show the penetration levels across these

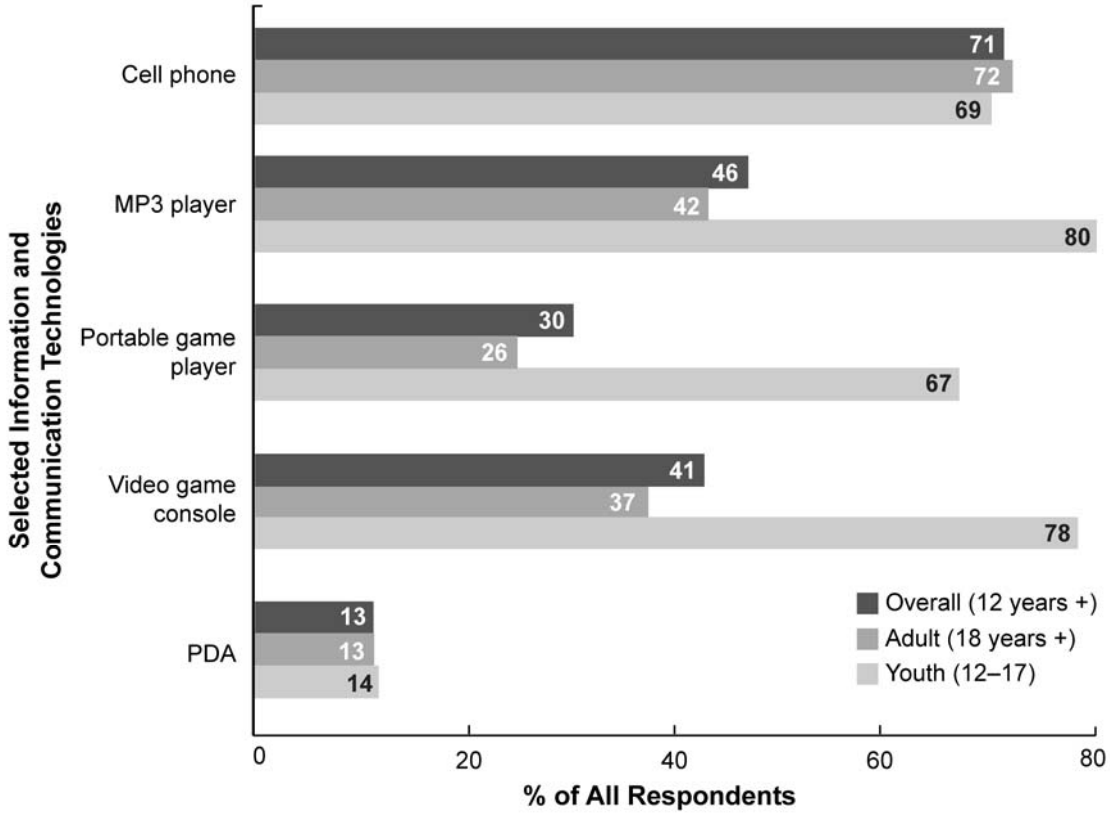
categories. In addition, any other remarkable demographic comparisons, where evident, are noted.

5.5.1 Selected Common ICTs in the Household

As Figure 5-4 illustrates, cell phones are one of the most pervasive ICTs, used in seven in ten households. Youth (12–17) are as likely to own them as are adults. At least one-third of Canadian households have a gaming device, with a higher proportion (41%) possessing a video game console compared to a portable gaming device (30%). As might be expected, households where youth are present are much more likely to have a gaming device than are adult-only households. More than twice as many youth respondents as adults report possessing a portable or console gaming device.

Almost half of all Canadians use an MP3 player for music listening. Once again, adoption levels for youth (80%) are approximately double that for adults (42%). PDAs, such as the Blackberry and PalmPilot, are the least owned devices in this group of selected ICTs. Only 13% of Canadians reported having one in their household. There is no difference in penetration levels of PDAs between youth and adults. Overall, these results demonstrate that, compared to adults, youth are much more apt to adopt ICTs in the household.

Figure 5-4 Selected ICTs in the household across adult and youth samples

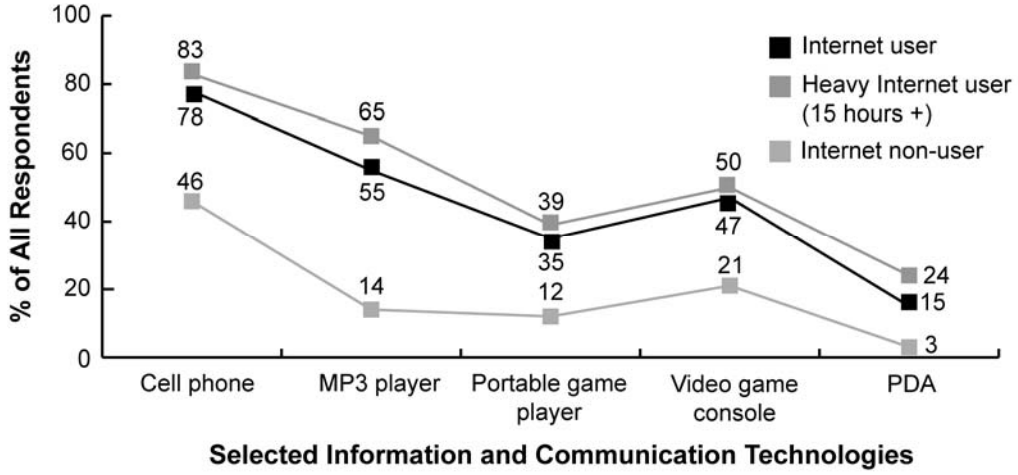


CIP 2007 — C2.021, 014, 011, 010, 009, 020 (All respondents, 12 years +, n=3037)

As shown in Figure 5-5, Internet users more frequently possess each of the ICT devices in the selected group than do non-users. Consistently, at least twice as many Internet user households have these ICT devices compared to those of non-users. For heavy users of the Internet, the

level of penetration of ICTs is even higher: Canadians who use the Internet at least 15 hours per week have significantly more ICTs than do other Internet users and Internet non-users. Those who use some media often are most likely to possess and use other ICTs often as well.

Figure 5-5 Selected ICTs in the household across Internet user and non-user groups



CIP 2007 — C2.021, 014, 011, 010, 009, 020 (All respondents, 12 years +, n=3037)

Figure 5-6 provides a comparison of ICTs in the household across language groups. For most devices, Anglophones have much higher adoption levels than do Francophones. The only exception is the finding that there are no statistically significant differences in possession of video games consoles between English-speaking and French-speaking households. Four in ten households across each language category own a video gaming device.

Overall, these ICTs are more frequently found in the households of wealthier and more educated respondents. The highest adoption levels were found in Alberta, British Columbia and Ontario while the lowest levels were consistently found in Quebec. Differences across gender were most evident with respect to ownership of PDAs (15% of males versus 10% of females), video game consoles (46% of males versus 37% of females) and MP3 players (51% of males versus 41% of females).

5.5.2 Television-related ICTs in the Household

Figure 5-7 presents a series of common and not so common devices used to watch videos and television, and compares adoption levels of these devices by all Canadians, adults only and youth only.

Next to the telephone and television, DVD and VCR playback devices are the most ubiquitous of all household appliances, with an overall penetration rate of 94% for all Canadians. Slightly more youth respondents (97%) have a DVD or VCR in their households compared to adult respondents (94%). While between two and three in ten households have more advanced and premium television viewing appliances such as PVRs or digital recording devices, HDTV television receivers, and HDTV and video-on-demand (VOD) set-top boxes, there is a much greater proliferation of these devices in the households of youth respondents.

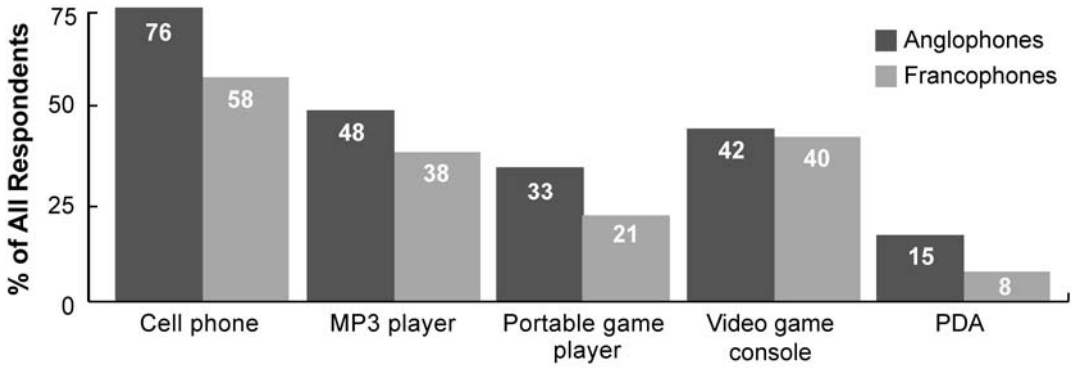
The same pattern is evident for satellite television receivers; 37% of youth compared to 28% of adults declared possessing a satellite receiver for television. New technologies used to watch television online, such as the Slingbox or Apple TV, are still nascent and currently in only 3% of all households. However, further evidence that youth more readily adopt new technologies than do adults is illustrated in the fact that three times as many youth respondents (9%) as adult respondents (2%) reported having a Slingbox or Apple TV in their households.

Figure 5-8 presents differences between Internet users and non-users across television-related ICTs in the household.

A consistent pattern emerges from these data demonstrating that those with a predisposition towards technology tend to have and use advanced technologies more frequently than those without such a predisposition. Internet users are more likely than non-users to have conventional as well as advanced television appliances in their households, though the gap is not as pronounced as with other ICTs. Internet non-users rely heavily on television for information and entertainment. Therefore, they tend to have high levels of adoption across television-related devices. More significant differences in uptake are apparent in advanced and sophisticated appliances, such as HDTV and VOD and HDTV set-top boxes. For these devices, penetration levels for Internet users are double those of non-users.

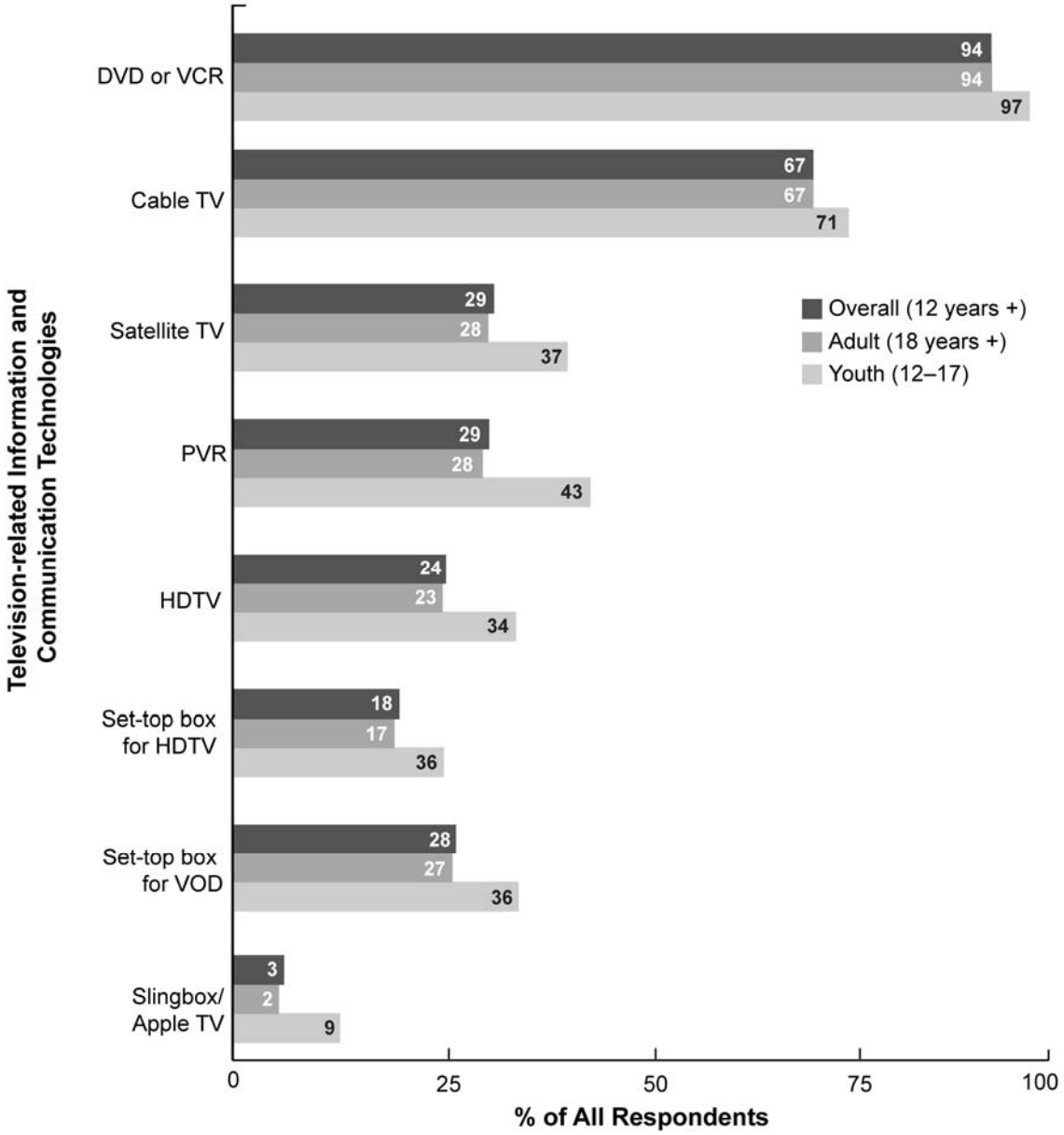
Across all devices and technologies, the highest levels of household adoption are found in the heavy Internet user subgroup. Heavy users appear to be simply more involved with media than are other Internet user and non-user subgroups, not only with respect to technologies that require computer connection and access to online content (e.g., MP3 players, PDAs, gaming equipment), but also across television-related technologies. As discussed in Chapter 4, Internet non-users are less comfortable with and less interested in technologies in general when compared to Internet users.

Figure 5-6 Selected ICTs in the household across language categories



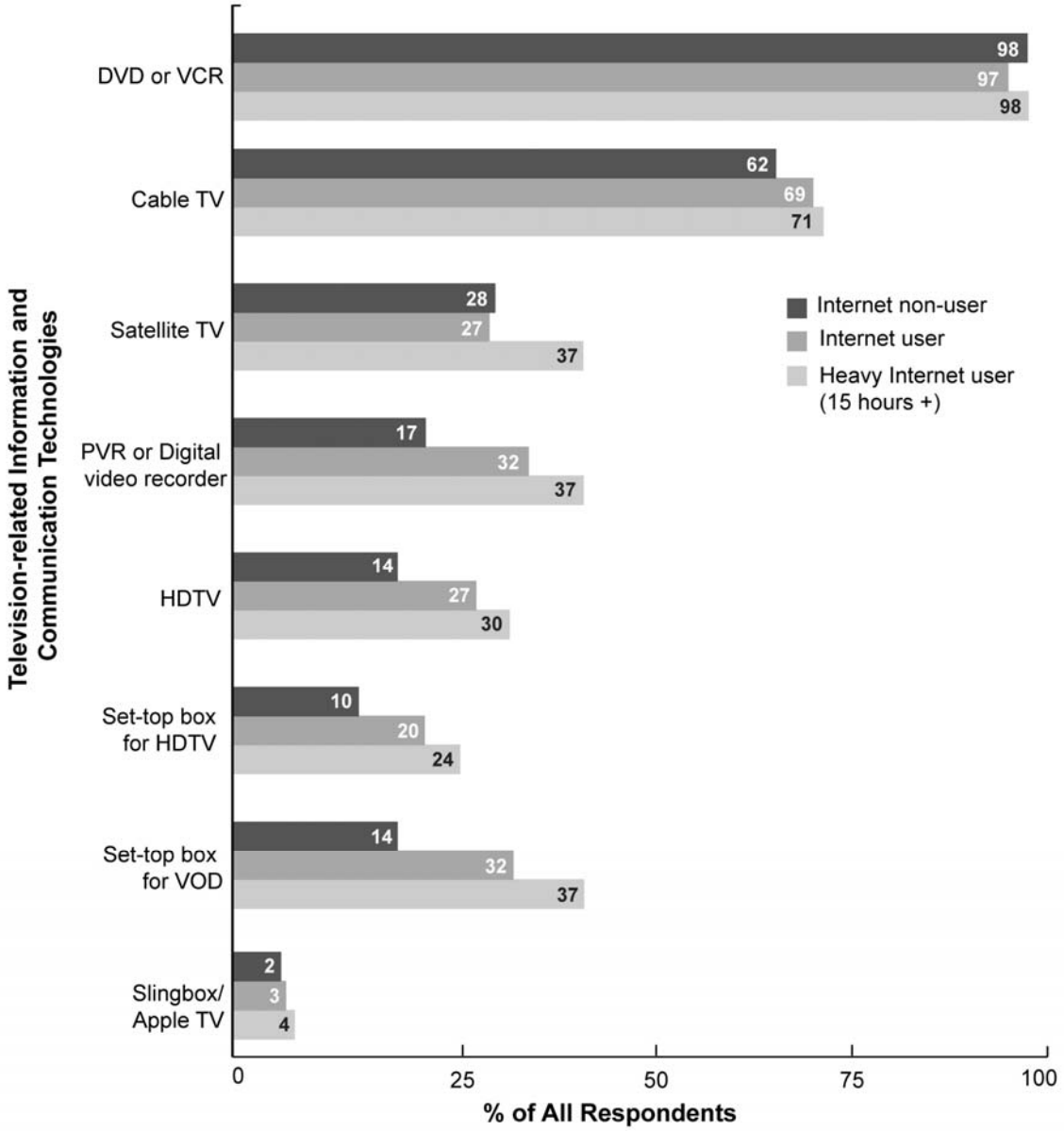
CIP 2007 — C2.021, 014, 011, 010, 009, 020 (All respondents, 12 years +, n=3037)

Figure 5-7 Television-related ICTs in the household across adult and youth samples



CIP 2007 — C2.012, 015, 016, 013, 017–019 (All respondents, 12 years +, n=3037)

Figure 5-8 **Television-related ICTs in the household across Internet user and non-user groups**



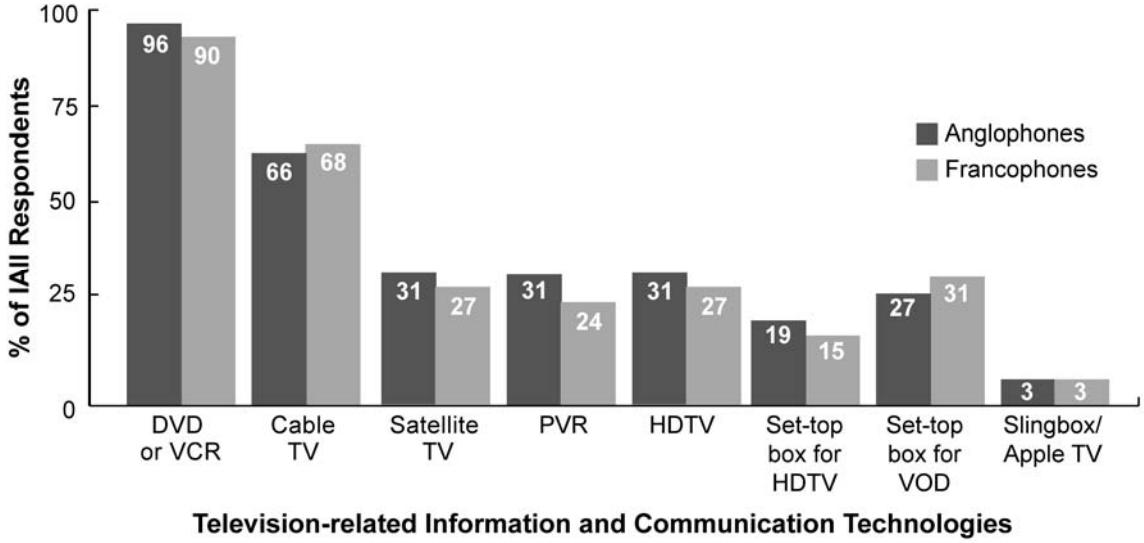
CIP 2007 — C2.012, 015, 016, 013, 017–019 (All respondents, 12 years +, n=3037)

Figure 5-9 shows differences in household ownership of television-related devices across language groups. While there are only slight differences across English-speaking and French-speaking households for most devices, exceptions exist for more advanced viewing devices such as PVRs or other digital recording devices. Thirty-one percent of Anglophone households compared to 24% of Francophone households have this device at home.

Similar patterns exist for HDTV set-top boxes and DVDs or VCR playback devices in the household. Anglophones are more likely to have these devices than are Francophones. A similar

finding emerges in Internet adoption patterns: Francophones are less likely to adopt newer technologies than are Anglophones, and appear less partial to new technologies in general.

Figure 5-9 Television-related ICTs in the household across language categories



CIP 2007 — C2.012–019 (All respondents, 12 years +, n=3037)

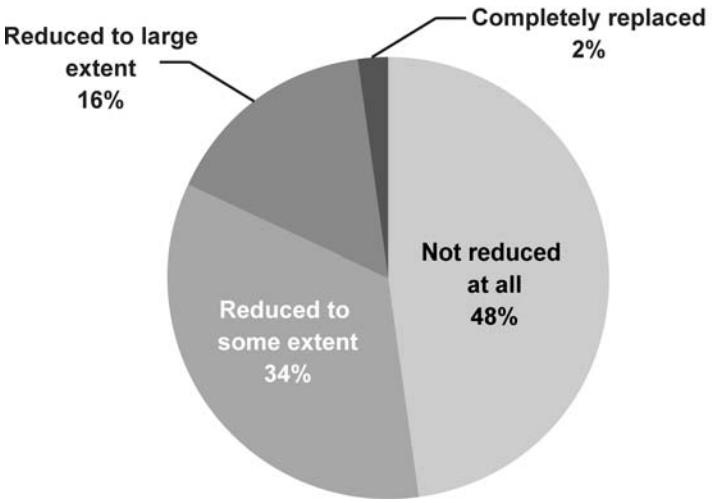
Consistent with the pattern found when analysing selected ICTs, uptake of television-related devices appears highest in households of more educated and wealthy Canadians. Affordability is certainly a factor in adopting newer technologies. There are no differences in penetration levels based upon gender, just as for non-television-related technologies, reported above. The regions in Canada with the highest number of households that have adopted television-related ICTs continue to be Alberta, British Columbia and Ontario. Quebec has the least number of technology adopters, as indicated by ICT penetration levels.

5.6 Landline Telephones and the Internet

The landline telephone has the highest penetration level of all ICTs. At 96%, Canadians are among the highest users of landline telephones in the world. Further examination of telephone usage in comparison with other conventional media is provided in Chapter 6. However, for the purpose of the current discussion, it is important to consider wired telephone use with respect to Internet usage.

It may be expected that the use of the Internet, especially for e-mail, text messaging and connecting with various social networks, may have started to replace at least some of more traditional telephone use. The effect of Internet access on telephone use for Internet users only is shown in Figure 5-10.

Figure 5-10 Impact of Internet use on traditional telephone use



CIP 2007 — C2.093 (Internet user respondents, 12 years +, n=2332)

Canadians are divided on whether the Internet has a direct effect on their use of landline telephones. Whereas just under half of Internet users feel the Internet has not reduced their telephone use at all, the other half report it has had at least some effect. Only 16% feel the Internet has replaced their telephone usage "to a large extent" and far fewer (2%) state their telephone use has been completely replaced.

Those most likely to claim that the Internet has reduced landline telephone use are younger Canadians and students. Not surprising, more experienced and frequent users of the Internet also reported more significant decreases in their use of the telephone for communication. Internet users who have broadband connections are almost twice as likely as those without to feel that the Internet has lessened their use of the traditional telephone (21% versus 12%). Across other demographic comparisons, half the population feel that the Internet has reduced time they spend on the wired telephone. It is worth noting, however, that even among these groups about four in ten claim their Internet use has not in any way diminished their traditional telephone use.

In general, new communication devices are not so much replacing traditional devices as supplementing them and, to some extent, altering use patterns. This also appears to be true even for the telephone. However as applications that provide telephone services via Internet such as VoIP and Skype proliferate and become more widely available, it is anticipated that landline telephone usage will diminish.

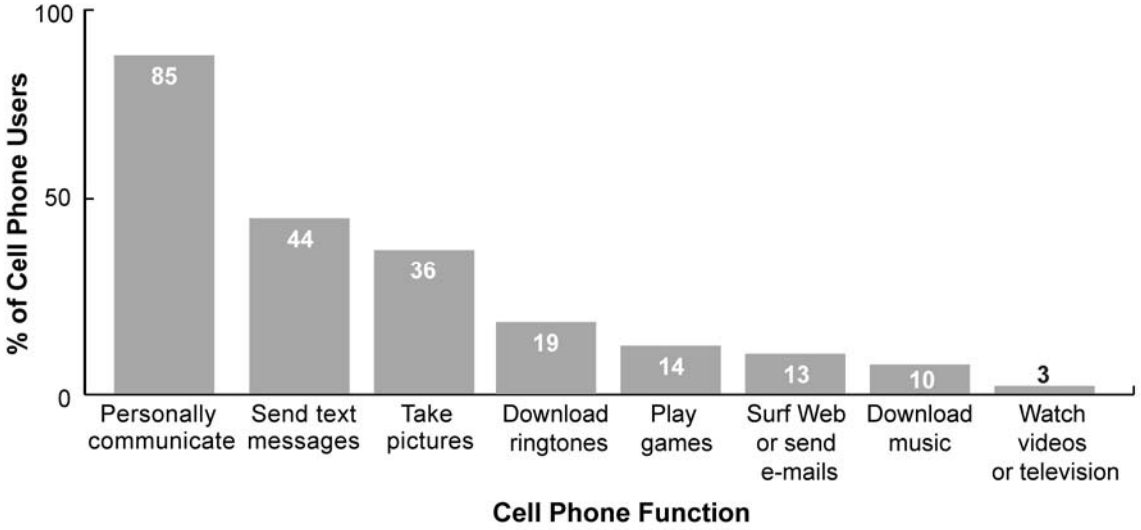
5.7 Cell Phones and Mobility

The vast majority of Canadian households have a resident who owns at least one cell phone (71%). Many more Internet users (78%) than non-users (46%) report having one in their home. Across demographic variables, there is a much higher penetration level of cell phones among Anglophones than Francophones (76% versus 58%). In addition, those in higher income households are more likely to own a cell phone than are those in lower income homes. Consistent with the use of all other ICTs, heavy and more experienced Internet users are more likely to own a cell phone than are other users. This continues to corroborate the study's

conclusion that greater use of media and technology commands an appetite for even more devices and appliances.

Isolating those who personally own a cell phone, the study further investigated the use of various mobile applications. Figure 5-11 presents the findings for eight discrete functions that cell phones can provide.

Figure 5-11 Cell phone functions used by cell phone users



CIP 2007 — C2.022–C2.029 (Cell phone user respondents, 12 years +, n=1837)

While the most common cell phone functions are personal voice communication (85%) and text messaging (44%), more than one-third of cell phone users have taken pictures with their phones (36%). Many fewer have downloaded music using a cell phone (10%). Nearly one in five has downloaded ringtones, and 14% has played games from a mobile device. Very few have used a cell phone to surf the Internet or send e-mails (13%) while the fewest Canadian cell phone owners have used the device to watch videos or television (3%).

To further elaborate on cell phone applications, Table 5-2 presents differences in adoption levels of cell phone functions across Internet user and non-user groups, as well as across age categories.

Table 5-2 Cell phone functions across Internet user subgroups and age

Demographic and Other Categories	Cell Phone Applications			
	Personally communicate	Send text messages	Take pictures	Download ringtones
	%	%	%	%
Overall (all cell phone users)	**85**	**44**	**36**	**29**

Internet users	87	47	38	20
Internet non-users	75	20	20	7
Sample				
Youth (12–17)	61	77	73	48
Adult (18+)	87	41	33	16
Age				
12–17	61	77	72	28
18–29	85	76	54	19
30–44	92	48	37	8
45–59	87	28	27	5
60+	85	10	13	3

Demographic and Other Categories	**Play games**	**Surf Web or send e-mails**	**Download music**	**Watch videos or television**
	%	%	%	%
Overall (all cell phone users)	**14**	**13**	**10**	**3**
Internet users	15	14	10	3
Internet non-users	8	7	5	2
				*ns
Sample				
Youth	48	27	28	7
Adult	12	12	9	3
				*ns
Age				
12–17	48	27	28	7
18–29	24	17	19	4
30–44	13	16	8	2
45–59	9	10	5	3
60+	1	4	3	2

CIP 2007 — C2.022–029 (Cell phone user respondents, 12 years +, n=1837)

Note:
- Differences not statistically significant at the .01 threshold are indicated by *ns.

Internet use has a strong positive relationship with the use of cell phone applications, but none of these functions attracts a majority of Internet users. Consistently, Internet users engage in more cell phone applications than do non-users. However, penetration levels remain 20% or less for most applications, with text messaging (47%) and taking pictures (38%) being two exceptions. While close to one-third of younger cell phone users (aged 12–17) use Internet services from mobile devices (27%), the average for all other age groups is only half this level (13%). As Table 5-2 illustrates, Internet non-users are less likely than users to have a cell phone and, even when they do, are less likely than Internet users to use it for anything other than personal or voice communication. Heavy Internet users and those with broadband connections are more likely than others to use each of the additional cell phone functions.

Evidently, in Canada, there continues to be considerable reliance on conventional linkages for Internet use and online interaction.

Age is a factor in having a cell phone for personal communication, and is a major predictor of how the phone is used. Those in the youngest age group (12–17) use the cell phone the least for personal communication, compared to the other age groups and the adult population (61% versus 87%). Yet younger cell phone users make considerably more use of all other applications studied here. As this group grows older, it is anticipated that Canadians' comfort in using the cell phone to engage in more Internet-related activities will increase.

Aside from voice communication, using the built-in digital camera and sending text messages are the most common applications that appear to have been readily adopted by cell phone users over 30 years of age. For those under 30, usage rates for these functions are much higher. Very few of the eldest cell phone users (60 years and older) make use of any additional functions; they use cell phones predominantly for voice communication.

In general, men are more likely than women to use the various cell phone functions, but differences are small. English speakers are more likely than French speakers to send text messages, download ringtones and play games on their cell phones.

An examination of time spent talking on cell and landline phones is quite revealing. Table 5-3 presents a breakdown of time spent in an average week using a cell phone versus a wired landline phone by age, gender and level of engagement demographics.

Contrary to expectations, youth (12–17 years) spend less time than adults talking on both kinds of telephone. Youth use cell phones an average of 2.3 hours per week (versus adults at 2.5 hours) and landline phones an average of 2.6 hours per week (versus adults at 3.8 hours).This could be the result of parents limiting both types of phone use by youth. However, as shown in Table 5-2, the use of other cell phone applications is significantly higher among youth than adults. Youth spend more time using cell phones for text messaging and other functions than they do for voice communication.

The national average is 2.5 hours per week spent talking on a cell phone and 3.7 hours on a landline telephone. Women spend more time than men using a landline telephone in an average week (4.4 versus 3.0 hours). Differences of cell phone use based on gender are not statistically significant.

While no differences were found between Internet users and non-users, heavy Internet users spend more time speaking on cell phones (an average of 3.2 hours in a typical week) and landline phones (4.5 hours) than other user groups. Once again, the study finds a strong positive correlation among those who use frequently use media and technology. Higher usage levels across any one medium or technology appears to predict adoption and higher usage levels of other media and applications.

Table 5-3 Time spent using cell phones and landline telephones across demographic variables

Demographic and Other Categories	Time Spent Using Device	
	Cell phone	Traditional telephone
	hours/week	hours/week
n	*1799*	*2874*
Overall (all cell phone users)	**2.5**	**3.7**
Sample		
Youth (12–17)	2.3	2.6
Adult (18+)	2.5	3.8
Age		
12–17	2.3	2.6
18–29	3.6	3.9
30–44	2.7	3.9
45–59	2.2	3.9
60+	1.2	3.7
Gender		
Male	2.7	3.0
Female	2.3	4.4
Level of engagement		
Light user (<5 hours)	1.5	3.0
Moderate user (5–<15 hours)	2.2	3.5
Heavy user (15 hours +)	3.2	4.5

CIP 2007 — C2.039SS–040SS (Cell phone and traditional telephone user respondents, 12 years +)

Note:
- Calculation of means is based on average hours of cell phone and traditional telephone users only, not including responses of 0.

These data make it clear that the cell phone is not yet a significant device for mobile access to the Internet. Only about one in eight Internet users in Canada ever uses a cell phone to surf the Internet or send e-mail. Mobile Internet use in Canada will probably not grow very rapidly until mobile devices are more convenient and more widely diffused. The penetration levels of various cell phone functions by youth suggest increased use for Internet activities as this demographic grows older. However, even the most advanced of currently available devices are convenient for

only a limited range of online applications. Additionally, there may be culturally specific reasons that North Americans, in general, do not more readily adopt cell phone applications. This warrants further investigation.

5.8 Trends: 2004 to 2007

Table 5-4 compares penetration levels of selected household devices between 2004 and 2007. Note that only variables that were measured in both CIP studies are presented in the table. Once again, in this analysis the 2007 sample includes adults only (18 years and older) in order to be consistent with the sample of respondents from 2004.

Changes in household technology and connectivity since 2004 are not, for the most part, substantial. The number of homes with a least one computer has increased slightly, from 75% in 2004 to 83% in 2007. The number with more than one computer has increased from about 25% to more than 40%. This latter finding supports the notion that the computer, like the radio, television and telephone before it, is shifting from being a shared household appliance to a personal device.

The percentage of households with a VCR or DVD (more than nine in ten) and cable (67%) has not changed, while satellite TV access is up slightly (from 26% to 29%), as is possession of a video game console (from 37% to 41%).

High-speed connectivity has increased slightly, from about seven in ten to eight in ten Internet users. As a result, the use of dial-up modems decreased approximately 10%. Cable and high-speed telephone connections share the market almost equally, as they did in 2004. The percentage of Internet users who do not have access at home has declined from 13% to about 5%.

Table 5-4 Household technologies — Selected devices: 2004 to 2007

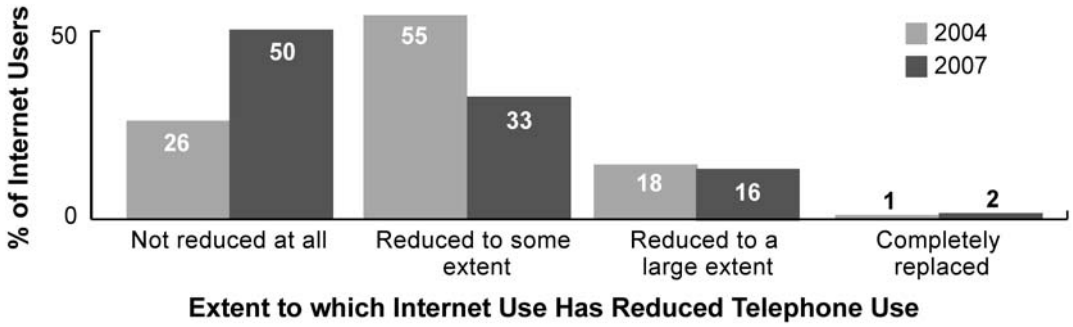
Household Device	Percentage of Respondents Who Use Device		
	2004	2007	+ / -
	%	%	
DVD or VCR *(C1.005, C2.012)*	92	94	+2
Cell phone *(C1.003, C2.021)*	64	72	+8
Video game console *(C1.004, C2.011)*	37	41	+4
MP3 player *(C1.007, C2.014)*	18	42	+22
PDA *(C1.002, C2.009)*	16	14	-2
Cable TV *(C1.008, C2.015)*	66	67	+1
Satellite TV *(C1.009, C2.016)*	26	28	+2
1 computer or more *(C1.032, C2.064)*	75	83	+8
2 or more computers *(C1.032, C2.064)*	25	40	+15
Broadband *(C1.032, C2.074)*	71	79	+8

CIP 2004 (n=3014); CIP 2007 (All respondents, 18 years +, n=2750)

The most notable changes apply to the ownership of MP3 players, which has increased for those 18 years and older from 18% in 2004 to 42% in 2007. PDAs continue to be in approximately one in seven households, while the percentage of homes with cell phones has increased slightly (from 64% to 72%).

Overall, with the exception of MP3 players and devices not being very widely available in 2004, the availability of household devices has not changed much. Because Canadians are relatively early adopters, what we have seen is steady growth or consolidation of older devices that remain popular, and fairly rapid adoption of new devices among youth and younger adults. Even landline telephone use is declining at a slower rate than in the early years of the 21st century. In 2007, 50% of Internet users reported no decline in telephone use as a result of being online; the comparable finding from 2004 was 26%.

Figure 5-12 Impact of Internet use on traditional telephone use: 2004 to 2007



CIP 2004 (n=1959); CIP 2007 (Internet user respondents, 18 years +, n=2072)

5.9 Conclusions

This analysis demonstrates clearly that, as reported in 2004, Canadians are early adopters and heavy users of communication technologies, broadly defined. Most households have computers and a wide range of other devices for bringing into the household games, cultural content and social connections. Mobile devices are growing steadily in popularity but the wired computer, cable and telephone lines continue to be the main forms of household connection with the outside world. The country has a strong communications infrastructure and most homes have the technology to access new products and services. The adoption curve continues to be led by young adults. Even as Internet penetration peaks, continued growth in high-speed options and mobile services is expected.

In future, the most important changes are likely to come from the increased use of mobile devices. As has been seen, nearly half of heavy Internet users make use of wireless connections. As mobile devices become more common, a proliferation of services designed specifically for small screens, shaping the nature of both text and image, can be expected. Throughout this discussion further corroboration for CIP's thesis is found — that there exists a strong positive correlation between use of all media and technology. Heavy Internet users are more likely to use other technology-based applications more frequently than are other users, as well as to spend more time doing so.

Cell phones are the most commonly used mobile devices, but are used primarily for voice communication. They are not yet used by most Canadians for accessing Internet services. Even younger Canadians are still not inclined to use their cell phones as wireless Internet devices to a great extent (though they do use them for this purpose twice as often as do adults). Penetration levels will definitely increase over time as youth become older. However, there may be culturally specific behaviour patterns of North Americans in general that results in lower mobile device and application penetration levels compared to the rest of the world. This warrants further investigation.

6 Use of Traditional Media

6.1 Key Findings

- Overall conventional media consumption by Canadians averages 45 hours per week, represented by the study's constructed index of typically used media and entertainment activities
- There is no difference in levels of total traditional media use between Internet users and non-users
- On average, youth (12–17 years) use traditional media 40 hours a week — 15% less or six hours fewer than do adults (18 years and older) at 46 hours per week
- Age is closely related to overall traditional media use — the older an individual, the greater the amount of traditional media consumed
- Use of the Internet and traditional media are related to age in the opposite direction: younger Canadians use the Internet more and older Canadians use traditional media more
- Young adults (18–29 years) consume high levels of traditional media
- The Internet is not replacing traditional media for younger Canadians; rather young adults are augmenting conventional media with content delivered by online and mobile devices
- The most popular non-Internet media activity for youth is listening to music, which accounts for 23% of their traditional media diet, compared to only 12% for adults
- In an average week youth spend much more time listening to music than do adults (9.9 hours compared to 6.6 hours)
- In an average week, adults spend more time watching television than do youth (11.3 hours compared to 7.6 hours)
- Television captures 23% of the attention share for Canadians over 18 years of age, compared to 20% for those 12–17 years of age
- Adults spend more time than do youth consuming traditional mass media, such as television, radio, newspapers and books, while youth spend more time than do adults listening to music, playing video games and attending movies at theatres
- The media use behaviour of Canadians is evolving towards increased concurrent activities or multi-tasking across several platforms and media
- Penetration rates and levels of engagement (time spent per week) remain exceedingly high for the most common mass media, such as television, radio, newspapers and landline telephones, across all demographic categories
- Television continues to be the predominant traditional medium, accounting for 21% of the traditional media diet for Internet users and 29% of the media diet for Internet non-users
- Considering online and traditional media activities together, the Internet represents 27% of the overall media diet for Internet users while television viewing represents 16% of their total media diet
- Internet users watch four hours fewer television per week than do non-users, a gap that has remained constant since 2004
- Heavy Internet users (15 hours or more per week online) consume substantially more conventional media than do average Canadians and light or moderate Internet users (less than 15 hours per week online)
- Overall, traditional media use for adults declined by 13% or five hours per week from 2004 (50 hours) to 2007 (45 hours)
- Traditional media use declined in similar proportion for Internet users and non-users between 2004 and 2007
- The overall pattern of media use by Canadians supports the notion that Internet activity augments traditional media, as opposed to displaces it
- Internet users tend to make greater use of all media and technologies than do non-users

- Traditional media use varies across several key demographic categories, including language, region, gender, age, income and education
- Overall, Anglophones consume much more traditional media than do Francophones

6.2 Introduction

In recent years, analysis of the attention share of media users has become more complex with the introduction of a myriad of delivery platforms that diversify the access points from which media can be consumed. Mobile phones also function as media players, Internet browsers, text message platforms and even television receivers. Consolidated media players may also include radios, photo albums, game devices, music and movie players, as well as computers and hard drives. Increasingly, consumers are heading towards a state of ultra-media access whereby they can reach any media at anytime from anywhere.

CIP's research confirms this pattern of ubiquitous access and identifies a decline in concern for the source of content. Increasingly, there is an expectation that all platforms will provide desired content and, therefore, conventional barriers preventing integration will diminish. These expectations and behaviours make analysis of media more difficult. Nevertheless, it remains important to identify and examine baseline consumption patterns.

This study includes various indices to compare traditional media activities across Internet user and non-user subgroups. The analysis focuses on specific media that represent the full range of overall media consumption — a typical media diet.

CIP examines media use in terms of access — frequency or percentage of the population who use each medium — and level of engagement — time spent consuming each medium, as expressed in average number of hours per week. In addition, the study explores the extent of media displacement, if any, as migration to emerging technologies and the Internet increases..

This chapter considers, firstly, the average time Canadians spend using each medium, with calculations based on the total population, including those who spent no time using the medium, and secondly, the average time spent by those who actually use the specific medium, excluding from the calculation respondents who estimated they spent no time with that medium. The first measure provides an indicator of the overall popularity of each medium and a relative ranking of prominence, while the second provides a measure of the intensity of use of each medium for those who spend time with it.

This chapter benchmarks the media use of all Canadians, noting the extent to which segments of the population use individual media and the reported hours they are engaged with them. While Chapters 3 and 4 look at users and non-users in relation to the Internet, this chapter examines users' and non-users' relationship to an array of traditional media. This examination is crucial to understanding the changes that are occurring in mass media, affecting the dissemination of information and the media business, both of which are changing as a consequence of the widespread adoption of the Internet as a primary medium for information and, increasingly, for entertainment.

In general, traditional media involve more passive consumption than do online media, which invite more user control and interactivity. Internet-delivered media are often referred to as "lean forward," while more traditional media, such as television, are more "lean back" experiences. Interactivity is the prime distinguishing feature between traditional and new media. Interactivity is an important factor in the appeal of new media.

CIP's examination leads to the conclusion that the Internet is, to a much greater extent than previously thought, supplementing rather than displacing other traditional media. This chapter will show some indicators as to the nature of changes that have occurred.

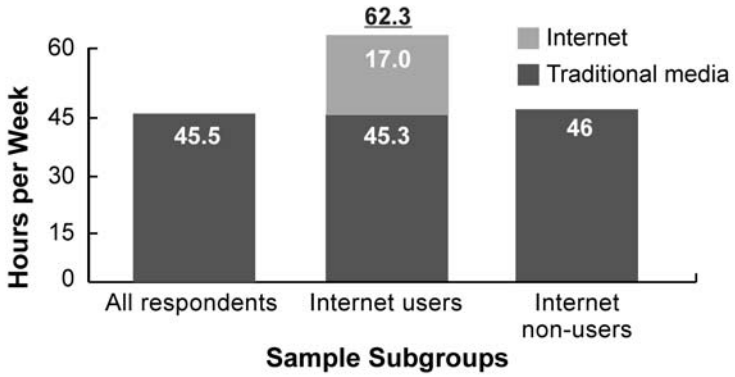
6.3 Multi-tasking and Traditional Media Use

Until recently, the conventional way of analysing media use behaviour would be to parse respondent's waking hours across different media into hours per week spent consuming each (television, radio, newspapers and so on). The expectation was that the total would never exceed the number of waking hours. However, this methodology may not be as effective as it was previously in demonstrating consumption patterns due to the recent proliferation of multi-tasking. This conclusion is based on an assumption that a significant share of media users is consuming different media concurrently.

When overall differences in media consumption between Internet users and non-users are examined, it is clear there is a pronounced divergence in their level of engagement expressed in average hours per week. Specifically, Internet users are engaged in all media (including online activities) for 62 hours per week, while non-users use all media 46 hours per week. A significant amount of this difference is, of course, time spent online (17 hours in total for users). It is also likely that a portion of this online time is spent concurrently with other traditional media, demonstrating increased multi-tasking behaviour. In fact, 76% of all respondents who used the Internet reported that they engage simultaneously with other media while online, such as listening to music, watching television, or using the telephone. On average, 40% of time online is spent attending to other activities at the same time.

Multi-tasking behaviour is discussed in more detail in Chapter 10. However, it is important to keep this behaviour in mind when examining media use patterns of Internet users and non-users.

Figure 6-1 Extent of overall media access: Internet users and non-users



CIP 2007 — C2.042TR, 083TT (All respondents/Internet user respondents, 12 years +, n=2633/2200)

6.4 Traditional Media Use Indices

Table 6-1 examines the frequency of traditional media use by all Canadians, and compares Internet users and non-users. These findings were derived from responses to the question, "During a typical week, how many hours and minutes, if any, do you spend on the following activities that are not on the Internet?" Frequency levels are based on the total number of respondents who indicated they had spent any time on a specific medium.

Table 6-1 Frequency of access to traditional media

Media Use or Activity	Respondent Subgroups			
	n	All respondents	Internet users	Internet non-users
		%	%	%
Traditional telephone	*2981*	96	**97**	94
Television **ns*	*2998*	95	95	94
Radio	*2983*	86	**87**	80
Music: CDs, albums, tapes, MP3s	*2964*	83	**88**	68
Books	*2993*	81	**84**	67
Newspapers **ns*	*3001*	78	78	78
Movies/television pre-recorded at home	*2990*	73	**80**	49
Magazines	*2991*	67	**69**	59
Cell phone	*2992*	60	**68**	34
Attending sporting/ live entertainment events	*2944*	38	**42**	25
Movies in theatres	*2921*	35	**40**	18
Attending performing arts/cultural events	*2921*	34	**38**	21
Video games not on the Internet	*3015*	24	**28**	9

CIP 2007 — C2.030F–042F (All respondents, 12 years +)

Notes:
- Differences not statistically significant at the .01 level are indicated by *ns.
- The highest consumption levels between Internet users and non-users are indicated in bold where differences are statistically significant.

6.5 Frequency of Traditional Media Use

After wired landline telephones, television is the most popular traditional medium in terms of frequency of use. Overall, Internet users tend to make more use of all media than do Internet non-users. In fact, a greater number of Internet users than non-users make use of wired telephones, the medium that has become the staple of all Canadian households.

This shows us that those who use the Internet appear to have a greater propensity for all media in general. Although between Internet users and non-users differences are marginal in terms of frequency of use of wired telephones, television, radio and newspapers, in some cases the findings reveal a considerable difference in adoption of other media, most notably technology-dependent devices such as cell phones and video games.

Also noteworthy is the comparison of Internet users and non-users in how frequently they attend sporting/live entertainment and performing arts/cultural events. Not only do Internet users exhibit a greater tendency to use all media, they also engage more frequently in entertainment activities outside their home.

While it will be seen later (in Tables 6-3 and 6-4) that Internet non-users spend more time consuming television, radio and newspapers as measured in hours per week than do users, it is also the case that a higher percentage of Internet users than non-users devote at least some of their time to most media, except television and newspapers.

6.6 Time Spent Using Traditional Media: Analysis of Proportional Differences

Table 6-2 provides a breakdown of the media diet of all Canadians, reported in average hours per week and in percentages, representing the relationship of individual media use to overall time spent across all media in a typical week.

Table 6-2 Proportion of time spent using traditional media

Media Use or Activity	Relative Time Spent on Media and Activities	
	All respondents	Proportion of total time spent
	hours/week	%
Television	10.4	23
Radio	8.5	19
Music: CDs, albums, tapes, MP3s	5.8	13
Books	5.3	12
Traditional telephone	3.6	8
Movies/television pre-recorded at home	3.2	7
Newspapers	2.6	6
Magazines	1.6	4
Cell phone	1.5	3
Attending sporting/live entertainment events	.95	2
Video games not on the Internet	.85	2
Movies in theatres	.64	1
Attending performing arts/cultural events	.60	1
Total Traditional Media Use	**45.5**	**100**

CIP 2007 — C2.030RT–042TT (All respondents, 12 years +, n=2633)

Notes:
- This index considers the total population of our survey including those who reported no use of an individual medium.
- A listwise deletion procedure was employed.
- This index also provides a proportional ranking of individual media compared to overall media consumption.
- Totals may not add to 100% due to rounding.

As can be seen, television and radio predominate, comprising 23% and 19% respectively of the average Canadian's traditional media diet in terms of time spent. With respect to overall media consumption, Canadians spend 19 of 46 hours watching and listening to these two media. Overall, Canadians also spend considerable time listening to music through various devices, reading books and talking on landline telephones. Proportionally, the least amount of time spent

is on attending entertainment outside the home. The low level of video gaming is accounted for by the fact that only younger Canadians spend much time on it.

Table 6-3 provides a breakdown of traditional media use comparing Internet users with non-users. Once again, this table examines the number of hours in a week spent using a particular medium as a percentage of the total media diet. The sub-samples compared represent all Internet users and non-users respectively. Time measures are relative to overall consumption for each subgroup and include those who reported not having spent any time using a particular medium.
Surprisingly, there is no difference between Internet users and non-users in total consumption of traditional media, supporting the hypothesis that Internet use is not replacing use of other media, though, as will be seen later, it is modifying traditional media usage.

It should be noted that there are important demographic differences between Internet users and non-users, differences that in themselves influence media use. For example, non-users tend to be older than do users, and older Canadians spend more time than average with traditional media. However, controlling for age does not alter the differences between users and non-users in any substantial way.

When the time spent online by Internet users is included, media use increases to 62 hours per week. The Internet is the number one medium for Internet users in terms of hours spent, at 17 hours per week.

Television is the predominant medium for non-users. Internet non-users spend almost four hours more watching television compared to Internet users. This represents almost one-third (29%) of the non-users' media diet, whereas it represents only one-fifth (21%) of the Internet user's total traditional media consumption. When Internet use is included in this index, television represents only 16% of media consumption for Internet users, compared to 27% of time spent online. It is important to note that time spent online at home, where the Internet competes most directly with television for attention, is less than 11 hours per week, suggesting that television and the Internet consume approximately equal amounts of time at home for users. Time spent across other conventional media is greater for Internet users than for non-users. The end result is very similar levels of total traditional media consumption for users and non-users (45 and 46 hours per week respectively).

While the former clearly indicates a lack of displacement of traditional media as a result of engaging on Internet, the latter finding demonstrates that television viewing is being supplanted somewhat by the Internet. For Internet users, other components of their media diet have increased along with the additional time they are now spending attending to online activities and services.

The study's findings indicate that Internet users spend more time than do non-users watching movies, both pre-recorded at home and at theatres, playing video games not online and listening to music across a variety of devices. They also spend more time than do non-users talking on both wired and cell phones, and significantly more time attending live events outside the home such as sporting events, concerts and so on.

Internet non-users devote more time to television, radio and newspapers than do their Internet-user counterparts. They watch 36% more television, listen to 25% more radio and spend 20% more time with newspapers than Internet users do.

Table 6-3 Proportion of time spent using traditional media: Internet users and non-users

Media Use or Activity	Relative Time Spent on Media and Activities				
	Internet users	Proportion of time spent (including Internet)		Internet non-users	Proportion of time spent
	hours/week	%		hours/week	%
Television	9.7	21	(16)	**13.2**	29
Radio	8.1	18	(13)	**10.1**	22
Music: CDs, albums, tapes, MP3s	6.3	14	(10)	4.1	9
Books **ns*	5.3	12	(9)	5.3	12
Traditional telephone **ns*	3.6	8	(6)	3.6	8
Movies/television pre-recorded at home	**3.4**	8	(5)	2.4	5
Newspapers	2.5	6	(4)	**3.0**	7
Magazines **ns*	1.5	3	(2)	1.7	4
Cell phone	**1.7**	4	(3)	.71	2
Attending sporting/ live entertainment events	**1.0**	2	(2)	.61	1
Video games not on the Internet	**.96**	2	(1)	.42	1
Movies in theatres	**.71**	1	(1)	.39	1
Attending performing arts/ cultural events	**.64**	1	(1)	.44	1
Total Media Use (Traditional)	**45.3**	**100**	**(73)**	**46.0**	**100**
Internet Use	**17.0**		**(27)**		
Overall Media Use (Traditional and Internet)	**62.3**		**(100)**		

CIP 2007 — C2.030RT–042TT (All respondents, 12 years +, n=2633)

Notes:

- Percentages in parentheses indicate proportion of overall media use including time online for Internet users.
- This index considers the total population of the survey including those who reported no use of an individual medium.
- A listwise deletion procedure was employed. This index also provides a proportional ranking of individual media compared to overall media consumption.
- Totals may not add to 100% due to rounding.
- Highest consumption levels between Internet users and non-users are indicated in bold where differences are statistically significant.

Compared to non-users, Internet users, aside from spending an average of 17 hours per week online, spend 40% more media time watching pre-recorded movies, 80% more time going to the movies, twice as much time playing video games, and 50% more time listening to music. In general, Internet users tend to use conventional media that is consistent with their demographic profiles and penchant for technology.

The only traditional medium that shows significant loss of overall time as a result of Internet use is television, as Internet users increasingly access moving images online from a wide range of non-traditional sources, ranging from Facebook to newspaper websites.

6.7 Time Spent Using Traditional Media: Analysis of Individual Media Consumption

The following table summarizes the average hours spent per week for declared users of specific media. That is, these measures reflect the average traditional media use only for those engaged with each media; the findings do not include responses of zero. Therefore, the results render a reasonably accurate measure of individual media consumption.

Table 6-4 Time spent using traditional media by declared users of each medium: Internet users and non-users

Media Use or Activity	Specific Time Spent on Individual Media		
	All respondents	Internet users	Internet non-users
	hours/week	hours/week	hours/week
Television	11.0	10.2	**14.0**
Radio	9.9	9.3	**12.5**
Music: CDs, albums, tapes, MP3s	7.0	**7.2**	5.8
Books	6.6	6.3	**7.7**
Movies/television pre-recorded at home **ns*	4.4	4.3	4.8
Traditional telephone **ns*	3.7	3.7	3.8
Video games not on the Internet **ns*	3.5	3.5	4.2
Newspapers	3.4	3.2	**4.1**
Cell phone **ns*	2.5	2.6	2.0
Attending sporting/live entertainment events **ns*	2.5	2.5	2.4
Magazines	2.3	2.2	**3.0**
Movies in theatres	1.8	1.8	**2.2**
Attending performing arts/cultural events **ns*	1.8	1.7	2.0

CIP 2007 — C2.030SS–042SS (All respondents, 12 years +, n=3037)

Notes:
- Differences not statistically significant at the .01 level are indicated by *ns.
- The highest consumption levels between Internet users and non-users are indicated in bold where differences are statistically significant.
- This table differs from Tables 6-2 and 6-3 as it includes only declared users of particular media. Those that did not use a particular media platform were not included in the calculation of means.

Consistent with the results shown in the previous table, Internet non-users spend significantly more time watching television and listening to radio than do Internet users. They also spend more time with books, newspapers and magazines than do Internet users. While the number of visits to local movie theatres is greater for Internet users, non-users report spending more time viewing

movies at theatres. Those online spend more time than do non-users listening to music across a variety of platforms.

It appears that, although Internet users are by no means abandoning traditional media, they are shifting some of their time to online activities.

Overall, the results from this index appear to indicate that Canadian Internet users are finding both substitute and additional sources for information and entertainment online. One example of this is that those who are online, compared to those who are not, apparently listen to less radio but spend more time listening to music. While radio listening is still robust both online and offline, these data indicate a shift from conventional radio to other sources of music.

6.8 Traditional Media Use Across Demographic Categories

When considering the amount of time that various traditional media are used across demographic categories, our findings identify a number of important differences in consumption.

6.8.1 Language

As Figure 6-2 illustrates, for all traditional media, Anglophones are more frequent users than are Francophones. The widest gaps in adoption levels between Anglophones and Francophones are found in movie viewing at home (18% gap), cell phone usage (17%), reading magazines (15%) and reading books (14%). Overall, Anglophones spend considerably more time than do Francophones consuming traditional media: 47 compared to 39 hours per week.

6.8.2 Region

Not surprisingly, results for Quebec are similar to those for Francophones in general, since the study oversampled French-speakers in Quebec to ensure better French–English comparisons.

Quebec appears to lead the nation in watching movies, but engages in less television viewing than other regions in Canada. Atlantic provinces lead in music consumption, but lag in reading newspapers and using cell phones. Alberta has more of its population spend time at sporting/live entertainment and performing arts/cultural events than do other regions. British Columbians spend more time than do other Canadians reading books. Inhabitants in the Prairie provinces listen to more radio than do those in other regions. Those who reside in the Prairie provinces and Ontario watch more television than do residents elsewhere in Canada.

6.8.3 Gender

A few significant observations appeared when considering traditional media use and gender.

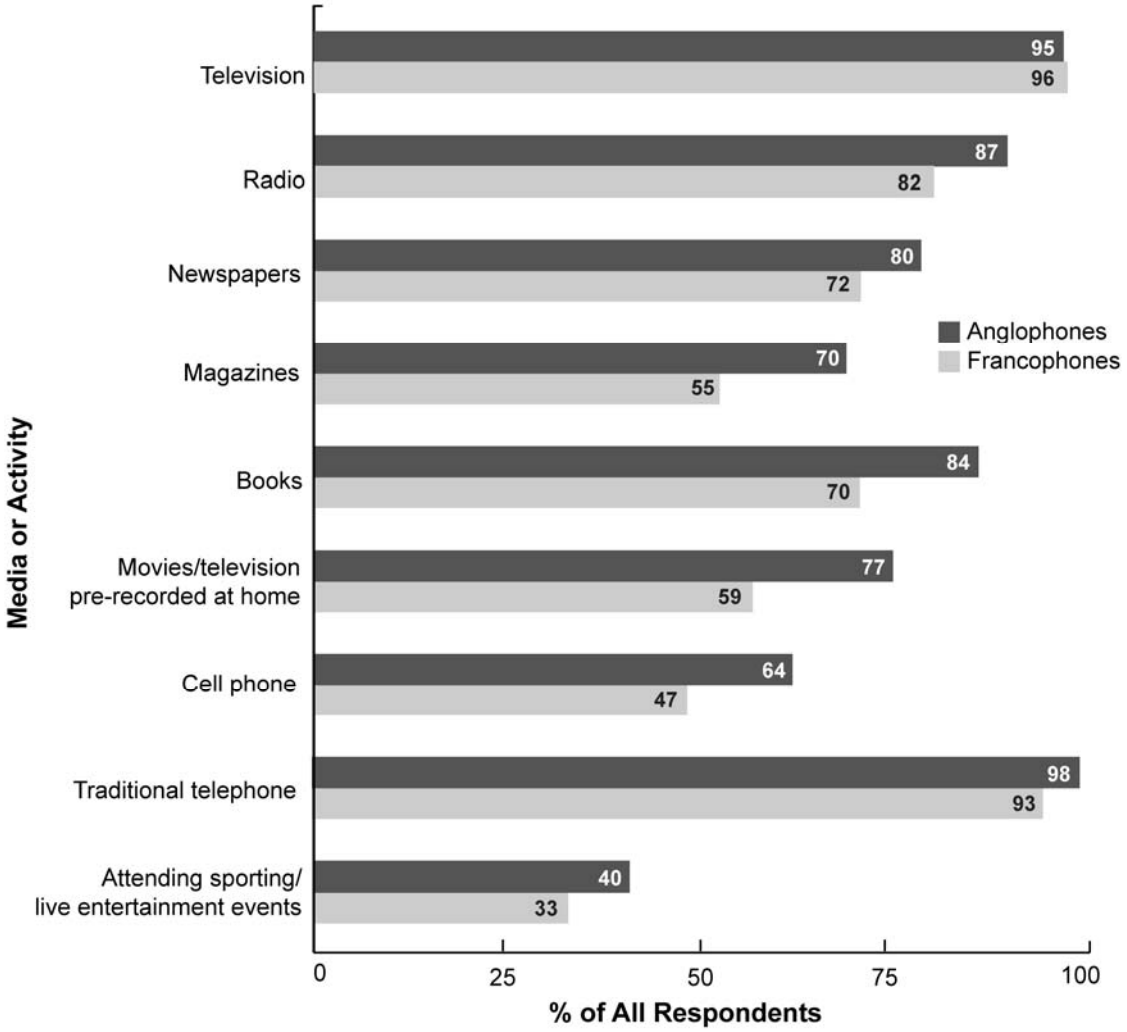
Women spend more time than men

- reading magazines
- reading books
- talking on wired phones
- attending live entertainment and sporting events.

Men spend more time than women

- watching pre-recorded movies and television at home
- watching movies in theatres
- playing video games.

Figure 6-2 Frequency of access to traditional media across language groups



CIP 2007 — C2.030F–042F (All respondents, 12 years +, n=3037)

6.8.4 Income and Education

Household income and education level are related to traditional media use:

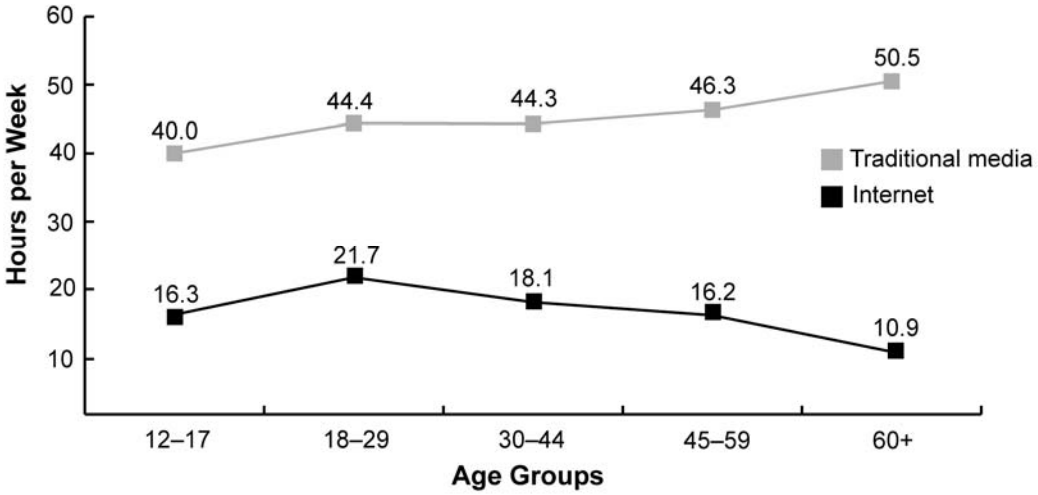
- People from households in the highest income quartile watch more movies in theatres than do those in other income groups
- Using cell phones and attending sporting and performing events are positively related to income levels (the greater an individual's income, the greater her/his consumption)
- Time spent with books rises with formal education level

6.9 Traditional Media Use Across Age Groups

As Figure 6-3 presents, overall use of traditional media is closely related to age. The older an individual is, the more time she/he spends using conventional media. By contrast, as was presented in Chapter 3, the opposite relationship is apparent for Internet use. In general, the

younger the person is, the more time she/he spends online. While this holds fairly true for most age groups, level of engagement on the Internet for the youth subgroup is actually slightly less than the adult average (16.3 hours versus 17.1 hours per week). The heaviest Internet use (21.6 hours per week) is found among young adults — those 18–29 years old. While the use of the Internet in the workplace is clearly a factor here, it may also be that young adults are more engaged and committed to using it than are other groups, given they were the first generation with abundant access.

Figure 6-3 Time spent using traditional media and the Internet across age groups



CIP 2007 — C2.042TR–083TT, C2.261a (All respondents/Internet user respondents, 12 years +, n=2633/2144)

According to our traditional media index, youth spend a total of 40 hours per week consuming conventional media while adults spend an average of 46 hours, or 15% more than youth. The average range of time spent using traditional media across all other age groups is from 44 hours per week for those aged 18–29 and 30– 44, to 51 hours per week for those aged 60 and older. The oldest Canadians spend more time with traditional media than average and, therefore, are more reliant on these media for all their information and entertainment than are those younger.

Not surprisingly, this analysis supports the proposition that Canadians tend to be most committed to the media they grew up with. Older respondents continue to spend time with traditional media, while younger Canadians are more open to emerging new media and technologies. If this pattern persists, what is currently considered new media will in the future be conventional media, as younger Canadians age and move into adult life stages.

6.9.1 Differences in Traditional Media Use among Youth, Young Adults and Adults

Table 6-5 provides a comparison of penetration rates across traditional media among youth (12–17 years), young adults (18–29 years) and the entire adult sub-sample (18 years and older).

In terms of time spent, television viewing and use of wired telephones are relatively the same for all three age subgroups. However, many more adults than youth spend time listening to radio and reading newspapers. Young adults also spend less time listening to radio than do the other two groups.

Table 6-5 Frequency of access to traditional media: Youth, young adults and adults

Media Use or Activity	Respondent Subgroups		
	Youth (12–17)	Young adults (18–29)	Adults (18 years +)
	%	%	%
Traditional telephone **ns*	93	96	97
Television **ns*	97	92	95
Radio	74	79	87
Music: CDs, albums, tapes, MP3s	**98**	93	82
Books	**88**	77	80
Newspapers	59	70	**80**
Movies/television pre-recorded at home	**92**	84	71
Magazines **ns*	62	57	68
Cell phone	46	**69**	62
Attending sporting/live entertainment events	**47**	**47**	37
Movies in theatres	**64**	51	32
Attending performing arts/cultural events	**43**	36	33
Video games not on the Internet	**73**	43	19

CIP 2007 — C2.030F–042F (All respondents, 12 years +, n: Youth=285, Young adults=527, Adults=2750)

Notes:
- Differences not statistically significant at the .01 level are indicated by *ns.
- The highest frequencies across age groups are indicated in bold where differences are statistically significant.

Youth have higher than average adoption levels for reading books, viewing pre-recorded media at home, going to movies at theatres and playing video games not on the Internet. They also attend sporting/live entertainment and performing arts/cultural events more often than do adults. Young adults, however, are even more likely than youth to attend these events.

Watching movies, playing video games and listening to music are almost defining activities for those less than 30 years of age. For some of these activities, youth are the most active, while for others it is younger adults. Proportionately, there are nearly four times as many gamers under 30 years of age than over this age. At 73%, youth are the heaviest game players of the three age categories. Cell phone usage is greater for adults than for youth, reflecting issues of access, parental control and work-related usage.

Noteworthy is the highest level of adoption of cell phones by those 18–29 years (69%). Along with the Internet, mobile communication and content have the most pronounced influence on young Canadians in general.

Table 6-6 provides a breakdown of the proportion of time spent across selected traditional media for youth, young adult and adult respondents. The measures provided are part of the overall index of traditional media consumption and together total 100%.

Table 6-6 **Proportion of time spent with traditional media: Youth, young adults and adults**

Proportion of Total Time Spent	Media or Activity				
	Television	Radio	Newspapers	Magazines	Books
	%	%	%	%	%
Youth (12–17)	20	7	2	3	10
Younger adults (18–29)	17	15	4	2	10
Adults (18+)	23	20	6	3	12

Proportion of Total Time Spent	Movies/TV pre-recorded at home	Movies in theatre	Video games not on the Internet	Music: CDs, tapes, albums, MP3s
	%	%	%	%
Youth (12–17)	10	4	8	23
Younger adults (18–29)	10	2	4	17
Adults (18+)	7	1	1	12

Proportion of Total Time Spent	Cell phone	Traditional phone	Attending sporting/live entertainment events	Attending performing arts/cultural events
	%	%	%	%
Youth (12–17)	2	7	4	2
Younger adults (18–29)	6	8	3	2
Adults (18+)	3	8	2	1

CIP 2007 — C2.042TR, C2.261a (All respondents, 12 years +, n=2633)

Some interesting differences emerged in the comparisons of time spent with various media:

- Listening to radio is adults' second most frequent media activity (20%), next to watching television (23%)
- Youth watch television practically the same proportion of time as do adults (20%), while listening to radio constitutes only 7% of their overall media time
- Listening to music from a variety of devices (CDs, tapes, vinyl albums or MP3s) consumes the highest proportion of media time for the youth sample (23%), while it represents only 12% of adults' traditional media diet
- The 18–29 age group spends about the same amount of time listening to music as watching television (each 17% of media time).

Table 6-7 compares youth, young adults and adults in terms of actual time spent across selected traditional media, including in the calculations only those who use that specific medium.

Table 6-7 Time spent using traditional media by declared users of each medium: Youth, young adults and adults

Media Use or Activity	Respondent Subgroups		
	Youth (12–17)	Young adults (18–29)	Adults (18 years +)
	hours/week	hours/week	hours/week
Television	7.6	8.4	**11.3**
Radio	3.8	8.9	**11.0**
Newspapers	1.2	2.5	**3.6**
Magazines **ns*	1.7	2.0	2.4
Books	4.4	6.1	**6.8**
Movies/television pre-recorded at home **ns*	5.4	5.1	4.4
Movies in theatres	**2.2**	2.0	1.8
Video games not on the Internet	**4.3**	4.0	3.2
Music: CDs, tapes, albums, MP3s	**9.9**	8.3	6.6
Cell phone **ns*	2.3	3.6	2.5
Traditional telephone	2.6	**3.9**	3.8
Attending sporting/live entertainment events	**3.0**	2.6	2.4
Attending cultural/performing arts events **ns*	2.0	2.0	1.7

CIP 2007 — C2.030F–042F (All respondents, 12 years +, n: Youth=237, Young adults=481, Adults=2396)

Notes:
- Differences not statistically significant at the .01 level are indicated by *ns.
- The highest consumption levels across age groups are indicated in bold where differences are statistically significant.

The line distinguishing new and old media consumers appears to fade at age 30. Adults over 30 years of age spend more time than do youth and young adults with the staple of traditional media: television, radio, newspapers and books. What is most surprising is that adults spend three times as much time listening to radio and 49% more time watching television than do youth, when the sample includes only those who reported accessing these media. Recall that the findings reported here, compared to the earlier analysis in this chapter, include only those individuals who reported using the selected medium as opposed to the sample of all Internet users; this is why results differ. The 18–29 year group falls in the middle but, for time spent with most media, is closer to youth than to adults. This appears to indicate that, as an individual grows older, her/his consumption of traditional media also grows. Internet usage simultaneously increases as well, but not at the cost of conventional media engagement.

A great deal of the conventional media diet for youth is replaced by listening to music from other devices, playing video games and going to see movies at theatres.

It remains to be seen whether higher levels of consumption of traditional media in the 18–29 age group are a result of a transition into adulthood or a remnant of older media use patterns. This analysis suggests that both factors are at work. As the current youth cohort ages, it appears to make increasing use of conventional media such as radio and newspapers. On the other hand,

this group is heavily invested in online applications and mobile devices and is likely to continue to rely on them as well. What is likely to emerge is not only a new balance among media but a more diverse multimedia and multiplatform media consumption pattern.

This certainly is borne out in examining the behaviour of those aged 18–29 (see Figure 6-3). Compared to youth, young adults exhibit gradual increases in time spent both with the Internet and with traditional media. Young adults spend more time on the Internet (22 hours/week) and attending to traditional media (44 hours/week) than do youth and adults in general. Of young adults' media time, 46% is spent with the four most prominent conventional media. This represents 43 hours of their traditional media diet in a week.

While certainly overall levels of traditional media consumption by youth are less than those of adults, it is still very significant that more than one-third of youth's traditional media diet (39%) is made up of this staple of four traditional media representing 17 hours of their weekly consumption of non-Internet activity. This is slightly greater than the amount of time they spend on the Internet.

Given these results, it does not appear that either youth or young adults are pulling away from conventional mass media. Instead, there is evidence that as youth age their use of traditional media will increase. They will most likely maintain a similar balance of overall media behaviour, rather than displace one medium with another.

CIP believes that, for youth, this media behaviour is by choice. Youth as well as young adults appear to have sought out a new balance in their media diet and have consciously augmented traditional media use with the Internet. Being online provides them with the option of engaging with a myriad of new sources of entertainment and information, choosing new forms of delivery for traditional media, or staying with conventional forms of delivery. Canadian youth are not rejecting traditional media but rather adding new things to their media menu and consuming old media in new ways.

6.9.2 Music Consumption by Youth (12–17 years)

As has been seen, youth spend nearly nine hours in a typical week listening to music. They use both physical media (CDs, tapes and vinyl albums) and digital media (MP3 or digital file format) in almost equal proportions (86% and 81% respectively). Most of those surveyed use both. Combining the two measures, 97% of the youth subgroup reported accessing music through either avenue. In comparison, those 18 years and older spend an average of seven hours per week listening to music across all devices. For youth, music listening trails only time online and watching television in terms of their overall media diet.

6.10 Traditional Media Use by Heavy Internet Users

It would be assumed that heavy Internet users — defined in this study as those who spend 15 or more hours in an average week online — have reduced many of their traditional media habits to make time for higher levels of Internet use. In Table 6-8 below, heavy Internet users are compared with moderate Internet users (five to less than 15 hours per week) and those who use the Internet the least amount of time (less than five hours per week).

While heavy Internet users tend to use less of a few specific media (television and newspapers, for example), for most other media the opposite appears to be the case. In fact, heavy Internet consumers use traditional media more frequently and for longer periods of time than do light Internet users. This further corroborates the viewpoint that Internet use tends to supplement rather than displace traditional media. It also supports this study's contention that media use begets more media use. Those with a greater propensity for media overall will simply use more media, be it online or through conventional means.

Table 6-8 Traditional media use across Internet user categories

Percentage of Internet Users	Media or Activity				
	Television	Radio	Newspapers	Magazines	Books
	%	%	%	%	%
Light users (<5 hours)	97	89	83	69	78
Moderate users (5–<15 hours)	96	88	77	69	86
Heavy users (15 hours +)	94	86	75	71	87

Percentage of Internet Users	Movies/TV pre-recorded at home	Movies in theatre	Video games not on the Internet	Music: CDs, tapes, albums, MP3s
	%	%	%	%
Light users (<5 hours)	73	32	21	83
Moderate users (5–<15 hours)	79	36	27	87
Heavy users (15 hours +)	84	46	32	91

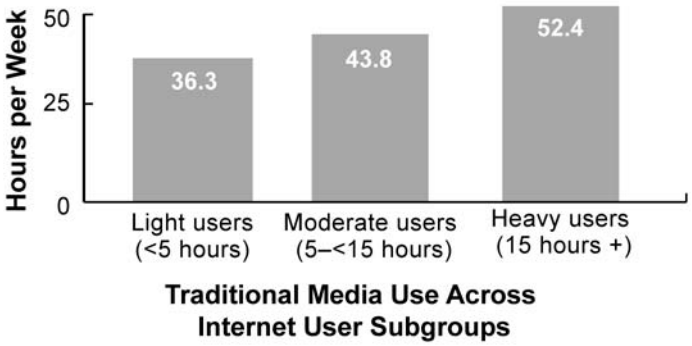
Percentage of Internet Users	Cell phone	Traditional phone	Attending sporting/live entertainment events	Attending performing arts/cultural events
	%	%	%	%
Light users (<5 hours)	61	98	38	35
Moderate users (5–<15 hours)	65	97	39	38
Heavy users (15 hours +)	74	98	46	39

CIP 2007 — C2.030F–C2.042F (Internet user respondents, 12 years +, n=2374)

Compared to lighter users, heavy Internet users

- are, together with moderate users, more likely to read books
- consume more pre-recorded movies
- listen to music more often and are much more likely to use cell phones
- are more likely to attend sporting and live entertainment events and movies in theatres.

Figure 6-4 **Time spent on traditional media across Internet usage categories**



CIP 2007 — C2.042TR (Internet user respondents, 12 years +, n=2374)

6.11 Trends: 2004 to 2007

Similar to the preceding analysis of the 2007 media index, Table 6-9 shows the proportion of the adult population that uses each traditional media. Note that comparisons in the trends analysis are based on the sample of adults (18 years and older in each case), since youth were not interviewed in 2004. This will result in some differences from the study's earlier analysis, especially in cases where the youth sample demonstrated markedly different media use patterns from adults. In general, however, the differences in specific numbers would not alter the study's conclusions.

Usage patterns for offline media did not change much between 2004 and 2007. Book reading decreased slightly, while cell phone use increased. The increase in cell phone consumption reflects the appeal of new products, relatively diminishing costs and a growing desire to possess mobile devices. Internet users are more likely than non-users to use cell phones.

The decline in the proportion of Canadians that read books is not great, but it may reflect a trend to access content online that formerly could be found only in books. There are similar indications for newspapers and television.

Trends in media use from 2004 to 2007 among Internet users and non-users, shown in Table 6-10, reveal few differences. Cell phone use has increased more among Internet users than non-users, though penetration levels have risen in both groups. Other changes, like decreased music listening, are common to both groups. It is important to recall that this analysis does not include those aged 12–17, who, as previously stated, spend a substantial amount of their time listening to music. Most differences between groups are not statistically significant.

Among all respondents, time spent with traditional media has declined measurably since 2004, as shown in Table 6-11. Total time spent using conventional media has declined approximately five hours, or 13%, from 50 hours per week in 2004 to 45 hours per week in 2007.

Television viewing, as a proportion of the offline media diet, has remained constant since 2004, at a little less than one-quarter of media time. Music listening has decreased among adults from a share of 17% to 12%. Given the absence of the youth sample in this analysis, it cannot be said whether overall consumption has dropped.

Table 6-9 Proportion of adult population that accesses traditional media: 2004 to 2007[8]

Media Use or Activity	Percentage from Respondents		
	2004	2007	+ / -
	%	%	
Traditional telephone	97	98	+1
Television	95	92	-3
Newspapers and magazines	89	88	-1
Radio	87	86	-1
Music: CDs, albums, tapes, MP3s	82	85	+3
Books	80	85	+5
Movies/television pre-recorded at home	71	70	-1
Cell phone	53	62	+9
Movies in theatres	32	29	-3
Video games not on the Internet	19	20	+1

CIP 2004 — C1.B010F–019F (n=3014); CIP 2007 — C2.030F–040F (All respondents, 18 years +, n=2750)

Table 6-10 Proportion of Internet users and non-users that accesses traditional media: 2004 to 2007

Media Use or Activity	Respondent Subgroups			
	2004		2007	
	Internet users	Internet non-users	Internet users	Internet non-users
	%	%	%	%
Television	96	97	95	95
Radio	88	80	89	80
Newspapers and magazines	89	85	90	86
Books	89	74	83	68
Movies/television pre-recorded at home	76	54	78	48
Movies in theatres	34	16	36	17
Video games not on the Internet	24	10	23	8

[8] Samples used for comparison between 2004 and 2007 are of Canadians 18 years and older. Some discrepancies may therefore exist between previously presented results from 2007, which include a youth sub-sample (12–17-year-olds). In 2004, a youth sub-sample was not surveyed.

Media Use or Activity	Respondent Subgroups			
	2004		2007	
	Internet users	Internet non-users	Internet users	Internet non-users
	%	%	%	%
Music: CDs, albums, tapes, MP3s	90	71	86	67
Cell phone	61	31	70	34
Traditional telephone	99	96	98	94

CIP 2004 — C1.B010F–019F (n=3014); CIP 2007 — C2.030F–040F (All respondents, 18 years +, n=2750)

Table 6-11 Proportion of time spent using traditional media by all adult respondents: 2004 to 2007

Media Use or Activity	Relative Time Spent on Media and Activities			
	2004		2007	
	All respondents	Proportion of time spent	All respondents	Proportion of time spent
	hours/week	%	hours/week	%
Television	12.1	24	10.7	24
Radio	9.3	18	9.0	20
Newspapers and magazines	4.0	8	4.4	10
Books	6.7	13	5.5	12
Movies/television pre-recorded at home	2.4	5	3.2	7
Movies in theatres	.50	1	.56	1
Video games not on the Internet	.79	2	.62	1
Music: CDs, albums, tapes, MP3s	8.6	17	5.5	12
Cell phone	1.6	3	1.6	4
Traditional telephone	4.4	9	3.7	8
Total Media Use	**50.4**	**100**	**44.6**	**100**

CIP 2004 — C1.B010F–019F (n=3014); CIP 2007 — C2.030F–040F (All respondents, 18 years +, n=2750)

Notes:
- This index considers the total population of the survey including those who reported no use of an individual medium.
- A listwise deletion procedure was employed.
- This index also provides a proportional ranking of individual media compared to overall media consumption.
- Totals may not add to 100% due to rounding.

In general, total consumption of traditional media has declined by 10% for both Internet users and non-users (Table 6-12). Since levels of engagement have decreased for both groups, it cannot be assumed that the Internet has replaced other media.

Internet users continue to spend significantly less time each week watching television than do non-users. In 2007, television viewing represents 22% of the media diet for Internet users compared to 29% of the media diet for non-users. This gap is the same as that found in 2004. Television viewing is maintaining its share of media attention across both subgroups and remains at consistent levels for those 18 years and older.

Listening to music across all devices has decreased significantly since 2004 for both Internet users and non-users. However, the gap between Internet users and non-users has remained the same. Music consumption in general has declined by approximately 3.5 hours or 35%.

Both Internet users and non-users spent less time reading books in 2007 than they did in 2004. In 2007 both also spent more time at home watching pre-recorded movies delivered via DVDs, VCRs, and other means than they did in 2004. The gap in cell phone use remains the same as in 2004.

As discussed in Chapter 3, the most dramatic increase of media time between 2004 and 2007 is time spent online by Internet users. The proportion of time spent using the Internet now represents 28% of the Internet user's media diet, an increase of seven points from 2004.

Finally, Table 6-13 provides a comparison of 2004 to 2007 in terms of time spent consuming various traditional media by individual media users. This analysis includes only those users who reported their consumption activity to be greater than zero hours in an average week for each medium in the index.

Overall, consumption of television and radio for all Canadians has decreased — from 12.5 hours per week in 2004 to 11.3 hours per week in 2007. On a weekly basis, Internet users continue to watch four more hours of television and listen to three more hours of radio than do non-users. While overall levels have decreased, the fact that the decrease is consistent for both Internet users and non-users amidst increased penetration and engagement online appears to corroborate the study's conclusion that media attention is not governed completely by a displacement effect.

Both newspaper and magazine readership has increased. The relationship between Internet users and non-users has remained consistent with non-users spending more time reading newspapers and magazines than do Internet users.

For all respondents, time spent reading books has declined by approximately one hour in an average week. Non-users tend to read more books than do Internet users. The gap between the two groups increased in 2007; as compared to 2004, the difference is now statistically significant.

Overall, movie viewing at home increased from 2004 to 2007, though the gap between Internet users and non-users has decreased.

Table 6-12 Proportion of time spent using traditional media by Internet users and non-users: 2004 to 2007

Media Use or Activity	Relative Time Spent on Media and Activities									
	2004					2007				
	Internet users	% of time spent (including Internet)		Internet non-users	% of time spent	Internet users	% of time spent (including Internet)		Internet non-users	% of time spent
	hours/week	%		hours/week	%	hours/week	%		hours/week	%
Television	11.2	22	(18)	14.7	28	9.9	22	(16)	13.3	29
Radio **ns*	8.9	18	(14)	10.5	20	8.7	20	(14)	10.2	23
Newspapers and magazines **ns (2007 only)*	3.8	8	(6)	4.6	9	4.3	10	(7)	4.9	11
Books **ns (2007 only)*	6.8	14	(11)	6.3	12	5.5	12	(9)	5.5	12
Movies/television pre-recorded at home	2.5	5	(4)	2.1	4	3.4	6	(6)	2.7	6
Movies in theatres	.57	1	(1)	.29	1	.61	1	(1)	.38	1
Video games not on the Internet	.90	2	(1)	.48	1	.70	2	(1)	.34	1
Music: CDs/albums/tapes/MP3s	9.0	18	(14)	7.3	14	5.9	13	(10)	4.1	9
Cell phone	1.9	4	(3)	.78	2	1.8	4	(3)	.70	2
Wired telephone **ns*	4.3	9	(7)	4.6	9	3.7	8	(6)	3.6	8
Total Media Use (Traditional) **ns*	**50.0**	**100**	**(79)**	**51.7**	**100**	**44.4**	**100**	**(72)**	**45.2**	**100**
Internet Use	**13.2**		**(21)**			**17.0**		**(28)**		
Overall Media Use (Traditional and Internet)	**63.2**		**(100)**			**61.4**		**(100)**		

CIP 2004 — C1.010–019TT (n=2725); CIP 2007 — C2.030RH–040TT (All respondents, 18 years +, n=2458)

Notes:
- Percentages in parentheses indicate proportion of overall media use including time online for Internet users.
- This index considers the total population of the survey including those who reported no use of an individual medium.
- A listwise deletion procedure was employed. This index also provides a proportional ranking of individual media compared to overall media consumption.
- This index also provides a proportional ranking of individual media compared to overall media consumption.
- Totals may not add to 100% due to rounding.

Table 6-13 Time spent using traditional media by individual media users: 2004 to 2007

Media Use or Activity	Specific Time Spent on Individual Media and Activities					
	2004			2007		
	All respondents	Internet users	Internet non-users	All respondents	Internet users	Internet non-users
	hours/week	hrs/week	hours/wk	hours/week	hours/wk	hrs/week
Television	12.6	11.6	15.0	11.3	10.5	14.2
Radio	11.2	10.4	13.3	10.4	9.8	12.6
Newspapers and magazines	4.6	4.3	5.4	5.0	4.8	5.8
Books	7.9	7.7	8.6	6.8	6.6	7.8
		*ns	*ns			
Movies/television pre-recorded at home	1.7	1.7	1.9	4.4	4.3	4.9
		*ns	*ns		*ns	*ns
Movies in theatres	3.5	3.4	3.9	1.8	1.7	2.2
Video games not on the Internet	3.9	3.8	4.8	3.2	3.2	3.8
		*ns	*ns		*ns	*ns
Music: CDs, albums, tapes, MP3s	10.1	10.1	10.1	6.6	6.8	5.8
		*ns	*ns		*ns	*ns
Cell phone	3.0	3.1	2.6	2.5	2.6	2.0
		*ns	*ns		*ns	*ns
Traditional telephone	4.5	4.4	4.8	3.8	3.9	3.8
		*ns	*ns		*ns	*ns

CIP 2004 — C1.010SS–019SS (All respondents, 18 years +, n=3014);
CIP 2007 — C2.030SS–040SS (All respondents, 18 years +, n=2750)

Note:
- This table differs from Tables 6-11 and 6-12 as it includes only declared users of particular media. Those that did not use a particular media platform were not included in the calculation of means.

6.12 Conclusions

Canadians continue to spend a great deal of time consuming traditional media. There is almost no difference between Internet users and non-users in the overall number of hours spent using conventional media. Any differences between Internet users and non-users are found in the time spent across specific individual media and the gaps have remained fairly consistent from 2004 to 2007.

Overall, traditional media use has declined approximately 13% or 5 hours per week since 2004. The decrease in time spent is consistent for both Internet user and non-user subgroups. Internet users appear to spend the time they might have previously devoted to watching television to

instead viewing pre-recorded media, listening to music and talking on cell phones. More likely than media displacement or replacement is a complex pastiche of simultaneous use or multi-tasking across various media and delivery platforms, with an additional 17 hours of media engagement spent online by Internet users as compared to non-users (about 11 hours of which are at home).

Internet users use more media, and spend more time using all media, than do non-users. Because Internet users, especially heavy Internet users, are likely to use all media, traditional media are not being replaced by online activities. Instead, the use of new media tends to supplement the use of old media.

Combining the trend analysis with an examination of the relationship between age and media use, it can be concluded that new media are likely being added to an existing media menu for youth and are part of a gradual process of adjustment for young adults. The four predominant traditional media — television, radio, newspapers and books — still represent more than one-third of the traditional media diet for youth.

7 Attitudes toward Technology and the Media

7.1 Key Findings

- A majority of Canadians, including both Internet users and non-users, are comfortable with new technologies
- Compared to others, younger, more experienced and heavier Internet users are most likely to express comfort with innovation
- A smaller group, representing 5% of Canadians, is the most excited about innovation and is more likely to be early adopters; these individuals tend to be male and engaged with the Internet to a high degree
- Adults are concerned about both the security of e-mail and the safe use of the Internet by children
- A moderate level of concern about the security of financial information online and the reliability of Internet information reflects an ongoing scepticism by Canadians toward the Internet, even among users
- Heavier and more experienced Internet users are somewhat more confident about online security and information than are other users
- Overall, Canadians feel that interpersonal contacts and the Internet are the most important sources for information, while interpersonal contacts and television are the most important sources for entertainment
- Newspapers are considered the most reliable source of information, even by those who are comfortable online
- Television is considered the most popular media source used for entertainment
- Most Canadians — Internet users and non-users alike — feel that interpersonal sources are more important for information and entertainment than are various media sources
- Of all Canadians, 66% regard interpersonal sources as important for information while 76% regard interpersonal sources as important for entertainment
- Among youth (those aged 12–17), seven in ten regard the Internet as important for both information and entertainment
- From 2004 to 2007, an increasing number of Canadians, particularly heavy and more experienced users who have access to high-speed broadband, came to regard the Internet as almost as important for entertainment as for information
- Measures of perceived comfort with the Internet and reliability of information found on the Internet have remained fairly consistent from 2004 to 2007

7.2 Attitudes Toward Technology

There appears to be a “rising tide” of technological devices in the lives of Canadians evidenced by increasing levels of access to hardware, software and telecommunications connections integral to ICTs. As reported in Chapter 5, penetration rates of computers and other digital devices in the household are relatively high in Canada.

However, the data suggest that there may be a digital divide among Canadians based on attitudes toward technology and media. With a preponderance of ICTs present in most households, current digital divides may be related to users’ level of confidence, skills needed to use ICTs and level of openness related to technological readiness and adaptability. Those with less access to technology than the average Canadian are often concerned about whether they possess the necessary skills and confidence to cope with increasingly fast-paced changes in technology. For others, especially younger, highly educated and experienced Internet users, the new technologies are simply a day-to-day reality. Without being particularly excited by

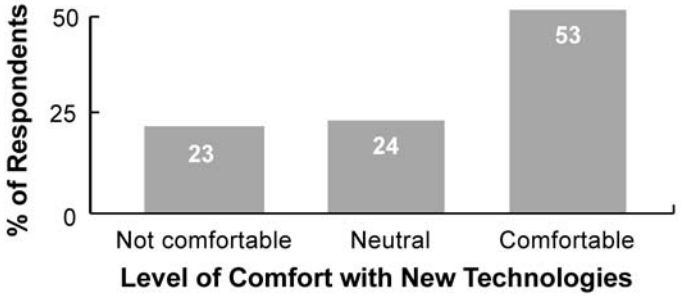
technological change, they simply accept ever-increasing access to a range of technologies, services and social networks accompanying the new technologies. For this group of users, these developments are part of their overall social, cultural and media landscape.

Thus, among such Internet savvy groups, concerns about things like the credibility of online media or the safety of Internet-delivered services such as online banking are not technology-related but situational. That is, individuals' concerns over the reliability of online newspapers or conducting business over the Internet are less about technology and more about confidence and trust in the institutions that provide services online.

7.3 Comfort with Technology

Canadians were asked in 2007, "How comfortable do you feel using new technologies in general?" As shown in Figure 7-1, while just over half expressed comfort, nearly a quarter said they were not comfortable with new technologies.

Figure 7-1 Level of comfort with new technologies



CIP 2007 — C2.238a (All respondents 12 years +, n=3013)

The highest general levels of comfort with new technology are found with younger respondents who have grown up in an Internet environment, as well as those older members of the Canadian population who were early adopters or are heavy Internet users, including broadband users. There is also a slightly higher level of technological comfort among higher income groups and males than among lower income groups and females.

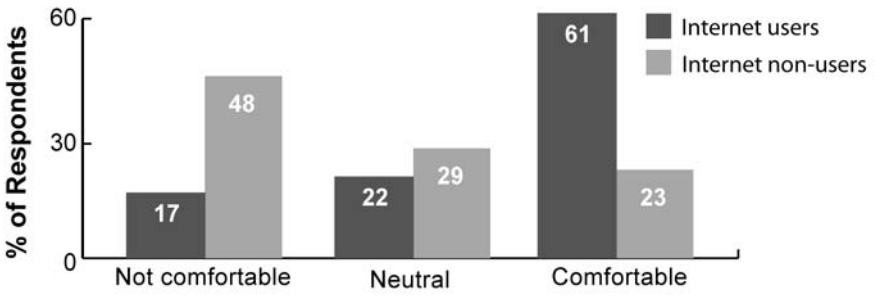
Not surprisingly, as shown in Figure 7-2, Internet users are much less likely to express discomfort with new technologies than are non-users.

CIP's index measuring comfort with technology allows identification of groups according to their level of comfort. Five (often overlapping) segments of Canadian society have a high level of comfort with new technology. The following are those most likely to express comfort with technology. The percentage provided reflects the proportion of those in the subgroup that reported comfort with technologies:

- Full-time students (76% expressed comfort)
- Heavy Internet users (75%)
- Youth, aged 12–17 years (74%)
- Highly experienced Internet users (15 years + online) (74%)
- Young adults, aged 18–24 years[9] (73%).

[9] Throughout this report, CIP has predominantly defined young adults as individuals aged 18–29. In certain circumstances, when analysis demonstrates discrete differences within this age categorization, young adults may also be classified as 18–24 years old or 25–29 years old respectively, as above.

Figure 7-2 Level of comfort with new technologies: Internet users versus non-users



CIP 2007 — C2.238a (All respondents 12 years +, n=3013)

In the next rank there are four groups within which about two-thirds are comfortable with technology:

- Broadband users (69%)
- Middle-aged adults, aged 25–34 (66%)
- Moderately experienced Internet users (10–15 years online) (66%)
- High income households ($80,000+ per year) (65%).

Males and experienced Internet users also have higher comfort levels than does the average user.

Not surprisingly, those Canadians most comfortable with new technologies in general tend also to be experienced and active users of the Internet. Those who have high levels of comfort with technology also tend to be early adopters of digital technology.

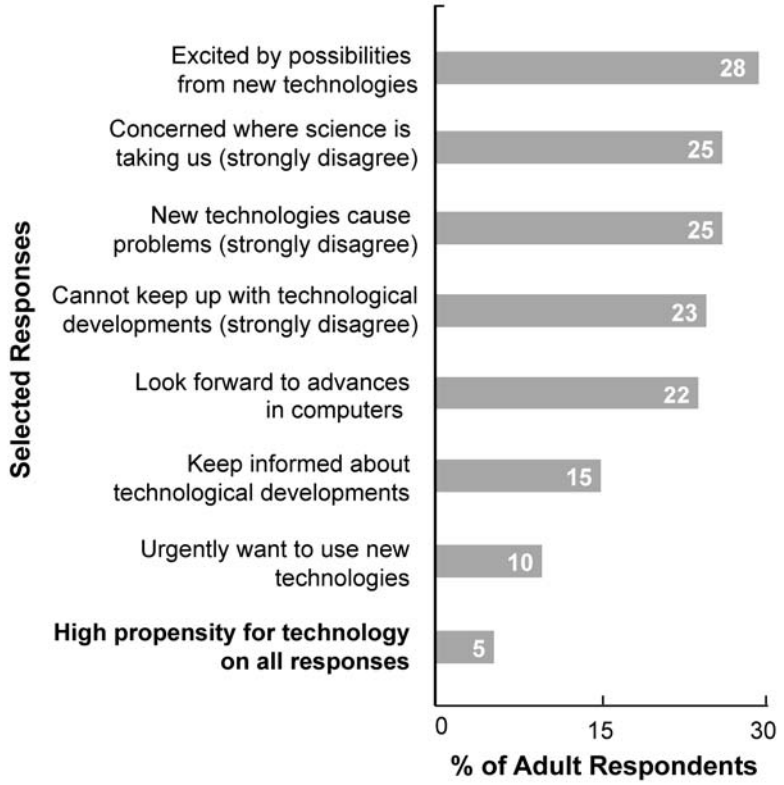
7.4 Technological Excitement and Anxiety

To explore further the propensity of Canadians to be open to technological and scientific developments, respondents were asked to agree or disagree with a range of statements about technological excitement and anxiety. Figure 7-3 shows those statements that generated the most agreement or disagreement; specifically, the figure lists both the percentage of respondents who indicated either they “totally agree” or “totally disagree” with each statement and a summary index of all responses.

The results reveal a rather mixed reaction to technological developments in general, with the majority of Canadians taking a more neutral stance on the specific issues raised. While Canadians appear to be hopeful with respect to scientific advances and the possibilities offered by new technologies in general, the vast majority do not see themselves rushing out to buy the latest technology nor spending a lot of time keeping up on all the latest developments.

There is, however, a small minority who are very excited about new technology and computer advances. Nearly 5% of the overall population show a high propensity for openness to new technologies for each of the seven factors listed in Figure 7-3. A profile of these users is provided in Figure 7-4.

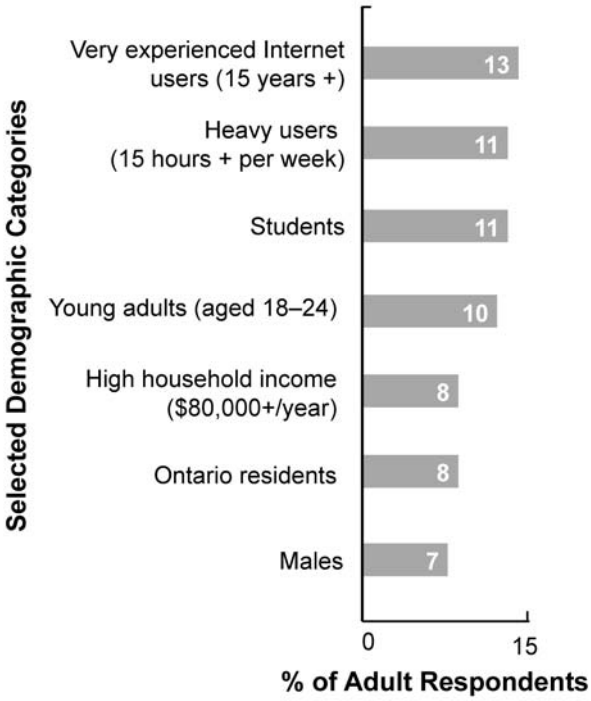
Figure 7-3 Selected responses indicating a high propensity for technologies



CIP 2007 — C2.057a–063a (All respondents, 18 years +, n=2609)

When examining relationships with the index of openness to new technologies — a combination of the measures reported in Figure 7-3 — the results corroborate the profile in Figure 7-4. In addition to the relationships observed above, it is worth noting that Internet users are more positive in their responses to new technologies than are non-users, and broadband users are more positive than are dial-up users. Age is also a significant factor, with Canadians 18–24 years old ranking nearly twice as high as those 65 years and older on openness to new technologies. This profile identifies the likely early adopters of new digital devices.

Figure 7-4 **Demographic breakdown of those indicating a high propensity for technology**



CIP 2007 — C2.063TF x demographic variables (All respondents,18 years +, n=2609)

7.5 Security and Privacy Concerns about the Internet

In addition to general comfort with technology, it is important to consider specific concerns about the Internet itself. These include concerns about the security of e-mail and financial information online, the capacity of children to surf the Internet safely and the reliability of online information.

Asked whether they thought e-mail was a secure way to communicate, Canadians are fairly evenly divided, with 36% agreeing or strongly agreeing and 34% disagreeing or strongly disagreeing (see Table 7-1). Internet users are a little more confident about e-mail security than are non-users: 38% of users agree that e-mail is secure, compared to 28% of non-users.

As demonstrated in Figure 7-5, there is a clear concern about the security of online banking. Among adult Canadians surveyed, close to nine in ten expressed some level of concern with the security of online information related to credit or bank cards, whether or not they used the Internet, with a third “extremely concerned” and another quarter “very concerned.”

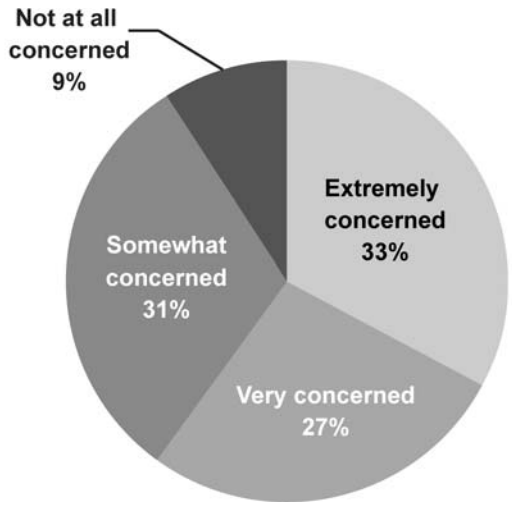
Table 7-1 Attitude towards e-mail as a secure method for communicating

E-mail is Secure	Sample Subgroups		
	All respondents	Internet users	Internet non-users
	%	%	%
n	*2685*	*2084*	*601*
Strongly agree	16	16	17
Agree	20	22	11
Neutral/no opinion	30	28	37
Disagree	16	18	11
Strongly disagree	18	16	25

CIP 2007 — C2.242 (All respondents, 18 years +)

Note:
- In these comparisons, some totals may not add to 100% due to rounding.

Figure 7-5 Concern for financial security on the Internet



CIP 2007 — C2.070 (All respondents, 18 years +, n=2620)

These results probably are a reflection of the fact that privacy and identity theft have become growing concerns in Canadian society in the last few years. The groups with lowest concern, and thus more trust in online financial transactions, include

- students (only 17% saying they are “very concerned”)
- young adults, aged 18–24 (22%)
- heavy Internet users (15 hours + per week) (23%)
- high income earners ($80,000+ per year) (25%).

By contrast, those showing the highest concern for online financial security are

- Quebecers (44% declared they are “very concerned”)
- Francophones (42%)
- non-users (40%)
- middle-aged adults, 45–59 years old (39%)
- Internet users with little experience (less than five years online) (38%)
- older Canadians, aged 60+ (37%).

As is discussed in Chapter 13, these very real concerns do not seem to deter many Canadian Internet users from shopping and banking online, although they may be a deterrent to the growth of the online marketplace.

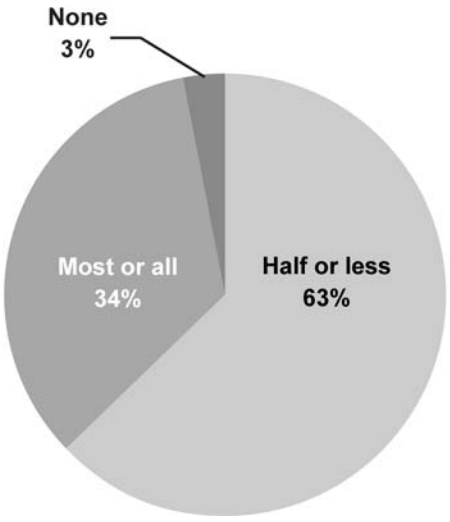
More than one in four adults with children online are concerned that a child in their household lacks the skills and knowledge to browse the Internet safely. The main concern, shared by more than half of those with children online, is that the child or youth will have contact with unknown or unwelcome persons online. This issue is discussed further in Chapter 10.

In general, Canadians are fairly positive about the Internet, but as has already been suggested, their enthusiasm is restrained. A good example is their assessment of the impact of the Internet on work performance and productivity: less than 20% feel that it has improved productivity a lot, while 27% think there has been some improvement. A majority — 55% — think the Internet has had no effect at all, and a small percentage of respondents feel it has had a negative effect. For further analysis and discussion about similar attitudinal measures towards the Internet, see Chapter 10.

7.6 Information Reliability: Online Versus Traditional Sources

While many Canadians regard the Internet as a source of information, most are sceptical about the reliability of information online. As Figure 7-6 illustrates, only one-third claim that “most” or “all” of the information on the Internet is reliable. About two-thirds claim that half or less of the information found online is reliable.

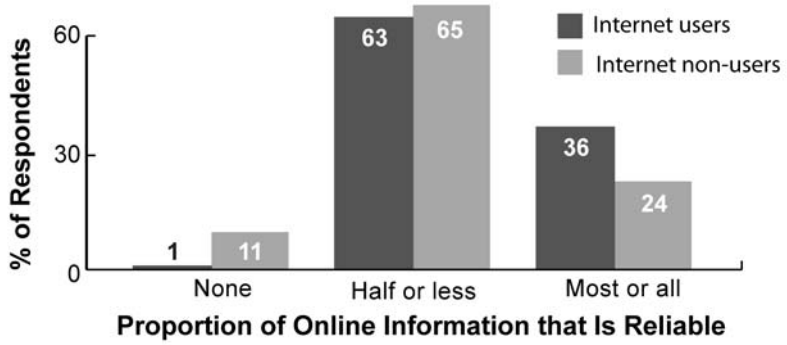
Figure 7-6 Perceived reliability of information on the Internet



CIP 2007 — C2.067a (All respondents 12 years +, n=2901)

The majority of Internet users (63%) share similar values to the population in general, believing that half or less of the information on the Internet is reliable. Nearly a third of users have confidence in online information, most likely because they have identified reliable websites and other information sources. However, as Figure 7-7 illustrates, most interesting is that even one-quarter (24%) of Internet non-users believe that information found online is reliable, though they do not use the Internet.

Figure 7-7 Perceived reliability of information on the Internet: Internet users and non-users



CIP 2007 — C2.067a, 071 (All respondents, 12 years +, n=2901)

Analysis across selected demographic categories as provided in Table 7-2 reveals that those who express the highest trust in Internet information are heavy Internet users, middle-aged Canadians between 45 and 59 years of age, and inhabitants of larger communities. Older, more frequent Internet users are most likely to use the Internet selectively and to have confidence in the online sources they use regularly. Noteworthy is that across most demographic categories, approximately two-thirds of all respondents perceive at least half or less of the information on the Internet is reliable. Given that this also includes those who do not use the Internet, the overall feeling of trust for information on the Internet is impressive.

Table 7-2 Perceived reliability of information on the Internet across selected demographic variables

Demographic and Other Categories	Percentage of Respondents	
	Most or all of it	Half or less of it
	%	%
Level of engagement		
Light user (<5 hours)	32	67
Moderate user (5–<15 hours)	35	65
Heavy user (15 hours +)	40	60
Age		
12–17	32	67

Demographic and Other Categories	Percentage of Respondents	
	Most or all of it	Half or less of it
	%	%
18–29	31	68
30–44	35	65
45–59	40	57
60+	31	64
Community size		
1,000,000+	38	62
500,000–999,999	32	68
100,000–499,999	34	67
5,000–99,999	33	68
<5,000	32	69

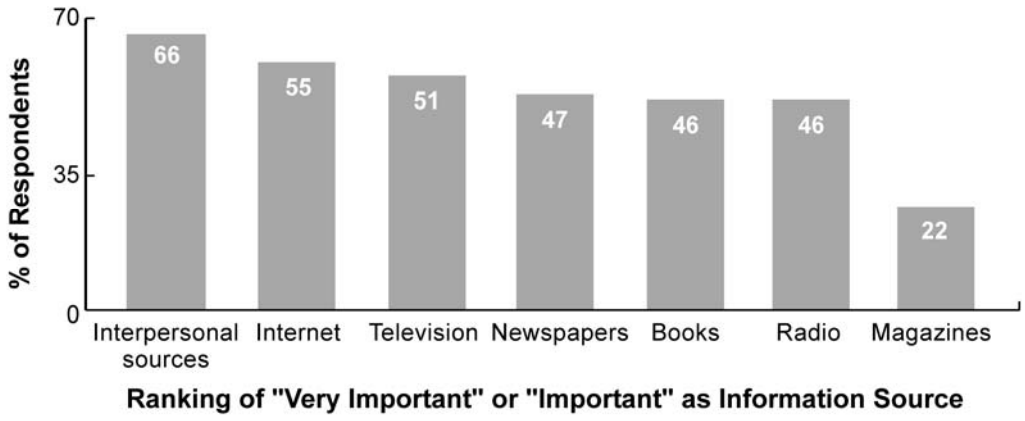
CIP 2007 — C2.067a x demographic variables (All respondents, 12 years +, n=2901)

7.7 Importance for Information: Internet Compared to Other Sources

A measure of how prominent the Internet has become in everyday life is to look at how important users consider it is as a source for providing information. In order to gauge the impact of the Internet more clearly, CIP asked respondents about their feelings of how important various outlets were as a source of information, including the Internet, various media and interpersonal sources.

Surprisingly, only interpersonal sources such as family and friends are consistently more important to Canadians than the Internet as a source of information. Figure 7-8 provides a comparison of "very important" and "important" responses combined.

Figure 7-8 Perceived importance of interpersonal sources and various media for information



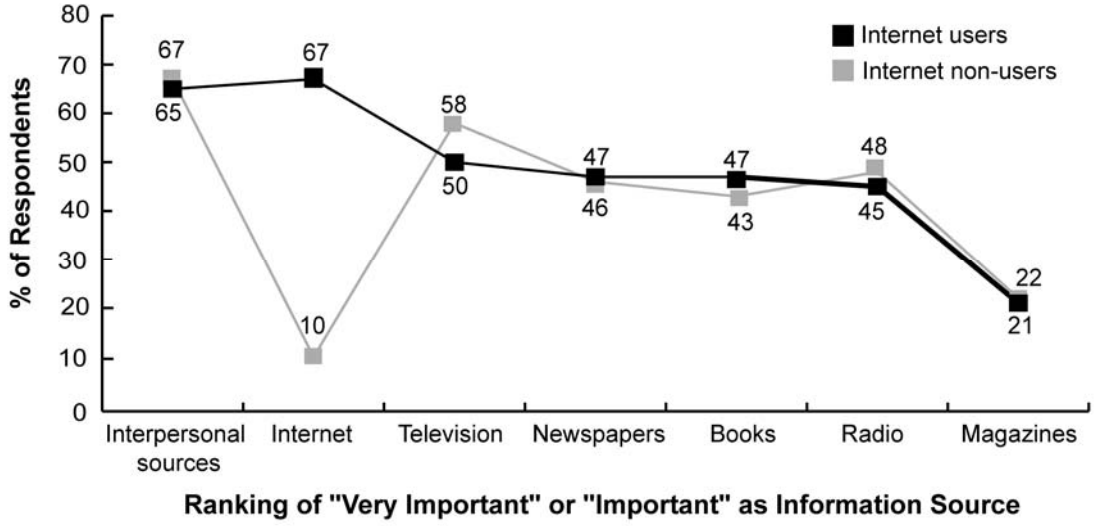
CIP 2007 — C2.043a–49a (All respondents, 12 years +, n=3035)

Among the 55% who regard the Internet as an important source of information, nearly one in three rate it as "very important." Of those who view it as "not at all important" (20%), most are non-users or infrequent users.

Interestingly, as shown in Figure 7-9, Internet users and non-users do not differ significantly on the degree of importance they attribute to various media or interpersonal sources, with one exception: While only 10% of non-users report that the Internet is an important source of information, 67% of Internet users rank the Internet as important for this same purpose.

Across media and interpersonal sources, the only other significant difference is the ranking of television as an important information source for non-users (58%) versus users (50%). However, television's level of importance as the primary mass media source is the same among both groups. And it is remarkable how similar both groups are in indicating a range of important media sources in their lives, whether or not they use the Internet.

Figure 7-9 Perceived importance of interpersonal sources and various media for information: Internet users versus non-users



CIP 2007 — C2.043a–49a (All respondents, 12 years +, n=3035)

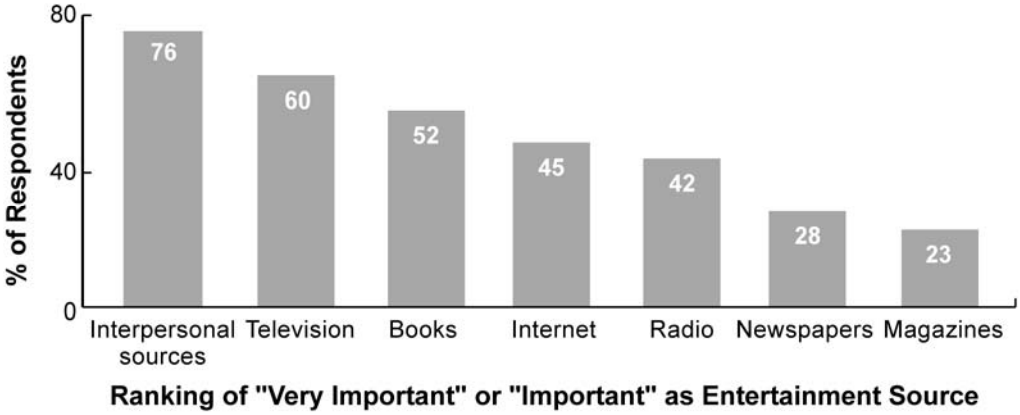
The continuing importance of a range of traditional print media (newspapers and books) and broadcasting media (television and radio) as important sources of information for many Canadians tends to further support CIP's contention that the Internet is supplementing those sources rather than replacing them. In addition, scepticism about online information should not obscure the likelihood that most Canadians are able to find on the Internet some trustworthy sources for news and information (if not always trusting *all* Internet sources).

7.8 Importance for Entertainment: Internet Compared to Other Sources

The Internet is no longer simply a source of information for Canadians — it is also a source of entertainment. The spread of broadband connections in the past decade has meant that the Internet increasingly competes with more conventional entertainment sources for public attention. As can be seen in Figure 7-10, the Internet has become established as a significant conduit for

entertainment content and services. While compared to its ranking as a provider for information it is considered less important than other sources for entertainment, its very rapid rise in this comparative scale is noteworthy.

Figure 7-10 Perceived importance of interpersonal sources and various media for entertainment



CIP 2007 — C2.050a–56a (All respondents, 12 years +, n=3037)

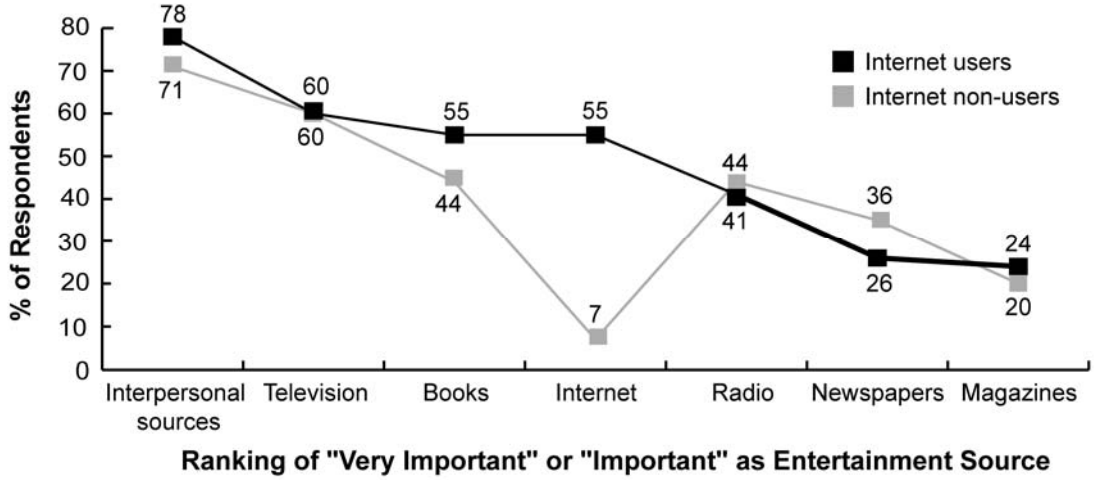
Further breakdown of this measure finds that approximately one in five regards the Internet as "very important" as a source of entertainment and one in four says it is "important." Of the 24% that rate it as "not at all important," almost all are light Internet users or non-users.

Television remains the medium of choice for entertainment, trailing only interpersonal sources. Books also remain important for entertainment. Newspapers and magazines are valued more for information.

As illustrated in Figure 7-11, there are some subtle differences in the way Internet users and non-users access information from a variety of sources, although the relative importance placed on interpersonal sources is similar. Among users, the Internet is an important source of entertainment for over half of respondents, just below television and at the same level as books, but still well below interpersonal sources. Compared to users, non-users put slightly less emphasis on interpersonal sources, but rank newspapers higher.

As with information importance, it is interesting to note that widespread Internet activity has had little impact on lessening the important role of existing media as a means for fun, relaxation and diversion. Indeed Internet users value all media (except newspapers) more than do non-users as sources of entertainment.

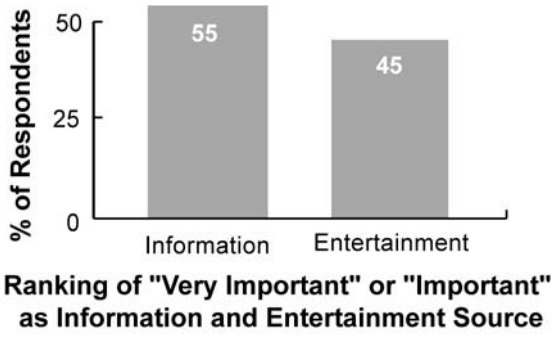
Figure 7-11 **Perceived importance of interpersonal sources and various media for entertainment: Internet users versus non-users**



CIP 2007 — C2.050a–56a (All respondents 12 years +, n=3037)

Figure 7-12 isolates the perception of the Internet as an important source of information and entertainment for respondents. As can be seen, more Canadians continue to value the Internet for information than for entertainment, but the importance of the Internet as a source of entertainment has increased considerably since 2004.

Figure 7-12 **Perceived importance of the Internet for information and entertainment**



CIP 2007 — C2.043a, 050a (All respondents, 12 years +, n=3037)

For adult non-users, the Internet is regarded as an important source of information by 53% (66% of Internet users) and for entertainment by 42% (52% of Internet users).

Even though the Internet is still regarded by most as more important for its information than its entertainment value, it is interesting that some population subgroups now perceive the Internet to be equally important for information and entertainment, and in some cases, for it to be more important as a source of entertainment than information. Table 7-3 provides a breakdown of perceived importance of the Internet as a source of information and entertainment across key demographic variables.

Table 7-3 Perceived importance of the Internet for information and entertainment across demographic variables

Demographic and Other Categories	Percentage of Respondents — Ranking of "Very Important" or "Important"	
	Information	Entertainment
	%	%
n	*2986*	*2996*
Language group		
Anglophone	57	45
Francophone	47	40
Region		
British Columbia	62	46
Alberta	56	46
Prairie provinces	55	41
Ontario	59	48
Quebec	49	42
Atlantic provinces	42	38
Age		
12–17	71	73
18–29	70	68
30–44	61	48
45–59	52	36
60+	31	21
Life stage		
Full-time student	75	75
Full-time employed	60	45
Retired	29	21
Income		
<$40,000	42	37
$40,000–$59,999	52	46
$60,000–$79,999	59	44
$80,000+	66	52
Experience online		
<6 years	52	47
6–<10 years	69	57

Demographic and Other Categories	Percentage of Respondents — Ranking of "Very Important" or "Important"	
	Information	Entertainment
	%	%
10–<15 years	73	59
15 years +	74	57
Level of engagement		
Light user (<5 hours)	45	32
Moderate user (5–<15 hours)	66	54
Heavy user (15 hours +)	83	71
Broadband access		
Yes	73	62
No	57	41

CIP 2007 — C2.043a, 050a x demographic variables (All respondents, 12 years +)

The Internet is considered as important for entertainment as for information among the following groups:

- Students — Three-quarters indicate that the Internet is “very important” or “important” for both information and entertainment
- Youth — Over seven in ten indicate the Internet is “very important” or ”important” for information and entertainment
- Young adults (18–24) — More than seven in ten indicate that the Internet is “very important” or ”important” for information and entertainment.

The value of the Internet for entertainment is higher among Anglophones than Francophones, and is valued most highly in Ontario compared to all other Canadian provinces. It is interesting that some of the other groups more engaged with the Internet — heavy Internet users, broadband subscribers, long-time Internet users and higher income households — also accorded high importance to the Internet, but more for its informative functions. Youth are more likely than adult users to value the Internet for entertainment.

When asked how they spend their time online, more than half of Internet users estimate that the majority of their time online is devoted to information-related activities. Less than 30% spend the majority of their online time engaging in entertainment activities. About one in five reports an equal division of time online between information and entertainment.

While comfort with technology is not related to the division of time online, social networking is. An index was constructed based on the extent of respondents’ engagement in social networking, the most active level being both visiting and contributing, the middle level only visiting, and the lowest level not engaging at all in social networking sites. Active social networkers — those who both visit and contribute to social networking sites — are more likely than those less involved with social networking to report going online primarily for entertainment (35% compared to 25%). This finding suggests that social networkers perceive the time they spend online interacting with social networks as more for entertainment than for information.

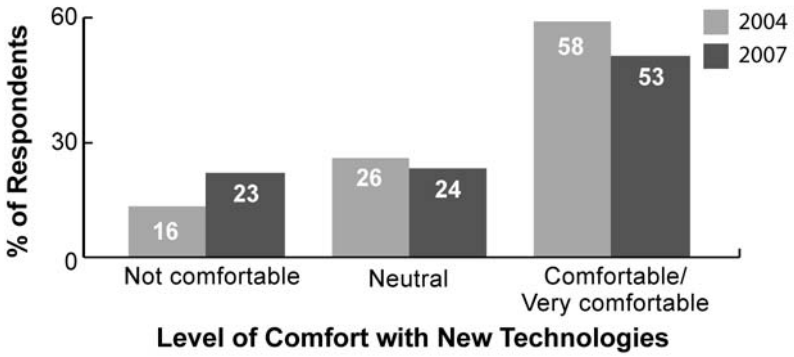
Interestingly, social networking is directly related to comfort with technology. Four out of five active social networkers express comfort with technology, compared to just over half of those who never participate in social networks.

In general, comfort with technology is a good predictor of involvement with more advanced Internet uses. For example, 80% of Internet users who have downloaded content from a file-sharing service express comfort with technologies, compared to 56% of those who have not done so.

7.9 Trends: 2004 to 2007

With the rapid development in hardware and telecommunication connections in the past several years, one might expect that Canadians have become more comfortable with new technologies. In fact, as Figure 7-13 illustrates, Canadians were slightly more likely to express discomfort in 2007 than they were in 2004. Nevertheless, most respondents expressed reasonable comfort with new technologies, especially Internet users.

Figure 7-13 Comfort with new technologies: 2004 to 2007

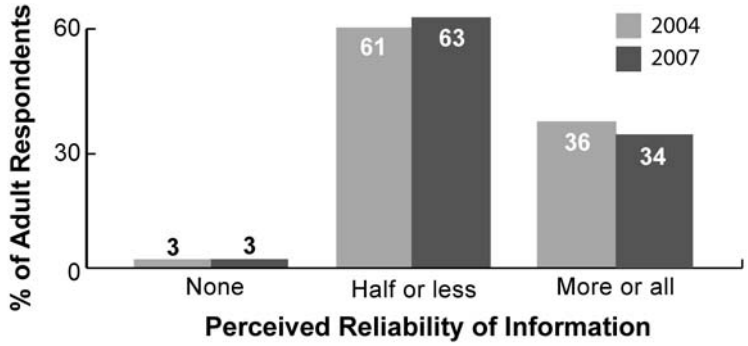


CIP 2004 — C1.149a (n=2991); CIP 2007 — C2.238a (All respondents, 18 years +, n=2726

Figure 7-14 compares respondents' perceived reliability of information on the Internet in 2004 and 2007. There is essentially no change in perceptions of the reliability of information on the Internet.

Perhaps the most important change over the past few years is the rapid growth in the importance of the Internet for entertainment. Although the relative ranking in importance of information went up only slightly, even for users, the most noteworthy finding is the increased importance of the Internet as a platform and an entity in itself for entertainment. Table 7-4 provides a breakdown of importance of the Internet for both information and entertainment across several indices.

Figure 7-14 Perceived reliability of information on the Internet: 2004 to 2007



CIP 2004 — C1.040 (n=2979); CIP 2007 — C2.067a (All respondents, 18 years +, n=2614)

Table 7-4 Importance of the Internet as a source of information and entertainment: 2004 to 2007

Importance of Internet	Sample Subgroups			
	2004		2007	
	All respondents	Internet users	All respondents	Internet users
	%	%	%	%
n	*2835*	*2154*	*2709*	*2095*
Important as a source of information	50	62	53	66
Not important as a source of information	33	18	31	17
Important as a source of entertainment	26	31	42	52
Not important as a source of entertainment	55	36	39	26

CIP 2004 — C1.030, 031; CIP 2007 — C2.043a, 050a (All respondents, 18 years +)

No matter how it is measured, there has been a dramatic increase since 2004 in the importance attributed to the Internet as a source of entertainment. Since 2004 the percentage dismissing the Internet as a source of entertainment has declined 16% in the total Canadian population and 10% among Internet users.

This appears to be an important trend: the Internet is becoming a multipurpose platform, valued by most Internet users equally for information and entertainment.

In terms of time spent, 64% of the adult Internet user population reported going online primarily for information in 2004, while 22% went online primarily for entertainment. In 2007, 53% went online for information and 28% for entertainment. In 2004, 13% went online equally for both, while in 2007 19% divided their time equally. In total, then, about 35% spent at least half their time online for entertainment in 2004, compared to 47% in 2007. While information remains the main reason for going online, entertainment has increased dramatically as a motive for using the Internet.

7.10 Conclusions

As in 2004, Canadians in 2007 are generally comfortable with new technologies and with a wide range of information and entertainment media. While they are concerned about the security of e-mail and financial information as well as the safety of children online, and sceptical about the reliability of information on the Internet, Canadians still regard the Internet as an important source of information and, increasingly, of entertainment. Youth value the Internet not only for the access it provides to information and entertainment but also for interpersonal interaction. The continuing importance of interpersonal sources for both information and entertainment underlines the significance of social networking online. For many younger users, the Internet is a place to go for both passive consumption of content and interactive experiences. The high level of importance placed on interpersonal sources — by users and non-users — tends to refute the idea that the digital world is an impersonal one. Comfort with technology is an important factor and clearly influences early adoption by Canadians and a willingness to try new applications and activities online.

8 Internet Use: Applications Online

8.1 Key Findings

- E-mail remains the most frequently used online communication application for all Internet users (95%)
- Internet users spend an average of 4.4 hours per week attending to e-mail
- Text messaging via mobile phones is an important emerging communication application for youth (12–17) and young adults (18–24) with penetration levels at 77% and 89% respectively, compared to other adult age categories (18 years and older: 41%)
- Use of instant messaging (IM) and participation in chat rooms continues to proliferate, and is nearly as popular as e-mail for youth (12–17) and young adult (18–29) Internet users
- Twice as many youth respondents (12–17) and young adult respondents (18–29) use blogs and wikis as the overall adult Internet user category (18 years and older)
- Telephony on the Internet has remained stable with adult Internet users since 2004 (13%); however, substantially more youth (24%) and young adults (18–29: 17%) are using telephone applications online
- Google Earth is very popular in Canada, achieving overall penetration levels of 44%, and is used especially among French-speaking Quebecers
- iTunes is a very popular e-commerce music site reported to be used by one in five Internet users, predominantly those aged 12–17 (35%) and 18–29 (31%)
- One in four adults visits music downloading sites other than iTunes, whereas 55% of youth and 47% of young adult (18–29) Internet users engage in a similar activity
- New applications, such as Skype (Internet-based telephone service) and virtual world sites, are being increasingly adopted by younger Canadian Internet users
- Various simple forms of online creative expression, such as posting photographs, videos, creating websites and sending original creations, are increasingly popular activities, especially among Internet users under 30 years of age
- Posting photos is the most common form of shared creative expression (used by 33% of all users) and is very popular among younger Internet users, females and English-speaking residents of Canada
- The activity of creating a personal website has grown from 1% of all Internet users in 2004 to 20% of all Internet users in 2007
- For many Internet applications monitored, the heaviest users are in the 18–29 age group
- Most applications, aside from e-mail, chat rooms and virtual world sites, are more popular with males than females

8.2 Applications Online

As most readers are aware, the term “killer application” refers to a computer application that users find virtually indispensable. Up until 2002 there were really only three of these related to Internet use: Internet browsers, e-mail and search engines.

Today, online applications are increasingly diverse in the activities they enable Internet users to accomplish and participate in. Most notably they allow users to manipulate media requiring larger bandwidths from more locations and from more types of computing platforms than was previously feasible. In 2007, Internet users were less concerned than in the past with the mechanics of applications and the location from which they use them. The proliferation of increasingly easier-to-use applications and relatively powerful computers to connect to the Internet from almost anywhere has dramatically changed the world in which we engage.

Some consider that we are now in the early days of "cloud computing." In the realm of information technology, this refers to an online environment where consumers subscribe to services that provide computing capacity, software and a user-friendly interface, and after which there is not much more required than a terminal, keyboard, mouse and microphone to access the full range of computer and online services from any location. The result is that Internet users spend less time worrying about hardware, software and connectivity and focus more on the communications they wish to engage in and the media manipulations they wish to perform.

One objective of this study is to investigate penetration levels for some of the longer standing activities of Internet users and to try to establish benchmarks for some of the newer ones. While upcoming killer applications are difficult to predict, this study attempts to identify a few. In this chapter specific communications applications and creative activities that Canadians engage in online are examined. Given the significance of changing online patterns of consumption across several similar applications, comparisons are made throughout the discussion to baseline data from 2004 when applicable, rather than summarizing this analysis only in the Trends section of this chapter. Many of the applications discussed were not prevalent in 2004, and therefore many baseline adoption levels are not available for comparison purposes.

8.3 E-mail Use

E-mail use has reached a plateau. The percentage of Internet users who use e-mail has increased only slightly since 2004, from 91% to 95%. Overall, all Canadian Internet users spend an average of 4.4 hours reading and writing e-mails. Adult Internet users spend an average of 4.7 hours per week reading or writing e-mail. More than half of all adult Internet users attend to e-mail more than six hours per week. This is a marked increase from 2004 when the average time spent on e-mail by adults was 3.9 hours per week.

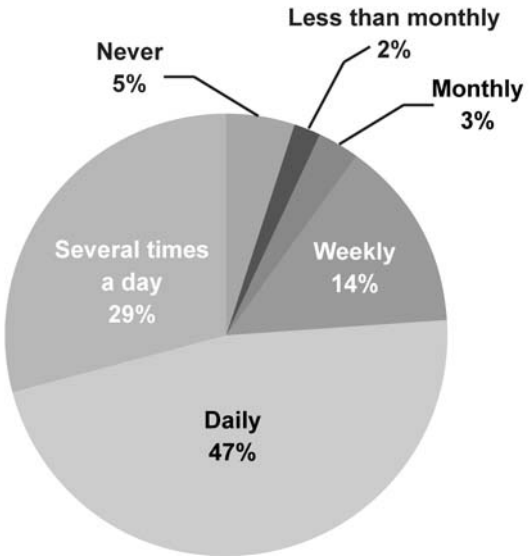
E-mail appears to be used more often by adults than by youth, the latter of which use it fairly casually. Half of the youth population uses it at least sometimes (fewer than two hours a week) while 20% of youth do not use it at all. On average adults use e-mail 4.7 hours per week while youth use it only 1.6 hours per week.

Internet users who access their e-mail from mobile devices at least some of the time spend an average of 7.2 hours engaging in e-mail applications. People in the highest income quartile spend significantly more time with e-mail than do those with less income.

In 2007, CIP looked at the frequency with which people checked their e-mail. This provides insight into, not only the proliferation of e-mail as a communication mode, but also the degree to which people are dependent on online communication technologies in general. Figure 8-1 provides a breakdown of how often the Internet is used to access e-mail for all Internet users.

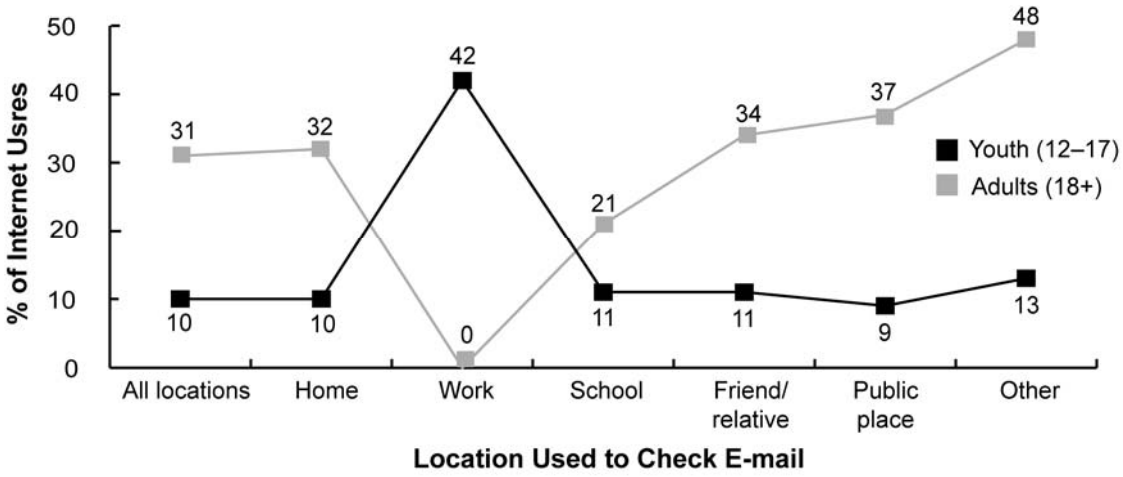
Three of every four users reported attending to their e-mail at least daily. Four groups are significantly more likely than others to check multiple times per day. These include those who access e-mail from work, those employed full time, those aged 25–34 and French-speaking Quebecers. Also, the propensity to check e-mail increases with education, income and years of experience online. Half of those with university degrees check their e-mail several times a day. Internet users with 15 or more years of experience online are three times as likely as those who have been online fewer than five years to check their e-mail several times daily (46% compared to 13%). As Figure 8-2 indicates, adults attend to e-mail on a regular basis, much more frequently than do youth, across various access locations.

Figure 8-1 Frequency with which users check e-mail online



CIP 2007 — C2.086 (Internet user respondents, 12 years +, n=2370)

Figure 8-2 Location used to check e-mail: Adults versus youth

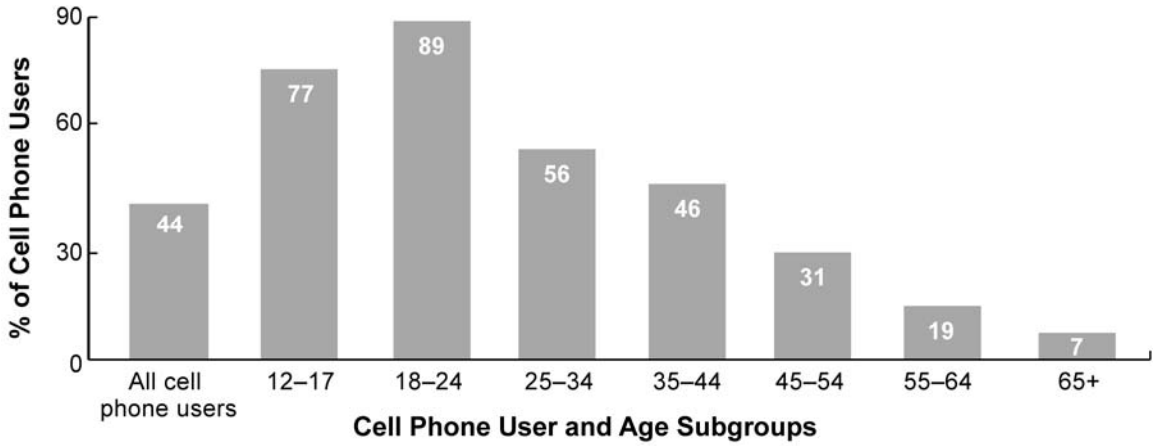


CIP 2007 — C2.086, 083 x SAMPLEB (Internet user respondents, 12 years +, n=2370)

8.4 Text Messaging

Text messaging, also known as Short Message Service (SMS), provides the opportunity to send short text messages predominantly from one mobile phone to another. About 61% of Canadians have personal cell phones; of those, more than four in ten have used them to send text messages. As Figure 8-3 illustrates, those who most frequently use text messaging are young adults, in the 18–24 age group (89%). Youth and young adults make much greater use of SMS than e-mail and other applications for daily communication. The text messaging adoption level for adult (18 and older) cell phone users is 41% while for youth (12–17) it is 77%. Text messaging is much less common in older age groups. As with other applications, Quebecers use text messaging less than do residents of other provinces.

Figure 8-3 Proportion of respondents who text message, across age groups



CIP 2007 — C2.087 (Cell phone user respondents, 12 years +, n=799)

8.5 Comparison of Selected Online Communication Applications

The range of communication-related Internet applications has proliferated substantially since the last CIP study in 2004. Some applications allow participants to communicate one-on-one, such as instant messaging (IM) and those that employ Voice over Internet Protocol (VoIP). Others allow interactive communication in real time, such as in chat room applications. Some applications allow communication between authors and Internet users through posts to blogs and discussion boards, either in the form of personal journals or topical discussions, or, in the case of wikis, contributions to collaborative reference sites.

Table 8-1 summarizes adoption levels of these applications across various age groups, providing a breakdown of those Internet users who have ever used them and the percentage who use them on at least a daily or weekly basis.

Note that users of discussion boards were asked only whether they posted to them. In the case of blogs and wikis, which invite more engagement, respondents were asked, “Do you ever read or contribute to a blog or wiki?” This was intended to capture those that use them as a resource but do not necessarily contribute.

Three of every four users reported attending to their e-mail at least daily. Four groups are significantly more likely than others to check multiple times per day. These include those who access e-mail from work, those employed full time, those aged 25–34 and French-speaking Quebecers. Also, the propensity to check e-mail increases with education, income and years of experience online. Half of those with university degrees check their e-mail several times a day. Internet users with 15 or more years of experience online are three times as likely as those who have been online fewer than five years to check their e-mail several times daily (46% compared to 13%). As Figure 8-2 indicates, adults attend to e-mail on a regular basis, much more frequently than do youth, across various access locations.

Table 8-1 **Selected online communication applications, across age groups**

Online Communication Application	Percentage of Internet Users Across Use Categories (12 years +, n=2362)		
	Ever use	Daily or more	Weekly or more
	%	%	%
E-mail	95	76	90
Instant messaging	57	32	47
Chat	17	6	10
Send e-mail attachments	81	33	58
Telephone online	14	4	8
Blogs (personal)	14	4	8
Blogs (read or contribute)	27	7	14
Wikis (read or contribute)	16	2	8
Discussion boards (contribute)	34	10	20
Online Communication Application	**Percentage of Adult Internet Users Across Use Categories (18 years +, n=2094)**		
	Ever use	**Daily or more**	**Weekly or more**
	%	%	%
E-mail	95	79	91
Instant messaging	54	29	43
Chat	14	5	8
Send e-mail attachments	82	36	61
Telephone online	13	4	7
Blogs (personal)	11	3	7
Blogs (read or contribute)	24	6	13
Wikis (read or contribute)	14	2	7
Discussion boards (contribute)	31	9	18
Online Communication Application	**Percentage of Youth Internet Users Across Use Categories (12–17 years, n=273)**		
	Ever use	**Daily or more**	**Weekly or more**
	%	%	%
E-mail	90	54	80
Instant messaging	83	55	73
Chat	35	16	22
Send e-mail attachments	70	11	37
Telephone online	24	6	13
Blogs (personal)	32	8	21
Blogs (read or contribute)	48	13	26
Wikis (read or contribute)	30	9	15
Discussion boards (contribute)	59	19	38

Online Communication Application	Percentage of Youth Internet Users Across Use Categories (18–29 years, n=475)		
	Ever use	Daily or more	Weekly or more
	%	%	%
E-mail	97	80	93
Instant messaging	84	54	75
Chat	21	11	16
Send e-mail attachments	87	30	59
Telephone online	17	6	10
Blogs (personal)	19	6	11
Blogs (read or contribute)	38	10	21
Wikis (read or contribute)	19	4	12
Discussion boards (contribute)	50	18	36

CIP 2007 — C2.086–091, 095, 096, 099 (Internet user respondents, 12 years +, n=2362)

Comparing the use of applications across age groups reveals that older Internet users are much more reliant on more popular communication applications, while youth and young adults have more readily adopted newer forms of interaction. Eight in ten youth and young adults (18–29) make use of IM while only five in ten of adults overall do so. As the differences in Table 8-1 indicate, youth and young adults are also considerably more reliant on new applications than are adults. More young people use these applications and they use them much more frequently. Youth use Internet telephony twice as often as do adults. Nearly five in ten youth read or contribute to a blog, and over three in ten actually work on their own blog — again, levels far exceeding the averages found in the overall adult Internet user population. Chat rooms are very popular among youth, where penetration levels are approximately three times greater than for adults. While young adults (aged 18–29) exhibit similar adoption levels as youth, the frequency of their use of newer communication technologies still mirrors the less frequent online behaviour patterns of adults overall. Youth are embracing new communication technologies and using them very frequently. These patterns may continue as youth advance through the life stages.

In examining the effects of Internet use on other communication practices, the study found that about half of Canadian users have reduced their reliance on traditional telephone services as a result of using VoIP and e-mail.

In general, the study found some other noteworthy demographic comparisons. Males are more likely to use all of the following applications and to engage in them more frequently than are females: IM, reading and writing blogs, reading and contributing to wikis, and participating in discussion forums. Students are far more likely than other users to blog and to participate in discussion forums. While Francophone Quebecers tend to make more frequent use of IM, English-speaking Internet users are more active in discussion forums.

8.6 Selected Recently Released and More Commonly Used Internet Applications

To get a broader perspective on Canadians' overall adoption of various Internet capabilities, Internet users were asked about a selection of recently introduced and more commonly used applications. Table 8-2 summarizes penetration levels of some newer functions across all Internet users and various age groups. Respondents who reported they "sometimes" or "often" use these applications (as opposed to "seldom" or "never") are reported below. As becomes clear in Table 8-

2, young adults (aged 18–29) demonstrate the most widespread use of these new and popular applications.

Table 8-2 Selected recently introduced and more commonly used Internet applications, across age groups

Internet Application	Percentage of Internet Users Who Use an Application Sometimes or Often			
	All Internet users	Adults (18 years +)	Youth (12–17)	Young adults (18–29)
	%	%	%	%
n	*2344*	*2074*	*268*	*472*
Skype	8	8	6	8
Joost	1	1	1	<1
Google Earth	44	44	46	47
iTunes	22	20	35	31
Music websites (other than iTunes)	29	25	55	47
Wikipedia	35	33	48	45
Virtual world websites	5	3	15	4

CIP 2007 — C2.106–112 (Internet user respondents, 12 years +)

The following discussion provides a brief description of each application together with an analysis of adoption levels of each by Canadians.

8.6.1 Skype

Skype is an Internet protocol voice and video communications program. It is primarily used for voice communications and has the ability to connect to regular landline numbers for calls originating from computers. It appears to have limited adoption with Canadians, and more young adults use it than do youth or the overall adult Internet user population. When the analysis is expanded to include users who use Skype "seldom," the user base grows to 14% of adults and 19% of young adults (18–29). This is likely due to its use as a long-distance platform that incurs substantially reduced cost compared to long-distance services attached to a traditional landline phone. Calls to another computer anywhere in the world are free using Skype. When connecting to landline telephones using Skype, there is a charge applied that is a small fraction of regular long-distance charges.

8.6.2 Joost

Joost is an Internet Protocol TeleVision (IPTV) platform. It requires the installation of a proprietary media player and allows the streaming of long-form, on-demand, television-format programming in real time. At the time of our survey, it was in an expanded beta test, attaining high visibility among early adopters, but not yet launched commercially. This is reflected in the fact that 98% of those surveyed have never used it.

8.6.3 Google Earth

As many are aware, Google Earth is an interactive online atlas of the globe comprising mapped satellite images of the Earth's surface. Google Earth has a surprisingly high rate of adoption by

Internet users across all age groups. If respondents who also reported using the application "seldom" are included, the adoption level equals 68% of all Internet users and 74% of young adults (18–29). Interestingly, French-speaking residents of Quebec are more than twice as likely as other Canadians to use Google Earth.

8.6.4 iTunes

Since many consumers have become disaffected with music delivered on physical media such as CDs, the Internet has become a primary channel for music consumption for Canadians. iTunes is the e-commerce application that supports the iconic iPod digital music player. It allows music purchases of downloadable music files, music videos and television shows. It remains the primary site/application for digital download music sales, particularly among youth and young adult Internet users (aged 12–29). iTune's use is most prevalent among males and Anglophones.

8.6.5 Other Music Sites (not iTunes)

While iTunes is the industry leader for legitimate track sales, apparently Canadians turn to many other online sources to satisfy their musical cravings. Accessing music sites is a relatively popular activity, with 41% of Internet users participating in music downloading. When those who reported they "seldom" use such sites are included, the number of Internet users of music sites reaches seven in ten. The most frequent users of music sites tend to be those under age 30.

8.6.6 Wikipedia

According to Wikipedia, "a wiki is a collection of web pages designed to enable anyone who accesses it to contribute or modify content" — in other words, it is an interactive and continually evolving online encyclopedia. As Table 8-2 indicates, Wikipedia is a well-known Internet destination and popular with all Internet users. It has attained the highest level of penetration in the youth and young adult subgroups; these groups are also the most frequent users. Wikipedia users are more likely to be male than female, especially those that use it "often."

8.6.7 Virtual World Sites

Virtual world sites are interactive online environments in which multiple users engage in simulated play on the Internet. As Table 8-2 reflects, they are frequented much more by youth (12–17) than by young adults or adults. Visitors to such environments are at least twice as likely to come from this age group as any other. One interesting anomaly was found for the 35–44 age group, where the results suggest that virtual world sites are a pastime with this age group. Individuals between 35 and 44 years of age are three times more likely to participate in these sites than are those aged 25–34. Further investigation beyond this study is needed to determine if this finding is indeed an anomaly or if there is some other explanation for the increased adoption within this age group.

Males and younger Internet users are considerably more likely than others to use each of these seven specific applications and to use them more often.

8.7 Creative Applications on the Internet

A major element of the interactive and revolutionary nature of the Internet is that it enables people to publish and distribute personal creations via various types of media. CIP collected results across several simple measures that demonstrate creative activity online including the following: contributing to a personal website, posting photographs or videos online, and circulating original creations online. The data for those who "ever" engage in these activities are reported in Table 8-3. One might assume that creative engagement on the Internet is mostly pursued by proven early

adopters or younger Internet users in Canada. In fact, the data reveal that participation in creative expression online persists beyond the youngest segment of Internet users (12–17) and includes a significant portion of the young adult population (18–29).

Table 8-3 Proportion of Internet users engaged in selected creative activities online, across age groups

Creative Online Activity	Percentage of Internet Users Who Ever Engage in Creative Activities Online			
	All Internet users	Adults (18 years +)	Youth (12–17)	Young adults (18–29)
	%	%	%	%
n	*2344*	*2074*	*268*	*472*
Contribute to a personal website	20	18	34	25
Post photographs	34	32	48	52
Post videos	11	9	23	18
Send original creations	22	21	31	30

CIP 2007 — C2.092, 100–102 (Internet user respondents, 12 years +)

At first glance the numbers associated with the creative activity of contributing to a personal website may appear high. In the 2004 survey, a more general but related question regarding Internet activity garnered a response of only 1%. At that time, contributing to a personal website often involved using HTML, Flash and Javascript. By 2007 a number of destination sites had fully featured applications for fashioning a personal Internet presence with very little effort and experience; this substantially increased access to and the numbers of people engaged in this activity.

As is reported later in this document, Canadians are avid users of sites such as Facebook and MySpace, both of which are synonymous with active participation and engagement online. The mechanics of the technology have been simplified to all but eliminate any barriers to entry. Among contributors to personal Internet presences, those who visit such sites daily are twice as likely to be in the 12–17 age category as in any other age group.

Canadian innovators originated Flikr — what has become one of the most popular photo posting sites on the Internet. Posting photos is the most popular creative activity on the Internet for Canadians. Hugely popular with the younger demographic of this study, 24% of Internet users under 18 years of age do this at least weekly. This proportion is also consistent across young adults (18–29), where one in four post photographs on a weekly basis. Participation rates are indistinguishable across gender categories though the activity is almost twice as prevalent for English-speaking Canadians as for French-speaking Canadians.

Posting videos online is an activity made simple by one site in particular — YouTube. Posting videos online is somewhat more involved than posting still images from digital cameras. It requires some editing skill to effectively mount anything beyond extremely short segments. While this has been made simpler with today's video cameras, webcams and applications, it is not yet a popular activity among most users, with only 11% of Canadian Internet users engaging in it. Posting videos remains much more popular an activity among youth and young adults, with 18% and 15%, respectively, doing so at least monthly. Twice as many males as females engage in this activity.

To confirm the suspected greater levels of engagement by youth in creative activities online, CIP asked specific questions of youth pertaining only to downloading photographs and videos from the Internet. Of Internet users, 58% aged 12–17 reported they download photographs from the Internet — a greater level than those who reported posting their own photographs online (48%). One in three of the youth subgroup downloads photographs on a regular basis (at least once a week) while 13% do so daily or more frequently. With respect to posting video online, 45% of youth Internet users download video compared to 18% who post or upload video from an online source. Nearly one in four engage in this activity at least weekly and one in ten do so daily or more often. While youth may be using more caution or may be guided by parental restrictions with respect to creative content that is posted or uploaded to the Internet, CIP's results suggest youth quite freely download photographs and videos from others. As they grow older, the desire to express themselves by posting their own material online may grow also.

Sending original creations may include a variety of forms — from e-cards to e-mails with photo attachments. This activity is popular in near equal measure with respondents from ages 12 through 29, at which point the activity drops off sharply. This activity is more prevalent with male than female users, English-speaking than French-speaking Canadians and inhabitants from outside of Quebec.

8.8 Trends: 2004 to 2007

As noted, Internet applications have changed dramatically and proliferated at different rates from when CIP's benchmark survey was executed in 2004. As a result, many of the applications discussed in this chapter were not measured in the 2004 study. The limited number of indicators that can be compared suggests a dramatic increase in the use of many of the applications surveyed. In particular, it appears that adoption and proliferation are directly related to improvement in the mechanics, functionality and ubiquity of online activities. Since the 2004 survey, there have been significant increases in the percentage of Internet users going online for IM (36% to 54%) and chat (8% to 14%). E-mail use has also increased slightly, from 91% in 2004 to 95% in 2007, and reliance on e-mail increased considerably, based upon the frequency of use. For the adult Internet user population, average use per week has increased 18% since 2004. The use of the Internet for telephone-like communications has remained stable at about 13%.

The most notable trend, however, is the sharp increase in the use of the Internet for various forms of creative expression, from posting photos and videos to writing blogs. Nearly one in three Canadian Internet users under 30 years of age has circulated an original creation of some sort via the Internet. The number of Internet users who maintain a personal website increased from less than 1% in 2004 to nearly 20% in 2007.

8.9 Conclusions

Canadians are an engaged Internet savvy constituency, particularly, though not exclusively, those under 30 years of age. Internet communications and text messaging via cell phones have become an integral part of daily interactions, albeit not yet reaching threshold levels of adoption that would make older communications channels obsolete. New applications have made it exceedingly easy to exchange a variety of different media. Some of these are using more and more bandwidth as users exchange increasingly larger amounts of rich media (photos, video and so on) on a regular and casual basis. Users are able to access desired information and entertainment ever more effortlessly and have access online to creative applications for self-expression.

Many Canadians routinely send their original media creations to the Internet. Text messaging is heading this way and, through IM technology, Canada appears to be a nation that is almost

constantly connected. While Internet telephony is not yet widely used, with the expansion of urban wireless services and the availability of phone handsets or other mobile devices that can utilize it, its use may grow. Many Canadians have replaced their printed atlases with Google Earth. Online services appear to be replacing the printed photo album for many people. Young Canadians search for answers on Wikipedia while other Canadians are certainly among those providing them. Canadians are making extensive use of digital download sites to acquire music (a trend examined more extensively in Chapter 10). A significant portion of the online population is publishing through some form of personal website. Internet media applications are an established part of Canadian's communications behaviour allowing us to communicate, collaborate, and accumulate the information we desire in an increasingly uncomplicated fashion.

9 Information, Entertainment, News and Learning on the Internet

9.1 Key Findings

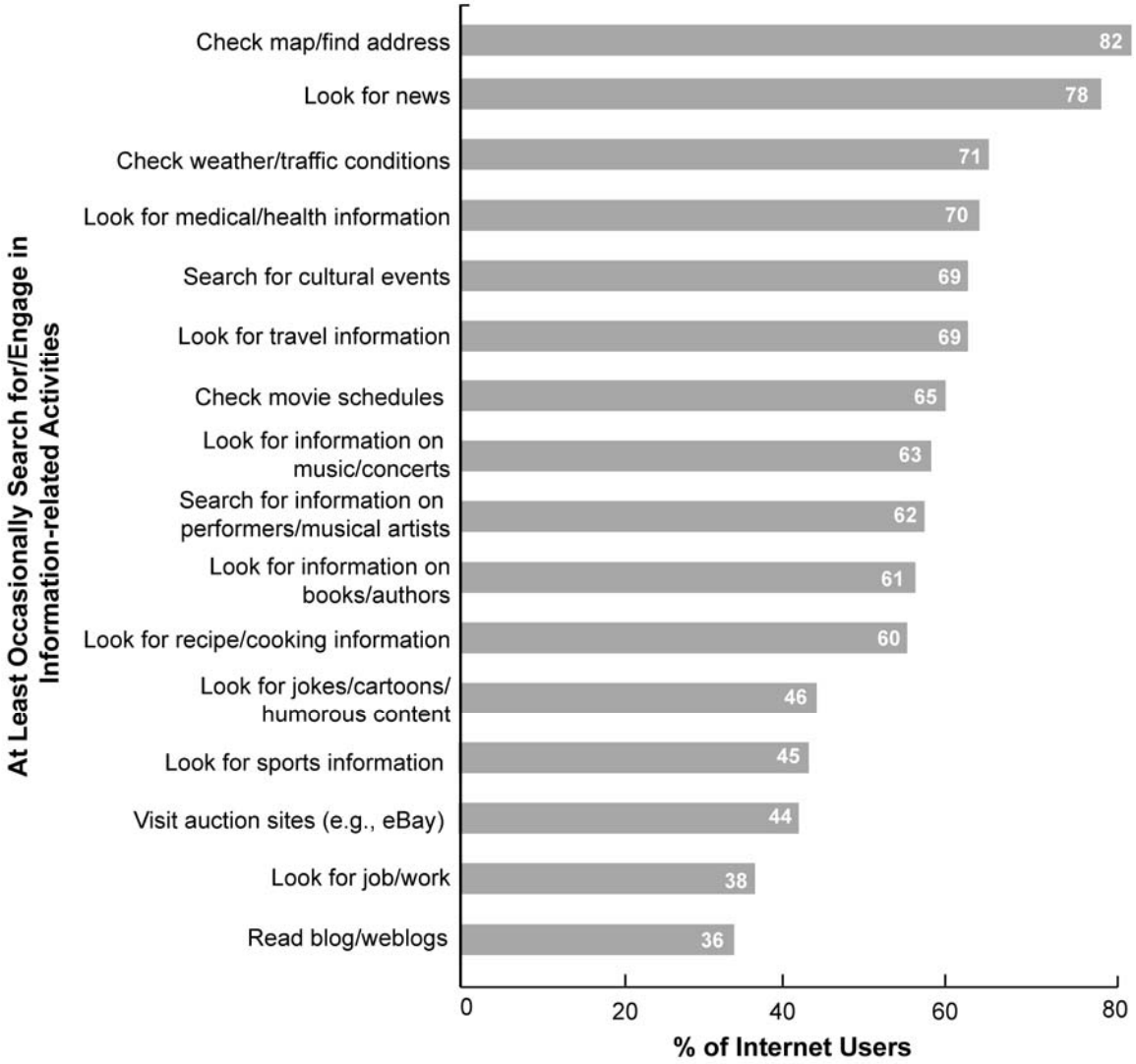
- Canadian Internet users make frequent use of search engines and many use them as home pages on their PCs
- The three most popular home pages for PCs are Google, MSN, and Yahoo; together, they account for 61% of the first pages viewed by Canadian Internet users when they access the Internet
- Canadians go online for a wide range of information activities. The most popular sites visited for information purposes are those that offer practical information, such as maps, addresses, news, weather and traffic
- Experienced, heavy Internet users with higher levels of education are most likely to visit information-related sites
- A large proportion of Canadian Internet users (79%) regularly go online to look for local, national or international news
- A majority of Internet users (78%) feel offline newspapers are a trusted source of news
- Younger Canadians (aged 12–29) spend less time reading traditional printed newspapers than do older Canadians, but visit online news sites more frequently
- Three of the most popular news sites visited by Internet users are Canadian
- The most popular news websites for English-speaking Internet users are cbc.ca (mentioned by 23% of online news users), MSN (13 %) and CNN (12%)
- The most popular news websites among Francophone Internet users are Radio Canada (26%), Canoe (25%) and Cyberpresse (14%), all Quebec-based websites
- The news websites favoured by youth (aged 12–17) are not significantly different from those preferred by adults
- Nine out of ten Canadian Internet users engage in non-specific Internet surfing/browsing at least occasionally
- Downloading and listening to music online is the most popular entertainment-related activity, undertaken by more than half of all Internet users (56%)
- Other popular online entertainment activities include playing games, visiting television program websites, downloading/watching videos and listening to the radio
- Youth are twice as likely as adults to use the Internet for three prominent entertainment activities: playing games (85% versus 37%), downloading/watching videos (79% versus 35%) and downloading/watching movies (39% versus 18%)
- A high percentage of Canadian Internet users go online to search for various types of information
- The number of Internet users visiting various entertainment-related websites has increased significantly since 2004
- Although information seeking continues to predominate as a reason for going online, entertainment is becoming more important
- One in five Internet users participates in formal distance learning online
- Three in four members of the youth sample (aged 12–17) regard the Internet as important for their school work

9.2 Information-related Search and Activities Online

The Internet emerged initially as a network for the communication and dissemination of information. While it has developed a much wider range of functions over the past several years,

information-related activities remain most important to the vast majority of Internet users. As Figure 9-1 demonstrates, Canadians engage in a wide range of these endeavours while online. While sites that deliver entertainment activities are becoming more popular, so are sites that provide information about offline entertainment.

Figure 9-1 Searching for and engaging in information-related Internet activities



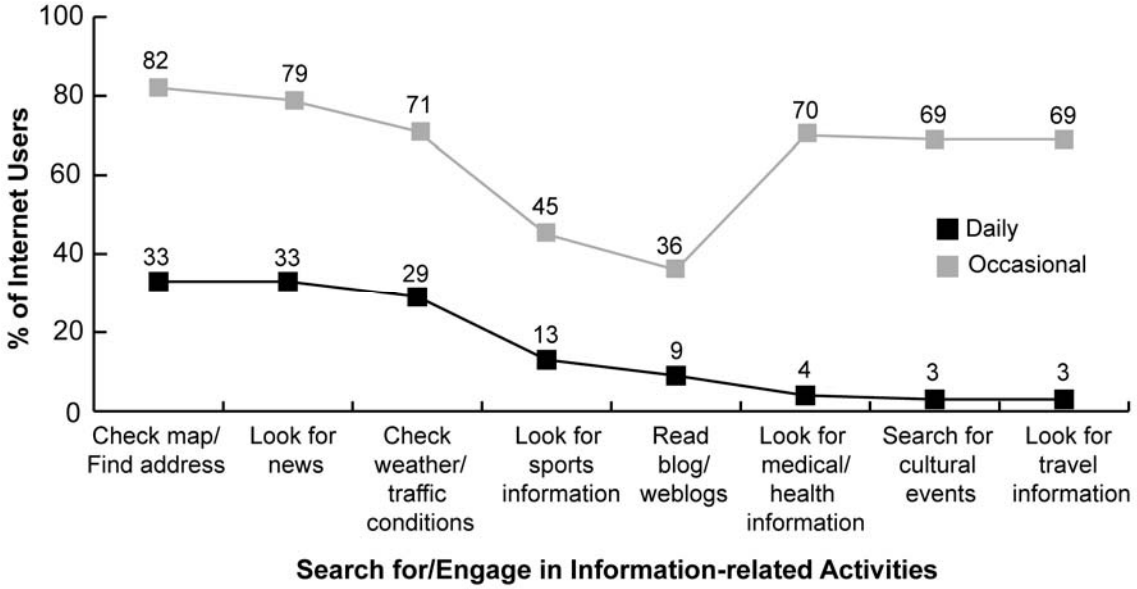
CIP 2007 — C2.123F–138F (Internet user respondents, 12 years +, n=2373)

The most pervasive uses of the Internet for information activities are to check maps or addresses and to consult local, national or international news. About seven in ten respondents go online for weather or traffic information, medical or health information, information on cultural events such as festivals, art exhibits, museums or theatre, or travel information. Nearly as many cited the Internet as a source of information for movies, music and concerts, performers and musical artists, books and authors, and recipes and cooking. Just under half go for humorous content such as jokes and cartoons, sports information, and participation in auction sites such as eBay.

Internet logs or blogs are also visited by more than one-third of users. Even more specialized sites, like job and work placement sites, are visited by more than one in three Canadian Internet users.

Some of these information-related activities are, of course, used more frequently than others. The percentage of Internet users who go online daily for specific kinds of information is set out in Figure 9-2.

Figure 9-2 Searching for and engaging in information-related Internet activities: Daily versus occasional use



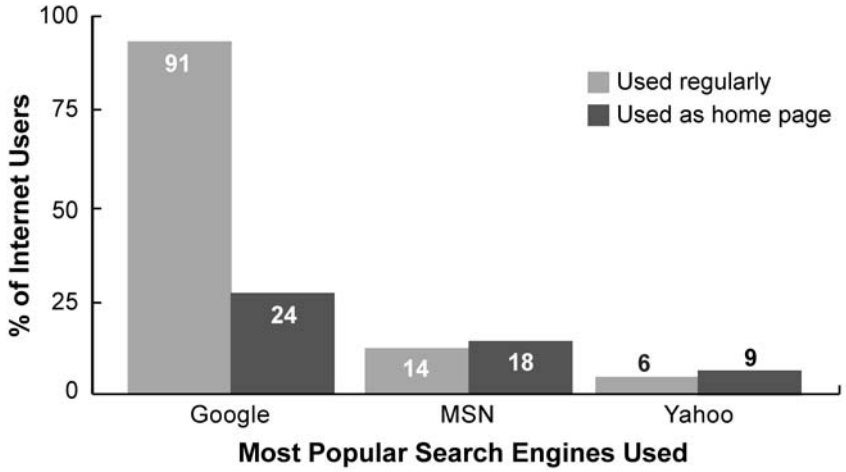
CIP 2007 — C2.123F–138F (Internet user respondents, 12 years +, n=2373)

Map and weather information is accessed fairly regularly. Most users do not visit any information-related site on a daily basis, with the exception of hard-core sports fans and bloggers. About 13% of Internet users — mostly males — look for sports information online every day and about 9% read at least one blog every day. Information about health or medicine, cultural events and travel appears to be sought out on an as-needed basis.

It is noteworthy that most popular information-related sites provide information once available primarily in traditional news media. However, the online services have the powerful advantages of searchability and customization, as well as convenience. Internet users go to many different sites for information and, often, just to see what is new. However, general news remains important to many Internet users. Nearly one in three adult Internet users checks news at least daily.

In addition, the popularity of information seeking online is demonstrated by the widespread use of search engines. Nearly all Internet users have used a search engine (96%) and more than half use one at least daily. As Figure 9-3 indicates, Google is the search engine used most often (91%). In fact, more than one in three Canadian Internet users have adopted Google as their home page (the first page that comes up when the Internet is first accessed). MSN is the home page for 18% of users while Yahoo, the third most popular search engine, is the home page for 9% of Internet users.

Figure 9-3 Search engine used most regularly and as a home page



CIP 2007 — C2.094m1–Tc, C2.176m1–m3 (Internet user respondents, 12 years +, n=1913/2233)

When considering age, Yahoo is mentioned as a prevalent search engine by 22% of Internet users over 65 years of age, but only by 7% of those 12–17 years of age. Google (41%) and MSN (25%) are the most popular home pages among youth. All search engines are popular as home pages across all ages, but older Internet users (55 years and older) are considerably less inclined to adopt search engines as the page first viewed online. Only about 40% of those over 65 years of age, for example, use one of three most common home pages (which are also search engines).

Most search engines used as home pages provide news summaries that, it is reasonable to assume, influence the news and information consulted by Internet users. Prominent search engines are also known as news compilers, or aggregators, since their news summaries are based on reports from established news organizations. These home pages can be customized by those who adopt them, but most users accept what appears.

9.3 Importance and Reliability of Information Sources

Chapter 7 discussed both the importance and perceived reliability of information sources across various subgroups. This section looks more closely at the perceived credibility of online sources.

As shown in Table 9-1, the most important sources for information are considered to be interpersonal contacts (66%), the Internet (55%) and television (51%). Most traditional media are also considered important by almost half of all respondents. Nearly two in three Canadian Internet users rank the Internet as an important or very important source of information. In contrast, younger respondents regard interpersonal sources and the Internet as more important sources for information, relying less on traditional media.

When it comes to reliability of information, the Internet does not inspire as much confidence as do traditional sources. As Table 9-2 shows, only about one-third of Internet users believe that most or all of the information on the Internet is reliable, considerably less than newspapers, which are trusted by more than 60% of Canadian Internet users. Information on television has about the same credibility as online information.

Table 9-1 Perceived importance of interpersonal sources and various media for information across Internet user and age categories

Media/Interpersonal Sources	Ranking of "Very Important" and "Important" as Information Source				
	All respondents	Internet users	Internet non-users	Youth (12–17)	Young adults (18–29)
	%	%	%	%	%
Interpersonal sources	66	65	67	58	73
Internet	55	67	10	71	70
Television	51	50	58	46	45
Newspapers	47	47	46	27	40
Books	46	47	43	42	44
Radio	46	45	48	25	36
Magazines	22	21	22	15	15

CIP 2007 — C2.043a–49a (All respondents, 12 years +, n=3035)

Table 9-2 Perceived reliability of various media sources for information across Internet user and age categories

Reliability of Media Source	Percentage of Respondents		
	Most or all of it	Half or less of it	None
	%	%	%
All respondents			
Information on the Internet	34	64	2
Information on television	38	60	2
Information in newspapers	58	39	2
Internet users			
Information on the Internet	36	63	1
Information on television	38	60	2
Information in newspapers	61	38	1
Internet non-users			
Information on the Internet	24	65	11
Information on television	36	62	2
Information in newspapers	47	50	3

Reliability of Media Source	Percentage of Respondents		
	Most or all of it	Half or less of it	None
	%	%	%
Youth (12–17)			
Information on the Internet	32	67	1
Information on television	47	52	1
Information in newspapers	72	27	1
Young adults (18–29)			
Information on the Internet	31	68	1
Information on television	37	60	3
Information in newspapers	64	36	-1

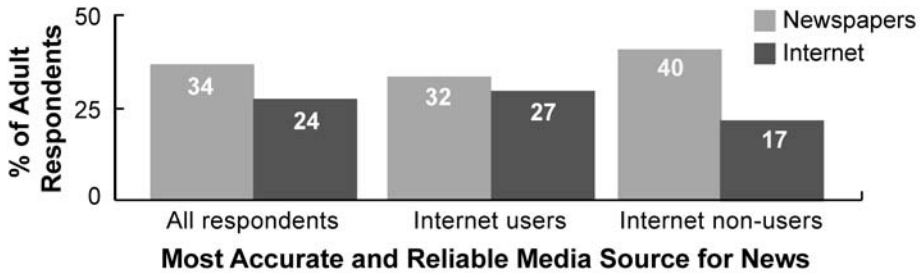
CIP 2007 — C2.067a–069a x demographic variables (All respondents, 12 years +, n=2998)

Note:
- In these comparisons, some totals may not add to 100% due to rounding.

9.4 Newspapers and the Internet

Figure 9-4 provides an informative comparison of newspapers and the Internet. Asked to specifically compare the accuracy and reliability of information on the Internet and in newspapers, one in three Canadians (34%) considered newspapers to be more reliable, while one in four opted for the Internet (24%). Internet users were more likely to favour the Internet (27% versus 17% for non-users), but a plurality of Internet users (32%) considered newspapers more reliable. More experienced and frequent users of the Internet are more likely than others to express confidence in online information, but newspapers still hold the confidence of even committed Internet users.

Figure 9-4 Considered most accurate and reliable media source for news: Newspapers versus the Internet



CIP 2007 — C2.239a (All respondents, 18 years +, n=2662)

Also noteworthy, respondents were asked whether they had stopped subscribing to a newspaper or magazine since receiving similar content online. Of all adult respondents, 16% reported that this was the case, while the majority — 46% — had not cancelled a subscription.

As the analysis demonstrates, newspapers are still important and trusted news sources for many Canadians, including those who go online for local, national and international news. About 62% of Canadians or 78% of Canadian Internet users go online for news at least sometimes. Nearly four out of five Canadian adults read a printed newspaper at least once a week and many do so more often. Internet users are as likely as non-users to consult a printed newspaper.

The average time spent reading a newspaper in a typical week by those who actually read them is 3.6 hours. There are, however, major differences in newspaper use across age groups. As Table 9-3 illustrates, compared to other age groups, youth and young adults (12–29) are less likely to read a newspaper offline and they also spend less time doing so.

Internet users spend almost one hour less reading a newspaper in an average week than do non-users, likely because at least a portion of Internet users have shifted some of the time they previously spent with news to online sources (Internet users: 3.2 hours versus non-users: 4.1 hours per week). However, as reported above, only 16% of those online reported having stopped a newspaper or magazine subscription because the content was available online. This figure rises to about 20% for experienced and heavy Internet users.

Table 9-3 Proportion of newspaper readers and time spent reading across age categories

Newspaper Readership	All Respondents and Groups by Age					
	All respondents	12–17	18–29	30–44	45–59	60+
Newspaper readers (%)	78	59	78	85	85	85
Time spent reading newspaper in a typical week (hours/week)	3.6	1.2	2.5	2.7	3.5	5.2

C2.032F–032SS x C2.261a (All respondents, 12 years +, n=2334)

Higher levels of time spent reading newspapers in an average week are found among Anglophones (3.6 hours per week) compared to Francophones (2.8 hours). Gender, education, years of experience and amount of time spent online do not significantly impact offline newspaper consumption.

9.5 Most Popular News Sites Online

Internet users who at least occasionally look for news on the Internet were asked to declare their favourite news websites. Overall, consumers of online news tend to go the websites of established news organizations. Table 9-4 provides a breakdown of news sites most often visited across all Internet users, Anglophones, Francophones and youth. Given the existence of two distinct media systems in Canada — English and French — it is not surprising that there is little overlap in the most popular news websites visited by the two language groups.

Among English-speaking online news users, more than one in five mentioned the CBC's English language website (cbc.ca) as a news source. The cbc.ca website is the only wholly Canadian-owned news website among the top four news websites reported as most popular. Following cbc.ca in terms of popularity are the MSN, CNN and Google portals. CTV represents the fifth most popular news site for Anglophones, ranking much higher than in 2004. The two most

internationally popular search engine sites — Google and Yahoo — are also among the news websites most often mentioned, as is the Globe and Mail.

Table 9-4 News websites most often visited across language and youth categories

News Website	Percentage of Internet Users Who Visit News Websites			
	All respondents	Anglophones	Francophones	Youth (12–17)
	%	%	%	%
cbc.ca	19	23	6	14
MSN	13	14	7	21
cnn.com	11	12	6	7
Google	10	10	25	15
canoe.com	9	5	7	9
yahoo.com	9	9	6	8
ctv.ca	7	9	2	3
Globe and Mail	7	8	2	2
bbc.com	6	6	2	2
Radio Canada	5	-1	25	5
Toronto Star	4	5	-1	4
Sympatico	3	2	9	4
Canada.com	3	3	1	—
cyberpresse.ca	3	-1	13	—
Reuters	1	-1	3	—

C2.139m1–o3 (Internet users who visit news websites, 12 years +, n=1466)

Looking more closely at Francophone use of news websites, two key players dominate to a degree not found among Anglophone Canadians. Approximately one-quarter of Francophones surveyed reported they use the canoe.com and radio-canada.ca websites to obtain news. This mirrors the dominance of the CBC in predominantly English-speaking regions of Canada. Radio-Canada — the French language public broadcaster — and Quebecor media are the dominant online news organizations in Quebec.

Another frequently mentioned site, cyberpresse.ca, is the French-language website of the Montreal newspaper La Presse. The bilingual Internet portal and Internet service provider Sympatico is mentioned by just under one in ten Francophones as a news source. It is important to note, however, that Sympatico also uses the MSN brand in Canada, and may therefore be regarded as the same site by Internet users. The only non-Canadian, English-language website in the top five most popular online news sites is Google.

Other new websites used by Francophones include a mix of portals, search engines and foreign sources, all of which were mentioned by relatively few respondents. There is only one predominant English-language Canadian news site used by Francophones, and that is cbc.ca, mentioned by just over one in 20.

Among Canadian youth who use the Internet for news, about one in five mention MSN as their most likely destination. The next most popular news website for youth is the search engine, Google. The degree to which youth access these sites is significantly higher than among the overall population. However, youth also show a preference for two key English- and French-language established media sites: cbc.ca and canoe.com.

Other more popular news sites for youth include cnn.com and four Canadian sites: Radio-Canada, Sympatico, Toronto Star and ctv.ca. Evidently, significant numbers of Canadian young people are seeking out news on the Internet and are using traditional Canadian journalistic online sources favoured by the population in general.

It is important to note that Internet users, especially younger users, also seek news from blogs and social networking sites. Nevertheless, the overall pattern of news use, both online and offline, appears to suggest that younger users still use mainstream news organizations to complement news found elsewhere.

Internet users who visit cbc.ca and radio-canada.ca tend to have more formal education and are from higher household incomes than those who favour private sector news sites. They also tend to be heavier and more experienced users of the Internet and to be slightly older. Women are somewhat more likely than men to go to ctv.ca. Except for household income, differences across demographic categories are not statistically significant.

9.6 Entertainment-related Search and Activities Online

Over the past decade, the range of entertainment sites available online has increased substantially and the image of the Internet as an instrument primarily for information and communication has shifted noticeably. While accessing information remains an important use of the Internet, entertainment activities online have grown coincidentally with the deployment of broadband. Some of the most popular entertainment-related online activities are outlined in Figure 9-5.

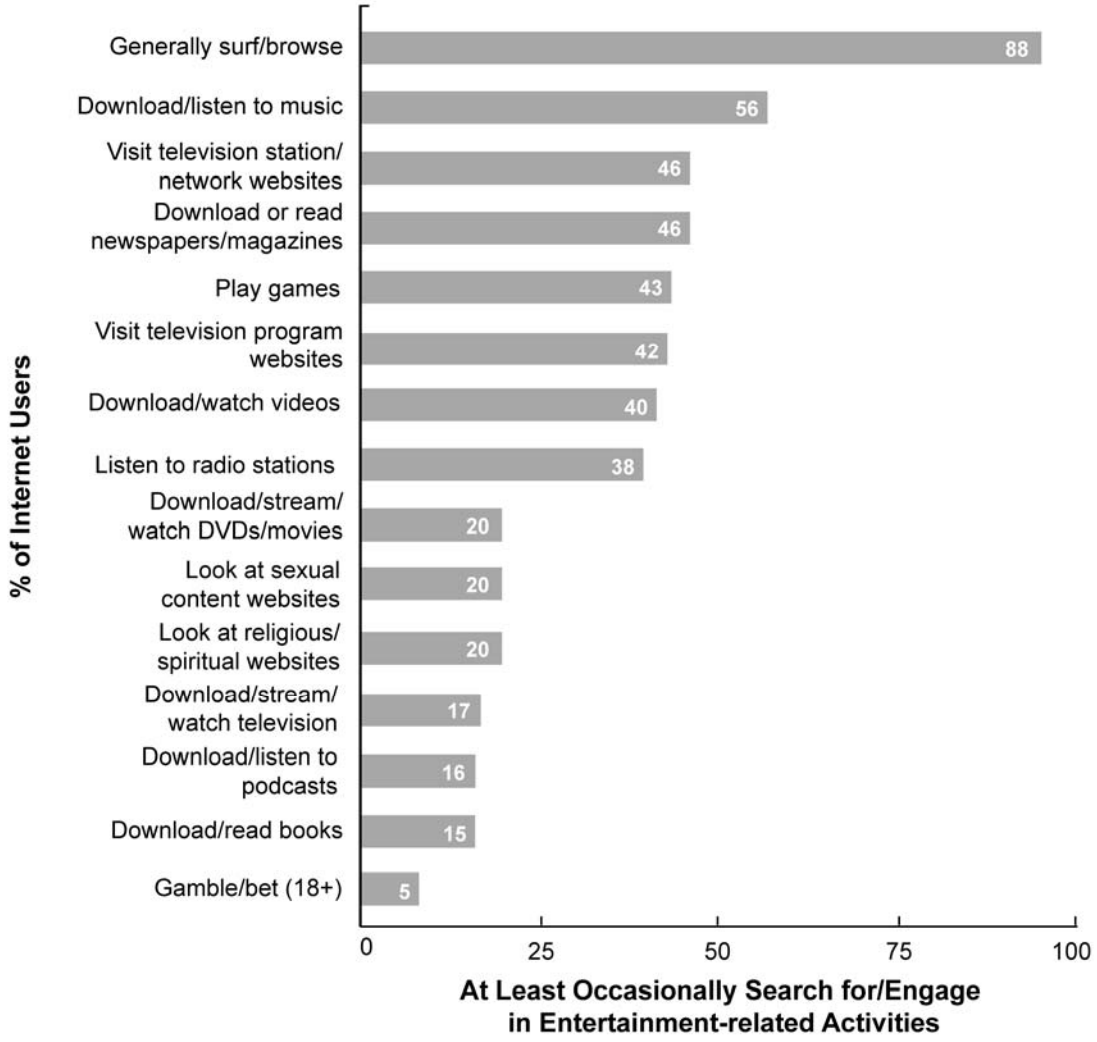
About nine in ten Canadian Internet users say they at least occasionally generally surf or browse the Internet. While surfing the Internet is almost universal, there is a clear gap between this practice and engaging in more specific entertainment-based activities. As discussed elsewhere in this report, surfing is considered here as mostly an activity for personal enjoyment, in contrast to more instrumental uses of the Internet.

Approximately half of Internet users in Canada indicate that they at least occasionally download or listen to music on the Internet, visit local or network television websites, or download/read newspapers and magazines.

Around four in ten respondents report playing games online, visiting individual television program websites, downloading/watching videos and listening to radio stations online.

Only one in five adult Internet users report to occasionally downloading, streaming or watching movies online, looking at sites with sexual content or viewing pornography. A similar proportion of adults online say that they visit religious or spiritual websites.

Figure 9-5 Searching for and engaging in entertainment-related Internet activities



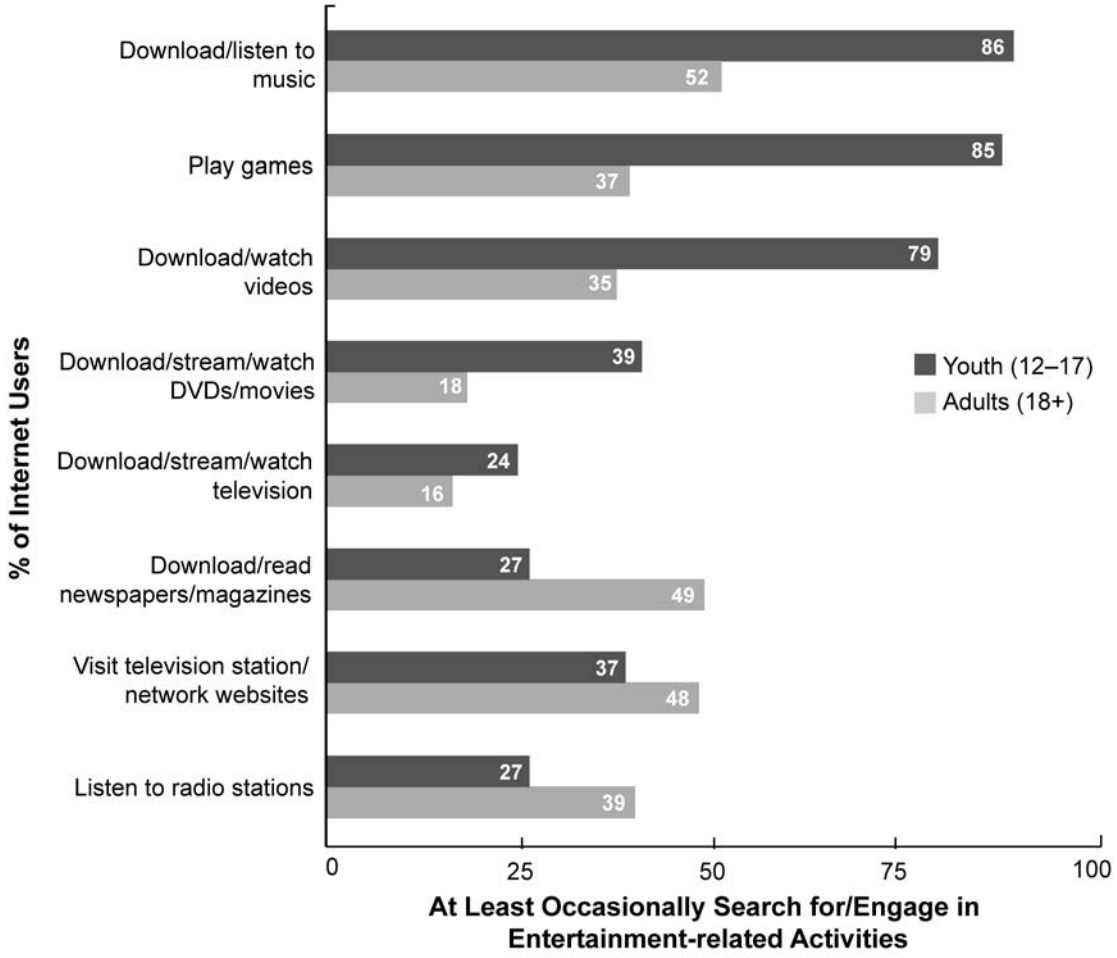
CIP 2007 — C2.140F–154F (Internet user respondents, 12 years +, n=2372)

The more sophisticated applications, which require high-speed broadband or other technological enhancements, are used by fewer than one in five Internet users. Only one in 20 Canadian adult Internet users report occasionally betting, gambling or entering lotteries online.[10]

The differences between younger and older Internet users with respect to entertainment activities are revealing. Figure 9-6 provides the study's findings across several key online entertainment activities where statistically significant differences in engagement between youth and adults were found.

[10] Note that the Internet pornography and gambling questions were asked only of adults.

Figure 9-6 **Searching for and engaging in entertainment-related Internet activities: Youth versus adults**



CIP 2007 — C2.140MF–154F (Internet user respondents, 12 years +, n=2372)

Although just under half of adult Internet users say they at least occasionally listen to music and play games online, among youth this figure rises to 86% and 85% respectively. As well, almost eight in ten Canadian youth (aged 12–17) report having downloaded and watched videos from the Internet compared to only 35% of the adult population. Similar differences in engagement between youth and adults are also found for downloading or watching DVDs/movies and television online, although the level of engagement for both youth and adults is far less than for other entertainment-related activities.

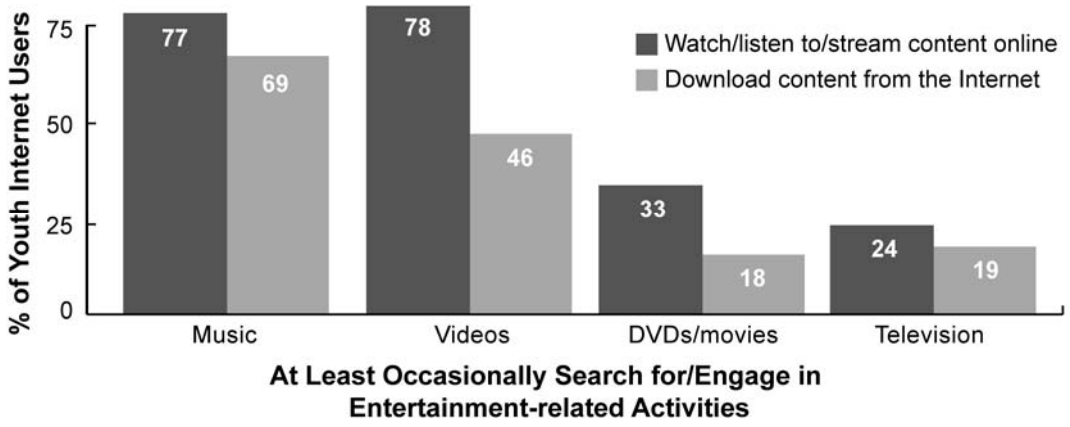
Consistent with conventional media adoption discussed in Chapter 6, compared to youth, adults appear to have more interest in and dependency on traditional media, as indicated in their greater use of these media online. Online access to newspaper, television and radio websites is at far higher levels for adults than for youth.

These results suggest a clear sense of “leading edge” activity among youth in terms of their entertainment interests as compared to adults. Older Internet users are more likely to access traditional media both offline and online than are youth. In contrast, the 12–17 age group engages more with online entertainment sources. Older Internet users remain tied to and rely more on conventional media than do youth, and more prolifically seek out traditional sources online. Level

of engagement for youth clearly demonstrates changing patterns in use of entertainment online, which will most likely continue in the future. It will be most interesting to track the behaviour of youth as they grow older to see if their consumption and attraction patterns remain consistent over time.

Even more noteworthy is the differences found in the level of engagement online — specifically differences between acts of watching or streaming content and downloading content. A number of the survey questions posed to youth specifically addressed the frequency of watching or streaming content online compared to physically downloading similar material. The purpose in separately asking about these behaviours was to identify key areas where youth may be using the Internet as something more than a conventional channel to just watch, listen or engage with content. Downloading provides more opportunity for time shifting and sharing content. These findings may shed light on the extent to which youth have also embraced the Internet as a distribution conduit for entertainment-related content. The results are shown below in Figure 9-7.

Figure 9-7 Searching for and engaging in entertainment-related Internet activities: Streaming versus downloading content by youth



CIP 2007 — C2.140MF–154F (Internet user respondents, 12–17 years, n=2372)

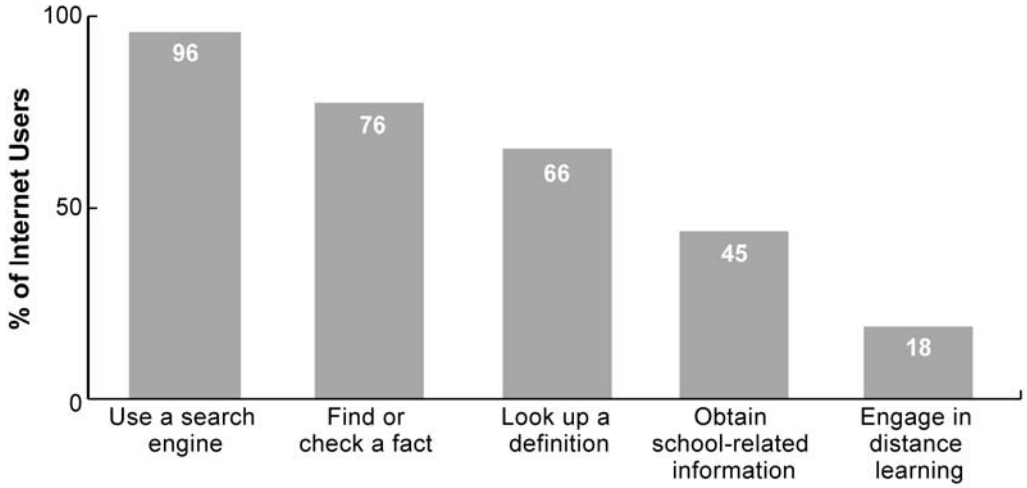
As expected, youth frequently use the Internet to consume selected media online. In particular, listening to music and watching videos on the Internet are more prevalent for youth than are other activities and for other age groups. While downloading practices across all media examined are less common than acts of watching or listening to media, in all cases, more than half of youth who use various media online also download content while online. Compared to other age groups, youth's penetration levels are considerably higher for downloading music (69%) and videos (46%) versus DVDs and movies (18%) and television (19%). While downloading of video content by youth is relatively modest, overall adoption levels (streaming and downloading combined) for these media still surpasses that of the adult population.

The findings indicate that youth continue to enjoy a balance of entertainment activities and engagement online. While the rate at which youth download content indicates a growing functionality of the Internet as a distribution conduit — particularly for music — youth also exhibit greater adoption of content through simply watching, listening and streaming it while online.

9.7 Online Learning

In addition to information and entertainment activities, Canadian Internet users were asked about their use of the Internet for learning — either informal learning or more formal education-related activities.

Figure 9-8 Searching for and engaging in Internet activities for online learning



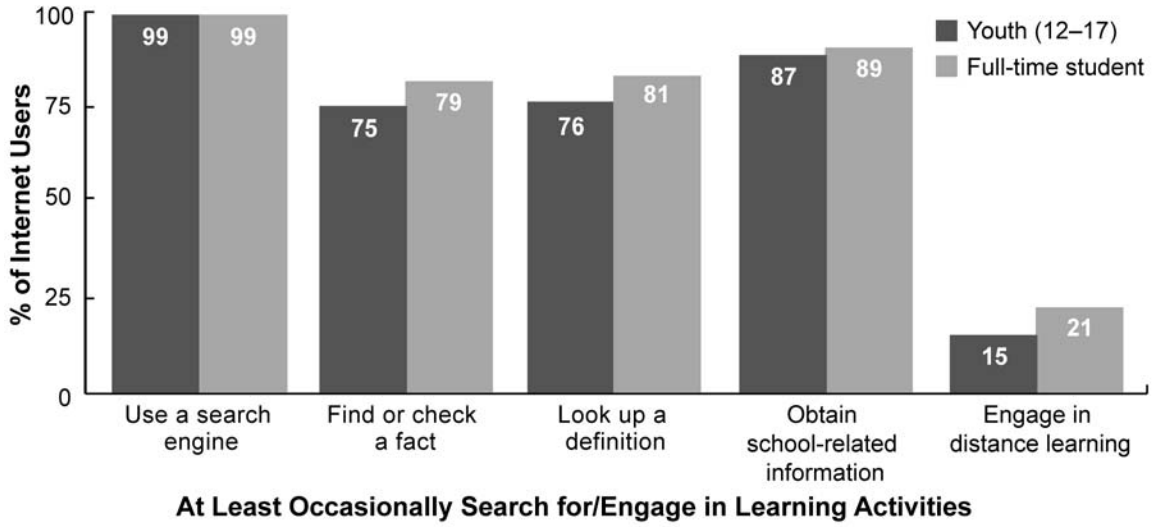
CIP 2007 — C2.155F–159F (Internet user respondents, 12 years +, n=2371)

As is evident in Figure 9-8, almost all users find an occasion to use Internet search engines such as Google, Yahoo and MSN. Three-quarters of those online also use the Internet to find or check a fact, and two-thirds to look up a definition. A relatively high proportion say that they at least occasionally get school-related information online whereas a surprisingly large group, almost one in five, say that they have used the Internet for some form of distance learning.

It is interesting to see how both the informal and more formal variants of online learning differ for youth (most of whom are in senior-public and high school) and full-time students (many but not all of whom are young adults). These results are shown in Figure 9-9.

In this study, both the youth and full-time student subgroups (which overlap) show higher levels of search engine activity than is found in the overall Internet population. Clearly though, the frequent use of search engines is not fundamentally related to formal education. The same is true for online fact checking, in which case full-time students are only slightly higher than average in their usage, and there is no statistically significant difference between the youth and adult samples. Using the Internet to check a definition may be an activity that formal schooling tends to favour, but not markedly.

Figure 9-9 Searching for and engaging in Internet activities for online learning: Youth versus full-time students



CIP 2007 — C2.155F–159F (Internet user respondents, 12 years +, n=2371)

The main distinction in Internet use among youth, full-time students and the general population, as might logically be expected, is in terms of accessing school-related information. For youth and full-time students, nine in ten engage in such activity at least occasionally — twice the level of the general population. The importance of the Internet as a tool for information gathering, research and learning for students is clear.

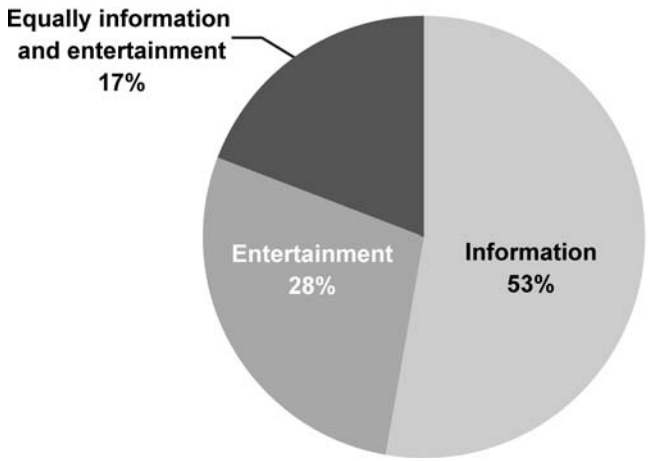
When asked how important the Internet is for school work, three in four youth respondents say the Internet is important for their school work while 37% of these respondents say it is very important. Francophone youth are less likely than English youth to regard the Internet as important for their school work and more likely to have no opinion on the subject.

Participation in formal distance learning is not confined to full-time students or youth. Nearly one in five Canadian Internet users is involved in some form of online class.

9.8 Primary Reason for Going Online: Information Versus Entertainment

Using a variety of measures, the results indicate that the primary motive for using the Internet continues to be for information purposes. When respondents were asked to declare the amount of time they spent using the Internet for information versus entertainment purposes, the average for all Internet users was 60% of time spent on information-related activities and 40% of time spent on entertainment-related activities. Similar findings resulted across measures that examined both the importance attributed to information versus entertainment activities, as well as the estimated amount of time spent engaged in each. In one measure, a scale was prepared including those who reported using the Internet predominantly for information (more than 50% of time spent), for entertainment (more than 50% of time spent), or equally for both. As can be seen in Figure 9-10, more than half of Canadian Internet users (53%) say they go online more regularly for information, while only 28% go online primarily for entertainment. One in five or 19% say they spend about the same amount of time online for each.

Figure 9-10 **Predominant type of activity engaged in while online: Seeking information versus entertainment**



CIP 2007 — C2.175T (Internet user respondents, 12 years +, n=2311)

There are important differences in what respondents reported as the most important reason for being online across divisions based on age, experience online, education and location of Internet use. These relationships are set out in Table 9-5.

Surprisingly, broadband access and level of engagement as expressed in time spent online do not affect these results. However, it was discovered that these two variables do have a strong influence on specific online activities, demonstrating a positive relationship with engagement for entertainment purposes. As previously noted, those who use higher speeds to connect to the Internet and spend more time online tend to engage more in entertainment activities. However, this does not appear to influence respondents' perception of why they are online — whether for information or for entertainment purposes — as assessed in this measure.

Age has the strongest influence on the reason why respondents go online. Internet users under 30 years of age are most likely to go online for entertainment, while nearly two-thirds of those over 30 give priority to information. Experience online also has a strong impact on perceived motivation for using the Internet. Users who have been online longer, together with those more educated, are more likely than other users to focus on information-related applications.

Location of Internet use has an interesting relationship with reason for going online. Information-related activities predominate at work and, to a lesser extent, at home, while entertainment uses are most common at school and at the homes of friends and relatives. Information is the primary motivation for respondents' use of the Internet in public places, though entertainment uses are also quite high in public places.

Overall, it appears that information seeking has become established as the predominant reason for going online for older and more experienced users, many of whom began using the Internet before the proliferation of entertainment opportunities. Newer users and those who are at a stage in life where entertainment is typically most important (i.e., youth and young adults) are more likely than others to go online seeking entertainment. This orientation may possibly continue as this group ages and moves into other life stages. Information will continue to be a staple of the Internet but entertainment appears to be emerging to represent a large component of the online experience for most users.

Table 9-5 Predominant type of activity engaged in while online: Seeking information versus entertainment across demographic and other variables

Demographic and Other Category	Information-seeking versus Entertainment-seeking While Online		
	Predominantly information	Equally information and entertainment	Predominantly entertainment
	%	%	%
Sample			
Youth (12–17)	15	28	57
Adult (18+)	58	18	23
Age			
12–17	15	28	57
18–29	36	21	43
30–44	62	17	21
45–59	68	16	16
60+	65	18	18
Education			
High school graduate or less	29	25	46
Attended college/university	56	18	26
University degree +	71	15	57
Experience online			
<6 years	42	23	35
6 –<10 years	44	18	37
10 –<15 years	62	17	21
15 years +	68	16	16
Location used for Internet access			
Home	52	20	29
Work	65	17	18
School	32	21	47
Friend/relative	37	22	42
Public place	49	19	32
Other location	61	20	20

CIP 2007 — C2.175T (Internet user respondents, 12 years +, n=2311)
Note: In these comparisons, some totals may not add to 100% due to rounding.

9.9 Trends: 2004 to 2007

Almost all of the online activities examined — both information- and entertainment based — showed significant increases in participation rates over the past few years. As outlined in Table 9-6 and 9-7, some categories, like accessing news online, increased only marginally. Others, such as attending online auctions or downloading movies, increased dramatically. The most relevant inference to be drawn from all these results is that the Internet is increasingly integrated into the everyday lives of current Internet users. The escalation in adoption of online content and services is driven by a number of factors, including proliferation of services and websites that are more user friendly and, for some activities, more convenient and accessible through high-speed broadband connectivity.

Table 9-6 Participation in selected online activities: 2004 to 2007

Online Activity	Percentage of Adult Internet Users		
	2004	2007	+ / -
	%	%	
Look for travel information	42	69	+ 27
Look for medical/health information	54	70	+ 16
Look for job/work	31	38	+ 7
Visit auction site (e.g., eBay)	13	44	+ 31
Look for recipe/cooking information	38	60	+ 22
Look for sports information	42	45	+ 3
Look for information on books/authors	33	65	+ 32
Look for information on music/concerts	43	63	+ 20
Check movie schedules	45	65	+ 20
Look for information on cultural events	39	69	+30
Download/read books	6	15	+ 9
Play games	23	43	+ 20
Download/listen to music	26	56	+ 30
Listen to radio stations	18	38	+ 20
Download/stream/watch DVDs/movies	4	20	+ 16
Engage in distance learning	12	18	+ 6

CIP 2004 — C1.086–100 (n=2163); CIP 2007 — C2.123F–138F, 140F–154F (Internet user respondents, 18 years +, n=2098)

The balance between information and entertainment as motives for going online has shifted somewhat since 2004. In the CIP benchmark survey, nearly two-thirds of Internet users spent more than half of their time online engaged in information-related applications. The proportion of users who go online predominantly for information declined to just over half in 2007. Those whose Internet use is predominantly for entertainment went up from 22% in 2004 to 28% in 2007. The number that divides their time equally also increased, from 13% to 19%. This means that the

proportion of Internet users who spend at least half their time online for entertainment purposes rose from 35% in 2004 to 47% in 2007.

As shown in Table 9-7, there has been a slight rise in adoption levels of adults who get news online since 2004. This can be attributed primarily to the increase in Internet penetration, as the percentage of those online who use the Internet to get news has remained about the same (approximately 80%). The proportion of users who regard the Internet as an important news source has risen slightly. The percentage of Internet users who regard newspapers as important has declined nearly 10% from 2004.

Table 9-7 Frequency of obtaining news from the Internet: 2004 to 2007

Frequency of Obtaining News Online	Percentage of Adult Internet Users		
	2004	2007	+ / -
	%	%	
Never	43	38	-5
At least sometimes	57	62	+5
Daily	24	27	+3
Once a week or more	17	13	-4
Less than weekly	10	18	+8

CIP 2004 — C1.082 (n=2162); CIP 2007 — C2.123F (Internet user respondents, 18 years +, n=2096)

The most dramatic changes in news website use since 2004 are the significant increases in the popularity of cbc.ca, ctv.ca and the Globe and Mail website. The mention of US-based sites remained stable or, in the case of MSN, declined in 2007 compared to 2004.

Table 9-8 Websites used for news by Anglophones and Francophones: 2004 to 2007

News Website	Percentage of Adult Internet Users — Anglophones	
	2004	2007
	%	%
n	*1483*	*1129*
cbc.ca	8	23
MSN	19	13
CNN	7	12
Google	4	10
ctv.ca	1	9
yahoo.com	10	9
Globe and Mail	4	8

News Website	Percentage of Adult Internet Users — Francophones	
	2004	2007
	%	%
n	*287*	*278*
Radio Canada	26	16
canoe.com	25	8
cyberpresse.ca	14	5
Sympatico	8	6
MSN	7	19
Google	6	5
yahoo.com	6	7

CIP 2004 — C1.083m1–m3; CIP 2007 — C2.139m1–m3 (Internet user respondents, 18 years +)

There has been little change in the perceived reliability of information on the Internet. In 2007, as in 2004, only about one in three Internet users regarded most or all of the information they find online to be reliable. The traditional printed newspaper continues to be a trusted source of news.

9.10 Conclusions

This overview of online activity shows the extent to which the Internet is an important information, entertainment and learning resource for Canadian Internet users. The incidence and frequency of virtually all activities has increased since 2004. For most online activities, only a minority of users participate on a daily basis, but a high proportion of users take part in several of these activities on regular basis and access others as required. Search engines are heavily used and Canadian Internet users in both official language groups make substantial use of online news provided by the English and French services of the CBC. The CTV and Canoe websites are also visited quite frequently. The newspaper and other traditional media are still important for Canadians, even as online activities increase.

More generally, the CIP analysis demonstrates the extent to which the Internet has become an important part of the everyday lives of a majority of Canadians. It is used for staying informed, looking up information, seeking out entertainment and connecting with the rest of the world. Increasingly, the Internet is being used for research and learning. The dramatic increase in entertainment-related time spent online, especially among youth, has important implications for both the online and offline culture and media industries, as does the increase in news consumption online.

10 Internet Use: Behaviour and Engagement

10.1 Key Findings

- Nearly 40% of Canadian Internet users have visited a community or social networking site, and almost one in four do so at least weekly
- While more than half of Internet users under 30 have visited a community or social networking site, one in five elder Canadians (60 years and older) has also done so
- Young adults are the most active contributors to these sites
- Social networking sites have greater appeal for English-speaking Canadians than for French-speaking Canadians (43% of Anglophones have visited compared to only 24% of Francophones)
- Younger users (under 45) and women visit social networking sites primarily to socialize; older users do so to obtain and share information
- Youth (12–17) visit community and social networking sites mostly in search of entertainment
- More than three in four Canadian Internet users browse online without a specific purpose, indicating that non-specific Internet use is frequently undertaken (especially among younger and heavier users)
- Downloading and especially streaming of music, online videos, movies and other media content are growing, particularly among younger users
- While only 13% of Canadian Internet users have paid to download online content, nearly 70% are willing to accept advertisements along with the content
- File sharing has been used by 23% of Internet users, but the incidence is much higher among the most active users
- Online newspapers have appeal to all age groups, and especially younger users, but do not seem to be replacing printed versions
- Online games are played by 37% across all Internet user age groups
- Online gaming is an important entertainment and social networking phenomenon
- Podcasting and reading or downloading online books remain minority activities
- Multi-tasking — doing something else while online — is quite common, and distinguishes the Internet from other media as requiring less focused attention; it is also more experiential than other media
- The most popular other activities undertaken while online are talking on the phone, watching television and listening to music or the radio
- Information remains the predominant reason for going online but entertainment seeking has grown considerably since 2004
- Most Internet users do not perceive that being online has reduced their offline media use, but between 18% and 25% see a decline in their use of one of the more common offline media
- Most Internet users do not think that being online has had an impact on their contact with friends and family
- Some users believe the Internet has increased their contact with friends and family, but decreased their face-to-face time, especially with family
- English-speaking users are much more likely than French-speaking users to use the Internet to increase their contacts with family, friends and others who share their interests
- Adults are much more likely than youth to worry about Internet safety issues but are generally confident that their children have the necessary skills to browse the Internet safely
- Although socializing when online is usually seen as a virtual phenomenon, screen sharing — being online with others present — is fairly common, especially among younger Internet users

- Adults report a much higher level of monitoring and participating in the online activities of teenagers than do the youth themselves
- The annoying and sometimes dangerous aspects of being online — receiving abusive e-mails, viruses, requests for funds from strangers, and so on — are experienced by many Canadian Internet users but most rely on their ISPs to combat them
- As noted in earlier chapters, since 2004 the number of hours per week spent online has increased for all age groups
- The data show increased use of established applications, such as those for communication and information seeking, as well as of new applications, such as community and social networks (used by 40% of those online)
- There has been an increased popularity of activities enabled or enhanced by broadband, including various forms of downloading and gaming
- Youth and young adults are going online more for entertainment than for information, but communication and information seeking are still the predominant uses of the Internet
- The data indicate that there has been some decline in offline media use, accompanied by a migration to online media use, but that the increased time online appears to come from a general reallocation of time, including some decline in time with family and, to a lesser extent, friends, rather than displacement of traditional media

10.2 Introduction

The spread of broadband and the advent of a wide array of user-friendly applications have brought some notable changes to the Internet since 2004. New forms of interactivity, social engagement and online creativity are encouraging Internet users, regardless of their technical skill levels, to experience the Internet in novel and creative ways. The primary attribute that distinguishes the new media from all others is that it allows active engagement and community through interactivity by providing applications that are accessible, ubiquitous and convenient. Sophisticated new online applications that respond to user's need for seamless, interactive connectivity and potential for even more participatory engagement continue to proliferate at an outstanding pace.

This chapter looks at specific applications that allow increased creativity, socializing and connectivity, with attention to patterns of use and attitudes. The 2007 CIP survey provides the data for original analysis of issues arising from file sharing, paid and free downloading, multi-tasking and creative uses of the Internet. This chapter specifically examines

- the importance of community and social networking sites and their relationship to social engagement
- users' increasing engagement in general browsing (going online without a specific destination)
- patterns of downloading and streaming activity, both paid for and free
- playing games online
- the implications of multi-tasking, or simultaneous media consumption
- the balance between information- and entertainment-seeking online
- the impact of Internet use on other media
- the influence of Internet use on other forms of interaction
- responses to some of the negative features of being online.

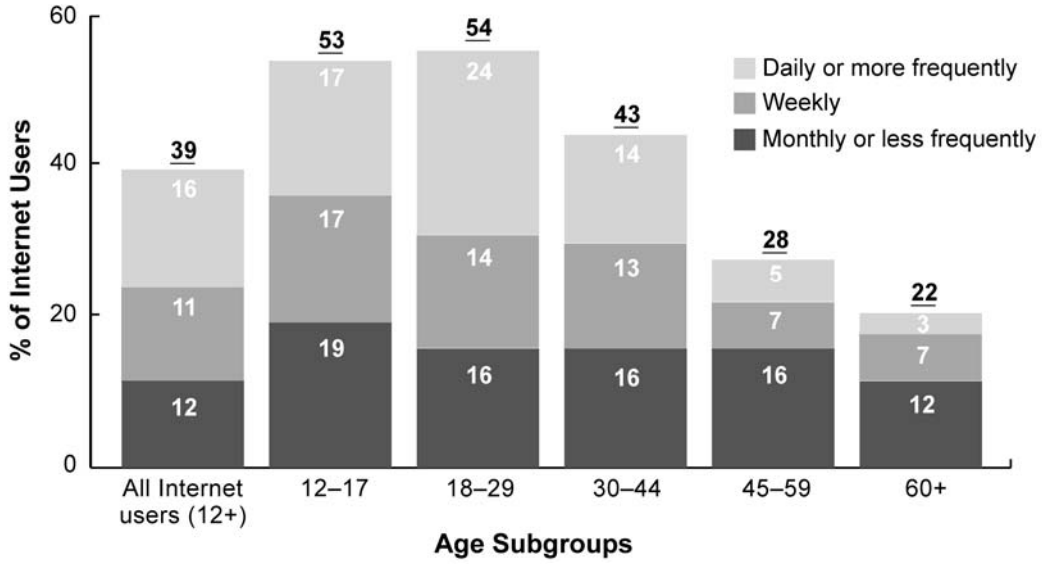
In addition, this chapter looks at differences between adults with children and youth in their household and the youth themselves in terms of their perceptions of Internet use and activities. These findings present interesting comparisons between what parents perceive children and youth in their household are doing, and the activities and attitudes reported by youth respondents.

10.3 Community and Social Networking Sites

The rise in popularity of community and social networking sites is a major development on the Internet since 2004. These sites are a forum whereby people can link with a range of virtual communities, predominantly social and professional in nature. Community and social networking sites may be seen as extensions of e-mail and especially IM, whereby Internet users can keep in touch with diverse groupings of people. More common sites, such as MySpace and Facebook, have emerged in the last few years as very popular and essential applications, particularly for youth and young adults. Facebook, launched in February 2004, was the most widely used social networking site in Canada in 2007, visited by 53% of Internet users who engage in community and social networks.

Nearly 40% of Canadian Internet users 12 years of age and older visit community or social networking sites and almost one in four do so at least weekly. As Figure 10-1 reveals, more than half of Internet users under 30 visit these sites and more than one in five elderly Internet users (aged 60 and older) also attend to the more popular sites. Young adults (18–29) are the most likely of all age groups surveyed to be frequent users. Nearly 40% of this group visit community and social networking sites at least weekly.

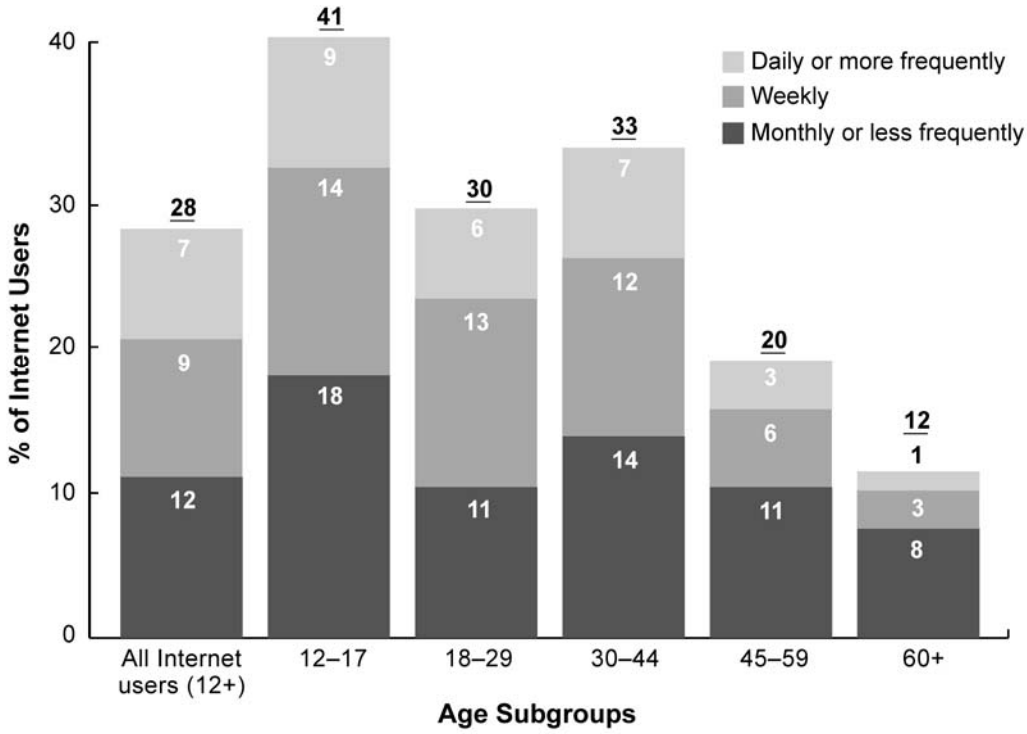
Figure 10-1 Proportion of Internet users who visit social networking sites, across age groups



CIP 2007 — C2.097 (Internet user respondents, 12 years +, n=2356)

Clearly, social networking sites have become an important part of the daily communication routines of many younger Canadians and a considerable number of older Internet users as well. In fact, a similar level of engagement is evident when distinguishing between those who visit and those who actually contribute to these sites. More that one in four Internet users have contributed to a social networking site and 16% do so weekly. As Figure 10-2 indicates, young adults are the most active contributors.

Figure 10-2 Proportion of Internet users who contribute to social networking sites, across age groups



CIP 2007 — C2.098 (Internet user respondents, 12 years +, n=2362)

The best predictor of both visiting and contributing to social networking sites is age, as noted above. With some exceptions, the propensity to visit these sites is fairly consistent across most demographic categories. However, there is a notable gap with respect to language differences: 43% of Anglophones visit social networking sites, compared to only 24% of Francophones. The divide is similar when it comes to contributing to these sites, with 32% of Anglophones doing so, compared to only 18% of Francophones.

Internet users who spend the most time online (15 hours or more per week) are more likely than others to visit (51%) and contribute (42%) to social networking sites. Broadband access and experience online are not strongly related to visiting these sites, but those with broadband (34%) and users who have been online for 15 years or more (39%) are among the more frequent contributors to social networking sites. Students are more likely than those in other life stages to visit (55%) and contribute (44%). The gender gap is relatively small. Those who contribute to community or social networking sites appear to be more fully engaged with the Internet than are those who simply visit.

Table 10-1 provides a summary of the most popular community and social networking sites used by selected age groups of Canadian Internet users. Facebook is the most popular site and is relatively popular with all ages. The second most popular site, Hi5, appeals mainly to adults, while YouTube is significantly more popular with youth (12–17) than with other age groups.

Table 10-1 Popular community and social networking sites, across age groups

Social/Community Networking Site	Percentage of Internet Users Who Visit Social Networking Sites, Across Age Groups			
	All Internet users (12+)	12–17	18–24	18+
	%	%	%	%
Facebook	53	55	65	52
Hi5	40	1	40	48
YouTube	14	26	15	11
MySpace	13	16	19	12
MSN	8	10	11	7
Hotmail	3	8	5	2
Community/city/local sites	3	2	0	4
Yahoo	3	1	2	4
Google	3	6	2	2

CIP 2007 — C2.104m1–o1 (Internet users who have visited a social networking site, 12 years +, n=746)

When asked about their reasons for visiting social networking sites, users reported a wide range of motives. The most common reason — to interact and socialize with friends and family — was mentioned by nearly one in four and was especially important for those under 45 years of age. As Table 10-2 shows, users over 45 were more likely than their younger counterparts to cite obtaining and sharing information as the most important reason for going to a community or social networking site. Internet users under 30 were the most likely of the age groups to cite fun or entertainment. These websites are providing many more opportunities for creative and social linking than those originally envisioned by their designers.

Motives for visiting social networking sites vary by gender and language. Females (46%) are much more likely than males (32%) to mention socializing as their primary reason for going to these sites. For youth (12–17), more than half of female users report socializing as their primary reason for visiting networking sites. French speakers who visit social networks mention obtaining information (41%) and fun (24%) as motives more often than English-speaking visitors (22% and 14% respectively). Conversely, socializing is mentioned as a reason for visiting social networking sites by only 19% of French speakers, compared to 43% of English speakers.

Among youth respondents, nearly half say that community and social networking sites are important to them personally; only 13% say they are not important. This form of interaction and community engagement has become much more important to Anglophones than to Francophones. While 54% of English-speaking youth regard these websites as important, only 20% of French speakers do.

Table 10-2 Reasons for visiting community and social networking sites, across age groups

Reason for Visiting Community/Social Networking Sites	Percentage of Internet Users Who Visit Social Networking Sites Across Age Groups					
	All Internet users (12+)	12–17	18–29	30–44	45–59	60+
n	*863*	*128*	*252*	*263*	*148*	*58*
Interact/socialize with family and friends	38	44	49	42	24	7
Share research or obtain information	24	11	17	28	35	40
Entertainment/fun	15	30	20	9	7	11
Share/express opinions	7	2	6	8	10	11
Find out about social/community events	6	5	4	7	8	10
Keep up to date	7	3	5	7	10	12

CIP 2007 — C2.105m1–m3 (Internet users who have visited a social networking site, 12 years +, n=2370)

Place of residence in Canada also appears to be a major factor in youth's perception of the importance of social networking sites. Young Internet users in Ontario are among the most likely in Canada to visit social networking sites (60%), contribute to them (47%) and regard them as useful and important (64%).

10.4 Social Networking Sites — Relationship to Social Engagement

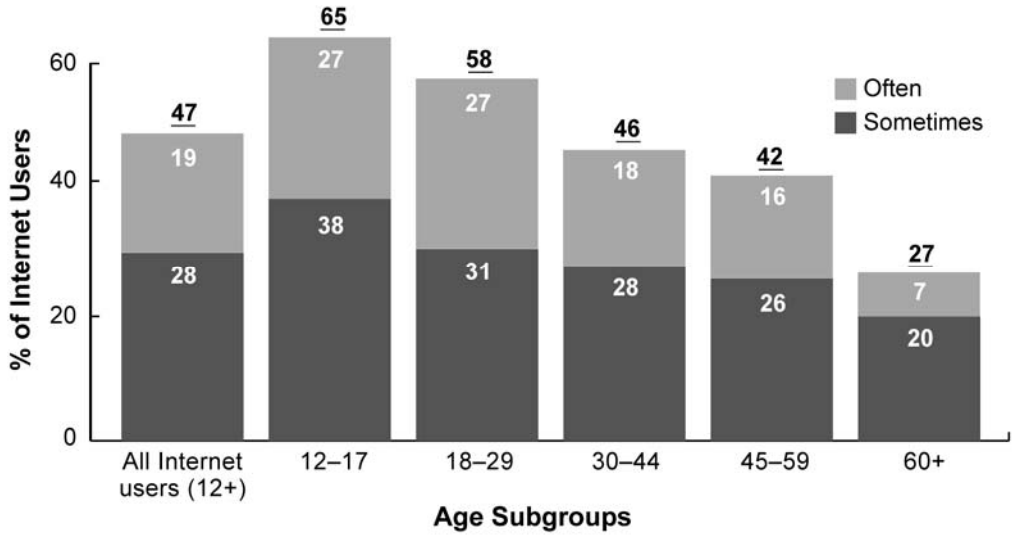
These findings indicate that social networks have been integrated into the lives of many Canadian Internet users. Some respondents expressed concern that their face-to-face interactions with family and friends are suffering as a result. Asked about the effects of using these sites, more than one in three youth respondents indicate that their offline interactions have been reduced as a result of accessing social networking sites. However, more than 80% of French-speaking users in the 12–17 age group and over 60% of English-speaking youth visitors report that their offline socializing is not at all affected by their use of social networking sites. Fewer than one in ten perceived a significant change. These data, alone, do not support the contention that social networking is leading to a significant change in offline social relations, even among younger Internet users. This is certainly an area that warrants further investigation in future studies.

10.5 Browsing Online Without a Specific Destination

Many of the study's findings raise questions as to whether the Internet should be considered simply as a medium to be compared with conventional media. The growth of novel online behaviours, such as surfing the Internet or browsing online without a specific destination, provides strong support for the hypothesis that the Internet is becoming more of a medium to be visited or experienced and less of an instrument to be used for narrowly focused tasks. The fact that more than three-quarters of Canadian Internet users browse the Internet without a specific destination in mind is a good indicator of this shift. Nearly half of Canadian Internet users go online without a specific destination sometimes (28%), often (19%). Another 30% do so seldom.

As Figure 10-3 illustrates, this behaviour is most common among younger Internet users. However, the practice of going online to experience the Internet without an intention to gather specific information or seek specific entertainment is still found across all age groups. Heavier Internet users are also more likely than lighter users to go online for non-specific reasons. This strong relationship with age and frequency of Internet use supports the notion that a shift in Internet user patterns is occurring along the normal diffusion path, with younger and heavier users leading the way.

Figure 10-3 Frequency of browsing the Internet without a specific destination, across age groups



CIP 2007 — C2.160 (Internet user respondents, 12 years +, n=2370)

10.6 Downloading and Streaming Media Activity

As will be seen when addressing trends, Canadians online are increasingly downloading and streaming audio and video from the Internet. For purposes of examining media consumption, downloading and streaming are treated here as part of the same process. However, it is important to recognize the differences between the two.

Downloading activity has been in existence since the advent of the Internet and refers simply to the transfer of files. Streaming is a method of transfer, as is downloading, except that the delivered file is played immediately and is never actually loaded or stored in its entirety on the receiving device. As most are aware, streaming is more immediate as files transferred using this method are decoded and consumed as a media experience in near real time through player software resident on the consumer's computer.

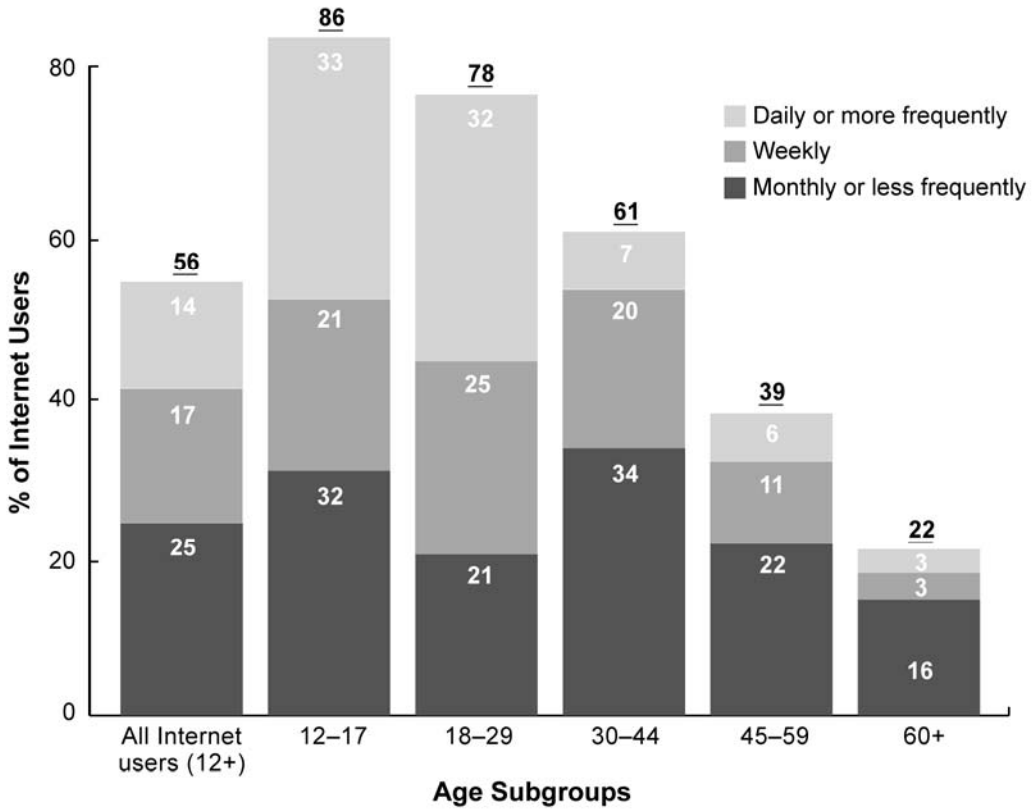
Downloading is a more time consuming process than is streaming. Even today, it can still take an excessive amount of time to download material like movies or television programs, rendered at a decent quality, using typical home broadband services now available.

Bandwidth is the single most important factor determining the timeliness of the arrival and processing of downloaded or streamed information. As more consumers employ even higher speed broadband connections and technically advanced computers on a mass scale, services that employ streaming technology will fulfill the immediacy requirement for interactive on-demand media and will most likely be the first choice among consumers.

10.6.1 Downloading and Streaming Music Online

Music is, to this point in time, the most popular type of cultural content downloaded or streamed. Indeed, the music industry has been substantially changed by file sharing and exchange of tracks online. Figure 10-4 provides a breakdown of the frequency with which various age groups access music files online.

Figure 10-4 Frequency of accessing music online, across age groups



CIP 2007 — C2.141M (Internet user respondents, 12 years +, n=2372)

As with other media, such as radio and CDs, younger Internet users are the most frequent consumers of popular music in all forms. Youth (12–17) and young adults (18–29) are the heaviest consumers of music online. Life stage is a related factor: 84% of Internet users that are students access music online and 70% do so at least weekly, much higher than other life stage categories (employed and retired). Overall, nearly one-third of Canadian Internet users listen to music online at least weekly.

Other good predictors of who accesses music online are having a broadband connection (64% listen online) and being a heavy Internet user (69%).

In addition, the CIP 2007 survey shows that

- 56% of Canadian Internet users (12 years +) download or listen to music online
- 52% of adults (18 years +) engage in these activities
- 86% of youth (12–17) engage in these activities
- 77% of youth listen to music online
- 69% of youth download music.

10.6.2 Downloading and Streaming Videos Online

Although video downloading could be accomplished with a dial-up modem, the increasing availability of high-speed broadband has made it much faster and more convenient. Without broadband, videos had for the most part to be viewed in tiny windows and in short-format lengths, as interstitials or components of full-length programs.

In 2005, YouTube revolutionized the online video experience. It became an aggregator of short form video content, making both uploading and downloading much easier. Since then a number of other technologies (e.g., Adobe, Brightcove, and so on), progressive increases in bandwidth to the home, and the introduction of more user-friendly media players have improved the experience immensely, and thereby increased its popularity.

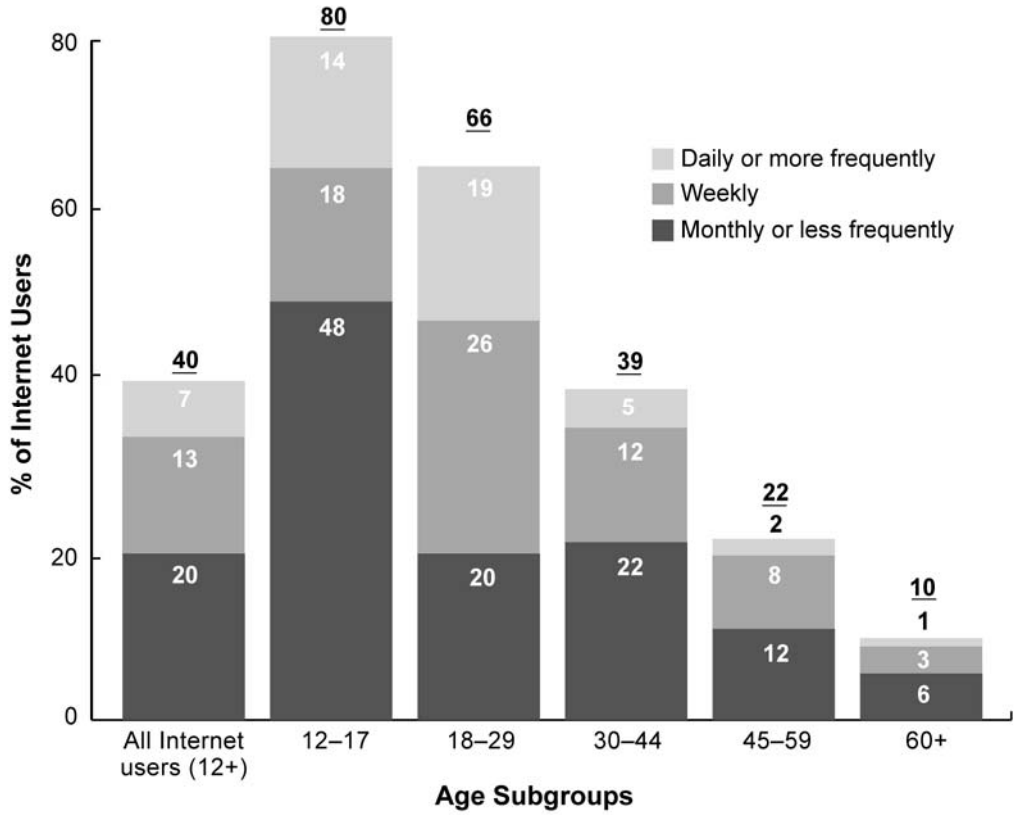
As these data show, a considerable number of Internet users are accessing videos online:

- 40% of Internet users access, download and/or watch online videos
- 35% of adults engage in these activities
- 80% of youth engage in downloading and/or watching videos online
- 46% of youth participate in specifically downloading videos
- 78% of youth specifically watch videos on the Internet.

As Figure 10-5 indicates, young adults are the most active consumers of videos online. In fact, nearly 20% of the 18–29 age group do so on at least a daily basis. As with most media applications, males are much more active than are females. More than half of male Internet users download or watch videos online, compared to 29% of females. Only 3% of females download or watch videos daily, compared to 12% of males.

As expected, those with broadband are much more active in accessing videos online than are those without (48% compared to 20%). Similarly, heavy Internet users (online 15 hours or more per week) are more engaged in online video accessing more often than are light users (56% versus 20% respectively). Those in smaller communities access videos online less often than do their urban counterparts, most likely because the former have limited broadband access.

Figure 10-5 Frequency of accessing videos online, across age groups



CIP 2007 — C2.142M (Internet user respondents, 12 years +, n=2372)

10.6.3 Downloading versus Streaming Video and Audio Content Online (Youth Only)

As streaming has become faster and more convenient, it would be expected that Internet users in the media-savvy youth sample might be streaming content more often than downloading it (and be aware of the difference). As Table 10-3 shows, this appears to be the case. Although downloading remains common, streaming is used more often. It is anticipated that, in future, there will be an even clearer distinction between streaming — using the Internet as a real-time medium — and downloading — using the Internet to access and record material for later use.

Table 10-3 Frequency of accessing music and videos online by youth: Downloading versus streaming

Downloaded or Streamed Content	Percentage of Youth Internet Users			
	Ever	Daily or more frequently	Weekly	Monthly or less frequently
	%	%	%	%
Download music online	69	25	27	16
Listen to/stream music online	77	37	22	19
Download videos online	46	9	13	23
Listen to/stream videos online	78	25	28	25

CIP 2007 — C2.141Y1/Y2–142Y1/Y2 (Internet user respondents, 12–17 years, n=276)

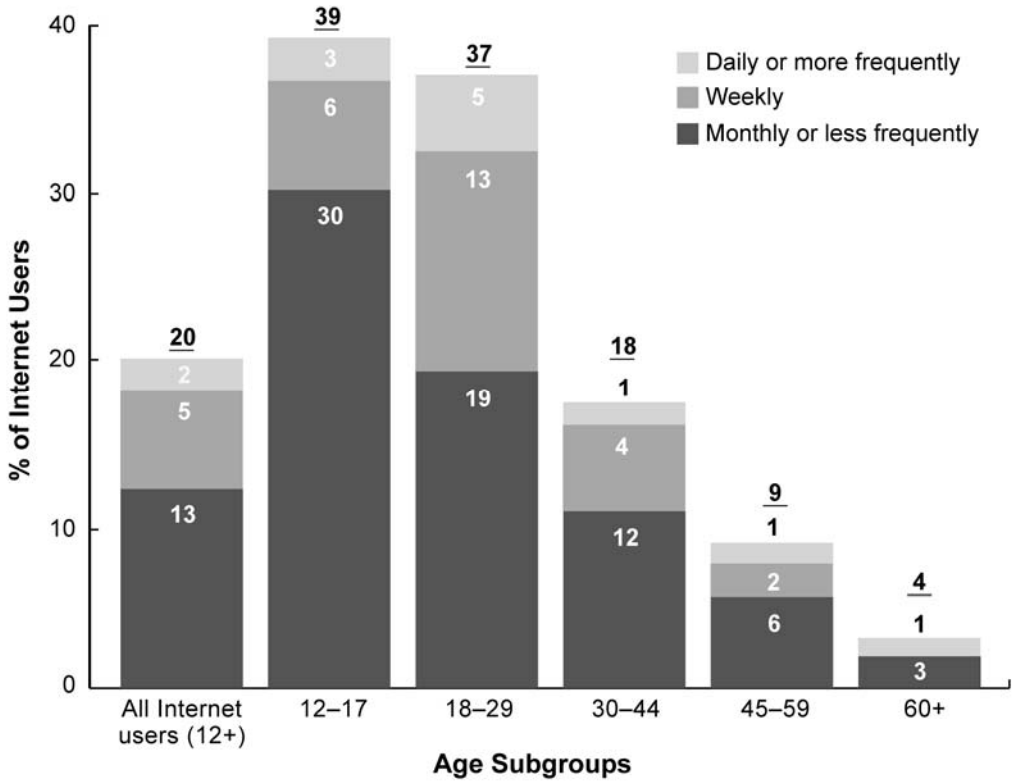
10.6.4 Downloading and Streaming Movies or DVDs Online (Long-form Content)

The fact that a much smaller percentage of Internet users watch movies online (20%) than access videos (40%) indicates clearly that most video viewing still takes the form of short videos and clips. As Figure 10-6 reveals, downloading and streaming of long-form content, such as feature length movies, is not a very frequent undertaking in any age group. However, the fact that 18% of the 18–29 group engage in this activity on at least a weekly basis is an indication of considerable potential for growth. As the Trends section in this chapter suggests, downloading and watching movies has grown substantially since 2004.

As for viewers of shorter clips, most of those who watch movies online (60%) are under 30 years of age. Now that commercial services are making online movies more accessible, it is expected that both downloading and streaming activities will increase, especially among younger Internet users.

Watching or streaming of movies or DVDs online is almost twice as common among youth as is downloading the same kinds of content, as Table 10-4 demonstrates. These data support the finding that watching online, as one might watch a television program, is a more frequent activity than is downloading for those in the youngest demographic of CIP respondents (12–17).

Figure 10-6 Frequency of accessing movies and DVDs online, across age groups



CIP 2007 — C2.148M (Internet user respondents, 12 years +, n=2368)

Table 10-4 Frequency of accessing movies and DVDs online by youth: Downloading versus streaming

Downloaded or Streamed Content	Percentage of Youth Internet Users			
	Ever	Daily or more frequently	Weekly	Monthly or less frequently
	%	%	%	%
Download movies/DVDs online	18	3	5	10
Watch/stream movies/DVDs online	33	4	8	21

CIP 2007 — C2.148Y1/Y2 (Internet user respondents, 12–17 years, n=274)

10.6.5 Downloading and Streaming Television Programming Online

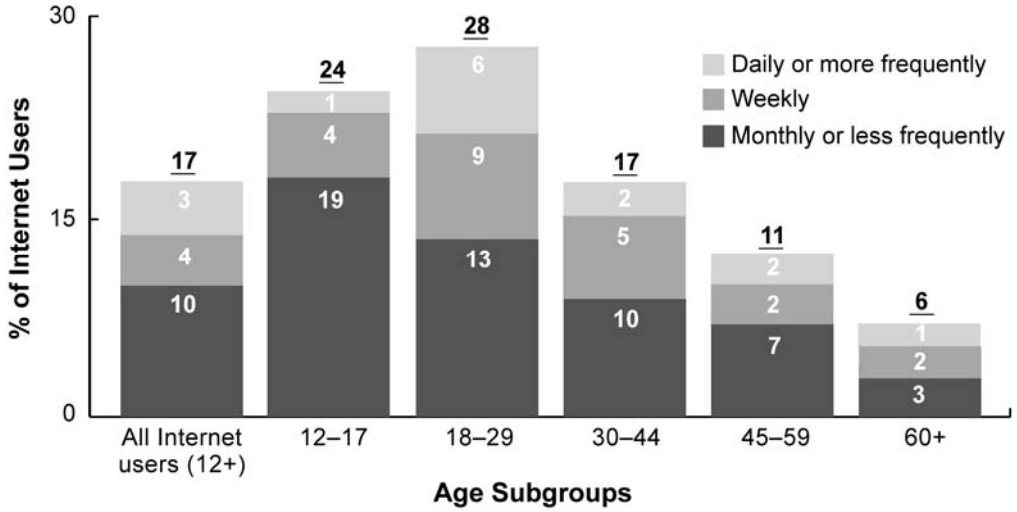
When attempting to imagine the future, it is important to try to measure the extent to which the computer screen is becoming synonymous with a television monitor. At the time of this survey, only 17% of Canadian Internet users had ever watched a television program online that was intended for conventional broadcast.

Only short-format videos and segments of broadcast shows were reasonably accessible and available in mid-2007. Distribution of most complete shows was confined primarily to (illegitimate) downloading, as very few networks or broadcasters had begun to make much more than these short segments available, particularly to viewers in Canada.[11] This, as many know, has proliferated since the time of CIP's survey as more and more broadcasters and networks have made programming available for online distribution. Likely the majority of this viewing at the time of the survey was in the form of segments available through YouTube or network sites such as Comedy Central and the question posed was interpreted by respondents as "watching television." As television programming becomes more typically — and legitimately — available online, viewing is expected to increase dramatically from the modest results reported in Figure 10-7.

For all the various forms of downloading or streaming, the most active users are younger Internet users (under 30 years of age), students, heavy Internet users, English speakers and males. Experience online is usually not a factor and relationships with region, education and income are not as consistent as are the variables cited above in demonstrating a relationship with online downloading or streaming activities.

[11] Most online television programming is to date only available in the US. Typically, copyright owners of US broadcast properties, distributed by American networks, are "geo-blocked" or restricted to only Internet connections that originate in the US.

Figure 10-7 Frequency of accessing television programming online, across age groups



CIP 2007 — C2.149M (Internet user respondents, 12 years +, n=2094)

10.6.6 Downloading Content — Paid and Free

Although distributors of audio and video products online have been trying for some time to develop services that Internet users will purchase, only 13% of Canadian Internet users had paid to download any form of online content in the six months prior to the survey. More than half of this paid content was music. As Table 10-5 indicates, the remainder included a variety of entertainment- and information-oriented content. This issue is discussed further in Chapter 13.

Table 10-5 Most popular content Internet users pay to download

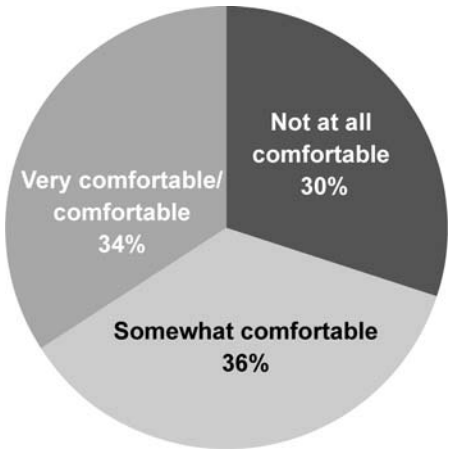
Content Downloaded	Percentage of Internet Users Who Paid to Download Content
	%
Music	57
Games	8
Videos	7
Software	6
Research/educational information	5
Movies	5
Work-related information	4
Newspapers	4

CIP 2007 — C2.168m1–o3 (Internet users who download content, 12 years +, n=264)

10.6.7 Comfort with Advertising Online

Many feel that the survival of the Internet — from a business model perspective — is to a large extent dependent upon the ability of media producers, online distributors and aggregators to monetize their content and services online. Results from this study partially support this possibility, or at least, the potential for some revenue streams to expand online. As illustrated in Figure 10-8, nearly 70% of Canadian Internet users are at least somewhat comfortable with viewing advertising when they access content free-of-charge. It appears that advertising-based business models for content-related online services may be accepted more readily than subscription-based models. Advertising in the online marketplace is discussed in more detail in Chapter 13.

Figure 10-8 Attitude of Internet users towards advertising-supported content



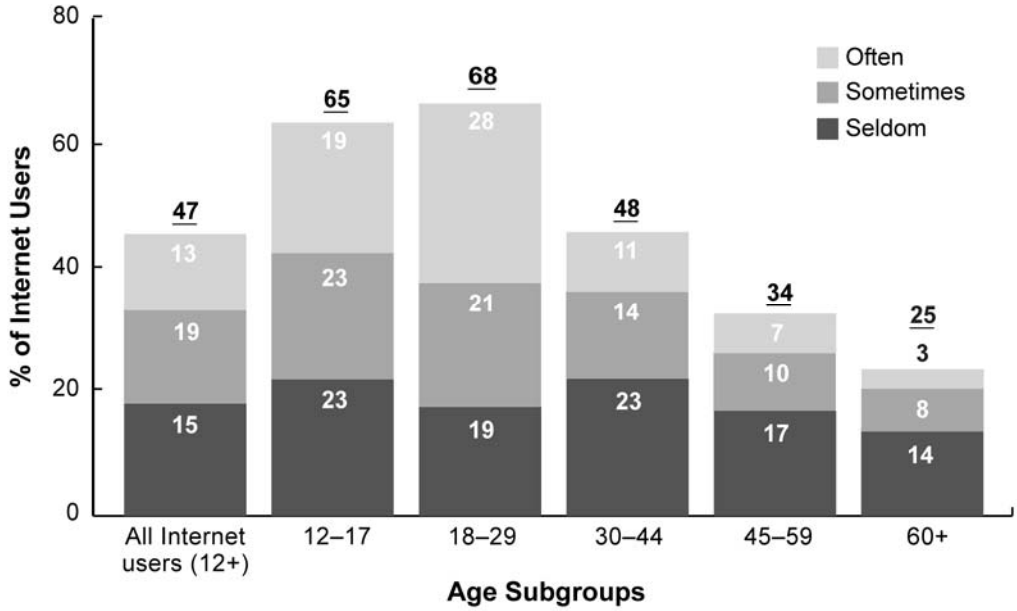
CIP 2007 — C2.173 (Internet user respondents, 12 years +, n=2259)

10.6.8 Legitimate versus Potentially Illegitimate Downloading

There has been considerable debate in Canada over the prevalence of illegitimate downloading,[12] with varying estimates of the exact levels of this activity. While self-reported survey data cannot provide a definitive answer, CIP 2007 provides some helpful information. Almost half of Canadian Internet users claim to have downloaded content from the Internet free-of-charge when they were aware that other sites would have charged a fee for the same download.[13] As Figure 10-9 illustrates, this activity is most common among younger Internet users. Among users, two-thirds of youth (12–17) and young adults (18–29) have downloaded content without paying a charge, knowing that legitimately there was a fee for such activity. Nearly half of all Internet users have engaged in this activity. Free downloading behaviour is more common among males (55%), heavy Internet users (59%), and those with access to broadband (54%) than among other users.

[12] Illegitimate downloading is defined as content that is knowingly accessed by an Internet user with the knowledge that to do so is likely a violation of the copyright of the rights holder.
[13] Securing accurate self-reporting of potential illegal activities in survey research is always challenging. While the findings above do not necessarily imply illegitimate downloading activity, the question was designed to elicit responses without causing respondents to feel uncomfortable about potentially admitting to an offence. However, given that that question asks respondents about their downloading preferences while knowing about the existence of other paid sites for similar content, it is probable that respondents were reporting potentially illegitimate downloading activities when answering this question.

Figure 10-9 **Frequency of free downloading activity when paid service is available, across age groups**



CIP 2007 — C2.169 (Internet user respondents, 12 years +, n=2355)

Interestingly, when Internet users were asked whether they used a file-sharing service, such as BitTorrent or Kazaa, only 23% reported doing so. In the age groups that report a higher incidence of free downloading when paid services are available (i.e., youth and young adults), the incidence of using file-sharing technology was much higher. Young Internet users may be more familiar with the names of the technology and website locations than are older Internet users. In the young adult category (18–29), the incidence of using file-sharing services was found to be 68%; in this age group 28% report they often download content free-of-charge knowing the same content is available for a fee.

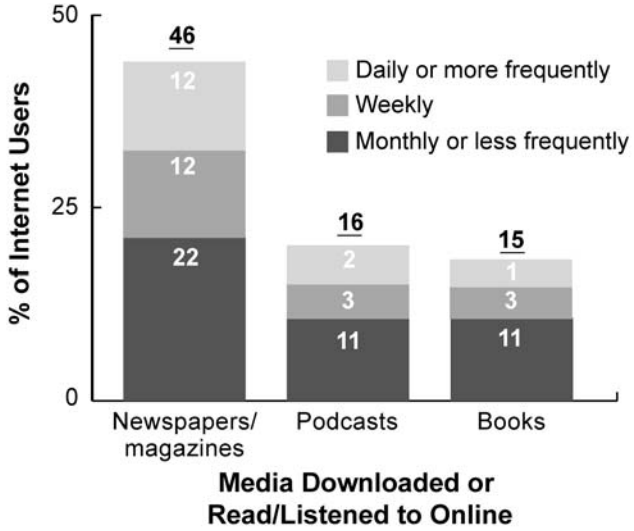
As one might expect, the use of file-sharing services is heavily influenced by the type of connection used (dial-up versus broadband) and familiarity with the Internet. Only 9% of those with a dial-up connection have used such a service, compared to 30% of those with high-speed broadband. Heavy users are almost three times as likely as light users to file share (32% compared to 11%). Males are also much more likely to use this technology than are females (31% versus 15%).

10.6.9 Other Media Downloaded and Consumption Behaviour

To better understand the extent of downloading behaviour, CIP 2007 asked respondents to report on other media downloaded or consumed online.

As shown in Figure 10-10, the most common activity reported was downloading or reading newspapers or magazines. In a typical week, the data show that 78% of all Canadians (including Internet users and non-users) read an offline newspaper at least once. In contrast, only 24% of Internet users read an online newspaper at least weekly. It is clear that to date only a small percentage of Canadian Internet users are migrating from printed versions to online newspapers and magazines. Most are using them to supplement, as opposed to replace, offline reading. For more discussion on this matter, see Chapter 6.

Figure 10-10 Frequency of other forms of online media activity



CIP 2007 — C2.150–152 (Internet user respondents, 12 years +, n=2370)

While podcasts have been heavily promoted in recent years, their use is still fairly limited. Less than 16% of Canadian Internet users have ever listened to a podcast and regular users are a very small group. Podcasts are made available for downloading to a portable device, such as an iPod, providing the consumer with the choice of when and where to listen to them. Over the last few years, devices have been released that permit the downloading of video as well. The Internet user groups most likely to access podcasts are those most comfortable and active online: heavy and experienced users.

Reading books online remains uncommon but the fact that 15% of Canadian Internet users — and 21% of those in the 18–29 age group — have downloaded or read a book online indicates that there are Internet users ready to consider this form of distribution. Nearly one in four heavy Internet users (online 15 hours per week or more) has read a book online.

10.7 Playing Games Online

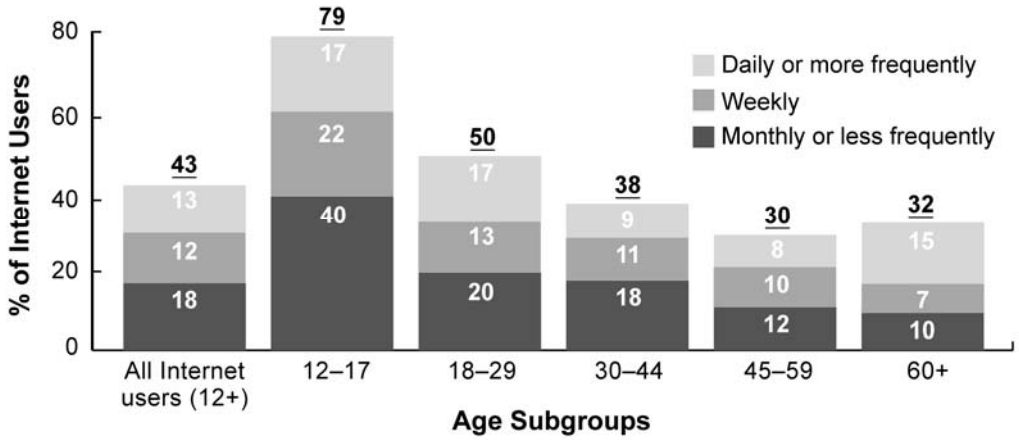
Video games have long been a driving force that motivates new computer hardware purchases by early adopters and others looking for the enhanced entertainment experience delivered by popular game titles. Games are a major entertainment medium and the Internet has increased their attractiveness to gamers as it allows increased opportunities to enjoy person-to-person contests with other players from around the world.

The new generation of game consoles comes complete with Internet services that, like their Internet-enabled PC counterparts, act as social networking sites for gamers. Some provide virtual world avatars[14] and real-time audio connections between players; in many cases these are more sophisticated than anything possible in Second Life or Facebook. Many games have supporting websites and fan sites and provide tools to allow game enthusiasts to creatively customize the game play environment. Video game playing, connected or otherwise, is an entertainment sub-culture imbued with opportunity for social interactivity and engagement that is so much a part of the contemporary online experience.

[14] An avatar is an object, such as an animation, that represents the user in a computer game or virtual reality simulation.

Overall, 43% of Internet users of aged 12 years and older play video games online and 13% play daily. As Figure 10-11 presents, four in five youth have played games online and nearly one in four play every day. Age and being in the student life stage are reliable predictors of online game playing. About half of heavy Internet users (online 15 hours or more per week) are gamers. Nevertheless, Figure 10-11 clearly demonstrates that online game playing has appeal to all age groups. Almost one-third of all elderly Canadian Internet users, 60 and older, engage in game playing online.

Figure 10-11 Frequency of playing games online against oneself or others, across age groups



CIP 2007 — C2.140M (Internet user respondents, 12 years +, n=2371

These overall penetration levels are impressive because, while these data do not distinguish between single player Internet games, such as poker or Sudoku, and highly sophisticated multi-player online games, they also do not include offline computer and video console games.

We also asked youth respondents to differentiate between whether they played games online with themselves or with others: 79% of those 12–17 reported playing games by themselves while 62% responded that they also play games with others while online. In both cases, nearly one in four youth play games on a daily basis by themselves or engaging with others online.

10.8 Visiting Sites with Sexual Content

Nearly 20% of adult Canadian Internet users admit to having visited a site with sexual content but very few do so regularly. Only 6% claim to visit such sites weekly or more often. Almost all visitors to these sites are male and most are under 40, with the highest percentage in the young adult (18–29) age group.[15] There is little doubt that these numbers are an underestimate, given what is known about response patterns in telephone surveys, particularly to questions requesting this type of sensitive information.

[15] This question was not asked of the youth sample.

10.9 Multi-Tasking — Simultaneous Media Consumption

The fact that many media users engage in multi-tasking, dividing their attention among various media or among media and other activities (a practice that appears to be increasing, particularly with the onset of the Internet) has long been a problem for professionals working in audience measurement.

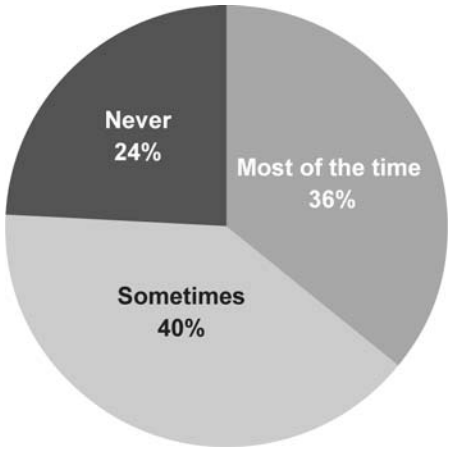
Traditional forms of media measurement focused on quantifying the continuous time a viewer/listener spent with mass media, such as television or radio. The assumption was that consumers used one medium at a time, an assumption that has been questionable since the advent of electronic media. The need for a generally accepted basis for establishing the value of advertisements meant that this kind of audience measurement, though known to be imperfect, was employed as the best available for the purpose. Audience practices on the Internet, however, have raised even more difficult questions about its continued utility.

Perhaps even more important, multi-tasking influences the degree of focus or concentration of Internet users when online, and therefore affects the suitability of different kinds of content for online distribution. Given the increased distraction resulting from multi-tasking across all facets of online behaviour, media producers and distributors need to consider this phenomenon as part of the changing appetites and patterns of consumption on the Internet. Because of the additional control interactive media platforms allow, it is likely that a large portion of the audience is engaging different media platforms simultaneously — much more so than when they had been attending to other traditional media. The new digital media are more interactive than are traditional media and offer greater opportunities for media multi-tasking. Figure 10-12 and Table 10-6 provide a summary users' multi-tasking behaviour.

More than three-quarters of Canadian Internet users (76%) are involved in more than one activity while online and more than one-third are "often" involved. The most frequent multi-taskers appear to be those in the young adult segment (aged 18–29 years), and especially students, with 91% engaged in other activities at least some of the time while online. Young people overall, including youth (12–17: 89%), are more likely to be multi-tasking than are other age groups.

Of all Internet users, one-third (34%) report that they are engaged in more than one activity most of the time when they are online. On average, 40% of time online is spent multi-tasking. Of all Internet users 35% are considered heavy multi-taskers — those who spend at least two-thirds of their time online engaging in other activities as well. Among those who spend more than two-thirds of their time online multi-tasking, the biggest groups are students (44%) and heavy Internet users (37%). In general, the more involved Internet users are with online activities, the more they are likely to multi-task and to do so with some regularity.

Figure 10-12 **Frequency with which Internet users engage in multi-tasking behaviour**



CIP 2007 — C2.177 (Internet user respondents, 12 years +, n=2310)

Table 10-6 **Frequency with which Internet users engage in multi-tasking behaviour, across age groups**

Time Spent Multi-tasking	Percentage of Internet Users Across Age Groups				
	12–17	18–29	30–44	45–59	60+
	%	%	%	%	%
Most of the time	51	57	38	24	15
Sometimes	38	34	42	44	33
Never	11	9	20	32	51

CIP 2007 — C2.177 (Internet user respondents, 12 years +, n=2310)

Respondents were asked to name some of their "other" activities while online. The most common other activities were using the telephone (mentioned by 44%, including 7% on a cell phone), listening to music from any source (36%), and watching television (32%). Another 13% reported listening to the radio. Across all Internet users, 18% of time on the computer is also spent watching television, while more than half the time online (54%) is also spent listening to music.

These data present a very strong indication that engagement online is considerably different than engagement with any other media. These findings further support the contention of this report that comparing the Internet as a medium to other traditional mass media such as television, radio and newspapers may not be the best way to understand online behaviour, from both economic and social perspectives. The experience of being online, and the multi-faceted engagement and interactivity that this presents, is unique and may only be measurable by a different paradigm and looking outside conventional models.

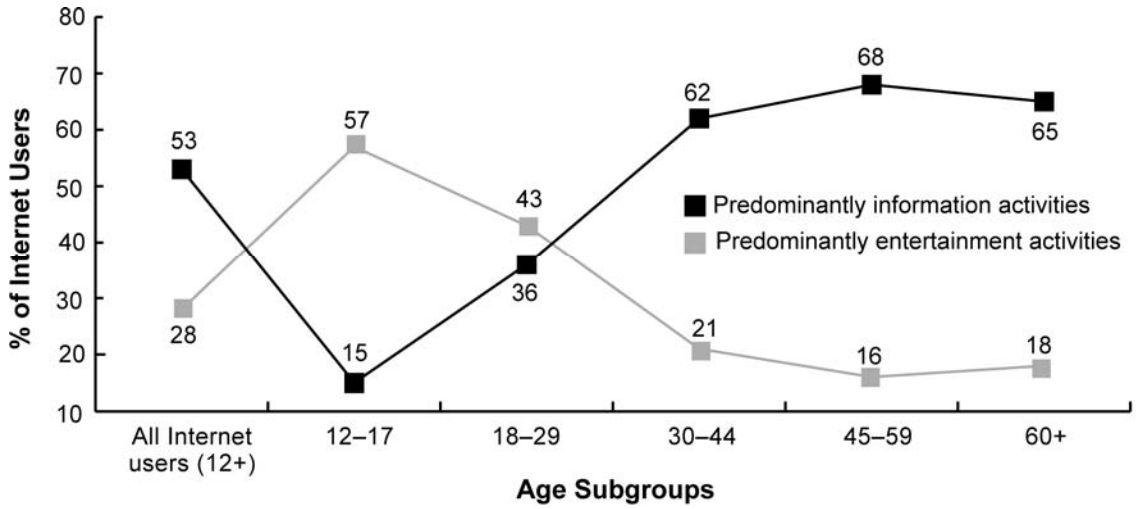
10.10 Information vs. Entertainment Online — Differences and Predominance

It is widely accepted that the Internet is the premier medium for gaining access to on-demand information of all kinds. Current news as well as vast archives and resources are available

through search engines and are free-of-charge to anyone who can manage a keyboard and mouse. However, while communication and information remain central to the appeal of the Internet, entertainment is becoming increasingly important as well.

As reported in Chapter 9, when asked about the perceived distinction between information-related and entertainment-related activities engaged in online, Internet users responded that on average, 60% of their time was spent for information purposes and 40% for entertainment purposes. Figure 10-13 provides the ratio of time spent online for the purpose of information and entertainment for each age group. For example, the information to entertainment ratio for youth is 40:60, with entertainment taking up the most time, whereas for those over 60 years of age, the ratio is 68:32, showing a strong focus on information.

Figure 10-13 Predominant motivation for being online: Seeking information versus entertainment



CIP 2007 — C2.175T (Internet user respondents, 12 years +, n=2415)

In terms of life stage, more than half of students spend more time online for entertainment than for information, while 15% devote more time to information purposes. However, Internet users who are full-time employed and those who are retired are far more likely to be online seeking information than entertainment (61% compared to 22%). Entertainment uses predominate for the young adult group. Various measures in the CIP surveys indicate that entertainment seeking is becoming a more common and important reason for going online, especially at home. The percentage of Internet users who perceive the Internet as not important as a source of entertainment declined from 55% in 2004 to 39% in 2007.

10.11 Internet Impact on Other Media

CIP measured respondents' perceptions of the impact the Internet was having on various traditional media. Chapter 6 provides a comprehensive breakdown of frequency and time spent with various media and the Internet. Based on the findings reported in that chapter it was concluded that online activities are not displacing traditional media as much as augmenting them. Chapter 6 specifically illustrates that there has been no extraordinary decrease in consumption of traditional media as a result of being online.

Here, respondents were directly asked about their attitudes, and whether they perceived that the Internet was diminishing their use of other media. These findings based on the data collected tend to contradict the study's measurement of actual behaviour reported in Chapter 6. As Table 10-7 illustrates, while most Internet users do not think that being online has affected their use of offline media, between 18% and 25% perceive a decrease in their use of specified other media as a result of their Internet use. Few Internet users think that being online has increased their use of another form of media.

These findings appear to reflect the kinds of choices that Internet users feel they are making about how to allocate their discretionary time, even though their actual media menu has not changed much.

Table 10-7 Perceived impact of Internet use on time spent with other media

Traditional Media Impacted by Internet Use	Percentage of Internet Users Who Perceive Internet Has/Has Not Changed Time Spent with Other Media		
	Decreased	Has not changed	Increased
	%	%	%
Newspapers	26	66	8
Magazines	24	70	5
Television	24	67	9
Local broadcast radio	21	71	7
Recorded music (CDs/tapes/albums)	27	62	12
DVDs	18	73	9

CIP 2007 — C2.161–166 (Internet user respondents, 12 years +, n=2367)

For all of the six media types listed in Table 10-7, age is an important factor influencing the perceptions of Internet users. Most Internet users over age 50 — on average, nearly three in four — report that the Internet has not changed their use of other media. Younger Internet users, especially those under 29 years of age, are considerably more likely to think that being online has reduced their use of offline media. Still, an average of three in five of those aged 12–29 reported no change in media use as a result of being online, except for listening to recorded music on a physical source such as a CD, tape or vinyl album. Nearly one in four of the youth sample (12–17) reported an increase in the use of recorded music as a result of being online, while more than one in three said they were listening to less recorded music as a result of Internet use. For some younger Internet users, downloaded music replaced store-bought music, while a smaller but still significant group purchased a physical music source of some kind after hearing a sample online.

Table 10-8 Perceived impact of Internet use on time spent with other media, by youth

Traditional Media Impacted by Internet Use	Percentage of Youth Internet Users Who Perceive Internet Has/Has Not Changed Time Spent with Other Media		
	Decreased	Has not changed	Increased
	%	%	%
Newspapers	35	57	8
Magazines	34	57	10
Television	28	57	15
Local broadcast radio	31	60	9
Recorded music (CDs/tapes/albums)	34	42	24
DVDs	21	65	14

CIP 2007 — C2.161–166 (Internet user respondents, 12–17 years, n=276)

Some important relationships emerged for each medium. With respect to newspapers, those most likely to report decreased use were

- younger Internet users (12–24 years): 33%
- heavy Internet users (online for 15 hours or more per week): 34%
- males: 31%.

However, Internet use led to a perceived decline in offline newspaper reading in all age groups, including 17% of Internet users 60 years of age and older.

For magazines, the percentage reporting decreased used was highest in the youth sample (34%) but was 20% even among those 60 years or older. Males (29%) were more likely to report a decrease in magazine use than were females (20%).

The perceived impact of Internet use on television viewing was fairly consistent across most age groups, except for young adults (18–24), with 35% reporting decreased use, and youth (12–17), with 28% reporting decreased television use. The results for these age groups are approximately 8–12% higher than average. Others more likely than average to report decreased television viewing were those with access to broadband (27%), heavy Internet users (30%) and males (28%). As for radio listening, young adults were most likely to perceive a decline, as were heavier Internet users.

Internet-driven changes in consumption patterns for offline or traditional media have important implications for society and the media industries. Perceived changes in media habits are most significant among adults, who developed their media habits before the Internet came into existence. What is most significant in these data, then, is that a significant proportion in all age groups perceived a decline in their use of offline media as a result of being online.

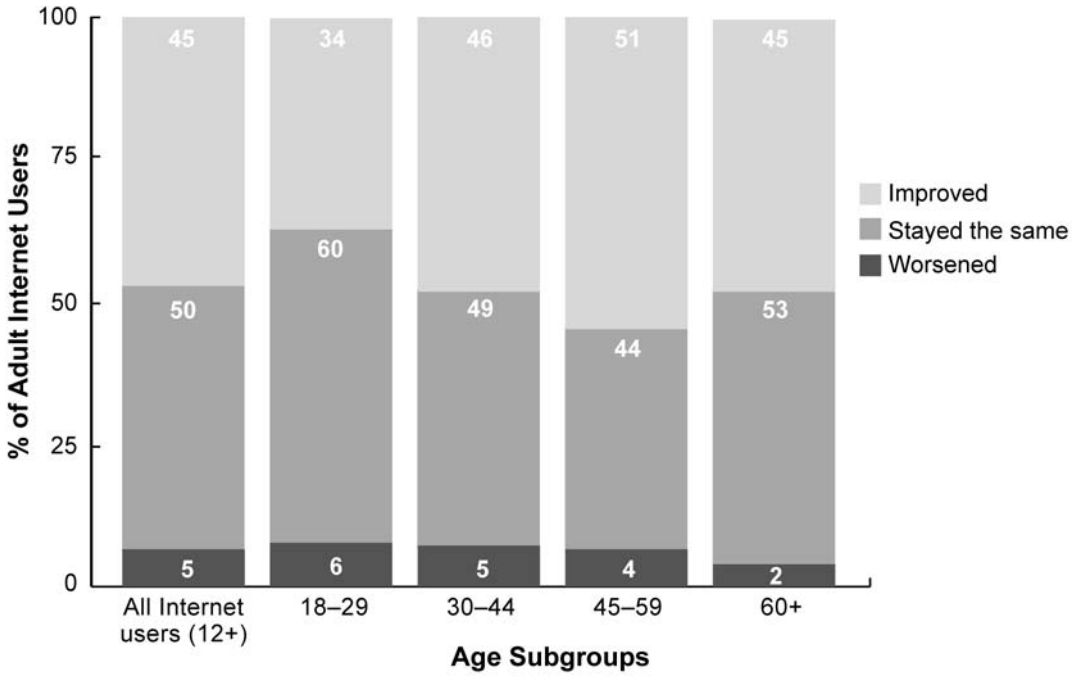
When looking at data on penetration levels and time spent with various media, however, the picture becomes complex. As was discussed in Chapter 6, reported behaviour patterns are quite different from perceived attitudes regarding the impact of the Internet on consumption of other, more traditional media. Chapter 12 offers more discussion on media use patterns. This is evidently an area that requires more extensive investigation than that offered in the current report.

10.12 Perceptions of Internet Impact on Work Performance

In assessing the impact of the Internet on the lives of Canadian Internet users, it is important to look beyond media consumption patterns and examine how Internet users feel about its effects on their work lives and their personal lives. Following the lead of WIP studies, CIP examines perceptions of Internet effects on both aspects of everyday life.

In general, Canadian adult Internet users are more positive than negative about the impact of the Internet on work performance and productivity. Whereas 45% think it has improved their work performance, only 5% think it has worsened productivity. However, this leaves 50% who perceive no impact at all.

Figure 10-14 Perceived impact of Internet use on work performance and productivity, across age groups



CIP 2007 — C2.215a (Internet user respondents, 18 years +, n=2019)

Interestingly, there is a significant difference in the perceptions of various adult age groups. As Figure 10-14 shows, Internet users aged 18–29 are considerably less likely to report improved work performance than are those in the older age groups (34% compared to between 45% and 52% for older Internet users). Those most likely to perceive an improvement are in the 45–59 age group (52%), arguably the group most likely to have experienced the introduction of the Internet mid-career. This conclusion is supported by the fact that the most experienced Internet users (15 years or more online) are much more likely to see improvement than are users who have been online less than five years (58% compared to 27%). It appears that younger users may take the Internet for granted.

Heavy users (58%), those with access to broadband (49%), those with a university degree (62%) and those from households of the highest income quartile (51%) are also more likely than other users to attribute improved productivity to Internet access. Taken together, these relationships

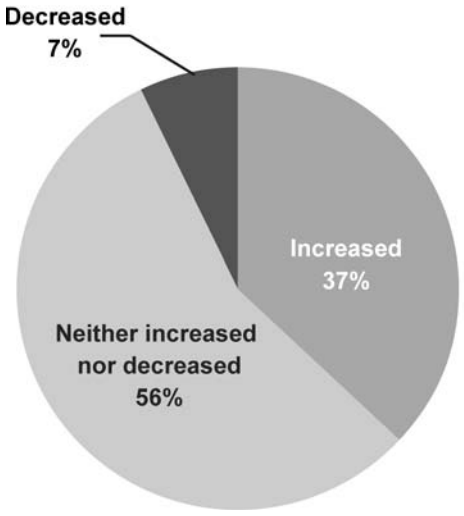
suggest that the greatest improvements in workplace performance are seen by Internet users in professional and managerial occupations. There are also regional differences, with 52% of British Columbia residents reporting improved productivity at work, whereas only 33% of Prairie province inhabitants feel the Internet has improved workplace performance. These are, respectively, above and below the national average of 45% of adult Internet users who report improved productivity at work because of the Internet. Again, these data suggest that the occupation category is an important factor in determining one's attitude in this regard.

Enhanced communication is among the aspects of Internet use that might be related to perceived productivity. Nearly 44% of employed Internet users report having increased contact with people in their profession, compared to only 7% who thought the Internet had decreased such contact. Heavy Internet users (55%) and very experienced users (62%) are much more likely than users who spend less time online to perceive the networking benefits of the Internet. University graduates (65%) also are more likely than other users to consider enhanced professional contacts to be a major result of Internet use. Residents of British Columbia (52%) are more likely than average to report increased professional contacts as a result of Internet use than are residents of the Prairie provinces (31%) or Quebec (33%). Anglophones (46%) appear to make more use of the Internet to maintain professional contacts than do Francophones (37%).

10.13 Impact of the Internet on Socializing with Family and Friends

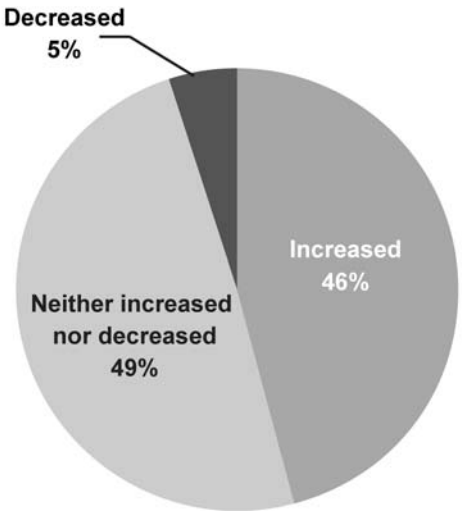
Overall, it appears that Internet users believe that being online has increased their contact with family and friends but decreased the time they spend together face-to-face. As Figures 10-15 and 10-16 illustrate, nearly half of all Internet users believe that being online does not affect the amount of contact they have with family (56%) or friends (49%). Of those who perceive a difference, however, most think their Internet use has increased contact, especially with friends, with only a small percentage reporting a decrease in contact with either group.

Figure 10-15 Perceived impact of Internet use on contact with family



CIP 2007 — C2.223a (Internet user respondents, 12 years +, n=2360)

Figure 10-16 Perceived impact of Internet use on contact with friends



CIP 2007 — C2.224a (Internet user respondents, 12 years +, n=2360)

The Internet is seen as having a positive effect on keeping in touch with family and friends by a substantial proportion of Internet users in all age groups. This is especially true of more frequent Internet users. Older respondents are slightly more likely than average to think that the Internet has increased their contact with family, while younger respondents are more likely to cite increased contact with friends. Even with respect to friends, however, while more than 50% of users less than 30 years of age perceive more contact, so do nearly 40% of those over 60 years of age.

French-speaking Internet users are much less like than English-speaking Internet users to think that being online has increased their contact with family or friends. Whereas, English-speaking users credit the Internet with increasing their contact with family (40%) and friends (48%), only 27% of French-speaking users perceived an increase in contact with family and only 34% with friends. This is one of several indications in this report than English-speaking Canadians have integrated the Internet more deeply into their everyday lives than have French-speaking Canadians.

When it comes to estimating actual physical, face-to-face contact, those Internet users who perceive a change as a result of being online are most likely to think time together has decreased. For all Internet users, 26% perceive a loss in time with family and 17% with friends, compared to 5% who see an increase in family time and 8% with friends. More than seven in ten, however, do not perceive any change in their face-to-face time allocations.

As shown in Table 10-9, the biggest differences are between youth and adults. Internet users aged 12–17 are more likely than adults to perceive a change in time spent with family and friends; 35% think their time with family has decreased and 20% think face time with friends has decreased. However, nearly as many youth think the Internet has increased their face time with friends.

Table 10-9 Perceived impact of Internet on physical time spent with family and friends, across age groups

Impact of the Internet on Face-to-Face Time	Percentage of Internet Users Across Age Groups		
	All Internet users (12+)	Youth (12–17)	Adults (18+)
	%	%	%
Household members			
Less time together	26	35	25
Same amount of time together	70	59	71
More time together	5	6	5
Friends			
Less time together	17	20	16
Same amount of time together	75	62	77
More time together	8	18	7

CIP 2007 —C2.228–229 (Internet user respondents, 12 years +, n= 2273/2345)

CIP also asked respondents how much time they spend with family and friends. The average for all Internet users 12 years and older is 16.3 hours per week with family and 8.6 hours per week with friends. Interestingly, and somewhat contrary to the attitudes reported above, those respondents who use the Internet the most (15 hours per week or more) spend more time with family (18.1 hours per week) and friends (9.3 hours per week) than average. While some of this time may be spent engaging with family and friends online, one in four Internet users believe their time with family has decreased, and nearly one in five believe their time with friends has decreased.

All these data seem to indicate that, as expected, Internet use has for many users increased virtual contact with family and friends, while decreasing actual face-to-face time. This is especially true of heavy Internet users. However, a majority in all age groups do not perceive any affect at all. Most Internet users appear to have integrated the Internet into their social lives without feeling that it has changed other elements of day-to-day living. It is also important to note that the Internet has increased face-to-face time with friends for a sub-set of younger Internet users.

However, as reported in Chapter 6, time spent using the Internet has not dramatically come at the expense of time spent with other traditional media. It appears that one of the principal social activities that has declined to provide more capacity to be online is physical time spent with family and friends. In addition, increased time multi-tasking — engaging in several divergent activities while online — appears to provide additional time for Internet engagement. The changing social orientation of relationships created and maintained by virtual compared to physical presence is a subject that warrants further investigation.

Much of the commentary on Internet use, especially among younger users, assumes that being online is a solitary activity, with any interpersonal interaction likely to be online or virtual. However, a surprising proportion of Internet users report using the Internet with “someone physically beside [them] participating in or watching the online activity.” Nearly 75% have done so and more than one-third do so at least sometimes.

10.14 Using the Internet with Someone Alongside

As Table 10-10 indicates, age is a factor in the frequency of Internet use in the presence of others. It is most common to be online with someone physically alongside for youth (12–17) and young adults (18–29). This practice declines with age, indicating that the Internet has an independent as well as a social aspect for many younger users. The likely reasons for sharing time online with someone else include parental supervision (discussed below), teaching online skills, watching videos or playing games and, possibly, working on materials to post online.

Table 10-10 Frequency of being online with another person present, across age groups

Frequency on the Internet With Someone Beside You	Percentage of Internet Users Across Age Groups			
	All Internet users (12+)	Youth (12–17)	Young adults (18–29)	Adults (18+)
	%	%	%	%
Often	10	15	12	8
Sometimes	26	41	32	24
Seldom	37	31	40	38
Never	27	13	17	29

CIP 2007 —C2.103 (Internet user respondents, 12 years +, n= 2373)

10.15 Internet Impact on Personal and Social Contacts

As many are aware, the Internet has provided for the development of "taste communities" or "communities of interest." The global connectivity afforded by e-mail, IM and various forms of social networking has stimulated the development of many social linkages that transcend geographic borders. As has been shown, many Canadians participate in these networks.

Similarly, many Canadian Internet users believe being online has increased their contacts with family, friends and people in the same profession. As Table 10-17 shows, a somewhat smaller proportion (30%) has increased contact through the Internet with those that share hobbies or recreational interests. Only 7% believe their use of the Internet has decreased such contacts.

When it comes to co-religionists and those who share political interests, however, more than three-quarters of Internet users think being online has no effect on their contacts with these groups. In fact, more users think being online has decreased their contacts in this regard than think it has increased them. It appears that religion and politics are not significantly strong online communities of interest for Canadians.

Overall, the online communities that appeal more to Canadians tend to be interpersonal and recreational, rather than religious or civic.

Table 10-11 Perceived impact of the Internet on contact with those who share similar interests

Similar Interests Shared with Others	Percentage of Internet Users Who Perceive Internet Has/Has Not Changed Contact With Others		
	Decreased	Remained the same	Increased
	%	%	%
Similar hobbies/recreational activities	7	61	30
Political interests	14	76	10
Religion	15	77	8

CIP 2007 —C2.220a–222a (Internet user respondents, 12 years +, n= 2360)

10.16 Perceptions of Youth Versus those of Parents Regarding the Internet

One of the distinctive contributions of CIP 2007 is data on families and their Internet usage habits, featuring interviews with Canadian adults about their perception of the Internet habits of their younger children and youth, as well as interviews with a youth sample. Parents of children under 18 years of age were randomly asked to refer to one child in their household, whose age and gender was recorded. Both Internet user and non-user adults were interviewed about their perceptions of their child's behaviour with respect to the Internet. Youth respondents, during their interviews, were asked similarly designed questions. Parents' perceptions of their childrens' online practices were compared with the reported behaviour of youth respondents.

In the discussion that follows, adult responses are reported with reference only to children in the 12–17 age group, in order to make comparisons with youth sample respondents (n=400). Though the questions posed to adults were not always asked of the same youth member in the household (only 18 of 400 youth respondents came from identical households), the responses are sufficiently general and robust to extrapolate and compare parents' understanding of their children's attitudes and online practices with youth's reported perception and behaviour. The diversity between the perception of adults and the practices of youth is fascinating.

The data also permit an overview of the relationship between the presence of children and youth in the household and patterns of Internet use:

- 39% of adult households interviewed for CIP have children under 18 years of age
- 74% of households with children less than 18 years old report their child uses the Internet
- Surprisingly, 53% of adults who did not use the Internet themselves reported that their child (18 or younger) did (adult Internet users: 77%)
- All adults surveyed report that 95% of all Canadian youth (aged 12–17) in their household use the Internet; this corresponds with penetration levels found among the youth sample (96%)
- Internet non-user parents report 87% of the youth referred to in the interview used the Internet (compared to 96% of Internet user parents)
- All adult parents surveyed report that 51% of children under 12 years old in their households are also online (Internet user parents: 56%, non-user parents: 21%)
- Parents report that the child about whom they responded spends an average of 9.1 hours per week online at home — a significant increase from 2004 when the estimate was only 5.1 hours.
- Parents estimate that, when the child about whom they responded is between 12 and 17 years of age, the child spends an average of 11.9 hours per week online

- In comparison, youth (12–17 years) state that their overall Internet use is 16.3 hours per week from all locations (a difference of 4.4 hours compared to parents' estimates)

These data make it clear that the Internet is a significant feature in the lives of virtually all those in the 12–17 age group and many younger children. There are even high penetration levels among children in households where parents do not use the Internet.

Adults appear to underestimate the time spent online by youth by a considerable amount. Only 20% of youth are light users (less than five hours per week), compared to 28% of those 18 and older. On average, youth spend about an hour less online than do adults in a typical week (16.3 compared to 17.1 hours). They cluster in the moderate use category (5 to 15 hours per week) but more than one-third are online more than 15 hours a week. Interestingly, there are few significant demographic differences in Internet use patterns in the youth sample.

As noted above, the data permit comparisons between the perceptions of parents and youth with respect to their understanding of Internet use by youth and its impact on their lives. Table 10-12 provides a breakdown of responses from parents and youth respondents. The distribution of opinion among adults and youth is very similar with respect to the effect of Internet use on time spent watching television. More than one in three in both groups think that Internet use by youth reduces time watching television, while a similar number disagrees.

Table 10-12 Perceptions about the Internet: Comparison of parents and youth

Perception of Internet Practices — Adults versus Youth	Percentage of Parents of Youth and Youth (12–17)		
	Agree	Neutral/undecided	Disagree
	%	%	%
Youth has skills to safely browse the Internet			
Parents' perception *(C2.252a; n=421)*	74	13	13
Youth's response *(C2.252Ya; n=286)*	85	12	3
The Internet reduces youth's other important activities			
Parents' perception *(C2.255a; n=420)*	35	24	42
Youth's response *(C2.255Ya; n=286)*	22	26	52
The Internet reduces youth's time with family and friends			
Parents' perception *(C2.256a; n=419)*	32	24	45
Youth's response *(C2.256Ya; n=286)*	15	30	56
The Internet reduces youth's television use			
Parents' perception *(C2.257a; n=418)*	39	30	32
Youth's response *(C2.257Ya; n=286)*	36	32	32

Perception of Internet Practices — Adults versus Youth	Percentage of Parents of Youth and Youth (12–17)		
	Agree	Neutral/undecided	Disagree
	%	%	%
There is reason for concern regarding youth communicating with unknown persons online			
Parents' perception *(C2.258a; n=419)*	54	18	28
Youth's response *(C2.258Ya; n=286)*	33	28	39
Youth needs the Internet for social acceptance			
Parents' perception *(C2.259a; n=417)*	23	24	53
Youth's response *(C2.259Ya; n=286)*	9	20	72
Youth Internet use should decrease			
Parents' perception *(C2.260a; n=417)*	38	36	26
Youth's response *(C2.260Ya; n=286)*	23	35	42

CIP 2007 (Parent of youth and youth respondents, 12 years +)

Note:
- In these comparisons, some totals may not add to 100% due to rounding.

Where there is disagreement, it is often a matter of degree. For example 85% of the youth sample believes they have the skills to safely browse Internet, while only 74% of adults agree with that sentiment. Among parents, 13% are concerned that their child may be lacking the necessary skills to be online, a position held by only 3% of the youth sample. Similarly, while 54% of adults are concerned about children or youth communicating with unknown persons online, this concern is shared by only 33% of the youth sample (39% of youth feel confident that this is not a problem).

The effect of time spent online is an area of disagreement between parents and youth. A majority of those with an opinion do not think that children and youth spend too much time online, but 38% of adults and 23% of youth do think it would be a good idea for these young people to spend less time online. Adults (33%) are considerably more likely than their children to think young people spend less time with family and friends as a result of being online. Only 15% of youth respondents feel this way. As noted above, youth are more likely to think that the Internet has reduced their time with family than with friends.

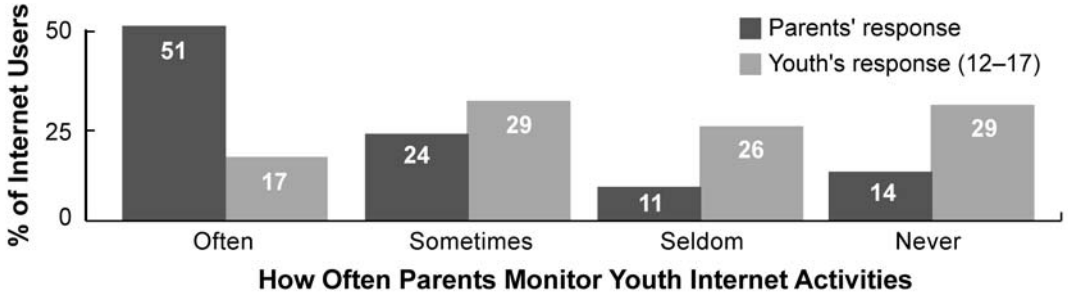
Although most respondents do not think the Internet is a necessity for children or youth in their households to gain social acceptance, adults are twice as likely as youth to think so (24% compared to 9%). Nevertheless, 49% of the youth sample thinks that losing access to the Internet would pose a problem for them. A few (7%) think not having access to the Internet would make their lives better. Clearly, the Internet is an important part of the lives of youth (12–17), even if it is not felt to be essential for social acceptance.

Many parents feel a responsibility to monitor or participate in the online activities of their child (less than 12 years old). Most adults (85%) report that they “often” monitor the online activities of their children and 50% say they are often present when their children are online, participating in or monitoring their activities.

With youth (12–17), however, adults are somewhat less likely to monitor and participate in their online activities. Nevertheless, as Figure 10-17 shows, 51% of parents say they monitor youths’

activities often and only 26% do so seldom or never. This is in sharp contrast to youth responses; only 17% of youth believe that adults monitor their online activities often and 54% say monitoring happens seldom or never.

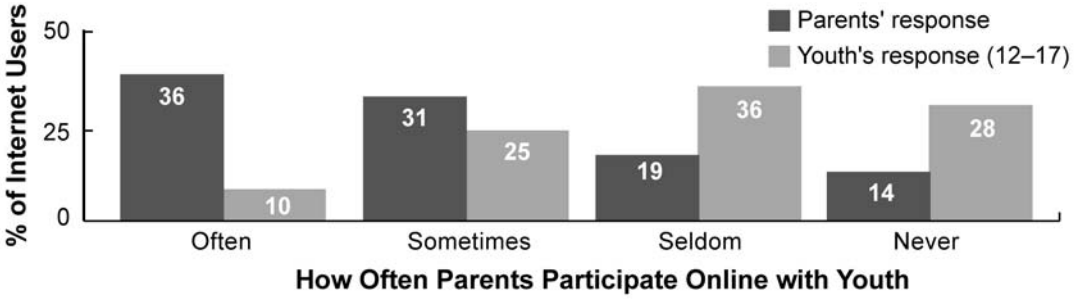
Figure 10-17 Perceptions of parental monitoring of youth online: Comparison of parents and youth



CIP 2007 — C2.253, 253Y1 (Parents of youth and youth respondents, 12 years +, n=420/283)

When it comes to participating in online activities, as Figure 10-18 reveals, more than one in three adults report being with their child often while she/he is online. Only 10% of youth think this happens often and 64% think it happens seldom (36%) or never (28%).

Figure 10-18 Perceptions of parental participation with youth online: Comparison of parents and youth



CIP 2007 — C2.254, 254Y1 (Parents of youth and youth respondents, 12 years +, n=418/283)

It seems likely that youth respondents, who go online fairly often away from home (at school, at the homes of friends and relatives, in public libraries, and so on), have a more accurate understanding of how they themselves spend their time online. The divergence between the perception of adults about the behaviour of youth in their household and the actual behaviour and practices of youth is a common and age-old phenomenon, one clearly not restricted to circumstances concerning the Internet.

10.17 Abuse and Unpleasant Activities Online: Security and Privacy Issues

When examining the extent to which the Internet has been perceived to enhance contemporary life, it is essential also to look at some of the negative features of being online: spam, abusive e-mails, computer viruses, phishing and various other kinds of fraud.

"Spam" or unwanted e-mail communications have long been an annoying part of online life. There is little doubt that these intrusions into the online world pose a threat to the comfort Internet users feel in their online space. While the amount of spam shows little sign of abating, tools to combat the inconvenience it causes have improved; they cannot however stop all form of unwanted e-mail.

Figure 10-19 Frequency of various forms of Internet abuse

CIP 2007 — C2.113–119 (Internet user respondents, 18 years +, n=2090)

As Figure 10-19 shows, the most common abuses are computer viruses and e-mail requests for funds from strangers. Even though a majority of Canadian Internet users have avoided these intrusions, they are common enough to raise concerns. The threat of viruses is cited by some non-users as a reason for not going online.

More than one in four Internet users have received e-mail requests for bank details and 7% report being victims of phishing — being scammed into surrendering private information to an identity thief. The latter may be an underestimate. Males and those with higher levels of formal education are more likely to report phishing than are other groups, perhaps because they better recognize this form of online fraud.

Of even greater concern, perhaps, are obscene or abusive e-mails. Nearly one in three adult Internet users has received an obscene or abusive e-mail from a stranger. Heavier users of the Internet (online 15 hours per week or more) are more likely targets (37%). Nearly 10% have

received such an e-mail from an acquaintance. Women and men are equally likely to have received an abusive or obscene e-mail.

As Table 10-13 shows, many Internet users have taken steps to protect against viruses, but only a minority have tried to block out spam, unwanted pop-ups and other intrusions. It appears that many users rely on their ISPs for protection.

Table 10-13 Measures taken by Internet users to prevent abuses online

Most Common Preventative Measures Taken	Percentage of Adult Internet Users
	%
Use anti-virus software	42
Screen/delete/block spam from unfamiliar senders	26
Install/strengthen firewalls	15
Use spyware/adware prevention	9
Use security protection software	7
Avoid giving personal information	5
Avoid insecure websites	4
Report abuse to RCMP/police/service providers	4

CIP 2007 —C2.120m1–m3 (Internet user respondents, 18 years +, n= 1920)

In general, it seems that these abuses are not preventing Canadians from accessing the Internet, though they may be interfering with their enjoyment of it.

10.18 Trends: 2004 to 2007

Since 2004, Canada has witnessed considerable growth in the use of the Internet for a wide range of Internet applications. Few of the online activities that preoccupied many Internet users in 2007, such as visiting blogs or social networking, were examined in CIP's 2004 survey. Even when Internet users were asked to identify important activities not mentioned in the survey, respondents did not comment on these online practices in 2004. The growth in popularity and continued proliferation of these activities in the past three years, especially among younger users, is an indicator of a major shift in Internet use.

Activities enhanced by broadband have also shown dramatic growth, particularly entertainment-related activities. For example, as discussed in Chapter 9, the percentage of adult Internet users who download or listen to music online has nearly than doubled — from 27% in 2004 to 52% in 2007. The percentage of Internet users who watch movies online has increased from 4% in 2004 to 18% in 2007. As has been seen, playing games online has also increased in popularity (from 23% of adult users to 37%), as has listening to radio online (from 18% to 39%). The proportion of adult Internet users visiting television program websites is also up significantly, from 19% in 2004 to 42% in 2007, and the percentage visiting television station or network websites has also increased, from 31% to 48%.

In 2004, 32% of Internet users reported that being online had reduced their time watching television. This proportion declined to 24% in 2007. However, television watching time has declined slightly among Internet users and non-users alike.

Perhaps the most important general trend has been the increasing importance of entertainment as a reason for going online. In 2007, information seeking remains the primary motive for going online for most Internet users, but entertainment has gained substantially since 2004. The percentage of Internet users who perceive the Internet as not important as a source of entertainment declined from 55% in 2004 to 39% in 2007.

There is some evidence that the impact of the Internet on family and social life has increased since 2004. Most Internet users in 2004, 84%, did not believe that their Internet use had any affect on their time with family and friends. Only 9% felt that they were spending less time with family and friends as a result of time spent online. In 2007, responses to a closely related question suggested that this number had risen substantially. As noted above, many respondents believe that the Internet has increased their contact with family and friends. However, 26% perceive a loss of face-to-face time with family as a result of being online, while 17% believe that their time with friends has decreased.

Parents estimated the time spent online by their children in 2004 to be 5.1 hours per week. In 2007 this had risen almost 80% to 9.1 hours per week. There has been little change in parents' perceptions of their children's skills to safely engage the Internet, with more than 60% confident that their children have the necessary skills.

Many of the topics covered in this chapter were visited for the first time in 2007. The data presented here will serve as benchmarks for future longitudinal analysis.

10.19 Conclusions

This chapter provides an overview of the ways in which the Internet is affecting the lives and perceptions of Canadians, based on an unmatched array of data.

Canadians, particularly those under the age of 30, have adopted community and social networking applications as a part of their typical communications routines. More than half of Canadian Internet users who visit social networking sites regularly visit Facebook. For those under 30 years, a new forum for social interaction has emerged. It is a forum for personal expression and interaction that is available 24/7 for access and/or engagement and it shows no signs of diminishing in its importance. The rapid growth of social networking is among the most important developments of the past few years.

The online world continues to include considerable behaviour designed to annoy, offend and deceive. Spam, viruses and phishing endure, with no signs of disappearing soon. While a source of concern for many Internet users, these intrusions do not seem to be a significant deterrent to going online for most Canadians.

Canadian Internet users have avidly embraced music distributed online and are in the process of engaging videos/films/television programs online with similar enthusiasm. Not surprisingly, Canadians who download online content are more likely to go to a free site, even when a paid version is available. A majority of Internet users find advertising acceptable on sites they visit and, on the basis of our data, it is reasonable to conclude that advertising is more popular with users than are fees for visiting sites or downloading.

Other online media such as podcasting and reading books online have relatively low participation by Canadians but are more commonly used by Internet users that tend to be early adopters — younger users who spend a lot of time online. Online games are popular with Canadian Internet users of all ages.

Newspapers continue to hold a high level of trust among readers and any thought that the decline of the newspaper is directly due to an online-only migration is not supported by this analysis.

Multi-tasking behaviour was measured in 2007 for the first time. Most Canadian Internet users multi-task online from time to time. It is apparent that the age group most comfortable with multi-tasking is young adults (18–29), who appear to be in a constant state of multiple media consumption.

Significant portions (between one-third and one-half) of young adults use the Internet predominantly as an entertainment medium. While there are some self-reported decreases in traditional media use, it is possible that the abundance of media available from all sources may lead not to a perceived decline in overall consumption but rather to a perception of decreases in time spent with any one medium. This could also possibly be a result of multi-tasking.

Most Internet users do not perceive Internet access as having any significant effect on productivity. Among those that do, however, most view Internet access as having a positive impact. This may be a comment on the length of time that the Internet has been a part of the workplace and that it is now seen as integral to accomplishing work.

Parents and youth disagreed most clearly on the capacity of youth to safely surf online. It is noteworthy that they shared concern about the Internet taking youth away from other important activities and about the youth spending too much time on the Internet. Adults tend to think they participate in the online activities of the young people in their household much more than do the young people themselves.

Perhaps the most important conclusion is that the Internet provides a vast array of activities for users and that, despite annoyances and concerns, it is increasingly integrated into the social and work life of a majority of Canadians. For many younger Internet users, going online is as much about exploring, socializing and experiencing new forms of interaction as it is about sending targeted communications, seeking information or working. The use of the Internet for entertainment and interaction is not, however, displacing its use for communication or learning. Rather, new and innovative forms of Internet use are being added to the solid foundation of instrumental uses. This chapter has explored the incidence and impact of these new uses and the online world they are helping to create.

11 Civic Engagement and Government Online

11.1 Key Findings

- Use of e-government services is relatively high and growing; more than 60% of Canadian Internet users have accessed government information online
- Civic engagement is low; fewer than one in five has communicated with an elected official or civil servant
- Civic engagement is strongly related to frequency of Internet use and social engagement online
- Active online social networkers are on average 10% more likely than those who do not use these networks to have interacted with government online
- Canadians are not convinced of the empowerment potential of the Internet; fewer than one in four thinks the Internet can give them more political power or influence on government
- Information-seeking Internet users are most likely among all users to visit government and political sites
- Canadians show a strong interest in online voting (69% of Internet users)
- Opinion is divided on the need for more government control over the Internet, but among Internet users, a plurality are opposed
- There have been modest increases in the use of government services online between 2004 and 2007, mostly with respect to submitting forms and applications on the Internet

11.2 Government and Citizens Online

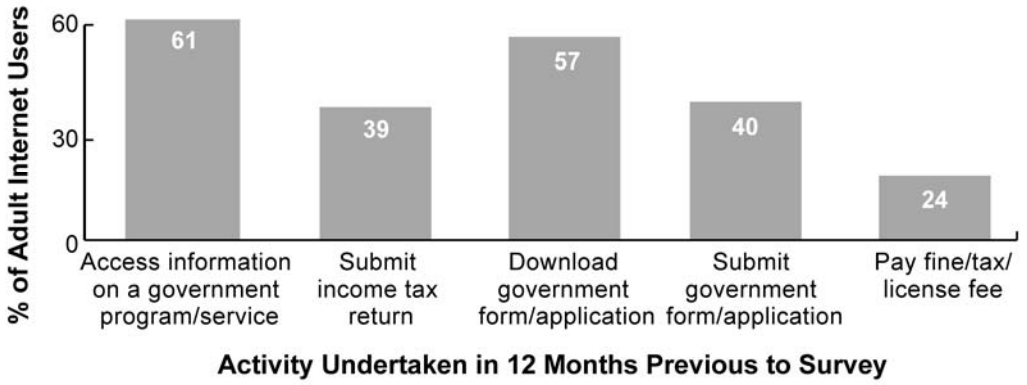
Over the past decade, the Internet has brought significant changes to the delivery of government services and the ways in which many citizens interact with government. The Internet offers convenient access to political and civic information and new opportunities for citizens to communicate with government and political actors. While the use of e-government services is relatively high and growing, civic engagement remains low and Canadians are sceptical about the empowerment potential of the Internet.

11.3 Citizen–Government Interaction

A majority of adult Internet users have accessed information about a government program or downloaded a government form (see Figure 11-1). Fewer have taken the opportunity to submit forms or pay taxes or fees and still fewer have used the Internet to communicate with government. The flow of information is still primarily from government to citizen.

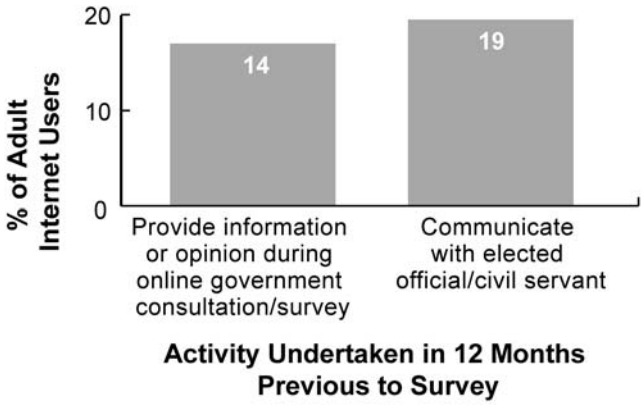
In general, the level of civic engagement remains quite low. While nearly two-thirds of adult Internet users had accessed information on a government program or service in the 12 months previous to the survey, as Figure 11-2 shows, fewer than one in five had used the Internet to provide information or an opinion to government or to communicate with an elected public official or civil servant.

Figure 11-1 Internet users and online government services accessed



CIP 2007 — C2.195–199 (Internet user respondents, 18 years +, n=2093)

Figure 11-2 Internet users' communication with government officials online



CIP 2007 — C2.200–201 (Internet user respondents, 18 years +, n=2095)

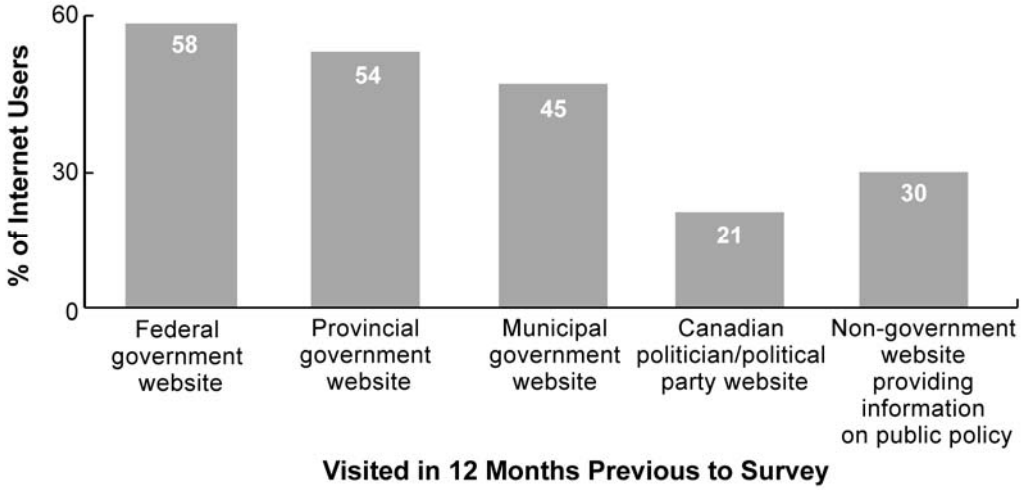
Profile of users of government information online:

- Frequent and more experienced users
- Those with higher household incomes
- Residents of British Columbia and Alberta
- Inhabitants of smaller cities
- University educated
- Employed
- Middle aged (30–44 years)

11.4 Government Websites[16]

A majority of Internet users (youth and adults) are aware of these sites and many do visit them. Political party and non-governmental policy websites do not as yet attract substantial interest. Canada is a leader in the provision of government services online but, as is discussed later, there are still many Canadians with Internet access who do not use them. As Figure 11-3 demonstrates, political websites are still of interest only to a minority of Canadian Internet users.

Figure 11-3 Visits to government or political information websites



CIP 2007 — C2.190–194 (Internet user respondents, 12 years +, n=2369)

11.5 Voting Online

If it were possible to cast a secure vote online, more than two-thirds of adult Internet users would be interested in having that opportunity (see Table11-1). This opinion is widely held. While experienced and frequent Internet users were somewhat more likely to express interest, there was majority support for the idea among all the user groups examined. Online voting is often discussed among scholars and policy makers, who, in general, are concerned about low voter turnout, especially among younger voters. These data show a general willingness, among Internet users at least, to consider online voting as an option.

11.6 The Internet and Political Empowerment

Discussions of the Internet often emphasize the potential opportunities it provides for citizens to learn about government and politics and to communicate with decision makers. Some commentators believe that access to the Internet can empower individual citizens and make government more responsive to public opinion. Most Canadians (of all ages), however, are not convinced. As Figure 11-4 indicates, only about one in four Canadian Internet users believes that the Internet can increase their political power or influence over government. Even fewer think the Internet will influence public officials to take their views into account. This level of disengagement is reflected in the pattern of one-way communication noted above.

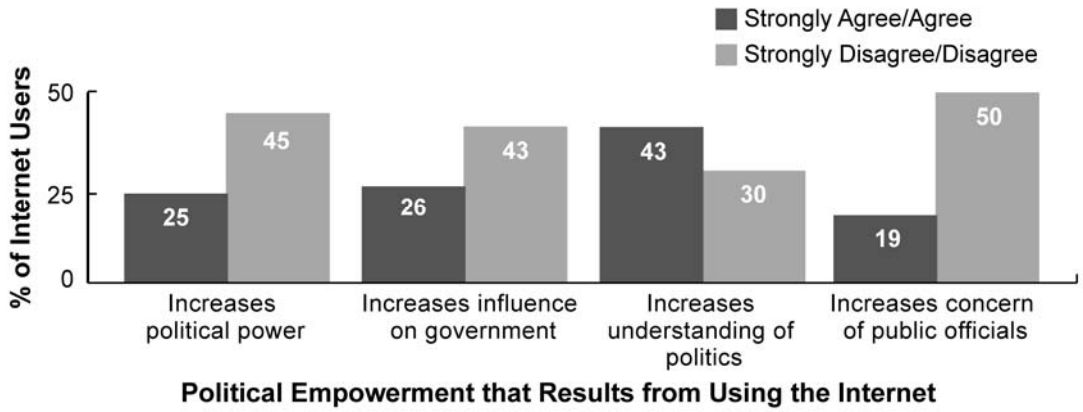
[16] It should be noted that survey data asking specifically about government websites may understate their use somewhat. When seeking information, an increasing number of Internet users rely on search engines, the result of which is that many may find themselves on a government site without knowing it.

Table 11-1 Interest in voting online across Internet user subgroups

Interest in Voting Online	Percentage Within Adult Internet User Subgroups			
	All Internet users	Light users (<5 hours/week)	Moderate users (5–<15 hrs/week)	Heavy users (15 hours+/week)
	%	%	%	%
Interested	69	60	70	74
Not interested	32	42	30	26

CIP 2007 — C2.202 (Internet user respondents, 18 years +, n=2098)

Figure 11-4 Attitudes about political empowerment and the Internet



CIP 2007 — C2.216–219 (Internet user respondents, 12 years +, n=2359)

Nevertheless, the Internet is valued as a source of political knowledge. More than 40% of Internet users think it helps them understand politics better; this view is held by more than half of those under 30 years of age, underlining the potential of the Internet as a medium for civic education.

Profile of those most likely to believe the Internet promotes political understanding:

- Students
- Internet users under 30 years of age
- Residents of Alberta and British Columbia
- Heavier and more experienced users
- Men

11.7 Civic Engagement

There are signs that the Internet is contributing to civic engagement. As Tables 11-2 and 11-3 illustrate, there is a strong relationship between civic engagement and other forms of online engagement. On almost all of the measures of civic engagement, heavy users of the Internet are more likely to participate than are light and moderate users.

Table 11-2 Civic engagement across Internet user subgroups

Form of Civic Engagement	Percentage Within Internet User Subgroups			
	All Internet users	Light users (<5 hours/ week)	Moderate users (5–<15 hours/ week)	Heavy users (15 hours +/ week)
	%	%	%	%
Visit federal government website *(C2.190)*	58	41	57	70
Visit Canadian politician/political party website *(C2.193)*	21	12	18	28
Visit non-government website providing information on public policy *(C2.194)*	30	16	26	42
Access information on a government program/service *(C2.198)*	40	34	61	73
Provide information or opinion during online government consultation/survey *(C2.200)*	14	8	12	19
Communicate with elected official/civil servant *(C2.201)*	19	11	19	23
Have interest in voting online *(C2.202)*	69	60	70	74
Agree that Internet increases political power *(C2.216a)*	26	22	21	31
Agree that Internet increases political understanding *(C2.218a)*	43	32	38	53

CIP 2007 — Various x C2.083Te (Internet user respondents, 12 years +, n=2374)

This is also true for social engagement. As discussed in previous chapters, the study created an index of Internet users related to their engagement with social networking sites online. This provides a unique measure of the level of engagement for Internet users. Three categories were defined: non-users of social networks, visitors, and visitors and contributors.

Internet users involved with online social networks, even if only as visitors, are much more likely than other users to visit government websites, seek information and use government services online, communicate with government and visit political party and non-governmental websites. They are also more optimistic about the empowerment capacity of the Internet. Although social engagement decreases with age, it is a good predictor of civic engagement in all age groups.

Table 11-3 Civic engagement across social networking subgroups

Form of Civic Engagement	Percentage of Involvement Within Social Networking Subgroups		
	Do not use social networking websites	Visit social networking websites only	Visit/contribute to social networking websites
	%	%	%
Visit Canadian politician/political party website *(C2.193)*	17	19	27
Visit non-government website providing information on public policy *(C2.194)*	24	32	43
Access information on a government program/service *(C2.198)*	57	62	74
Communicate with elected official/civil servant *(C2.201)*	12	13	22
Have interest in voting online *(C2.202)*	16	17	28
Agree that Internet increases political power *(C2.216a)*	22	24	35
Agree that Internet increases political understanding *(C2.218a)*	37	45	55

CIP 2007 — Various x C2.098Fb (Internet user respondents, 12 years +, n=2374)

Motive for going online, whether mainly for information or entertainment, is also a good predictor of civic engagement. Once again, a scale was created separating Internet users into three categories: those who use the Internet predominantly for information, those who use the Internet primarily for entertainment, and those who use the Internet equally for information and entertainment (see Table 11-4).

Those who use the Internet primarily for information seeking are more likely than those who use it for entertainment to visit government sites, use government services and even to provide their opinions on various matters for government online surveys. However, information seekers are no more likely than entertainment-oriented users to think the Internet can enhance their political power.

Overall, Internet engagement (frequency of Internet use) and social engagement (involvement with social networking sites) are better predictors of civic engagement than is information seeking as a reason for going online.

Life stage also affects civic engagement. Internet users between 25 and 59 years of age who are employed full time are more likely than others to take advantage of e-government services and channels of communication. As is shown in Table 11-5, those aged 12–29 are the most likely to turn to the Internet for help understanding politics. In other respects, however, they remain relatively disengaged, and are less likely than older Internet users to communicate with politicians or civil servants or to seek information about government policies online.

Table 11-4 Civic engagement across information-/entertainment-seeking Internet user subgroups

Form of Civic Engagement	Percentage of Information/Entertainment-seeking Internet User Subgroups		
	Predominant information-seekers online	Equally information- and entertainment-seekers online	Predominant entertainment-seekers online
	%	%	%
Visit federal government website *(C2.190)*	68	53	45
Visit Canadian politician/political party website *(C2.193)*	26	20	13
Visit non-government website providing information on public policy *(C2.194)*	37	28	20
Access information on a government program/service *(C2.198)*	68	59	50
Provide information or opinion during online government consultation/survey *(C2.200)*	16	13	11
Communicate with elected official/civil servant *(C2.201)*	24	16	8

CIP 2007 — Various x C2.175T (Internet user respondents, 12 years +, n=2374)

Table 11-5 Attitudes toward political empowerment by Internet users across age subgroups

Measure of Political Empowerment Agree that the Internet . . .	Percentage Within Internet User Age Groups				
	12–17	18–29	30–44	44–59	60+
	%	%	%	%	%
Increases political power	24	25	27	26	24
Increases influence on government	30	30	22	25	26
Increases understanding of politics	52	52	44	35	32
Increases concern of public officials	23	15	19	20	24

CIP 2007 — C2.216a–219a (Internet user respondents, 12 years +, n=2351)

In reviewing several questions on use of government websites and online services, differences were found between the most and least active provinces of up to 20%. For example, nearly 48% of Albertans filed a tax return online, compared to about 29% of Prairie residents. Internet users in British Columbia and Alberta continue to be the heaviest users of online government services. Quebec and Ontario are slightly lower than average in terms of their use of these services; the Prairies have by far the lowest level of e-government participation. There are occasional anomalies — Quebecers are most likely of all Canadian residents to visit provincial government websites — but overall these rankings hold for most services. The low rates on the Prairies reflect

generally lower levels of Internet service use in Saskatchewan and Manitoba and are, in part, a result of a lack of Internet access in smaller communities.

11.8 Government Control of the Internet

CIP asked all Canadians (Internet users and non-users) about their feelings regarding more government control of the Internet. Although many Canadians express concern about Internet abuses (discussed in Chapter 10), opinion is divided over more government control. While more than one in three support more government control of the Internet, about one in four is neutral and 36% are opposed. The major differences in attitudes toward government regulation of the Internet reflect degree of engagement with the technology. For example, while only about 30% of Internet users support regulation, nearly 60% of non-users do. It appears that Internet users are more confident about their ability to deal with Internet abuses on their own, while non-users feel a need for government intervention. Table 11-6 provides a breakdown across selected demographic categories regarding respondents' attitudes towards government control of the Internet.

Table 11-6 Attitudes toward government control of the Internet across demographic categories

Demographic and Other Categories	Percentage of Adult Respondents Supporting Government Control of the Internet	
	Strongly agree/agree	Strongly disagree/disagree
	%	%
All respondents	36	38
Internet users	30	44
Internet non-users	58	18
Language group		
Anglophone	29	43
Francophone	55	27
Region		
British Columbia	25	51
Alberta	32	44
Prairie provinces	27	39
Ontario	33	39
Quebec	53	27
Atlantic provinces	40	39
Age		
12–17	—	—

Demographic and Other Categories	Percentage of Adult Respondents Supporting Government Control of the Internet	
	Strongly agree/agree	Strongly disagree/disagree
	%	%
18–29	28	48
30–44	33	41
45–59	37	40
60+	47	25
Gender		
Male	31	47
Female	41	30
Experience online		
<6 years	35	32
6–<10 years	32	45
10–<15 years	28	48
15 years +	27	52
Level of engagement		
Light user (<5 hours)	38	32
Moderate user (5–<15 hours)	32	42
Heavy user (15 hours +)	24	53

CIP 2007 — C2.241 x various demographic variables (All respondents, 18 years +, n=2699)

Profile of those who most support government control of the Internet:

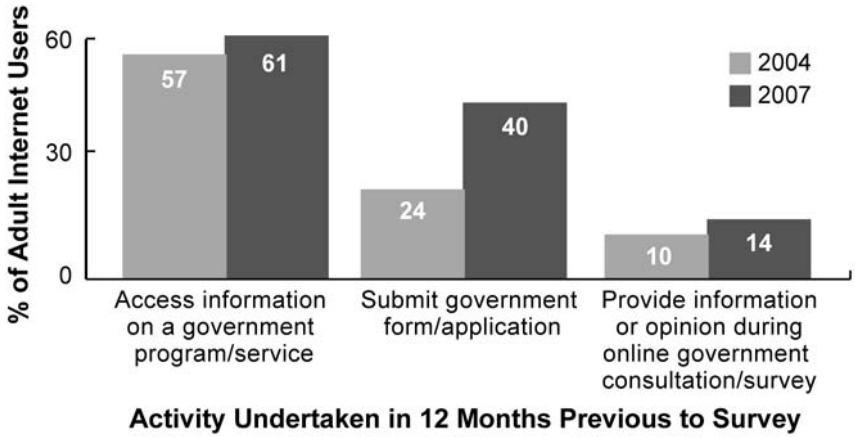
- Internet non-users
- Francophones
- Older Canadians
- Women
- Inhabitants of smaller communities
- Individuals with lower levels of education
- Canadians from lower income households
- More recent Internet users
- Those who are online less frequently

11.9 Trends: 2004 to 2007

Overall, use of government services and visits to government websites increased slightly between 2004 and 2007 and, compared to non-users, Internet users were a little more positive about the empowerment potential of being online. The largest increase was in the number who had submitted a government form or application in the 12 months previous to the survey, now at 40%.

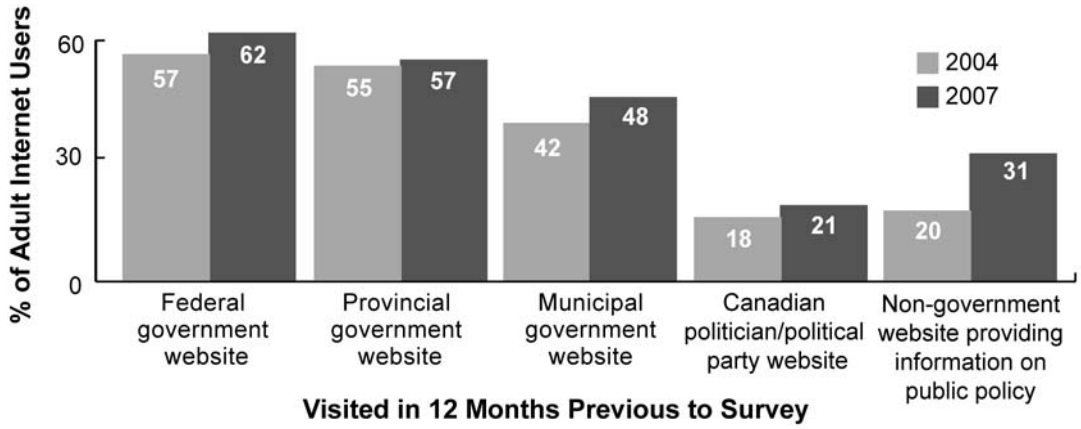
Figures 11-5 and 11-6 provide a comparison of e-government activities, as well as attitudes towards them, as reported by respondents in 2004 and 2007. Profiles of typical users of these services and of those who are positive about empowerment changed little over time. The biggest increases in civic engagement and e-government use are among groups where usage was low previously. For example, political information seeking increased dramatically among French-speaking Canadians and women, though English-speaking Canadians and men still access political sites more often. Participation rates in the Atlantic Provinces also increased. Overall, visits to non-government sites that provide information on public policy increased most. These sites are becoming better known in Canada but they are not yet a major factor in civic engagement, visited by fewer than one in three Canadians. However, more than four in ten of those who have been online longest and use the Internet most often have visited a non-government public policy site.

Figure 11-5 Government online services engaged in by Internet users: 2004 to 2007



CIP 2004 — C1.125–127 (n=2163); CIP 2007 — C2.195, 198, 200 (Internet user respondents, 18 years +, n=2093)

Figure 11-6 Visits to government and political websites: 2004 to 2007



CIP 2004 — C1.120–124 (n=2163); CIP 2007 — C2.190–194 (Internet user respondents, 18 years +, n=2093

11.10 Conclusions

While public use of e-government services is relatively high and growing, civic engagement remains low and the flow of information is primarily one way — government to public. Although there is high interest in voting online, Canadians are not in general optimistic about the empowerment potential of the Internet. Still, many Internet users believe the Internet can help them understand politics; this is especially true of younger Canadians, the vast majority of whom are online. Visits to non-government information sites increased considerably from 2004 to 2007. Civic engagement is strongly related to frequency of Internet use and, in particular, social engagement online. As Internet use increases, especially social networking, civic engagement is expected to become more widespread.

12 Canadian Culture Online

12.1 Key Findings

- Canadians are heavy consumers of various cultural content and services from offline as well as online media
- A majority of Internet users (60%) go online at least sometimes to access Canadian content, while 17% do so often
- Almost half (44%) think it is important to be able to access Canadian content online, especially for news and information
- Those who have the most experience using the Internet, are most frequent users of the Internet, engage in social networking sites most often, and are more likely than others to look for Canadian content online
- Demographically, groups that include younger Canadians, Francophones and/or those more educated are all more likely to search for Canadian content on the Internet than are those from other groups
- Close to half of all Internet users (46%) feel it is important to obtain information from Canadian sources, while one-quarter feel that it is important to obtain entertainment from Canadian sources
- Principal reasons for not seeking out Canadian content online are lack of interest and a feeling that selection based on origin of content is neither relevant nor useful
- The Internet is perceived as an important source of both information (55%) and entertainment (45%)
- Canadians rely greatly on media that typically contain significant amounts of cultural content, spending an average of 11 hours per week watching television and the same amount of time engaged in online activities from home
- Entertainment activities attractive to younger Internet users are playing video games (23% play at least weekly), downloading or listening to music (54% at least weekly) and watching videos (38% weekly)
- Online use of entertainment and cultural information has increased considerably since 2004
- Interest in Canadian content has slightly declined since 2004, but opinion on the desirability of Canadian content online has remained stable
- Canadian Internet users are less positive about the quality of Canadian cultural content online than they were in 2004, but perceptions of the availability and accessibility have improved since that time
- Across all age groups (88%), the Internet is used with greatest frequency as an entertainment activity for general surfing or browsing
- The experience of being online — generally surfing and browsing, or sampling — appears to have a high level of attraction for most Internet users, and may be as appealing as content itself for many

12.2 Canadian Cultural Consumption

Canadians are heavy consumers of various forms of fine arts and popular culture, both offline and online. Wide access to broadband has created opportunities for cultural industries to deliver traditional products and services in new ways and to reach yet larger audiences.

Even as Canadians reach out to the world for information and entertainment, a significant number remain specifically interested in Canadian cultural content. To put the survey questions in context, cultural content was defined as “movies, television, books, music, magazines, [and] museum and

art exhibits," with special reference to those "developed in Canada." The survey also asked about playing video games, music consumption and general online browsing activities.

As revealed in Chapters 6 and 7, Canadians spend a great deal of time engaged with various forms of culture. During a typical week, the vast majority of Canadians watch a considerable amount of television (an average of almost 11 hours per week),[17] listen to the radio, read a newspaper, magazine or book, view a movie and listen to recorded music. More than one in three sometimes attend a live performance of some kind. On average, about one-third of the time Canadians devote to cultural consumption in an average week is spent with moving images (television, movies, videos, video games), about one-quarter of media time is spent with audio content and nearly one hour in every five with print materials (mostly books). Canadians spend, on average, approximately 11 hours per week online at home (and 17 hours per week in all locations), divided among many activities, a significant proportion of which involves consuming cultural content.

12.3 Culture Online

Canadian Internet users attend to a wide range of entertainment-related cultural materials online. As shown in Table 12-1, about 45% rank the Internet as important for entertainment. Among conventional media, only television and books ranked higher. Interpersonal referrals are the most frequent source used to find entertainment on the Internet.

Table 12-1 Importance of various media as sources of entertainment

Media Source	Importance for Entertainment		
	Very important/ Important	Neutral/Undecided	Not important/ Not at all important
	%	%	%
Internet	45	18	37
Television	60	23	18
Newspapers	28	24	48
Radio	42	27	31
Interpersonal sources	76	15	9
Books	52	20	28
Magazines	23	27	50

CIP 2007 — C2.050a–056a (All respondents, 12 years +, n=3037)

Online cultural activities that attract a majority of adults are listening to/downloading music and reading/downloading newspaper and magazines. Table 12-2 provides a breakdown of entertainment-related activities undertaken on the Internet. In a typical week, more than one in three play games online and watch videos and 42% visit television station/program websites. Surprisingly, the most frequently reported activity for online entertainment is general surfing or browsing on the Internet, as opposed to seeking out specific destinations or content. Of all

[17] The average time watching television for adults (18 years and older) is 11.3 hours per week. For youth (aged 12–17) the average is 7.6 hours per week.

Internet users, 88% — the highest level compared to other media and activities — report that they engage in this activity on at least a weekly basis.

This "sampling" behaviour appears to be widespread and consistent in the online activities of Canadians, and is perhaps indicative of the changing patterns of consumption brought about by emerging activities. Certainly, sampling of content has been evident for decades through the use of the television remote control device. However, the digital transmission and storage capacity of the Internet offers much greater opportunity to search for and access material or content online, and there is an abundance of choice. In fact, it appears that many Canadian Internet users find this activity — directionless discovery — appealing in itself. Its potential impact on consumption of cultural content is considerable, as the experience of using and sampling media rather than attending to specific content is increasingly becoming a part of online engagement for Canadians. The traditional approach to audiences for cultural content focuses on "consumption" of cultural materials. Perhaps it is more appropriate to reflect on cultural "experiences," such as general browsing and surfing online. This paradigm of online engagement raises questions about how to conceptualize cultural specificity in the context of the online experience.

Other pervasive online entertainment activities engaged in by adults are reading newspapers or magazines, accessing music, playing games and visiting television station or network websites.

Table 12-2 Proportion of adults who engage in entertainment-related activities online

Entertainment-related Online Activities	Percentage of Adult Internet Users Across Various Incidence Categories		
	Adoption level (all incidence)	Weekly or more often	Monthly or more often
	%	%	%
Play games	37	22	30
Download/listen to music	52	23	36
Download/watch videos	35	19	27
Listen to radio stations	39	17	27
Generally surf/browse online	88	68	79
Look at sexual content sites (18 years +)	20	6	12
Download/stream/watch DVDs/movies	18	7	13
Download/stream/watch television	16	7	11
Download/listen to podcasts	16	5	9
Download/read newspapers/magazines	49	26	37
Download/read books	15	4	9
Visit television program websites	42	10	27
Visit television station/network websites	48	21	35

CIP 2007 — C2.140F–154F (Internet user respondents, 18 years +, n=2098)

As shown in Table 12-3, popular activities for youth (ages 12–17) are downloading music, playing games, surfing the Internet and downloading videos. Their preferences are predominantly for entertainment. Similar to adults, the most prevalent activity that youth engage in online for entertainment is general surfing and browsing (88%). For a more detailed analysis of online entertainment activities, see Chapters 6 and 7.

Table 12-3 Proportion of youth who engage in entertainment-related activities online

Entertainment-related Online Activities	Percentage of Youth Internet Users Across Various Incidence Categories		
	Adoption level (all incidence)	Weekly or more often	Monthly or more often
	%	%	%
Play games	85	23	45
Download/listen to music	86	54	75
Download/watch videos	79	38	68
Download/stream/watch DVDs/movies	39	9	20
Download/stream/watch television	24	5	11
Listen to radio stations	27	11	21
Generally surf/browse online	88	71	82
Download/listen to podcasts	17	7	11
Download/read newspapers/magazines	27	10	19
Download/read books	15	6	10
Visit television program websites	45	13	34
Visit television station/network websites	37	14	27

CIP 2007 — C2.140F–154F (Internet user respondents, 12–17 years, n=384)

The Internet is also important for the dissemination of information on cultural events and content. As shown in Table 12-4, almost two in three respondents look for information on cultural events in a typical week (festivals, art exhibits, museums, plays and so on). Nearly as many look for information about movies and concerts. Many seek these kinds of information regularly.

12.4 Canadian Culture Online

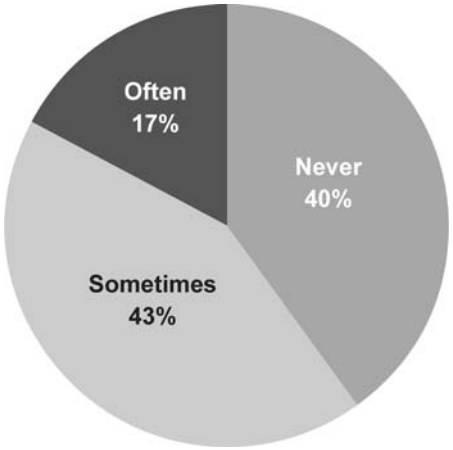
While the vast majority of Canadian Internet users view the Internet as a vital window to a globalized world, a considerable number also hope to find Canadian cultural content online. Nearly 60% of Internet users look specifically for Canadian content at least sometimes when they are online.

Table 12-4 Proportion of Internet users who engage in information-related activities online

Information-related Online Activities	Percentage of Internet Users Across Various Incidence Categories		
	Adoption level (all incidence)	Weekly or more often	Monthly or more often
	%	%	%
Look for news	79	55	68
Read blog or weblog	36	18	25
Look for jokes/cartoons/humorous content	46	20	33
Look for sports information	45	25	36
Look for information on music/concerts	63	18	38
Look for information on books/authors	61	19	43
Look for information on cultural events	69	19	49
Check movie schedules	65	48	48
Search for information about performers/musical artists	62	43	43

CIP 2007 — C2.123F–138F (Internet user respondents, 12 years +, n=2373)

Figure 12-1 Frequency with which Internet users look for Canadian content online



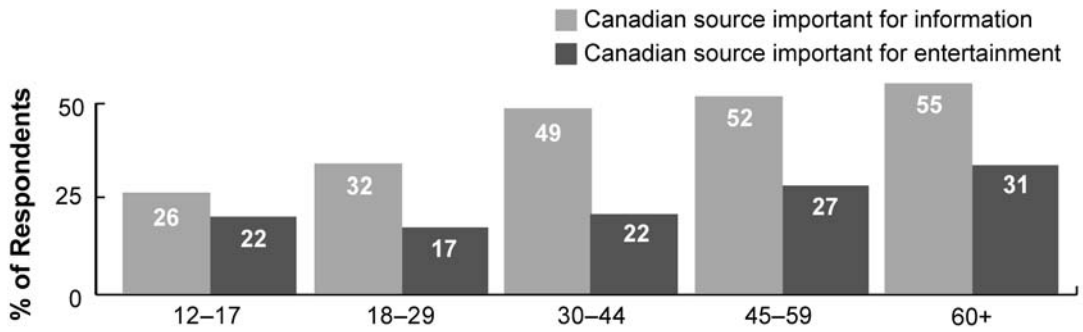
CIP 2007 — C2.181a (Internet user respondents, 12 years +, n=2363)

Profile of those most likely to look for Canadian content online:

- More frequent and experienced Internet users
- Those in the 12–17 and 25–34 age groups
- Francophones
- Those with higher levels of education
- Those who frequently engage in social and community networks online

Close to half of all Canadians reported that it is important to them to be able to obtain information from Canadian sources, while only 25% say it is important to have access to Canadian-produced entertainment. The largest group of respondents, 45%, are neutral or have no opinion about the importance of obtaining entertainment from Canadian sources. The remaining 30% are clear that the origin of their entertainment is not important. Fewer than one in five say the origin of information is not important. While reliance on culturally significant information and news is important to Canadians, most are ambivalent about the cultural specificity of entertainment content or say that it is not important to them. Figure 12-2 provides a breakdown of those who feel Canadian sources are important for information and entertainment, across age subgroups.

Figure 12-2 Importance of obtaining information and entertainment from Canadian sources across age subgroups



CIP 2007 — C2.236 (All respondents, 12 years +, n=2933)

Internet users are somewhat less concerned about having access to Canadian content than are non-users. Among Internet users, those who spend more time online are more likely to want Canadian content.

Of all Canadians, 44% think it is important to be able to get Canadian content for either information or entertainment and one in three say that they are not concerned about the national origin of either form of content. About 25% are concerned about the origin of informational content but not entertainment. It is important to note that about one in four Canadians are neutral or have no opinion.

Profile of those who want more Canadian content online:

- Frequent Internet users
- Those with access to broadband
- Older Internet users (aged 45–54)
- French-speaking Canadians
- Residents of Quebec

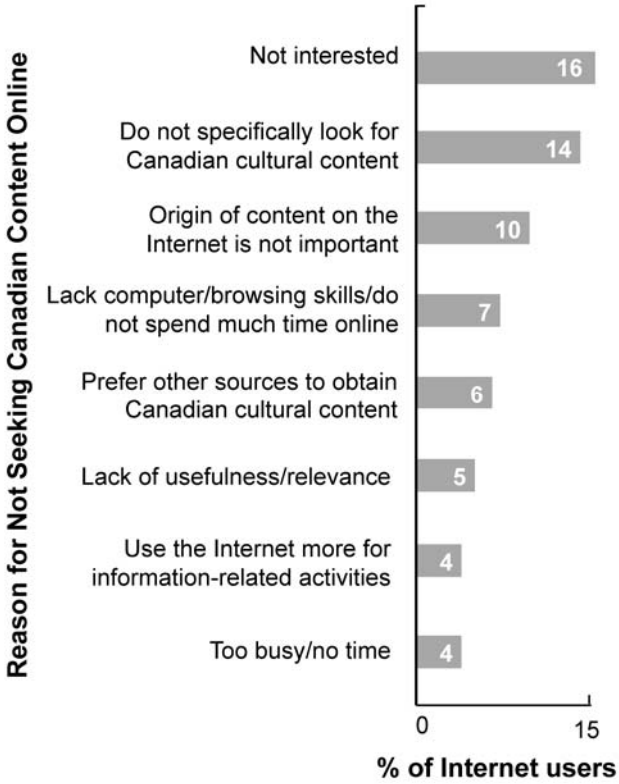
Perhaps what is most striking in analyzing the distribution of Canadian's attitudes regarding the importance of Canadian content is the weakness of the standard relationships found elsewhere in this study. While there are some significant differences by age, the differences between the youth and adult samples and between users and non-users do not reach the study's statistical significance threshold of .01. It appears that the factors underlying attitudes towards Canadian content online are not captured by standard demographic categories. The differences between heavy and light Internet users are significant, but slight. For example, 29% of heavy Internet users think there should be more Canadian content online, compared to 19% of light users. As stated in earlier chapters, it may be the case that those with greater propensity to use media

simply use all media — including media considered to provide culturally significant content — much more than do others.

Nearly half of those who never seek Canadian content online — about one in four Internet users — say they have no special interest in Canadian material or feel that the origin of content on the Internet is not important. About one in three agrees with the statement, "when online, I do not care if the cultural content I search for is Canadian," but almost as many indicate that they do care about the origin of the content they consume.

The most prevalent reasons provided by those who do not look for Canadian content online are a lack of interest in Canadian content specifically, and an overall feeling that country of origin is not important when choosing what to consume (see Figure 12-3). Among those who never seek out Canadian content online, more than one-third report that the question of nationality is not useful or important to them.

Figure 12-3 Reasons given for not seeking Canadian content on the Internet



CIP 2007 — C2.182m1–m3 (Internet users who do not seek Canadian content online, 12 years +, n=821)

When compared across demographic categories, the reasons for not seeking Canadian content online are sufficiently diverse that only a few statistically significant relationships emerged from the analysis:

- Older Internet users are more likely to value Canadian content than are younger users but also to say they do not actively look for it online (one in five older than 65)

- About one in three French-speaking Canadians who does not look for Canadian content online say that it is because she/he has no interest in it
- Those with more formal education are less likely than those without to say they have no interest in Canadian content

Interestingly, French-speaking Internet users are among those most likely to seek out Canadian content. These apparently contradictory findings indicate that this group is the most polarized when it comes to Canadian content.

To assess public attitudes toward Canadian content online, Internet users were asked to agree or disagree with a series of statements:

- It is hard to find Canadian cultural content online.
- Canadian cultural content on the Internet is very good.
- There is not enough Canadian cultural content on the Internet.
- When online, I find it difficult to distinguish what cultural content is Canadian.
- When online, I do not care if the cultural content I search for is Canadian.
- I am pleased with the diversity of Canadian cultural content found online.

The responses are summarized in Table 12-5.

Table 12-5 Attitudes of Internet users toward online Canadian cultural content

Attitude Toward Canadian Cultural Content Online	Percentage of Internet Users		
	Disagree	Neutral	Agree
	%	%	%
Difficult to find	32	47	21
Quality is good	16	58	26
More is required	21	54	25
Difficult to distinguish	37	43	30
Do not care if Canadian	28	41	31
Satisfied with diversity	18	56	26

CIP 2007 — C2.184a–189a (Internet user respondents, 12 years +, n=2324)

While many are neutral, more than half of those with an opinion think the quality of Canadian content online is good and that there should be more. A considerable number find Canadian content difficult to distinguish from other online content and about one in five thinks it is hard to find. Those who do look for Canadian content tend to believe it is distinctive, of good quality and not hard to find. Older Internet users are more likely than others to say they are neutral or have no opinion on all of these measures.

While only about 16% of Canadian Internet users are prepared to say that the Canadian cultural content online is not of good quality, it is notable that nearly six in ten do not have an opinion. It is reasonable to conclude from these findings that a majority of Canadians do not usually think about the source of the content, especially entertainment-oriented content, when they go online. Yet a considerable number report they have specifically looked for Canadian content online, suggesting that origin of content remains relevant and meaningful to some.

According to the findings reported in Table 12-6, when looking for Canadian content online most users employ one of the popular search engines. Only about one in 20 goes to a specific cultural portal or other arts website. About 12% search online news media sites. Those most likely to use a specific cultural portal are better educated, and are frequent and experienced Internet users. Residents of the Prairie provinces are slightly more likely than average to access a cultural portal to look for Canadian content. Even those predisposed to seek out Canadian content only marginally use specific search engines and portals to obtain it.

Table 12-6 Methods used to find Canadian content online

Method Used	Percentage of Internet Users Across Subgroups		
	All Internet users	Adults (18+)	Youth (12–17)
	%	%	%
Typical search engine (Google/Yahoo/etc.)	89	89	92
Online media (newspaper/magazine/television website)	12	13	6
Specific cultural portal (culture.ca/artscanada.com)	3	4	0
Specific website/blog/wiki	1	1	4
Government website	2	1	2
Community/social networking website	1	1	4
Other website	1	3	3

CIP 2007 — C2.183m1–o2 (Internet user respondents who seek Canadian content online, 12 years +, n=1193)

12.5 Who Cares about Canadian Content?

Not surprisingly, there is a strong relationship between those who seek Canadian content and those who think it is important to be able to access it online. This group regards Canadian content as important for both information and entertainment, considers its quality to be good and thinks more should be available online.

On many of these measures, Internet users who are deeply engaged with the Internet — those who are frequent and experienced users — are more likely than are other users to look for Canadian content online and to value it, especially for news and information (see Table 12-7). Users who attend live cultural events or are active in social networking are also more likely to look for Canadian content than users who don't engage in these activities.

In general, concern for Canadian content increases with age, especially with respect to information. Nevertheless, even among those in the 12–17 age group, approximately one in four feels it is important to be able to access Canadian content for information and entertainment.

As Table 12-8 demonstrates, regional differences in attitudes toward Canadian content are notably high. Quebecers, compared to residents from other provinces and regions in Canada, are more likely to look for Canadian content, to regard it as important for entertainment and to agree that "Canadian cultural content on the Internet is very good."

Residents of the Prairie provinces tend to accord less importance to Canadian content, even though more than one in four do care if cultural content online is Canadian, just about the national average.

Table 12-7 Partiality of Internet user subgroups for Canadian content online

Attitude/Behaviour Measure	Level of Engagement *(C2.083Te)*			
	All Internet users	Light (<5 hours/ week)	Moderate (5–<15 hours/ week)	Heavy (15 hours +/ week)
	%	%	%	%
Often/sometimes seek Canadian content online *(n=2363)*	60	43	52	69
Strongly agree/agree more Canadian content is required *(n=2266)*	25	19	23	29
Extremely important/important to obtain news from Canadian sources *(n=3008)*	46	40	43	50
Attitude/Behaviour Measure	**Engagement with Social Networking Websites** *(C2.098b)*			
	Never use	Visit only	Visit and contribute	
	%	%	%	
Often/sometimes seek Canadian content online *(n=2363)*	53	63	77	
Strongly agree/agree more Canadian content is required *(n=2266)*	22	25	33	
Extremely important/important to obtain news from Canadian sources *(n=3008)*	43	43	49	

CIP 2007 — C2.181a, 186a, 236a (Internet user/All respondents, 12 years +

Table 12-8 Attitudes towards Canadian cultural content online across regions

Respondent Subgroup	Quality is good	More is required	Care if Canadian
	(C2.185a, n=2258)	*(C2.186a, n=2266)*	*(C2.188a, n=2324)*
	%	%	%
All respondents	**26**	**25**	**28**
Region			
British Columbia	20	24	31
Alberta	29	23	27

Respondent Subgroup	Quality is good	More is required	Care if Canadian
	(C2.185a, n=2258)	*(C2.186a, n=2266)*	*(C2.188a, n=2324)*
	%	%	%
Prairie provinces	20	17	27
Ontario	25	25	27
Quebec	32	27	27
Atlantic provinces	29	28	33

Respondent Subgroup	Satisfied with diversity	Easy to distinguish	Important for entertainment to be Canadian
	(C2.189a, n=2291)	*(C2.187a, n=2293)*	*(C2.237a, n=3012)*
	%	%	%
All respondents	**26**	**27**	**25**
Region			
British Columbia	19	27	22
Alberta	21	23	23
Prairie provinces	18	27	18
Ontario	21	27	21
Quebec	35	30	38
Atlantic provinces	24	25	22

CIP 2007 — various (Internet user respondents; C2.237a = All respondents, 12 years +)

Women are more concerned than are men with accessing Canadian-produced entertainment. Internet users in the 25–34 age group are the most likely to search for Canadian content online, but those aged 45–64 are more likely to call for increased Canadian content.

With respect to assessing Canadian content online, age does not emerge as a significant factor. Interestingly, third language groups and immigrants prove to be as interested in Canadian content online as are Internet users born in Canada. It is also notable that Internet users who go online primarily for entertainment are only slightly less likely to seek Canadian content than are those who go online primarily for information.

12.6 Trends: 2004 to 2007

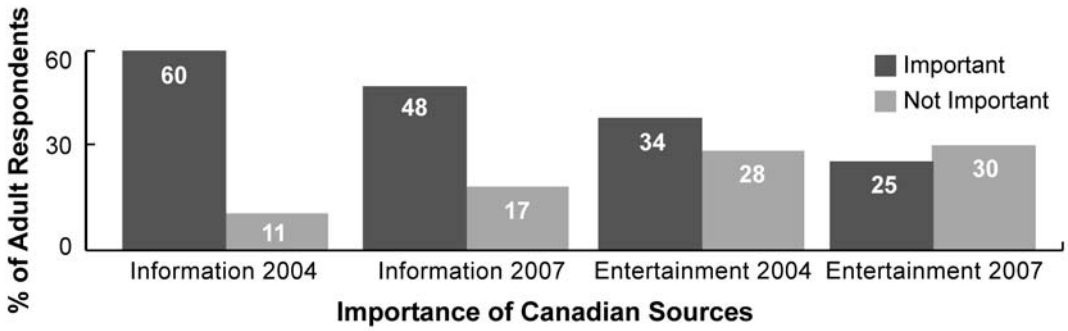
In the competition for attention between online and offline media, the Internet continues to increase its share. As discussed in Chapter 6, since 2004, time spent on online media has increased significantly and time spent on offline media has declined. Television watching, listening to music, reading books and playing offline video games have all declined, while time spent online at home has increased substantially. Time spent watching movies at home and reading newspapers and magazines are both up.

The online activities that have shown the most growth are playing games online, listening to radio stations and downloading music, and downloading movies, television shows and books. Visiting television websites, both program and station or network sites, has also become more popular.

These data suggest that, in most cases, the decline in a particular activity offline is matched by an increase in a similar activity online. While popular new activities, such as social networking, are attracting Internet users, much of the leisure time shift from traditional media to the Internet can be attributed to changes in how users access cultural information and entertainment content. As discussed, the Internet may now be seen as both a platform and an experience in itself.

As illustrated in Figure 12-4, in 2007, 42% of Canadians — and 52% of Internet users — ranked the Internet as an important source of entertainment, an increase of nearly 20% from 2004. In 2007, nearly three in ten regarded newspapers as important for entertainment; in 2004, they were valued mainly as sources of information. In both cases, but particularly in the case of the Internet, this shift in perceptions reflects the growth of broadband connectivity and the greater availability of entertainment-oriented content.

Figure 12-4 Importance of obtaining information and entertainment from Canadian sources: 2004 to 2007



CIP 2007 — C2.182m1–m3 (Internet users who do not seek Canadian content online, 12 years +, n=821)

There has been a striking increase in Internet users looking for cultural information online. In 2004, on average, about four in ten users reported looking for cultural information online: information about concerts, cultural events, plays, movies, books and so on. Currently, more than two-thirds engage in this kind of search and four in ten do so at least monthly.

The number of Canadians who look for Canadian content online has remained steady at about six in ten. However, “often” seeking Canadian online has almost doubled, from 11% to 20%.

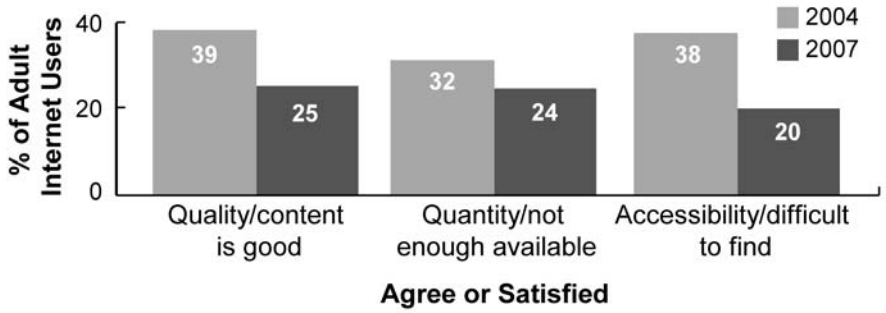
Concern about finding Canadian cultural content online has declined since 2004. Currently about 50% think it is important to get news and information from Canadian sources, a decline of about 10%. For entertainment, about 25% regard Canadian content as important, down from 34% in 2004. There is no obvious reason for this decline.

Opinions about the accessibility and quality of Canadian content online appear to be unchanged since 2004 (with between one-quarter and one-third giving positive answers and the majority not having an opinion).

Finally, in both 2004 and 2007 the survey included several attitudinal questions about Canadian cultural content online. Unfortunately, the questions in each year were not identically structured

and thus comparisons should be interpreted cautiously. In 2004, respondents were asked about their satisfaction level with the quantity, quality and accessibility of Canadian cultural content online. In 2007, respondents were asked whether they agreed or disagreed with related statements that measured similar attitudes. Figure 12-5 provides a breakdown of these findings.

Figure 12-5 Attitudes of Internet users toward online Canadian cultural content: 2004 to 2007



CIP 2004 — C1.117r–118r (n=1781); CIP 2007 — C2.184a–186a (Internet user respondents, 18 years +, n=1994)

Overall, the data in Figure 12-5 indicate a decline since 2004 among Internet users across various measures ranking the quality, quantity and availability of Canadian content. There has been a 14% drop in those who agree that available Canadian content is good or that they are satisfied with its quality (from 39% to 25%). In 2007 fewer are concerned about its availability and accessibility than were in 2004. It appears that users are more readily identifying Canadian cultural content online, are not as concerned with opportunity to access it, perceive increases in its quantity and accessibility, and yet feel even more strongly that the content is not as good as they would like. Because the questions asked in each year were not identical, these results must be treated with caution, but it appears that overall Canadian Internet users are more satisfied with the Canadian cultural content they find online than they were in 2004. More detailed, qualitative research will be necessary to assess these trends.

12.7 Conclusions

Canadians are heavy consumers of media and cultural content, both offline and online. Users' consumption of online cultural content and conventional media — television, radio, movies — has grown considerably. While the Internet has taken time away from some traditional media, it has also provided a new channel for their delivery. For many users, time online displaces time with family rather than time with other media. In general, online media use tends to complement rather than displace offline media use. (See Chapters 6 and 7 for more detailed discussion of these issues.)

Canadians are divided in their opinions about the value, quality and need for Canadian content online, but a majority look specifically for Canadian content online at least sometimes. This is particularly true of the most engaged Internet users. The vast majority seek Canadian media through common online portals — search engines and online media — rather than through specific portals or websites.

The Internet has created a new and challenging environment for Canadian cultural content. A staunch minority of Canadian Internet users actively pursues Canadian content online, and most Canadians show little or no hostility to culturally specific content. However, the analytic power of

the consumption paradigm is declining as more Internet users experience the online world as a place for experience or interaction. What appears to be a decline in concern for Canadian cultural content online may in fact be a different way of perceiving the online experience in which cultural specificity of content is becoming less important to many Internet users. This is clearly a matter for further study.

13 Consumer Behaviour on the Internet

13.1 Key Findings

- Nearly half of Canadian Internet users have purchased a product or service online (48%) and more than one in three reported buying something online within the month previous to the survey (38%)
- Fifteen percent of Internet users (more than one-third of those who bought something online) made more than one purchase the month prior to when the survey was conducted
- For those who buy online the average number of purchases was 2.4 items per month
- Looking online for information on products and services is the most popular e-commerce activity (77% of Internet users), indicating broad awareness of the online marketplace
- Almost everyone who has made a purchase on the Internet has also researched products and services online
- Three of every four Internet users who conduct online product research make their ultimate purchase in-person from a local retailer (77%) (i.e., not online)
- Books, stocks and bonds, clothes, music, and travel arrangements are the most frequently purchased goods and services online
- The most commonly downloaded item is music (57%)
- Impediments to online shopping include concern about the security of financial information and worries about offshore vendors
- Concern about the security of financial information online has declined slightly since 2004
- A majority of online purchasers prefer Canadian vendors specifically (59%), while three in ten use Canadian and American sites equally (31%)
- More experienced, more frequent users, and those most comfortable with new technologies, are least concerned about security for online commerce, but concern remains quite high across most demographic categories
- Only 13% of those online have paid to download content from the Internet
- Almost half of all Internet users (47%) have found ways to download content available for a fee online without paying for it
- Of all Internet users, 23% report that they download from a file-sharing service such as BitTorrent or Kazaa[18]
- Nearly seven in ten Internet users are willing to accept advertising online, especially men and those under 45 years of age
- Since 2004, the percentage of users buying online has not changed much, but there has been a considerable increase in the amount and frequency of online commerce

13.2 Online Marketplace

A majority of Canadian Internet users participate in the online marketplace in one way or another. E-commerce is an important aspect of online life for many Internet users. This chapter examines how Canadians use the online marketplace, what they tend to purchase and some issues that might be inhibiting the growth of e-commerce.

Table 13-1 provides a summary of responses to various questions related to consumer behaviour online. Nearly half of Canadian Internet users (48%) have purchased a product or service online and 38% reported buying something online in the previous month. About 15% of Internet users (four in ten of those who bought something) made more than one purchase in the month before

[18] This adoption level may be an underestimate of actual behaviour due to possible hesitation or concern by respondents admitting to this practice in the interview

the study was conducted. The average number of purchases reported by online consumers was 2.4 in a typical month.

Table 13-1 Summary of responses regarding consumer behaviour online

Online Consumer Behaviour	Percentage Across Various Incidence Categories			
	Question/ respondents	Adoption level (all incidence)	Weekly or more often	Monthly or more often
		%	%	%
Get information on products online	*(C2.204, n=2088)*	77	37	63
Buy things online	*(C2.205, n=2085)*	48	5	19
Make travel reservations/bookings	*(C2.206, n=2080)*	51	2	16
Pay bills online	*(C2.207, n=2088)*	58	31	55
Bank online	*(C2.208, n=2087)*	64	47	60
Make investments online (not RSP)	*(C2.209, n=2084)*	14	3	8
Make RSP investments online	*(C2.210, n=2081)*	20	6	13
Visit auction sites/eBay	*(C2.131, n=2095)*	46	14	30
		At all	**Sometimes**	**Often**
Search online, then purchase at local store	*(C2.212, n=2087)*	77	27	32
		Reduced	**Reduced somewhat**	**Reduced a lot**
Online commerce has reduced local store purchases *(online purchasers only)*	*(C2.213, n=783)*	55	44	11

CIP 2007 — various (Internet user respondents, 18 years +)

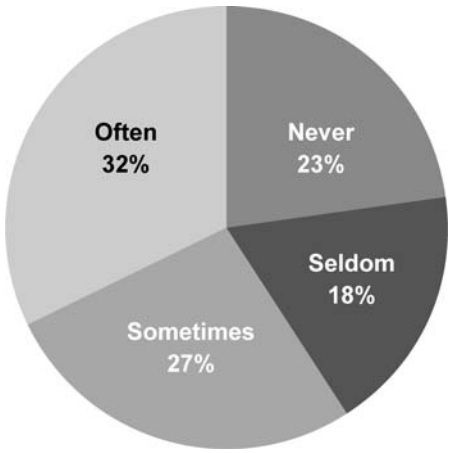
13.3 Looking and Buying

By far the most popular use of the Internet in relation to shopping is to get information on a product or service. More than three in four engage in this practice and nearly two in three do so at least once a month. Clearly, most Internet users are aware of the online marketplace and "window shop" regularly. In fact, 46% of adult Internet users have visited an auction site, such as eBay, and about one-third of Internet users visit an auction site at least monthly. About half of all users buy things online, unchanged since 2004, and about one in five do so in a typical month (though nearly two in five bought something in the month previous to the survey). Nearly two-thirds bank and almost six in ten pay their bills online and most do so regularly.

The relationship between seeking product information online and actually buying online is revealing. Almost everyone who buys online also searches for product information online, but more than four in ten of those who search for product information online "never" buy online. In

fact, as indicated in Figure 13-1, more than half of those who regularly search for product information on the Internet often make their actual purchase in-store from local retailers. Only about one in ten who research products online never makes their purchase at a retail store.

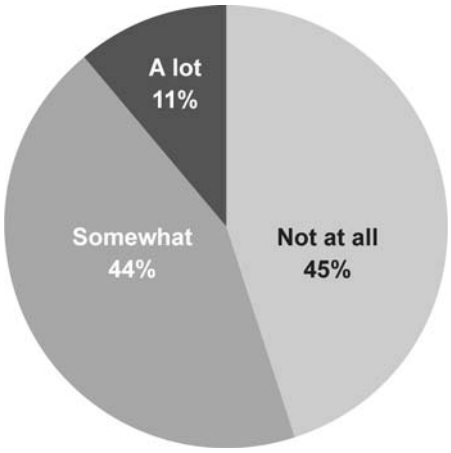
Figure 13-1 **Frequency of online product research and subsequent purchase from a local store**



CIP 2007 — C2.212 (Internet user respondents, 18 years +, n=2087)

Of Internet users who have made a purchase online, 55% say that online buying has reduced their purchasing at local retail stores. However, only one in ten says that it has reduced spending at local retailers “a lot.”

Figure 13-2 **Effect of Internet shopping on local store purchases**

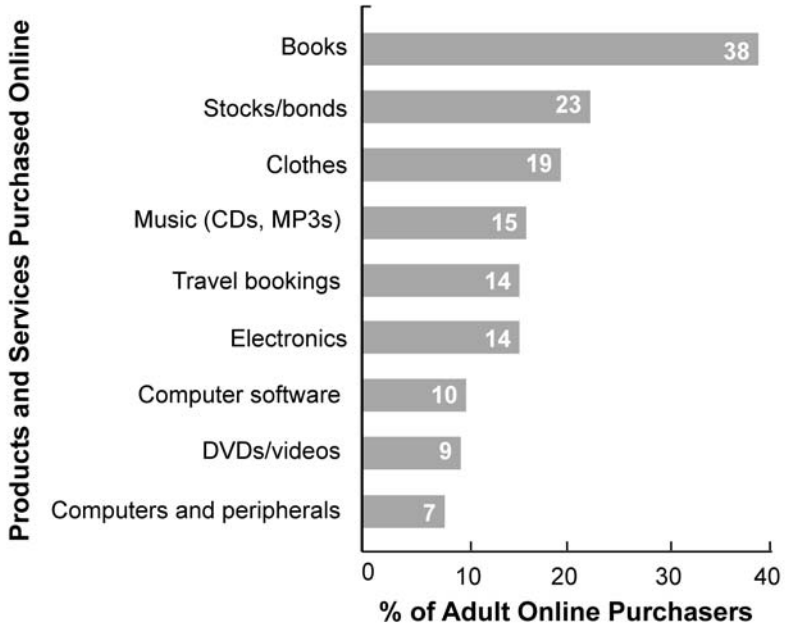


CIP 2007 — C2.213 (Internet user respondents who have purchased online, 18 years +, n=2087)

Books, stocks and bonds, clothes, music, travel bookings, electronics and computer software are the most commonly purchased items online. The range of goods and services, as described in Figure 13-3, has widened since 2004 and the proportion of Internet users who have made a purchase in most of these popular categories has gone up over the past few years.

Auction sites are an important element of the online marketplace. Seven in ten of those who buy things online have visited an auction site, indicating that auction sites are part of their shopping routines. Internet users who visit auction sites are much more likely than other Internet users to report that online purchasing has reduced their shopping in local retail stores. Those who are more likely than average Internet users to visit auction sites are English speakers (49%), heavy Internet users (45%), males (55%) and those in households from the highest income quartile (53%).

Figure 13-3 Products and services purchased online



CIP 2007 — C2.211m1–o2 (Internet user respondents who have purchased online, 18 years +, n=749)

A host of commercial opportunities is available online and many Canadians take advantage of them. As has been seen, many people are fairly regular consumers of these services. Nevertheless, there remains considerable room for growth. A fairly high proportion of online shopping is ”window shopping.”

13.4 Security of Financial Information

One impediment to further growth of online commerce might be concern about the security of financial information online. Table 13-2 shows the level of respondents’ concern across various subgroups: all respondents, Internet users and non-users. Most Canadians worry about the possible misuse of their credit card or banking information as a result of online transactions. The level of concern is higher among Canadians who do not use the Internet than it is among users, probably because users are more familiar with online financial transactions. Three in ten of Internet users are extremely concerned about financial security online, whereas four in ten non-

users share the same trepidation. Indeed, as the results in Table 13-2 illustrate, nearly six in ten across all respondent subgroups are very concerned or extremely concerned about this issue.

Table 13-2 Concern for financial security online across respondent subgroups

Concern about Financial Information Online	Percentage of Respondent Subgroups		
	All respondents	Internet users	Internet non-users
	%	%	%
Not at all/not very concerned	9	8	10
Somewhat concerned	30	34	14
Very concerned	26	26	27
Extremely concerned	32	30	40
No credit card	3	2	9

CIP 2007 — C2.070 (All respondents, 18 years +, n=2710/2091)

Additionally, CIP analysed concern about financial security among those who purchase selected products and services and those who do not. The results are provided in Table 13-3. Not surprisingly, those who have purchased products via the Internet are much more comfortable and confident in financial security online. Those who never visit auction sites or purchase products and services online are the most likely to worry about the security of their financial information. Regular users are the least likely to be "very or extremely concerned." This pattern holds for the full range of online transactions and is related to overall comfort with the Internet.

Table 13-3 Differences in concern for financial security online between those who purchase selected products and services and those who do not

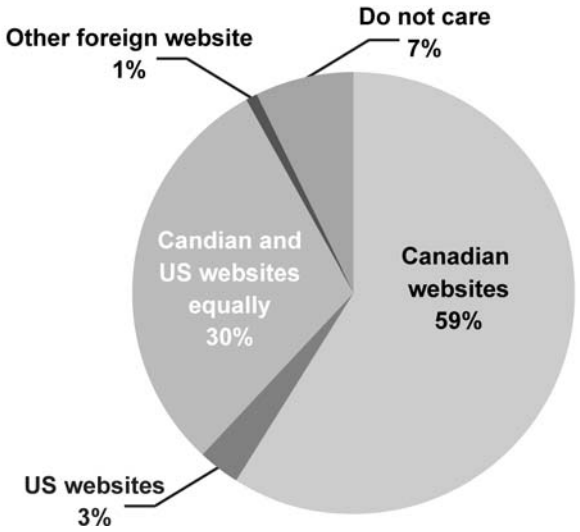
Online Consumer Activities	Percentage of Internet Users Very Concerned About Financial Security Online	
	Buy/use product or service	Do not buy/use product or service
	%	%
Buy things online	42	69
Make travel reservations/bookings	48	64
Pay bills online	46	69
Bank online	47	72
Make investments online (not RSP)	47	58
Make RSP investments online	48	58
Visit auction sites/eBay	38	61

CIP 2007 — C2.205–210, 131 (Internet user respondents, 18 years +, n: see Table 13–1)

Internet users most likely to be active in the online marketplace are those who are most comfortable with the Internet, that is, more experienced and more frequent users. Although age and education are related to these measures, these users are represented in every age group. Those who have used the Internet online longer and who tend to be online more often are also somewhat less likely to be worried about online security than are less experienced and less frequent users.

Concern about online security and confidence in vendors may be one of several factors explaining preference among those who do shop online to deal with North American sites. Nearly nine in ten prefer to deal with either Canadian sites or make no distinction between Canadian and American websites. Only a few are not concerned about the location of sites whatsoever or prefer offshore sites. Site preferences, as indicated in Figure 13-4, do not vary much among demographic groups, except for retired consumers, who are the most concerned about security and more inclined than the other groups to prefer Canadian sites.

Figure 13-4 Preferred country of origin for Internet shopping sites



CIP 2007 — C2.214 (Internet user respondents who have purchased online, 18 years +, n=779)

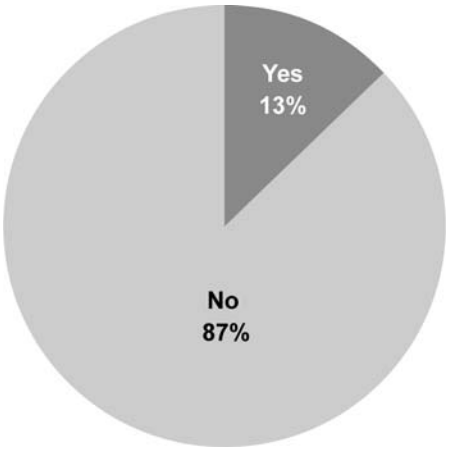
13.5 Downloading

Purchasing content on the Internet by paying for access to a website or to download or stream content is not yet a major part of the online marketplace. As Figure 13-5 indicates, a little over one in ten Internet users paid to get content in the six months prior to the survey (13%).

Yet, nearly half of all users (47%) had downloaded content from the Internet free-of-charge that they would have had to pay for on other sites,[19] indicating that demand for online content is quite strong. In fact, as Figure 13-6 presents, almost three in five users (28%) report engaging in downloading free content either sometimes or often.

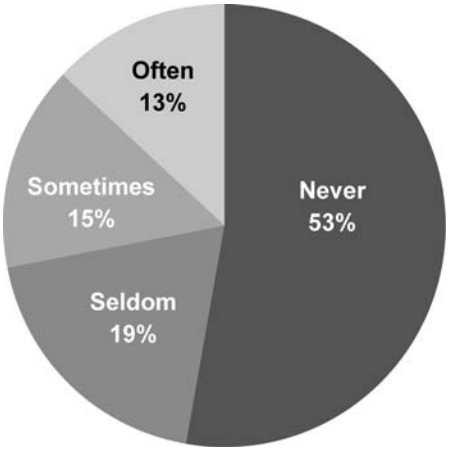
[19] The question (C2.169) was as follows: "How often do you download content from the Web for free, when you know that there are sites that would charge a fee for the same download?"

Figure 13-5 **Paid to download content in the period six months prior to the survey**



CIP 2007 — C2.167 (Internet user respondents, 12 years +, n=2369)

Figure 13-6 **Frequency of downloading free content from the Internet**



CIP 2007 — C2.169 (Internet user respondents, 12 years +, n=2355)

The most common source for downloading is television or broadcaster websites (see Table 13-4). This, for the most part, is currently considered a legal form of downloading, supported by advertising and encouraged by broadcasters seeking to reach online audiences. This is also true of downloading from cable or satellite websites, though some of this may be “grey market” downloading, not strictly legal under current licensing arrangements.

Downloading from file-sharing services is more likely to involve avoiding payment for music and other content under copyright. More than one in five Internet users have downloaded content from a file-sharing service and 7% do so often. File sharing is most heavily used by young adults (aged 18–29), males and those with high-speed broadband. More than one in four Internet users have downloaded or streamed something from a television website.

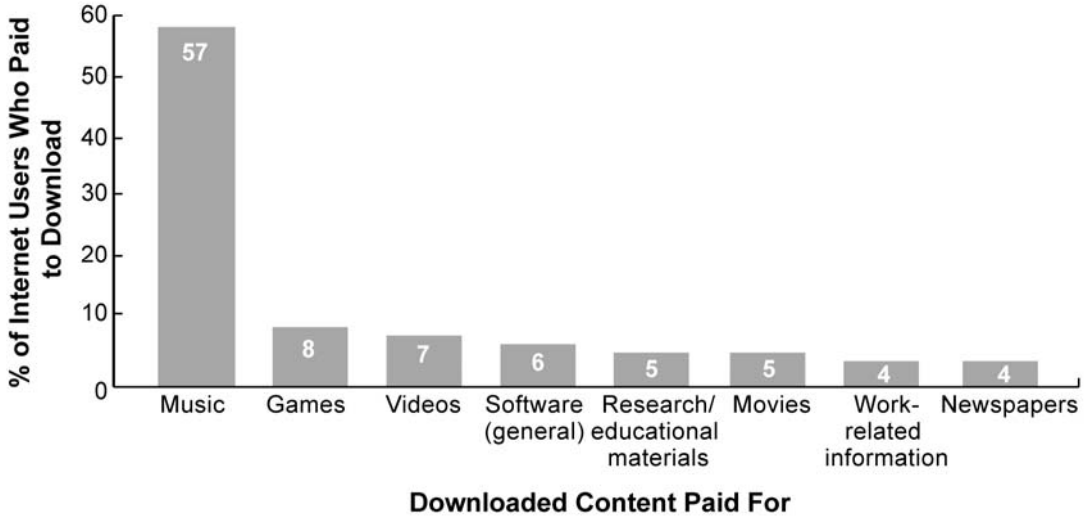
Table 13-4 Sources used to download paid or free content from the Internet

Source of Downloading	Percentage of Internet Users			
	Overall adoption level	Seldom	Sometimes	Often
	%	%	%	%
From a television/broadcast website	26	14	8	4
From a cable/satellite distributor website	17	10	5	2
From a file-sharing service	23	9	7	7

CIP 2007 — C2.170–172 (Internet user respondents, 12 years +, n=2371)

As Figure 13-7 illustrates, among those who paid for their online content, the overwhelming favourite purchase was music. No other product was mentioned by more than 10% of this group. Those who download content free-of-charge also favoured music.

Figure 13-7 Most popular content purchased for downloading or streaming online



CIP 2007 — C2.168m1–o3 (Internet users respondents who have paid for downloading, 12 years +, n=284)

More frequent and more experienced Internet users are the most likely to access or download paid content. About one in five has used a file-sharing service, but fewer than one in ten use it often. Young adults (18–29) are the heaviest users of file sharing, except when it comes to downloading music. Nearly three-quarters of the youth sample (12–17) have purchased music online, a little higher than slightly older users. There is not a statistically significant difference in downloading from a file-sharing service between males and females.

One in four of users active in social networks has paid to download content, about twice the average of all users. These users are also more likely to download free content, as are users who regularly surf the Internet.

Of all Internet users 23% report having downloaded content from a file-sharing service such as BitTorrent or Kazaa, though the actual percentage having done so may be greater given that some respondents may not have been inclined to admit this during the interview. Of those asked, 7% responded they did such downloading often. Table 13-5 provides patterns of file-sharing downloading across age categories. Young adults (18–29) are the most prolific when it comes to file-sharing activities.

Table 13-5 Frequency of downloading from a file-sharing service across age subgroups

Age Category	Percentage of Internet Users Who Download From a File-sharing Service (i.e., BitTorrent/Kazaa)			
	Overall adoption level	Often	Sometimes	Seldom
	%	%	%	%
12–17	27	7	9	11
18–29	43	19	13	12
30–44	25	6	7	12
45–59	12	3	4	6
60+	5	1	-1	5

CIP 2007 — C2.172 (Internet user respondents, 12 years +, n=2371)

Profile of users of file-sharing services:

- Predominantly young adults (aged 18–29)
- Mostly Internet users with broadband access
- Heavy Internet users
- Mostly males
- Primarily students

13.6 Advertising Online

As content producers seek to monetize online services, the advertising option looms larger. And, in fact, as Table 13-6 indicates, less than one-third of Canadian Internet users are “not at all comfortable” with online advertising. Nearly 70% find online advertising acceptable and a little over one in three are very comfortable with it.

Less engaged users and women tend to be uncomfortable with online advertising. However, the biggest differences in attitudes towards online advertising are age related. Internet users under 45 years of age are quite comfortable with online advertising. Their general preference for free access suggests that this group regards advertising as more acceptable than fee-based services. This preference is also strongly held by students, and those most active in surfing the Internet and participating in social networking.

Table 13-6 Level of comfort with online advertising across age subgroups

Age Category	Percentage of Internet Users' Comfort Level with Advertising Online		
	Comfortable	Somewhat comfortable	Not at all comfortable
	%	%	%
All Internet users	34	36	30
Age			
12–17	44	42	14
18–29	44	38	18
30–44	33	40	28
45–59	25	35	39
60+	27	24	49

CIP 2007 — C2.173 (Internet user respondents, 12 years +, n=2259)

13.7 Factors that Influence E-commerce

The most important determinants of participation in e-commerce are comfort with the Internet, including experience online, frequency of use and general comfort with new technology. In all age and life stage groups, Internet users who are comfortable with new technologies are the most active online consumers. Those who use social networks and surf the Internet most frequently are most likely to be active in the online marketplace as well.

For many e-commerce activities, men and English-speaking Canadians are the most active participants. One exception pertains to making retirement savings plan (RSP) contributions, wherein French-speaking Canadians are much more involved in those transactions online than are English-speaking Canadians.

With respect to life stage, employed Internet users aged 25–44 make more use of most services than do others. Retirees are least active but many do participate. Significant differences exist across income categories. Most often, households with an income over $80,000 are very active and those with an income under $40,000 are less so. British Columbia residents are generally more receptive to e-commerce than are residents of other provinces. They are the most frequent users of six of the eight online commerce activities asked about in the survey.

Profile of those most likely to engage in e-commerce:

- Heavy and experienced users
- Users who most engage with social networks online
- Those with broadband access
- Men
- Users aged 25–34
- Residents of British Columbia

Among those who choose to bypass the online market for cultural content (music, videos and so on), those who spend a lot of time online are the most likely to download free content. New and light users are less likely to do so. Income and education are not major factors, but gender is. Males, especially those under 25 years of age, are much more likely than females to get free music and other content.

13.8 Trends: 2004 to 2007

Overall, as Figure 13-8 indicates, it appears that the proportion of Canadian Internet users who engage in e-commerce transactions has remained stable since 2004.

Figure 13-8 Consumer behaviour on the Internet: 2004 to 2007

CIP 2004 — C1.128 (n=2152); CIP 2007 — C2.203 (Internet user respondents, 18 years +, n=2095)

However, there is measurable increase in the amount and frequency of purchasing and, it appears, the range of goods and services being accessed (see Table 13-7). Visits to auction sites, such as e-Bay, are up substantially.

Table 13-7 Products and services purchased online: 2004 to 2007

Products and Services Purchased Online	Percentage of Adult Internet Users Who Purchase Online		
	2004	2007	+ / -
	%	%	
Books	25	38	+13
Stocks/bonds	—	23	—
Clothes	8	19	+11
Music (all forms)	5	15	+10
Travel bookings	8	15	+7
Electronics	5	14	+9
Computer software	5	9	+4
DVDs/videos	3	9	+6
Computers and peripherals	6	7	+1

CIP 2004 — C1.130, 132 (n=1112); CIP 2007 — C2.211m1–o2 (Internet user respondents who have purchased online, 18 years +, n=756)

In addition, as Figure 13-9 shows, online shopping is making greater inroads into purchases at local retail stores, though it is not yet the cause of a major decline for local retailers.

Figure 13-9 Effect of Internet shopping on local store purchases: 2004 to 2007

CIP 2004 — C1.132 (n=1130); CIP 2007 — C2.213 (Adult Internet user respondents who have purchased online, 18 years +, n=783)

Table 13-8 shows that there is no significant shift in the general preference for Canadian- and US-based vendors. Preference for Canadian sources for online purchases remains quite high.

Table 13-8 Preferred country of origin for Internet shopping sites: 2004 to 2007

Internet sites preferred for online shopping	Percentage of Adult Internet Users	
	2004	2007
	%	%
Canadian websites	55	59
US websites	4	3
Canadian and US websites equally	34	30
Other foreign websites	2	1
Do not care	5	7

CIP 2004 — C1.129 (n=1126); CIP 2007 — C2.214 (Internet user respondents who have purchased online, 18 years +, n=779

While concern about the security of bank and credit card information remains high, it has declined somewhat since 2004. Nevertheless, the findings in Table 13-9 reflect concerns that online vendors should continue to monitor and address.

Table 13-9 Concern about financial security online: 2004 to 2007

Level of Concern about Financial Information Online	Percentage of All Respondents		Percentage of Internet Users	
	2004	2007	2004	2007
	%	%	%	%
Not at all/not very concerned	9	9	9	8
Somewhat concerned	19	30	30	34
Very concerned	29	26	30	26
Extremely concerned	43	32	37	30
No credit card	—	3	—	2

CIP 2004 — C1.041 (n=2979/2159); CIP 2007 — C2.070 (All/Internet user respondents, 18 years +, n=2710/2091)

While the 2004 study did not include direct measures of file sharing and other forms of downloading, related data, such as the proportion paying fees for online services, indicate that, with the exception of ISP fees, few Canadians paid for online services in 2004. The increase in downloading audio and video content discussed in Chapter 12 indicates that the market is growing for such services. The issue remains finding revenue streams to support them.

13.9 Conclusions

On the basis of this analysis, it can be concluded that the volume of online commerce continues to grow even while the percentage of Internet users in the customer base remains relatively stable. An increasing number of consumers are reporting a shift from retail stores to online purchasing and the proportion of Internet users visiting auction sites is up.

The major impediments to increasing the customer base appear to be concerns about security of financial information, lack of trust in vendors, especially among older users, and, for online content, the availability of free sites. However, the finding that many Internet users seem willing to accept advertising as an alternative to fee-based services is important. This is particularly relevant to content producers and distributors.

14 International Comparisons[20]

14.1 Key Findings

- Canada remains among world leaders in Internet penetration, experience online and broadband access
- Canada is average among countries participating in the World Internet Project (WIP) study in the continued use of slow-speed, dial-up connections (16%)
- Except for gender, digital divides — age, education and income — remain important in Canada and elsewhere
- Older and lower income Canadians — though much less likely to be online than are younger and wealthier Canadians — are much more likely to be online than are their counterparts in many other countries
- With nearly 50% of those over 60 years of age online, Canada ranks first among WIP countries in Internet access for the elderly
- Canadians spend more time online at work than do those in many other countries
- Canadians are more sceptical about the reliability of information online than are residents of other countries and are below average among WIP countries in regarding the Internet as an important source of information
- Canadian Internet users rank above average among users in WIP countries regarding attitudes toward the Internet as an important source of entertainment
- Compared to inhabitants in other countries surveyed by WIP, Canadians spend an average amount of time with both online and offline media
- Canadians are relatively heavy consumers of news online and are relatively frequent users of e-mail and IM compared to other countries
- Canadians are fairly frequent browsers online and multi-task more often while online than many other WIP countries
- Canadians are more likely than Internet users in other countries to report their time online has reduced time spent with family and, to a lesser extent, friends
- Canadians are not frequent bloggers compared to Internet users in other countries
- Canadians are quite active in the online marketplace, but are no longer among the leaders as they were in 2004, except in online banking
- Canadians are more likely to express concern about the financial security of online purchasing than are consumers in most other countries

14.2 Introduction

The global importance of the Internet makes it imperative to examine Canada's involvement with the Internet in an international context. These comparisons help to reveal how use of the Internet has spread and been adopted in various regions and countries. The diffusion process has been influenced not only by such factors as level of economic development and infrastructure but also by regulatory processes, market factors and culture. This chapter places developments in Canada in an international context by drawing on some common variables developed for use by the partners in the World Internet Project (WIP).

The WIP is an international consortium of researchers in 28 countries that undertakes collaborative research on the social, political and economic impact of the Internet, traditional media and other new digital technologies. By gathering longitudinal data on the way people use

[20] We are grateful to our colleagues in the World Internet Project (WIP) for making these comparative data available. We are especially grateful to those at the Social Science Data Bank at the Social Research Centre TARKI, Hungary, and the Centre for the Digital Future, USC Annenberg School for Communication, for their work on the WIP Common Database.

and think about the Internet and the effects it has on their lives, WIP enables its members to monitor trends in Internet use and digital development locally and in international context. The partners conduct representative national surveys on a regular basis, including 30 common questions in their questionnaires, the results of which are available to all members for international comparisons.

To provide the most useful comparisons, this study has focused on WIP countries that conducted surveys in 2007. The most important countries are those that are culturally and economically similar to Canada: Australia, Great Britain, New Zealand, Sweden and the US. However, the opportunity to examine Internet diffusion and development in the context of innovators like Singapore and rapidly developing countries like China, Hungary and the Czech Republic is also important.

While these data were collected using varying survey techniques, the questions asked were essentially the same and the results are broadly comparable.[21] In general, the rankings are reliable but more specific comparisons should be viewed with caution.

In order to make comparisons among the WIP countries as systematic as possible, the CIP youth sample (12–17 age group) has been omitted from the analysis. Several of the WIP surveys in other countries interviewed only adults (18 years and older). In a few cases, countries are omitted from the comparative analysis because the relevant question was not asked in that country or the data were not comparable.

14.3 Internet Penetration

Canada ranks very high in Internet penetration and experience online. Canadians were early Internet adopters and most Canadians have access to the Internet. On average, Canadians who are online have been using the Internet for more than nine years. The pattern of diffusion for the various countries indicates that earlier adoption of the Internet means a higher level of Internet use today. In all countries, it appears that experienced Internet users engage in a wider range of activities online than do newer users.

Table 14-1 Internet use and experience online: International comparisons

Country	Adult Internet Users		
	n	Internet users	Experience online
		%	Years
New Zealand	*1322*	77	7.9
Canada	***2666***	**77**	**9.2**
Sweden	*2015*	76	8.1
Australia	*984*	73	8.0
United States	*1800*	72	9.6
Israel	*421*	67	6.5
United Kingdom	*2336*	66	5.3

[21] For more information regarding survey methodologies employed in WIP countries, pleas consult Appendix D.

Country	Adult Internet Users		
	n	Internet users	Experience online
		%	Years
China — Urban	*1898*	66	6.3
Singapore	*724*	61	6.7
Macao	*1614*	59	5.8
Czech Republic	*1408*	50	5.1
Hungary	*2882*	42	4.7
Colombia	*2056*	15	3.5

CIP 2007 — C2.071–072 / WIP 2007 data (All respondents, 18 years +)

The most common reason for not being online is lack of interest. It is the most frequent response in six of the 11 countries for which data is available. The second most commonly cited set of reasons is not having a computer or Internet connection, or being concerned about the cost. All of these are interpreted as economic reasons, even though less than 10% of non-users cite cost specifically. Only in the Czech Republic do more than 10% mention cost directly as a reason for not being online. In Canada, 26% mention lack of a computer or connection and only 8% mention cost. However, it is reasonable to assume that choosing not to have a computer or Internet connection may be in part an economic decision.

Confusion about or lack of skill with the technology was not mentioned by very many Canadians as a reason for not being online (12% of adults). Only two countries had a lower percentage. The most common reasons for not being online are set out in Table 14-2.

Table 14-2 Reasons for not using the Internet: International comparisons

Country	Percentage of Adult Internet Non-users			
	n	No interest/not useful/too busy	Confused by technology	No computer/ too expensive
		%	%	%
Australia	*267*	37	20	25
Canada	***626***	**41**	**12**	**34**
China — Urban	*544*	64	22	8
Czech Republic	*687*	23	20	56
Hungary	*1673*	55	11	27
Israel	*123*	51	10	20
New Zealand	*222*	54	19	22
Singapore	*223*	36	44	20
Sweden	*476*	39	8	42
United States	*298*	25	13	45

CIP 2007 — C2.231 / WIP 2007 data (Internet non-user respondents, 18 years +)

Because of Canada's high level of Internet use, as Table 14-3 indicates, the proportion of the Canadian population with broadband access is among the highest in the world — an important factor in the viability of future broadband-dependent Internet applications. However, Canada also has a fairly high percentage of Internet users still connecting through dial-up modems, so there is considerable room for growth in broadband access. In some countries, almost everyone online has broadband, though a smaller percentage of citizens than in Canada are current Internet users.

Table 14-3 Broadband access across subgroups: International comparisons

Country	Percentage of Adult Respondents/Internet Users	
	Broadband connection	Broadband connection
	% (of Internet users)	% (of total population)
Australia	76	49
Canada	**80**	**58**
China — Urban	65	32
Colombia	55	6
Czech Republic	70	30
Hungary	87	31
Israel	94	57
Macao	97	49
New Zealand	65	42
Singapore	78	44
Sweden	85	66
United Kingdom	67	42
United States	71	46

CIP 2007 — C2.074 / WIP 2007 data (All/Internet user respondents, 18 years +)

14.4 Digital Divides

In this section, gender, age, education and income are examined as contributing to potential digital divides. Digital divides resulting from differences across various geo-demographic categories have long been a matter of concern for researchers and policy makers. These variations in Internet access remain important, not only because they raise issues of equity, but also because they place limits on the potential of the Internet to deliver innovative services, such as education, health services and e-government to remote or difficult-to-serve populations. They may also hinder the development of online markets for cultural and material content and services.

14.4.1 Gender

In terms of access to the Internet, gender is no longer a major influential factor in Canada or many of the other countries in the WIP study. The gap is statistically significant in only five countries. As Table 14-4 illustrates, Canada has the highest proportion of males online and the third highest percentage of females. In many countries, including Canada, males are still more likely to use many online applications.

Table 14-4 Internet use by gender: International comparisons

Country	Percentage of All Adult Respondents Across Gender Categories	
	Males online	Females online
	%	%
Australia	74	71
Canada	**79**	**75**
China — Urban*	73	56
Czech Republic*	55	46
Hungary*	45	39
Israel	71	64
Macao*	64	54
New Zealand	78	77
Singapore*	69	54
Sweden	75	78
United Kingdom	68	65
United States	71	73

CIP 2007 — C2.071, 262 / WIP 2007 data (All respondents, 18 years +)

14.4.2 Education

As Table 14-5 demonstrates, education remains a significant barrier to Internet access in all of the countries participating in the WIP study. Canada has among the highest percentages of Internet users post-high school. Among those over 18 years of age, not finishing high school has a strong negative relationship to Internet use. In the eight countries that did include youth respondents in their surveys, the overwhelming majority of youth are online. Even in the youngest age group, 12–14 years of age, more than nine in ten are online in six countries and more than 75% in the other two. The proportion of Canadian youth that are online is 95%. These data make it clear that the education divide will diminish significantly over time.

14.4.3 Age

Age remains a major factor driving Internet use. In Canada, virtually all of those under 45 are online. The fact that half of those over 60 are current Internet users in Canada underlines its high penetration level. These patterns are similar in countries that adopted the Internet early and have high per capita income. Age is more of a barrier in countries not as far advanced on the diffusion curve, as shown in Table 14-6. Many of the more affluent countries, including Canada, have programs to help senior citizens access the Internet.

Table 14-5 Internet use by education: International comparisons

Country	Percentage of All Adult Respondents Across Education Level				
	Primary school or lower	Attended high school	High/vocational school graduate	Attended/ attending university	College/ university graduate +
	%	%	%	%	%
Australia	17	49	70	90	90
Canada	**19**	**43**	**75**	**84**	**90**
China — Urban	17	33	41	87	82
Czech Republic	16	40	66	96	75
Hungary	7	—	—	95	81
Israel	27	27	67	68	83
Macao	12	39	70	98	97
New Zealand	14	60	66	90	90
Singapore	16	41	75	78	84
Sweden	43	78	82	91	—
United Kingdom	24	87	62	97	89
United States	44	27	60	79	89

CIP 2007 — C2.071, 263 / WIP 2007 data (All respondents, 18 years +)

Table 14-6 Internet use by age group: International comparisons

Country	Percentage of Internet Users Across Age Categories			
	18–29	30–44	45–59	60+
	%	%	%	%
Australia	94	88	73	39
Canada	**90**	**88**	**78**	**50**
China — Urban	86	63	36	—
Czech Republic	81	62	45	14
Israel	80	76	65	44
Macao	94	71	35	10
New Zealand	91	87	81	47
Singapore	74	72	41	15
Sweden	90	87	84	49
United Kingdom	82	78	73	36
United States	92	80	71	49

CIP 2007 — C2.071, 261a / WIP 2007 data (All respondents, 18 years +)

14.4.4 Income

Household income remains a significant barrier to Internet use. In all countries, those in higher income categories are significantly more likely to have access to the Internet than are those in lower income groups. The study has controlled for currency differences by dividing the sample into quintiles on the basis of household income. However, because of the nature of the data, the quintiles are not equal and provide only a rough approximation of household income distribution in each country.[22] The results are not strictly comparable but provide a good indication of overall levels of inequality in access to the Internet**.**

As Table 14-7 reveals, Canada has relatively high participation rates at all income levels. As in 2004, there is a high rate of participation even in the lowest income group. This holds true even when students are omitted from the calculation.

Table 14-7 Internet use by income: International comparisons

Country	Percentage of All Adult Respondents Across Household Income Level (Quintiles)				
	First quintile (lowest)	Second quintile	Third quintile	Fourth quintile	Fifth quintile (highest)
	%	%	%	%	%
Australia	55	73	85	86	93
Canada (quartiles)	**60**	**76**	**—**	**86**	**93**
China — Urban	32	48	71	75	82
Czech Republic	18	36	46	68	83
Hungary	52	18	20	37	61
Israel	43	51	69	78	84
Macao	47	53	71	75	82
New Zealand	52	67	82	89	92
Singapore	39	67	64	85	70
Sweden	59	74	87	89	93
United Kingdom	39	64	82	88	91
United States (quartiles)	57	75	—	87	88

CIP 2007 — C2.071, 261Ta / WIP 2007 data (All respondents, 18 years +)

Note:
- Because participating countries reported household income in different formats, the quintiles (quartiles for Canada and the United States) are only rough approximations of household income distributions in each country.

14.5 Time Spent Online at Various Locations

Table 14-8 provides a comparison of time spent online at home and work across participating WIP countries. Specifically in this analysis, a breakdown is presented of the number of hours in an average week spent using the Internet at home and at work from a wired PC only. Though there

[22] For the WIP study, Canada and the US use quartiles instead of quintiles for income comparisons.

are several other time measurement modalities across distinct locations and employing various access devices (wired and mobile), time spent online at home and at work on a wired PC was chosen as the most reliable measure for making comparisons across participating countries.

As previously discussed in Chapter 3 of this report, there exists some uncertainty surrounding time estimates, given the diversity of methodologies employed to obtain results and the reliability of self-reporting by survey respondents. Therefore, the comparative data provided here from participating WIP countries should be treated with caution. The data are most relevant and significant as a relative barometer of engagement rather than an exact measure of time spent online.

As the reader may note, there are also slight variations in the Canadian data reported previously in this report and that provided here in relative comparison to other countries. These variations are due to differences in the treatment of data in cross-national comparisons (e.g., outlier treatment, inclusion of zero time use, delineation of sub-sample group, and so on). However, it is still informative to compare time measures in relative terms. To be consistent with international comparisons, the WIP data corrections have been used in this instance.

As such, it can be said that, compared to inhabitants from other countries, Canadians spend a moderately high amount of time online at home and at work. The level of engagement measured in time online resembles the findings reported for overall adoption levels: Canadians reveal themselves as high-level engagers of the Internet in both cases compared to other WIP countries. Overall, Canada ranks third among the WIP countries in average time spent online at work in a typical week using a wired computer. As Chapter 3 reveals, time use is much greater for Canadians when wireless devices used to access the Internet are included in the overall time measures. All of these results support the conclusion that the Internet has become integrated into the everyday lives of a majority of Canadian Internet users.

Table 14-8 Time spent using the Internet from a wired PC: International comparisons

Country	Time Spent Online at Selected Locations Using a Wired PC Only	
	Home	Work
	hours/week	hours/week
Australia	8.8	6.9
Canada	**8.2**	**7.3**
China — Urban	2.3	3.0
Colombia	4.4	5.8
Czech Republic	7.5	6.1
Hungary	6.5	4.0
Israel	8.3	5.6
Macao	11.2	5.2
New Zealand	8.0	5.9
Singapore	15.2	21.9

Sweden	8.8	6.9
United Kingdom	10.6	6.9
United States	9.9	7.7

CIP 2007 — C2.076BR, 077B / WIP 2007 data (Internet user respondents, 18 years +)

Note:

- Variance with Canadian data presented earlier in this report is a result of measuring access from a wired PC only and slight differences in data treatment to facilitate international comparisons. In addition, some countries did not distinguish type of access in access modalities.

14.6 Time Spent with Traditional Media

Table 14-9 provides a breakdown of time spent using selected common traditional mass media across participating WIP countries. For each of the media compared — television, radio and newspapers — Canada is in the low to middle range, relative to the comparator group, in time spent in an average week. While Canadians are near the bottom in time spent watching television and reading newspapers, they are relatively high in listening to radio (fourth). In all WIP countries, Internet users spend less time watching television than do non-users, but being online does not appear to have much effect on the use of other traditional media.

Table 14-9 Time spent using selected traditional media: International comparisons

Country	Time Spent Using Selected Traditional Media		
	Television	Radio	Newspaper
	hours/week	hours/week	hours/week
Australia	15.8	15.8	3.7
Canada	**10.9**	**9.2**	**3.0**
China — Urban	16.5	3.2	4.5
Colombia	17.7	17.0	3.5
Czech Republic	17.6	14.1	4.7
Hungary	15.1	12.6	3.0
Israel	12.3	8.6	3.9
Macao	16.8	0.5	0.7
New Zealand	14.1	14.1	3.7
Singapore	11.2	5.5	5.8
Sweden	13.2	4.0	13.4
United Kingdom	16.7	7.9	3.1
United States	15.6	8.8	2.3

CIP 2007 — C2.030SS–032SS / WIP 2007 data (All respondents, 18 years +)

14.7 Getting News Online

The proportion of Canadians who go online for news is relatively high, both as a percentage of the total populace (ranking fourth) and of Internet users (ranking seventh). Canadian adults rank close to the WIP average in terms of frequency with which they check the news online, and compared to other members of English-speaking WIP countries. What is perhaps most striking about the data in Table 14.10 is that, on average, 80% of users in this sample of countries look for news online and one in three do so daily. These percentages are based on a question that asked respondents how often they went online to "look for local, national or international news." This question implies both a fairly specific definition of news and an active search for it. These data make it clear that the Internet is an important source of news for most Internet users, including Canadians.

Table 14-10 Frequency of accessing news from the Internet: International comparisons

Country	Percentage of Adult Respondents and Internet Users Who Go Online for News		
	Adult respondents (ever use)	Internet users (ever use)	Internet users (daily use)
	%	%	%
Australia	45	76	31
Canada	**61**	**81**	**35**
China — Urban	50	77	46
Colombia	11	77	18
Czech Republic	46	88	45
Hungary	39	89	38
Israel	58	83	58
Macao	48	90	52
New Zealand	62	80	37
Singapore	44	73	35
Sweden	67	87	48
United Kingdom	46	69	18
United States	62	87	42

CIP 2007 — C2.123 / WIP 2007 data (All/Internet user respondents, 18 years +)

14.8 Reliability and Importance of Information on the Internet

A majority of Internet users in most of the countries surveyed believe that information found on the Internet should be viewed with caution. In only two countries do a majority believe that most or all of the information is reliable. Overall, Canadians fall into the middle group in having confidence in information on the Internet.

Nevertheless, Canadians regard the Internet as an important source of information. While more than two-thirds of Canadian Internet users take this view, this number is not high by international standards, probably reflecting continued confidence in traditional news media particularly among older Canadians.

Table 14-11 Perceived reliability of information on the Internet: International comparisons

Country	Adult Internet Users' Perception of Online Content Reliability		
	Most or all	Half	None or small amount
	%	%	%
Australia	40	43	17
Canada	**38**	**46**	**17**
China — Urban	31	54	16
Colombia	48	37	14
Czech Republic	54	38	7
Hungary	62	32	7
Israel	43	41	17
Macao	27	58	15
New Zealand	49	39	12
Singapore	40	45	16
Sweden	36	34	30
United Kingdom	55	33	13
United States	48	43	9

CIP 2007 — C2.067 / WIP 2007 data (Internet user respondents, 18 years +)

Note:
- Questions posed in surveys of Hungary and the United Kingdom asked about both reliability and accuracy of online information.

However, Canadian Internet users are more likely than the international average to regard the Internet as an important source of entertainment (Table 14-12). As noted above, this is a significant change from 2004 and indicates openness to new forms of online content production. International comparisons indicate an increasingly strong appetite for online entertainment in many countries.

Table 14-12 Perceived importance of the Internet as a source of information and entertainment: International comparisons

Country	Perception of Importance of Information and Entertainment from Online Sources			
	Adult Respondents		Adult Internet Users	
	Information	Entertainment	Information	Entertainment
	%	%	%	%
Australia	50	23	69	32
Canada	**54**	**44**	**66**	**53**
China — Urban	71	66	81	76
Colombia	13	11	86	72
Czech Republic	43	33	71	48
Hungary	35	25	72	50
Israel	57	45	68	52
Macao	51	31	67	41
New Zealand	61	41	71	49
Singapore	61	46	73	53
Sweden	46	33	55	41
United Kingdom	39	29	56	41
United States	60	45	71	58

CIP 2007 — C2.043, 050 / WIP 2007 data (All/Internet user respondents, 18 years +)

14.9 Online Applications and Activities

Communication-related Internet applications are still very popular. E-mail remains predominant. Most Internet users send or read e-mail at least daily. The nature of work in technologically advanced countries may be a major factor. IM is a popular application, especially among younger users. Canadians are very frequent users of e-mail and above average users of IM. Use of chat rooms is less popular in Canada than in many other countries. As Table 14-13 shows, communication-related applications remain important for Internet users.

Table 14-13 Frequency of use of online communication applications: International comparisons

Country	Percentage of Adult Internet Users					
	E-mail (ever use)	E-mail (daily use)	Instant messaging (ever use)	Instant messaging (daily use)	Chat (ever use)	Chat (daily use)
	%	%	%	%	%	%
Australia	96	75	41	21	12	3
Canada	**95**	**79**	**54**	**30**	**14**	**5**
China — Urban	81	29	79	52	34	7
Colombia	93	46	72	32	36	5
Czech Republic	97	70	69	35	50	12
Hungary	92	61	52	20	26	3
Israel	90	67	48	32	11	4
Macao	86	47	62	34	—	—
New Zealand	98	81	44	18	16	3
Singapore	96	75	59	38	32	16
Sweden	93	59	43	25	12	2
United Kingdom	93	68	60	30	29	6
United States	99	85	45	20	19	4

CIP 2007 — C2.086–088 / WIP 2007 data (Internet user respondents, 18 years +)

While, overall, Canadians are not leaders in using online entertainment services — just as they do not rank highest in time spent with offline media — a sizable proportion of users are consumers of these services. Although a fairly large percentage of Canadian Internet users listen to online radio, download and listen to music, and play games online, in comparative terms they are not frequent users of these online activities. This is also true of video downloading (data not shown), where the number of Canadians who have ever downloaded a video (36%) ranks ninth among the WIP countries. In the competition for attention in a media-rich country like Canada, online entertainment is not displacing offline activities. However, it is likely that online audiences will continue to grow, and online entertainment will carry on supplementing or may indeed begin to displace other activities.

Table 14-14 Frequency of use of selected entertainment activities: International comparisons

Country	Percentage of Adult Internet Users					
	Radio online (ever use)	Radio online (daily use)	Music online (ever use)	Music online (daily use)	Games online (ever use)	Games online (daily use)
	%	%	%	%	%	%
Australia	26	2	50	10	15	4
Canada	**39**	**7**	**53**	**12**	**37**	**12**
China — Urban	20	4	86	33	64	25
Colombia	27	3	66	10	31	4
Czech Republic	46	12	64	19	59	14
Hungary	28	6	62	12	50	10
Israel	36	15	56	27	38	12
Macao	—	—	56	9	32	9
New Zealand	26	3	49	9	31	7
Singapore	26	5	50	12	39	11
Sweden	39	5	45	8	32	4
United Kingdom	34	8	51	4	41	8
United States	39	5	57	10	50	18

CIP 2007 — C2.140–144 / WIP 2007 data (Internet user respondents, 18 years +)

Most Internet users in the countries surveyed have at least sometimes gone online not for a specific purpose, but simply to be there. Canadians are relatively likely to “browse” the Internet in this fashion, indicating they are open to experiencing the Internet as a place for generalized experiences as well as an instrument for communication and information. Canadians are also among the more frequent multi-taskers. As seen in Table 14-15, for many Internet users, especially in Canada, being online is increasingly viewed as a part of everyday life.

Table 14-15 Frequency of general browsing and multi-tasking while online: International comparisons

Country	Percentage of Adult Internet Users			
	Browse (ever use)	Browse (daily use)	Multi-task (sometimes)	Multi-task (most of the time)
	%	%	%	%
Australia	58	15	28	35
Canada	**88**	**47**	**39**	**35**
China — Urban	89	63	74	18
Colombia	71	19	41	28
Czech Republic	89	39	48	18
Hungary	88	49	34	28
Israel	90	61	28	47
Macao	80	38	25	39
New Zealand	94	53	36	28
Singapore	85	53	33	40
Sweden	77	18	50	25
United Kingdom	89	43	19	45
United States	88	45	52	27

CIP 2007 — C2.146, 177 / WIP 2007 data (Internet user respondents, 18 years +)

Canadians are not among the world's major weblog consumers or contributors, ranking in the middle of this group in percentage reading blogs and contributing to them (see Table 14-16). The countries in which weblogs are most popular appear to be those where other forms of public discourse are limited. Nevertheless, blogging and related forms of social networking and online self-expression are growing in Canada, as elsewhere, and Canadians are in step with international developments.

Table 14-16 Frequency of reading and writing weblogs: International comparisons

Country	Percentage of Adult Internet Users			
	Read a weblog (ever use)	Read a weblog (weekly use)	Write a weblog (ever use)	Write a weblog (weekly)
	%	%	%	%
Australia	26	12	8	3
Canada	**34**	**17**	**12**	**7**
China — Urban	60	37	26	15
Colombia	26	9	25	10
Czech Republic	51	20	25	15
Hungary	24	9	7	3
Israel	20	13	9	7
Macao	49	29	22	13
New Zealand	35	18	8	6
Singapore	32	19	17	12
Sweden	37	11	4	3
United Kingdom	—	—	13	5
United States	38	15	10	5

CIP 2007 — C2.126, 091 / WIP 2007 data (Internet user respondents, 18 years +)

14.10 Social Impact of the Internet

Across almost all WIP countries reporting, most Internet users do not perceive any change in the face-to-face time they spend with family and friends as a result of being online. However, as many as three in ten (in Canada, for example) believe that their time online has reduced their time with family. Very few Internet users believe being online has increased face-to-face time with family. The perceived impact on time with friends is much less. Indeed, in Columbia, more Internet users report an increase in time with friends than report a decrease, presumably a result of using online communications to arrange social events. Canadians are among the countries with the highest percentage believing that being online has reduced time with family and, to a lesser extent, friends. The findings throughout this report demonstrate that time spent online does not significantly displace use of conventional media. While multi-tasking has been shown to impact all media use levels, it appears that some of the additional time spent with online activities has come at the expense of social engagement with family members.

Table 14-17 Impact of Internet use on time spent with family and friends: International comparisons

Country	Percentage of Adult Internet Users			
	Less time with family	More time with family	Less time with friends	More time with friends
	%	%	%	%
Australia	31	3	13	7
Canada	**31**	**5**	**16**	**7**
China — Urban	15	2	18	5
Colombia	17	7	16	22
Czech Republic	31	2	15	4
Hungary	18	3	10	6
Israel	29	4	14	7
New Zealand	23	4	10	7
Sweden	24	2	6	3
United Kingdom	6	2	7	1
United States	32	0	17	3

CIP 2007 — C2.228–229 / WIP 2007 data (Internet user respondents, 18 years +)

14.11 Online Commerce

Canadians are quite active in online commerce but a number of other countries have moved ahead of Canada in the percentage of Internet users conducting e-commerce activities online (see Table 14-18). The exception is banking online, where Canada is ranked among the top countries. This is consistent with early adoption of debit cards and other banking innovations in Canada. The proportion of Canadians shopping online has remained roughly stable since 2004 while the participation level in other countries has increased. However, Canadians who do shop online are relatively active, averaging approximately one purchase per month, sixth among the WIP countries who responded to this question.

Table 14-18 Consumer behaviour online: International comparisons

Country	Percentage of Adult Internet Users		
	Research product	Purchase online	Bank online
	%	%	%
Australia	83	57	68
Canada	**76**	**49**	**64**
China — Urban	58	37	33
Colombia	50	8	23
Czech Republic	87	56	45
Hungary	85	23	20
Israel	72	44	43
Macao	—	20	33
New Zealand	83	63	71
Singapore	65	34	42
Sweden	86	75	80
United Kingdom	90	79	55
United States	94	88	69

CIP 2007 — C2.204, 205, 208 / WIP 2007 data (Internet user respondents, 18 years +)

As Table 14-19 reveals, Canadians are more likely than average in the WIP survey group to express concern about the security of their financial information on the Internet. Nevertheless, there is a substantial online market in Canada, with room for growth.

Table 14-19 Concern about the security of financial information on the Internet: International comparisons

Country	Percentage of Adult Internet Users			
	Not at all concerned	Somewhat concerned	Very/extremely concerned	No credit card
	%	%	%	%
Australia	14	33	51	2
Canada	**8**	**34**	**56**	**2**
China — Urban	26	46	25	3
Colombia	17	13	41	29
Czech Republic	13	32	37	18
Hungary	15	24	54	7
Israel	30	29	42	0
Macao	17	30	39	12
New Zealand	10	39	45	6
Singapore	19	28	53	0
Sweden	20	27	53	1
United States	5	45	49	1

CIP 2007 — C2.070 / WIP 2007 data (Internet user respondents, 18 years +)

14.12 Trends: 2004 to 2007

The WIP Common Database first became available in 2008, based on surveys conducted in 2007. The comparisons reported in CIP 2004 were compiled from individual country studies, not all of which fielded a national survey in 2007 or asked completely comparable questions. Therefore, it is not yet possible to make longitudinal comparisons for all questions. Nevertheless, general observations can be made about trends by comparing the current findings of this study with those from the previous report, *Canada Online! 2004*, in which systematic international comparisons were made with a number of similar countries.

As noted above, Canada remains near the top of the WIP countries in Internet penetration and experience online. However, since 2004 the gap in percentage currently online has been closing. Seven countries now report that more than 70% of their citizens are online. Of course, as early adopters of the Internet, Canadians continue, along with Americans, to have the most Internet users with more than ten years' experience online. Not surprisingly, growth in Internet use in the countries that were early adopters has slowed relative to other countries, as the market nears the saturation point or new classifications of Internet users emerge (e.g., intermittent users, as discussed in Chapter 4).

In terms of digital divides, the gap between the percentage of men and women online continues to decrease in Canada (from 6% in 2004 to 4% in 2007). In this respect, Canada is similar to other WIP countries. It should be noted that the gap is now so small as to be within the statistical margin of error.

There continues to be a significant education gap in all the countries in the 2007 WIP sample. Canada remains in the top five in Internet use rate for each education level, as it was in 2004. The lowest Internet penetration level in Canada is found in the relatively small group of adults who did not complete primary school.

In terms of age, Canada's Internet penetration levels were in the top three for all age groups in 2004 and this continues for most groups. With nearly 50% of those over 60 years of age online, Canadian ranks first among WIP countries in Internet access for seniors.

With respect to information and entertainment, the perceived importance of the Internet has declined in comparative terms. Canada is now tenth compared to WIP countries in terms of the number of Internet users who regard the Internet as an important source of information, down from fourth in 2004. This drop in ranking is a result of a slight percentage decline on this measure in Canada and a slight increase in other countries. Canadians remain among the more sceptical countries of Internet users regarding the reliability of information online. In all countries, heavy users of the Internet have more confidence in the information found there, perhaps because they have confidence in their preferred online sources.

With respect to the importance attributed to the Internet as a source of entertainment, Canadian Internet users are among the most positive. Canada ranks just about where it was in 2004, near the top, with more than half of online Canadians rating the Internet as an important source of entertainment. This is in contrast to the response of the overall population to entertainment online. It seems that Canadian non-users are less likely than those in other countries to think they would have more and better entertainment choices if they were online.

Canada continues to rank in the top five in e-mail and IM use. However, Canada ranked first in 2004 for both of those applications. Small fluctuations in rank are unlikely important as variance in penetration levels is slight.

In terms of online commerce, Canada's ranking as having the most active Internet shoppers in the WIP group of countries in 2004 was not sustained in 2007. In fact, the percentage of Canadians who purchase things online remained stable while that in other countries increased. Although still relatively high, Canada now ranks sixth in this regard.

14.13 Conclusions

Canada has a very high level of Internet penetration and Canadian Internet users are fairly frequent users of a wide range of online activities and applications. As a percentage of the population, Canada has a high level of broadband access. However, at about 16% of Internet users, slow-speed dial-up connectivity remains more important in Canada than in many WIP countries. There is no significant gender gap in access to the Internet in Canada (although, as has been seen, males are more frequent users of many online services than are females). However, there remain significant gaps across education, age and income categories. Canada is still among the leaders in Internet use among those over 60 years of age and among lower education and income groups, but other countries have been catching up.

Canadians spend considerable time online from home and are among the most frequent users at work. In addition, Canadians are relatively frequent users of e-mail, IM and chat, though the latter service does not engage a large percentage of users. Canadians tend to be around the average among surveyed nations in accessing news online, using online media and shopping online. Canadians are closest to the top in listening to radio online and banking online. Canada is near the international average in both multi-tasking while online and browsing online. For most of the variables examined, Canada is among the leading countries in percentage engaging in online

activities and services but it is not in as strong a position as it was in 2004, as Internet use in other countries proliferates and catches up with consumption levels in Canada

Perhaps the most obvious conclusions to be drawn from these comparisons are that growth in countries that were early adopters is slowing relative to other countries, and the rapid growth in Internet penetration and use around the world means that countries like Canada, with an early lead, must continue to grow and expand Internet access and broadband availability just to maintain their reputation as world leaders in the adoption of the Internet and emerging technologies.

15 Reflections

By any measure, Internet penetration in Canada is very high and likely to remain so. Once online, few Canadians abandon the Internet and only about one in ten is currently a hard core non-user who has never been online and never will be, a group that is mostly over 60 years of age. For Canadians under 30, Internet use is almost universal and, as this group grows older, the Internet will become even more pervasive than it is today.

The proliferation of new online activities over the past decade has been even more impressive than the high penetration rate. As this report demonstrates, the transformational aspects of the Internet are dramatic and affect many aspects of everyday life, from work patterns to new forms of creative expression and socializing. Yet, in the midst of the rapid adoption of new technologies and activities, interpersonal sources remain important for both information and entertainment, and traditional media continue to attract the attention of most Canadians.

Here we present ten overarching observations derived from our analysis. Our focus is on the nature of Internet engagement or life online. Analysis of more specific aspects of Internet use and online activities is presented in detail in our report.

The Internet has become an essential aspect of everyday life for most Canadians.

For most of us, the integration of the Internet into our daily lives has been seamless and, for many, transformative. It has become a principal conduit for information, entertainment, learning, social interaction and networking for Internet users from all walks of life. Its influence is inescapable. For heavy Internet users, now a substantial proportion of Canadians, the online world may well be more important than the moving images on television that transformed life in the last half of the previous century. For some, it has even become addictive.

Although Internet penetration is reaching saturation, frequency of use and time online will continue to increase substantially. For those who are online, most are online a lot. We expect the strong growth reported here to continue as broadband connectivity expands, new and attractive services are introduced and users of all ages become more comfortable with and aware of the vast range of activities available online. Indeed, many users are inventing their own online activities.

High-speed broadband has transformed the online world and continues to revolutionize Internet use.

While high-speed access has enabled many uses to expand, it is the “always-on” nature of broadband connectivity that has caused the most significant shift in perception and behaviour. A majority of Canadians — proportionally more than in most other countries — have access to high-speed broadband. While access to broadband does not affect use of the most basic Internet services, like e-mail, it has profound effects on time spent online and the range of services used, which in turn affects dependency on the Internet**.** Not only are broadband users much more likely than non-broadband users to engage in more technologically advanced online services, such as video downloading and sophisticated interaction and networking, they also use more applications and they use them more often. More generally stated, high-speed broadband has changed how we view the Internet and what we expect from it.

Internet users (and non-users) are not all alike.

Internet users vary substantially in their use of the Internet and, more importantly, how they relate to it. As suggested above, the Internet plays a much different role in the lives of light versus heavy users. In fact, light users (those who are online fewer than two hours per week) are quite similar in their Internet use patterns to respondents who defined themselves as non-users but in fact go online from time to time. This latter group, termed “casual engagers,” drop in and out of the online world, partly for reasons of access (but not cost), but mainly because they regard the Internet as a service to be used as needed. Like light users, casual engagers tend to go online primarily to seek information and communicate with others. The existence of this group is an important reminder that engagement with the Internet varies according to not only standard demographic variables but also perceptions of the value of the Internet.

Mobile and wireless Internet access is not yet a major portal to the online world for Canadians.

As part of the conquest of time and space, mobile Internet access has the potential to change the way many Canadians engage with the online world. In Canada, however, wireless devices are, for the most part, nominal extensions of the wired PC, and Internet access via cell phones and other wireless devices remains quite limited. Part of the encumbrance lies with age. Current penetration levels among younger Canadians will certainly increase mobile and wireless connectivity over time. However, it may also be that there are culturally specific causes for lack of uptake of wireless and mobile devices for Internet connectivity. Nevertheless, overall time spent online using wireless and mobile devices has almost doubled between the 2004 and 2007 CIP surveys, as mobile devices become more common and more convenient, particularly among younger Canadians. We expect a proliferation of new content and services designed for smaller screens over time.

The Internet is seen as a destination in itself.

The Internet began as a channel for specific purposes, primarily for communication and information seeking. Our findings suggest that more and more Canadians venture online primarily for engagement and interaction, using the Internet as a location to visit or an experience to undertake. Fact finding has been replaced with exploration and discovery of place — a virtual journey or adventure. The Internet has evolved into more than just another medium. It is as much a place and destination as anything else.

The most enthusiastic adherents to this new culture, primarily younger Internet users, spend significant amounts of their online time browsing without a specific goal or purpose, visiting and contributing to blogs or social networking sites more or less spontaneously, and sharing information and expression of both a personal and more formal nature. The majority of Canadian Internet users browse the Internet without a specific purpose in mind, most doing so regularly. Interestingly, screen sharing or browsing and/or virtually connecting online with others with someone physically alongside has become a common practice, particularly for youth. The Internet has evolved from a utilitarian tool and functional medium to a destination in itself — simply put, a place to visit, and a social forum within which to interact with others and to share. This growing aspect of online life is influencing a wider range of Internet activities and developments and, we believe, fundamentally changing social dynamics and relations.

Sampling behaviour is synonymous with online engagement.

Online "sampling" of content appears to be a widespread activity and is perhaps symptomatic of the changing patterns of consumption brought about by the Internet. The Internet offers unprecedented opportunities to search for and access content online, unlike any previous medium, and there is an abundance of choice. Its impact on consumption of cultural content is considerable, as the experience of using and sampling media rather than attending to specific content is increasingly becoming a part of the use patterns of Canadians online. The traditional approach to audience research focuses on consumption of specific cultural materials or media. It asks who watches or listens to what and when. But when Internet users go online, they are often listening to music and doing research, checking out a video while blogging in response to it or, perhaps, simply browsing or surfing online without a specific goal in mind. This new paradigm of online engagement may be seen as a novel form of mediated experience and raises questions about how to conceptualize cultural specificity in the context of online activities. The quest for new online experiences may not reflect established definitions of community or cultural identity.

The Internet is the leading venue for new forms of social interaction and engagement.

The emergence of social networks is transforming the online experience, as much as it is changing social connectivity and expression. Social and community networking sites encourage new forms of socializing and interacting with geographically dispersed friends, and groups created for common and diverse purposes. It also provides the opportunity for exchange of creative expression, such as sharing of photos and videos online. Being online has increased and supplemented contact with family and friends, but has also reduced time spent face-to-face with both, especially family.

More and more Canadians are looking for entertainment online.

While information seeking remains the most common reason for going online, there has been a significant increase across the two CIP surveys in accessing online entertainment activities as a motive for using the Internet. In fact, youth spend more time online for entertainment than for information, while young adult Internet users spend about equal time for each. As these cohorts age, we can expect the entertainment portion of online time to continue to grow relative to time devoted to seeking information.

The Internet is more of a supplement to than a replacement for traditional media.

Online activities appear more typically to supplement than to displace traditional media use. This flies in the face of conventional wisdom, which suggests Internet use has increased at the expense of traditional media. The amount of time spent attending to conventional media by Internet users and non-users is virtually identical. While some media consumption has significantly diminished — television viewing, for example — Internet users are not finding the time to be online by taking away from their traditional media diet. One of the most popular entertainment-related activities online is visiting television and network websites. For many, the Internet has become another conduit for traditional media in both original and repurposed form.

It appears that Internet time comes from a variety of other activities, including face-to-face time with family and friends, as part of an overall adjustment. In fact, Internet users tend to be heavier users of all media. Media use begets more media use. More and more Internet users are taking advantage of the wide range of choice — for consumption and interaction — that the Internet provides. While time spent using traditional media has declined since 2004, the decline is similar for Internet users and non-users and reflects a general increase in competition for audience attention.

Multi-tasking is an integral part of online behaviour.

Online engagement is not an isolated activity. It is part of a multi-faceted range of concurrent activities. Multi-tasking behaviour is very common while online. The majority of Canadians online tell us that they are listening to music, watching television or talking on the telephone at the same time they use the Internet. This provides valuable insights into emerging online behaviour as younger Canadians more readily embrace several activities simultaneously. It also informs us about the changing nature of consumption, particularly online consumption. Content development and activities online must take into account users' decreasing attention spans and changes in intensity or focus.

As well, the multifaceted nature of the Internet, along with the multitasking it encourages, means that Internet users cannot be seen simply as audiences or consumers of cultural goods or information services. A majority are also producers and distributors of various forms of cultural expression. In addition, many Internet users, especially those under 30 years of age, are participants in a complex and rapidly changing online world. The challenge is to find ways of measuring and describing this kind of engagement**.**

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Appendix C Principals, Research and Administrative Support

Charles Zamaria
Principal Investigator and Project Director

Since 1991, Charles Zamaria has been a full professor in the School of Radio and Television Arts and the Faculty of Graduate Studies at Ryerson University. His specialization includes the study of business aspects and production practices in program production, and policy studies for various media industries, with particular emphasis on the cultural sector.

Mr. Zamaria is an appointed Research Fellow at the Robarts Centre for Canadian Studies, York University. As a researcher, the current focus of his work is the examination of behaviour and attitudes related to adoption of the Internet and emerging technologies. Mr. Zamaria has been Principal Investigator and Project Director of the Canadian Internet Project since its inception in 2004. He co-authored CIP's inaugural, baseline report: *Canada Online! A Comparative Analysis of Internet Users and Non-users in Canada and the World* (2005).

Concurrently, Mr. Zamaria serves as Financial Director for the ***Bell Broadcast and New Media Fund*** — a leading funding organization supporting the development of convergent cross-platform digital content in Canada (Internet, wireless, mobile, games, interactive and broadcast television). Along with his day-to-day responsibilities, he has helped to create guidelines for best practices in the industry and national professional benchmarks for the emerging new media content production sector. Mr. Zamaria conceived and designed the new media budget template that has been adopted as Canada's national standard for the interactive production industry and used by organizations such as the Bell Fund, Telefilm Canada and the Ontario Media Development Corporation (OMDC).

Mr. Zamaria is also Financial Director for several other funding agencies, including the ***Independent Production Fund,*** the ***COGECO Program Development Fund*** and the ***Canwest Alberta Fund***. These private organizations provide grants, loans and equity investments for various genres of television programming and feature film production.

As a media practitioner for the past 30 years, Mr. Zamaria has worked for numerous broadcasting organizations and production companies, including CTV, YTV, Telefilm Canada, Cambium Productions (presently CCI) and Breakthrough Film and Television, in various senior management capacities. Further, he was an editor with the CBC for several years. He has a long list of credits as producer, line producer, production manager, accountant, sound recordist and editor on dozens of award-winning independent film and television productions. Selected productions include *Sharon, Lois and Bram's Elephant Show, The Last Winter, Big Comfy Couch, Dudley the Dragon, Groundling Marsh, Sweating Bullets, Einstein Tonight, Jane Siberry — One More Colour,* and *Luba — Between Earth and Sky.*

He is the author of a wide range of academic papers, professional reports, industry articles and book chapters. Selected titles include *New Media New Business: The Producer's Guide;* the Academy of Canadian Cinema and Television's publication, *Making It — The Business of Film and Television Production in Canada,* and the Bell Broadcast and New Media Fund's handbook, *Create a Winning Proposal — The Handbook for New Media Producers.*

Mr. Zamaria is much sought after internationally to present papers, keynote addresses and workshops at both academic and professional conferences and symposia around the world. He annually presents at the World Internet Project conference held each year in various countries

and Converge Eventos, Tela Viva in Brazil. Other selected countries where he has presented include India, Japan, Australia, Malaysia and Singapore. He is a frequent moderator and panellist at key Canadian conferences related to the new media industry, such as the Banff World Television Festival, nextMEDIA — The Future of Digital Content, the Interactive Content Exchange (ICE), and the Alliance for Children and Television (ACT), and has presented at other prestigious forums such as the Conference Board of Canada, Television Animation Conference (TAC) and the National Metropolis Conference (CERIS).

He has organized and led several international trade and cultural missions and summits on behalf of the Government of Canada (Department of Foreign Affairs and International Trade, Department of Canadian Heritage and the Canadian Radio-television and Telecommunications Commission (CRTC)). He regularly consults with and advises key federal and provincial government departments and agencies, as well as private organizations and industry associations. Mr. Zamaria is an active participant and consultant for several national committees related to Canadian content production and business practices including the National New Media Advisory Committee (Cultural Human Resources Council (CHRC) and Industry Canada), which is presently engaged in creating an official technology roadmap for the new media content production sector in Canada.

As a founding member of the *National Film and Television Professional Development Group* of the CHRC, he was responsible for developing and implementing several key conferences and working committees across Canada to support training in the film, television and interactive digital media industries. Mr. Zamaria now sits on the steering committee for the *CHRC.* Professionally, he is a member of *Association of Internet Researchers, Director's Guild of Canada, Canadian Film and Television Production Association (CFTPA), Documentary Organization of Canada, Academy of Canadian Cinema and Television, University Film and Video Association,* and *Broadcast Educators Association* (internationally and in Canada). He is also a member of the *Federal/Interprovincial Tax Credit Committee* and *Trade Team Canada — Cultural Goods and Services (TTC-CGS).*

He received his MA in Communications Studies from the University of Windsor, BFA Honours in Fine Arts from York University, and International Baccalaureate degree from Lester B. Pearson College of the Pacific (United World Colleges). Mr. Zamaria is a PhD candidate in Communication and Culture at York University, currently engaged in final preparation of his doctoral thesis.

Fred Fletcher
Co-Investigator

Dr. Fred Fletcher (PhD, Duke) is Professor Emeritus, Communication Studies and Political Science and holds the honorific title of University Professor at York University. He was founding Director of the Joint Graduate Program in Communication and Culture (a partnership of York University and Ryerson University), 1998–2006.

He is Past Chair of the Canadian Media Research Consortium (CMRC), co-investigator on the Canadian Internet Project and co-author of *Canada Online! A Comparative Analysis of Internet Users and Non-users in Canada and the World* (2005). He has also been a co-investigator on several other CMRC projects, including Examining Credibility in Canadian Journalism / Report Card the Canadian News Media, The Credibility Gap: Canadians and Their News Media, Fairness in News Media and Online Canadians and News.

As a researcher, Dr. Fletcher has worked for three Royal Commissions, the most recent being the Royal Commission on Electoral Reform and Party Financing, for which he served as Research Coordinator, Media and Elections. As author and editor, he has published seven books and more than 100 book chapters, technical papers, and journal articles, most on media-related issues. Among his publications are pioneering studies of the Ontario Legislative Press Gallery, the Ottawa Press Gallery, news coverage of election campaigns in Canada, election campaign advertising, communication policy and regulatory issues. He has also presented many conference papers and given keynote addresses at the annual conferences of the Canadian Communication Association, of which he is a former President, and the International Communication Association. He has served on the editorial boards of the *Canadian Journal of Political Science,* the *Canadian Journal of Communication,* and the international journal, *Political Communication,* and on the board of directors of the Canadian Political Science Association. For more than a decade, Dr. Fletcher was a member of the Advisory Council of the Graduate School of Journalism at the University of Western Ontario.

Dr. Fletcher's major publications have been on the media and politics and on communication and democracy (especially electoral communication). He has also published several recent studies on the effect of the Internet on the news media and its role in democratic societies.

In addition to working as a consultant for a number of leading media organizations and Elections Canada, he has been an expert witness on election campaign and media issues in several recent constitutional cases. Dr. Fletcher has also been Principal Investigator for a number of major research programs, including the Ontario Election Study and the Election Broadcasting Project.

Before joining York University, Dr. Fletcher taught at the University of Washington. He has also been Visiting Scholar at the University of Toronto, and presented special lectures at Queen's University, Trent University, Lakehead University, Simon Fraser University, the University of Toronto, and the University of Saskatchewan. In 2007, he was Visiting Professor at the Swinburne Institute for Social Research in Melbourne and an advisor to the Digital Future Report, Australia. In 2009, he will be Visiting Professor at The School of Journalism, University of British Columbia.

Dr. Fletcher's current research deals with the regulation of election campaigns, election campaign advertising, and the use of the Internet in Canada for political communication and the delivery of government services. He is also working on a study of the credibility of the news media and the future of news in the online world.

Dr. Fletcher was born in Vancouver and completed his BA (Dbl Hons) in English and Political Science at the University of British Columbia before going on to obtain his MA and PhD at Duke University.

Canadian Media Research Consortium / Consortium canadien de rescherche sur les médias

The **Canadian Media Research Consortium / Consortium canadien de rescherche sur les médias (CMRC)** promotes economic, social and cultural research in Canadian media and communications. Its partner members are the York/Ryerson Joint Graduate Programme in Culture and Communications, the University of British Columbia (UBC) Graduate School of Journalism, and the Centre d'études sur les médias.

The Consortium has the following mandate:

1. Undertake research that focuses on important economic, social and cultural issues related to technological change in the media.
2. Promote collaborative research by funding research projects, scholarships and related activities.
3. Disseminate research findings to the public by way of conferences, seminars and publications.

Since its founding in 2001, the CMRC has commissioned or supported a wide range of research projects, including studies of public attitudes towards the Canadian news media, the Canadian Internet Project's studies (2004 and 2007), Canadians and the news, quality in journalism, fairness in the news media, public financing of television program production in Canada, and the challenges posed for broadcast regulation by new technologies. The CMRC draws on researchers from a wide variety of research centres and universities to conduct its research projects and participate in its seminars and public events.

The CMRC's website — www.canadianmediaresearch.ca — provides summaries of current and past research studies, publications and reports.

The President of the CMRC is Donna Logan, Professor Emerita, and founding Director of The School of Journalism, University of British Columbia.

Robarts Centre for Canadian Studies

The mandate of the **Robarts Centre for Canadian Studies (Robarts Centre)** at York University is to promote and support interdisciplinary and discipline-specific research on Canada, and Canada in context with the rest of the world, including comparative research in relation to Canadian issues. The Robarts Centre provides administrative support and counsel on research-related issues for the Canadian Internet Project.

The Robarts Centre offers a strong program of high-level workshops and conferences on major issues, emphasizing Canadian perspectives on issues of communication and culture, fine arts, history, political economy, public policy and international relations. The centre provides a base for research initiatives related to its mandate.

Ongoing work at the centre includes research initiatives on public domain and international standards, Canadian culture, Canadian cinema and media perspectives on Canada. A current major project is *Global Cultural Flows, New Technology and the Re-imagining of National Communities*. Other ongoing work focuses on Canadian cultural policy in comparative perspective, children in Canadian culture, aboriginal rights, poverty and social inclusion, the information commons and the digital divide, poverty and sustainability, and international trade (with particular attention to the World Trade Organization), among others.

The centre provides research support to the Joint Graduate Program in Communication and Culture, a partnership of York and Ryerson Universities, and administrative support for several research initiatives.

The website for the Robarts Centre is located at www.robartscentre.com. The Director of the Centre is Seth Feldman, University Professor, Film and Video. The Associate Director is Daniel Drache, Professor of Political Science.

Appendix D World Internet Project

Overview

The World Internet Project (WIP) is a major international collaborative project that examines the social, political and economic impact of the Internet and other new technologies. Founded in 1999 by the Annenberg School Center for the Digital Future at the University of Southern California (USC), formerly the UCLA Center for Communication Policy, in collaboration with research centres in Singapore and Italy, WIP now has 28 partners in countries and regions all over the world. Canada, through the Canadian Internet Project and the Canadian Media Research Consortium, became a member in 2003.

Based at universities and research institutes around the world, WIP conducts detailed research, generates many publications and holds annual conferences that examine the impact of new technologies. WIP is committed to sharing the results of its work with leaders in the policy, government and business communities, as well as with journalists, parents, teachers and interested citizens.

All research projects are independently funded within member countries. While each national study is responsible for creating its own project and research methodology, every survey conducted includes a subset of approximately 30 questions asked of all respondents, which constitutes the basis for international comparison.

Members of WIP believe that the Internet and related digital technologies are transforming our social, political and economic lives and that the Internet will have a profound and important cultural influence on all societies. With this in mind, WIP is designed to document the social, economic and political transformations that are emerging as the Internet expands and evolves. The international comparisons made possible by WIP are essential to understanding the global changes that the new media area creating and enabling.

For further information on WIP and its members, see www.worldinternetproject.net.

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Table D-2 Summary of research methods used by participating countries in the 2007 World Internet Project study

Country	Research Methods Employed						
	Sample	Method of Interview	Weighted by Census Data?	Age of Respondents	Number of Interviews		Margin of Error (18+ at .05)
					Full sample	18+	
Australia	Representative quota	Telephone	Yes	18+	1,000	1,000	3.1
Canada	Representative probability	Telephone	Yes	12+	3,150	2,666	1.9
Columbia	Stratified probability	Telephone	Yes	12+	2,656	2,056	2.2
China (Urban)	Representative (major cities)	Telephone	Yes	N/A	N/A	1,898	2.3
Czech Republic	Representative probability	Face-to-face home interview	Yes	12+	1,586	1,408	2.6
Hungary	Stratified probability	Face-to-face home interview	Yes	14+	3,059	2,882	1.8
Israel	Representative probability	Telephone	Yes	N/A	501	421	4.8
Macao	Representative probability	Telephone	Yes	6+	1,951	1,614	2.4
New Zealand	Panel with replacement (random)	Telephone	Yes	12+	1,529	1,322	2.7
Singapore	Panel with replacement (random)	Telephone	Yes	13+	884	421	4.8
Sweden	Panel with replacement (random)	Telephone	Yes	18+	2,016	2,216	2.2
United Kingdom	Representative probability (stratified)	Face-to-face home interview	Yes	14+	2,350	2,209	2.1
United States	Representative probability (random)	Telephone and online	Yes	12+	2,021	1,800	2.3

Appendix E Survey Questionnaire

Final Merged Version (Adult and Youth)[23]

	INTRODUCTION [FOR NEW RESPONDENTS] **Hello, my name is _____ and I'm calling on behalf of Ryerson and York Universities. We are conducting an academic survey about media use in Canada and your household was selected randomly to participate in our study.** **May I continue?** [IF YES, GO TO QA] [IF HESITANT OR DOES NOT HAVE THE TIME RIGHT NOW] **May I call you back at a more convenient time? Once again, your phone number was selected randomly and in order to ensure the statistical relevance of our study, it is very important that we get responses from your household specifically.** [ONLY IF ASKED] **The total length of the survey will take between 15 and 35 minutes, depending upon the responses. If not convenient, I can phone back at another time. However, given your phone number was selected randomly, for statistical purposes, it is extremely important that I obtain responses from a member of your household.** [ONLY IF ASKED] **Our research project has been reviewed and approved by York University's Human Participants Review Committee for its compliance with the research ethic policies of the University. If you require further information, please contact Professor Charles Zamaria at 416 979-5107 or the HPRC office at 416 736-5914.** [IF YES, GO TO QA]

[23] **Table Legend**

TEXT TREATMENT OF QUESTIONS:	DEFINITION:
Bold	Components of questionnaire read to interview subject
Capitalized, square brackets	Instructions to interviewer
(CQxx)	Common question equivalency with the World Internet Project (WIP)
(C1.xxx)	Question equivalency with CIP1 2004 study
(ADULT ONLY)	Questions asked only of adult (18 years and over) respondents (n=2,750)
(YOUTH ONLY)	Questions asked only of youth (12–17 years) respondents (n=400)
(MERGED)	Adult and youth questions and responses combined

The final merged version of the questionnaire contains all questions asked of both the adult (18 years +) and youth (12–17) samples. Specific questions asked only of adult or youth respondents are labelled accordingly.

[FOR RESPONDENTS WHO PARTICIPATED IN THE PREVIOUS SURVEY (2004)]

Hello, my name is _____ and I'm calling on behalf of Ryerson and York Universities. May I please speak with _____.

[IF RESPONDENT IS NO LONGER AT THIS NUMBER, ASK FOR A NUMBER WHERE WE CAN REACH HIM / HER]

[WHEN THE NAMED RESPONDENT IS NOT AVAILABLE FOR THE DURATION OF THE SURVEY, ASK THE PERSON ON THE PHONE WHETHER THEY ARE INTERESTED IN DOING THE STUDY. SKIP TO INTRO BEFORE C2.001]

[WHEN RESPONDENT FROM PREVIOUS SURVEY ANSWERS PHONE OR AFTER YOU HAVE BEEN DIRECTED TO THIS INDIVIDUAL]

Hello, my name is _____ and I'm calling on behalf of Ryerson and York Universities.

We are conducting our second academic survey about media use in Canada. You may remember that we conducted an interview with you in 2004 and you indicated that we could call you back in a few years to follow-up. Our survey is being conducted around the world and we'd be very pleased if you would once again answer some questions for the Canadian component of the study.

Please be assured that we are not selling or soliciting anything. Your answers will be kept strictly confidential.

May I continue?

[IF YES, GO TO C2.001]

[IF HESITANT OR DOES NOT HAVE THE TIME RIGHT NOW]
May I call you back at a more convenient time? Since you completed the survey in 2004, it is extremely important that we specifically get your responses, as it will provide information on trends that are occurring. We would very much appreciate your participation once again.

[ONLY IF ASKED]
Our research project has been reviewed and approved by York University's Human Participants Review Committee for its compliance with the research ethic policies of the University. If you require further information, please contact Professor Charles Zamaria at 416 979-5107 or the HPRC office at 416 736-5914.

[IF YES, GO TO C2.001]

QA	QA. **May I please speak to the member in your household who is at least 18 years of age, speaks English or French and who will celebrate his/her birthday next?** **What is his/her first name?** **May I speak to him/her now?** [RECORD NAME] _____ [IF THE PERSON ON THE PHONE SATISFIES THE CONDITIONS ABOVE, GO TO C2.001] [IF UNAVAILABLE, PROBE FOR CALLBACK] [REPEAT INTRODUCTION ONLY IF NECESSARY] **Hello, my name is _____ and I'm calling on behalf of Ryerson and York Universities. We are conducting an academic survey about media use in Canada and you were selected randomly to participate in our study. Please be assured that we are not selling or soliciting anything. Your answers will be kept strictly confidential.** [IF YES, GO TO C2.001] [TELL RESPONDENT EVEN IF THEY ARE A NON-INTERNET USER, THEY CAN COMPLETE THE QUESTIONNAIRE] [IF HESITANT OR DOES NOT HAVE THE TIME RIGHT NOW] **May I call you back at a more convenient time? Once again, your phone number was selected randomly and in order to ensure the statistical relevance of our study, it is very important that we get responses specifically from you.** [ONLY IF ASKED] **The total length of the survey will take between 15 and 35 minutes, depending upon how you respond to certain questions. If not convenient, I can phone back at another time. However, given your phone number was selected randomly, for statistical purposes, it is extremely important that I obtain responses directly from you.** [ONLY IF ASKED] **Our research project has been reviewed and approved by York University's Human Participants Review Committee for its compliance with the research ethic policies of the University. If you require further information, please contact Professor Charles Zamaria at 416 979-5107 or the HPRC office at 416 736-5914.** [IF YES, GO TO C2.001]
SAMPLEID	SAMPLEID [INTERVIEWER TO RECORD ONE OF THE FOLLOWING SAMPLE CATEGORIES] 1 Adult, English speaking (not from panel) 2 Adult, French speaking (not from panel) 3 Adult, English speaking (panel / 2004 respondent) 4 Adult, French speaking (panel / 2004 respondent) 5 Youth, English speaking (child of adult respondent) 6 Youth, French speaking (child of adult respondent)

	7 Youth, English speaking (new respondent) 8 Youth, French speaking (new respondent) [NOTE: CODE 'PANEL' RESPONDENT ONLY IF EXACT PERSON INTERVIEWED IN CIP1/2004 STUDY. IF RESPONDENT IN SAME HOUSEHOLD, CODE AS 'NOT PANEL']
C2.001	C2.001. (C1.001/QC) **Just to be sure I ask you the proper questions, I need to know your response to the following**. **What language did you first learn at home in childhood and do you still understand?** [RECORD UP TO 2 MENTIONS] [DO NOT READ] 1 English 2 French 75 None 76 Other [SPECIFY] _____ 77 Don't know 99 Refused
C2.002 (YOUTH AUTO-CODED) (CQ1A)	C2.002. (C1.035PT/CQ1A) **Are you currently employed?** 1 Yes [GO TO C2.003] 2 No [SKIP TO C2.006] 7 Don't know 9 Refused [IF C2.002 = 2,7 OR 9, THEN SKIP C2.077A, C2.077B, C2.077C, C2.077D] [IF C2.002 = 2,7 OR 9, THEN SKIP C2.225]
C2.003 (ADULT ONLY)	C2.003. (C1.035PT) **Is that mostly…?** [READ] 1 **Full-time** [IF ASKED SAY: **"30 hours per week or more"**] 2 **Part-time** [IF ASKED SAY: **"less than 30 hours per week"**] 7 Don't know 9 Refused
C2.004 (ADULT ONLY)	C2.004. (C1.035PT) **Are you <u>self-employed</u>?** 1 Yes 2 No 7 Don't know 9 Refused [+1 IF C2.002 = 2,7 OR 9 AND C2.005 = 2,7 OR 9]

C2.005 (ADULT ONLY)	C2.005. (C1.036) **Do you work from home whether you are self-employed or not?** 1 Yes 2 No 7 Don't know 9 Refused
C2.006	C2.006. (C1.033) **Are you currently enrolled in school or will you be attending classes in the Summer or next Fall?** 1 Yes 2 No 7 Don't know 9 Refused [+1 IF C2.006 ≠ 1] [IF C2.006 = 1, THEN C2.008 = 2 AND SKIP C2.008] [IF C2.006 = 2, 7 OR 9, THEN SKIP C2.078A, C2.078B, C2.078C, C2.078D]
C2.007	C2.007. (C1.034) **For school, are you attending…?** [READ] 1 **Full-time** 2 **Part-time** 7 Don't know 9 Refused [+1 IF C2.007 = 1 OR 2]
C2.008 (CQ1B)	C2.008. (C1.035PT/CQ1B) **Are you…?** [READ] 1 **A stay at home housewife or househusband** 2 Student [AUTO-CODE FROM C2.006; DO NOT ASK QUESTION IF STUDENT] 3 **Unemployed** 4 **Retired** 76 **Other** [SPECIFY] _____ 77 Don't know 99 Refused [IF C2.008 = 1, THEN CODE C2.264 = 9, AND SKIP C2.264]
	Could you tell me whether your household has any of the following functioning devices? [READ; RANDOMIZE]

C2.009 C2.010 C2.011 C2.012 C2.013 C2.014 C2.015 C2.016 C2.017 C2.018 C2.019 C2.020 C2.021	A. **PalmPilot or PDA** [SAY ONLY IF NEEDED: **"Personal Digital Assistant"**] (C1.002) B. **Portable game system such as Game Boy, PSP, and so on** (C1.004) C. **Video game console** [SAY ONLY IF NEEDED: **"Playstation, Nintendo, Xbox and so on"**] (C1.004) D. **DVD player or VCR** (C1.005) E. **Digital Video Recorder or PVR** [SAY ONLY IF NEEDED: **"Personal Video Recorder device such as TiVo"**] F. **Portable MP3 player** (C1.007) G. **Cable TV** (C1.008) H. **Satellite TV** (C1.009) I. **High definition TV or HDTV** J. **Set-top box that allows you to receive HDTV** K. **Set-top box that allows you to receive video-on-demand services** L. **Sling box or Apple TV** [IF ASKED SAY: **"An electronic device that allows you to watch TV on your computer from anywhere"**] M. **Cell phone** (C1.003) 1 Yes 2 No 7 Don't know 9 Refused [+2 IF C2.021 = 2,7 OR 9] [IF C2.021 = 2,7 OR 9, THEN SKIP C2.039]
C2.022	C2.022. **Do you personally use a cell phone?** 1 Yes 2 No 7 Don't know 9 Refused
C2.023 C2.024 C2.025 C2.026 C2.027 C2.028 C2.029	**Besides making phone calls, do you use your cell phone...?** [READ; RANDOMIZE] A. **To take pictures** B. **To listen to or download music** C. **To send or receive text messages** D. **To surf the Web or send e-mails** E. **To download ringtones** F. **To play games** G. **To watch video, TV, or other content** 1. Yes 2. No 7 Don't know 9 Refused

MEDIA USE WHEN NOT ON THE INTERNET

I'd like to ask you about the amount of time you spend on various media and activities. In your answers, please consider carefully the average time per week including weekdays and weekends.

During a typical week, how many hours and minutes, if any, do you spend on the following activities that are *not* on the Internet?

[RECORD 4 DIGITS, 2 FOR HOURS AND 2 FOR MINUTES; E.G., 30 MINUTES WOULD BE RECORDED AS: 0030; 1 HOUR AND 30 MINUTES WOULD BE RECORDED AS: 0130]

[READ; INDEPENDENTLY RANDOMIZE BLOCK BELOW]

C2.030	A.	**Watching television** (C1.010/CQ15A)
C2.031	B.	**Listening to radio** (C1.017/CQ15B)
C2.032	C.	**Reading newspapers** (C1.016PT/CQ15C)

[READ; INDEPENDENTLY RANDOMIZE BLOCK BELOW]

C2.033	D.	**Reading magazines** (C1.016PT)
C2.034	E.	**Reading books** (C1.011)
C2.035	F.	**Watching movies or pre-recorded TV programs at home from a DVD, VHS or PVR** [IF ASKED SAY: "**Personal Video Recorder**"] (C1.013)
C2.036	G.	**Watching movies in the theatre** (C1.012)
C2.037	H.	**Playing video games from a console or portable device not on the Internet** (C1.014)
C2.038 *	I.	**Listening to music on CDs, tapes, albums or MP3 files** (C1.015)
C2.038Y1 *	J.	**Listening to music on CDs, tapes or albums**
C2.038Y2 *	K.	**Listening to MP3 files**
C2.039	L.	**Talking on a cell phone** (C1.018)
C2.040	M.	**Talking on the phone, not including your cell phone** (C1.019)
C2.041	N.	**Attending sporting or live entertainment events**
C2.042	O.	**Attending performing arts or other cultural venues**

(* C2.038 SPLIT FOR YOUTH) (CQ15-ABC)

_ _ _ _	Hours [4 DIGITS]
0 0 0 0	None / zero hours
7 7 7 7	Don't know
9 9 9 9	Refused

IMPORTANCE OF MEDIA TYPES AS INFORMATION / ENTERTAINMENT SOURCES

And now, I'd like to ask you about all different kinds of sources you use to obtain either information or entertainment.

	How important to you is each of the following sources for <u>information in general</u>? Please use a scale of 1 to 5 where '1' means "Not at all important," '2' means "Not important," '3' means "Neutral or undecided," '4' means "Important," and '5' means "Very important." [READ; INDEPENDENTLY RANDOMIZE BLOCK BELOW]
C2.043 C2.044 C2.045 C2.046 C2.047	A. **The Internet** (C1.030/CQ13A) B. **Television** (C1.028/CQ13B) C. **Newspapers** (C1.022/CQ13C) D. **Radio** (C1.026/CQ13D) E. **Interpersonal sources, for example, family and friends** (CQ13E) [READ; INDEPENDENTLY RANDOMIZE BLOCK BELOW]
C2.048 C2.049	F. **Books** (C1.020) G. **Magazines** (C1.024)
(CQ13-ABCDE)	1 Not important at all 2 Not important 3 Neutral or undecided 4 Important 5 Very important 7 Don't know 9 Refused
	And how important to you is each of the following sources for <u>entertainment</u>? [IF ASKED SAY: **"Use a scale of 1 to 5 where '1' means "Not at all important," '2' means "Not important," '3' means "Neutral or undecided," '4' means "Important," and '5' means "Very important."**] [READ; INDEPENDENTLY RANDOMIZE BLOCK BELOW]
C2.050 C2.051 C2.052 C2.053	A. **The Internet** (C1.031/CQ14A) B. **Television** (C1.029/CQ14B) C. **Newspapers** (C1.023/CQ14C) D. **Radio** (C1.027/CQ14D) [READ; INDEPENDENTLY RANDOMIZE BLOCK BELOW]
C2.054 C2.055 C2.056	E. **Interpersonal sources, for example, family and friends** F. **Books** (C1.021) G. **Magazines** (C1.025)
(CQ14-ABCD)	1 Not important at all 2 Important 3 Neutral or undecided 4 Important 5 Very important 7 Don't know 9 Refused

	ANXIETY AND ENTHUSIASM FOR TECHNOLOGY (SOCIAL VALUES) **I would like to ask about how you feel, in general, about technology.**
	I'm going to read you a series of statements. Using a scale of 1 to 4, please tell me how much you agree or disagree where '1' means "Totally agree," '2' means "Agree somewhat," '3' means "Disagree somewhat," and '4' means "Totally disagree." [READ, RANDOMIZE]
C2.057	A. **I am excited by the possibilities represented by new technologies**
C2.058	B. **I always keep informed about the latest technological developments**
C2.059	C. **When a new technological product comes on the market, I can't wait to try it**
C2.060	D **I look forward to the many new experiences that advances in computer technology will bring**
C2.061	E. **New technologies are causing more problems than they are solving**
C2.062	F. **With all of the developments in technology and computers, I find it difficult to keep up**
C2.063	G. **I worry where science is taking us** 1 Totally agree 2 Agree somewhat 3 Disagree somewhat 4 Totally disagree 7 Don't know 9 Refused
	USE OF A COMPUTER **I now have a few questions about your use of computers.** [IF ASKED SAY: **"By computers, I mean desktop PCs or portable laptop computers."**]
C2.064	C2.064. (C1.032) **How many functioning computers, if any, are used in your home?** _ _ Computers [RECORD UP TO 2 DIGITS] 0 0 None 7 7 Don't know 9 9 Refused [+2 IF C2.064 = 00]
	Do you have any of the following functioning devices in your household?
C2.065	A. **Computer networking device**
C2.066	B. **Wireless router or other wireless device**

	1 Yes 2 No 7 Don't know 9 Refused
	INTERNET IMPRESSIONS **Whether you use it or not, we are very interested about your opinions on the Internet.** [IF NECESSARY SAY: **"The Internet is a communications network accessed via a personal computer. Internet services include the World Wide Web, e-mail and other on-line services."**]
C2.067 (CQ12)	C2.067. (C1.140/CQ12) **Overall, how much of the information on the World Wide Web do you think is generally reliable? Would you say…?** [READ] 1 **None of it** 2 **A small portion of it** 3 **About half of it** 4 **Most of it** 5 **All of it** 7 Don't know 9 Refused
C2.068	C2.068. **In comparison, how much of the information on <u>television</u> do you think is generally reliable?** [READ ONLY IF ASKED] 1 None of it 2 A small portion of it 3 About half of it 4 Most of it 5 All of it 7 Don't know 9 Refused
C2.069	C2.069. **And for <u>newspapers</u>, how much of the information found in them do you think is generally reliable?** [READ ONLY IF ASKED] 1 None of it 2 A small portion of it 3 About half of it 4 Most of it 5 All of it

	7 Don't know 9 Refused
C2.070 (ADULT ONLY) (CQ7)	C2.070. (C1.041R/CQ7) **Whether you use the Internet or not, how concerned are you or would you be about the security of your credit or bank card information when or if you were to buy something online? Would you say you are…?** [READ] 1 **Not at all concerned** 2 **Somewhat concerned** 3 **Very concerned** 4 **Extremely concerned** 6 **I don't have a credit or bank card** 7 Don't know 9 Refused
  C2.071 (CQ2)	<u>USER / NON-USER SPLIT</u> C2.071. (C1.042/CQ2) **Do you currently use the Internet <u>from home or from any other place</u>?** [IF ASKED SAY: **"By currently, we mean in the last three months, from any location or facility, whether work, home, school or otherwise."]** 1 Yes [CONTINUE] 2 No [GO TO C2.230] 7 Don't know [CANNOT ACCEPT; "7 DON'T KNOW" AS A RESPONSE TO THIS QUESTION] 9 Refused [IF C2.071 = 2, THEN SKIP C2.240] [NOTE SPLIT: USERS CONTINUE; NON-USERS GO TO C2.230]
	<u>INTERNET USERS ONLY</u>
C2.072 (CQ5)	C2.072. (C1.043/CQ5) **How many years have you been using the Internet?** [RECORD 2 DIGITS FOR YEARS, 2 DIGITS FOR MONTHS IF PROVIDED AND/OR IF LESS THAN ONE YEAR] _ _ Years [2 DIGITS] _ _ Months [2 DIGITS] 7 7 Don't know 9 9 Refused

C2.073 (CQ19-PTR)	C2.073. (C1.044R/CQ19PTR) **What type of Internet connection(s) do you have in your home?** [DO NOT READ; PROBE IF NECESSARY; MULTIPLE MENTIONS OK] 1 Telephone, with dial-up modem 2 Telephone, always-on [IF ASKED SAY: **"DSL or high speed"**] 3 Cable 4 Satellite or wireless 5 Connected through television 6 Cell phone 7 Personal digital assistant (PDA) 75 None 76 Other [SPECIFY] _____ 77 Don't know 99 Refused
C2.074 (CQ19-PTR)	C2.074. (C1.045/CQ19PTR) **Is this a high-speed and always-on broadband connection?** 1 Yes 2 No 7 Don't know 9 Refused
C2.075 (CQ4-5)	C2.075. (CQ4-5) **Do you use the Internet through <u>wireless devices</u> such as a cell phone, PDA or wireless computer from any location?** 1 Yes 2 No 7 Don't know 9 Refused [IF C2.075 = 1, THEN GO TO "INTERNET TIME INTRO B"] [IF C2.075 = 2, 7 OR 9, THEN GO TO "INTERNET TIME INTRO A"]
INTERNET TIME INTRO A C2.076A C2.077A C2.078A C2.079A	INTERNET TIME INTRO A **Now I want you to carefully consider how much time you spend on the Internet while in locations during a typical week, including the time you spend both on weekdays and weekends. On average, about how many hours per week do you use the Internet from a <u>wired PC</u>…?** [IF ASKED SAY: **"personal computer"**] [RECORD 4 DIGITS, 2 FOR HOURS AND 2 FOR MINUTES; E.G., 30 MINUTES WOULD BE RECORDED AS: 0030; 1 HOUR AND 30 MINUTES WOULD BE RECORDED AS: 0130] [READ; DO <u>NOT</u> RANDOMIZE] A1. **At home, for any reason** (C1.046PT/CQ4-1) A2. **At work, not in the home** (C1.047PT/CQ4-2) A3. **At school, outside your home** (C1.048PT/CQ4-3) A4. **At a friend's or relative's home** (C1.049PT/CQ4-4PT)

C2.080A C2.081A	A5. **At a public facility like a library or Internet café** (C1.050PT/CQ4-4PT) A6. **From anywhere else** [SPECIFY] _____ (C1.052PT/CQ4-4PT) _ _ _ _ Hours / Minutes [4 DIGITS] 0 0 0 0 None / zero hours 7 7 7 7 Don't know 9 9 9 9 Refused
(CQ4-1,2,3,4)	[IF SUM OF C2.076A THROUGH C2.081A = 0 0 0 0, THEN PROBE FOR RESPONSE / TIME ESTIMATE IN ONE OF THE CATEGORIES ABOVE]
INTERNET TIME INTRO B	INTERNET TIME INTRO B **Now I want you to carefully consider how much time you spend on the Internet while in locations during a typical week, including the time you spend both on weekdays and weekends. And I'd like you to consider the time you are online for any reason from either a <u>wired PC</u>, <u>cell phone or mobile device</u>, and a <u>wireless computer</u> across several locations. On average, about how many hours per week do you use the Internet…?** [ONLY IF ASKED: **"PC means personal computer"**] [ONLY IF ASKED: **"a mobile device includes a PDA such as a BlackBerry or PalmPilot"]** [RECORD 4 DIGITS, 2 FOR HOURS AND 2 FOR MINUTES; E.G., 30 MINUTES WOULD BE RECORDED AS: 0030; 1 HOUR AND 30 MINUTES WOULD BE RECORDED AS: 0130]
	[READ; DO <u>NOT</u> RANDOMIZE]
C2.076B	B1. **At home, from a wired PC** (C1.046PT/CQ4-1)
C2.076C	C1. **At home, from a wireless computer** (C1.046PT/CQ4-5BPT)
C2.076D	D1. **At home, from a cell phone or mobile device** (C1.046PT/CQ4-5APT)
C2.077B	B2. **At work, not in the home, from a wired PC** (C1.047/CQ4-2)
C2.077C	C2. **At work, from a wireless computer** (C1.047PT/CQ4-5BPT)
C2.077D	D2. **At work, from a cell phone or mobile device** (C1.047PT/CQ4-5APT)
C2.078B	B3. **At school, outside your home, from a wired PC** (C1.048/CQ4-3)
C2.078C	C3. **At school, from a wireless computer** (C1.048PT/CQ4-5BPT)
C2.078D	D3. **At school, from a cell phone or mobile device** (C1.048PT/CQ4-5APT)
C2.079B	B4. **At a friend's or relative's home, from a wired PC** (C1.049PT/CQ4-4PT)
C2.079C	C4. **At a friend's or relative's home, from a wireless computer** (C1.049PT/CQ4-5BPT)
C2.079D	D4. **At a friend's or relative's home, from a cell phone or mobile device** (C1.049PT/CQ4-5APT)
C2.080B	B5. **At a public facility like a library or Internet café, from a wired PC** (C1.050PT/CQ4-4PT)
C2.080C	C5. **At a public facility like a library or Internet café, from a wireless computer** (C1.050PT/CQ4-5BPT)
C2.080D	D5. **At a public facility like a library or Internet café, from a cell phone or mobile device** (C1050PT/CQ4-5APT)

C2.081B C2.081C C2.081D (CQ4 1,2,3,4/ CQ4PT5AB) (NOTE: C2.082= ANY PC, C2.083= ALL DEVICES)	B6. **From anywhere else, on a wired PC** [SPECIFY] _____ (C1.052PT/CQ4-4PT) C6. **From anywhere else, on a wireless computer** [SPECIFY] _____ (C1.052PT/CQ4-5APT) D6. **From anywhere else, on a cell phone or mobile device** [SPECIFY] _____ (C1.052PT/CQ4PT-5APT) _ _ _ _ Hours / Minutes [4 DIGITS] 0 0 0 0 None / zero hours 7 7 7 7 Don't know 9 9 9 9 Refused [IF SUM OF C2.076B THROUGH C2.081D = 0 0 0 0, THEN PROBE FOR RESPONSE / TIME ESTIMATE IN ONE OF THE CATEGORIES ABOVE]
C2.084	C2.084. (C1.061/C1.058R) **In a typical week, how much time do you spend specifically reading or writing <u>e-mails</u>?** [RECORD 4 DIGITS, 2 FOR HOURS AND 2 FOR MINUTES; E.G., 30 MINUTES WOULD BE RECORDED AS: 0030; 1 HOUR AND 30 MINUTES WOULD BE RECORDED AS: 0130] _ _ _ _ Hours / Minutes [4 DIGITS] 0 0 0 0 None / zero hours 7 7 7 7 Don't know 9 9 9 9 Refused
C2.084Y1 (YOUTH ONLY)	C2.084Y1. **And in a typical week, how much time do you spend specifically reading or writing t<u>ext messages</u>?** [RECORD 4 DIGITS, 2 FOR HOURS AND 2 FOR MINUTES; E.G., 30 MINUTES WOULD BE RECORDED AS: 0030; 1 HOUR AND 30 MINUTES WOULD BE RECORDED AS: 0130] _ _ _ _ Hours / Minutes [4 DIGITS] 0 0 0 0 None / zero hours 7 7 7 7 Don't know 9 9 9 9 Refused
C2.085	C2.085. **And when you are online, what percentage of time in a typical week do you communicate with others through e-mail, instant messaging and or other means as opposed to engage in other Internet and Web activities?** _ _ _ % [UP TO 3 DIGITS] 7 7 7 Don't know 9 9 9 Refused
	<u>INTERNET ACTIVITIES</u>

C2.086 C2.087 C2.088 C2.089 C2.090 C2.091 C2.092 (CQ20-ABCDEF)	**Now I'd like you to think about the different ways people interact and communicate with each other in their everyday lives. <u>On average</u>, how often do you use the Internet for the following purposes…? Please answer: "Several times a day, Daily, Weekly, Monthly, Less than monthly, or Never." How often do you…?** [READ; RANDOMIZE] A. **Check your e-mail** (C1.061R/CQ20A) B. **Send or receive instant messages** [IF ASKED SAY: **"like MSN or ICQ"**] (C1.062R/CQ20B) C. **Participate in chat rooms** (C1.063R/CQ20C) D. **Send attachments with your e-mail** (CQ20D) E. **Make or receive phone calls over the Internet** (C1.068R/CQ20E) F. **Work on your Blog** (CQ20F) G. **Contribute to your personal website** 1 Never 2 Less than monthly 3 Monthly 4 Weekly 5 Daily 6 Several times a day 7 Don't know 9 Refused
C2.093	C2.093. (C1.066R/C1.069R) **To what extent have e-mail and other Internet services such as VoIP or telephone on the Internet reduced your use of the <u>traditional phone</u>? Would you say it has…?** [IF ASKED SAY: **"VoIP means 'Voice-over Internet Protocol' and refers to a technique to make phone calls on the Internet"]** [READ] 1 **Reduced to no extent at all** 2 **Reduced to some extent** 3 **Reduced to a large extent** 4 **Completely replaced** 7 Don't know 9 Refused
C2.094	C2.094. **When you open your Internet browser, what is your <u>home page</u>?** [IF ASKED SAY: **"the first page you typically see?"**] [DO NOT READ] 1 google [.ca / .com NOT IDENTIFIED] 2 google.ca 3 google.com 4 msn [.ca / .com NOT IDENTIFIED] 5 msn.ca 6 msn.com 7 sympatico.ca 8 yahoo [.ca / .com NOT IDENTIFIED]

	9 yahoo.ca 10 yahoo.com 76 Other [SPECIFY] _____ [PROBE FOR .CA OR .COM IF NECESSARY] 77 Don't know 99 Refused
C2.095 C2.096 C2.097 C2.098 C2.099 C2.100 C2.100Y1 * C2.101 C2.101Y1 * C2.102 (* YOUTH ONLY)	**How frequently, if ever, do you use the Web for the following purposes?** [IF ASKED SAY: **"Several times a day, Daily, Weekly, Monthly, Less than monthly, Never"**] [READ, RANDOMIZE] A. **Read or contribute to a blog** B. **Read or contribute to a wiki** C. **Visit a social networking or community site** [IF C2.097 = 1, THEN SKIP C2.104 AND C2.105] D. **Post or contribute anything to a community or social networking site** E. **Post messages on a website or online discussion board** F. **Post photos anywhere on the Web** G. **Download photos anywhere on the Web** H. **Post video anywhere on the Web** I. **Download video anywhere on the Web** J. **Send any original creation anywhere on the Web** 1 Never 2 Less than monthly 3 Monthly 4 Weekly 5 Daily 6 Several times a day 7 Don't know 9 Refused
C2.103	C2.103. **When you use the Internet, how often is someone else physically beside you participating in or watching the online activity?** [READ] 1 **Never** 2 **Seldom** 3 **Sometimes** 4 **Often** 7 Don't know 9 Refused
C2.104	C2.104 **What community or social networking sites do you visit on a regular basis?** [RECORD UP TO 5 MENTIONS; PROBE FOR MORE RESPONSES IF ONLY 1 OR 2 RESPONSES. IF ASKED SAY: **"such as YouTube, MySpace, Facebook and so on"**]

	[DO NOT READ] 1 Facebook 2 MySpace 3 YouTube 75 None / nothing 76 Other [SPECIFY] _____ 77 Don't know 99 Refused
C2.105	C2.105. **What are the <u>main</u> reasons you like to visit and/or participate in community or social networking sites?** [RECORD UP TO 3 MENTIONS; PROBE FOR MORE RESPONSES IF ONLY 1 RESPONSE] _____ [SPECIFY] 75 None 77 Don't know 99 Refused
C2.105Y1 (YOUTH ONLY)	C2.105Y1. **How useful and important are community or social networking sites to you? Please answer using a scale of 1 to 5 where '1' means "Not important and all," '5' means "Very important," and '3' means "Neutral or undecided."** 1 1 Not at all important 2 2 3 3 Neutral or undecided 4 4 5 5 Very important 7 Don't know 9 Refused
C2.105Y3 (YOUTH ONLY)	C2.105Y3. **Do you feel that your participation with community or social networking sites has decreased your involvement and interaction with friends, family and other <u>offline</u> communities?** [READ; ROTATE] 1 **Not at all** 2 **Somewhat** 3 **A lot** 7 Don't know 9 Refused
	While online, how frequently, if ever, have you used any of the following? Please answer: "Never, Seldom, Sometimes or Often."

	[READ; RANDOMIZE] A. **Skype** [PRONOUNCED 'SKYP'] B. **Joost** [PRONOUNCED 'JEW-ST'] C. **Google Earth** D. **iTunes** E. **Other online music sites such as LimeWire** F. **Wikipedia** G. **Virtual world sites such as Second Life, Habbo Hotel, Club Penguin, and so on**
C2.106 C2.107 C2.108 C2.109 C2.110 C2.111 C2.112	1 Never 2 Seldom 3 Sometimes 4 Often 7 Don't know 9 Refused
	In the past year, have you had any of the following occur? [READ; RANDOMIZE]
C2.113 C2.114 C2.115 C2.116 C2.117 C2.118 C2.119	A. Mistakenly sent an e-mail message meant for an individual to a group B. Received obscene or abusive e-mails from strangers C. Received obscene or abusive e-mails from someone you know D. Received a virus onto your computer E. Been contacted by someone over the Internet from some foreign country, suggesting an arrangement to make money F. Been contacted by someone online asking you to provide bank details G. Been a victim of online phishing or scammed into surrendering your private information by an identity thief
(ADULT ONLY)	1 Yes 2 No 7 Don't know 9 Refused
C2.120 (ADULT ONLY)	C2.120. **In the past 6 months, what steps, if any, have you taken to help prevent some of the things I just read from happening?** [RECORD UP TO 3 MENTIONS] _____ [SPECIFY] 75 None / nothing 77 Don't know 99 Refused
	LANGUAGES USED

C2.121 (ADULT ONLY)	C2.121. (C1.084R) **Which language do you use <u>most often</u> on the Internet?** [RECORD ONLY 1 MENTION] [DO NOT READ; PROBE IF NECESSARY] 1 English 2 French 3 English and French equally 75 None 76 Other [SPECIFY] _____ 77 Don't know 99 Refused
C2.122 (ADULT ONLY)	C2.122. (C1.085R) **What other languages, if any, do you use on the Internet?** [RECORD UP TO 4 MENTIONS] [DO NOT READ; PROBE IF NECESSARY] 1 English 2 French 75 None 76 Other [SPECIFY] _____ 77 Don't know 99 Refused
	<u>MEDIA USE AND ACTIVITIES ON THE INTERNET</u> **Your responses are most appreciated.** **Now, I'd like to ask you about some of the things you do on the Internet.**
     C2.123 C2.124 C2.125 C2.126 C2.127 C2.128 C2.129	**Some people often look up information on the Internet as they go about their daily lives – things like news, sports scores and movie times – others don't. How frequently do you use the Internet for the following purposes? Do you look: "Several times a day, Daily, Weekly, Monthly, Less than monthly, or Never?"** [READ; INDEPENDENTLY RANDOMIZE BLOCK BELOW] A. **Look for local, national or international news** (C1.082R/C1.099R/CQ21A) [IF C2.123 = 1, THEN SKIP C2.139] B. **Look for travel information** (C1.097R/C1.105R/CQ21B) C. **Look for jobs or work** (C1.100R/CQ21C) D. **Read blogs or weblogs** (CQ21D) E. **Look for jokes, cartoons or other humorous content** (CQ21E) F. **Look for medical or health information** (C1.098R/CQ21F) [READ; INDEPENDENTLY RANDOMIZE BLOCK BELOW] G. **Check weather or traffic conditions**

C2.130 C2.131 C2.132 C2.133 C2.134 C2.135 C2.136 C2.137 C2.138 (CQ21-ABCDEF)	H. **Check a map or find an address** I. **Go to auction sites such as eBay** (C1.096R) J. **Look for sports information** (C1.107R) K. **Look up information about music or concerts** (C1.110R) L. **Look for books or information on authors** (C1.108R) M. **Look up information about cultural events, festivals, art exhibits, museums, theatre or plays** (C1.112R/C1.113R) N. **Check movie information or schedules** (C1.111R) O. **Search for information about a performer or musical artist** (C1.110R) P. **Look up recipes or information on cooking** (C1.106R) 1 Never 2 Less than monthly 3 Monthly 4 Weekly 5 Daily 6 Several times a day 7 Don't know 9 Refused [IF C2.123 = 1 'NEVER'; THEN SKIP C2.189]
C2.139	C2.139. (C1.083) **What Internet site do you <u>most often</u> visit for news?** [PROBE IF NECESSARY; CHECK IF CANADIAN SITE, ".CA" OR OTHER. PROBE FOR LOCAL, NATIONAL, INTERNATIONAL. RECORD UP TO 5 MENTIONS] [DO NOT READ] 1 bbc.com 2 cbc.ca 3 cnn.com 4 ctv.ca 5 globeandmail.com 75 None 76 Other [SPECIFY] _____ 77 Don't know 99 Refused
     C2.140 * C2.140Y1 ** C2.140Y2 ** C2.141 *	**Now I'd like to ask you about the routine Internet activities you engage in for <u>personal entertainment</u>. Please tell me how frequently you use the Internet for the following activities?** [IF ASKED SAY: **"Once again, is it: Several times a day, Daily, Weekly, Monthly, Less than monthly, or Never?"**] [READ; INDEPENDENTLY RANDOMIZE BLOCK BELOW] A. **Play games by yourself or with others online** (C1.087R/CQ22A) A1. **Play games by yourself** A2. **Play games with others online** B. **Download or listen to music** (C1.088R/C1.089R/CQ22B)

C2.141Y1 ** C2.141Y2 ** C2.142 * C2.142Y1 ** C2.142Y2 ** C2.143 C2.144 C2.145 * C2.146 C2.147 *	B1. **Download music from the Internet** B2. **Listen to music on the Internet** C. **Download or watch videos** (CQ22C) C1. **Download videos from the Internet** (CQ22C) C2. **Watch videos on the Internet** (CQ22C) D. **Look at religious or spiritual sites** (CQ22D) E. **Listen to radio stations online** (C1.091R/CQ22E) F. **Bet, gamble or enter lotteries** (CQ22F) G. **Surf or browse the Web** (CQ22G) H. **Look at sites with sexual content** (CQ22H) [READ; INDEPENDENTLY RANDOMIZE BLOCK BELOW]
C2.148 * C2.148Y1 ** C2.148Y2 ** C2.149 * C2.149Y1 ** C2.149Y2 ** C2.150 C2.151 C2.152 C2.153 C2.154	I. **Download, stream or watch movies or DVDs** (C1.093R) I1. **Download movies or DVDs** I2. **Stream or watch movies or DVDs on the Internet** J. **Download, stream or watch television** (C1.092R) J1. **Download television from the Internet** J2. **Stream or watch television on the Internet** K. **Download or listen to podcasts** L. **Download or read newspaper or magazines** (C1.090R) M. **Download or read books online** (C1.086R/C1.108R) O. **Visit a TV program website** (C1.095R) P. **Visit a broadcast station or network website** (C1.094R)
(*ADULT ONLY, ** SPLIT FOR YOUTH) (CQ22-ABCD EFGH)	1 Never 2 Less than monthly 3 Monthly 4 Weekly 5 Daily 6 Several times a day 7 Don't know 9 Refused
	Some people use the Internet for classes or to support their learning and others do not. How frequently, if ever, do you use the Internet or Web for the following purposes? Please answer; "Several times a day, Daily, Weekly, Monthly, Less than monthly, or Never." On average, how frequently do you…? [READ; INDEPENDENTLY RANDOMIZE BLOCK BELOW]
C2.155 C2.156 C2.157 C2.158 C2.159	A. **Look up a definition of a word** (CQ24A) B. **Find or check a fact** (CQ24B) C. **Get information for school-related work** (C1.056R/CQ24C) D. **Participate in distance learning for an academic degree or job training** (C1.057R/CQ24D) E. **Use a search engine like Google**
	1 Never 2 Less than monthly 3 Monthly 4 Weekly 5 Daily

(CQ24-ABCD)	6 Several times a day 7 Don't know 9 Refused
C2.159Y1 (YOUTH ONLY)	C2.159Y1. **How important is the Internet for your school work? Use a scale of 1 to 5 where '1' means "Not important" and '5' means "Very important."** 1 1 Not important 2 2 3 3 4 4 5 5 Very important 7 Don't know 9 Refused
C2.160	C2.160. **How often do you surf or browse on the Web without a specific destination in mind? Would you say…?** [READ] 1 **Never** 2 **Seldom** 3 **Sometimes** 4 **Often** 7 Don't know 9 Refused
C2.161 C2.162 C2.163 C2.164 C2.165 C2.166	**Since using the Internet, has your use of the following other media increased or decreased? Please use a scale of 1 to 5 where '1' means "Decreased greatly," '5' means "Increased greatly" and '3' means "Has not changed"?** [READ; RANDOMIZE] A. **Newspapers** B. **Magazines** C. **Television** (C1.138R) D. **Local broadcast radio** E. **Listening to recorded music on CDs, tapes or albums** (C1.139R) F. **Watching DVDs rented or purchased at a physical store** 1 1 Decreased greatly 2 2 3 3 Has not changed 4 4 5 5 Increased greatly 7 Don't know 9 Refused
	<u>DOWNLOADING CONTENT</u>

	Now I'd like to ask a few questions about downloading and streaming content from the Web. Once again, all your responses are for classification purposes only.
C2.167	C2.167. **In the past 6 months, have you ever paid to access, download or stream any content from the Web?** 1 Yes 2 No 7 Don't know 9 Refused [+1 IF C2.167 = 2,7 OR 9]
C2.168	C2.168. (C1.131) **What types of content do you <u>pay a fee to download, stream or access</u> from the Web?** [RECORD UP TO 5 MENTIONS; ONLY IF ASKED SAY: **"such as music, games, movies newspapers, and so on"**] [DO NOT READ] 1 Music 2 Games 3 Movies 4 Video 5 TV programs 6 Newspapers 7 Magazines 75 None / nothing 76 Other [SPECIFY] _____ 77 Don't know 99 Refused
C2.169	C2.169. **How often do you download content from the Web for free, when you know that there are other sites that would charge a fee for the same download? Would you say…?** [READ] 1 **Never** 2 **Seldom** 3 **Sometimes** 4 **Often** 7 Don't know 9 Refused
	And how often do you obtain content from the following sources on the Internet? Would you say: "Never, Seldom, Sometimes or Often?" [READ AND RANDOMIZE]

C2.170 C2.171 C2.172	A. **TV or broadcasting website** B. **Cable or satellite TV website** C. **File sharing services such as BitTorrent or Kazaa** 1 Never 2 Seldom 3 Sometimes 4 Often 7 Don't know 9 Refused
C2.173	C2.173. **How comfortable are you watching advertising, when content found on the Internet is free to access or use?** [READ] 1 **Not at all comfortable** 2 **Somewhat comfortable** 3 **Comfortable** 4 **Very comfortable** 7 Don't know 9 Refused
C2.174 C2.175	**Out of 100, what percentage of time do you spend using the Internet for <u>information</u> purposes as opposed to entertainment purposes?** [READ; MUST ADD TO 100%] A. **Information** (C1.053R) B. **Entertainment** (C1.054R) _ _ _% [SPECIFY; UP TO 3 DIGITS] 7 7 7 Don't know 9 9 9 Refused
C2.176	C2.176. **Which search engines do you use most often?** [RECORD UP TO 3 MENTIONS] _____ [SPECIFY] 75 None 77 Don't know 99 Refused
	<u>MULTI-TASKING</u> **I would now like to ask you some questions about other activities you may do at the same time you are using the Internet.**

C2.177 (CQ18)	C2.177. (CQ18) **How often do you do more than one activity while online such as listening to music, watching TV or using the telephone. Would you say…?** [READ] 1 **Never** 2 **Sometimes** 3 **Most of the time** 7 Don't know 9 Refused
C2.178	C2.178. **Out of 100, what percentage of time would you say you spend on the Internet while doing something else, whatever online activity that may be?** _ _ _ % [SPECIFY; 3 DIGITS; OUT OF 100] 7 7 7 Don't know 9 9 9 Refused [IF C2.178 = 000, THEN SKIP C2.179]
C2.179	C2.179. **What are the most common <u>other</u> activities you engage in while online? Please be specific.** [RECORD UP TO 5 MENTIONS. IF ONLY 1 OR 2 RESPONSES, PROBE FOR MORE] [DO NOT READ] 1 Watching television 2 Listening to radio 3 Reading newspapers 4 Reading magazines 5 Reading books 6 Watching movies or pre-recorded TV programs at home from a DVD, VHS or PVR 7 Watching movies in the theatre 8 Playing video games from a console or portable device not on the Internet 9 Listening to music on CDs, tapes, albums or MP3 files 10 Talking on a cell phone 11 Talking on the phone, not including your cell phone 75 None / nothing 76 OTHER [SPECIFY] _____ 77 Don't know 99 Refused
C2.180	C2.180. **Out of 100, what percentage of time do you spend on <u>your computer</u>, for any reason, and simultaneously watch TV?** _ _ _ % [SPECIFY; 3 DIGITS; OUT OF 100] 7 7 7 Don't know 9 9 9 Refused

C2.180Y1 (YOUTH ONLY)	C2.180Y1. **And out of 100, what percentage of time do you spend on the Internet, for any reason, and simultaneously <u>listen to music</u>?** _ _ _ % [SPECIFY; 3 DIGITS; OUT OF 100] 7 7 7 Don't know 9 9 9 Refused
	<u>CULTURAL CONTENT</u> **We are also interested in your opinion about <u>Canadian cultural content</u> found on the Internet. By cultural content, we mean movies, television, books, music, magazines, museum and art exhibits developed in Canada.**
C2.181	C2.181. (C1.115) **On a scale of 1 to 5, where '1' means "Never" and '5' means "Often," how frequently do you specifically seek out Canadian cultural content on the Internet?** 1 1 Never 2 2 3 3 4 4 5 5 Often 7 Don't know 9 Refused [IF C2.181 = 1, THEN ASK C2.182 AND SKIP TO C2.184] [IF C2.181 = 2 THROUGH 9, THEN SKIP C2.182, BUT ASK C2.183]
C2.182	C2.182. **Is there a reason why you don't specifically look for Canadian cultural content on the Web?** [RECORD UP TO 3 RESPONSES; IF 1 RESPONSE, PROBE FOR MORE] _____ [SPECIFY] 75 None 77 Don't know 99 Refused
C2.183	C2.183. **When you search specifically for Canadian cultural content on the Internet, how do you best find it? What search engine, website or media source do you use?** [RECORD UP TO 3 MENTIONS] [DO NOT READ] 1 Using a typical search engine like Google, Yahoo, or Sympatico, etc. 2 Using a specific cultural portal like culture.ca or artscanada.com, etc. 3 Using other media online, such as an online newspaper, TV website, or magazine 4 Using a specific blog, wiki or website

	5 A community or social networking site like YouTube, MySpace, Facebook and so on 76 Other [SPECIFY] _____ 77 Don't know 99 Refused
C2.184 C2.185 C2.186 C2.187 C2.188 C2.189	**On a scale of 1 to 5 where '1' means "Strongly disagree," '5' means "Strongly agree," and '3' means "Neutral or no opinion," please tell me how much you agree or disagree with the following statements?** [READ; RANDOMIZE] A. **It is hard to find Canadian cultural content online** (C1.118R) B. **Canadian cultural content on the Internet is very good** (C1.117R) C. **There is not enough Canadian cultural content on the Internet** (C1.116R) D. **When online, I find it difficult to distinguish what cultural content is Canadian** E. **When online, I do not care if the cultural content I search for is Canadian** F. **I am pleased with the diversity of Canadian content found online** 1 1 Strongly disagree 2 2 3 3 Neutral or no opinion 4 4 5 5 Strongly agree 7 Don't know 9 Refused
	<u>GOVERNMENT ON THE INTERNET</u> **Your responses have been very helpful. We are more than halfway through. I now want to ask you several questions about the Internet and government in Canada.**
C2.190 C2.191 C2.192 C2.193 C2.194	**In the past 12 months, have you visited any of the following kinds of Internet sites?** [READ; RANDOMIZE] A. **A federal government site** (C1.120) B. **A provincial government site** (C1.121) C. **A municipal government site** (C1.122) D. **A Canadian political party site or the site of a Canadian politician** (C1.123) E. **A non-government site that provides information on public policy** (C1.124) 1 Yes 2 No 7 Don't know 9 Refused
	And in the last 12 months, have you used the Internet for any of the following reasons? [READ; RANDOMIZE]

C2.195 C2.196 C2.197 C2.198 C2.199 C2.200 C2.201 (ADULT ONLY)	A. **To access information on a government program or service** (C1.125PT) B. **To submit your income tax return** C. **To download a government form or application** (C1.125PT) D. **To submit a government form or application** (C1.126) E. **To pay a fine, tax or licence fee** F. **To provide information or your opinion during an online government consultation or survey** (C1.127) G. **To communicate with an elected public official or civil servant** 1 Yes 2 No 7 Don't know 9 Refused
C2.202 (ADULT ONLY)	C2.202. **Would you be interested in voting online if you could and it was secure?** 1 Yes 2 No 7 Don't know 9 Refused
	ONLINE PURCHASES **I'd now like to ask you about your buying habits and product research you do online.**
C2.203 (ADULT ONLY) (CQ6)	C2.203. (C1.128R/CQ6) **In an average month, how many times do you purchase products or services over the Internet?** [IF ASKED SAY: **"not including bill payments like gas, phone, hydro bills or payments for your Internet connection."**] [RECORD UP TO 3 DIGITS. DO NOT ACCEPT RANGES] _ _ _ Times per month 0 0 0 None 7 7 7 Don't know 9 9 9 Refused [IF C2.203 = 000, 777 OR 999, SKIP C2.211, C2.213, C2.214]
     C2.204 C2.205 C2.206 C2.207	**Now I'd like you to think about different transactions you may or may not do online such as banking or shopping. How frequently do you use the Internet for the following purposes: "Several times a day, Daily, Weekly, Monthly, Less than monthly, or Never?" On average, how frequently do you…?** [READ; DO NOT RANDOMIZE] A. **Get information about a product** (CQ23A) B. **Buy things online** (CQ23B) C. **Make travel reservations or bookings** (CQ23C) D. **Pay bills** (CQ23D)

C2.208 C2.209 C2.210 (ADULT ONLY) (CQ23-ABCDEF)	E. **Use your bank's online services** (CQ23E) F. **Invest in stocks/funds/bonds <u>not including</u> your RSP** (CQ23F) G. **Use online banking services to access or make transactions to your RSP account** 1 Never 2 Less than monthly 3 Monthly 4 Weekly 5 Daily 6 Several times a day 7 Don't know 9 Refused
C2.211	C2.211. (C1.130) **What are the most common products or services you have ordered from the Internet in the past year?** [RECORD UP TO 5 RESPONSES; NOTE: IF ONLY 1 OR 2 ITEMS, ASK: **"Any other products and services?"**] [DO NOT READ] 1 Subscriptions – Internet site (C1: 1, C1.131R) 2 Books (C1: 2) 3 Music – CDs (C1: 3) 4 Computers or computer peripherals (C1: 4) 5 Computer – software (C1: 5) 6 Clothes (C1: 6) 7 Flowers (C1: 7) 8 Jewellery or watches (C1: 8) 9 Newspaper/magazine – subscriptions (C1: 9) 10 Newspaper/magazine – digital (C1: 10) 11 Stocks and bonds (C1: 11) 12 Electronic goods and appliances – home (C1: 12) 13 Food (C1: 13) 14 Drugs (C1: 14) 15 Furniture (C1: 15) 16 Travel – arrangements (car rentals, hotel) (C1: 16, C1.097R) 17 Sporting goods (C1: 17) 18 Products for hobbies (C1: 18) 19 Gifts (C1: 19) 20 DVDs or videos (C1: 20) 21 Children's goods/toys (C1: 21) 22 Collector's items (C1: 22) 23 Insurance (C1: 23) 24 Automobiles (C1: 24) 25 Games – computer 26 Tickets – sporting or entertainment events (C1: 29/30, C1.114R) 27 Music – MP3s 28 Games – other 29 Cosmetics (C1: 13) 30 Tickets – e-tickets (C1: 31) 31 Travel – airline or bus tickets (C1: 31)

(ADULT ONLY)	76 Other [SPECIFY] _____ 77 Don't know 99 Refused
C2.212 (ADULT ONLY)	C2.212. **How often, if ever, do you look for products and services online, but, when it comes time to buy, you purchase at a local store?** [READ] 1 **Never** 2 **Seldom** 3 **Sometimes** 4 **Often** 7 Don't know 9 Refused
C2.213 (ADULT ONLY)	C2.213. (C1.132) **Have your Internet purchases reduced your purchases of similar products and services from local retail stores? Would you say they have been…?** [READ] 1 **Not at all reduced** 2 **Reduced somewhat** 3 **Reduced a lot** 7 Don't know 9 Refused
C2.214 (ADULT ONLY)	C2.214. (C1.129) **When <u>ordering or purchasing on the Internet</u>, do you prefer to obtain products or services from…?** [READ] 1 **Canadian sites** 2 **US sites** 3 **Equally Canadian and US sites** 4 **Other foreign sites** 5 Don't care 7 Don't know 9 Refused
	<u>IMPACT OF INTERNET USAGE</u>
C2.215	C2.215. (C1.133R/CQ10) **Because of your access to the Internet, do you feel that your work performance and productivity has "Improved a lot, Improved somewhat, Stayed the same, Worsened somewhat, or Worsened a lot?"**

(ADULT ONLY) (CQ10)	1 Improved a lot 2 Improved somewhat 3 Stayed the same 4 Worsened somewhat 5 Worsened a lot 7 Don't know 9 Refused
C2.215Y1 (YOUTH ONLY)	C2.215Y1. **If you were to lose all access to the Internet from tomorrow onwards, would it be a problem for your everyday life, would it make no difference, or would it make your life better?** 1 Would be a problem 2 Would not make a difference 3 Would make my life better 7 Don't know 9 Refused
    C2.216 C2.217 C2.218 C2.219 (ADULT ONLY) (CQ11-ABCD)	**I am going to read you a list of statements. Please tell me how much you agree or disagree with each of these statements. Use a scale of 1 to 5 where '1' means "Strongly disagree" and '5' means "Strongly agree." Remember that you can choose any number between 1 and 5. Do you think that by using the Internet…?** [READ; RANDOMIZE] A. **People like you can have more political power** (C1.134/CQ11A) B. **People like you will have more say about what the government does** (C1.135/CQ11B) C. **People like you can better understand politics** (C1.136/CQ11C) D. **Public officials will care more what people like you think** (CQ11D) 1 1 Strongly disagree 2 2 3 3 4 4 5 5 Strongly agree 7 Don't know 9 Refused
    C2.220 C2.221 C2.222 C2.223 C2.224	**Has using the Internet increased or decreased your contact with the following groups? Please use a scale of 1 to 5 where '1' means "Greatly decreased," '5' means "Greatly Increased," and "3" means your contact with these groups has "Remained the same:"** [READ; RANDOMIZE] A. **People who share your hobbies and/or recreational activities** (CQ8A) B. **People who share your political interests** (CQ8B) C. **People who share your religion** (CQ8C) D. **Family** (C1.137PT/CQ8D) E. **Friends** (C1.137PT/CQ8E)

C2.225 (CQ8-ABCDEF)	[SKIP F IF UNEMPLOYED OR RETIRED] F. **People in your profession** (CQ8F) 1 1 Greatly decreased 2 2 3 3 Remained the same 4 4 5 5 Greatly increased 7 Don't know 9 Refused
C2.226 (CQ17)	C2.226. (CQ17) **During a typical week, how many hours and minutes do you spend socializing face-to-face with your family?** [RECORD 4 DIGITS, 2 FOR HOURS AND 2 FOR MINUTES; E.G., 30 MINUTES WOULD BE RECORDED AS: 0030; 1 HOUR AND 30 MINUTES WOULD BE RECORDED AS: 0130] _ _ _ _ Hours / Minutes [4 DIGITS] 7 7 7 7 Don't know 9 9 9 9 Refused
C2.227 (CQ16)	C2.227. (CQ16) **And during that same typical week, how many <u>hours and minutes</u> do you spend socializing face-to-face with your <u>friends</u>, outside of class time and/or office hours?** [RECORD 4 DIGITS, 2 FOR HOURS AND 2 FOR MINUTES; E.G., 30 MINUTES WOULD BE RECORDED AS: 0030; 1 HOUR AND 30 MINUTES WOULD BE RECORDED AS: 0130] _ _ _ _ Hours / Minutes [4 DIGITS] 7 7 7 7 Don't know 9 9 9 9 Refused
C2.228 (CQ9A)	C2.228. (C1.137PT/CQ9A) **Would you say that since being connected to the <u>Internet at home</u>, the <u>members of your household</u> have spent "more," "less," or the "same amount" of face-to-face time together?** 1 Less time together 2 Same amount of time together 3 More time together 7 Don't know 9 Refused
C2.229	C2.229. (C1.137PT/CQ9B) **And would you say that since being connected to the Internet, <u>you</u> have spent "more," "less," or the "same amount" of face-to-face time with your friends?** 1 Less time together 2 Same amount of time together 3 More time together

(CQ9B)	7 Don't know 9 Refused [GO TO C2.236]
	INTERNET NON-USERS ONLY
C2.230	C2.230. (C1.140) **Have you ever used the Internet before?** 1 Yes 2 No [SKIP C2.232, C2.233] 7 Don't know [SKIP C2.232, C2.233] 9 Refused [SKIP C2.232, C2.233]
C2.231 (CQ3)	C2.231. (C1.143R/CQ3) **What is the main reason you DO NOT use the Internet?** RECORD ONE MENTION ONLY. IF NECESSARY ASK: **"Which is the most important reason?"**] [DO NOT READ] 1 No interest / not useful 2 Don't know how to use / confused by technology 3 No computer or Internet connection 4 Too expensive / cannot afford fees or charges 5 No time / too busy 75 None / nothing 76 Other [SPECIFY] _____ 77 Don't know 99 Refused
C2.232	C2.232. **How many months and years ago did you stop using the Internet?** [RECORD 4 DIGITS FOR YEARS AND MONTHS; E.G., A YEAR AND A HALF = 0106, WHICH WILL BE CONVERTED TO 1.50 YEARS] _ _ Years [2 DIGITS] _ _ Months [2 DIGITS] 7 7 Don't know 9 9 Refused
C2.233	C2.233. (C1.141R) **When you used the Internet, where did you use it: in your home, at school, at work, or another location?** [RECORD UP TO 3 MENTIONS] [DO NOT READ; PROBE IF NECESSARY]

	1 Home 2 School 3 Work 4 Friends or family 5 Internet café 6 Library 7 Other public facility 76 Other [SPECIFY] _____ 77 Don't know 99 Refused
C2.234	C2.234. (C1.144) **Do you plan to use the Internet in the future?** 1 Yes 2 No 7 Don't know 9 Refused [+1 IF C2.234 = 2,7 OR 9]
C2.235	C2.235. (C1.145) **When do you plan to do it?** [READ] 1 **In the next 6 months** 2 **In the next 6-12 months** 3 **Later than 1 year** 4 **Never** 7 Don't know 9 Refused [GO TO C2.236]
	FOR ALL RESPONDENTS **I just have a few more general questions to ask. Thank you for your patience.**
C2.236	C2.236. (C1.146) **Using a scale of 1 to 5 where '1' means "Not important at all," '5' means "Extremely important," and '3' means "Neutral or no opinion," please tell me how important is it for you to get information and news specifically from Canadian sources?** 1 1 Not important at all 2 2 3 3 Neutral or no opinion 4 4 5 5 Extremely important 7 Don't know 9 Refused

C2.237	C2.237. (C1.147) **And how important is it for you to get your <u>entertainment</u> specifically from <u>Canadian</u> sources?** [READ ONLY IF ASKED] 1 1 Not important at all 2 2 3 3 Neutral or no opinion 4 4 5 5 Extremely important 7 Don't know 9 Refused
C2.238	C2.238. (C1.146) **How comfortable do you feel using new technologies in general? Please answer on a scale from 1 to 5 where '1' means "Not very comfortable" and '5' means "Very comfortable."** 1 1 Not very comfortable 2 2 3 3 4 4 5 5 Very comfortable 7 Don't know 9 Refused
C2.239 C2.240 C2.241 C2.242 (ADULT ONLY)	**Using a scale of 1 to 5 where '1' means "Strongly disagree,"'5' means "Strongly agree," and '3' means "Neutral or no opinion," please tell me if you agree or disagree with the following, whether you use the Internet or not:** [READ; RANDOMIZE] A. **Newspaper and television are more accurate and reliable than the Internet for news** B. **I have stopped a subscription to a newspaper or magazine because I now get the same or related content online** [IF C2.071 = 2, THEN SKIP C2.240] C. **There should be more government control of the Internet** D. **E-mail is a secure way to communicate** 1 1 Strongly disagree 2 2 3 3 Neutral or no opinion 4 4 5 5 Strongly agree 7 Don't know 9 Refused
	<u>OTHER PEOPLE IN HOUSEHOLD</u> **Now, I'd like to ask you a few questions about the people who live in your household.**

C2.243 (CQ31)	C2.243. (C1.151/CQ31) **How many people aged 18 years or older are living in your household?** _ _ Number of adults [RECORD UP TO 2 DIGITS] 7 7 Don't know 9 9 Refused
C2.244 (CQ30)	C2.244. (C1.152/CQ30) **And how many children under 18 years old are living in your household?** _ _ Number of children <18 years [RECORD UP TO 2 DIGITS] 7 7 Don't know 9 9 Refused [IF C2.244 = 00, THEN GO TO C2.261]
   C2.245 C2.246 C2.247	**Of these, how many are children…?** [READ] A. **Between 0 and 5 years old** (C1.153) B. **Between 6 and 11 years old** (C1.154) C. **Between 12 and 17 years old** (C1.155) 0 None 1 One 2 Two 3 Three 4 Four 5 Five 6 Six or more 7 Don't know 9 Refused
	<u>CHILDREN / YOUTH SELECTION</u> [IF ONLY ONE YOUTH 12–17, SELECT; IF SEVERAL, SELECT THE ONE WHO WILL BE THE NEXT TO CELEBRATE HIS/HER BIRTHDAY; IF NO YOUTH 12–17, SELECT THE OLDEST CHILD 6–11] **I now want to ask you some questions about <your/one of your> <child's/children's> Internet usage.**
  C2.248 (ADULT ONLY)	**Could you tell us the age and sex of that child?** A. Age (C1.156) _ _ [RECORD AGE IN YEARS] 7 7 Don't know 9 9 Refused

C2.249 (ADULT ONLY)	B. Gender (C1.157) 1 Male 2 Female 7 Don't know 9 Refused
C2.250 (ADULT ONLY)	C2.250. (C1.158) **Does <he/she> use the Internet?** 1 Yes 2 No [GO TO C2.261] 7 Don't know [GO TO C2.261] 9 Refused [GO TO C2.261]
C2.251 (ADULT ONLY)	C2.251. (C1.159) **How much time does <he/she> spend on the Internet in a typical week, <u>not</u> including at school?** [RECORD 4 DIGITS, 2 FOR HOURS AND 2 FOR MINUTES; E.G., 30 MINUTES WOULD BE RECORDED AS: 0030; 1 HOUR AND 30 MINUTES WOULD BE RECORDED AS: 0130] _ _ _ _ Hours / Minutes [4 DIGITS] 0 0 0 0 None / zero hours 7 7 7 7 Don't know 9 9 9 9 Refused
C2.252 (ADULT ONLY)	C2.252. (C1.160) **Do you feel that <u>your child</u> has the skills and knowledge required to browse the Internet <u>safely</u>? Please answer using a scale of 1 to 5 where '1' means "Strongly disagree" and '5' means "Strongly agree."** 1 1 Strongly disagree 2 2 3 3 4 4 5 5 Strongly agree 7 Don't know 9 Refused
C2.252Y1 (YOUTH ONLY)	C2.252Y1. **Do you feel <u>you</u> have the skills and knowledge required to browse the Internet <u>safely</u>? Please answer using a scale of 1 to 5 where '1' means "Strongly disagree" and '5' means "Strongly agree."** 1 1 Strongly disagree 2 2 3 3 4 4 5 5 Strongly agree 7 Don't know 9 Refused

C2.253 (ADULT ONLY)	C2.253. **How often do <u>you</u> monitor your child's Internet activities?** [READ] 1 **Never** 2 **Seldom** 3 **Sometimes** 4 **Often** 7 Don't know 9 Refused
C2.253Y1 (YOUTH ONLY)	C2.253Y1. **How often do <u>your parents</u> monitor your Internet activities?** [READ] 1 **Never** 2 **Seldom** 3 **Sometimes** 4 **Often** 7 Don't know 9 Refused
C2.254 (ADULT ONLY)	C2.254. **How frequently are <u>you</u> physically present or do you co-surf with your child when they use the Internet?** [READ] 1 **Never** 2 **Seldom** 3 **Sometimes** 4 **Often** 7 Don't know 9 Refused
C2.254Y1 (YOUTH ONLY)	C2.254Y1. **How frequently is <u>one of your parents</u> physically present or do they co-surf with you when you use the Internet?** [READ] 1 **Never** 2 **Seldom** 3 **Sometimes** 4 **Often** 7 Don't know 9 Refused
	I'd now like to read you several statements about the Internet and your child. Using a scale of 1 to 5 where '1' means "Strongly disagree," '5' means "Strongly agree," and '3' means "Neutral or no opinion," please tell me whether you agree or disagree with the following:

	[READ; DO NOT RANDOMIZE]
C2.255	A. **My child's use of the Internet has taken him/her away from other important activities**
C2.256	B. **My child's use of the Internet has taken him/her away from time with friends and family**
C2.257	C. **Since my child has been using the Internet, he/she watches less television** (C1.162R)
C2.258	D. **I am concerned about my child communicating with unknown or unwelcome other persons while online**
C2.259	E. **My child needs to use the Internet to be socially accepted**
C2.260	F. **I would like my child's Internet use to decrease**
	1 1 Strongly disagree 2 2 3 3 Neutral, no opinion 4 4 5 5 Strongly agree 7 Don't know 9 Refused
(ADULT ONLY)	
	I'd now like to read you several statements about the Internet. Using a scale of 1 to 5 where '1' means "Strongly disagree," '5' means "Strongly agree," and '3' means "Neutral or no opinion," please tell me whether you agree or disagree with the following: [READ; DO NOT RANDOMIZE]
C2.255Y1	A. **My use of the Internet takes me away from other important activities**
C2.256Y1	B. **My use of the Internet takes me away from time with friends and family**
C2.257Y1	C. **Since I have been using the Internet, I watch less television**
C2.258Y1	D. **I am concerned about communicating with unknown or unwelcome other persons while online**
C2.259Y1	E. **I need to use the Internet to be socially accepted**
C2.260Y1	F. **I would like my Internet use to decrease**
	1 1 Strongly disagree 2 2 3 3 Neutral, no opinion 4 4 5 5 Strongly agree 7 Don't know 9 Refused
(YOUTH ONLY)	
	To complement this study, we are also interviewing young Canadians between the ages of 12 and 17. With your permission, would we be able to also interview your child? [IF YES, ASK: IF NO, CONTINUE] **May I ask the child's name who we will later interview?** [RECORD NAME OF YOUTH: _____]

	DEMOGRAPHICS **We have just about finished the survey. I now need to ask you a few questions for classification purposes in order to place you in an appropriate group for our study. Remember, the results of this survey are confidential and for academic purposes only.**
C2.261 (CQ26)	C2.261. (C1.163R/CQ26) **What year were you born?** _ _ _ _ [ENTER YEAR] 7 7 7 7 Don't know 9 9 9 9 Refused
C2.262 (CQ25)	C2.262. (C1.164/CQ25) [NOTE GENDER] 1 Male 2 Female 7 Don't know 9 Refused
C2.263 (YOUTH AUTO-CODED) (CQ27R)	C2.263. (C1.171R/CQ27R) **What is the highest level of education you have completed?** [DO NOT READ; PROBE IF NECESSARY] 1 Elementary school or lower (CQ27PT-1) 2 Some high school (CQ27PT-2) 3 High school/vocational school graduate (CQ27PT-3) 4 Some college training or certificate (CQ27PT-3) 5 Some vocational/professional training (CQ27PT-3) 6 Attending/attended CEGEP (CQ27PT-3) 7 Attending/attended college (CQ27PT-3) 8 CEGEP graduate (CQ27PT-3) 9 College graduate (CQ27PT-3) 10 Attending/attended university (CQ27PT-4) 11 University certificate or diploma below Bachelor level (CQ27PT-4) 12 Bachelor's degree (CQ27PT-5) 13 University certificate or diploma above Bachelor level (CQ27PT-5) 14 Master's degree (CQ27PT-5) 15 Doctorate (CQ27PT-5) 16 Professional Degree (Medicine/Dentistry/Veterinary/Optometry) (CQ27PT-5) 76 Other [SPECIFY] _____ 77 Don't know 99 Refused
C2.264	C2.264. (C1.172R) **What is your main occupation?** [DO NOT READ] 1 Professional 2 Administrator or owner of a large business

	3 Technician, semi-professional 4 Administrator or owner of a small business 5 Officer worker (white collar), services, sales 6 Tradesman, skilled, semi-skilled worker or blue collar 7 Unskilled worker 8 Farmer or fisherman 9 Homemaker [AUTO-CODE FROM C2.007-3] 10 Student [AUTO-CODE FROM C2.006/C2.008-2] 76 Other [SPECIFY] _____ 77 Don't know 99 Refused [IF C2.002 = 2,7 OR 9 AND C2.004 = 2,7 OR 9, THEN SKIP C2.264]
C2.265 (CQ29AR)	C2.265. (C1.173R/CQ29AR) **What is your marital status?** [READ ONLY IF NECESSARY] 1 Single (C1.173PT-6) 2 Married (C1.173PT-1) 3 Living with a partner (C1.173PT-2) 4 Separated (C1.173PT-4/CQ29APT-4) 5 Divorced (C1.173PT-5/CQ29APT-4) 6 Widowed (C1.173PT-3/CQ29APT-5) 7 Don't know 9 Refused
C2.266 (CQ28R)	C2.266. (C1.174R/CQ28R) **Again, for classification purposes only, we need to know the combined total income for all members of your household before taxes.** $ _ _ _,_ _ _ [ENTER AMOUNT] 7 7 7,7 7 7 Don't know 9 9 9,9 9 9 Refused [+1 IF ≠ 777777 OR 999999]
   C2.267 (ADULT ONLY) C2.268	(C1.174R/CQ28APPENDIX1) **I cannot stress enough how important your response to this question is. Perhaps if I read a list of income ranges, could you stop me when I reach your total household income level before taxes?** C2.267. (C1.174R/Q1310a) **Is your combined household income <u>under $50,000</u> per year?** 1 Yes 2 No [SKIP TO C2.269] 7 Don't know [SKIP TO C2.276] 9 Refused [SKIP TO C2.276] C2.268 (C1.174R/CQ1310aa) **Please stop me when I reach the correct income category. Is your combined household income…?**

	1 **0 to under 10,000** [SKIP TO C2.276] 2 **10,000 to under 15,000** [SKIP TO C2.276] 3 **15,000 to under 20,000** [SKIP TO C2.276] 4 **20,000 to under 30,000** [SKIP TO C2.276] 5 **30,000 to under 40,000** [SKIP TO C2.276] 6 **40,000 to under 50,000** [SKIP TO C2.276]
(ADULT ONLY)	7 Don't know [SKIP TO C2.276] 9 Refused [SKIP TO C2.276]
C2.269	C2.269. (C1.174R/CQ1310b) **Is your combined household income <u>under $100,000</u> per year?**
	1 Yes 2 No [SKIP TO C2.271]
(ADULT ONLY)	7 Don't know [SKIP TO C2.276] 9 Refused [SKIP TO C2.276]
C2.270	C2.270. (C1.174R/Q1310bb) **Please stop me when I reach the correct income category. Is your combined household income…?**
	1 **50,000 to under 60,000** [SKIP TO C2.276] 2 **60,000 to under 70,000** [SKIP TO C2.276] 3 **70,000 to under 80,000** [SKIP TO C2.276] 4 **80,000 to under 90,000** [SKIP TO C2.276] 5 **90,000 to under 100,000** [SKIP TO C2.276]
(ADULT ONLY)	7 Don't know [SKIP TO C2.276] 9 Refused [SKIP TO C2.276]
C2.271	C2.271. (C1.174R/Q1310c) **Is your combined household income <u>under $150,000</u> per year?**
	1 Yes 2 No [SKIP TO C2.273]
(ADULT ONLY)	7 Don't know [SKIP TO C2.276] 9 Refused [SKIP TO C2.276]
C2.272	C2.272. (C1.174R/Q1310cc) **Please stop me when I reach the correct income category. Is your combined household income…?**
	1 **100,000 to under 110,000** [SKIP TO C2.276] 2 **110,000 to under 120,000** [SKIP TO C2.276] 3 **120,000 to under 130,000** [SKIP TO C2.276] 4 **130,000 to under 140,000** [SKIP TO C2.276] 5 **140,000 to under 150,000** [SKIP TO C2.276]
(ADULT ONLY)	7 Don't know [SKIP TO C2.276] 9 Refused [SKIP TO C2.276]
C2.273	C2.273. (C1.174R/Q1310d) **Is your combined household income <u>under $200,000</u> per year?**
	1 Yes 2 No [SKIP TO C2.275] 7 Don't know [SKIP TO C2.276] 9 Refused [SKIP TO C2.276]
C2.274	C2.274. (C1.174RQ1310dd) **Please stop me when I reach the correct income category. Is your combined household income…?**

(ADULT ONLY)	1 **150,000 to under 160,000** [SKIP TO C2.276] 2 **160,000 to under 170,000** [SKIP TO C2.276] 3 **170,000 to under 180,000** [SKIP TO C2.276] 4 **180,000 to under 190,000** [SKIP TO C2.276] 5 **190,000 to under 200,000** [SKIP TO C2.276] 7 Don't know [SKIP TO C2.276] 9 Refused [SKIP TO C2.276]
C2.275 (ADULT ONLY) (CQ28)	C2.275. (C1.174R/Q1310e) [NOTE IF COMBINED HOUSEHOLD INCOME IS $200,000 OR MORE PER YEAR] 1 Yes 2 No 7 Don't know 9 Refused
C2.276	C2.276. (C1.175) **Were you born in Canada?** 1 Yes 2 No 7 Don't know 9 Refused
C2.277 (ADULT ONLY)	C2.277. (C1.176R) **In what year did you come to Canada to stay?** _ _ _ _ [ENTER YEAR] 7 7 7 7 Don't know 9 9 9 9 Refused
C2.278 C2.279 C2.280 (ADULT ONLY)	**Do you consider yourself to belong to any of the following groups?** [RECORD UP TO 3 MENTIONS] [READ] A. **Aboriginal person** (C1.177R-1) B. **Person with a disability** (C1.177R-2) C. **Specific ethnic group** (C1.77R-3) 1 Yes 2 No 7 Don't know 9 Refused [+1 IF C2.280 = 2,7 OR 9]
C2.281	C2.281. (C1.178) **Which ethnic group?** _____ [SPECIFY]

(ADULT ONLY)	7 7 Don't know 9 9 Refused
C2.282	C2.282. (C1.179R) Record region: 1 British Columbia 2 Alberta 3 Prairie Provinces [Saskatchewan, Manitoba] 4 Ontario 5 Quebec 6 Atlantic Provinces [New Brunswick, Nova Scotia, Newfoundland, Prince Edward Island]
C2.283	C2.283. (C1.180) Record province: 1 British Columbia 2 Alberta 3 Saskatchewan 4 Manitoba 5 Ontario 6 Quebec 7 New Brunswick 8 Nova Scotia 9 Prince Edward Island 10 Newfoundland and Labrador
C2.284	C2.284. (C1.181R) Record community size: 1 1 million+ 2 500,000 to 999,999 3 100,000 to 499,999 4 5,000 to 99,999 5 Less than 5,000
	CONCLUSION [FOR NEW RESPONDENTS] **That completes our survey. Thank you very much for all your responses and for your patience. Our study looks and trends so we interview people every few years. We are hoping that you might be interested in participating in another similar survey in two or three years to see if anything has changed? Can we call you back then?** 1 Yes 2 No 3 Maybe 7 Don't know 9 Refused

[IF 'NO' OR 'MAYBE,' PROMPT WITH **"Would you consider participating if we were able to pay you for your time with a modest financial incentive?"**]

[SAY ONLY IF RESPONDENT ASKS THE AMOUNT: **"approximately $10–20"**]

[IF YES SAY]
In order to accomplish this, do we have your permission to maintain your name and phone number on behalf of the Canadian Internet Project for our next study? Once again, this will be kept strictly confidential and used only to call you and follow-up with questions for this particular study: Is that OK?

[RECORD CONSENT OR DENIAL]

[ONLY IF ASKED]

Our research project has been reviewed and approved by York University's Human Participants Review Committee for its compliance with the research ethic policies of the University. If you require further information, please contact Professor Charles Zamaria at 416 979-5107 or the HPRC office at 416 736-5914.

[FOR RESPONDENTS WHO PARTICIPATED IN THE PREVIOUS SURVEY (2004)]

That completes our survey. Thank you very much for all your responses and for your patience. As you know, our study looks and trends so we interview people every few years. Having participated in the 2004 study, your responses are part of a very important panel that we hope to continue to track. We are hoping you might be interested in participating again in a similar survey in two or three years to see if anything has changed. Can we call you back then?

1 Yes
2 No
3 Maybe

7 Don't know
9 Refused

[IF 'NO' OR 'MAYBE,' PROMPT WITH]
Would you consider participating if we were able to pay you for your time with a modest financial incentive?

[SAY ONLY IF RESPONDENT ASKS THE AMOUNT: **"approximately $10–20"**]

[IF YES SAY]
In order to accomplish this, do we have your permission to maintain your name and phone number on behalf of the Canadian Internet Project for our next study? Once again, this will be kept strictly confidential and used only to call you and follow-up with questions for this particular study: Is that OK?

[RECORD CONSENT OR DENIAL]

[ONLY IF ASKED]
Our research project has been reviewed and approved by York University's Human Participants Review Committee for its compliance with the research ethic policies of the

University. If you require further information, please contact Professor Charles Zamaria at 416 979-5107 or the HPRC office at 416 736-5914.

CONSENT AND ASSENT FOR INTERVIEW WITH YOUTH IN HOUSEHOLD
[REQUEST TO INTERVIEW YOUTH IN HOUSEHOLD (12–17 years old)]

[INTRODUCTION; FOR ADULTS WHO WERE RESPONDENTS OF CIP2/2007 STUDY]

In our survey, you also answered questions about your child's use of the Internet. Are you a parent of the teenager we were speaking about earlier?

[IF NO]
Thank very much for answering our questions.

[IF YES]
With your permission, we would like to conduct a similar shorter interview with your child as well. As we all know, young people are often very knowledgeable about new technologies and it is important that we get their opinion.

We will be asking only those questions appropriate for a teenager. You are welcome to monitor the interview. The survey will take about 20–30 minutes and, if you qualify, in appreciation of your time you will be entered into a draw along with the other participants for a chance to win a Nintendo Wii – you have a 1 in 400 chance of winning. All answers are strictly confidential, and we are not selling anything.

May we ask your permission to conduct this interview? It is very important to our study and again, all responses are confidential.

[IF YES]
May I speak with him/her now?

CHILD SELECTION

[IF ONLY ONE YOUTH 12–17, SELECT; IF SEVERAL, SELECT THE ONE WHO WILL BE THE NEXT TO CELEBRATE HIS/HER BIRTHDAY]
[TO BE ASKED ONLY OF THOSE ANSWERING WITH RESPECT TO A CHILD IN THE HOUSEHOLD, AGED 12–17]

[IF NO OR IF NOT AVAILABLE]
What would be a convenient time for me to call back?

[ONLY IF ASKED]
You may choose not to answer a particular question or terminate the interview at any time. Depending on some of your responses, the time to complete the survey will take between 15 and 25 minutes.

[ONLY IF ASKED]
Our research project has been reviewed and approved by York University's Human Participants Review Committee for its compliance with the research ethic policies of the University. If you require further information, please contact Professor Charles Zamaria at 416 979-5107 or the HPRC office at 416 736-5914.

[FOR THE YOUTH RESPONDENT]
Hello, my name is _____ and I'm calling on behalf of Ryerson and York Universities. We are conducting an academic survey about media use in Canada and your father/mother has given us permission to ask you some questions. The survey will take about 20-30 minutes and, if you qualify, in appreciation of your time you will be entered into a draw along with the other participants for a chance to win a Nintendo Wii – you have a 1 in 400 chance of winning.

Please be assured that we are not selling or soliciting anything. Your answers will be kept strictly confidential, and we are not selling anything.

May we ask your permission to conduct this interview? It is very important to our study and again, all responses are confidential.

[IF YES, GO TO YOUTH QUESTIONNAIRE; GO TO C2.001 IN PN 5363]

[IF HESITANT OR DOES NOT HAVE THE TIME RIGHT NOW]
May I call you back at a more convenient time? Once again, your phone number was selected randomly and in order to ensure the statistical relevance of our study, it is very important that we get responses specifically from you.

[IF YES, RECORD TIME AND DATE]

[ONLY IF ASKED]
Depending on some of your responses, the time to complete the survey will be between 15 and 25 minutes.

[ONLY IF ASKED]
Our research project has been reviewed and approved by York University's Human Participants Review Committee for its compliance with the research ethic policies of the University. If you require further information, please contact Professor Charles Zamaria at 416 979-5107 or the HRPC office at 416 736-5914.

*** END ***