



# Delvinia INSIGHTS Online Communities & Information Sharing

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# Our Commitment to Insight

Delvinia is committed to continuously uncovering data-driven insights that will help us better understand, and ultimately design superior Digital Customer Experiences for Canadians.

# Background

Delvinia has developed proprietary tools to access data-driven insights: AskingCanadians™, our online consumer research panel, and our Insight Engine, a database of digital and other consumer insights. By leveraging these tools we are able to track key attitudes and behaviours of consumers across Canada that inform our interactive strategy and design solutions.

In order to give you a taste of our insight capabilities, we've compared and contrasted the self-reported behaviours of 4 consumer groups in the Canadian marketplace:

Those who Don Tapscott\* termed the “Net-Generation” (NGen) aged 18-30, Gen X aged 31-44, Boomers aged 45-65, and 65+.

\*Author of *Grown Up Digital*

# Methodology

- Results are based on 11,559 regionally and demographically representative\* AskingCanadians™ panelists surveyed, 50/50 gender split, broken down as follows:
  - **1,112** 18-30 year olds (NGen)
  - **3,432** 31-44 year olds (Gen X)
  - **6,222** 45-65 year olds (Boomers)
  - **793** 65+
- Data was collected from October 2008 – March 2009.
- This deck will review these groups in terms of their:
  - Social Networking Behaviour
  - Attitudes towards Sharing Personal Information

\*Representative of Canada, based on Stats Can figures

# Summary of Findings

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- As social networking and online communities continue to grow and play increasingly greater roles in the lives of Canadians, people's attitudes towards providing personal information online reveals a continued reluctance to share certain details about themselves.
- Digital technology has become extremely important to our social lives. Working-aged Canadians feel that digital technology makes it easier to stay connected with social contacts and family, more so than it does to stay connected with work. Females feel this more strongly than males.
- Although Canadians – particularly those 44 and younger – report visiting the more popular online communities on a very frequent basis (Facebook, Flickr, Youtube), significantly fewer Canadians post content to these sites as often.
- Despite the hype, Twitter is currently a small blip on the social radar (only 6% of NGen and 4% of Gen X report visiting it within the last month).
- When sharing online content with others, NGen, Gen X and Boomers are most likely to cut and paste a link into an email. Meanwhile, Canadians 65+ are most likely to use a site-based service to forward a link, and females of all ages are more likely to leverage this feature vs. males.

# Summary of Findings

- Of all the generations, NGeners have the least amount of concern about sharing all types of personal information online.
- When it comes to sharing credit card information or using online payment services, the majority of Canadians under 45 are comfortable but concern increases with older generations, with Canadians 65+ expressing the most concern about sharing this type of information.
- Meanwhile, when it comes to sharing income, employment, demographic, address and phone number information, Boomers are the least comfortable.
- The great majority of Canadians over 30 feel least secure about sharing income and employment information online.
- Meanwhile, NGeners feel least comfortable sharing their addresses and phone numbers online.
- In virtually all cases, females are less comfortable sharing personal information than males.

Detailed Findings

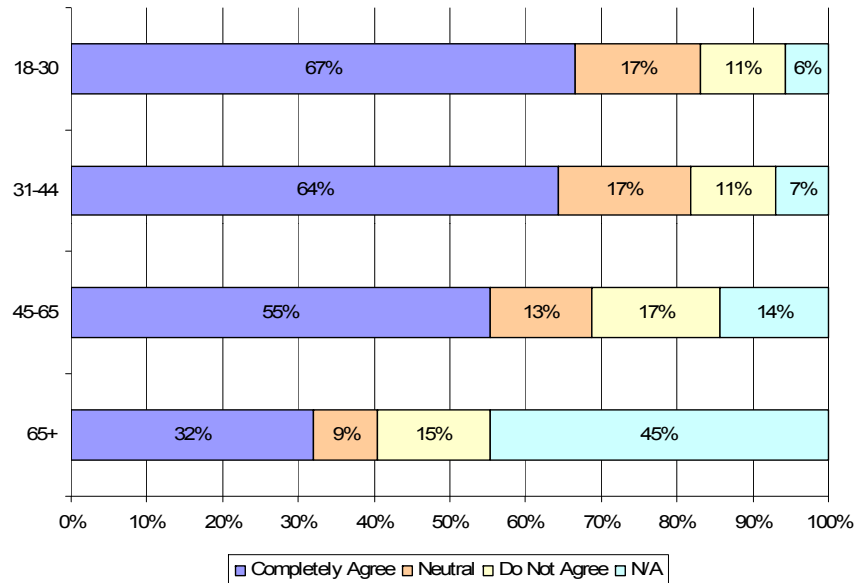
# Social Networking

# Social Networking

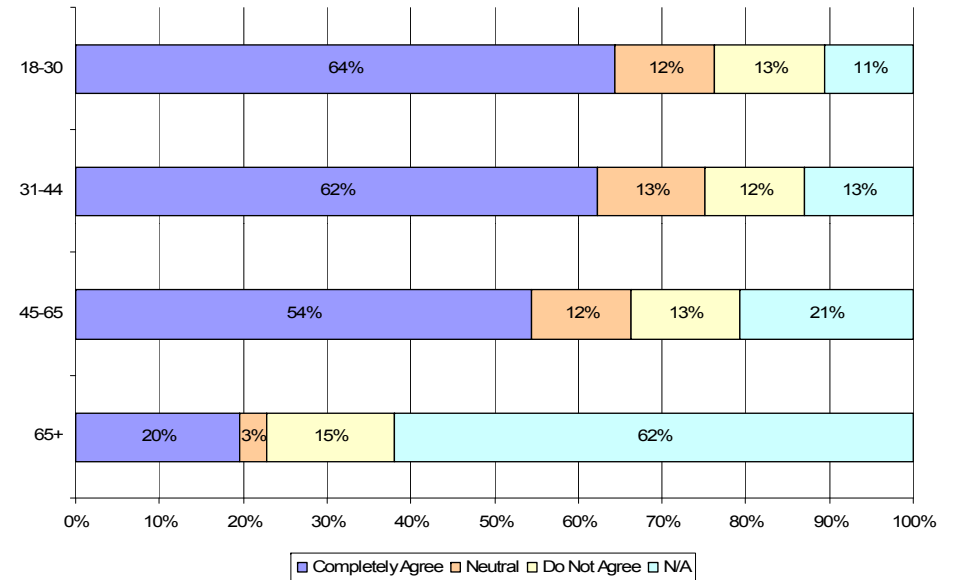
- Working-aged Canadians believe that digital technology makes it easier to stay connected with social contacts and family, at least 12% more so than it does to stay connected with work. Females 65 and younger believe this at least 7% more so than their male counterparts.
- Facebook continues to have a strong presence in Canada, with 84% of NGen and even 37% of Canadians 65+ visiting the site at least once in the past month.
- While Youtube and Facebook are neck-and-neck for Canadians under 45, Youtube is the clear winner for those 45 and up – 59% of Boomers and 50% of 65+ visited Youtube at least once in the last month.
- Only 6% of NGen and 4% of Gen X report visiting Twitter in the last month. These same levels of frequency are seen with other, less talked about social networks (Hi5, DIGG, Tagged).
- There is a significant difference between how frequently Canadians visit social network sites vs. post content – for example, 50% fewer NGeners post content on Facebook vs. visit Facebook.
- Youtube experiences the greatest difference between views and posts – for example, 77% fewer NGeners and 55% fewer Boomers post content vs. visit the site.

# Staying Connected with Work

Males - Digital Tech. Makes it Easier to Stay Connected with Work



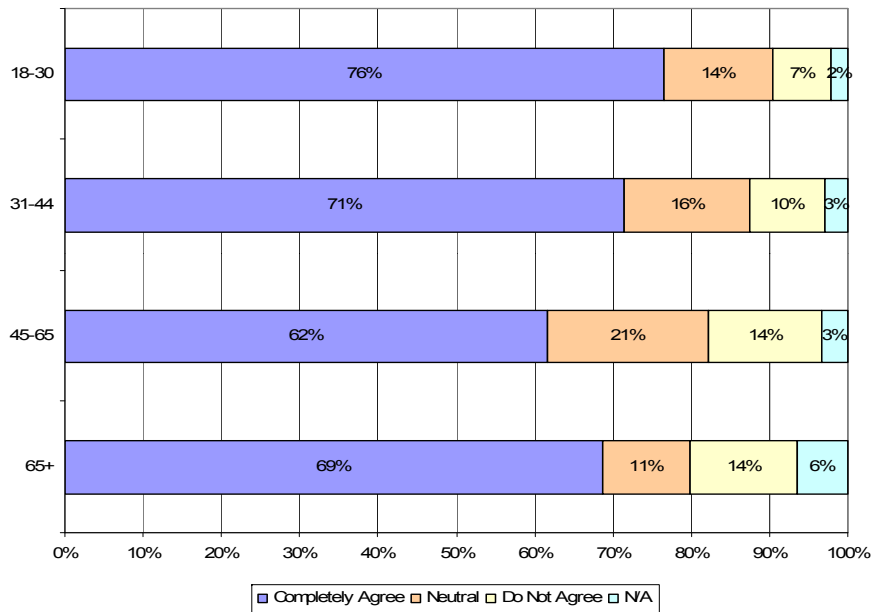
Females - Digital Tech. Makes it Easier to Stay Connected with Work



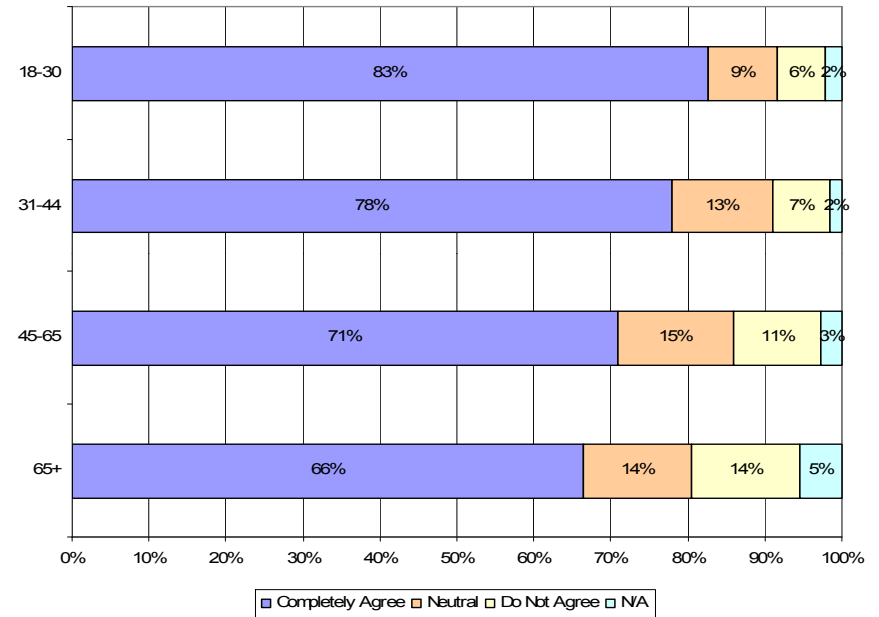
The majority of Canadians below retirement age agree that digital technology allows them to stay better connected with their workplaces. This is particularly true of Canadians 44 and younger.

# Staying Connected Socially

Males - Digital Tech. Allows for Easier Social Connections



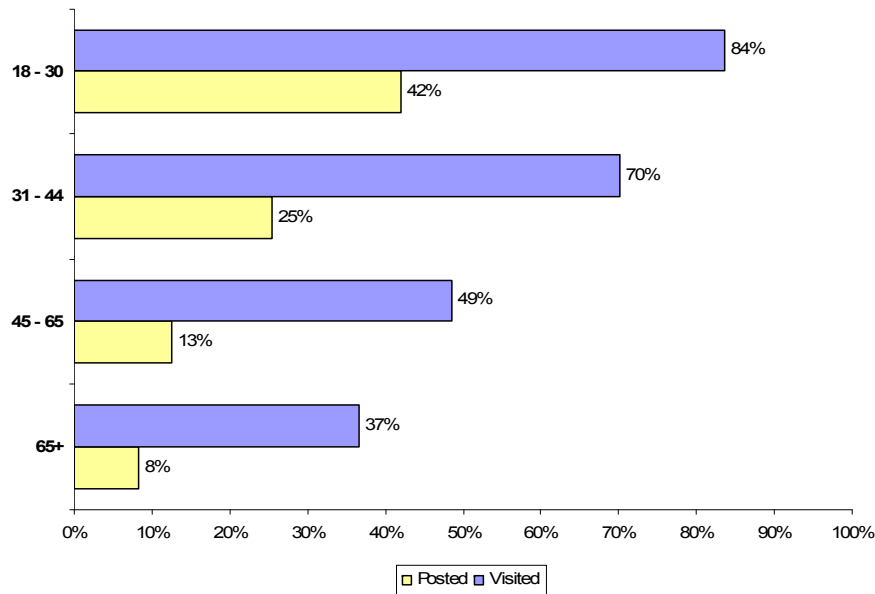
Females - Digital Tech. Allows for Easier Social Connections



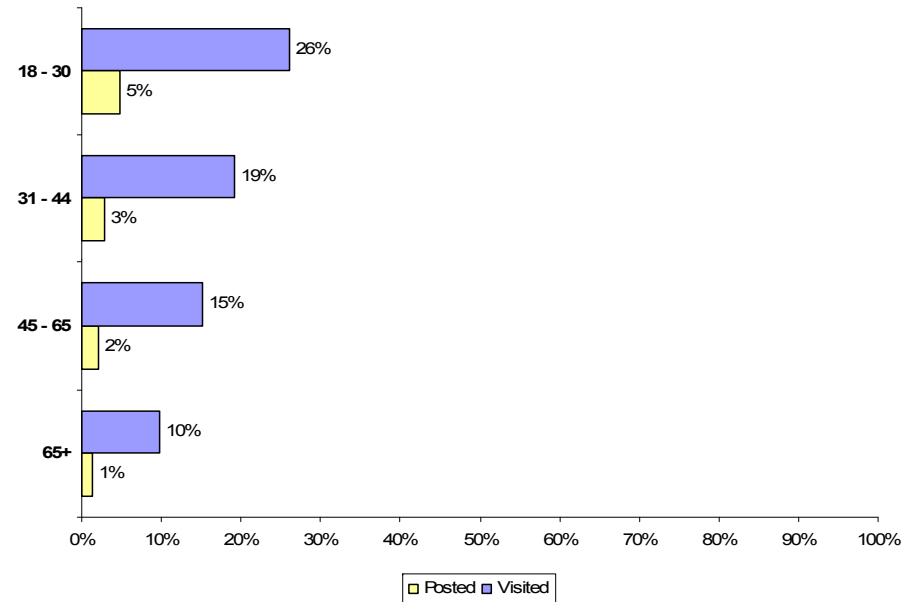
Meanwhile, an even greater majority of Canadians of *all* age groups completely agree that digital technology makes it easier to stay connected with their social contacts. Younger generations are slightly more inclined to feel this way, and females under 65 feel this more strongly than males.

# Online Communities

FACEBOOK in the Past Month



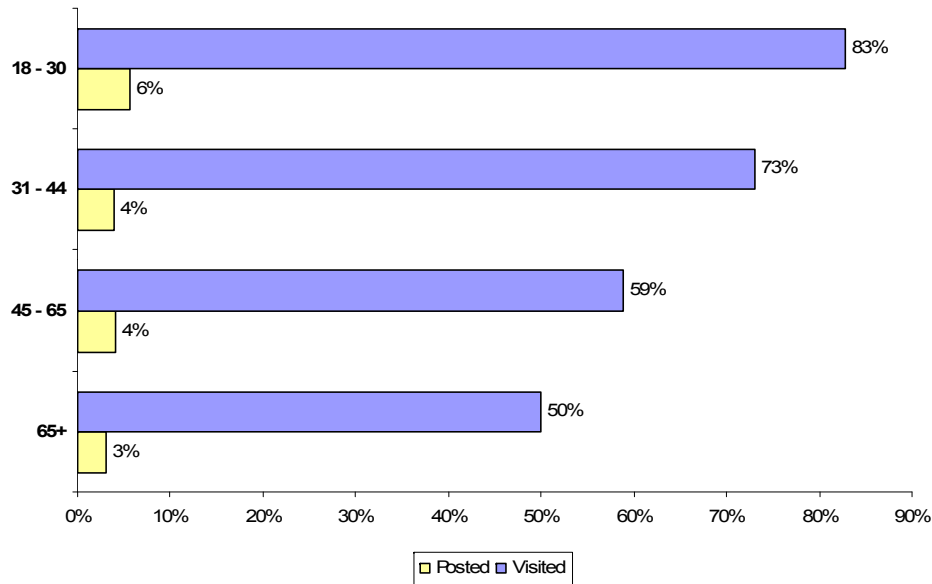
MYSPACE in the Past Month



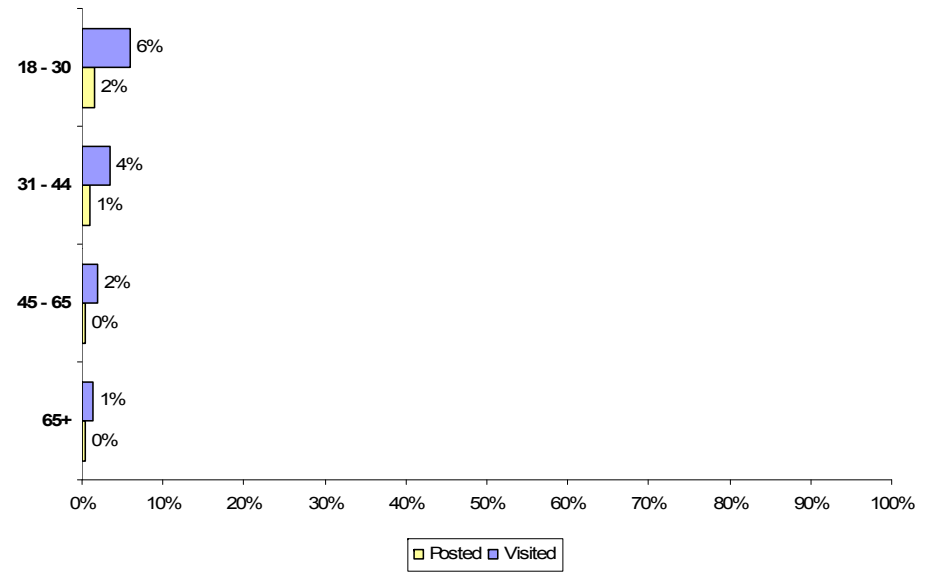
While Facebook continues its massive success in Canada, all social networking sites experience a drastic drop between the amount of people visiting these sites vs. actively posting content. Not surprisingly, both visits and participation are lower amongst older generations of Canadians.

# Online Communities

YOUTUBE in the Past Month



TWITTER in the Past Month



Although Twitter seems to be top-of-mind in the media these days, it's still in the very early stages of adoption. Twitter's current penetration remains extremely small, active participation even smaller, and only time will tell it's true potential. In fact, Hi5 showed marginally higher usage amongst younger groups vs. Twitter.

Detailed Findings

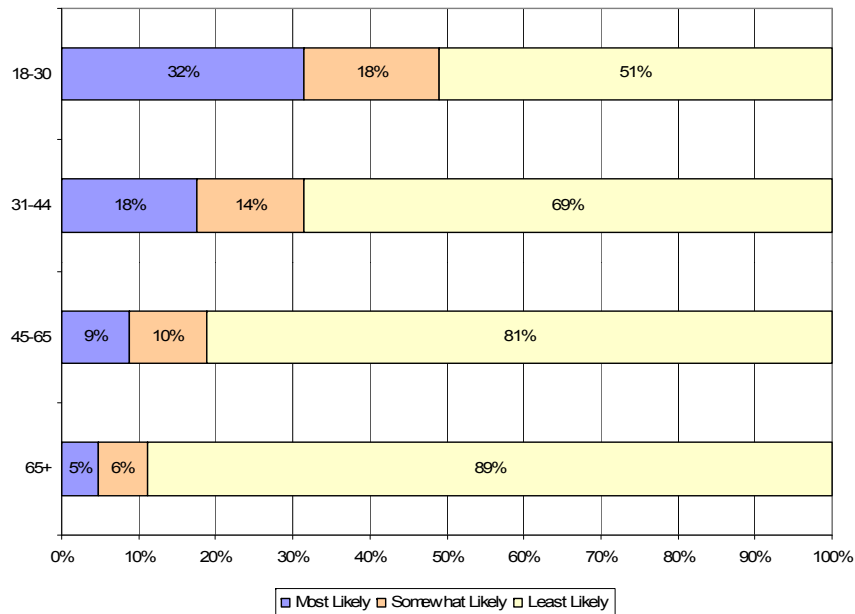
# Information Sharing

# Sharing Online Content

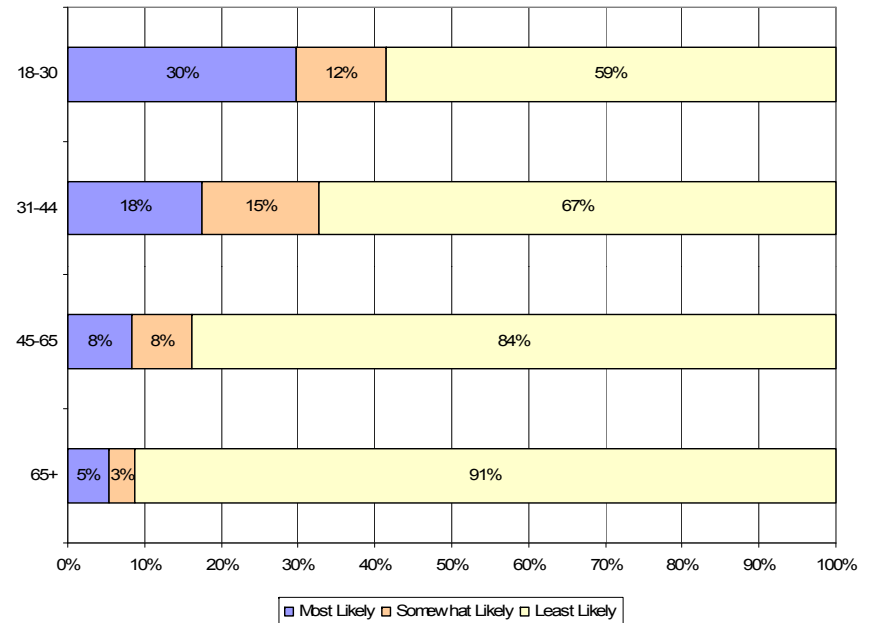
- When NGen, Gen X and Boomers share online content with their personal networks, they are most likely to cut and paste a link into an email. This is true whether they're sharing information with 1 or 2, or 10 or more people.
- Canadians 65+ are most likely to share content by using a site-based service to forward a link, and females of all ages are up to 10% more likely to use this service than males.
- Canadians of all ages are up to 10% less inclined to leverage a site-based service to forward a link when sharing information with 10 or more people vs. 1 or 2.
- Canadians of all ages are least likely to share content by posting a link online (from 31% of NGen to only 5% of Canadians 65+).

# Sharing with 1 or 2 people

Males - Post Link Online for 1 or 2 People



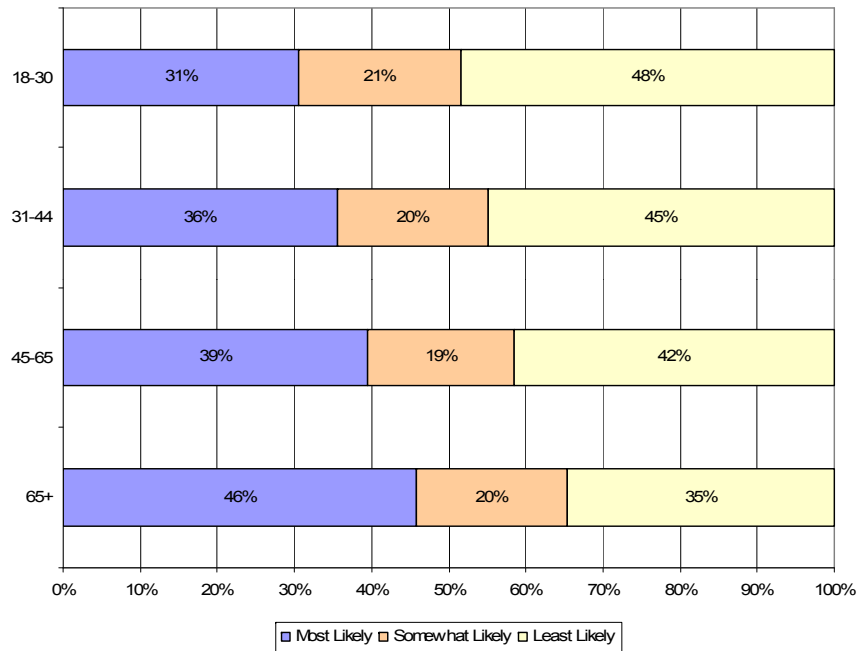
Females - Post Link Online for 1 or 2 People



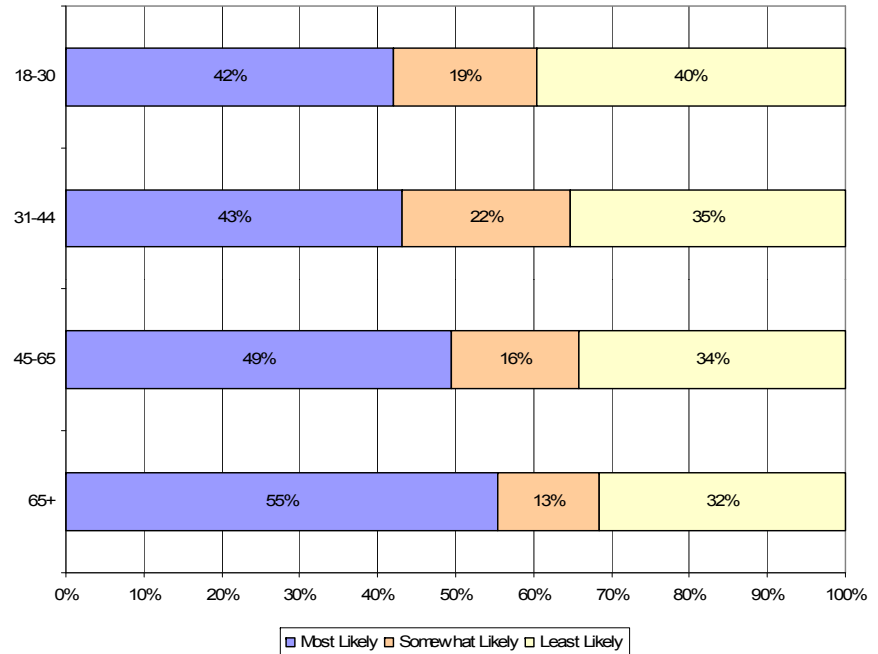
When sharing online content, NGen, Gen X and Boomers of both genders are most likely to cut and paste a link into an email, whether they are sharing it with 1 or 2 people, or more than 10 people. They are least likely to post the link online, particularly when sharing with only 1 or 2 people. This is especially true for older generations of Canadians, almost all of whom do not use this method.

# Sharing with 10 or more people

Males - Use Site to Forward Link to 10 or More



Females - Use Site to Forward Link to 10 or More



Unlike other age groups, Canadians 65+ are most likely to use a site-based service to forward a link, and females of all ages are up to 10% more inclined to use this service vs. males. The likelihood of using this feature drops slightly when they're sharing with 10 or more people, vs. 1 or 2 people.

# Sharing Personal Information

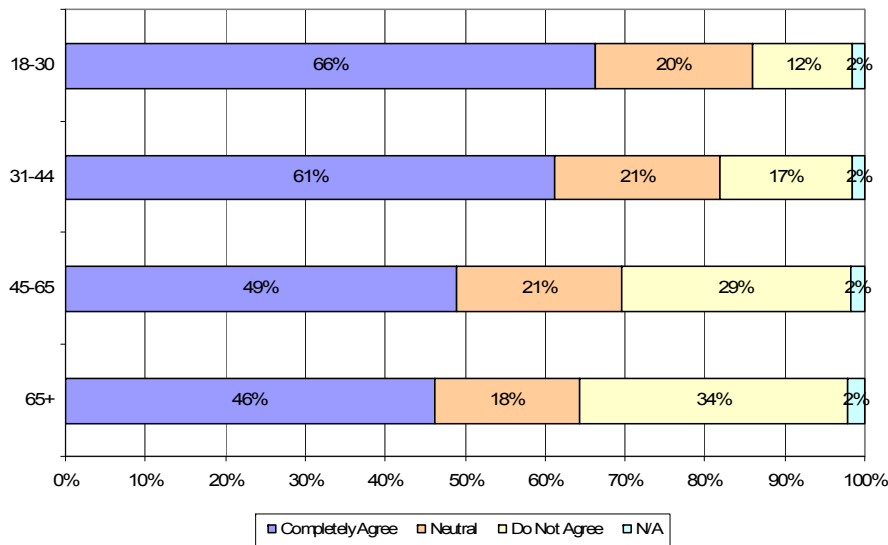
- Of all the generations, NGeners feel the most safe about sharing any type of personal information online.
- The majority of NGen and Gen X feel safe about sharing credit card information & using e.g. Paypal online; Boomers & Canadians 65+ are significantly less confident (only 46% of Boomers, 39% of 65+ feel safe).
- Only the majority of NGeners are comfortable sharing demographic information (53%) – the majority of all other generations are neutral or not comfortable sharing e.g. age gender, marital status online.
- The majority of Canadians of all ages and genders are neutral or do not feel safe sharing their addresses or phone numbers online. NGen is most comfortable (29% feel safe), while Boomers are least comfortable (only 22% feel safe).

# Sharing Personal Information

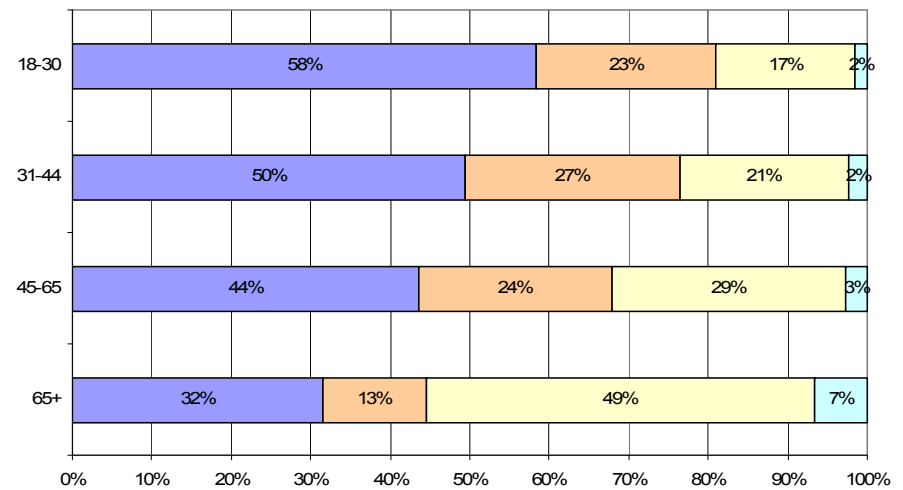
- Gen X, Boomers and Canadians 65+ are least comfortable sharing their income and employment information online (ranges from only 23% of Gen X to 15% of Boomers feeling safe).
- Interestingly, NGeners are least comfortable sharing their addresses online – 5% less comfortable than they are sharing their income and employment information.
- Females feel less safe than their male counterparts when sharing information of any kind, but this gender difference is least apparent amongst Boomers.

# Making Credit Card Purchases

Males - Feel Safe about Credit Card Purchases Online



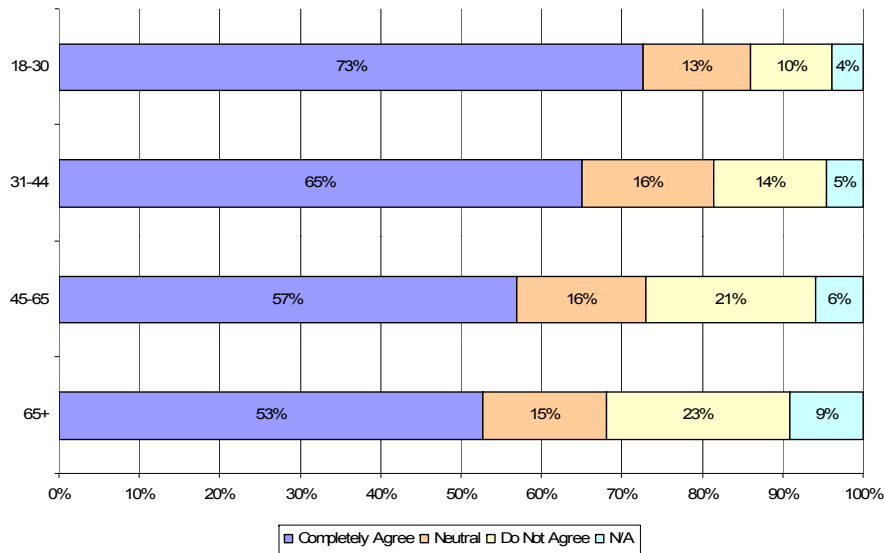
Females - Feel Safe about Credit Card Purchases Online



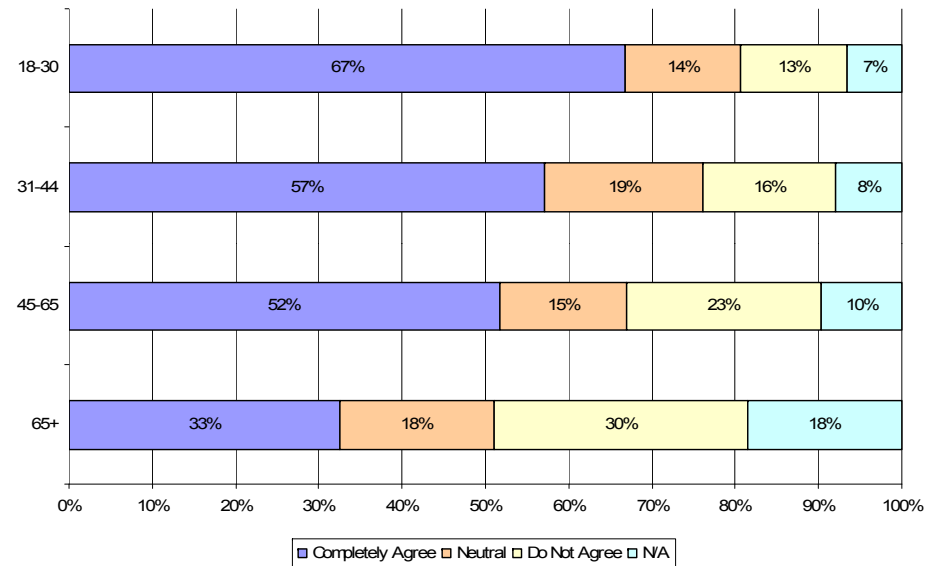
A significant amount of Canadians still feel some hesitation when it comes to sharing their credit card information online. This is less of a concern for NGen vs. any other generation, however females feel less safe than males, regardless of age.

# Using Online Payment Services

Males - Feel Safe about Online Payment Services



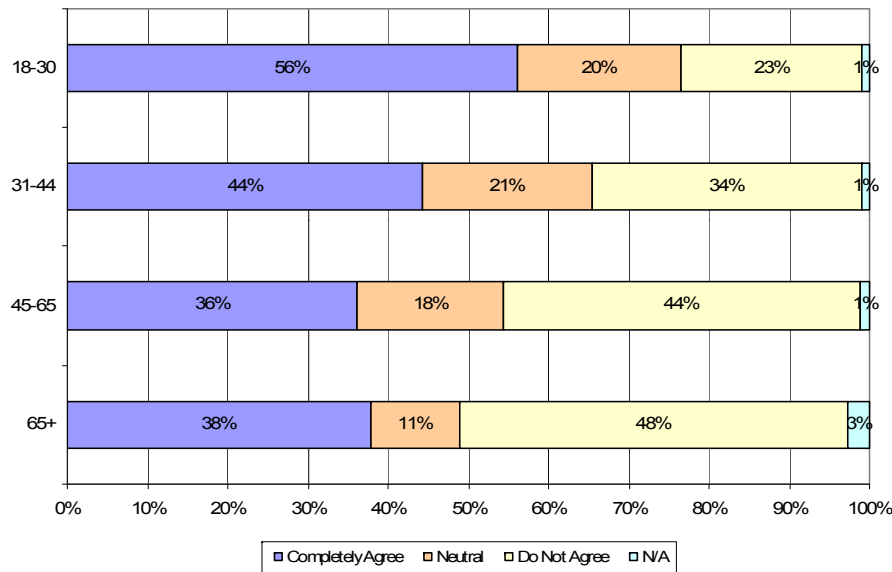
Females - Feel Safe about Online Payment Services



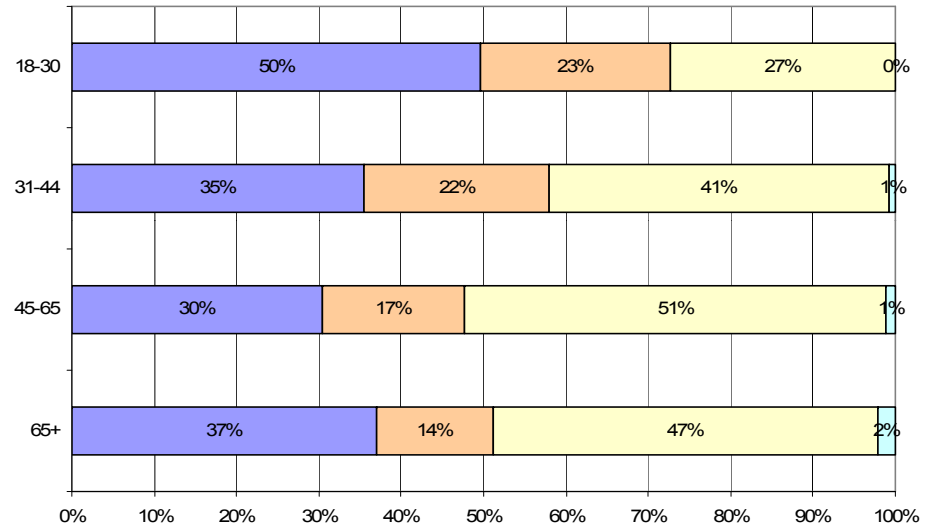
Meanwhile, Canadians of all ages feel safer when making payments via online payment services (like Paypal); but again, females feel less comfortable with this method of payment than males. Interestingly, this gender difference is least apparent amongst Boomers.

# Sharing Demographic Information

MALES - Comfortable Submitting Age, Gender, Marital Status Online



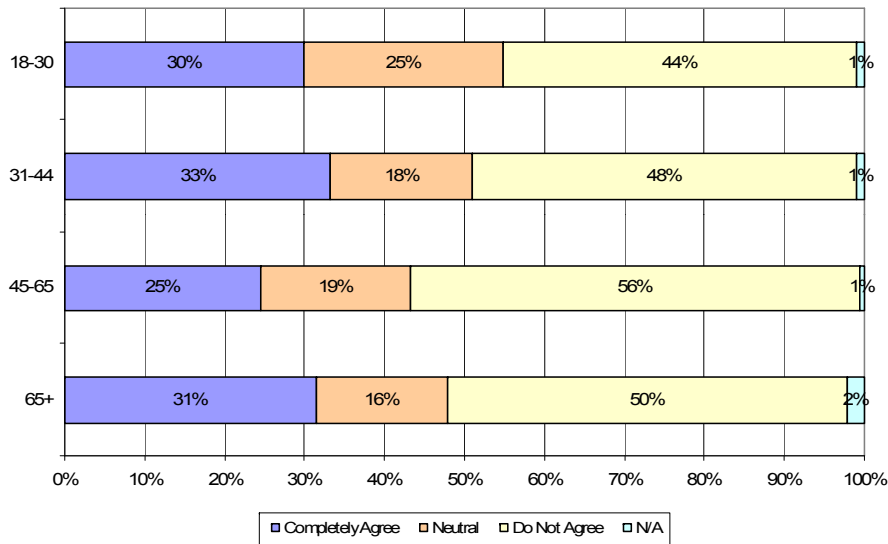
FEMALES - Comfortable Submitting Age, Gender, Marital Status Online



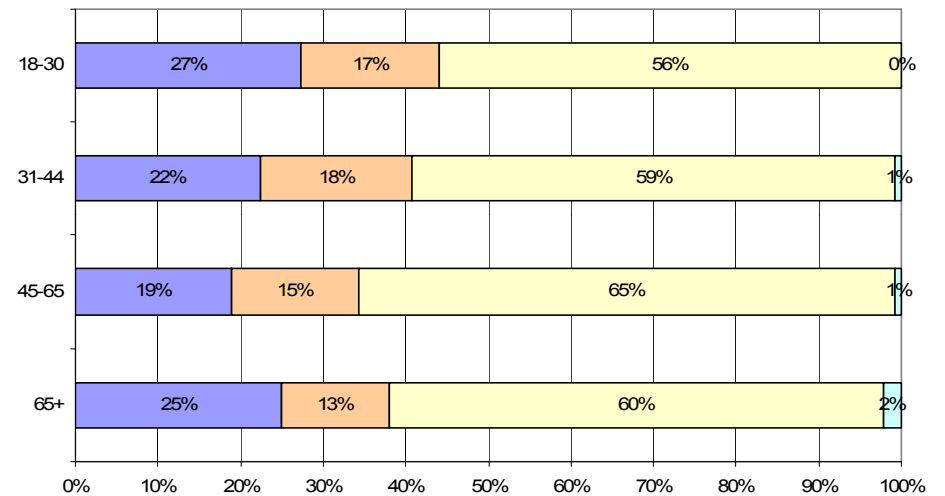
While the majority of NGeners are comfortable submitting demographic information online, the majority of all the other generations are not. At least 50% of females of all ages are not comfortable sharing this information, although gender differences are least apparent when it comes to demographic information.

# Sharing Addresses & Phone Numbers

MALES - Comfortable Submitting Address Online



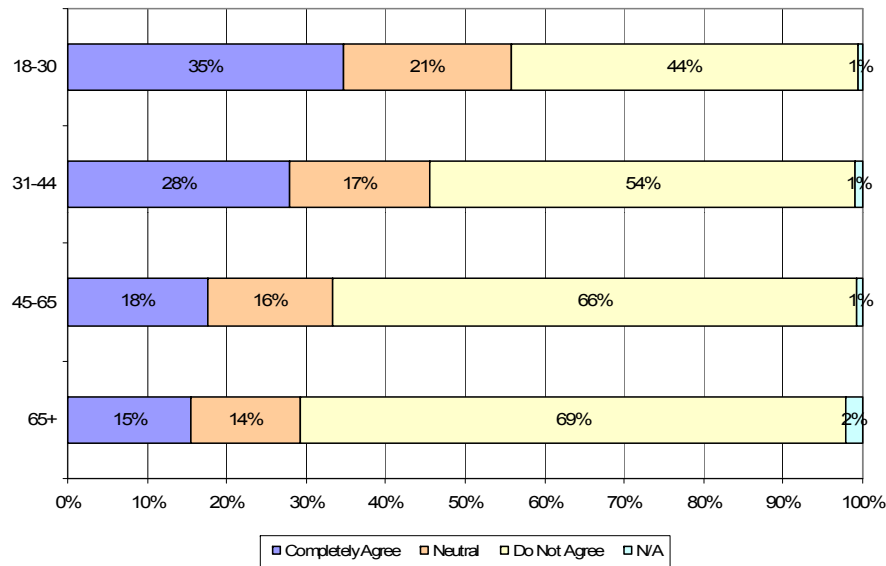
FEMALES - Comfortable Submitting Address Online



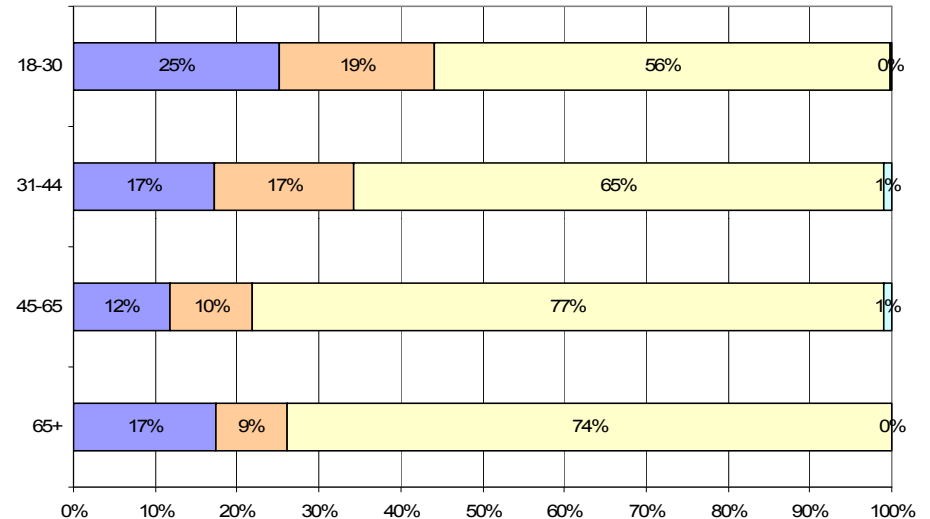
The majority of Canadians of all ages and genders do not feel comfortable submitting their addresses and phone numbers online. Although NGen is slightly more comfortable than the other generations, they report feeling the lowest sense of comfort about sharing this particular type of information online vs. any other personal information.

# Sharing Income & Employment Information

MALES - Comfortable Submitting Income & Employment Info Online



FEMALES - Comfortable Submitting Income & Employment Info Online



Of all the types of personal information Canadians are asked to provide online, Canadians over 30 are least comfortable sharing their income & employment information. Again, females of all ages are less comfortable than males – especially female Boomers & 65+.

# About Delvinia

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Delvinia has two key areas of business: **Interactive Design & Online Data Collection.**

Our **Interactive Design** group leverages our proprietary Insight Engine to provide data-driven interactive design and digital marketing solutions to many of Canada's top corporations.

Our **Online Data Collection** group services the Market Research community using our online consumer research panels, AskingCanadians™ and Qu'en Pensez-Vous™.

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# Insight-Driven Programs

Following are examples of specific programs where we applied our data-driven insight approach:



RBC Better Student Life  
(NGen Program)  
[www.rbc2p.com](http://www.rbc2p.com)



Princess Margaret  
Hospital Foundation  
[www.5kyourway.ca](http://www.5kyourway.ca)



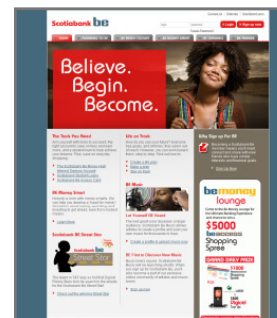
Canadian Opera Company  
[www.coc.ca](http://www.coc.ca)



Town of Markham  
[www.markham.ca/greenprint](http://www.markham.ca/greenprint)



Manulife Coverme  
[www.coverme.com](http://www.coverme.com)



Scotiabank BE  
[www.scotiabankbe.com](http://www.scotiabankbe.com)

# Other Attributes We Track

- **Here are just some of the additional attributes we track, from which we derive our insights:**
  - Mobile phone usage
  - Online activities, habits & purchases
  - Online search behaviour
  - Technology ownership
  - Attitudes towards technology
  - Attitudes towards online advertising
  - Employment information
  - Travel behaviour
  - Loyalty program memberships

For more information on how you can leverage Delvinia's Insight Engine and our AskingCanadians™ online consumer research panel, contact:

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