

CANADIAN FAMILIES AND THE internet



RESULTS OF THE IPSOS - REID SURVEY BY RBC FINANCIAL GROUP

Introduction

Canadian families are making major lifestyle changes in response to the wave of new communications technologies entering their homes. This is the overall conclusion of 🍷 "*Canadian Families and the Internet*", a study from **RBC** carried out by **Ipsos-Reid** in consultation with **Omnia Communications Inc.** The study was designed to achieve an understanding of how families and small business owners are balancing the new demands and opportunities of home and work life in the context of technological change.

RBC has undertaken this study, and developed this brochure, for wide distribution among clients, business and the public at large. Our goal in doing so is to help Canadians better appreciate the benefits of Internet-related services. This topical consumer research also plays an important role in shaping our *e-business strategies*, allowing us to maintain our technological leadership and develop improved services for our personal and business customers.

DID YOU KNOW?

The daily lives of ❖ *Canadian Families*
are more and more influenced by
communications technologies.



A computer with Internet
access is fast becoming
an appliance on which
the household
depends, rather than
the 'nice to have'
console it used
to be.

- The personal computer is now considered the communications nerve centre in the home. Two-in-three Canadian households (67%) have a personal computer (*Canadian Inter@ctive Reid Report, IPSOS-Reid, Q3-2001*) and almost half (47%) of Canadian Internet-using families have more than one computer.
- 20% of all families with home Internet access have computers that have been networked.
- Just over one-half of respondents (55%) indicated that if they had to cut costs and could keep only one device in the household, it would be the phone. However, the telephone would not be the preferred device for the majority of respondents if they were stuck on a deserted island for a month. Half (51%) said that they'd prefer to have a computer with Internet access, with only ❖ 21% choosing a telephone and ❖ 12% choosing a television.

- Taking all household members into account, the average family is spending slightly more than ❖ 32 hours online per week. This translates into over ❖ 1,600 hours per family in one year.
- Over half of parents (57%) have guidelines about when and how the computer is to be used and ❖ 48% say they place time limits or curfews on their kids' Internet usage. ❖ 41% say they have to negotiate computer or Internet time in the household.
- Just over one-in-three parents (37%) say they have redesigned, reconfigured, or renovated a portion of their living space to accommodate their computer(s).
- Computers in the home are associated with significant 'rites of passage' among family members. In the same way that a parent may teach their child to ride a bike, the parent goes online with the child to teach them the ropes. Even more interesting, as children become more adept, they are teaching the parents. Over half of parents (56%) admit they have learned at least some of what they know about the Internet from their kids.
- Despite concerns that they may have about the seedier side of the Internet, ❖ 81% of parents with home Internet access agree that they encourage their kids to use the Internet, and ❖ 63% agree that they'd rather have their kids go online than watch television.
- Over half of parents with a home Internet connection have emailed pictures to friends or family (60%), purchased an item directly online (59%) and conducted online banking transactions (57%), while ❖ 49% have researched a vehicle purchase.



THE NEW ONLINE FAMILY

Families are spending so much time online today that technology is introducing a *new dynamic to the relationship between parents and their kids*. Families are finding their own ways of how to spend quality time together to derive the best benefits from the Internet.

For example, while parents are teaching their children how to use the Internet and new technology, they are also finding that they are learning a great deal from their kids. For the first time ever, parents and their kids are having to discuss issues like how to work

HOW WOULD YOU DESCRIBE the way you and your family members share Internet access?

Sometimes surf with my kids

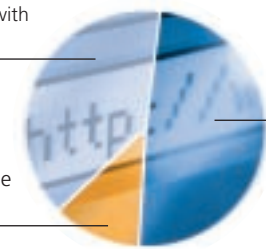
39%

Always go online with kids

12%

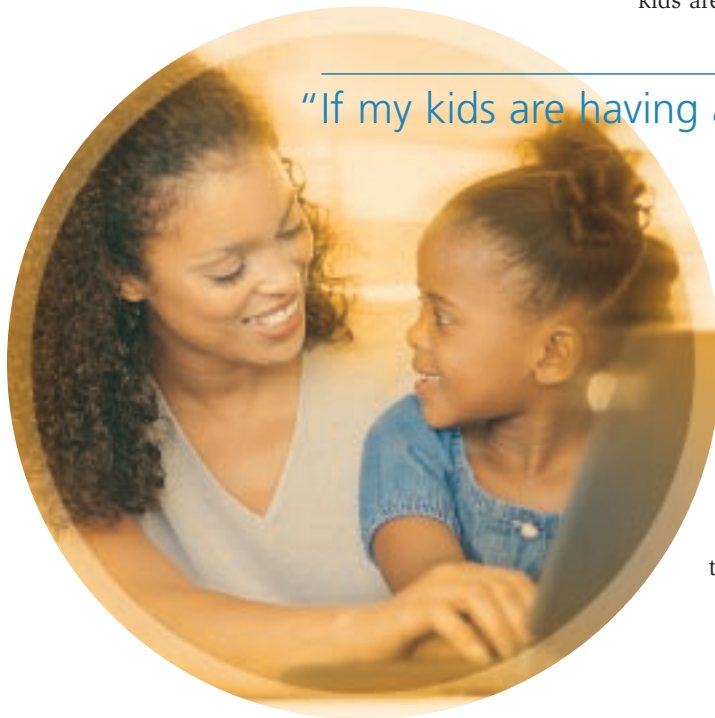
Everyone accesses the 'net on their own

49%



"If my kids are having a tough time finding information I'll go online with them to try and help them out, and they do the same for me."

online – both together and apart. As a result, parents are finding they need to create new rules and guidelines for how their kids use the computer and Internet access. They are setting time limits for usage and having to think about how they want their kids to spend their time online.

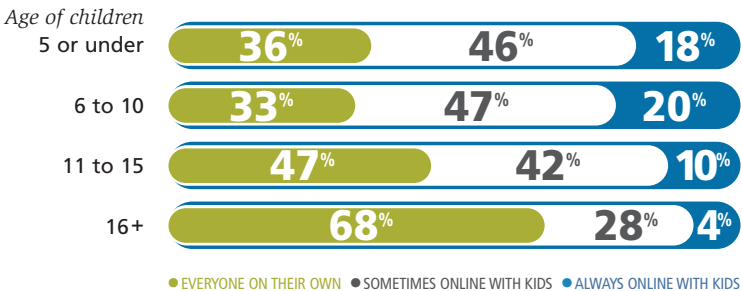


How the Family Uses the Internet

Families go on the Internet both together and independently. For those that do go online with their kids, more often than not it is at the request of the children.

- About half (48%) of parents say that everyone in the household goes online on their own, while 39% sometimes go online with their kids and 12% always go online with their kids.
- Parents of younger children are more likely to go online always or sometimes with their kids.
- Three-in-four parents (78%) who go online with their kids find that it is at their kids' request.

HOW WOULD YOU DESCRIBE the way you and your family members share Internet access?



“We bought a bigger clock to put near the computer so that the kids adhere to their time limits.”

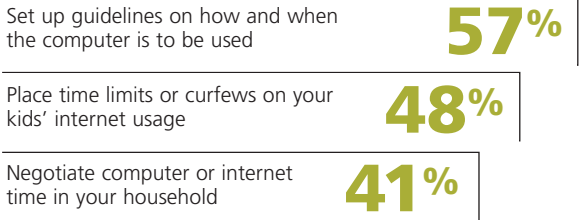
Creating Guidelines for Internet Usage

Given the amount of time being spent online in the typical family household, it is not surprising that many parents find they have to engage their kids in a dialogue about how they use the Internet.

- Over half of parents (57%) say they have guidelines about when and how the computer is to be used, and 48% say they place time limits or curfews on their kids' Internet usage. 41% say they have to negotiate computer or Internet time in the household.

INTERNET USAGE GUIDELINES

HAVE YOU HAD TO DO any of the following?



Who Learns from Whom?

Learning about technology is a two-way street for the online family. With few parents classifying themselves as Internet experts, many parents are learning about the Internet from their kids.

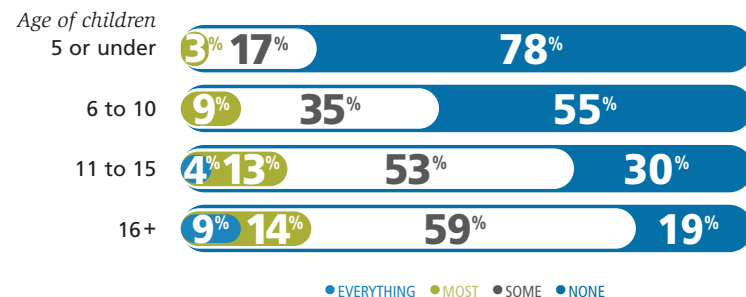
- Over half of parents (56%) admit they have learned at least some of what they know about the Internet from their kids. ❖ 11% say they learned most of what they know from their kids and ❖ 3% say they

"I taught my daughter how to go online, but now she is just as proficient as I am and we do our own thing."

have learned everything they know about the Internet from their kids.

- Parents with older kids at home (16+) are more likely to learn at least some of what they know from their kids (81%) than parents with kids in the 6-to-10 age bracket (45%)

THINKING ABOUT what you know about the Internet, how much have you learned from your kids?

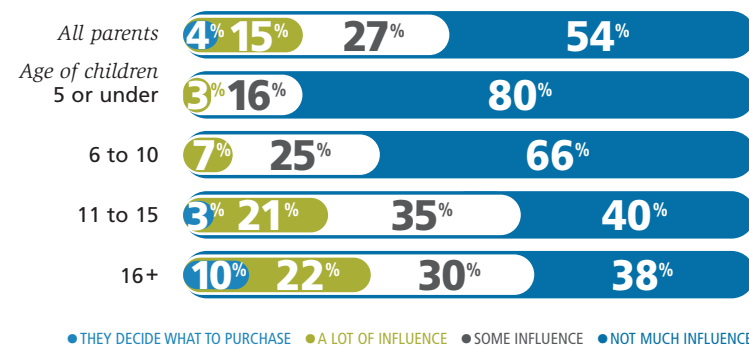


- Half of parents (48%) say they are ahead of their kids when it comes to learning about new technology, while ❖ 28% say they learn at the same pace and ❖ 23% admit their kids are ahead of them.

- However, when looking at age differences, parents of older kids are most likely to admit their kids learn about new technology before they do (45%) rather than the other way around (26%).

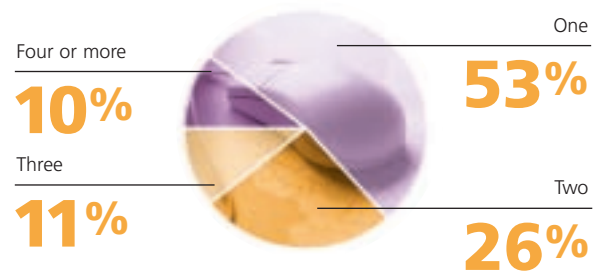
- The same pattern emerges when it comes to purchasing new technology for the household, with ❖ 46% of parents admitting their kids do have at least some influence in the purchase of new technology.

HOW MUCH INFLUENCE did your kids have on your most recent computer or new technology-related purchases for the household?



THE NEW ONLINE HOME

HOW MANY COMPUTERS do you use
in your household?



As they spend more and more time on the computer and do more and more activities online, Canadian families are finding that new technology has affected not only their family relationships, but how their homes are set up to accommodate new technologies. In fact, as Canadian families are moving from stand-alone to networked technologies, many are also finding they have needed to modify their homes, renovate rooms and even alter building plans to meet their growing needs. The computer and the Internet have moved from the den into the rec room to become part of the mainstream of the home.

“We have four people in the house and four PCs.
That way, no one has to wait and no one has to fight.”

Number of PCs in the Household

- Almost half (47%) of families with home Internet access, have more than one computer in the household.



Home Area Networks (HANs)

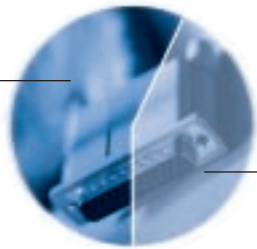
- Multiple computers mean many families (43 % of those with two or more computers) have turned to

“We networked our computers to share files, printers, and the Internet connection.”

ARE ANY OR ALL of your computers networked together with a home area network?

No

57%



Yes

43%

networking the computers together to share a common Internet access point or to give each computer access to various peripherals. Put another way, 20 % of all families with home Internet access have networked their multiple PCs.

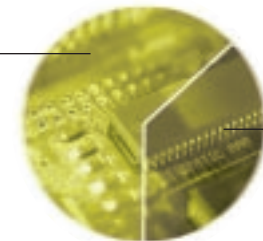
Accommodating the Computer in the Home

- Only 17 % of families with multiple computers keep all of them in one room.
- Just over one-in-three parents (37 %) say they've redesigned, reconfigured or renovated a portion of their living space to accommodate their computer(s).

HAVE YOU RE CONFIGURED, redesigned, or renovated an area of your house to accommodate a computer?

No

63%



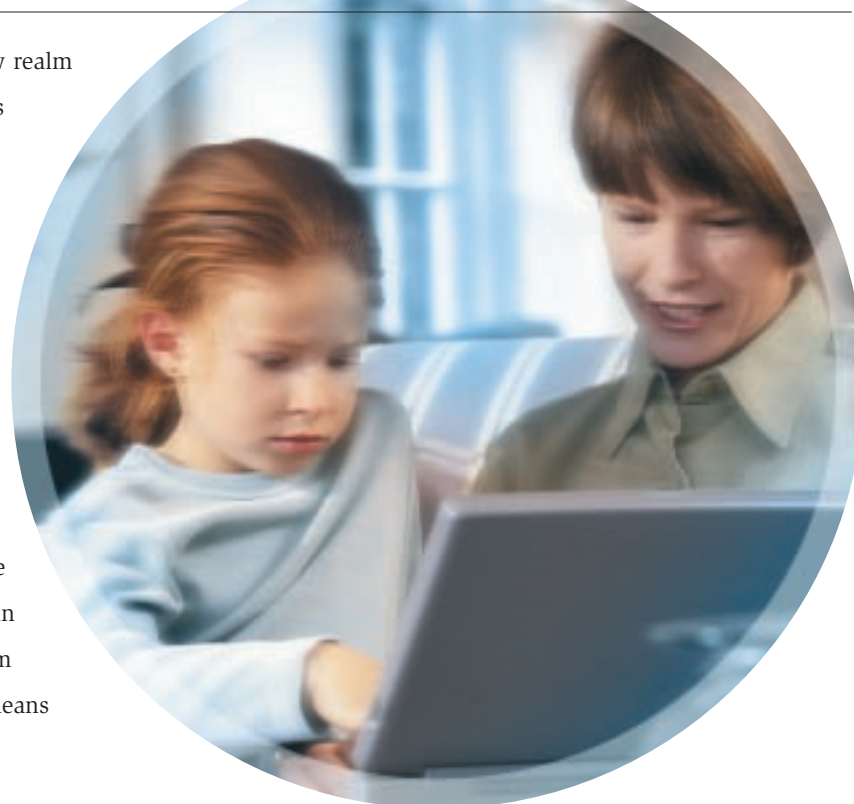
Yes

37%

“We made a room in the basement for the computer, scanner, and printers. The computers were a distraction when they were in the bedrooms as no one went to bed.”

BALANCING WORK AND FAMILY IN THE ONLINE HOUSEHOLD

The Internet has opened up a new realm of work possibilities. Professionals formerly tied to their desks can utilize technology to access their company's network at home. Email can be set up to be accessed online or with a wireless device. New operating systems allow home computers to access files on the work computer. All of these innovations mean people can work from home in a fashion that replicates being in the office. More time working from home and less time commuting means more time with the family.



"The Internet has made shopping, research and banking a lot easier."

"I do what I did before,
but in a more
'family-friendly' way."

The Internet also allows families to convert time that used to be spent away from home doing household chores into time spent at home. For example, online banking and online purchasing reduces the time spent driving to and from physical locations to shop or pay bills.

"Online banking is so much better than banking at branches because I can pay my bills with a simple click instead of running around in the car."

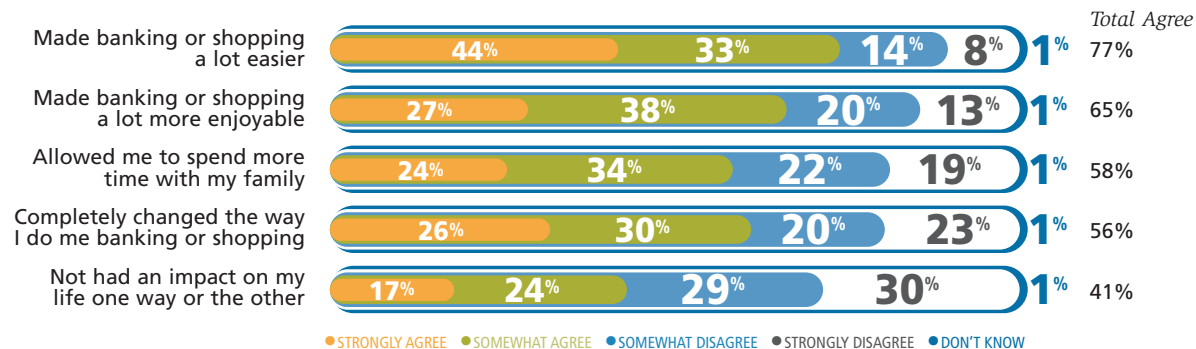
The New Way of Doing Chores

- Online bankers and online purchasers recognize and appreciate the time they are saving in their everyday lives. Over half (58%) agree that banking or shopping online has allowed them to spend more time with their families.
- 77% agree that online banking and online shopping have made these tasks a lot easier, and 65% agree that banking and shopping are more enjoyable now that they can be done online.

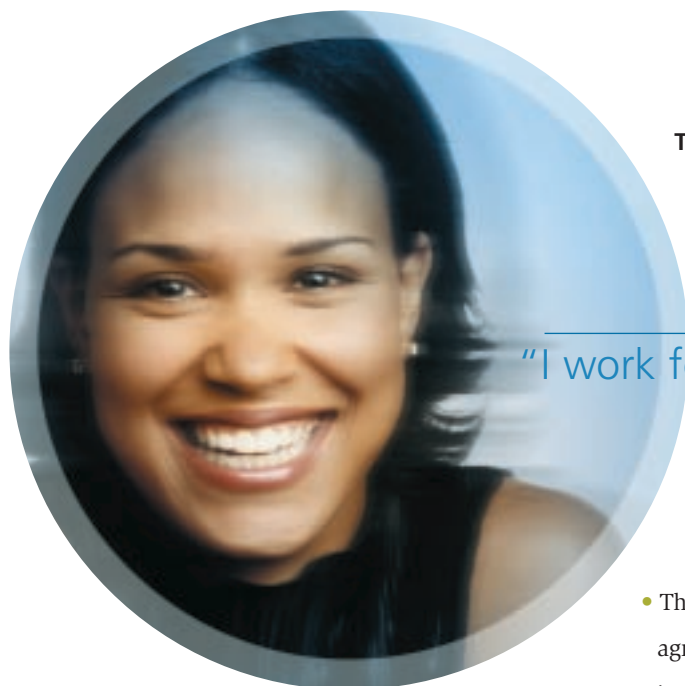
Online Banking

- Parents who bank online are more satisfied with online banking than all parents are with banking at branches. However, shopping offline (in stores) is still preferred over shopping online.

PURCHASING ITEMS and/or conducting online financial transactions has...



"Generally, shopping online has been a positive experience, but my biggest complaint is the shipping costs."



Telecommuting

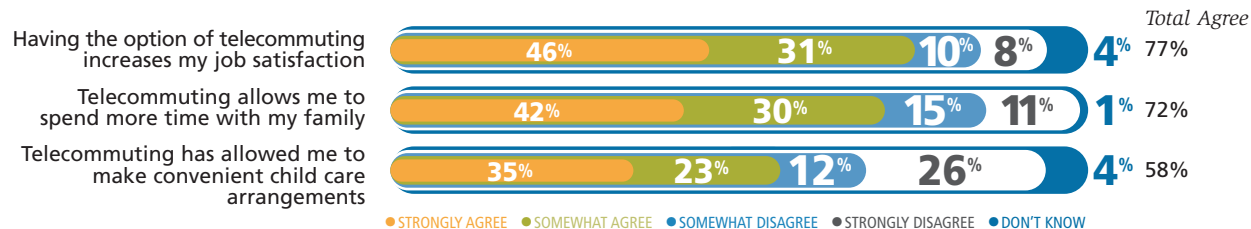
The tangible and intangible benefits of telecommuting are many.

"I work for a company in one city, but live in another. Telecommuting saves me **emotional** and **physical energy**. It saves me **money**. It gives me a better work/family balance. I am very **happy** with my decision."

- Three-in-four respondents (77%) who telecommute agree that having the option to telecommute increases their job satisfaction.
- 72% agree that it allows them to spend more time with their family.
- 58% find that it allows them to make more convenient child care arrangements.
- While not as prevalent, other benefits of telecommuting include being able to take more trips out of the city (32%), better options about where to live (30%) and having to purchase only one vehicle (18%).

TELECOMMUTING ATTITUDES

HOW MUCH DO YOU agree or disagree with each of the following statements...



Small Business Usage of the Internet

Not only has the Internet had a significant impact on the household, but it is also affecting small business in a major way — further blurring the lines between work and home.

“I could carry on with my business without the Internet, but the day would be longer.”

- 72% agree that the Internet allows them to operate their business more efficiently.
- Almost half (47%) say they can't imagine running their business without the Internet.

IS THE COMPUTER that you use to run your business also used by other family members for personal use, or is it used only for business purpose?

Used by other family members

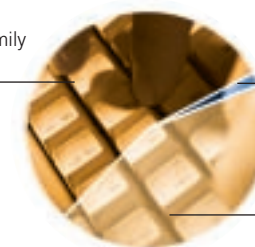
55%

Don't have other family members

1%

Business use only

44%



SOHO ATTITUDES ABOUT THE INTERNET

DO YOU AGREE OR DISAGREE

with the statement...

I use the Internet to help me run my business, but I am not dependent on it



The Internet allows me to operate my business more efficiently



I can't imagine running my business without the Internet



The technology I use to run my business is more hindrance than help



● STRONGLY AGREE ● SOMEWHAT AGREE ● SOMEWHAT DISAGREE ● STRONGLY DISAGREE ● DON'T KNOW