

# CANADA ONLINE!



A comparative analysis of Internet users and non-users in Canada and the world: Behaviour, attitudes and trends 2004

## EXECUTIVE SUMMARY

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Welcome to *Canada Online!*—a summary of the results and findings from our first baseline study of the Canadian Internet Project (CIP) in 2004.

CIP is a comprehensive survey comparing Canadian Internet users and non-users across a wide range of variables, and exploring the impact of online technologies in Canada from an international perspective. The findings in this study are based on the responses of 3,014 randomly selected individuals in Canada, 18 years of age or older, who participated in a telephone survey in May and June 2004. We view this survey as the first of a series, conducted every other year. Our objective with each survey will be to return to many of the original respondents, as well as other Canadians, to gather data on Internet and other media use patterns, thus enabling us to track changes over time. The current report provides a benchmark for future studies.

CIP's goal is to examine how the Internet influences our social, political, cultural and economic behaviour and ideas by examining the attitudes, values and perceptions of both Internet users and non-users. 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. It is our hope that, by studying the Internet as it develops over time, we can better understand its implications for and effects on society.

CIP is a partner of the World Internet Project (WIP)—an international research consortium comprising research centres in various countries around the world. The purpose of WIP is to exchange and compare data about Internet users and non-users obtained in response to a subset of approximately 30 questions posed in survey questionnaires in participating countries. Presently, there are 21 official member countries of WIP—17 of which have conducted at least one study. Membership in WIP is growing every year as fascination and interest in learning about the role of the Internet in society continues to increase.

Systematically examining Internet users and non-users permits meaningful comparison of the two groups. An important goal of the CIP research is to study shifts in media use as predominant use patterns evolve from passively viewing traditional media, such as television, to more actively engaging in and using new technologies, such as the Internet. We hope that the results and analysis from our study will not only inform academic research on the Internet, but also influence government and industry policy and practice and contribute towards innovation in online digital content creation.

Although there are many other studies that investigate Internet use in Canada, none has the breadth and comparative perspective of this one. CIP differs from most other studies in the following ways:

- It is comprehensive in scope and looks at the social role of the Internet through investigation of both attitudes and behaviours of users.
- It studies behaviour and attitudes of Canadians who do not use the Internet (Internet non-users) as well as those who do use it (Internet users), thus allowing a comparison of the two groups and an analysis of the movement of Canadians from offline to online.
- It provides an international comparative analysis of online and offline behaviour and attitudes through its association with WIP.
- It intends to continue as a longitudinal panel study that compares findings from year to year to effectively track trends and changes.
- It is a tripartite partnership of academic research centres, government and industry, with the goal of effectively engaging and influencing decision making at all levels in society.

In this report, we compare Internet users and non-users and examine the behaviour and attitudes of both across demographic variables particularly significant to the Canadian milieu (language, region, gender, income, age and so on). We also look at use patterns (locations from which the Internet is accessed and frequency of Internet use) and differences in the degree of Internet experience.

We hope you find the results and our discussion informative and enlightening. We live in the midst of a communication revolution—or is it an evolution?—where change is the order of the day. One thing is certain: Any discussion on how Canadians use and feel about the Internet is likely to be revealing. The Internet is, without question, one of the most pervasive and dynamic communication applications since the invention of the printing press.

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# **Executive Summary**

In this summary, we present the findings that appeared to the research team to be most important for understanding how the Internet is changing the lives of Canadians. For example, although online entertainment services are increasing, the Internet is perceived by Canadians as primarily a medium of information and communication. We were also struck by the powerful influence that years of experience on line and time spent each week using the Internet have on usage patterns of attitudes towards the Internet. For the most part, we have focused on summarizing key patterns and relationships, leaving broader interpretations to the reader. Some findings support conventional wisdom or the findings of previous studies, while others identify patterns or relationships not previously observed. Still others point to the need for further analysis or research. We hope that the highlights we have selected from our comprehensive analysis for this summary will provide a helpful introduction to the full report.

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### **Profile of Internet Use and Non-use:**

- Of all Canadians, 72% use the Internet from various public and private locations
- Of current non-users, 34% were previously online
- Of all Canadians (users and non-users combined), 82% have been online at one time or another
- Non-users cite a general lack of interest in, and usefulness of, the Internet, followed by technological inadequacies, as the predominant reasons for not being online
- Approximately one-third of all non-users indicate that they intend to use the Internet in the future
- Provinces in Canada with the most users are Alberta, Ontario and British Columbia; provinces with the fewest users are Quebec and the Atlantic provinces
- Home is the most popular place for Internet access (85% of all users)
- Canadian users average 13.5 hours per week online
- The majority of Canadians are heavy Internet users; 56% report being online seven or more hours per week
- Most Canadians are very experienced users; 61% report being online for five years or more
- More English-speaking than French-speaking Canadians are online (74% versus 66%) and for a greater amount of time in an average week (14.14 hours versus 10.79 hours)
- Of all respondents, 84% report children and youth in their household use the Internet
- Canadians overwhelmingly use English and French as their primary languages on the Internet
- Among Canadians who use other languages online, some 37 languages were reported

### **New Information and Communication Technologies in the Home:**

- Of all Canadians, 75% have at least one computer in the home
- A majority of all Canadians (92%) have VCRs or DVD players in their household and use cell phones (64%)
- Nearly one in five Canadians uses the most current technologies (i.e., MP3 players and personal digital assistants (PDAs)); those that do are predominantly Internet users
- Compared to non-users, Internet users tend to make greater use of all information and communication technologies (i.e., VCRs, DVD players, cell phones, video game consoles, digital cameras, MP3 players and PDAs) in the household

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- More Canadians access the Internet through telephone than through cable (53% versus 40%)
- A majority of Canadians report having high-speed Internet access (66%)

### **Perception of the Value of, and Comfort Level with, New Communication Technologies:**

- Overall, most Canadians perceive technology to be neutral—they don't feel that new technologies make the world better or worse
- The more time users spend on the Internet, the more likely they are to think that new communication technologies make the world a better place

### **Internet Use and More Traditional Media Use:**

- Overall, the Internet appears to supplement rather than replace more traditional media use
- Internet users spend slightly fewer hours per week than do non-users accessing certain traditional media, such as television, radio, magazines, and newspapers
- Internet users appear to engage more in other traditional media activities than do non-users, including reading books, watching movies in theatres, listening to music, and using the telephone
- Younger Canadians tend to engage in more Internet activities and use traditional media more often than do older Canadians

### **Internet Use and Television Viewing:**

- When asked whether Internet use had affected their television viewing habits, most Internet users claimed it had not
- Internet users report watching an average of 3.7 fewer hours per week of television than do non-users

### **Internet and the Telephone:**

- Of all Internet users, 74% believe that the Internet has reduced their use of the traditional telephone
- More frequent Internet users are less likely than lighter users to value the telephone for personal use

### **Media Use for Information versus Entertainment:**

- Users value the Internet much more as a source of information than as a source of entertainment
- Internet users spend nearly twice as much of their time online for information than they do for entertainment (6.1 hours versus 3.3 hours in an average week)

### **General Internet Use Patterns:**

- The most frequent users of the Internet are English-speaking, male, young, and highly educated
- A majority of Internet users (61%) are very experienced and have been online for five years or more
- Among very heavy users (those who spend 14 hours or more online per week), 94% have access to the Internet from home
- Of employed Internet users, 40% undertake at least some work activities from a home Internet site

### **E-mail:**

- E-mail use is the principal activity of all Internet users (91% of all those online use e-mail)
- E-mail use increases with experience online and time spent using the Internet
- On average, Internet users use e-mail 63% of the time for personal-related activities and 37% of the time for work-related activities
- Canadians spend an average of four hours a week reading and writing e-mails

### **Use of Other Internet Communication Devices/Services:**

- Of all Internet users, 26% engage in instant messaging
- Only 6% of Internet users polled in this survey use chat
- A majority of users (83%) report being aware they could have conversations on the Internet (that is, Voice over Internet Protocol, or VoIP)
- Of all users, 19% use the Internet for voice communication (VoIP) (It is important to note that the CIP survey was conducted in 2004 when VoIP was not yet being marketed in any substantial way in Canada)

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- Alternate Internet communication services such as instant messaging, chat, and online voice communication are most popular with younger Canadians
- Of those who have used the Internet for voice conversations, nearly two-thirds feel it has reduced their use of the traditional telephone at least somewhat; 15% think it has reduced their telephone use substantially

### **Internet Activities:**

- The Internet in Canada is used for a substantial range of activities, predominantly more for services than for accessing particular sites
- According to time spent online, the most popular activities reported are reading newspapers or magazines, accessing national and international affairs, researching medical information, playing video games, listening to recorded music, and downloading music files
- According to frequency of use, in addition to the above activities, the Internet is popular for accessing travel information and making travel arrangements, and visiting television station and network websites
- Internet users are most likely to visit websites that provide information and services related to leisure activities, even though they report spending most time on information-oriented websites
- Between one-third and one-half of all Internet users had visited a website dealing with cultural and leisure activities in the three months prior to the survey

### **Canadian Cultural Content on the Internet:**

- Among Internet users, 70% claim that they never or rarely access Canadian cultural content online
- Only 25% of users are very satisfied with the quantity of Canadian cultural content on the Internet, whereas 30% are very satisfied with the quality of Canadian cultural content online
- Slightly more, 32%, are very satisfied with the accessibility of Canadian cultural content online
- When asked to rate their satisfaction with the quality, quantity, or accessibility of Canadian content online, more than one in five Internet users responded “don’t know”
- Only 27% of Canadians are aware of the Canadian portal website, [culture.ca](http://culture.ca), and significantly less (12%) access the site

### Accessing News on the Internet:

- Among Internet users, 65% access news sites at least once a week (one-third access news sites every day)
- The top three sites mentioned by English-speaking Internet users as their news source are MSN (19%), Yahoo (10%) and CBC (9.5%)
- For French-speaking users, their top three sites for news are Radio Canada (15%), MSN (14%) and CANOE (12%)
- Compared to other users, those who most frequently seek news from the Internet tend to be younger, more highly educated, English-speaking and male with a higher household income
- Of all news sites visited, 41% were Canadian while 39% were American
- The most frequently mentioned news websites were also major news providers rather than small, local or independent sites

### Government Internet Sites:

- More than half of Internet users had accessed either a federal or provincial government website in the 12 months prior to the survey
- Federal and provincial websites are accessed more often than are other government websites
- More than half of all users (57%) have accessed a government site to access information or download a form
- Of all users, 24% report they have applied for a government program or service using the Internet
- Only 10% claim to have used the Internet for an online government consultation or survey

### Shopping on the Internet:

- A majority of Canadian Internet users (52%) have made an online purchase
- Books were the predominant item purchased by online shoppers in the three months prior to the survey
- Other common online purchases include travel arrangements, clothes, computers, CDs, software, and electronic goods
- Most Internet users (55%) prefer Canadian sites when purchasing online
- Of all Internet users, 33% report that they do less shopping at local retail stores as a result of increased purchasing online

### **Parents' Perceptions of Children and Youth on the Internet:**

- Of all respondents (users and non-users) that have children (6–11 years old) in their household, 70% report that the children use the Internet
- Of all respondents (users and non-users) that have youth (12–17 years old) in their household, 95% report that the youth use the Internet
- More users than non-users report that the children and youth in their household use the Internet (97% versus 85%)
- Respondents report that, on average, children spend 2.8 hours per week online, while youth spend 8.9 hours per week online
- Only one-third of respondents are confident that the children in their household have the ability to browse the Internet safely alone
- More than two-thirds of respondents feel confident that the youth in their household can safely use the Internet
- When online in the household, children and youth predominantly access the Internet in family-oriented, non-private rooms (38%)
- Very few children (6%) or youth (10%) have access to the Internet in their bedrooms

### **Internet Use and Television Viewing for Children and Youth:**

- Two out of three survey respondents (66%) claim the television viewing habits of the children or youth in their household have not changed as a result of Internet access
- The remaining 30% report that the children's or youth's television viewing has decreased as a result of using the Internet

### **Perceived Accuracy and Reliability of the Internet:**

- Internet users report a fairly high degree of trust in information obtained online (37% perceive that most or all information is reliable and accurate and 81% believe at least one half of it is reliable and accurate)
- In contrast, about 18% of Internet users believe little or none of the information on the Internet is reliable or accurate

### **Concern for Privacy on the Internet:**

- A high proportion of both Internet users and non-users expressed concern about privacy on the Internet (67% of users and 86% of non-users were very or extremely concerned about releasing personal information on the Internet)

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- Those more concerned about privacy than others tend to be English-speaking, older, lower income women, and those who use the Internet less frequently than others

### **Internet and Productivity at Work:**

- A majority of Internet users (62%) claim that the Internet helps them to be more or much more productive at their jobs
- Wealthier and more frequent users of the Internet feel more strongly that the Internet helps them to be more productive at work

### **Internet, the Government, and Political Power:**

- Only 23% of Canadian users agree or strongly agree that the Internet helps them have more political power
- More than half of all users (52%) disagree or strongly disagree that the Internet increases their political power
- Among users, 19% agree that the Internet will provide them with more say in government, while 58% of users disagree with this statement

### **Internet and Time with Friends and Family:**

- A large majority of users (83%) claim that the Internet has no impact on time spent with friends and family

### **Internet in Canada versus the World:**

- For all countries participating in WIP, Canada is second only to the United States in terms of Internet users (72% versus 76%)
- Internationally, Canada, the United States and Sweden have the most early adopters of the Internet
- Compared to other countries, Canada and the United States, along with Germany, Spain and South Korea, have predominantly heavy Internet users who spend the most time online
- In most countries age, education, income, and gender correlate quite highly with Internet use
- E-mail is the most important activity for Internet users in all countries surveyed
- Among all countries, Canada (52%), Germany (48%), Sweden (41%), Japan (40%) and the United States (39%) have the highest levels of online purchasing

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- In most countries, Internet users perceive that their television viewing has decreased as a result of being online
- The Internet is perceived as most reliable and accurate by users in Portugal (82%), and least reliable and accurate by users in Canada (36%), Sweden (28%), Germany (24%) and Japan (19%)
- The Internet is perceived to increase productivity at work in all countries
- The Internet is regarded as an important source of information in all countries
- The Internet is considered important or extremely important as a source of entertainment in China (68%) and Spain (55%), in particular, and less so in Canada (32%) and the United States (23%)
- Internet users in China have the strongest belief that the Internet has a role in helping them to better understand politics, have more say in government, and have political power
- Countries where Internet users do not hold as strong a belief that the Internet has a role in political empowerment are Sweden, Hungary, South Korea, Canada, the United States and Japan

## Reflections

This profile establishes a series of benchmarks so that future studies will be able to identify trends. In that sense, it is a snapshot of Internet use in Canada as of 2004. The major findings are summarized above. We invite readers to identify for themselves the relationships they find most notable.

The consistent importance of age, household income, education (especially at the upper end of the education scale), and language as predictors of Internet use and attitudes is striking. Throughout the analysis, the importance of experience with the Internet and hours per week spent online emerges clearly. More experienced and heavier Internet users make different use of the Internet than do newcomers and lighter users. Specifically, they access a wider range of services and, we might suggest, integrate the Internet more thoroughly into their everyday lives. We are also impressed by the apparent narrowing of the gender gap, the income gap, and the rural–urban gap, though all persist in the various measures of Internet use we have employed.

For the most part, differences in responses by geographic area are not substantial. In looking at regional differences, we found, not surprisingly, that populations in more affluent provinces, such as British Columbia, Alberta and Ontario, tend to make greater use of the Internet. Quebec often emerged as an outlier, with a lower level of Internet use than is found in other regions. In this case, the variables language and geographic area are difficult to disentangle. In future work, we intend to look more closely at key relationships within these various areas.

In analyzing Internet use patterns, we found that the Internet appeared to be valued much more for information than for entertainment. The kinds of websites most frequently visited are, for the most part, informational in nature. However, younger and heavier users go online more often than do older users for entertainment, suggesting that the entertainment side of the Internet is poised for growth.

Our analysis of the adoption of various Internet services, from Internet shopping and voice communication online to public use of government sites, tends to support the view of the “techno-optimists” that Canada, in company with many other nations, is on the verge of substantial change in the relationship of citizens and consumers to a wide range of institutions. The findings reported here suggest that Canada will see rapid growth in the next few years in online commerce, the delivery of news and cultural products through the Internet, new communication services (such as VoIP), as well as new forms of online leisure activities (including interactive gaming). In this respect, the importance of the cell phone, especially for younger Canadians, is important. Mobile interconnection is likely to become increasingly important. Much will depend upon cost structures—

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an important subject for future research. Traditional media are being forced to adapt.

The challenge of maintaining a Canadian presence in cyberspace also seems clear from the data. Many Canadian Internet users do seek cultural information online. However, roughly 70% report that they never or rarely access Canadian cultural content online and only 27% were aware of the Canadian culture portal, [culture.ca](http://culture.ca). Many Internet users had no clear opinion about the quality, quantity and accessibility of Canadian cultural content online, but a significant number were not very satisfied on any of these three measures. In general, French-speaking users were more likely than English-speaking users to be aware of [culture.ca](http://culture.ca) and to express satisfaction with the quality, quantity and accessibility of Canadian cultural content online.

In comparison to other countries, Canadians are more likely to be online and to spend considerable time using various Internet services. We are also among the leaders in high-speed connectivity. Although Canadians are skeptical about the potential of the Internet for political empowerment, as well as the reliability of information on the Internet, they are heavy users of basic services, such as e-mail, and have tended to be early adopters of Internet shopping and voice communication services.

It is our hope that other researchers in Canada will bring their research interests and questions to this data set. In particular, we believe that research on new delivery systems for culture products (including popular culture) and new forms of interconnectivity, especially the convergence of wireless, mobile and cross-platform devices and services, is a high priority. It is also important to undertake qualitative research—permitting deeper analysis of the reasons for the choices of users and non-users with respect to existing and planned services—in addition to continuing quantitative work.

## Partners

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