December 23, 2009

The State Of Consumers And Technology: Benchmark 2009, Canada

by Charles S. Golvin and Jackie Anderson
for Consumer Market Research Professionals

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Includes data from Consumer Technographics®

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A Life Stage Analysis Of The Canadian Benchmark Survey

EXECUTIVE SUMMARY

This is a graphical analysis of the Canadian consumer market based on Forrester's North American Technographics® Benchmark Survey, 2009 (US, Canada). It describes the current state of device and service adoption, and it provides an overview of Canadian consumers' demographics, behaviors, and technology attitudes by life stage. The data shows that adults younger than 40 now devote more time to new media than to traditional media, that households with multiple PCs outnumber those with a single PC, and that more than one-third of those who access the Net on a mobile phone do so on a BlackBerry.

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TECHNOLOGY ADOPTION DIFFERS WITH AGE AND FAMILY STATUS

We have completed a generational analysis of the 5,625 Canada-based respondents to our 2009 North American benchmark survey. The headline is simple: Consumers of all ages and family situations continue to incorporate technology more and more deeply into their daily lives. Through the past 11 years of large-scale benchmark surveys, we've observed digital technology take an increasing role in consumers' lives. Today, technologies like PCs and mobile phones that were once for the most well-heeled tech freaks are in at least three-quarters of Canadian households. Thirty-eight percent of households now have a high-definition television (HDTV), and more than two in five own multiple PCs. And consumers of every generation continue to move an increasing amount of their time and attention away from offline channels. Our analysis of four different life stage groups shows that:

- **Young singles and couples are the most connected.** Those younger than 40 whose sole responsibility is themselves or their partner represent 1.6 million Canadian households and 6.2 million adults, of whom 89% are online. These consumers are avid adopters of personal technology like laptops and are the most likely to own a smartphone or a mobile phone that supports rich media like music or video. Young singles and couples live a large part of their lives online, from interacting with social networking sites to watching video, and they are the most likely to take the Net with them: They are 92% more likely to access the Web on their phone than the average Canadian mobile-phone-toting adult.

- **Young families are heavy tech users, especially for shared experiences.** Those younger than 40 with children at home younger than 18 comprise 2.3 million Canadian households and 3.5 million adults, 92% of whom are regular Net users. These young families are highly wired and buy shared technology that has some payoff for the kids, which is why HDTVs, DVD players, and game consoles are most prevalent in these households. For their personal use, these consumers have nearly as strong an affinity for the latest and greatest in mobile as the young singles and couples — they are the most likely to own a mobile phone, nearly two-thirds of them have a camera phone, and more than one in three own a phone that plays music.

- **Older families are straddling multiple worlds.** Those 40 years and older with kids younger than 18 in the house represent 2.4 million households but just 3.1 million adults. They are no Luddites: 88% of them are online, and their Net usage, uniquely, is more heavily weighted toward work than home. Nearly seven in 10 older families have broadband — second only to young singles and couples — and they have by far the most PCs per household, on average. Their individual technology purchases tend toward utility, leading all other groups in MP3 player, handheld gaming, and portable GPS ownership. Yet these consumers spend as much time each week with new media as they do with traditional media sources.

- **Older singles and couples use technology more surgically.** This gigantic group of consumers ages 40 and older who are either empty-nesters or did not have children consists of 6.7 million households and 13.4 million adults, only 61% of whom are online. These consumers tend toward technologies and services that provide obvious benefit and convenience, such as eCommerce: Older singles and couples have long been shopping online, although they spent less in the previous three months than any other group.

A Couple Of Things To Note Before Getting Started

Two points will help you interpret the insights in this report:

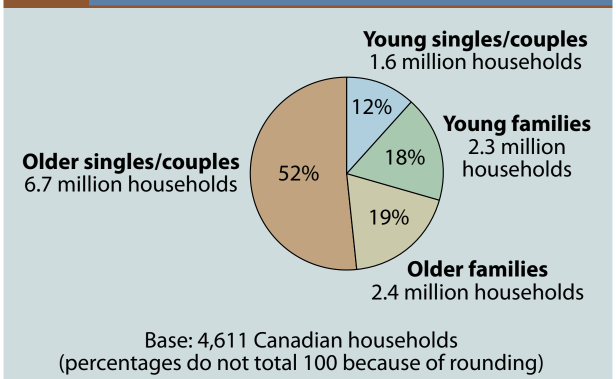
1. For the third consecutive year, our 2009 benchmark survey is representative of Canadian adults (18 and older) as well as Canadian households (heads of household). In general, we use a base of adults for personal technologies and behaviors: for example, for laptops, mobile data activities, and online behavior. We use a base of households for household technologies and behaviors like broadband or paid television services. Please pay close attention to the base in each figure.

2. We did a life stage analysis of the benchmark data in this report. But because the data is in a database of survey responses with more than 1,400 questions, we can also replicate these findings for any consumer group: for example, by gender; income category; a particular brand segment; or a group defined by demographics, behavior, and/or attitudes.

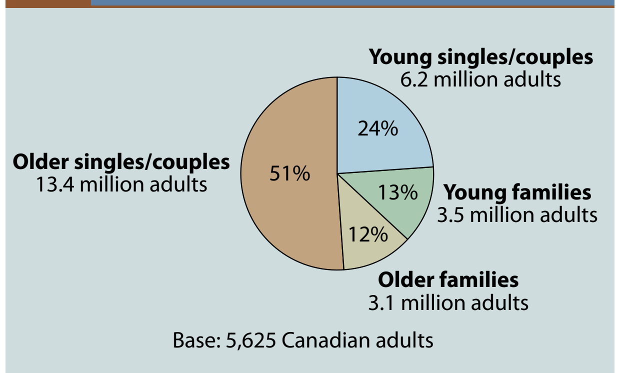
TECH ADOPTION DIFFERS WITH AGE AND FAMILY STATUS

Age and the presence of children in the household have distinct influences on Canadian consumers' adoption of technology and their attitudes. Those younger than 40 opt for digital technologies and mobility, such as music-playing mobile phones; are more open to advertising; and rely on social connections for purchase advice. Consumers with kids take to technologies like game consoles that provide shared entertainment.

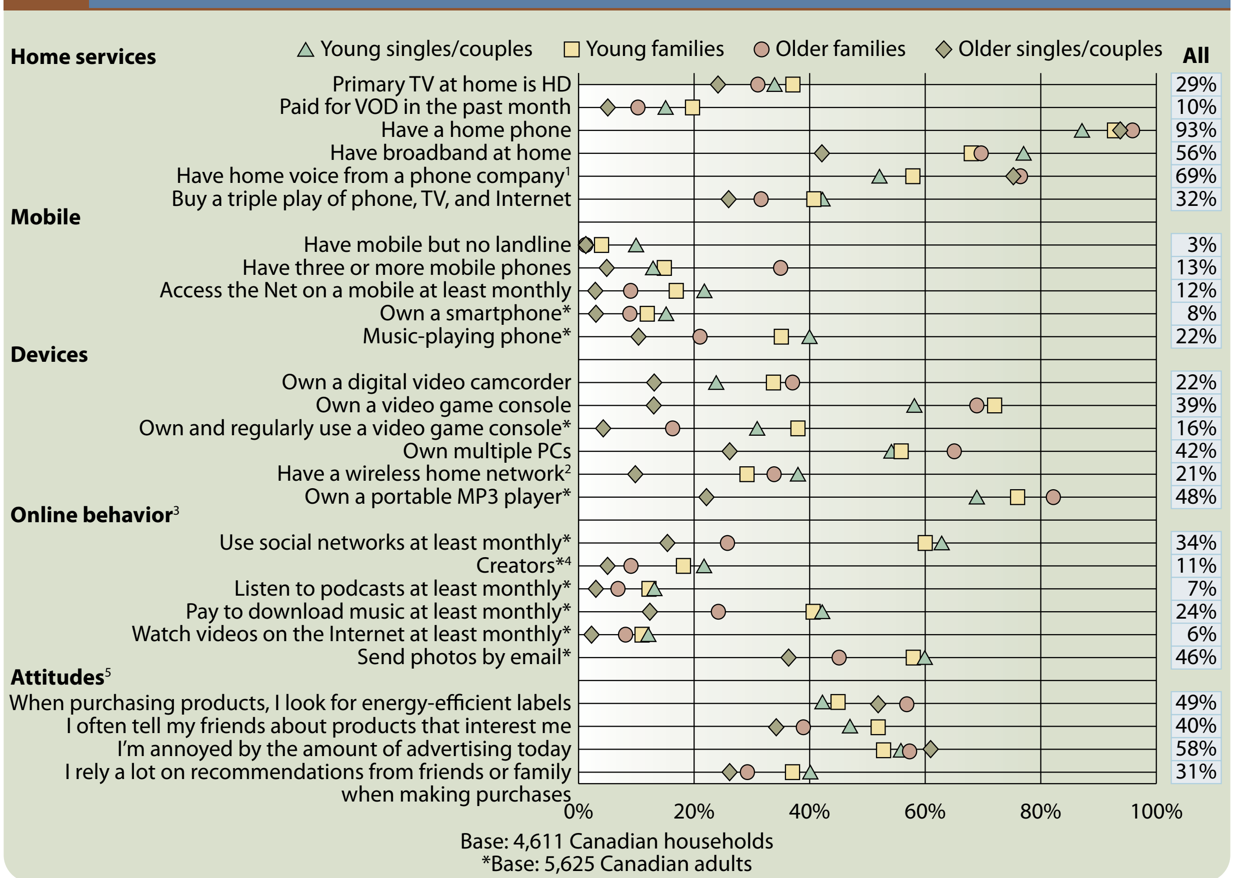
1-1 Three In 10 Households Are Younger Than 40



1-2 Nearly Two In Three Adults Are At Least 40



1-3 Technology Adoption And Behavior Vary With Life Stage

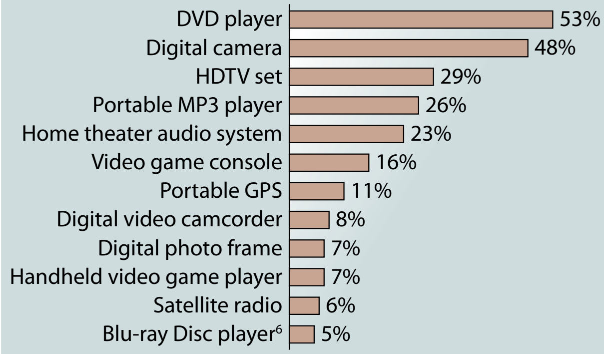


DEVICES: FAMILIES LEAD THE GADGET CHARGE

Families — both young and old — are the most enthusiastic adopters of technology, both for the household and for their personal use. PC ownership reaches an impressive 94% among families, and more than two in five Canadian households own at least two. The devices that really over-index in households with children are entertainment devices like game consoles or handheld game players and devices like video camcorders or digital cameras that commemorate events. Young families lead in HDTV and home theater adoption, creating environments for shared entertainment experiences. A majority of those younger than 40 own a laptop or an MP3 player, but personal devices — even portable navigation devices — hold little appeal to older singles and couples. Young singles and couples are the most avid adopters of richly featured mobile phones.

2-1 Only DVD Players Are Used By A Majority

"Which of these devices do you regularly use?"

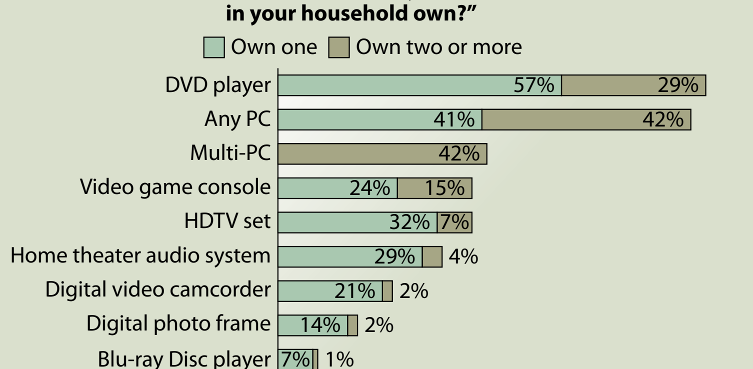


Base: 5,625 Canadian adults

2-2 Families Are The Most Avid Technology Adopters Of Household Devices[7]

A spreadsheet with additional data is available online.

"Which of these devices do you or someone in your household own?"



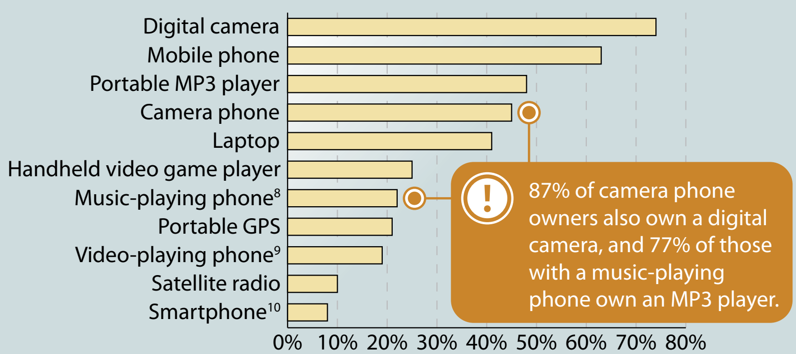
Own at least one

	Young singles/ couples	Young families	Older families	Older singles/ couples
DVD player	91%	94%	94%	79%
Any PC	93%	96%	97%	71%
Multi-PC	54%	56%	65%	26%
Video game console	58%	72%	69%	13%
HDTV set	42%	48%	43%	32%
Home theater audio system	44%	54%	37%	22%
Digital video camcorder	24%	34%	37%	13%
Digital photo frame	16%	16%	18%	15%
Blu-ray Disc player	13%	12%	11%	4%

Base: 4,611 Canadian households

2-3 Nearly Half Of All Adults Have A Laptop, And Almost As Many Have An MP3 Player

"Which of these devices do you own?"



	Young singles/ couples	Young families	Older families	Older singles/ couples
Digital camera	84%	91%	90%	62%
Mobile phone	75%	79%	70%	51%
Portable MP3 player	69%	76%	82%	22%
Camera phone	66%	63%	51%	29%
Laptop	57%	54%	53%	27%
Handheld video game player	27%	50%	62%	9%
Music-playing phone[8]	40%	35%	21%	10%
Portable GPS	22%	24%	27%	18%
Video-playing phone[9]	34%	29%	19%	9%
Satellite radio	10%	14%	11%	8%
Smartphone[10]	15%	12%	9%	3%

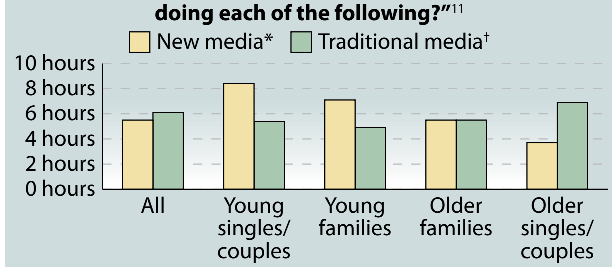
Base: 5,625 Canadian adults

MEDIA: OLDER FAMILIES STRADDLE OLD AND NEW MEDIA

Consumers' time is almost split evenly between new and traditional media sources. In fact, local newspapers still rank as the No. 1 overall media source for the general Canadian population. But while traditional media still dominates among older consumers, younger consumers spend far more time engaged with the Internet. This mix of time spent with media drives the cross-channel usage seen among such sites as The Weather Channel, the Food Network, Fox, CBC, and CNN. Young singles/couples and young families' love for the Internet is exemplified by the emergence of Facebook in their top media channels. More than half of both groups (and more than 60% of young singles) are logging into Facebook at least weekly.

3-1 New Media Use Surpasses Traditional Media For Young Families And Singles

"In a typical week, how many hours do you spend doing each of the following?"[11]

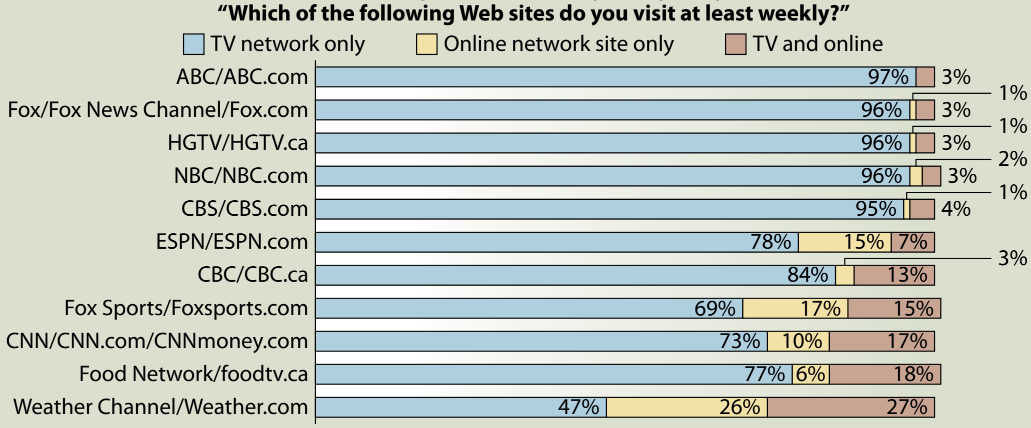


Base: 4,611 Canadian adults

*New media: Internet use for personal and work purposes
†Traditional media: TV, radio, magazines, and newspapers (print)

3-2 More Than One-Fourth Of Weather Channel Viewers Engage With The Brand On- And Offline

"Which of the following TV channels do you regularly watch on TV?"
"Which of the following Web sites do you visit at least weekly?"

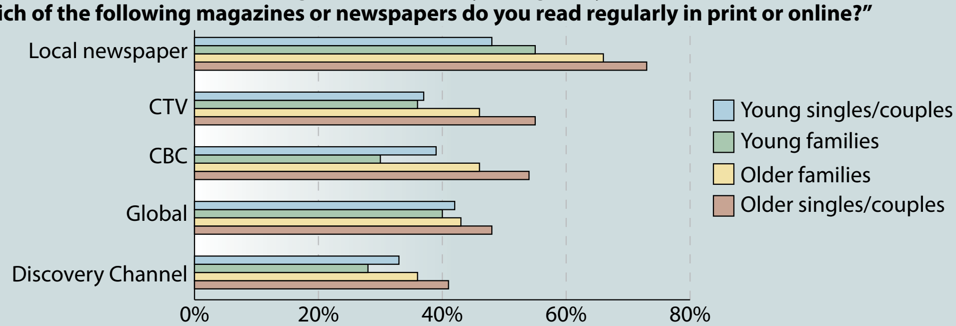


Base: Canadian online adults who consume each media brand
(percentages may not total 100 because of rounding)

3-3 Unlike In The US, Canadian Top Media Usage Isn't Limited To The Networks

A spreadsheet with additional data is available online.

"Which of the following Web sites do you visit at least weekly?"
"Which of the following TV channels do you regularly watch on TV?"
"Which of the following magazines or newspapers do you read regularly in print or online?"

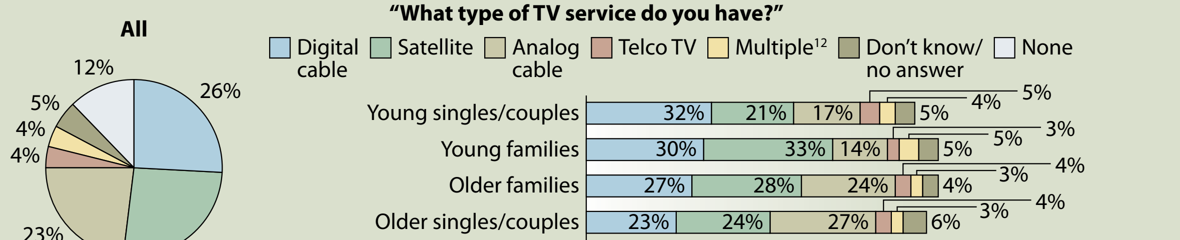


Base: 5,625 Canadian online adults

TELEVISION: FAMILIES GO FOR DIGITAL

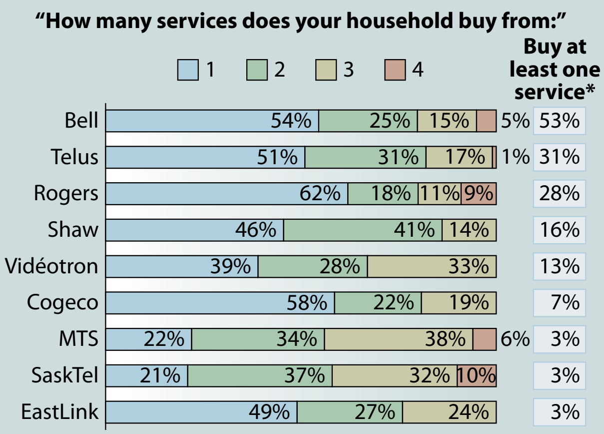
While digital television households — led by young families — are now the majority in Canada, nearly one-quarter of households still rely on analog cable. Young singles and couples show the greatest inclination to shift their TV viewing online, but young families far outstrip all other life stage groups when it comes to paying for video on demand (VOD). Few Canadians express a burning desire to get a DVR or high-definition programming.

4-1 Young Singles And Couples Are Most Likely To Eschew TV Service



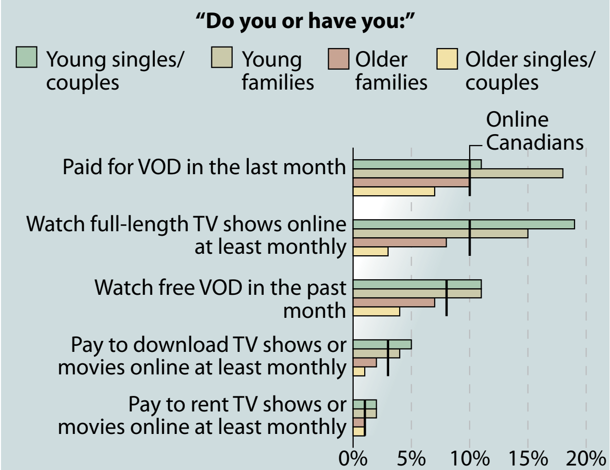
Base: 4,611 Canadian households
(percentages may not total 100 because of rounding)

4-2 MTS And SaskTel Are The Best Bundlers



Base: Canadian households that buy at least one service from each carrier
*Base: 4,611 Canadian households

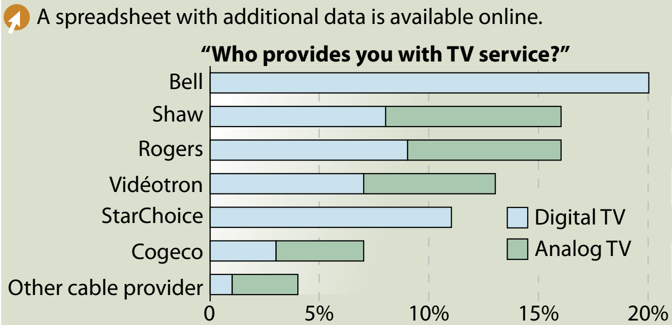
4-3 Online Video Is Denting VOD



Base: 4,225 Canadian online adults

4-4 One-Fifth Of Households Get Their TV From Bell

A spreadsheet with additional data is available online.



	Want DVR*	Want HD*	Pay for VOD*[13]	Watch free VOD*[14]
Bell	4%	7%	13%	3%
Shaw	3%	6%	13%	4%
Rogers	3%	5%	13%	13%
Vidéotron	0%	3%	14%	19%
StarChoice	3%	2%	11%	3%
Cogeco	2%	5%	9%	14%
Other cable provider	2%	7%	4%	3%

Base: 4,000 Canadian households with TV service
*Base: Canadian households with a TV that get service from each provider

ONLINE: YOUNG CONSUMERS GO ONLINE IN MORE PLACES

When it comes to the Internet, it's young singles who are dominating every aspect. From the total amount of time spent online to where they log in online to the adoption of all activities, young singles and couples have the lead. The list and adoption of online activities continues to grow, but adoption rates vary heavily by group. For example, more than one-third of young families have signed up for free products, compared with just 19% of older families. In the US, older singles/couples drive online spending, but this group of Canadians spends the least online. Spending is almost evenly distributed among the other three segments.

5-1 Young Singles/Couples Log The Most Hours Online

"In a typical week, how many hours do you spend doing each of the following?"[15]

	Using the Internet for personal purposes	Using the Internet for work purposes	Total hours
All	6.4	4.6	11.0
Young singles/couples	10.0	6.9	16.9
Young families	8.8	5.3	14.2
Older families	5.4	5.7	11.1
Older singles/couples	4.3	3.1	7.4

Base: 5,447 Canadian online adults

5-2 Home Is Still By Far The Most Popular Place To Log On

"Where do you go online?"

	All	Young singles/ couples	Young families	Older families	Older singles/ couples
Home	87%	90%	93%	91%	81%
Work	42%	51%	44%	54%	31%
School	6%	13%	11%	3%	1%
Hotel	5%	8%	7%	5%	3%
Library	5%	9%	6%	3%	3%
Airport	2%	4%	2%	2%	2%
Outdoors	2%	4%	4%	1%	1%
Restaurant/coffee shop	2%	5%	3%	1%	1%
Internet café	2%	4%	2%	1%	2%
Somewhere else	6%	7%	7%	3%	5%

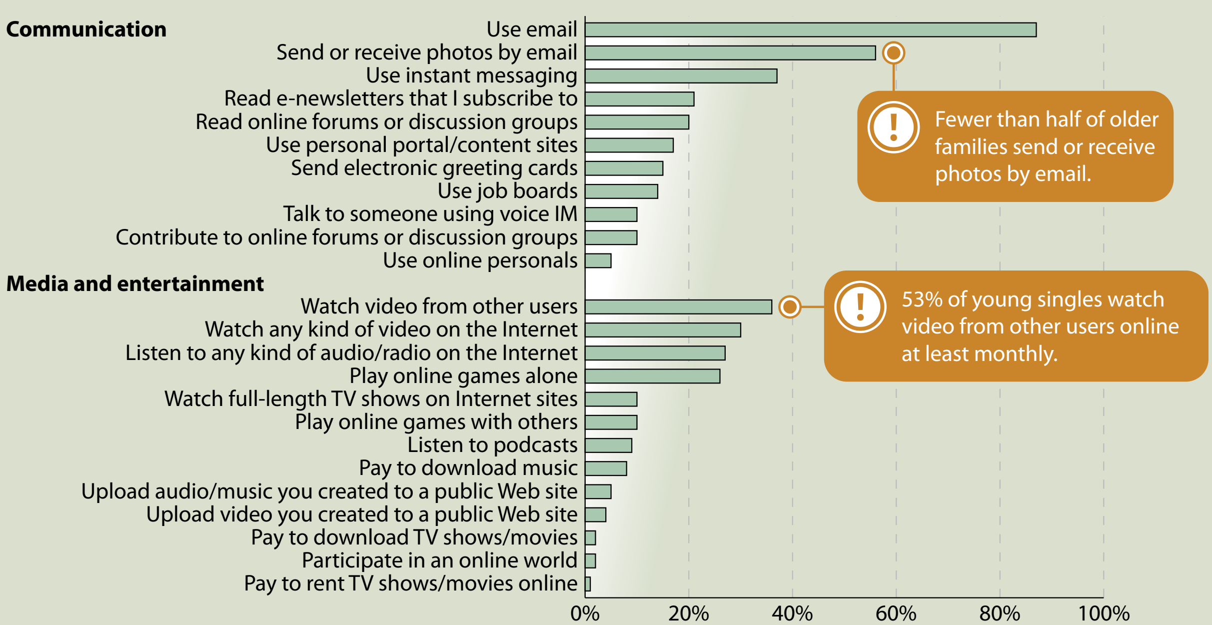
60% of mobile Internet users also log on at work.

Base: 4,621 Canadian online adults

5-3 Young Singles Lead In All Online Activities

A spreadsheet with additional data is available online.

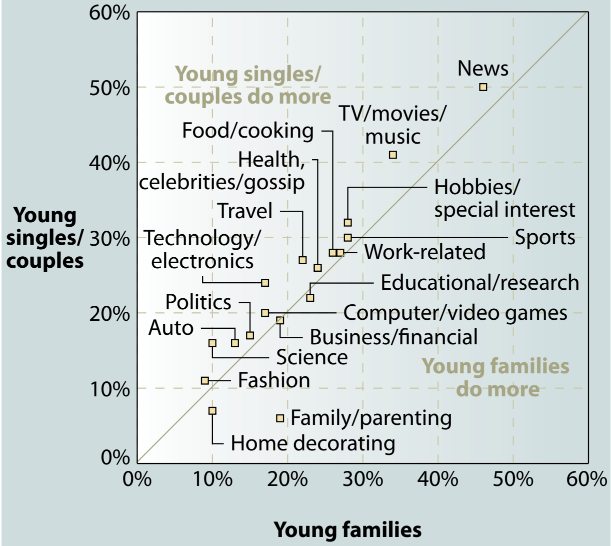
"Which of the following activities do you do online at least monthly?"[16]



Base: 4,621 Canadian online adults

5-4 Young Singles And Families Check Out Different Topics Online

"Which of the following topics do you read about on the Internet at least weekly?"

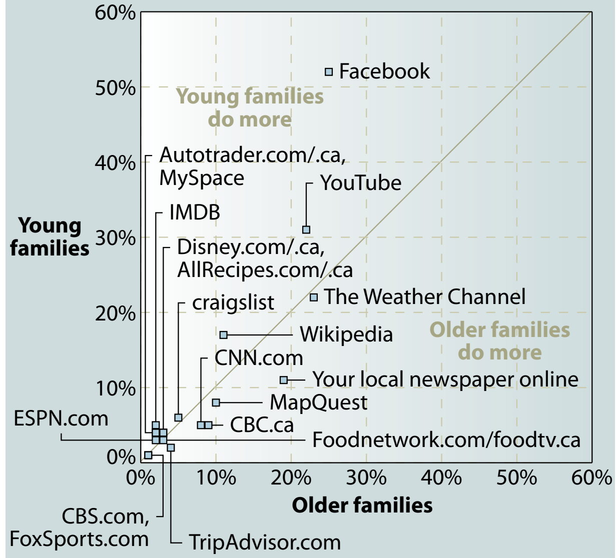


Base: 4,621 Canadian online adults

5-5 Age Is A Bigger Driver For Site Visits Than The Existence Of Family

A spreadsheet with additional data is available online.

"Which of the following Web sites do you visit at least weekly?"[17]



Base: 4,621 Canadian online adults

5-6 Almost One-Fourth Of Online Consumers Sign Up To Receive Free Products

"Which of the following online activities do you do at least monthly?"

One-third of young singles/couples are purchasing products online.

Base: 4,621 Canadian online adults

5-7 The Tenure For Online Shoppers Is Similar, But Families Are Spending More Online

"When did you start purchasing products or services online?"

	All	Young singles/ couples	Young families	Older families	Older singles/ couples
Online retail tenure (years)	4.0	4.0	3.8	4.2	4.1

"In total, how much have you spent online in the past three months (actually paid for the product or service online)?"[18]

	All	Young singles/ couples	Young families	Older families	Older singles/ couples
Average online spend in the past three months	C$495	C$515	C$525	C$533	C$446

The most popular category purchased online was books. Thirty-four percent of Canadians have made this type of purchase online.

Base: 4,621 Canadian online adults

MARKETING: YOUNG SINGLES AND COUPLES DIG SOCIAL

Social networks are a huge piece of the social media puzzle for Canadian young singles/couples and young families, even more so than for their US counterparts. But it doesn't stop there. Young Canadians are heavily engaged with social media across the board, from the one-fourth who are creating content to the almost three-fourths who have joined a social networking site.

While young families are the most likely to agree that price is more important than brand name, older families are the most likely to be willing to buy something on credit rather than wait. Younger consumers are more likely to be using word of mouth when it comes to products — both to tell friends about what they like and to get recommendations from others. This involvement in word-of-mouth engagements is also seen in their social media use. Twenty-six percent of young singles and couples and 21% of young families are sharing their opinions about brands, products, and companies online through social media activities such as posting ratings and reviews.

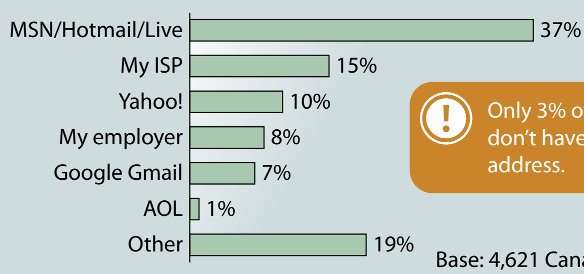
6-1 Young Singles Lead The Social Technographics® Rankings[19]

	Young singles/ couples	Young families	Older families	Older singles/ couples
Creators 15%	25%	19%	10%	8%
Critics 15%	26%	21%	8%	9%
Collectors 12%	20%	18%	5%	6%
Joiners 45%	72%	66%	31%	24%
Spectators 53%	72%	63%	45%	38%
Inactives 33%	13%	17%	40%	51%

Base: 4,621 Canadian online adults

6-2 MSN/Hotmail/Live Is Most Popular Across All Groups

"Who provides your primary email address?"



	Young singles/ couples	Young families	Older families	Older singles/ couples
MSN/Hotmail/Live	54%	49%	25%	25%
My ISP	8%	14%	23%	18%
Yahoo!	11%	11%	9%	9%
My employer	7%	8%	12%	8%
Google Gmail	10%	6%	5%	6%
AOL	1%	0%	1%	1%
Other	11%	14%	23%	25%

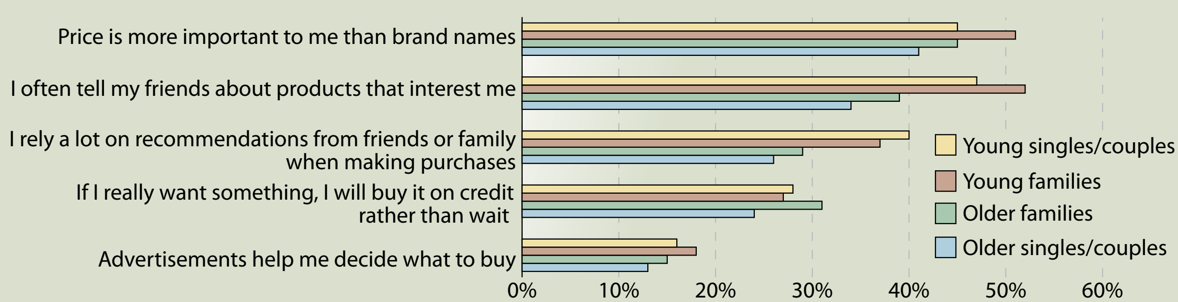
Only 3% of respondents don't have an email address.

Base: 4,621 Canadian online adults

6-3 Young Singles Listen To Their Friends, While Young Families Spread The Word

A spreadsheet with additional data is available online.

"Please indicate how strongly you agree or disagree with the following statements."[20]
(4 or 5 on a scale of 1 [strongly disagree] to 5 [strongly agree])



Base: 5,625 Canadian adults

THE PC MARKET: FAMILIES DOMINATE IN DESKTOPS

The average family is likely to have two or more PCs, and older families have the most PCs per household. Mobile computing, in the form of a laptop, appeals more to both older families and young singles and couples. Dell dominates in desktops, with market share 50% greater than second-place HP and Acer; HP runs neck and neck in laptop market share with Dell. Apple gained market share in 2008 — in desktops, not laptops. All life stage groups continue to tempt fate: Fewer than one-third back up their files, while barely half scan for malware.

7-1 Older Families Have The Most PCs

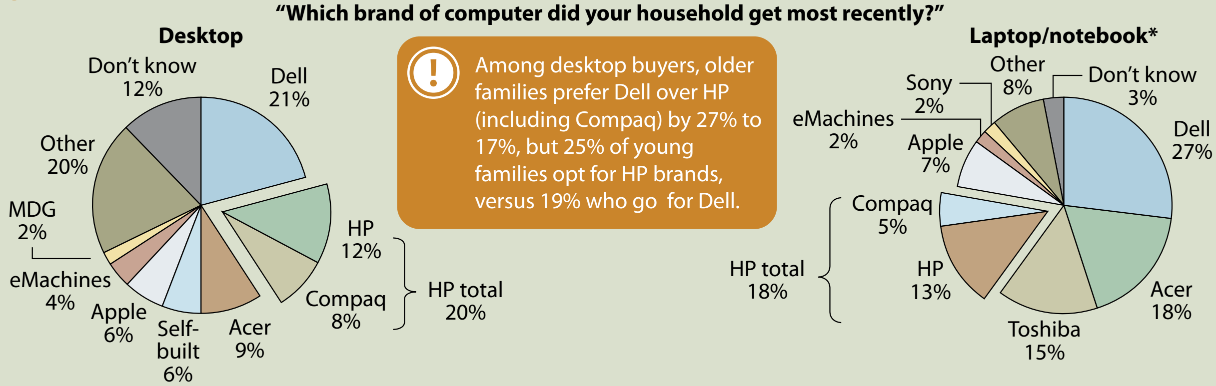
Own:	All	Young singles/ couples	Young families	Older families	Older singles/ couples
Desktop PC	74%	73%	86%	94%	62%
Laptop PC	42%	62%	53%	57%	28%
Any PC	83%	93%	96%	97%	71%
Multiple PCs	42%	54%	56%	64%	26%
Mean No. of PCs	1.6	1.9	1.9	2.3	1.1

Base: 4,611 Canadian households

7-2 Dell Leads In Laptops But Is Neck And Neck With HP In Desktops

A spreadsheet with additional data is available online.

"Which brand of computer did your household get most recently?"

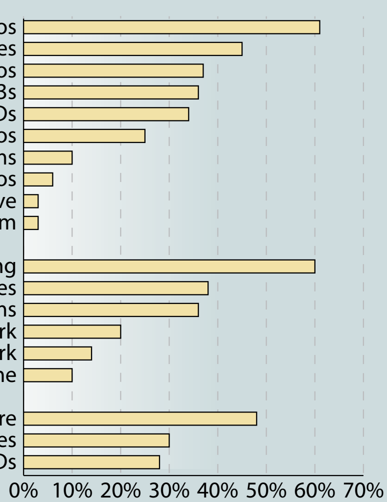


Base: 2,255 Canadian households whose most recent PC purchase was a desktop of identified brand
*Base: 1,233 Canadian households whose most recent PC purchase was a laptop of identified brand

7-3 Young Families Do More With Their PCs

A spreadsheet with additional data is available online.

"Which of the following activities do you regularly use a home computer for, whether for business or personal use?"



	Young singles/ couples	Young families	Older families	Older singles/ couples
Media activities				
View/manage personal photos	72%	78%	60%	50%
Play free computer games	47%	53%	46%	41%
Edit personal photos	48%	49%	32%	29%
Store/listen to MP3s	59%	56%	40%	14%
Write (burn) audio CDs	49%	50%	35%	20%
Print personal photos	23%	28%	22%	25%
Watch live TV programs	17%	14%	8%	5%
Edit videos	10%	8%	7%	2%
Record TV programs to a hard drive	8%	4%	2%	1%
Record video with a Webcam	6%	4%	3%	2%
Productivity activities				
Word processing	69%	65%	62%	52%
Manage personal or family finances/taxes	42%	44%	41%	32%
Use spreadsheet programs	45%	40%	37%	29%
Do/help with homework	24%	35%	44%	5%
Connect to/access employer's network	17%	14%	20%	10%
Help run business conducted from your home	10%	12%	10%	10%
PC management activities				
Scan for viruses, spyware, or adware	55%	53%	53%	40%
Back up files	34%	34%	30%	26%
Burn data CDs or DVDs	40%	34%	28%	20%

Base: 4,816 Canadian adults who own a PC

DIGITAL HOME: OLDER FAMILIES WIN "MOST WIRED" AWARD

Broadband households are now the majority among Canadian households, and excepting older singles and couples, more than two-thirds of households have an always-on Internet connection at home. These broadband connections are nearly 50% more likely to come from a cable provider than a telco, and consumers younger than 40 are more likely than older Canadians to extend the cable relationship to include voice.

Yet telecom providers have had more success in extending broadband connections to the rest of the home: DSL customers are more than 22% more likely to have a home network than households with a cable Internet connection. Canadians have cut the cord on their home networks: Three in four networks employ wireless connections.

8-1 Wireless And TV Top The Bill

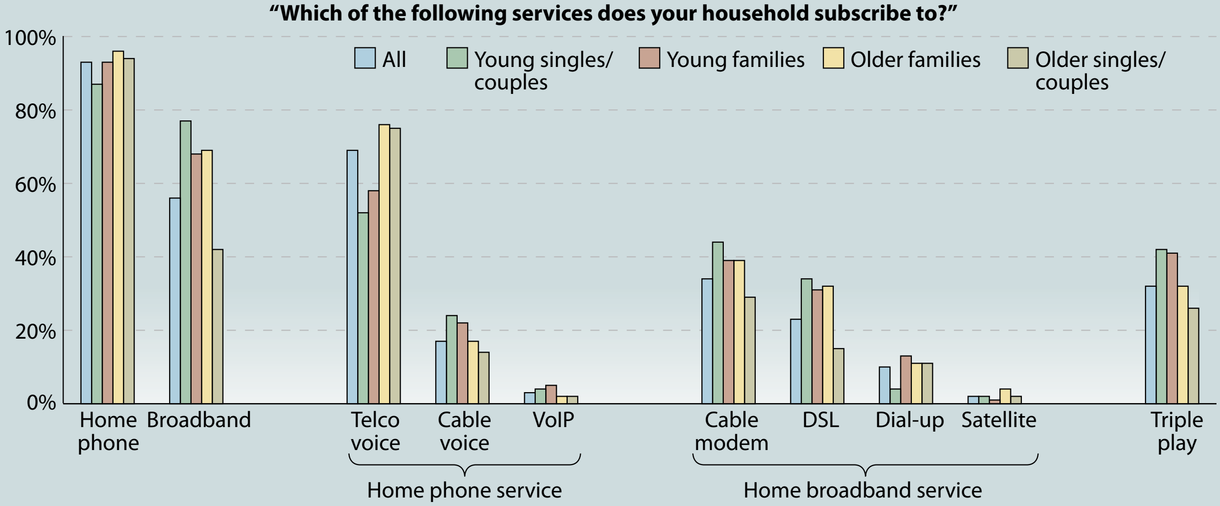
"How much does your household spend per month for:"

	All	**Young singles/ couples**	**Young families**	**Older families**	**Older singles/ couples**
Internet access	C$36	C$36	C$35	C$37	C$36
TV service	C$53	C$49	C$53	C$53	C$53
All cell phones	C$54	C$63	C$68	C$60	C$40
Home landline phones	C$42	C$38	C$41	C$44	C$43
Voice, Internet, and TV bundle	C$117	C$113	C$121	C$120	C$115

Base: Canadian households that pay for each service

8-2 Young Singles And Couples Are The Leading Adopters Of Cable Services

"Which of the following services does your household subscribe to?"

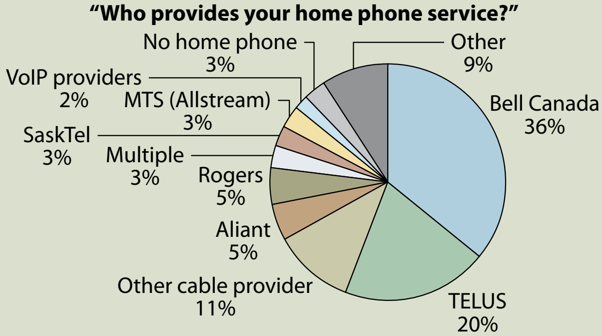


Base: 4,611 Canadian households

8-3 One In Six Voice Households Gets Service Via Cable

A spreadsheet with additional data is available online.

"Who provides your home phone service?"

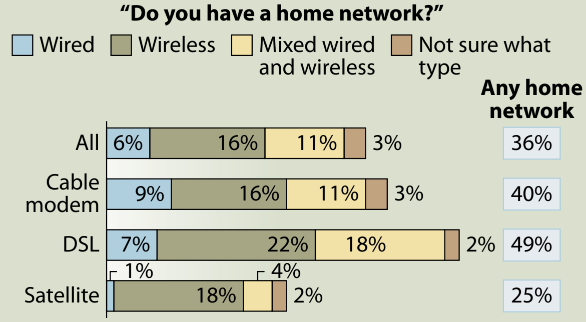


Base: 4,611 Canadian households

8-4 DSL Households Lead In Networking

A spreadsheet with additional data is available online.

"Do you have a home network?"



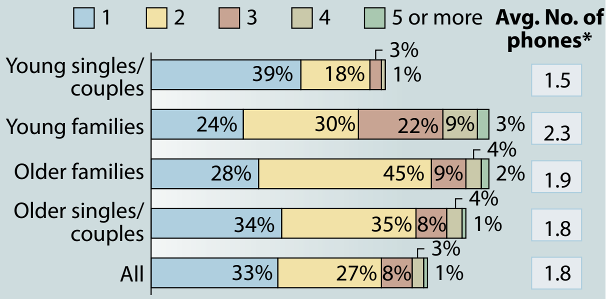
Base: 3,675 Canadian households with a home connection

MOBILE: OLDER FAMILIES HAVE THE MOST PHONES

Mobile phones are present in nearly three in four households. Penetration among families is approaching nine in 10, and the number of phones per household continues to rise: Only young singles and couples are most likely to have exactly one phone. A staggering 34% of regular mobile Internet users employ a BlackBerry, more than three times as many as use an iPhone. One in nine mobile subscribers accesses the Net on a phone regularly, led by 22% of young singles and couples, and nearly half of mobile Net users do so every day.

9-1 Seven In 10 Households Have Mobile

"How many active mobile phones are in your household?"



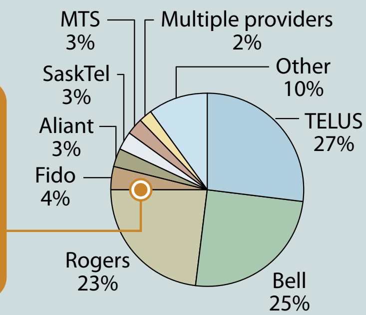
Base: 4,611 Canadian households
*Base: Canadian households with at least one mobile phone

9-2 Three Carriers Serve Four In Five Adults

A spreadsheet with additional data is available online.

"Who is the service provider for your primary cell phone?"

Among monthly mobile Net users, Rogers' share is 26% and Fido's is 9% — thanks, iPhone!

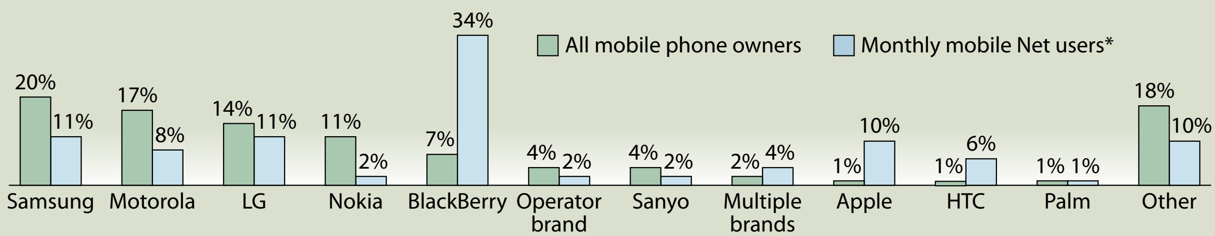


Base: 3,524 Canadian adults with a mobile phone

9-3 More Than One-Third Of Regular Mobile Net Users Use A BlackBerry

A spreadsheet with additional data is available online.

"Who makes the cell phone/smartphone you use the most?"



Base: 3,524 Canadian adults with a mobile phone
*Base: 410 Canadian adults with a mobile phone who access the mobile Net at least monthly

9-4 Young Singles And Couples Are The Most Advanced Mobile Users

A spreadsheet with additional data is available online.

"Do you do the following activities on a cell phone/smartphone or handheld wireless device at least monthly?"

		Young singles/ couples	Young families	Older families	Older singles/ couples
Send or receive text messages	40%	67%	55%	37%	17%
Send or receive email	14%	24%	17%	15%	6%
Play games	12%	22%	21%	7%	4%
Access the Internet	12%	22%	17%	9%	3%
Send or receive picture messages	10%	19%	18%	5%	3%
Use instant messaging	8%	16%	10%	4%	2%
Access my social network	7%	15%	12%	2%	1%
Search for information	6%	12%	9%	2%	3%
Access my carrier's Web portal	6%	11%	10%	2%	2%
Look up directions or maps	4%	10%	5%	3%	1%

43% of regular mobile Net users do so daily.

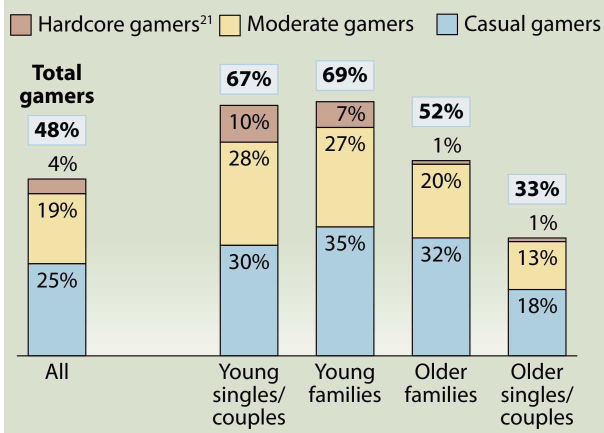
Base: 3,524 Canadian adults with their own mobile phone

GAMING: CONSOLES ARE FOR FAMILIES

Gaming is mainstream: Nearly half of all Canadian adults play games. While slightly more young families than young singles and couples play games, those without kids are 28% more likely to be hardcore gamers: self-identified enthusiasts who spend at least 10 hours per week playing games. In contrast, among the one-third of older singles and couples who game, the majority are casual gamers, those who don't pay for games and whose playing time fails to reach 1 hour per week. One in three older families are casual gamers.

Nintendo's Wii is the most prevalent console among families irrespective of age, evidence that the company's focus on entertainment for the entire family resonates with Canadian consumers. Older singles and couples are most likely to spend at least 10 hours per week PC gaming, and one in four gamers younger than 40 plays mobile games.

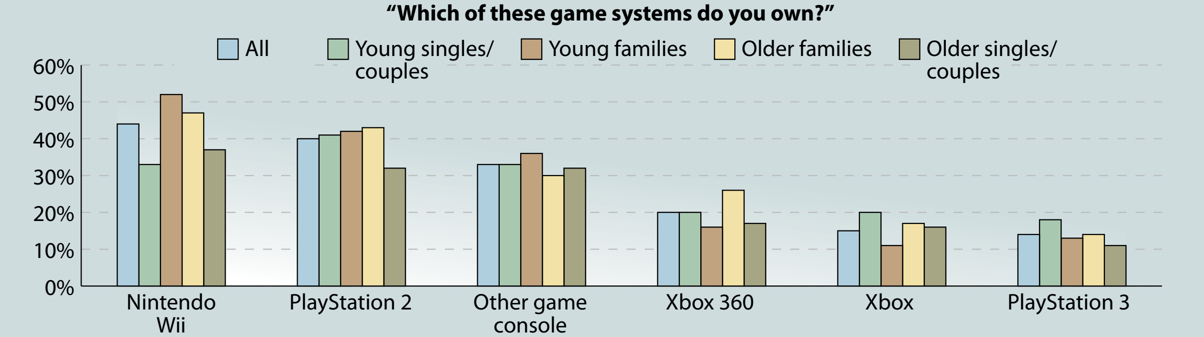
10-1 Half Of Older Families Are Gamers



Base: 5,625 Canadian adults
(numbers have been rounded)

10-2 Nintendo's Wii Is The Most Popular Of All Consoles

"Which of these game systems do you own?"



Base: 1,909 Canadian households that own a game console

10-3 Young Families Are The Most Likely To Have Recently Bought A Game

Percentage of each group who:		Young singles/ couples	Young families	Older families	Older singles/ couples
Regularly play free PC games	65%	62%	63%	71%	66%
Regularly play purchased PC games	44%	46%	44%	50%	40%
Read about games on the Internet weekly	26%	30%	28%	21%	21%
Spend at least 10 hours per week PC gaming	21%	22%	19%	15%	24%
Play games on a mobile phone at least monthly	16%	24%	24%	9%	5%
Play online games alone daily	12%	9%	10%	10%	17%
Spend at least 10 hours per week console or handheld gaming	10%	18%	11%	5%	4%
Purchased a video game in the past three months	9%	13%	12%	10%	4%
Bought a mobile phone game in the past six months	9%	13%	14%	6%	4%
Play online games with others daily	6%	6%	9%	4%	4%

Base: 1,820 Canadian adults who play games at least 1 hour per week

USING THE DATA: 4,611 HOUSEHOLDS, 5,625 ADULTS, MORE THAN 500 BRANDS

In addition to this format, the North American Consumer Technographics product is a rich data asset that Forrester clients may tap for market research, product planning, and go-to-market strategy assessment. The survey includes more than 1,400 data points and data on more than 500 brands.

SUPPLEMENTAL MATERIAL

Online Resource

The underlying spreadsheets available online for the figures in this document contain the data and information about the individual sample sizes.

Methodology

Forrester conducted a mail survey fielded in February and March 2009 of 53,668 US and Canadian households and individuals ages 18 and older. For results based on a randomly chosen sample of this size (N = 53,668), there is 95% confidence that the results have a statistical precision of plus or minus 0.4% of what they would be if the entire population of North American households and individuals ages 18 and older had been surveyed. Forrester weighted the US head of household data by age, gender, household income, household size and composition, education level, region, and market size (combined statistical area). The weighting criteria for the US individual respondent data included all of the above with the addition of employment status. The survey sample size, when weighted, was 45,156 North American respondents at the household level and 53,571 North American respondents at the individual level. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in mail panels.) The sample was drawn from members of TNS's panel, and respondents were motivated by a sweepstakes drawing. The sample provided by TNS is not a random sample. While individuals may have been randomly sampled from TNS's panel for this particular survey, they have previously chosen to take part in the TNS panel.

In addition to sampling error, one should bear in mind that the practical difficulties in conducting surveys can introduce error or bias into the findings of opinion polls. Other possible sources of error in polls are probably more serious than theoretical calculations of sampling error. These other potential sources of error include question wording, question ordering, and nonresponse. As with all survey research, it is impossible to quantify the errors that may result from these factors without an experimental control group, so we strongly caution against using the words "margin of error" in reporting any survey data.

These statements conform to the principles of disclosure of the National Council on Public Polls.

You can find more information about the data on the Survey & Data page online. From this page, you will be able to download the Survey Instrument.

ENDNOTES

[1] Those with a home phone line from a phone company are respondents who identified their home phone service as being provided by one of the following carriers: Aliant, Bell Canada, MTS (Allstream), SaskTel, or TELUS. The survey instrument included an option of "Other," and it is likely that this group includes households with phone service from one of the many smaller rural fixed telecom operators; however, such respondents are not included in those with a home phone line from a phone company.

[2] A household has a wireless home network if it has a home network that uses wireless technology; note that such a network could, in addition, employ wired technology.

[3] Forrester defines an online adult as one who uses the Internet at least once per month from any location.

[4] Forrester's Social Technographics methodology classifies consumers into six overlapping levels of Social Computing participation. Forrester currently defines the first Social Technographics category, Creators, as follows: consumers who publish Web pages, publish or maintain a blog, upload video or music they created, or write and post stories or articles. The categories for Social Technographics only include consumers who participate in at least one of the indicated activities at least monthly. See the April 19, 2007, "Social Technographics®" report.

[5] The percentages shown represent those adults who selected 4 or 5 on a scale of 1 (strongly disagree) to 5 (strongly agree).

[6] This number explicitly includes PlayStation 3 devices.

[7] A household device is a shared device that all members of the household are likely to know about. Personal devices are those devices that are generally owned and used by a single person, such as a mobile phone, MP3 player, or laptop. Forrester generally uses an individual weight when analyzing personal devices and a household weight when analyzing household devices.

[8] We define music-playing phone adoption as an adult with an active phone whose primary phone has the ability to play a music track: for example, an MP3 file.

[9] We define video-playing phone adoption as an adult with an active phone whose primary phone has the ability to play video.

[10] We define a smartphone as a mobile phone that uses a high-level operating system. Specifically, smartphone adopters are those who identify their primary phone either as made by Apple, BlackBerry, HTC, or Palm or as using the Android or Windows Mobile operating system.

[11] Respondents were asked to estimate the number of hours they spent with various media in a typical week. The averages calculated here are based on self-reported data and thus will vary from tracking data collected from sources such as Nielsen or comScore.

[12] Our survey instructs respondents to select a single TV service provider. In past years, we have identified those who select both a satellite and a cable provider in their response as a satellite subscriber, but this year, we have chosen to reflect these multiple responses as a separate group.

[13] These numbers reflect the percentage of each service provider's customer base that paid for either video on demand (VOD) or pay-per-view in the previous month.

14 These numbers reflect the percentage of each service provider's customer base that watched either free video on demand or pay-per-view in the previous month.

15 These numbers are calculated based on consumers' estimations of the time they spend online for either personal or work reasons. Self-reported usage data will vary from tracking data collected from sources such as Nielsen or comScore.

16 These are just a few of the online activities that Forrester tracks in its Technographics surveys. To see the entire battery of questions, view the Excel spreadsheet for the figure.

17 Respondents were given a list of Web sites and asked to indicate which of the Web sites they visit at least weekly. This list was not exhaustive. The data here represents self-reported data and is not meant to be comparable to Web site tracking data like comScore.

18 The data represented here is self-reported based on what respondents indicated they had spent online in the past three months.

19 Forrester's Social Technographics methodology classifies consumers into six overlapping levels of Social Computing participation. Forrester currently defines the Social Technographics categories as follows: 1) Creators are consumers who publish Web pages, publish or maintain a blog, upload video or music they created, or write and post stories or articles; 2) Critics are consumers who comment on blogs, post ratings and reviews, contribute to online forums, or contribute to/edit articles on a wiki; 3) Collectors are consumers who use RSS, tag Web pages, or vote for Web sites online; 4) Joiners are consumers who visit social networking sites or maintain a profile on social networking sites; 5) Spectators are consumers who read blogs, watch peer-generated video, listen to podcasts, read online forums, or read customer ratings/reviews; and 6) Inactives are consumers who do none of these activities. The categories only include consumers who participate in at least one of the indicated activities at least monthly. See the April 19, 2007, "Social Technographics®" report.

20 Forrester asks a variety of attitudinal statements in its Technographics surveys; these represent just a few. To see a full list, visit the Survey Explorer tool at http://www.forrester.com/rb/surveyexplorer.

21 Hardcore gamers are adults who agree with the statement "I consider myself an active video game player" and who also either spend at least 10 hours per week playing PC games or console games (including portable game players) or spend at least 5 hours per week doing both. Casual gamers are adults who play PC or console games for less than 1 hour per week or are PC gamers who only play free PC games. Moderate gamers are adults who play PC or console games but do not meet the criteria for either hardcore or casual gamers.

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