

ONLINE CANADIANS AND NEWS STUDY

Canadian Media Research Consortium (CMRC)

Future of News Summit 2008

May 2008



CONTENTS

	Page
Introduction	3
Executive Summary	5
Analysis	
Media Use 'Yesterday'	10
Share of News/Information by Platform	17
Top Story Exposure and Follow-up	26
Video vs. Text on the Web	40
Appendix	
Mobile Technology Use	48
Online Video, Social Media	51
Online and Mobile News and Alerts	55
Traditional Media Use	59

INTRODUCTION

INTRODUCTION

- Solutions Research Group is pleased to present the Canadian Media Research Consortium (CMRC) results of the 'Online Canadians and News' Study.
- The study consisted of 1,000 interviews exploring daily media use and news consumption.
- A key objective was to understand the interplay of the Internet and traditional media among those who have access to both.
- The survey was conducted online and a day-after-recall technique was used to accurately capture 'yesterday' news/information consumption behaviour.
- Invitations were sent to members of a professionally-managed panel representative of the online population of Canada by age, gender, and geography. Interviews were conducted in French and English and the survey took 9.6 minutes to complete on average.
- Survey period was April 29 to May 5, 2008.
- The interviews were complemented with 2 focus groups to provide additional texture to the survey findings.

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

- The research design stressed a behavioural approach and focused on time spent with various potential news/information platforms 'yesterday.' We kept the definition of news/information deliberately broad, ranging from typical national or international stories to pop culture information.
- We estimate that an average online Canadian (18+) spends some 2.3 hours in an average day consuming news and information using a minimum of six sources.
- The current news/information diet of an average online Canadian is quite varied—of the 2.3 hours of news/information intake daily, an estimated 24% comes from TV, followed by 22% each for each of Internet and newspapers. Magazines, radio and wireless devices account for the balance.
- The research confirms the importance of the Internet as a news/information source for younger generations (#1 source for 18-29 overall), accounting for 32% of total time with news/information yesterday, higher than newspapers and radio combined. But even among this group, there is significant exposure to a variety of other sources.

EXECUTIVE SUMMARY

- Despite the recent attention on mobile, wireless devices currently account for a mere 2% of all news/information consumption. Among smartphone owners, the comparable proportion is 8%, higher but still not at the same level as Internet, newspapers or television. But as a significant proportion of news consumed via mobile devices is sourced from the Internet, mobile devices clearly contribute to the reach and immediacy of the Internet as a platform for news.
- TV continues to deliver impact and memorability. It was singled out as the most likely source of exposure to yesterday's top story. When asked where they turned to for "more" on that top story, most identified the Internet as the key source for a deeper dive. Among the younger age groups, there was no contest with other media.
- According to online Canadians, easy access, searchability and access to a variety of opinions/perspectives differentiates the Internet from other sources. TV also is considered easy and accessible but the word "visual" is the main differentiator, along with "live" and "updated." Those who turn to newspapers for more on yesterday's top story are subscribers and talk of the fact that newspapers offer details, background and context.

COMMENTS

- There is no question that the Internet will continue to increase its importance to Canadians as a source of news and information, as a younger generation accustomed to on-demand access and personalization carries those expectations and their “habits” to their later adult years.
- TV’s major differentiation for news and information is that it is visual and live—as online video becomes more prominent and even easier to access, that differentiation will erode. Similarly, outside of habit, the main reason people say they turn to newspapers is for background and context, which is increasingly being replicated online, not just by online versions of papers but also from a variety of different sources.
- We are also witnessing the rise of an increasingly visual culture—while the preference for text vs. video clearly skews to text for the 45-59 and 60+ online users by a wide margin, younger Canadians are unsurprisingly more video oriented—the exact direction the Internet is heading for the next 10 years.



ANALYSIS

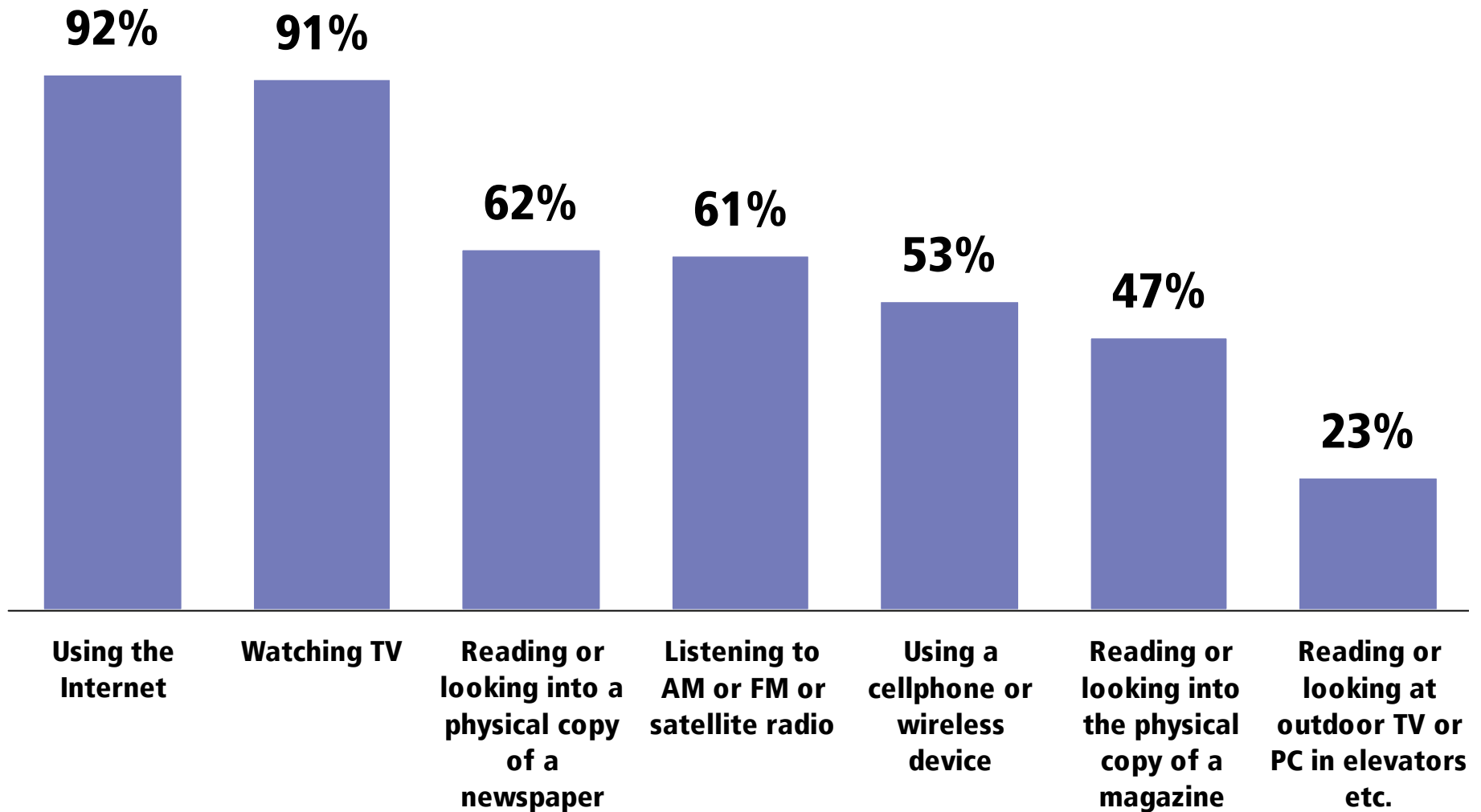


MEDIA USE 'YESTERDAY'

Internet and TV are the leading media among online Canadians—however, only a portion of time spent with them is for news/information.

MEDIA USE 'YESTERDAY'

SPENT AT LEAST SOME TIME WITH...



Base: Total Online Canada 18+

MEDIA USE 'YESTERDAY'








MEN VS. WOMEN



%










%

Using the Internet	92		92
Watching TV	90		92
Reading or looking into a physical copy of a newspaper	64		60
Listening to AM or FM or satellite radio	66		57
Using a cellphone or wireless device	56		51
Reading or looking into the physical copy of a magazine	44		51
Reading or looking at outdoor TV or PC in elevators etc.	24		22

Base: Total Online Canada 18+

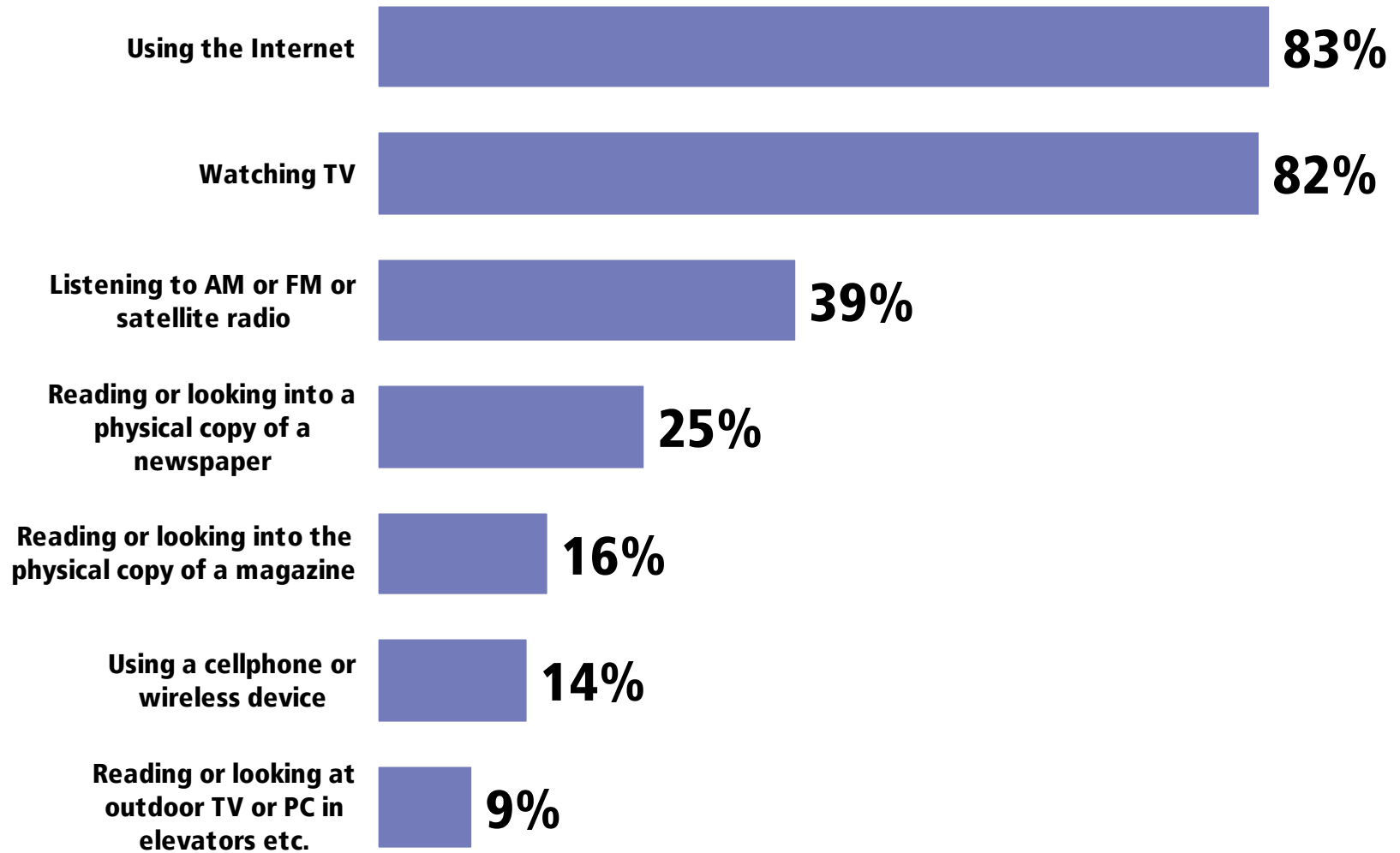
MEDIA USE 'YESTERDAY'

BY AGE GROUP		18-29 %	30-44 %	45-59 %	60+ %
Using the Internet		94	92	91	92
Watching TV		86	91	91	96
Reading or looking into a physical copy of a newspaper		51	54	67	75
Listening to AM or FM or satellite radio		52	61	65	65
Using a cellphone or wireless device		61	62	48	39
Reading or looking into the physical copy of a magazine		44	48	47	50
Reading or looking at outdoor TV or PC in elevators etc.		34	25	22	8

Base: Total Online Canada 18+

MEDIA USE 'YESTERDAY'

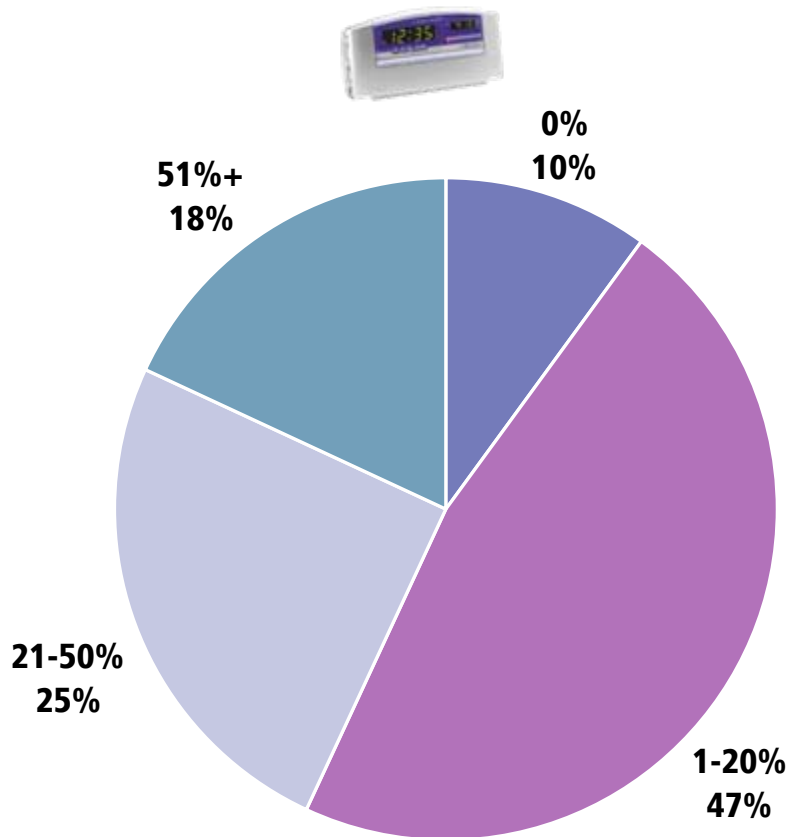
SPENT 1 HOUR OR MORE WITH... 'YESTERDAY'



Base: Total Online Canada 18+

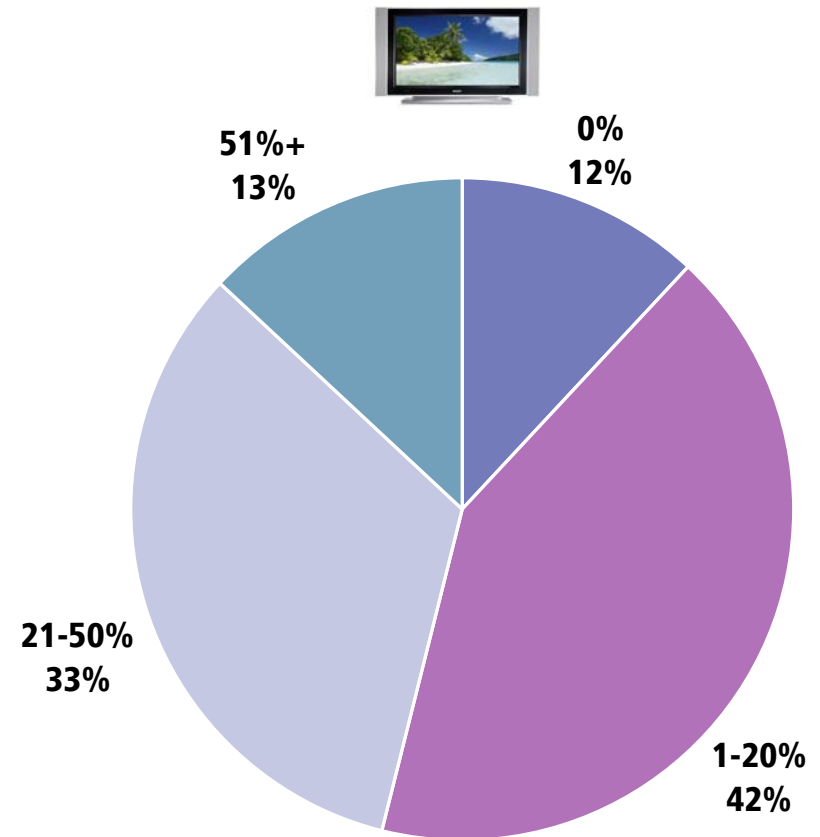
NEWS ON RADIO AND TELEVISION

% OF TOTAL TIME WITH PLATFORM THAT WAS NEWS/INFORMATION 'YESTERDAY'



NEWS/INFO CONTENT AS % OF ALL RADIO TUNING:

31%



NEWS/INFO CONTENT AS % OF ALL TV WATCHING:

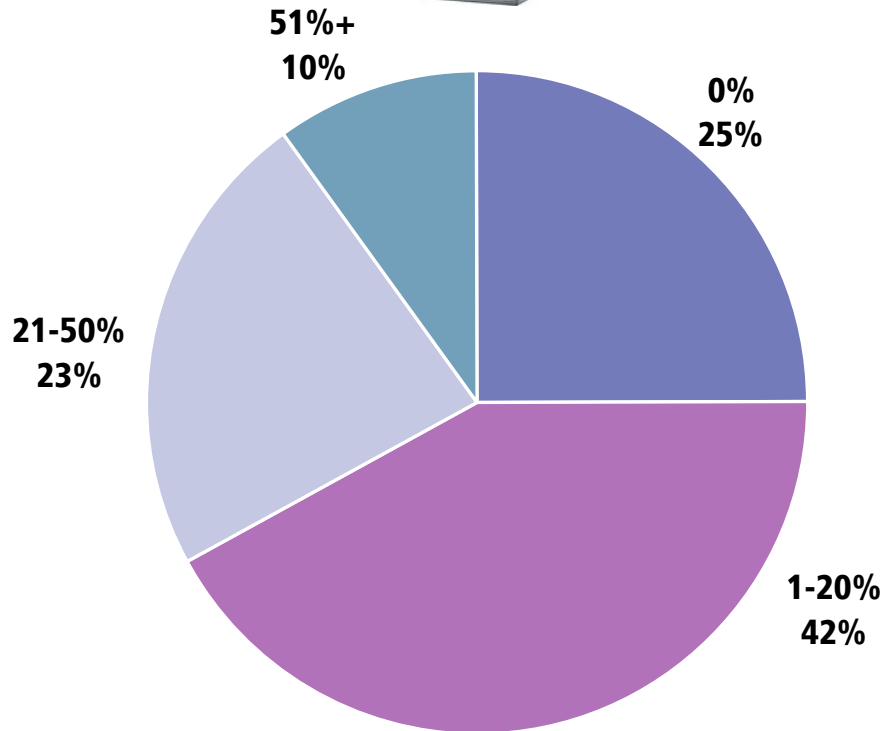
28%

Base: Listened to AM/FM or satellite radio 'yesterday'

Base: Watched TV 'yesterday'

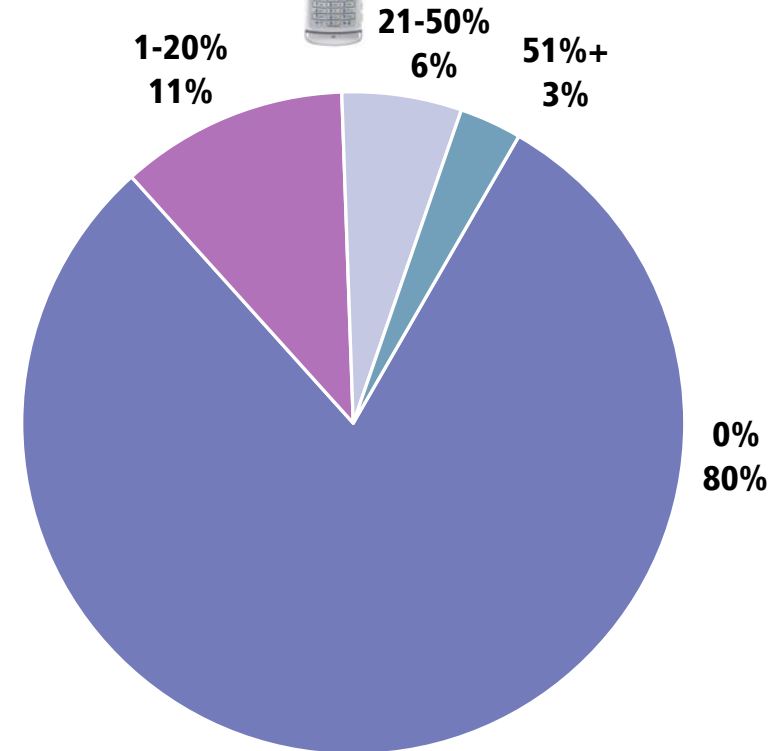
NEWS ON INTERNET AND WIRELESS DEVICES

% OF TOTAL TIME WITH PLATFORM THAT WAS NEWS/INFORMATION 'YESTERDAY'



NEWS/INFO CONTENT AS % OF ALL INTERNET USE:
21%

Base: Used Internet 'yesterday'



**NEWS/INFO CONTENT AS % OF ALL CELL PHONE/
WIRELESS DEVICE USE:**
6%

Base: Used wireless device 'yesterday'



SHARE OF NEWS/INFORMATION BY PLATFORM

Online Canadians spend 2.3 hours a day with news/information using at least 6 different platforms—TV leads by a narrow margin, with Internet and newspapers tied for the second spot.

ONLINE CANADIANS SPENT

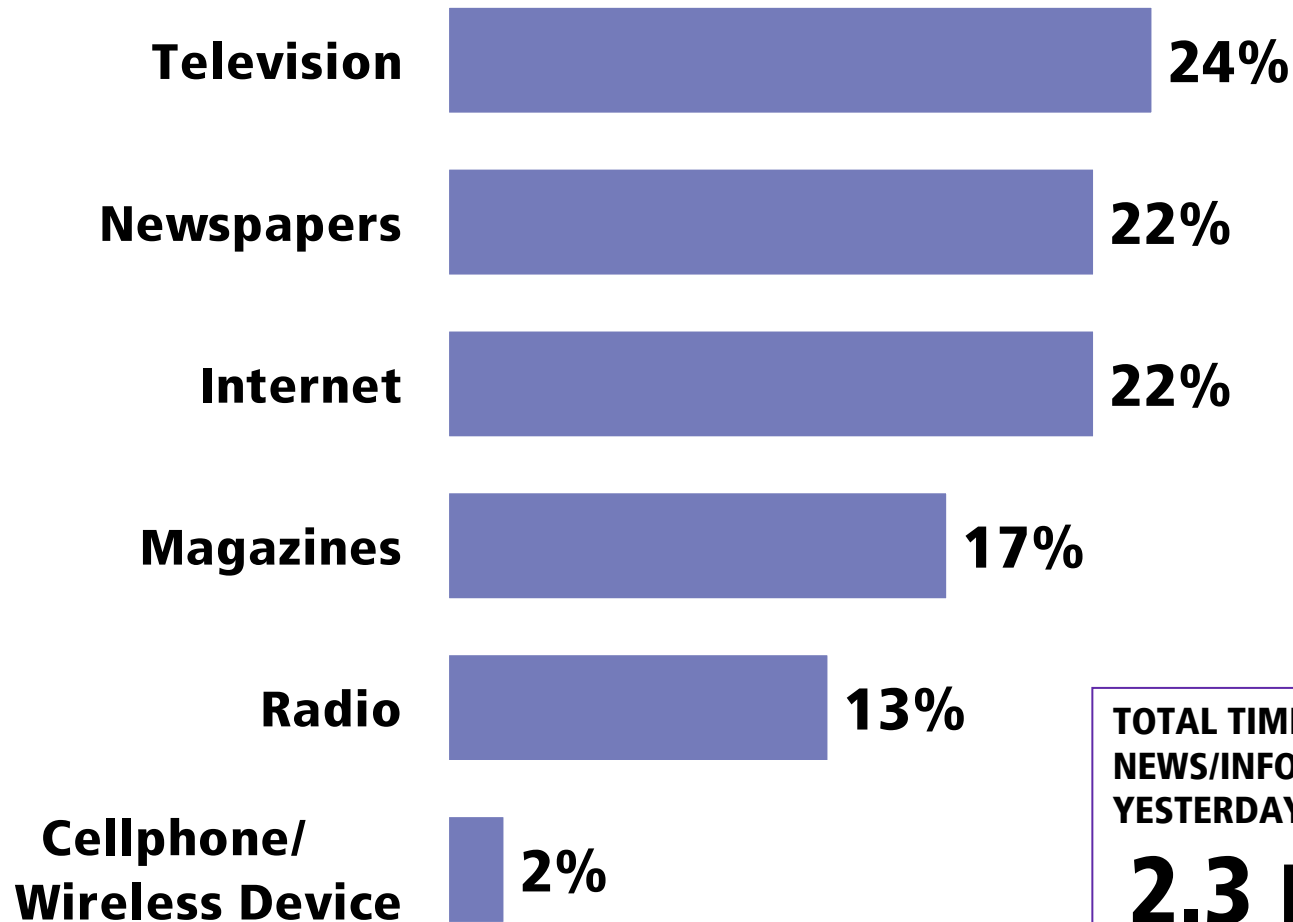


2.3 hours


YESTERDAY CONSUMING NEWS/INFORMATION

NEWS/INFORMATION CONTENT BY SOURCE

% OF TOTAL NEWS/INFORMATION CONTENT ACCOUNTED BY...



- Of the total time spent consuming news/information 'yesterday', TV accounted for 24% of total.

TOTAL TIME WITH NEWS/INFORMATION YESTERDAY: 
2.3 HOURS

Base: Total Online Canada 18+

Share of news/information for Internet is higher among Gen Y, men, English-speaking Canadians, and those who use mobile technologies. But even then, there is diversity in the sources used.



NEWS/INFORMATION CONTENT BY SOURCE

MEN VS. WOMEN



%



%

Television	23	26
Newspapers	23	21
Internet	23	21
Magazines	15	19
Radio	13	12
Cellphone/Wireless Device	3	1
TOTAL	100%	100%

Base: Total Online Canada 18+

NEWS/INFORMATION CONTENT BY SOURCE

BY AGE GROUP	18-29	30-44	45-59	60+
	%	%	%	%
Television	24	21	24	31
Newspapers	16	20	24	27
Internet	32	24	19	17
Magazines	15	18	18	13
Radio	10	13	14	11
Cellphone/Wireless Device	3	3	2	0
TOTAL	100%	100%	100%	100%

Base: Total Online Canada 18+

NEWS/INFORMATION CONTENT BY SOURCE

BY DIGITAL LIFESTYLE	Has smartphone %	Has laptop %	Uses PC @ work most of the time %
Television	19	22	18
Newspapers	17	19	19
Internet	25	25	28
Magazines	17	16	16
Radio	13	15	15
Cellphone/Wireless Device	8	3	3
TOTAL	100%	100%	100%

Base: Total Online Canada 18+

NEWS/INFORMATION CONTENT BY SOURCE

BY LANGUAGE	English %	French %
Television	24	27
Newspapers	22	24
Internet	24	17
Magazines	17	16
Radio	12	14
Cellphone/Wireless Device	2	2
TOTAL	100%	100%

Base: Total Online Canada 18+

NEWS/INFORMATION CONTENT BY SOURCE

BY DAY OF WEEK	Weekdays	Weekends
	%	%
Television	25	24
Newspapers	21	24
Internet	24	19
Magazines	16	18
Radio	12	13
Cellphone/Wireless Device	2	2
TOTAL	100%	100%

**TOTAL TIME WITH NEWS/
INFORMATION WEEKDAYS:**

2.4 HOURS

**TOTAL TIME WITH NEWS/
INFORMATION WEEKENDS:**

2.0 HOURS

Base: Total Online Canada 18+



TOP STORY EXPOSURE AND FOLLOW-UP

*News on TV delivers high memorability, over and above its share of news/information consumption—
Internet leads for deeper dives.*

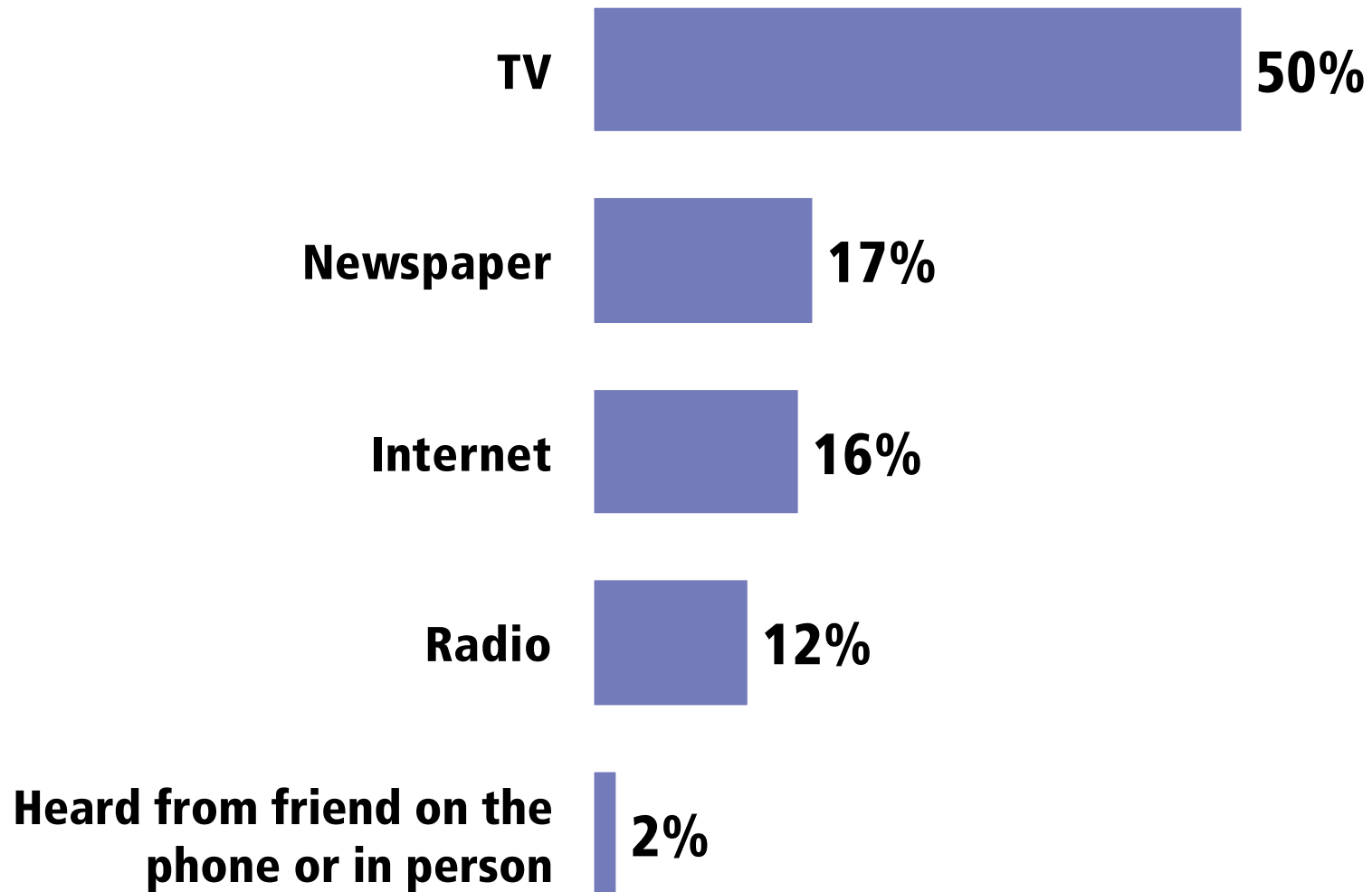
TOP-OF-MIND NEWS STORY FROM YESTERDAY

SURVEY PERIOD—APRIL 29 TO MAY 5, 2008

Floods in New Brunswick & Quebec	13%
Daughter held captive 24 years in Austria	12%
Montreal Canadians defeated in playoffs	9%
Checking weather reports	5%
U.S. presidential candidates	4%
Brampton couple stabbed to death in parking lot	3%
Pet lion escapes in Quebec	2%
Gas and oil prices	2%
Brenda Martin leaves Mexican jail for Canadian jail	2%
Ducks die in pond at Oil Sands project in Alberta	2%
Other	47%

Base: Total Online Canada 18+, excludes none/don't know responses

WHERE DID YOU FIRST READ, HEAR OR WATCH THIS STORY YESTERDAY?



Base: Mentioned specific story top-of-mind

WHERE DID YOU FIRST READ, HEAR OR WATCH THIS STORY YESTERDAY?



%



%

MEN VS. WOMEN

	Men	Women
TV	48	52
Newspaper	19	14
Internet	18	15
Radio	12	13
Heard from friend on the phone or in person	1	3

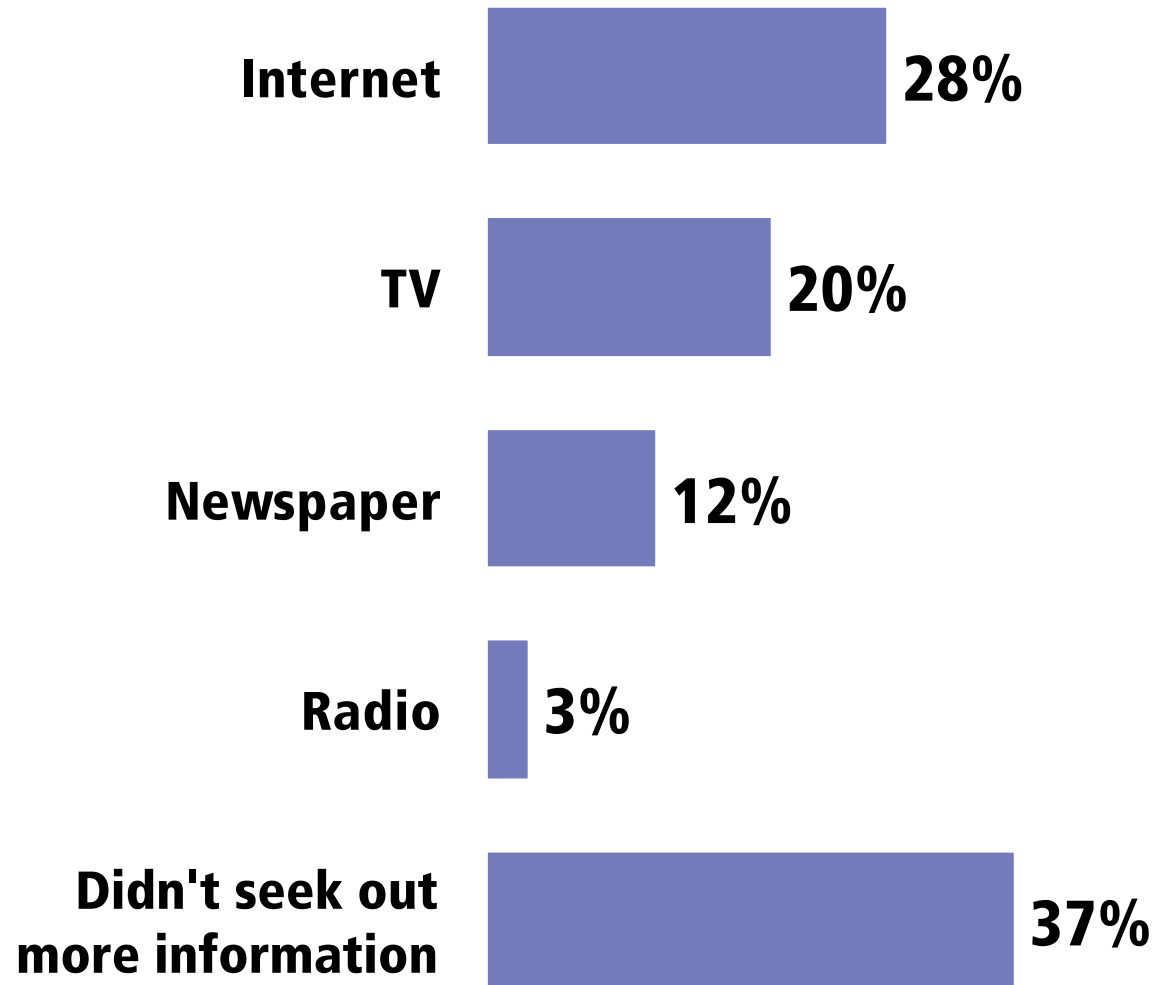
Base: Mentioned specific story top-of-mind

WHERE DID YOU FIRST READ, HEAR OR WATCH THIS STORY YESTERDAY?

BY AGE GROUP	18-29	30-44	45-59	60+
	%	%	%	%
TV	48	44	51	59
Newspaper	11	16	18	19
Internet	25	21	12	10
Radio	9	14	13	10
Heard from friend on the phone or in person	2	3	2	1

Base: Mentioned specific story top-of-mind

WHERE DID YOU GO NEXT TO FIND OUT MORE?



Base: Mentioned specific story top-of-mind

WHERE DID YOU GO NEXT TO FIND OUT MORE?

BY AGE GROUP	18-29	30-44	45-59	60+
	%	%	%	%
Internet	41	31	23	21
TV	14	19	23	20
Newspaper	2	7	14	26
Radio	4	1	4	4
Didn't seek out more information	38	41	35	30

Base: Mentioned specific story top-of-mind



INTERNET

Easy, Quick

Searchable

Variety



TELEVISION

**Easily
Accessible**

Visual

Live

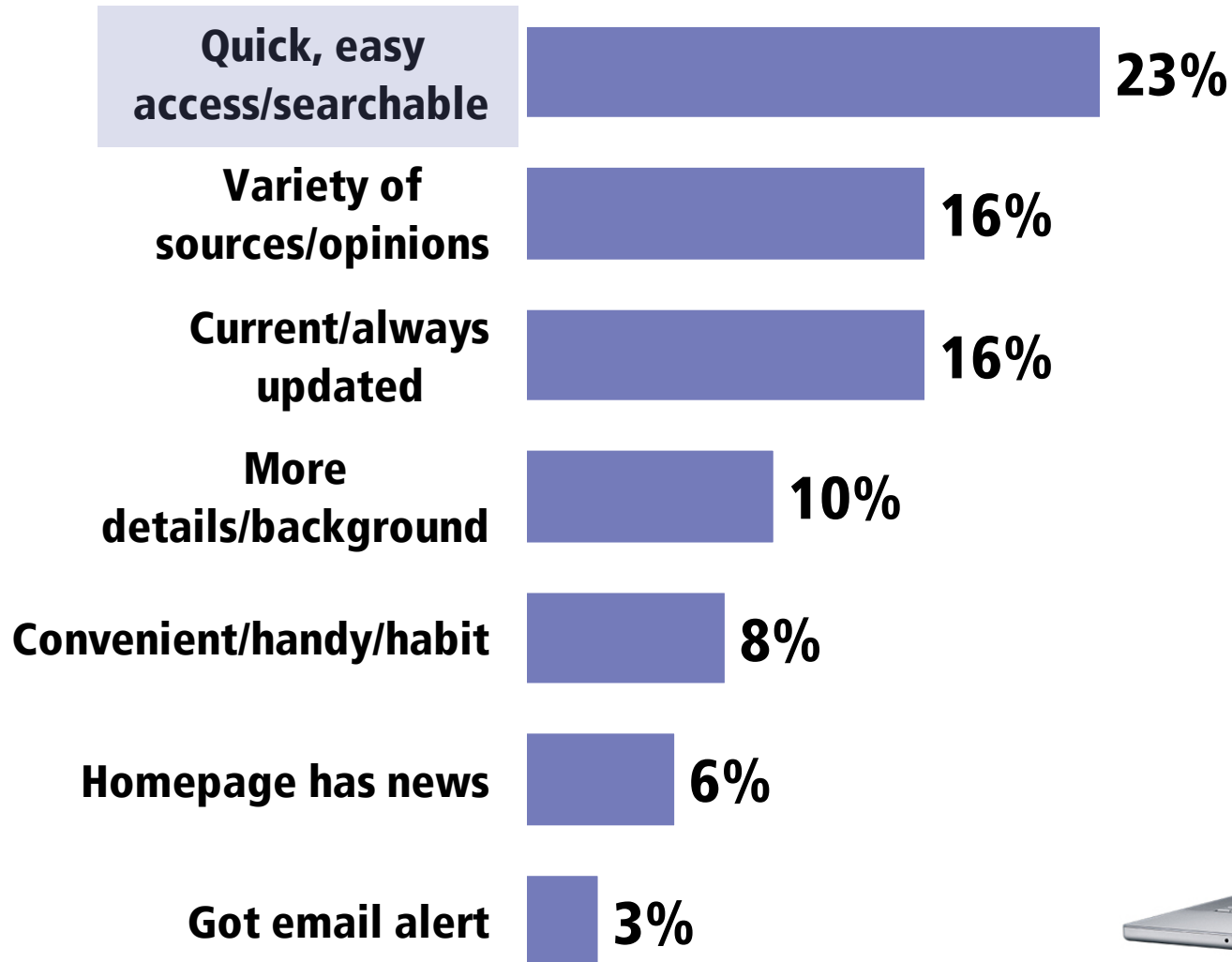


NEWSPAPERS

**Daily
Subscriber**

**More Details,
Background**

WHAT SET THE INTERNET APART AS A GO-TO SOURCE FOR MORE INFORMATION?



Base: Mentioned Internet as secondary source, excluding none/don't know responses

WHAT SET THE INTERNET APART AS A GO-TO SOURCE FOR MORE INFORMATION?

“Saves paper—newspaper is awkward to read in print, it’s much easier to browse online.” (Male, 18-24)

“You get information faster than when watching TV, where I would have had to wait for all the other news stories that were before it to finish.” (Female, 18-24)

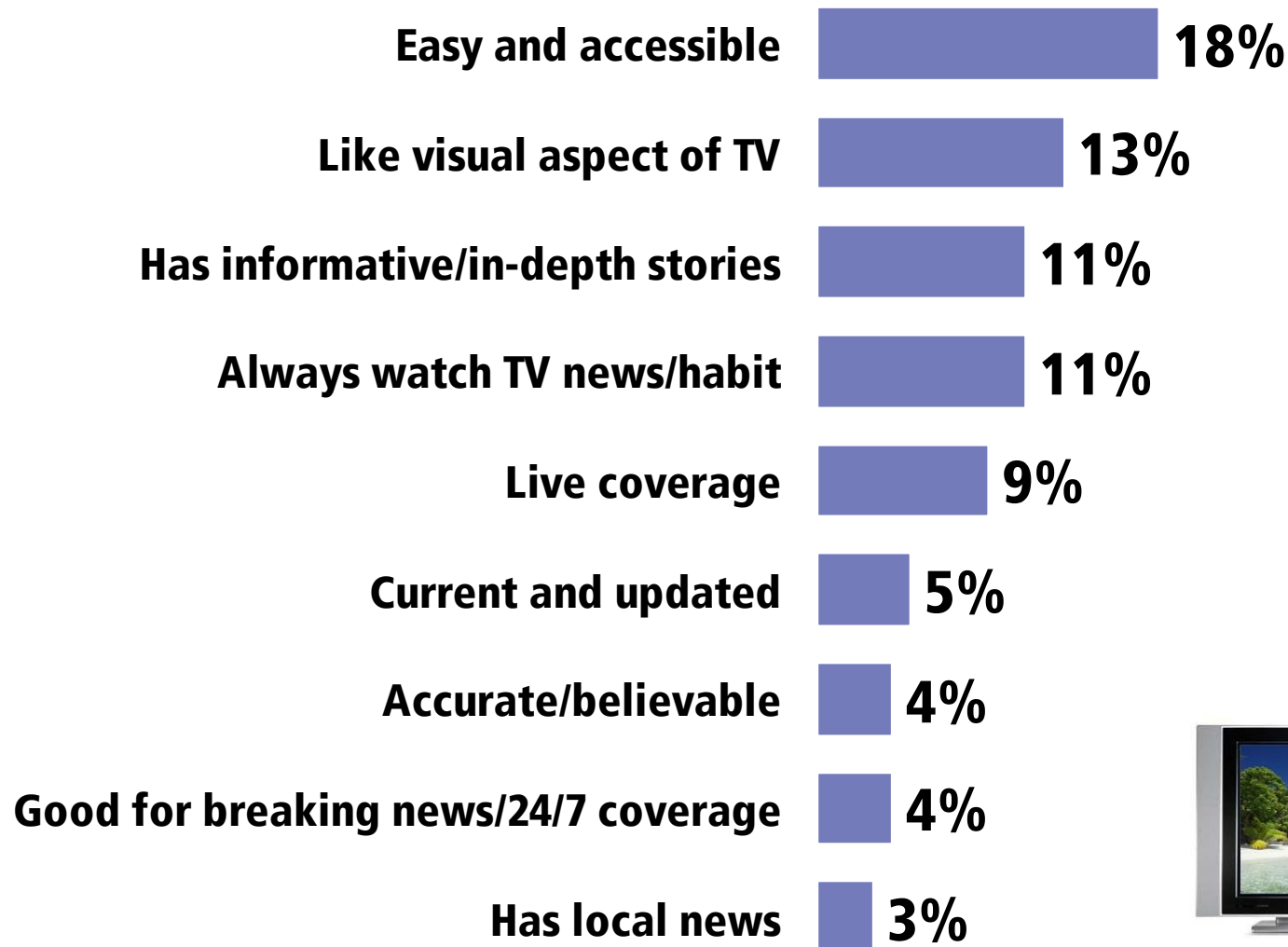
“Readily available and searchable from multiple news sources at once.” (Male, 35-49)

“I didn’t hear the whole story on the radio, so the internet news filled in the gaps.” (Female, 50-64)



Base: Mentioned Internet as secondary source, excluding none/don't know responses

WHAT SET TELEVISION APART AS A GO-TO SOURCE FOR MORE INFORMATION?



Base: Mentioned TV as secondary source, excluding none/don't know responses

WHAT SET TELEVISION APART AS A GO-TO SOURCE FOR MORE INFORMATION?

“Easiest to get to with a 4 year old around and the computer in the basement.” (Female, 25-34)

“I can turn it on and watch while I eat my breakfast. It's fast and convenient and hands free so I can drink my coffee.” (Female, 35-49)

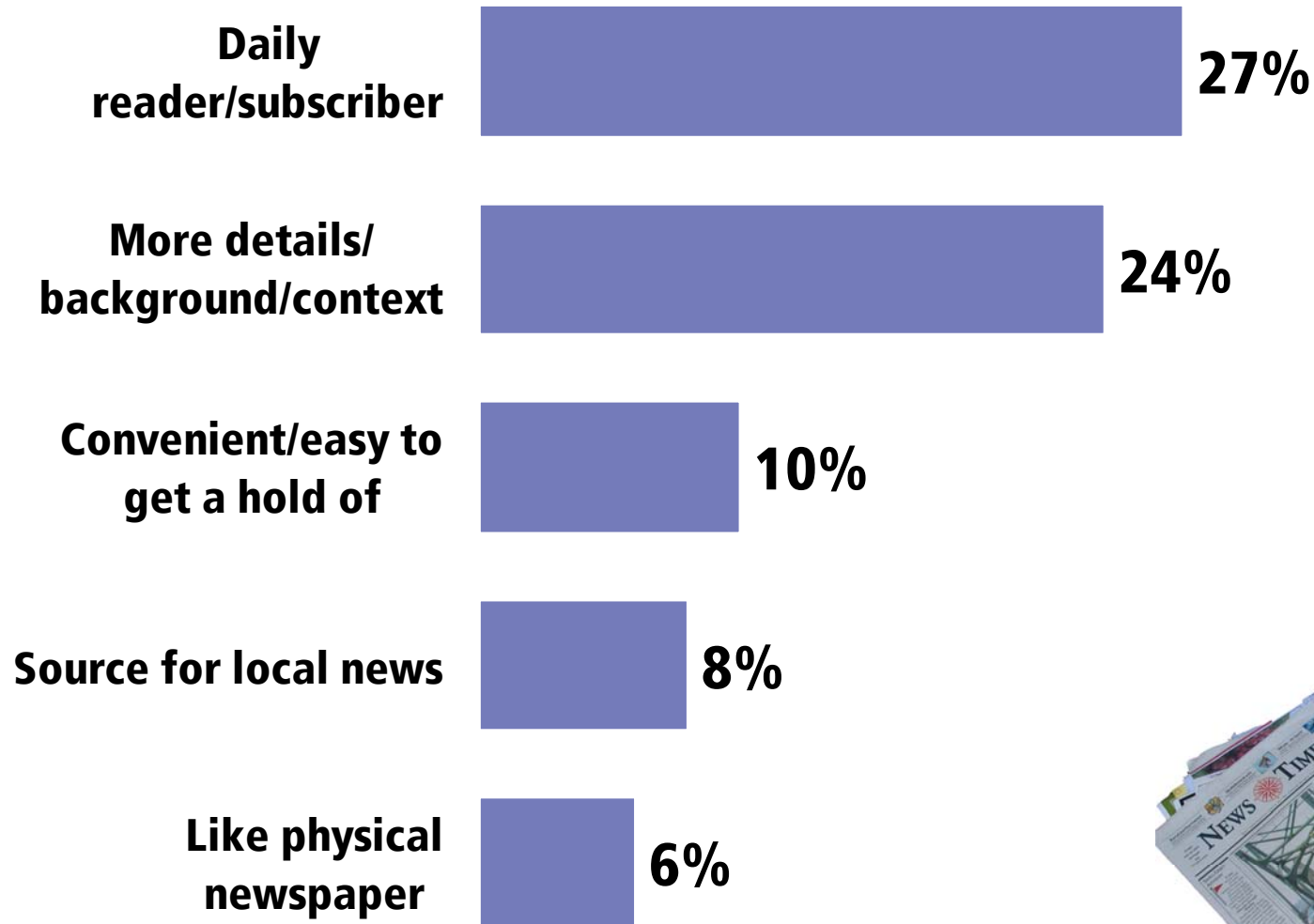
“To see what they said when they caught that culprit.” (Male, 35-49)

“TV is a readily accessible source of info, as it is in my living room and is usually set on CNN throughout the day and part of the evening.” (Female, 65+)



Base: Mentioned TV as secondary source, excluding none/don't know responses

WHAT SET NEWSPAPERS APART AS A GO-TO SOURCE FOR MORE INFORMATION?



Base: Mentioned newspapers as secondary source, excluding none/don't know responses

WHAT SET NEWSPAPERS APART AS A GO-TO SOURCE FOR MORE INFORMATION?

“The information was more in depth. They had more comments from people and other sources.” (Female, 50-64)

“You can relax when you read a newspaper—on off time at work.” (Female, 50-64)


“Read the newspaper every day and go to the Internet second.” (Female, 50-64)



Base: Mentioned newspapers as secondary source, excluding none/don't know responses

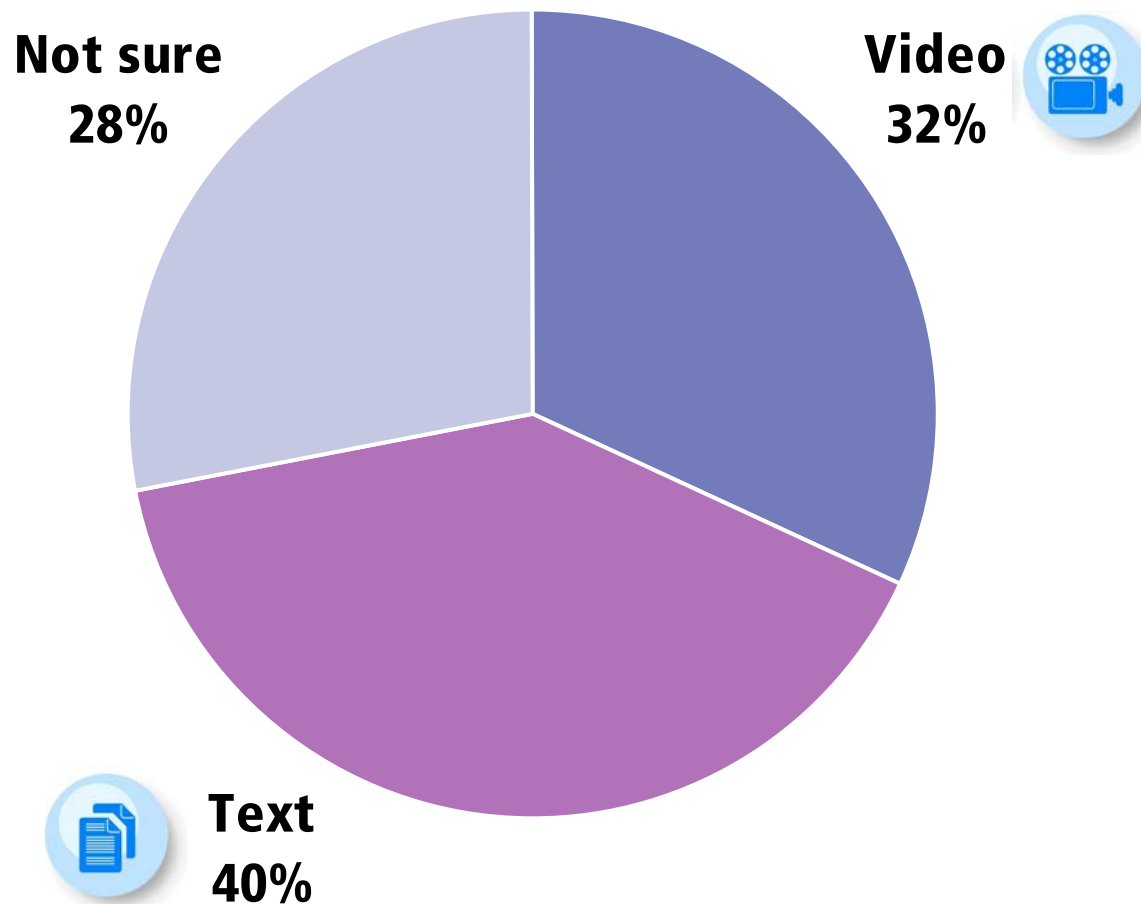


VIDEO vs. TEXT ON THE WEB



Older online Canadians prefer text on the web by a wide margin whereas it's a tie among Gen Y.

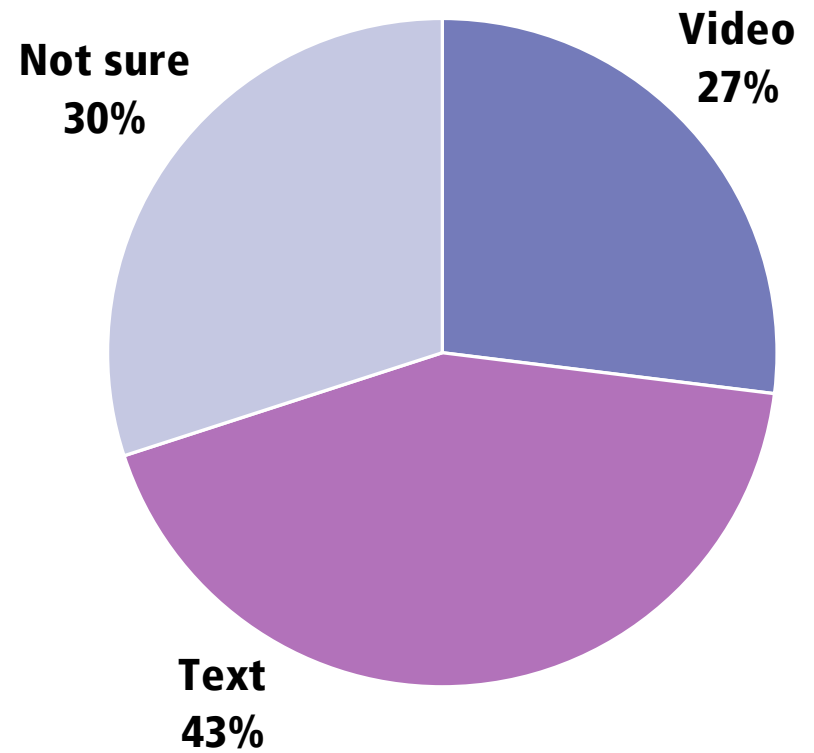
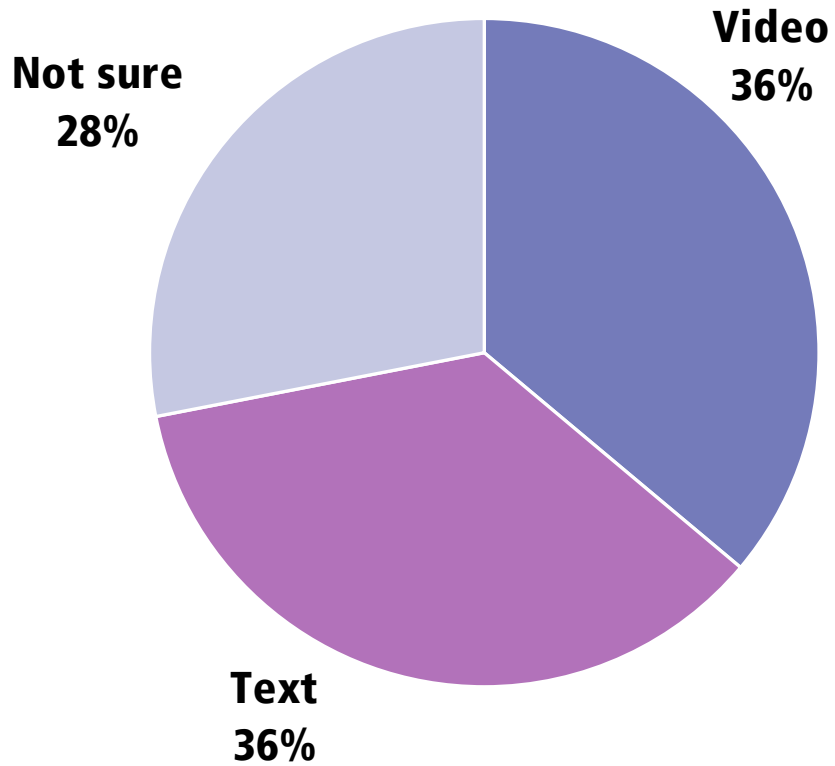
VIDEO OR TEXT PREFERENCE ON THE WEB



Base: Total Online Canada 18+

VIDEO OR TEXT PREFERENCE ON THE WEB

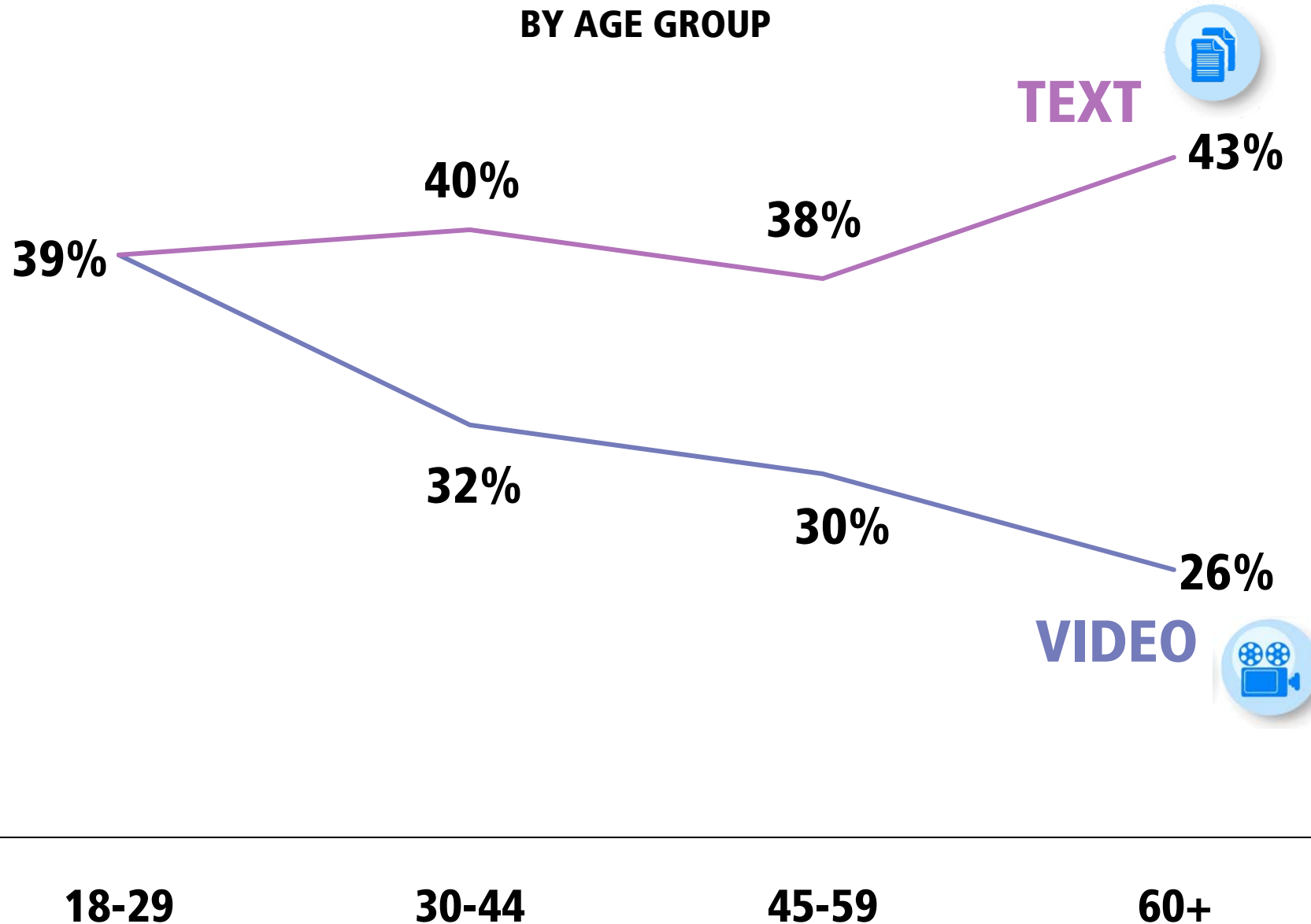
MEN VS. WOMEN



Base: Total Online Canada 18+

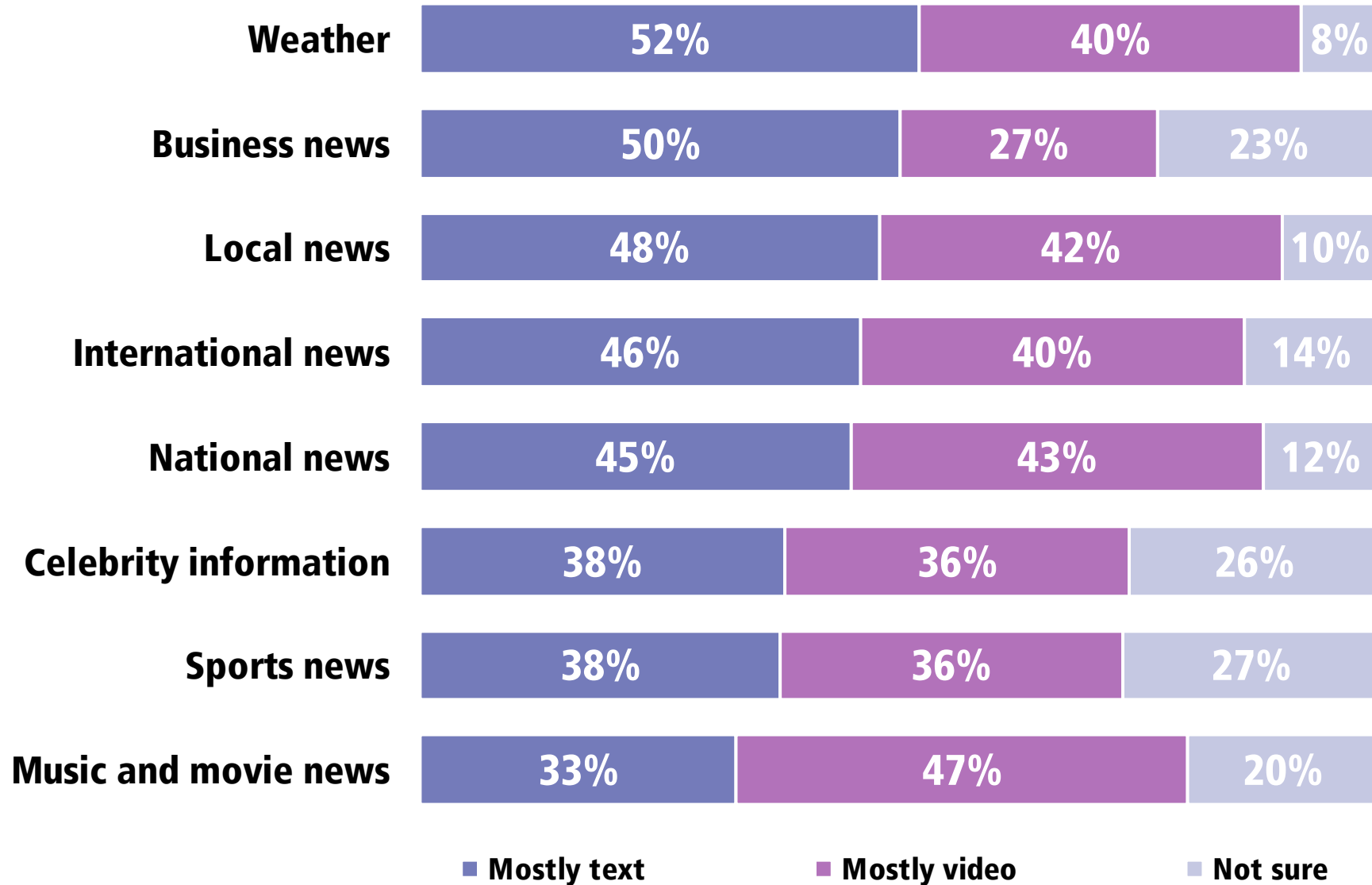
VIDEO OR TEXT PREFERENCE ON THE WEB

BY AGE GROUP



Base: Total Online Canada 18+, "don't know" responses not shown

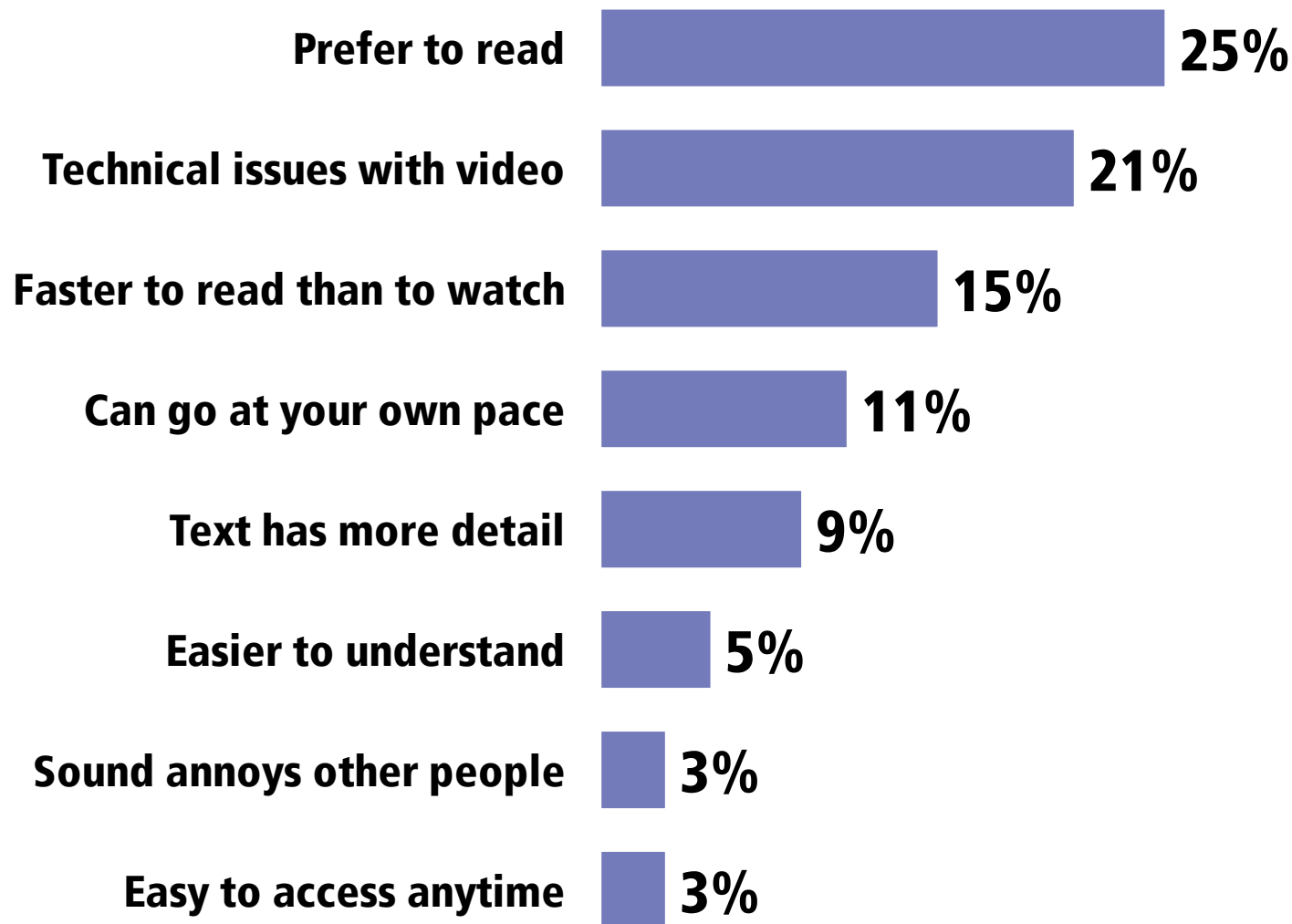
VIDEO OR TEXT PREFERENCE ON THE WEB BY SUBJECT



Base: Total Online Canada 18+

WHY PREFER TEXT MOSTLY

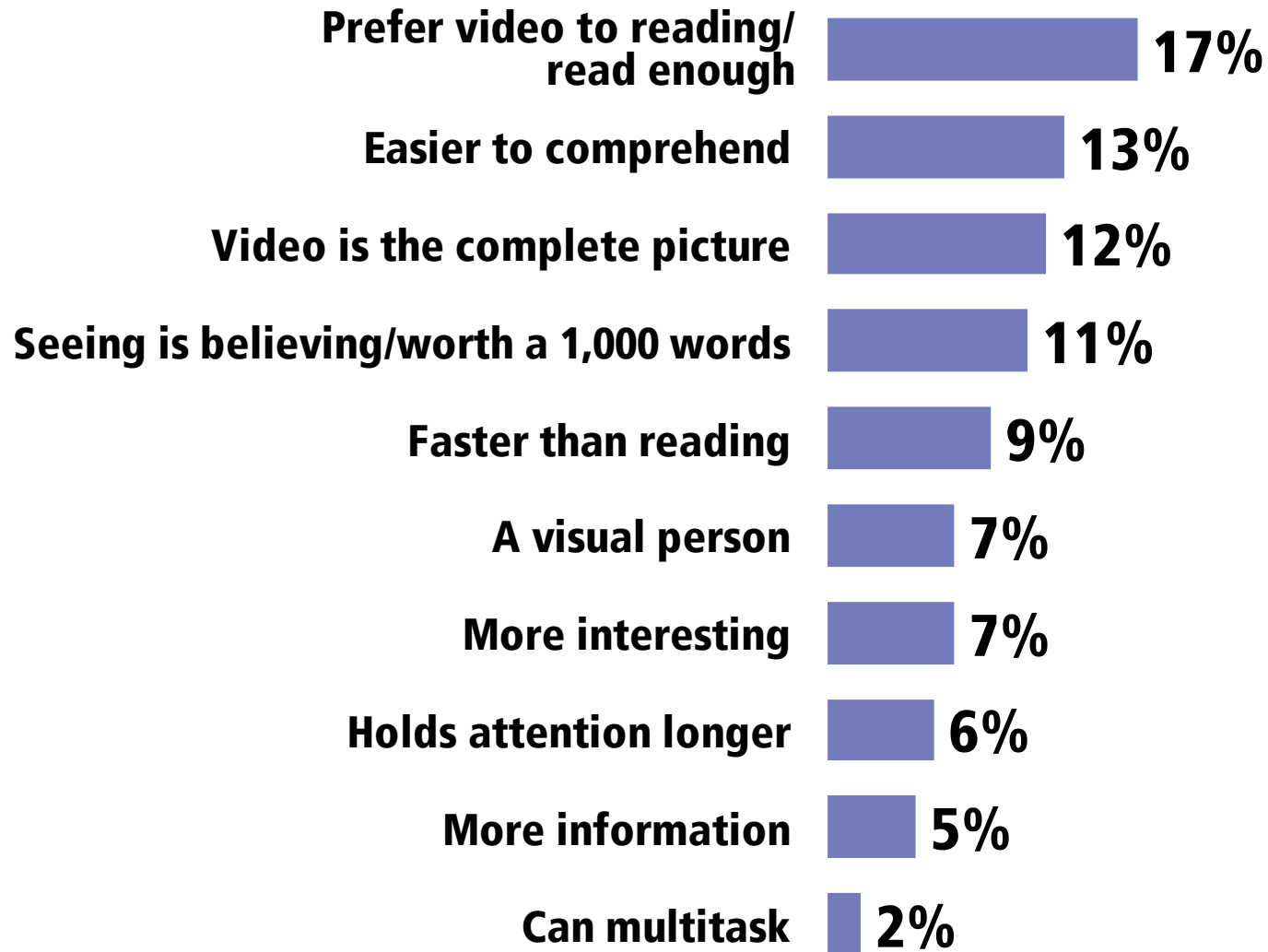
OPEN-ENDED RESPONSES CATEGORIZED



Base: Total Online Canada 18+, excluding none/don't know responses

WHY PREFER VIDEO MOSTLY

OPEN-ENDED RESPONSES CATEGORIZED



Base: Total Online Canada 18+, excluding none/don't know responses

APPENDIX

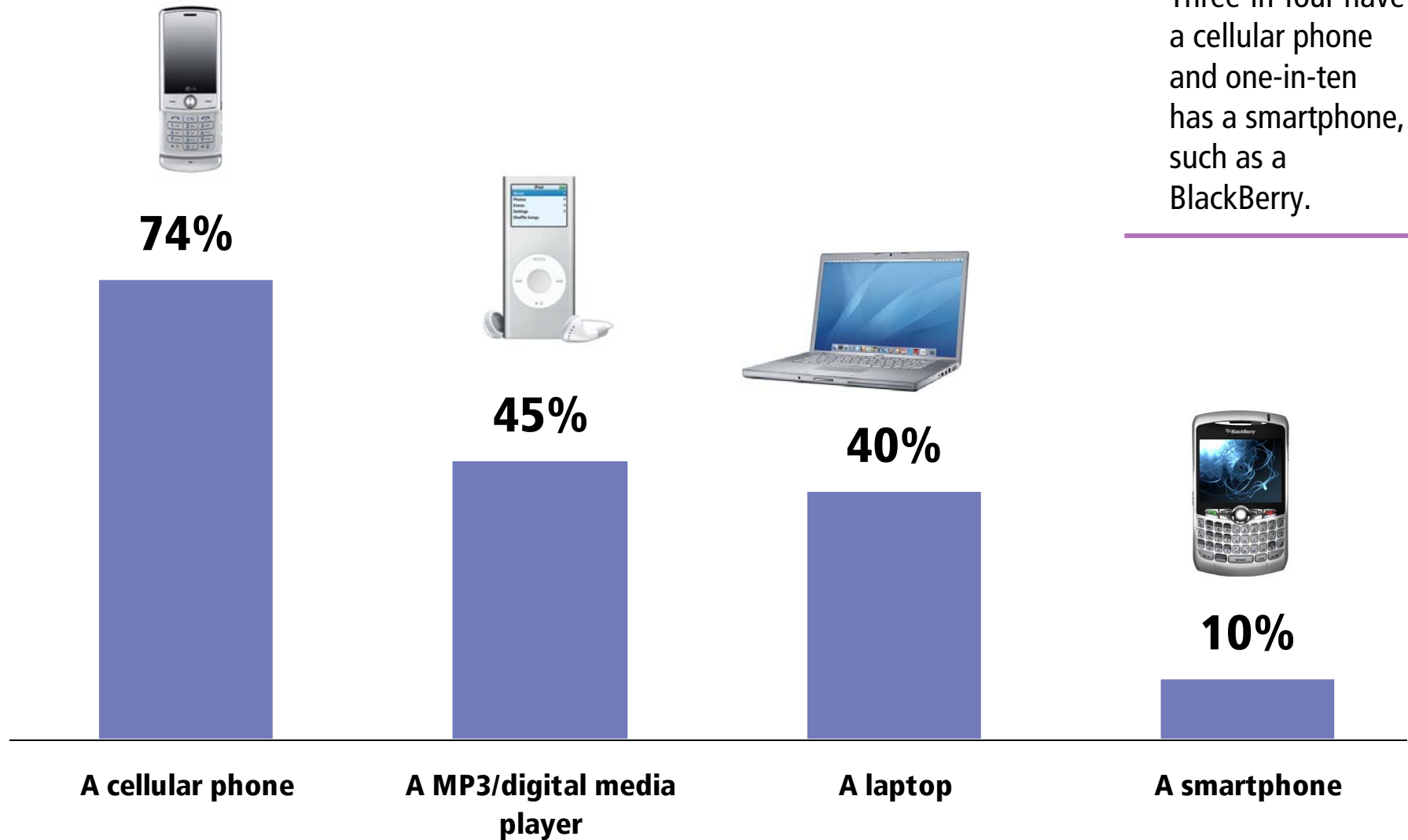


MOBILE TECHNOLOGY USE

*3-in-4 online Canadians have a wireless device—
Smartphones are used 1-in-10.*

MOBILE TECHNOLOGIES AMONG ONLINE CANADIANS

- Three-in-four have a cellular phone and one-in-ten has a smartphone, such as a BlackBerry.



Base: Total Online Canada 18+

MOBILE TECHNOLOGY USE

BY AGE GROUP	18-29	30-44	45-59	60+
	%	%	%	%
A cellular phone	77	80	72	65
A MP3/digital media player	67	58	34	19
A laptop	52	46	34	28
A smartphone	11	14	8	4



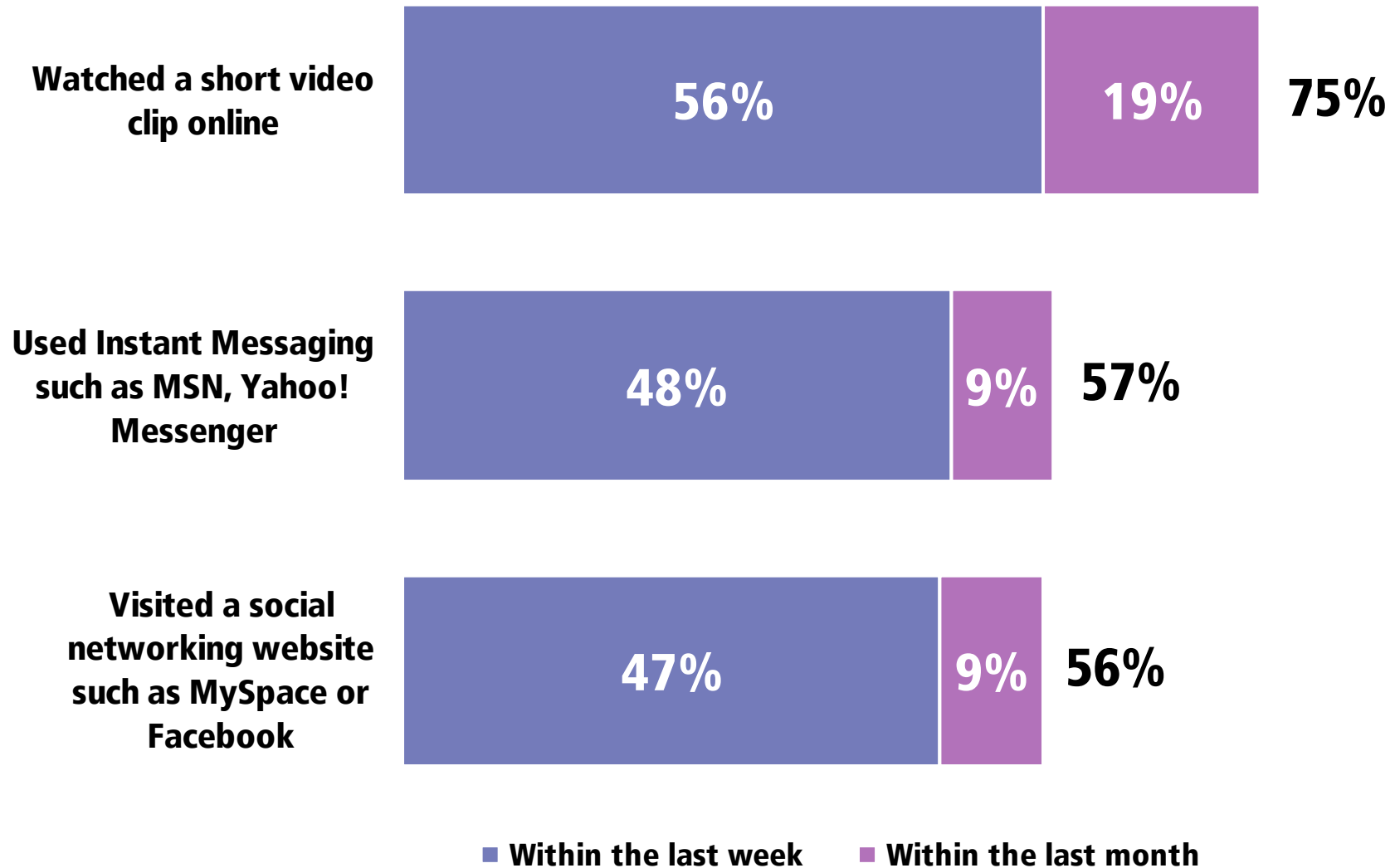
Base: Total Online Canada 18+



ONLINE VIDEO, SOCIAL MEDIA

Both online video and social media are mainstream.

WHEN WAS THE LAST TIME YOU DID EACH OF THE FOLLOWING?



Base: Total Online Canada 18+

WHEN WAS THE LAST TIME YOU DID THE EACH OF THE FOLLOWING?

WITHIN THE LAST MONTH



%



%

MEN VS. WOMEN

Watched a short video clip online	77	73
Used Instant Messaging such as MSN, Yahoo! Messenger	55	59
Visited a social networking website such as MySpace or Facebook	50	61

Base: Total Online Canada 18+

WHEN WAS THE LAST TIME YOU DID THE EACH OF THE FOLLOWING?

WITHIN THE LAST MONTH

BY AGE GROUP	18-29	30-44	45-59	60+
	%	%	%	%
Watched a short video clip online	84	77	73	67
Used Instant Messaging such as MSN, Yahoo! Messenger	77	61	52	39
Visited a social networking website such as MySpace or Facebook	80	64	48	33

Base: Total Online Canada 18+

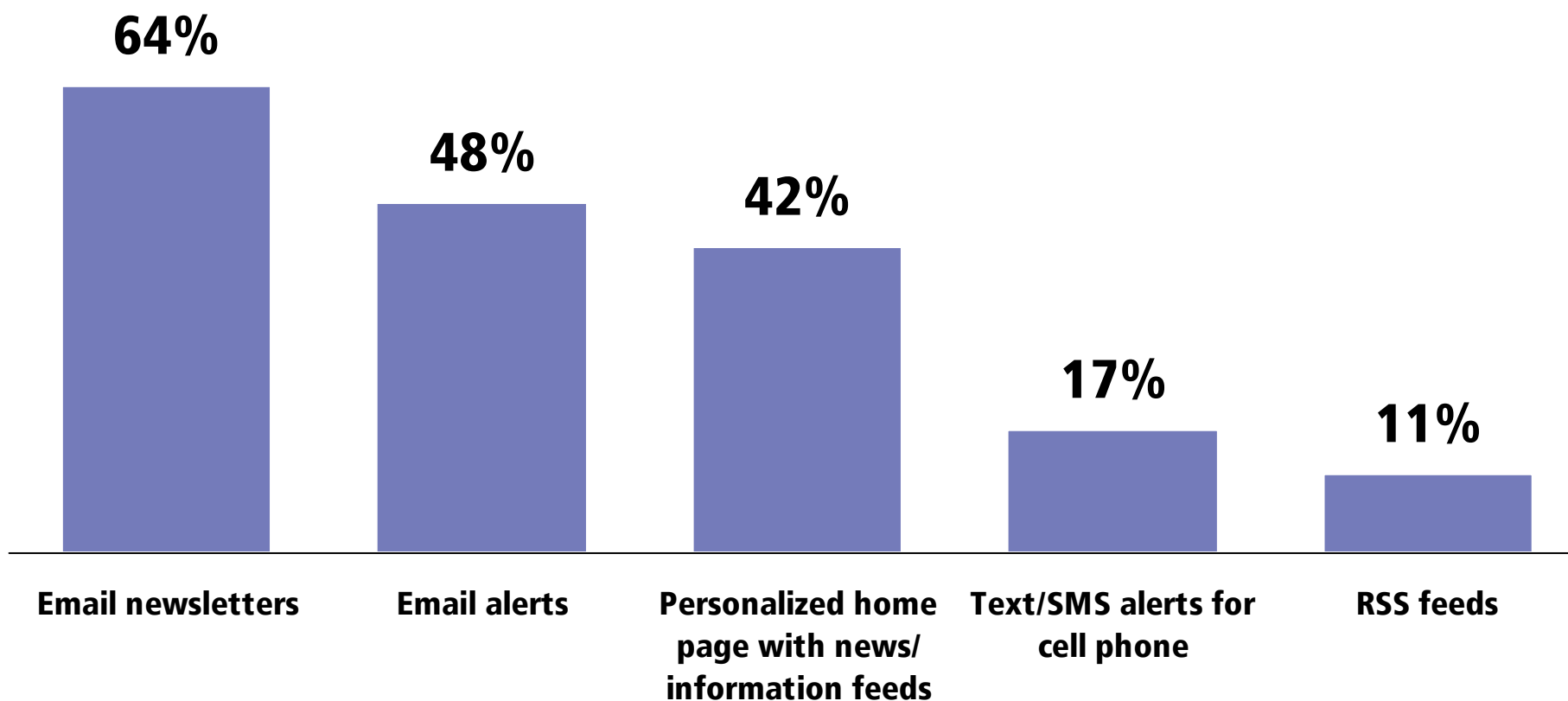
ONLINE AND MOBILE NEWS AND ALERTS



*Email newsletters and alerts are popular generally—
RSS feeds and SMS alerts are more likely to be used by
18-44 year olds.*

HAVE YOU USED THE FOLLOWING WAYS TO GET NEWS/INFORMATION...

% USED BEFORE



Base: Total Online Canada 18+

HAVE YOU USED THE FOLLOWING WAYS TO GET NEWS/INFORMATION...

% USED BEFORE



%



%

MEN VS. WOMEN

	Men %	Women %
Email newsletters	65	63
Email alerts	50	46
Personalized home page with news/information feeds	41	43
Text/SMS alerts for cell phone	19	14
RSS feeds	16	7

Base: Total Online Canada 18+

HAVE YOU USED THE FOLLOWING WAYS TO GET NEWS/INFORMATION...

% USED BEFORE

BY AGE GROUP	18-29	30-44	45-59	60+
	%	%	%	%
Email newsletters	58	63	65	71
Email alerts	43	49	48	52
Personalized home page with news/information feeds	41	44	42	41
Text/SMS alerts for cell phone	28	22	12	4
RSS feeds	15	15	7	8

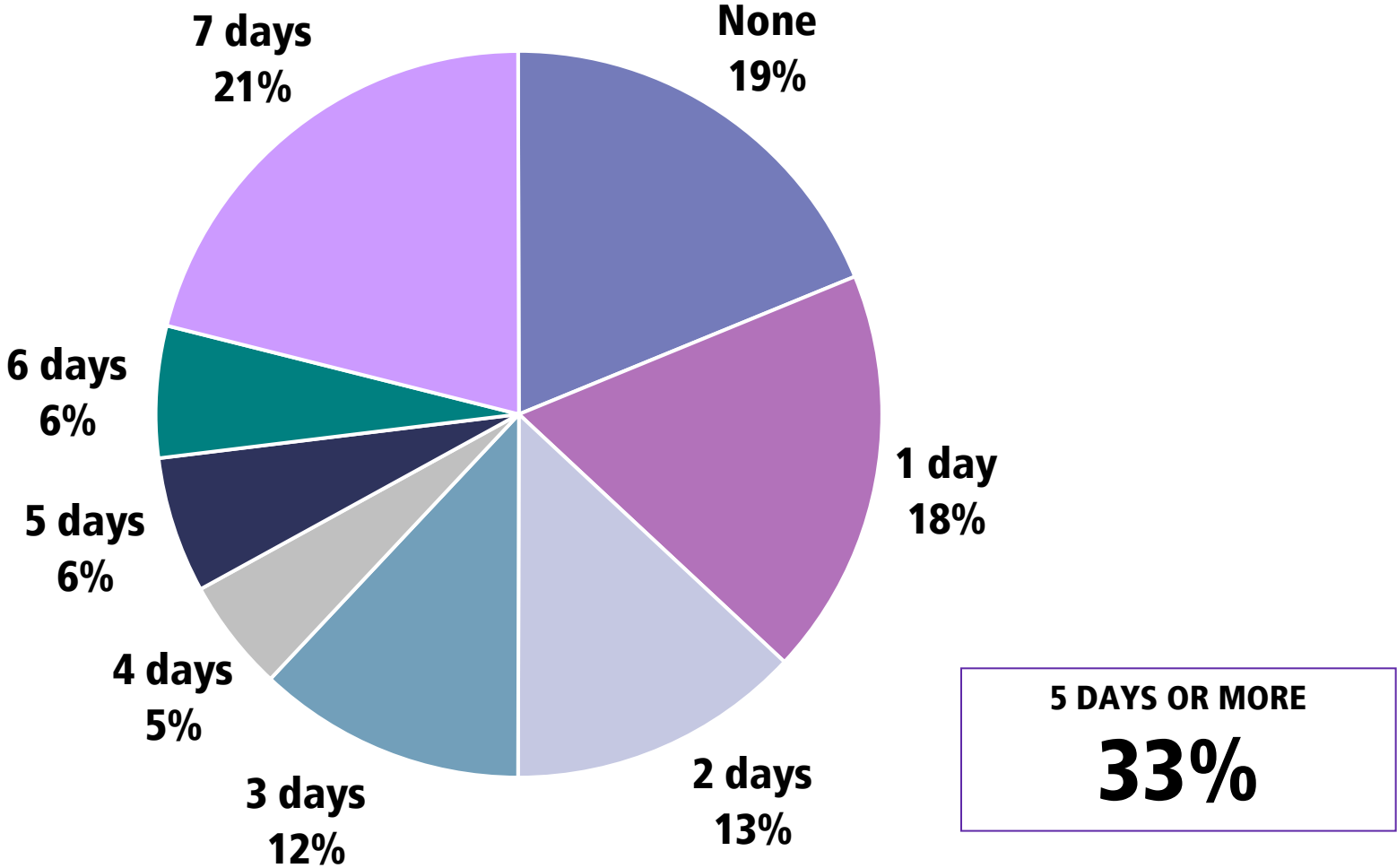
Base: Total Online Canada 18+



TRADITIONAL MEDIA USE

No big surprises – however, newspaper readership and TV news consumption skew significantly older in general.

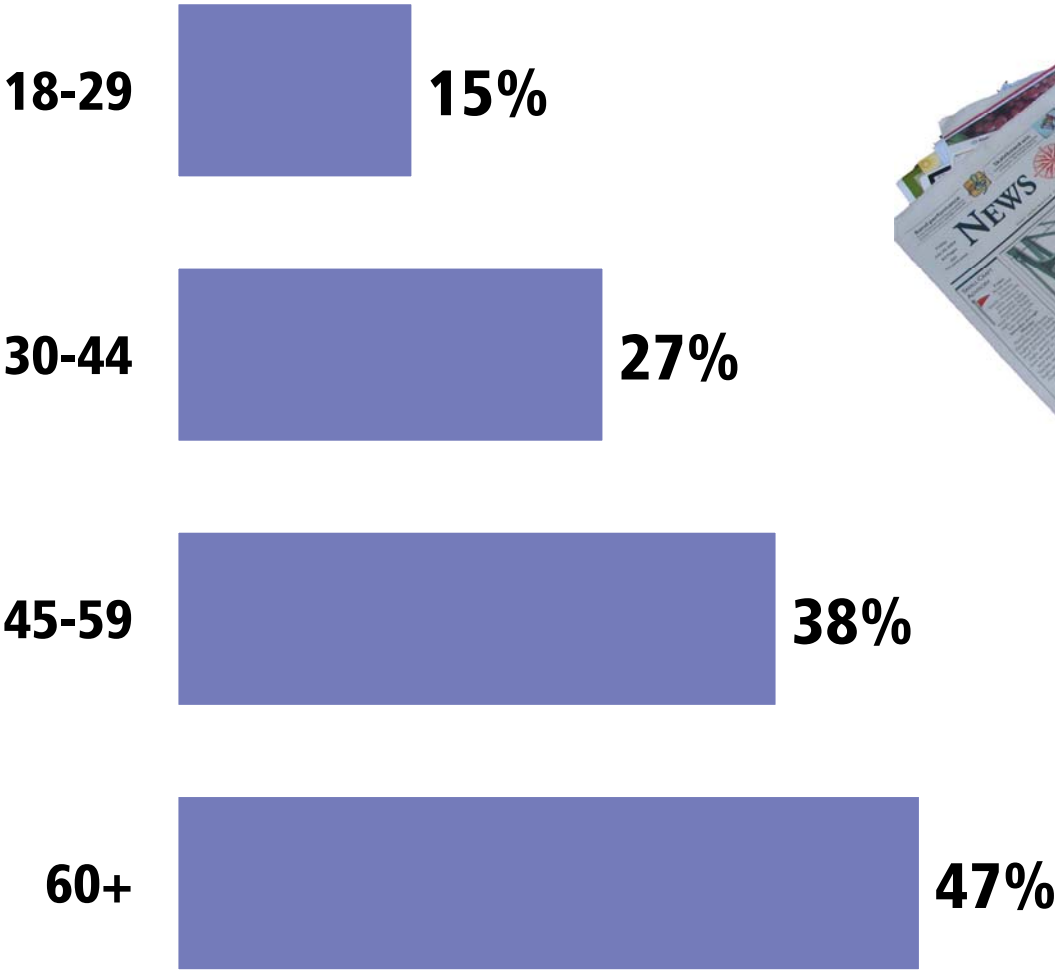
HOW MANY DAYS, IF ANY, DID YOU READ/LOOK INTO A NEWSPAPER IN THE LAST 7 DAYS?



Base: Total Online Canada 18+

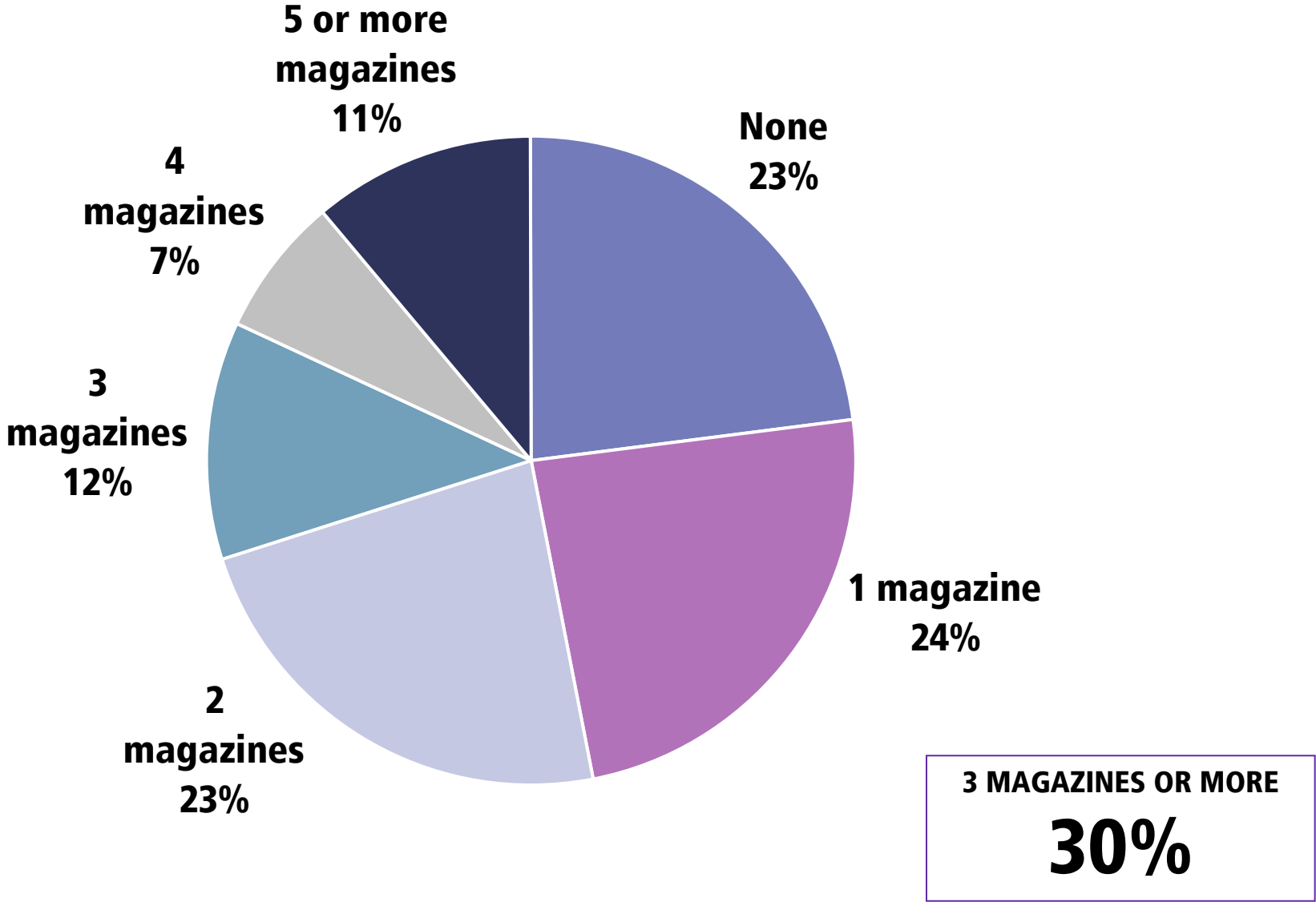
HOW MANY DAYS, IF ANY, DID YOU READ/LOOK INTO A NEWSPAPER IN THE LAST 7 DAYS?

BY AGE GROUP
5 DAYS OR MORE



Base: Total Online Canada 18+

HOW MANY MAGAZINES, IF ANY, DID YOU READ/LOOK INTO IN THE PAST MONTH?

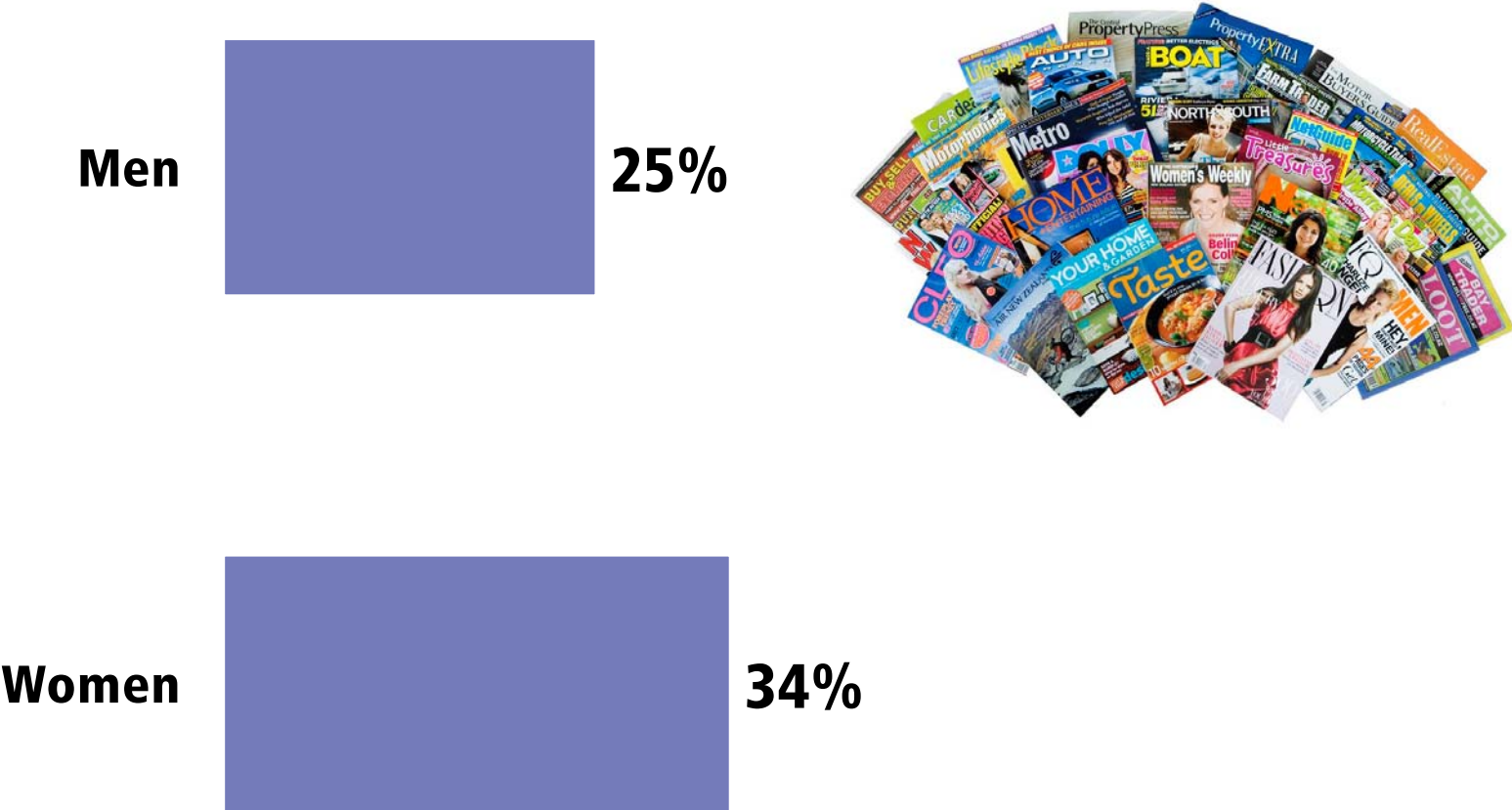


Base: Total Online Canada 18+

HOW MANY MAGAZINES, IF ANY, DID YOU READ/LOOK INTO IN THE PAST MONTH?

MEN VS. WOMEN

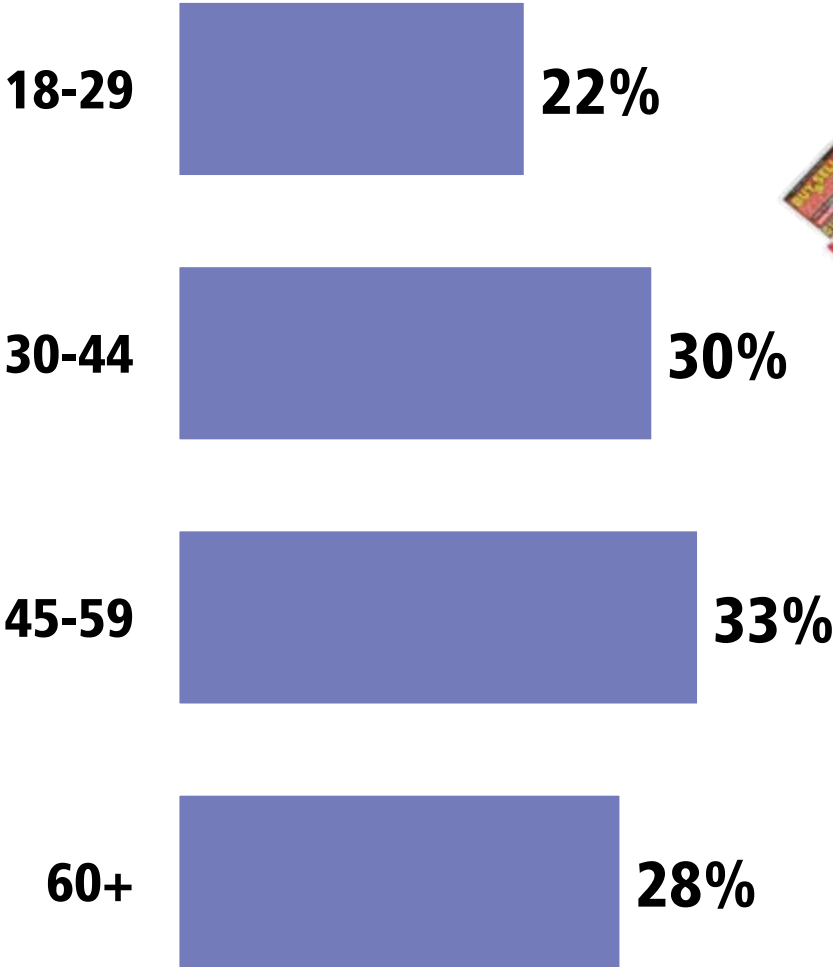
3 MAGAZINES OR MORE



Base: Total Online Canada 18+

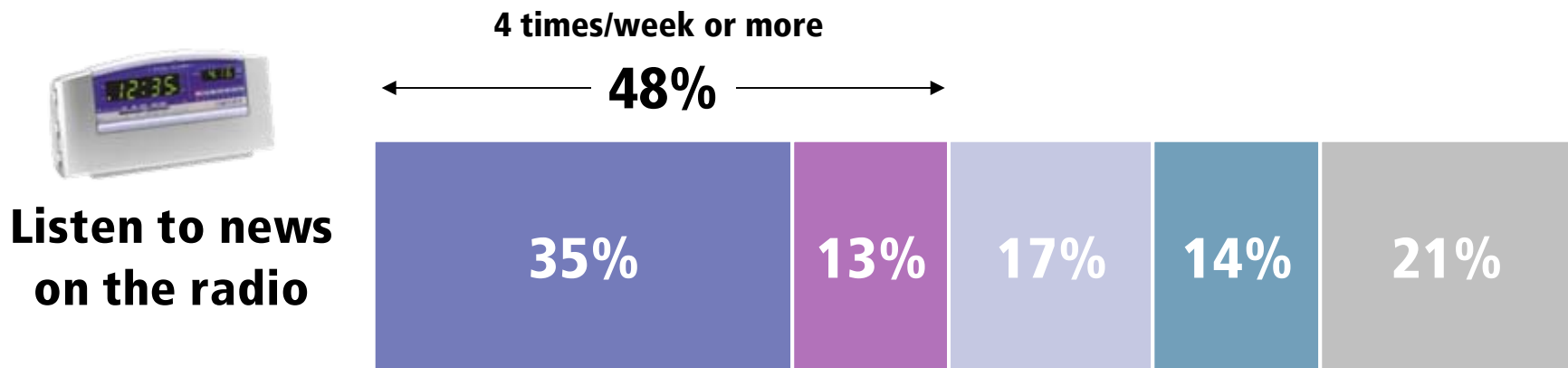
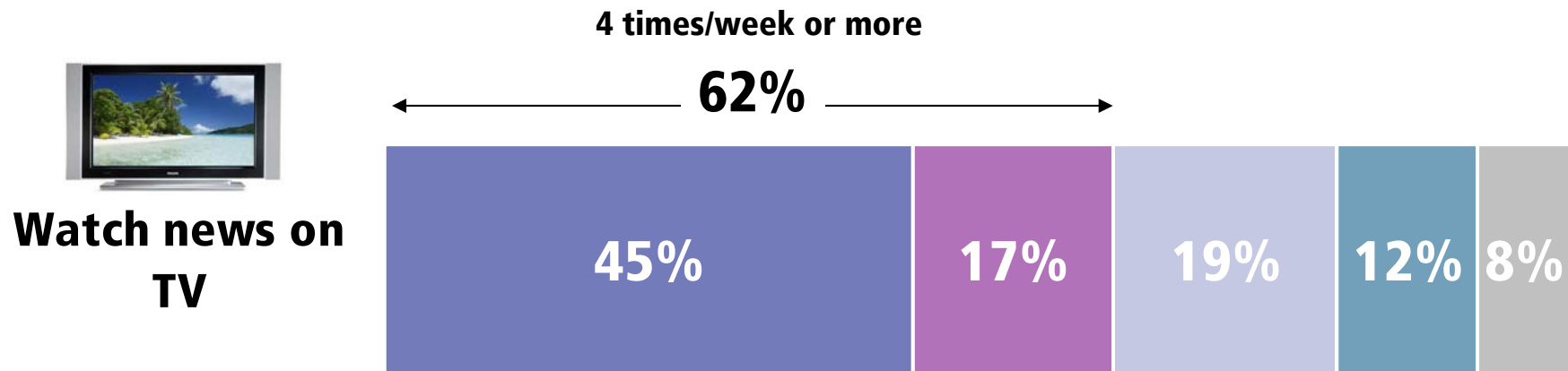
HOW MANY MAGAZINES, IF ANY, DID YOU READ/LOOK INTO IN THE PAST MONTH?

BY AGE GROUP 3 MAGAZINES OR MORE



Base: Total Online Canada 18+

NEWS CONSUMPTION ON TV/RADIO PAST WEEK



■ Daily ■ 4-5 times/week ■ 2-3 times/week ■ Once ■ Not at all

Base: Total Online Canada 18+

NEWS CONSUMPTION ON TV/RADIO PAST WEEK

MEN VS. WOMEN

4 TIMES A WEEK OR MORE



WATCH NEWS ON TV



LISTEN TO NEWS ON THE RADIO

Men



65%

Men



50%

Women



59%

Women



46%

Base: Total Online Canada 18+

NEWS CONSUMPTION ON TV/RADIO PAST WEEK

BY AGE GROUP

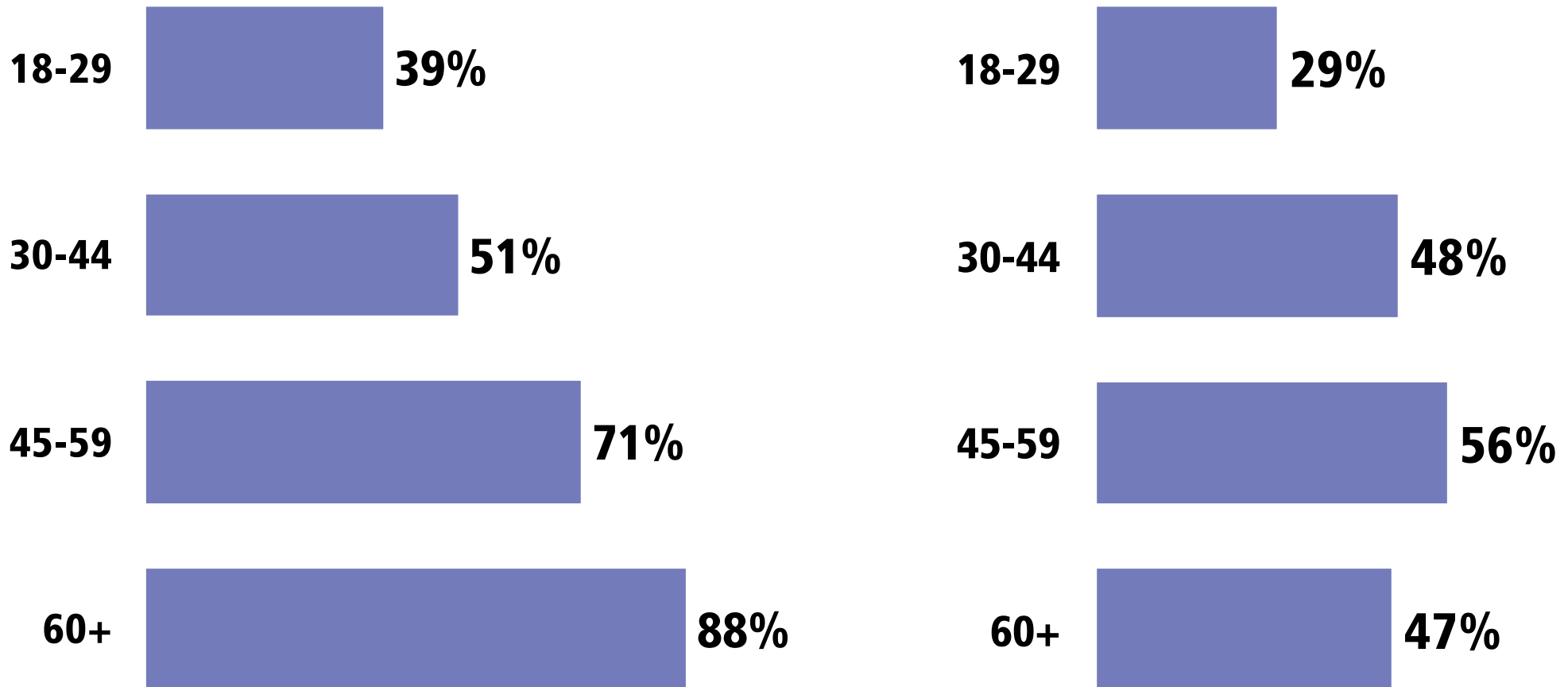
4 TIMES A WEEK OR MORE



WATCH NEWS ON TV



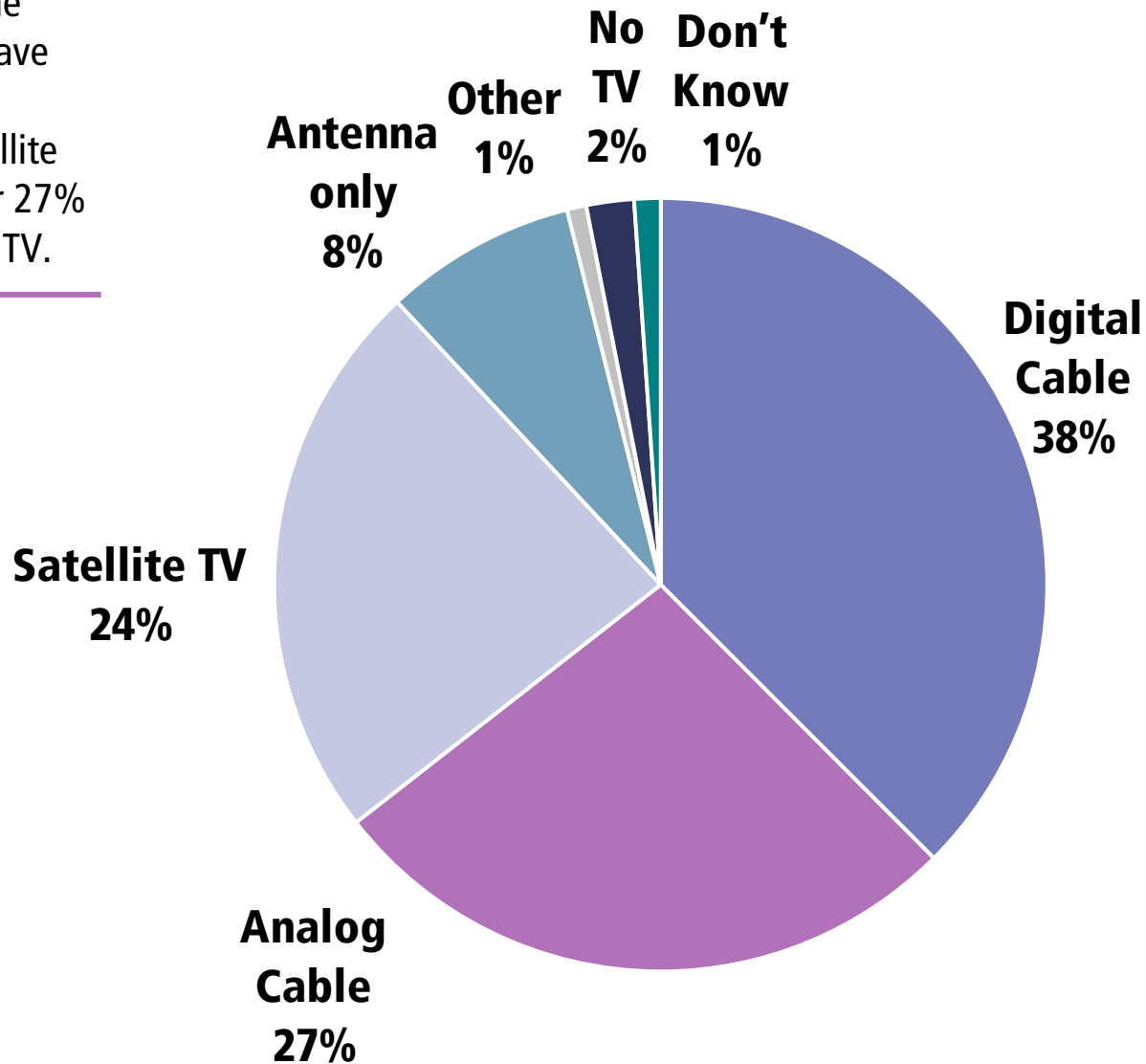
LISTEN TO NEWS ON THE RADIO



Base: Total Online Canada 18+

CABLE/SATELLITE TV IN THE HOME

- 62% of online Canadians have either digital cable or satellite TV—another 27% have analog TV.



Base: Total Online Canada 18+



FASTFORWARD 
QUARTERLY

diversity
IN CANADA

DIGITAL LIFE AMERICA

To find out more, contact us via
www.srgnet.com or call David Ackerman at **1.866.358.5986** ext. 25

