



2011 Special Feature Reports

The Ipsos Canadian **Inter@ctive Reid Report**



Ipsos Reid

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Since 1995, the Ipsos Canadian Inter@ctive Reid Report has been monitoring Canadian Internet behaviours and attitudes to provide subscribers with the most authoritative, comprehensive, and up-to-date information available on Canadians and the Internet. Our study is not simple measurement figures. Rather, it is the 'who, what, why, where, when and how' of Canadians and the Internet. Whether you are in the high-tech sector, a traditional consumer company, or a social marketer, the information provided in this report will keep you up-to date on what Canadians are doing online and why.

2011 Special Feature Chapter Reports

We are now offering individual chapters from the 2011 report for purchase. New for 2011, we have added chapters which focus on hot, breaking topics like Wikileaks, Social Media and the Federal Election, and other new digital developments. Here is a list of the chapters from the 2011 reports that are now available for purchase:

Breaking Issues Topic: Wikileaks (May 2011) \$1,000

Consumer Electronics (May 2011) \$1,000

Online Financial Services (May 2011) \$1,000

Smartphones (May 2011) \$1,000

Breaking Issues Topic: Social Media and the 2011 Federal Election (June 2011) \$1,000

Online Social Networking (June 2011) \$1,500

Tablet Computers (June 2011) \$1,000

QR Codes (August 2011) \$1,000

Online News (August 2011) \$1,500

Breaking Issues Topic: Online Group Coupons (August 2011) \$1,000

Digital Marketing (August 2011) \$1,000

Online Charitable Giving (August 2011) \$1,000

ISP Satisfaction and Internet Issues (August 2011) \$1,000

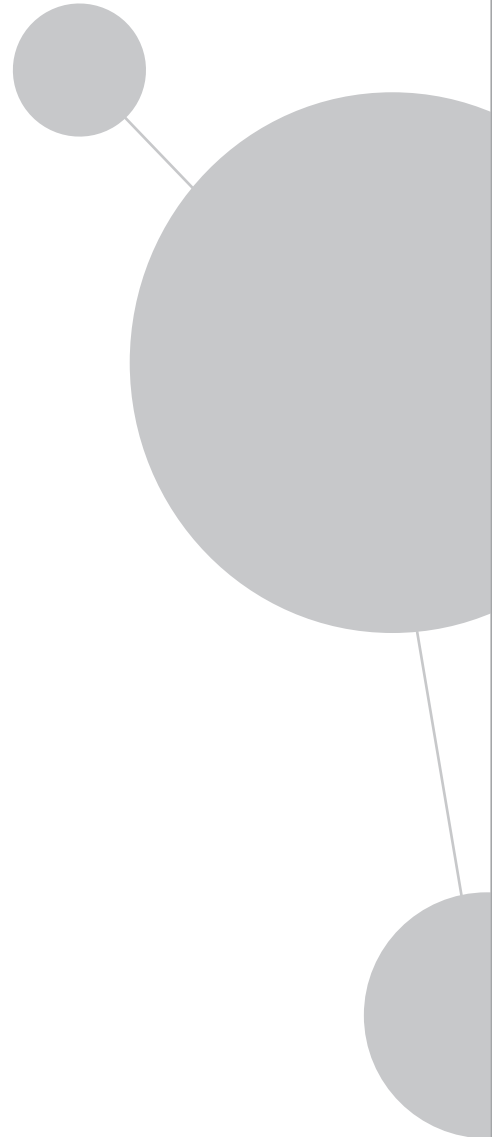
Breaking Issues Topic: Cloud Computing (November 2011) \$1,000

Digital Photography (November 2011) \$1,000

Online Teens (December 2011) \$1,500

Consumer Electronics (January 2012) \$1,500

Holiday Ecommerce (January 2012) \$1,000



Wikileaks

Among the hundreds of thousands of leaked documents posted on the site, thousands mention Canada – some of which are thought to have the potential to harm Canada's relationships with foreign governments. As the debate over issues of transparency, security and the responsibilities of the media continues, Canadians weigh in on the controversial website. Topics covered in this chapter include:

- Awareness of and experience with Wikileaks website
- Opinion of Wikileaks

Consumer Electronics

It is a challenge to keep up with the ever changing landscape of consumer electronics. Tablet computers, eReaders, 3D televisions, Bluetooth wireless headsets, motion capture video games – many of these consumer electronics seemed like something from “The Jetsons” even a few years ago. This chapter provides a snapshot of what Canadians have in their homes today and what they will have tomorrow. Topics covered in this chapter include current ownership and future purchase intention of:

- Tablet, laptop and desktop computers and accessories
- Smartphones, cellular phones and GPS devices
- Stereo systems, satellite radio, MP3 players and accessories
- Televisions, media players and gaming consoles
- Cameras and video recorders

Online Financial Services

Online Canadians use the Internet for a plethora of financial services, from everyday transactions such as checking statements and paying bills – to opening new accounts and managing entire financial portfolios. As ever improving mobile technology allows Canadians to multi task on the go, we are likely to see more financial activity move online. Online financial service companies, marketers and payment processors need to know what the changing landscape of the online financial services environment looks like in order to maximize their user experience and sales. Topics covered in this chapter include:

- Online banking, investing and trading behavior and opinions
- Electronic financial statements and notifications
- Bill payments and Interac e-Transfers

Smartphones

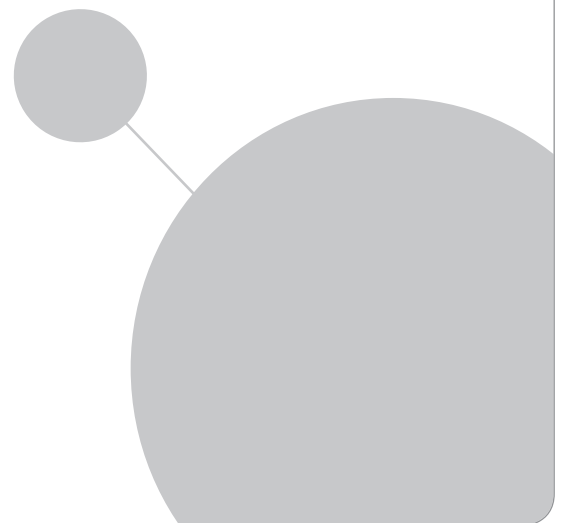
Three-in-ten online Canadians now own a Smartphone. As ownership continues to grow, and businesses create more ways for their customers to interact with them using smartphones, these devices have the potential to surpass even the personal computer in terms of their integration into our everyday lives. Topics covered in this chapter include:

- Smartphone ownership and behavior
- Market share
- Use of applications

Social Media and the 2011 Federal Election

With politicians, reporters and pundits all tweeting about their daily activity and their minute-by-minute views on the latest election happenings, throughout the 2011 federal election there was much speculation and several pronouncements that this was Canada's first national social media election. This special feature report investigates this idea and the role of social media throughout the 2011 federal election. Topics covered in this chapter include:

- Social networking and news media sites used for political discussions
- Levels of online engagement
- Relationship between online engagement and political affiliation
- Importance of election information sources



Online Social Networking

A majority of online Canadians now use social networking sites, with many visiting these sites daily. While Facebook remains the dominant social network, the growth of Twitter and professional social networking sites such as LinkedIn are changing the face of how Canadians communicate online. With social networking sites poised to become a vital part of the marketing communications mix, businesses need to know what consumers are doing on these sites and how they can best utilize this addition to their marketing toolbox. Topics covered in this chapter include:

- Social networking behavior
- Experience with and attitudes towards social networking marketing communications
- Use of professional social networking sites
- Participation in online social activities

Tablet Computers

With all the attention paid to tablet computers, it's hard to believe that the Apple iPad, the first breakthrough tablet computer, has only been on the market for such a short period of time. Although Canadian ownership of tablet computers is still low, purchase intention shows that the category is likely to see strong continued growth over the next year. Offerings from new competitors in this market are set to stimulate this growth and provide a diversity of tablet options. Topics covered in this chapter include:

- Tablet ownership
- Brand awareness
- Purchase intention

QR Codes

QR or Quick Response codes were originally designed to track shipments; today they are used to store all kinds of information, to direct users to websites or send emails, and even to make purchases. These odd-looking black squares are being noticed by many Canadians as they are increasingly used in a wide variety of applications including marketing and advertising campaigns. As the smartphone market continues to grow, the utility of QR codes is potentially limitless. Topics covered in this chapter include:

- QR code awareness
- Use of QR codes
- Frequency of use

Online News

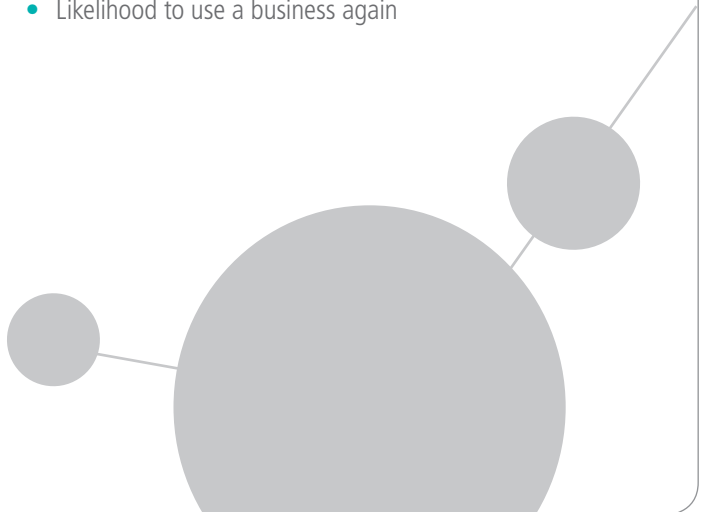
99% of online Canadians regularly access news in one form or another – sources vary depending on who they are, and what type of information they are looking for. Offline sources (television in particular) are still the predominant news source for the majority of Canadians, but younger Canadians are more likely to say their computer is their primary news source. As more and more Canadians upgrade to smartphones and tablet usage begins to rise, we may see increases in the trend of switching paid paper subscriptions for free online news. Topics covered in this chapter include:

- Frequency of use and sources of news
- Engagement with online news activities
- Allocation of time across various news sources
- News-related social networking activities
- Sources used for different news types (i.e., national vs. international news, etc.)

Online Group Coupons

Online group coupons are one of the largest marketing trends to have hit the Internet in the past few years. One of the most appealing aspects of online group coupon sites is their ability to attract the interest of consumers who are not typical coupon users. Online group coupons have revolutionized a traditional promotional tool and have managed to escape much of the negative stigma associated with couponing. With one third of online Canadians having purchased one of these deals, online group coupons are one area of promotion that Canadian businesses and marketers cannot ignore. Topics covered in this chapter include:

- Awareness and subscription to online group coupon sites
- Categories purchased (i.e., restaurant, travel, personal care, etc.)
- Frequency of online group coupons activity
- Likelihood to use a business again



Digital Marketing

Social media as a channel continues to be a major area of digital marketing growth. With an unmatched capacity to zero in on specific demographics, social media is becoming a powerful tool for marketers to reach and engage their target audience. New trends are developing such as a greater focus on the importance of mobile devices in digital marketing. The growing adoption of mobile devices in Canada gives marketers increased opportunities to directly access their core markets. Topics covered in this chapter include:

- Preferred methods and frequency of contact from organizations
- Organizations with the most memorable communications
- Frequency of exposure and engagement with digital marketing activities

Online Charitable Giving

Despite the ongoing global economic crisis and its affect on spending, the proportion of Canadians who have made financial donations has actually increased since 2009. While more Canadians are donating, they are contributing smaller amounts than in the past and giving to a broader range of charities. The Internet and social media have opened up new methods of reaching out to donors and organizing fundraising events. Many fundraising organizations now have an online presence and preference to donate online is growing. Topics covered in this chapter include:

- Methods of donating to support charities and non-profit organizations
- Types of charities supported
- Reasons for a first time charitable donation
- Online financial donations

ISP Satisfaction and Internet Issues

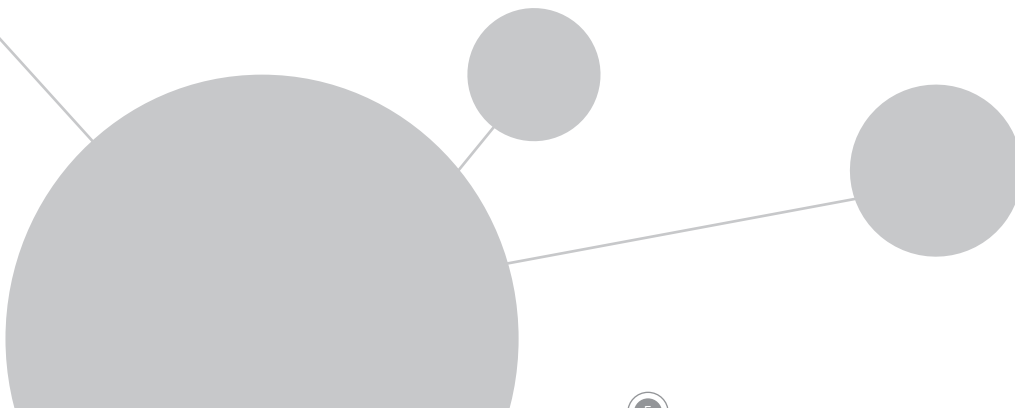
The ISP Satisfaction and Internet Issues feature returns again, evaluating online Canadians' satisfaction with their Internet service provider. Satisfaction has slid 9 percentage points since last year – clearly indicating a growing dissatisfaction with providers. The large scale public backlash to proposed Usage Based Billing (UBB) legislation tabled by the Canadian Radio Television Communications Commission (CRTC) in early 2011 likely contributed to this slide in satisfaction. Topics covered in this chapter include:

- Internet service provider and satisfaction
- Plans for upgrading modem speed
- Data plans for mobile internet devices and satisfaction with provider

Cloud Computing

This special feature explores the views and adoption of cloud computing among Canadian Internet users. Cloud computing is growing in popularity and is currently most popular among young men and younger online Canadians – two groups that tend to be the early adopters of new technology. Mainstream cloud computing solutions such as Apple's iCloud may see these segments' enthusiasm for cloud computing translate to the general population in years to come. Topics covered in this chapter include:

- Awareness, familiarity, and use of cloud computing
- Awareness of different platforms offering cloud capabilities
- Areas of concern and security



Digital Photography

Digital cameras are a near universal staple of the online Canadian household, with many now upgrading their compact point and- shoot digital cameras to DSLRs. Improved cameras built into mobile phones and the increased smartphone market share has boosted use. The growth in online social networking has been another major catalyst in the use digital photography. Social networking sites and other online photo sharing sites like Flickr and Tumblr give online Canadians a quick and easy way of sharing their digital pictures with family and friends. Topics covered in this chapter include:

- Ownership and purchase intent
- Camera quality affect on mobile phone purchase
- Frequency of use
- Digital photography and social networking

Online Teens

Canadian teens today are growing up in a unique atmosphere with access to more technologies, information and media than any generation before them. Teens are embracing the spirit of the time in technological innovation. The amount of time they spend online has increased significantly even in the past few years, and more teens than ever before are interested in having careers in technology. Increasingly influential and driven to keep up with new technologies, Canadian teens are a prime target for marketers. Topics covered in this chapter include:

- Attitudes towards technology and the Internet in general
- Technology in the classroom
- Social networking
- Music, video games, and other media

Consumer Electronics

New consumer electronics are converging around technologies that were previously exclusive of one another, such as the Internet and television. IP-based television services are available that can be delivered not only to TVs, but also to video game consoles, tablet PCs, and smartphones. Consolidation of features that were previously only available in stand-alone devices (digital cameras, MP3 players and portable videos) is leading consumers to owning fewer devices that do more things – especially smartphones. Topics covered in this chapter include:

- Household electronic purchases and planned upgrades
- On-demand technology
- Tablet and smartphone ownership

Holiday Ecommerce

With consumer confidence down, there was no real growth in online purchases in Canada this past holiday season. However, there was an uptick in the average spending among those buying online – especially those with higher incomes. In keeping with less buying overall, there were decreases in most categories of goods bought online during the holiday season in 2011. Topics covered in this chapter include:

- Online purchases and amount spent
- Items purchased
- Online group coupons as holiday gifts
- Reasons for shopping online

To learn more, please contact:

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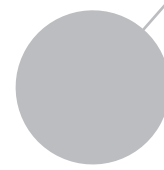
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