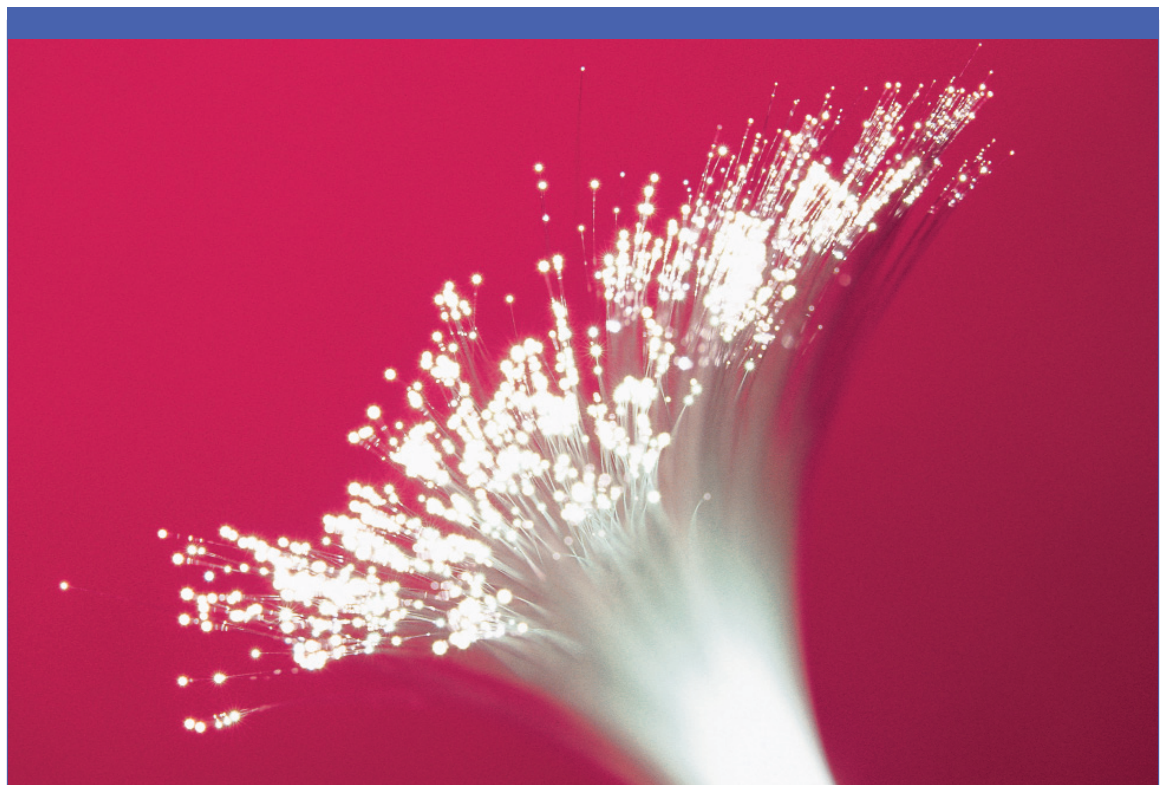




Ipsos Reid

Ipsos Canadian Inter@ctive Reid Report – 2009 Special Features



About The Ipsos Canadian Inter@ctive Reid Report

In its 14th year, the *Ipsos Canadian Inter@ctive Reid Report* was developed by Ipsos Reid to monitor Canadian Internet behaviours and attitudes in order to provide subscribers with the most authoritative, comprehensive and up-to-date information about the Web that is available. 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.

We are now offering individual chapters from the 2009 report for purchase. We have two offers.

Access and Profiles – \$500

Autos and the Internet – \$500

Digital Marketing – \$500

Digital Music – \$500

E-Commerce – \$1,000
(per quarter – available for Q2 and Q4)

E-Government – \$500

Energy and the Internet – \$500

Financial Services – \$1,000
(per quarter – available for Q1 and Q3)

Mobile Apps – \$750

Online Bargain Hunting – \$500

Online Charitable Giving – \$500

Online Education – \$500

Online Gaming – \$500

Online Wellness and Healthcare – \$1,000

Online Housing – \$500

Online Social Networks – \$1,500

Online Sports – \$500

Online Teens – \$1,500

Online Travel – \$500

Online TV/Movies – \$500

Privacy and Security – \$500

Search Marketing – \$500

VoIP – \$500

About Access and Profiles

This chapter features a detailed demographic profile of online Canadians, giving subscribers a clear understanding of who is online in Canada and adding valuable context to the results of the research. This snapshot of our Access and Profiles section will give you a clear understanding of who online Canadians are by looking at the demographic breakdown of the Internet population by age, income, gender, region, household type, and Internet skill level. Topics covered in this chapter include:

- Internet penetration
- Internet access speed
- Self-reported internet skill level
- Interest in modem/speed upgrading
- ISP satisfaction
- Weekly time spent online
- Online activities ever done
- Past 12 month online activities
- Frequency of online activities
- Frequency of visiting certain types of websites
- Percent of weekly time spent at certain websites
- Percent of weekly Internet time from specific locations

About Autos and the Internet

The automotive industry continues to face significant challenges and change. Most recently, it has been rocked by the bankruptcy filings of General Motors and Chrysler as well as facing lowered consumer confidence and year-over-year drops in sales.

Measuring online Canadians' views on automotive purchase for the first time since 2003, this special report sheds light not only on how Canadians are using the Internet to shop for vehicles, but also how those behaviours have adjusted to changes in the industry and the economy. Topics covered in this chapter include:

- Purchase of vehicle in the past 2 years
- Purchase intent in the next 2 years
- Impact of the Internet on purchase decision
- Searched online for prices, features, financing
- Types of vehicles searched for
- Online vehicle related activities ever done
- Agreement with online auto statements
- Recommend Internet as a source for autos
- Reasons unlikely to recommend the Internet as a source
- Likelihood of searching online for vehicle information in the future
- Reasons unlikely to search for vehicle information online
- Third party auto sites visited

- Frequency of visiting third party websites
- Top 15 manufacturer sites visited
- Vehicle insurance sites visited
- Financial institution sites for information on vehicle financing
- Searched the Internet for non-gasoline vehicles
- Likelihood of purchasing a non-gasoline car in the future
- Interest in Ford/Magna electric car
- Importance of technology in new vehicles
- Frequency of using online maps and online traffic conditions
- Online map sites ever used

About Digital Marketing – What Do Canadians Think of Advertising in the Digital Age

With more Canadians accessing the Internet than ever before and spending increasing amounts of time online, marketers are slowly moving more of their marketing budgets online to reach the desired audiences. In some respects digital marketing is still in the nascent stages. *Interactive Reid* asked online Canadians what they thought of the efforts of digital marketers so far. Topics covered in this chapter include:

- Recall of new and different ways online Canadians have been communicated to
- Recall of which organizations/businesses consumers have received new and different advertising from
- Most memorable communications received by category
- Reason for memorable communications
- Frequency of experiencing/participating in digital communications/advertising
- Conversion rates of new and different ways of communications/advertising
- Frequency of participating in specific communications/advertising activities
- Level of agreement that online ads are based on other pages visited
- Online Canadians impression of online advertising

About Digital Music

Arguably, one of the industries most affected by the Internet era has been the entertainment industry. Technology and piracy have always appeared to be one step ahead of the industry. So much so, that it is starting to become common to know people who no longer have cable television at home. Instead, they watch a few shows a week that they download, or stream, from the Internet. In the current economic environment, there may be more than a few people who decide to cut the cable cord and get the few

shows they watch off air or via the Internet. Furthermore, the traditional music store as we used to know it barely exists. For the first time since Q1–2006, the *Inter@ctive Reid Report* takes an in-depth exploration of the digital music industry. Topics covered in this chapter include:

- Prevalence of music files on home computer
- Number of music files stored on computer
- Prevalence of back-up drives
- Size of back-up drive
- Manufacturer of back-up drive
- Source of music files stored on computer
- Use of illegal peer to peer networks
- Number of files from peer to peer network still on computer
- Percentage of ‘free’ files that eventually get paid for
- Downloading of music videos from Internet
- Usage of fee-based download services
- Prevalence of portable digital music players
- Number of songs on portable digital music player
- Portable digital music manufacturer
- Storage capacity of portable digital music player
- Attitudes about digital music players
- Attitudes about file sharing and content restrictions
- Prevalence of online radio
- Geographic location of online radio station

About E-Commerce

E-Commerce has come a long way in the last 15 years. The fact is, Canadians are spending billions of dollars online annually. As they become more experienced with the Internet they also become more sophisticated consumers, knowing how to comparison shop and find the best deals. In an increasingly competitive marketplace, online marketers, retailers, and payment processors need to understand the changing landscape of the online retail environment, in order to maximize their user experience and sales. Topics covered in this chapter include:

- Prevalence of past 12 months’ online purchases
- Amount spent online in the past 12 months
- Amount spent online in the past 12 months, excluding travel
- Amount spent online in the past three months
- Internet web site of last purchase
- Payment methods
- Satisfaction with most recent shopping experience
- Items ever purchased online
- Last three month purchases
- Use of the Internet as research tool for online shopping

- Attitudes toward online shopping
- Weekly time spent online browsing/shopping
- Prevalence of E-flyers
- Main reason for not purchasing anything online
- Likelihood of purchasing online in the future
- Online coupons usage (Q2 only)
- Delivery method of online coupons (Q2 only)
- Past 6 month usage of online coupons
- Amount saved from online coupons
- Online coupon shopping category interest
- Interest in receiving coupons on mobile devices
- Interest in receiving coupons on mobile devices while in-store
- Interest in buying online and picking up in-store
- Tools used to save money while shopping online
- Frequency of using tools to save money while shopping online
- Use of store reviews before buying
- Use of product reviews before spending more than \$100
- Use of product reviews when spending \$20 online
- Believability of online consumer product reviews
- Online garage sales
- Prevalence of signing up for online samples
- Frequency of signing up to receive online samples
- Consumer opinion of economic conditions in Canada in next 12 months
- Consumer opinion of personal finances in next 12 months
- Consumer opinion of the timing of global economic improvements

About E-Government

These are challenging times. Not only for the people, but also with those charged to design and implement policy. In December 2008, President Obama announced that he would lead America into the digital economy. He announced a series of steps that would help America into this new economy with government stimulus spending in technology. This spending would mean new computers for schools, expanded broadband access, particularly in rural areas, and funding on technologies to reduce medical costs. Networking technologies to support services such as telemedicine could also benefit. So, for the first time since Q3-2001, *Inter@ctive Reid* decided to look at how online Canadians viewed various levels of Canadian government and their online presence. This section includes looking at the past and future Internet needs of online Canadians from government, likelihood of voting and participating in referendums online, attitudes toward government online and reaction to President Obama's use of social media. Topics covered in this chapter include:

- Frequency of visiting Government websites
- Future visitation potential among non-visitors
- Awareness and visitation of the Government of Canada's main website
- Current and future potential of online Government activities
- Likelihood to vote or participate in referendums online
- Activities Online Canadians would like to do at Government websites
- Concern with the security and reliability of Government transactions
- Attitudes and opinions toward Government online
- Speed of Government adoption of online services
- Reaction to Government websites
- Effect of the Internet on national security
- E-Government activities ever done
- Obama's use of Social Media

About Energy and the Internet

There are big changes underway in how consumers view and monitor their electricity usage at home. There are also big changes in how utilities monitor the electricity transmission system and the interactive services that they provide to their customers. Many companies now provide interactive account management tools, not only designed for billing, but also to provide energy efficiency and conservation information. Terms like Smart Meters, Demand Response Management, and Smart Grids will become increasingly more prominent in years to come. Topics covered in this chapter include:

- Awareness of Smart Meters
- Interest in Smart Meters
- Prospective frequency of viewing energy usage online
- Type of company that should provide customers with interactive Smart Meter software
- Reasons for company selection
- Privacy concerns with access to household energy consumption
- Most trusted type of company to handle energy consumption habits
- Awareness of Microsoft Hohm and Google PowerMeter
- Purchase interest in Hohm and PowerMeter
- Importance of upgrading to Smart Grid technology (after reading description)
- Infrastructure projects that are more important than a Smart Grid
- Awareness of Demand Response technology
- Interest in Demand Response technology

- Level of agreement: environmental and energy policy and inseparable
- Awareness and knowledge of Broadband over Powerline (BPL)
- Likelihood to switch from current ISP to BPL
- Main reasons for and against Switching to BPL

About Financial Services

Some Canadians haven't been into a 'bricks and mortar' bank in years. Some of these online Canadians probably wonder why the banks in their traditional format even exist. While in the past, many consumers feared the consequences of exposing their financial information online, financial institutions have worked to build their trust through millions of dollars in security and infrastructure, to make online banking a risk-free experience. What do online Canadians think of their experience in 2009? 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:

- Financial activities conducted online in the past 3 months
- Financial institutions used for conducting online transactions
- Primary institution for online banking
- Frequency of visits to primary online banking institution
- Overall satisfaction with online banking institution
- Customer satisfaction attributes for primary online banking institution
- Number of bills paid online each month
- Type of bills paid online
- Financial institution used for purchasing stocks and other investments
- Primary financial institution for online investing
- Frequency of visiting primary online investment site
- Overall satisfaction with primary online investment site
- Number of trades made in last 30/90/180 days
- Confidence that the financial services industry can ensure the security and privacy of electronic transfers
- Use of financial institution web sites for financial advice
- Use of non-financial institution web sites for financial advice
- Preferred non-financial institution web sites for financial advice
- Information sought on non-financial institution web sites
- Frequency of using financial information websites

- Downloaded podcast or watched online video about financial services
- Interest in watching podcasts or online videos about financial services
- Ideal length of financial services/information podcast
- Awareness of Tax Free Savings Accounts
- Likelihood to start a Tax Free Savings Account
- Searched for insurance related information
- Specific areas of insurance company websites searching for
- Use of online money transfers
- Confidence in the privacy and security of electronic transfers
- Consumer opinion of economic conditions in Canada in next 12 months
- Consumer opinion of personal finances in next 12 months
- Consumer opinion of the timing of global economic improvements

About Mobile Apps

Coming in Q4 – contact Ipsos Reid for a list of proposed topics.

About Online Bargain Hunting

eBay has been a tremendous Internet success story. In some respects its success has been different than other companies because it doesn't actually sell anything. Rather, it is a platform to allow others to conduct business. In addition to eBay's achievement, there are numerous stories on the Internet about how people use the site as their primary source of income, some with considerable success. The world of sites like eBay has also opened up a world of opportunity for collectors of memorabilia. Big business has also moved onto sites such as eBay, using the medium to sell off excess stock or simply to create an additional sales channel. eBay is #22 in the list of most visited global websites (and #23 in Canada as well). On average, each user spends 13.5 minutes per day at the site. A unique Canadian spin on the online used/collectible/classified (hereinafter 'used') website is Kijiji. As much of North America is currently in a recession, the time would seem to be right for more consumers to be shopping at used websites. *Inter@ctive Reid* decided to have our first ever look at how online Canadians have, and are, using used websites. Topics covered in this chapter:

- Websites aware of for used products, collectible items and classified ads
- Aided Awareness of websites aware for used products, collectible items and classified ads
- Frequency of visitation of used websites
- Recommend ratings for used websites

- Items searched for on used websites
- Past purchase at a used website
- Past 12 month purchases at a used website
- Ever sold anything at a used website
- Frequency of sales in the past 12 months at a used website
- Preferred method of purchasing: auction style vs. fixed price
- Attitudinal statements about used websites
- Have auction style purchases intentionally been bid up
- Transactional problems experienced with used websites
- Amount of un-refunded purchases
- Preferred payment method at used websites
- Are user feedback scores manipulated?
- Prevalence of purchasing insurance at used websites

About Online Charitable Giving

On the international stage, Canada has long been regarded as one of the more charitable nations and our most recent research with online Canadians seems to support this claim. Still, as many organizations across a vast array of industries begin to move more of their presence online, this transition does not necessarily represent a major step forward from a fundraising perspective. Topics covered in this chapter:

- Methods of giving in the past 12 months
- Types of charities supported in the past 12 months
- Location of charities supported
- Frequency of donation activities in the past year
- Amount donated in the past year
- Method used to make direct financial donation
- Interest in making a financial donation online
- Reasons for not making financial donation online
- Impact of having online donation channel on the frequency of donations
- Impact of having online donation channel on the amount of donations
- Donated to a new charity in the past 12 months
- Reason for donation to new charity
- Frequency of visitation to the a social network site of a charity

About Online Education

Traditional classroom education isn't going anywhere. Just over half of online Canadians still prefer in-person education to online classes. That said, half of those who have either searched for or taken online or in-person education courses would recommend taking education courses via the Internet. The types of courses taken online seem to be complementary

to traditional learning and professional development courses are the most prevalent. The ways in which students are interacting with online material suggests that online education is not a core component to their learning but rather a supplement or alternative to traditional methods. Topics in this chapter include:

- Education related activities ever done
- Attitudes toward Education
- Types of online courses taken
- Activities undertaken as part of an online course
- Attitudes toward online Education
- Likelihood of recommending online education to others
- Likelihood to use the Internet as a source for Education related information
- Likelihood to taking online courses in the future
- Prevalence of internal employer related training and development
- Internal courses offered

About Online Gaming

There was a time where one of the primary success factors for a website was to put a free game on it. It had the effect of ensuring people would come back again and again. As Canadians hunker down in the recession, they are doing more and more activities at home. By most accounts, television viewership has increased, particularly for major sporting events. One potential area that could have benefited from the rise in activities at home is the online gaming industry, although recent data suggests that this market sector has also been affected by the economic downturn. As a result, this quarter *Inter@ctive Reid* decided to look at the online gaming industry, an industry that is essentially less than 30 years old. The success of this industry is in part due to the success of the Internet, whereby people can play games online against friends/strangers in faraway places. The industry is helping revolutionize the world as we know it today as it is drawing people away from more traditional forms of entertainment such as movies and television. Topics in this chapter include:

- Number of hours spent playing games online weekly
- Who do they play against
- Favourite online games
- Amount spent on video games in past 12 months
- Most recent game purchased
- Location of purchase
- Amount spent on game accessories in past year
- Computer hardware purchased in past 12 months for gaming

- Amount spent on computer hardware for gaming in past 12 months
- Game accessories purchased in past 12 months
- Online gaming related activities
- Game console/ownership
- Attitudes regarding game consoles and games
- Game and mobile phones
- Online gambling

About Online Wellness and Healthcare

Coming in Q4—contact Ipsos Reid for a list of proposed topics.

About Online Housing

As parts of Canada experience record sales, no doubt fuelled in part by low interest rates. *Interactive Reid* finds that online Canadians continue to use online sources for real estate information. A majority are turning to the Internet to view real estate listings that include pictures and videos while others are going online to use tools such as mortgage calculators and even to find a realtor. Topics included in this chapter include:

- Purchased in last 2 years
- Type of dwelling purchased
- Purchase intent – next 2 years
- Ever visited a housing information site
- Advantages of using the Internet as a house-hunting resource
- Disadvantages of using the Internet as a house-hunting resource
- Advantages of using a realtor for house hunting
- Activities done at online housing sites
- Real estate websites ever visited
- Housing related activities as a result of Internet activity
- Attitudes toward online housing
- Role of the Internet in the overall house shopping experience
- Role of the Internet in past 2 year home purchase
- Likelihood of recommending the Internet as a house-hunting resource
- Future use of the Internet as a house hunting resource
- Searched online for housing rental information in past 2 years
- Advantages to using the Internet to search for rental properties
- Disadvantages to using the Internet to search for rental properties
- Rental property websites visited

About Online Social Networks

Online Social Networks have experienced a rapid rise in recent years. In fact, it seems like a day doesn't pass where you read about or hear someone talking about Facebook, MySpace or Twitter. With more and more online Canadians using social networks, many marketers and businesses in Canada are trying to determine how to fit them into their overall media strategy. Even though online social networking is relatively new, it may define a generation of Internet users. In fact, its growth has been to the point where it can probably be no longer considered a 'fad.' Online marketers and businesses need to know what the changing landscape of the online social networking environment looks like in order to maximize their sales and media strategy. Topics covered in this chapter include:

- Participation in online social activities
- Frequency of past month social networking
- Frequency of past month online socialization activities
- Favorite site to chat/meet people
- Frequency of participation in various online social activities
- Importance of Internet on social life
- Importance of online activities in day to day life
- Impact of Internet on social life
- Awareness of online social networks or communities
- Frequency of visiting specific online social networks
- Prevalence of personal profiles
- Sites with profiles on
- Features embedded in personal profiles
- Weekly time spent browsing online social networks
- Number of friends in social network
- Length of time using online social networks
- Reasons for not having a personal profile
- Likelihood of placing a personal profile
- Visitation of online social networks from work
- Prevalence of office social networks
- Reason for office social network
- Use of social networks for professional purposes
- Reason for joining professional social network
- Importance of social networking to your career
- Professional social networking sites used
- Awareness of Twitter
- Use of Twitter
- Maintain a blog
- Purpose of blog
- Blog operators impact

About Online Sports

Coming in Q4—contact Ipsos Reid for a list of proposed topics.

About Online Teens

Like never before, youth of today are digital consumers. They are increasingly online for entertainment purposes and are staying in touch with their friends through electronic means, incorporating the Internet into a wide variety of aspects in their lives. In this Chapter, we reveal insight to help you better understand this emerging group of new consumers. In addition, we look at sociological impact of the high adoption of the Internet by youth of today and what this means for technology acceptance in the future. Topics covered in this chapter include:

- The activities in which Canadian youth are taking part online
- Online shopping behaviours among Canadian teens, as well as an investigation of the barriers to shopping online
- Online Social Networking – how Teens today are employing the Internet to socialize with others and the trend for the future
- The extent to which Canadian youth are using the Internet as a component of their education
- How Canadian youth are using the Internet as an entertainment medium including downloading of MP3 files and playing games online
- The attitudes of Canadian youth towards technology and the implications of this on the future of the Internet and Internet applications in Canada

About Online Travel

The Internet is still the number one source of travel information for online Canadians. The proportion of people purchasing travel online continues to lag behind the proportion that uses the Internet to search for travel information; however, the gap is narrowing. Even though the conversion from search to purchase is increasing, actual travel booked is down this year compared to previous years. Topics in this chapter include;

- Preferred information source used for travel
- Types of trips taken in the past year
- Online activities for each type of trip: researched online vs. purchased online
- Travel elements purchased online
- Impact of online descriptions
- Research vs. purchase
- Role of the Internet in travel planning
- Expectations of the Internet as a travel planning tool
- Expectations of the Internet as a method for booking travel

- Online travel sites visited
- Favourite online travel information site
- Favourite online travel booking site
- Preferred source for purchasing online travel
- Additional travel aspects purchased through airline website
- Use of travel agents
- Advantages of the Internet as a travel resource
- Disadvantages of the Internet as a travel resource
- Agreement with online travel statements
- Usefulness of travel agents
- Online message board impact on travel bookings
- Brand vs. price
- Trust in online descriptions
- Online travel comparison shopping
- Reasons unlikely to purchase next trip online
- 2009 travel expectations
- Travel rewards programs membership
- Price vs. loyalty programs
- Impact of WestJet frequent flyer program

About Online TV/Movies

Coming in Q4—contact Ipsos Reid for a list of proposed topics.

About Privacy and Security

Arguably, the Internet wouldn't be as popular today without some semblance of privacy and security. Given the number of online Canadians banking online, it would be reasonable to draw the conclusion that for many online Canadians privacy and security would be extremely important to them. In fact, whole businesses have emerged in the last couple of decades protecting online users from hacking, viruses and phishing. Given the success of these businesses, there certainly appears to be a business model in protecting online users and the several thousand dollars they have invested in PCs, laptops, associated peripherals and the hundreds of dollars they spend annually for Internet service. However, there also appears to be a change in culture where many do not mind what information is online about them. This quarter of *Inter@ctive Reid* takes another look at how online Canadians view privacy and security for the first time since the first quarter of 2006. There have been many new developments in the world of privacy and security online in the last three years. As part of the new Internet Explorer release (IE8), Microsoft promises to make the Internet experience more secure for Internet users. As the world becomes increasingly digital privacy and security will remain at the forefront of many online users' minds. Without it, the digital world as we know it today would be greatly affected. Topics in this chapter include;



- Level of concern with online security
- Level of concern with online security compared to 1 year ago
- Level of concern with providing personal information
- Level of concern with providing personal information compared to 1 year ago
- Areas of privacy violation
- Ever has credit card unauthorized online
- Amount of unauthorized use
- Who should be responsible for online security
- Importance of InPrivate features
- Agreement with online security statements

About Search Marketing

For some, search marketing has come out of nowhere and become a multi-billion dollar business. During the dot-com crash of 2,000–2,001, advertising based business models were deemed to be insufficient for a business to survive. Fast forward to today and much of that thinking has changed for a handful of companies. Online marketing is a new frontier for many companies and poses a significant challenge to maximize its effectiveness. Use of the search engine has almost become as ubiquitous as email. Ultimately all of the advertising dollars that are spent on the Internet has to generate a return of some fashion. In this Chapter, we take an in-depth look at the awareness and satisfaction of specific search engines, the impact of paid advertising, conversion rates for specific activities, and the general public's attitudes toward search engines. Topics covered in this chapter include:

- Unaided/aided search engine awareness
- Search engine impression
- Search engine recommendation
- Search frequency of usage
- Primary search engine

- Main reason for using primary search engine
- Clicked on ads in search results
- Clicked on ads even though regular search results appear below
- Conversion rates
- Search engine attitudes
- Awareness of Bing
- Use of Bing
- Advantages of Bing
- Bing Compared to Google – specific attributes
- Bing Compared to Yahoo! – specific attributes
- Bing Compared to Google – overall
- Bing Compared to Yahoo! – overall
- How first heard about Bing

About VoIP

Coming in Q4 – contact Ipsos Reid for a list of proposed topics.

About Ipsos Reid

Ipsos Reid is Canada's largest marketing and public affairs research company and the country's most trusted research brand. Ipsos member companies offer expertise in advertising, customer loyalty, marketing, media, and public affairs research. Ipsos has a full line of custom, syndicated, omnibus, panel, and online research products and services, guided by industry experts and bolstered by advanced analytics and methodologies.

To learn more about this study program, please visit the Ipsos Reid website (www.ipsos.ca) or contact:

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