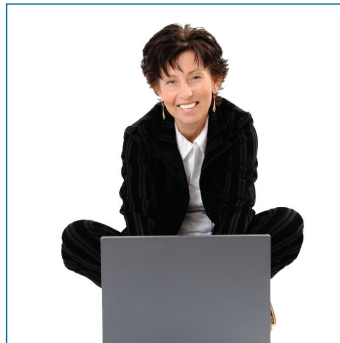


# AGE OF DISCONNECT ANXIETY

AND FOUR REASONS WHY IT'S DIFFICULT TO STAY OFF THE GRID

Canadian Research Summary  
March 2008



## CANADIAN CONTEXT

The last 10 years have seen remarkable growth in the penetration and use of technologies such as PCs, broadband and mobile phones.

In 1998, only 34% of Canadians were Internet users and just one-in-ten had access to high speed Internet at home. There were very few users of instant messaging and social media did not exist. Mobile phones were used by less than 30% and digital cameras and MP3 players were not yet mainstream.

Fast forward 10 years...

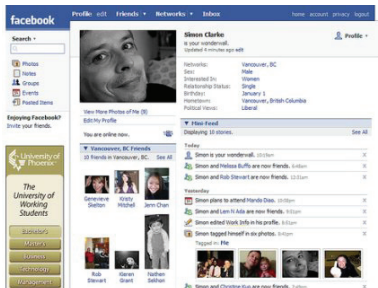
Internet use more than doubled to 75%, translating to 23 million Canadians. Nearly 8 million Canadians connect via Facebook. About the same number uses instant messaging daily, not to mention the hundreds of emails sent and received.

There are more than 19 million cell phone users in Canada and seven-in-ten of those say that their wireless devices are always with them.

Mobile phone use in the younger age groups doubled between 2003 and 2008. A typical Canadian aged 12-24 sends and receives 90 text messages weekly and logs 2.8 visits to their Facebook profile daily to keep up with some 154 friends on average.

And over 2 million Canadians use a BlackBerry or similar smartphone, up from a tiny fraction of that number only 4 years ago.

The average Canadian consumer is more connected and has more instant access to people and information than at any time in history. Losing that access creates *disconnect anxiety*.



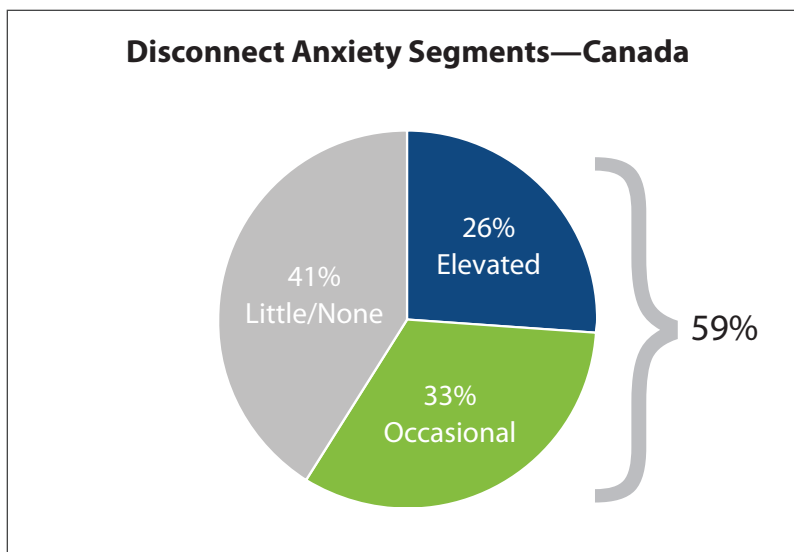
## WHAT IS DISCONNECT ANXIETY?

Disconnect Anxiety refers to various feelings of disorientation and nervousness experienced when a person is deprived of Internet or wireless access for a period of time.

In our research, we observed disconnect anxiety in people of all ages and backgrounds to varying levels of intensity. Anxiety resulting from 'BlackBerry blackouts' has been discussed in the popular press in the past year; however, other variants have received less attention to date.

## 59% EXPERIENCE ANXIETY WHEN DISCONNECTED

Overall, our research finds that 26% of the population exhibit significantly elevated levels of anxiety when disconnected<sup>1</sup>. In terms of age profile, 44% of this group are 12-24, 31% are 25-34 and 26% are 35-64.



A secondary group of 33% exhibit above-average levels of anxiety occasionally, depending on the situation. The balance, 41% are below average in their anxiety response when unable to use their cell phones or the Internet. This group is disproportionately older than average (i.e., majority being 50+).

<sup>1</sup>Disconnect Anxiety segments are based on a 15-item multi-question scale which scores individuals based on (1) time spent online and with wireless devices, (2) location and nature of use of wireless devices and PCs, and (3) intensity of participation in social media as well as responses to attitudinal questions.

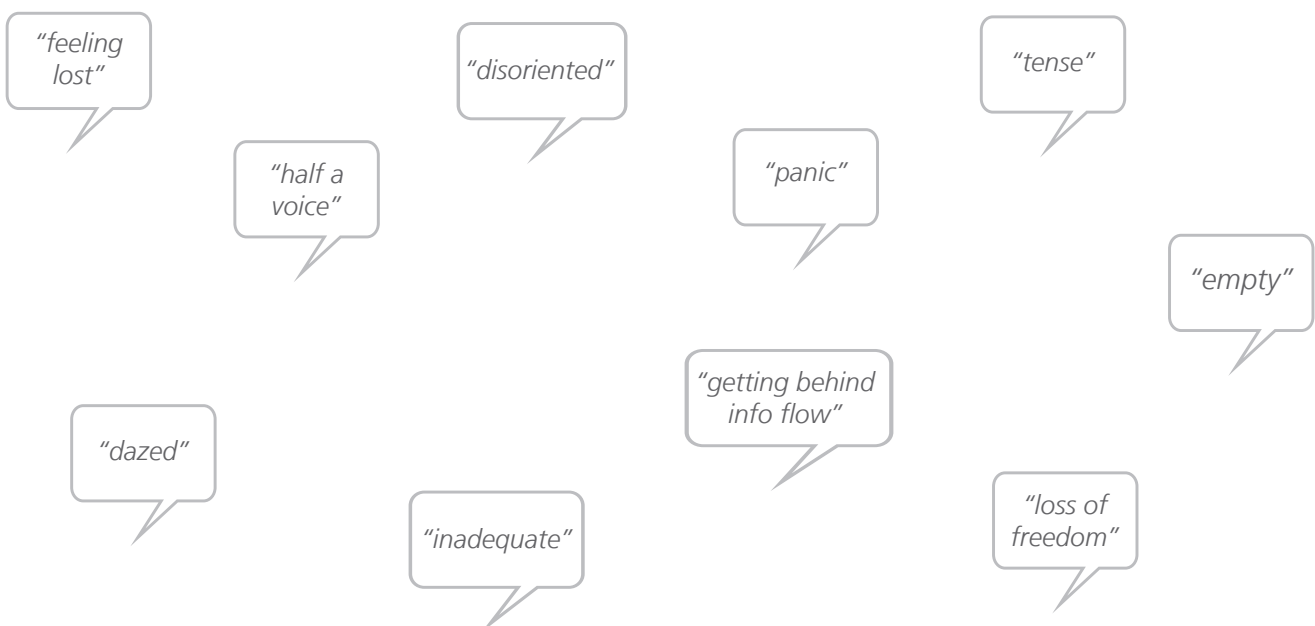
## WHY DO PEOPLE EXPERIENCE DISCONNECT ANXIETY?

Our research identified four main reasons why people feel anxious when disconnected. Disconnect anxiety is related to one or more of the following factors:

Factor	If disconnected, I will...
<b>Safety</b>	not be able to respond to an emergency
<b>Work</b>	miss important information (and promotion)
<b>Social</b>	miss the party
<b>Navigation</b>	get lost/unable to find my way

Depending on age, lifestage and employment factors, people may feel one, two or more of these factors at play at any given time.

## WORDS PEOPLE USE TO DESCRIBE THEIR EXPERIENCE WHEN DISCONNECTED



## SAFETY

Concern for safety is a major cause of disconnect anxiety. People often describe their cell phone as a “lifeline” or a “safety net” and believe they are safer when carrying it. Whether the phone presents the option to call for help in case of a car accident or to call a friend on a lonely walk home at night, just carrying one makes people feel less vulnerable.

In our research, people have expressed the belief that fellow citizens on the street are less likely to stop and help nowadays. In the next breath, they acknowledge that they are probably justified in their fear of doing so. As a result, carrying a wireless phone is almost universally perceived as a necessity. And not having access or service creates anxiety about personal safety and the safety of family members.

Being accessible to family is especially important for parents. Maintaining wireless connection gives the feeling one is in control and on top of situations.

Concern for safety of children including tweens and teens has in particular been a strong factor in parent-driven wireless adoption. 75% of American and 69% of Canadian teens had a cell phone as of November 2007, nearly double the rate in 2003.

% of Canadians who agree with the statement “*the world is not as safe as it used to be*”

70%

% of Canadians over 30 who agree that “*kids today face much more danger than when I was a child*”

76%

*“I primarily use the Treo. But my wife is actually pregnant right now. She’s been relying on the phone a lot right now just in case she needs to call me...”*

*“There was one time when I did feel a little bit helpless when I wasn’t able to use it [my phone]. I was in Death Valley California ... God forbid this rental car we have—if we get a flat... there was no signal, absolutely none, so I was just praying. No signal, absolutely no signal. That was the only time I have felt truly helpless without a wireless device... nothing around for 150 miles. What would I have done? Rub two stones together? Cry for help?”*

*“It’s almost like you lose your sense of freedom because you can’t just call someone ... it’s like you are cut off, you’re just a little person walking around. You might as well be in the 1800s, like you don’t have contact. We are so used to nowadays having that with us it is like security.”*

## WORK

Work expectations and workflow considerations are important contributors of disconnect anxiety.

The constant stream of information creates the feeling at least that the flow must be constantly monitored. While there are usually no written rules about staying connected, in many job situations the expectation is implicit.

*"In my office we don't really have any written rule that you need to stay connected. But if you are not connected there will probably be fewer rules for you to follow, because you won't be around. We're expected to stay connected."*

*"It used to be acceptable that you would be "out of pocket" while on vacation for a week (that used to be the purpose of a vacation) but now—with GSM, Internet cafes—people expect access to be ubiquitous."*

Being 'always on' or 'connected' is a response—and ironically a contributor—to the fact our culture is spinning faster.



*"Computers and technology may make our lives easier from some aspects, but they have also caused us to place urgency on everything, and I always feel rushed. Before computers, if you wanted to communicate with someone, you sent them a letter, and received a reply a week or two later. Now, with email, you send one out today, and you expect a reply by the next day, later the same day, or even within minutes."*

In addition, our research suggests that people begin to crave the idea of access to the world of information, almost as much as the messages themselves. Being plugged in validates your importance.

*"I think between leaving the house and getting to work I probably check my BlackBerry about 10 times, and that's on the subway...it's just the driven high stress world that we live in, managing issues, needing to stay on top of things."*

% of Canadians who took their cell phones with them during their vacation in the summer of 2007

88%

% in 2007 who agreed "devices like BlackBerry chain you to work more than they liberate you"

48%

% of laptop owners who took one on their last vacation

43%



Anxiety around disconnect experiences typically centers on missing out on important information. But our research suggests there is also an interesting variant which relates to concern about backlogs, i.e., a period of disconnect that will cause material to accumulate which will then take time to clear out.

*“Well you feel like you are lost. A couple of years ago I was in Asia traveling around and my wife and I went to Cambodia and the area that we were in NO ACCESS. So we went for four days and that was tough and when we got back to Hong Kong my wife knew I needed to sync up with my BlackBerry. So I am sitting on the train from the airport headed back to the city and I’m in the only little seat and I’ve got a flood, a flood of emails. And it’s just you are used to a certain type of access and efficiency so you can run your lifestyle the way you want to, then all of a sudden it’s been taken away—like someone taking away your drivers licence.”*

Among those taking a vacation in July 2007, 88% had a cell phone with them and over half of smartphone (e.g., BlackBerry) owners took their devices with them as they left for vacation, underlining the potential extent of the discomfort associated with being out of touch.

## SOCIAL

Among younger segments, the disconnect experience is panic inducing.

The ubiquitous messaging from friends has reached a new level with the rise of social networking. Never turning your cell phone off has been joined with “talking” to friends via Facebook.

Being out of the Facebook loop may mean missing invitations to social events and to be without the insider information that is valuable social currency among friends.

No one wants to be left out and staying connected via texting, IM and online via Facebook is the way to ensure it doesn’t happen.

*“Normally before eight o’clock in the morning you haven’t talked to your friends so the fact that now you are already corresponding before you even get to class and see people—you know you are in your PJs with your toothbrush hanging out and you are already talking to your friends. That’s pretty different from 2005 I guess.”*

*“I didn’t go on my computer for a week so then the weekend came and my brother and his girlfriend are like ‘we are going to this Christmas party’ and I’m like what?? How come I didn’t get invited, and then I go and look on my Facebook profile and there it is. No one bothers to pick up the phone and call you anymore. If you don’t check it, you’re out of the loop, like you don’t know what’s going on. So it’s the one thing. Now I don’t want to be left out, I’m going to check it all the time and see.”*

% teens and 20-29 year olds with cell phones who text message

80%

Average number of visits to Facebook profile daily

2.8

Number of friends a 20-29 year old Canadian has on Facebook

156

*"My cell phone is my social life. Getting calls from friends, text messaging about the night's plans. My whole summer is detailed in pictures on my phone. If I forget it at home I'm going nuts wondering what's going on, what I'm missing. It's my social life."*

*"I keep my cell phone on all the time and the only time I turn the ringer off is if I'm at work it will be on silent, if I'm sleeping it will be on silent, but the reason I don't turn it off is because I have caller ID so say if I'm sleeping and someone calls me or whatever, then the next day I can be like 'oh that person called me at 3:00 am in the morning, I wonder why?' Or if I'm in class I'll know who called me but if I turn it off it doesn't have caller ID for the calls I missed."*

*"When I'm away on holiday I love that people can still be in touch with me on my phone and I can pick it up if I need to."*

## NAVIGATION

People describe relying heavily on the devices they carry around to keep them organized, reminded of where they should be and what they have to do. And of course the devices also hold and carry information that we no longer have to keep in our memory.

*"Not to mention all the numbers. I lost my cell phone, I left my cell phone in a cab two weeks ago and I was just going crazy because all your numbers... the only other numbers you have are like strangely on Facebook."*

Our cell phones and laptops are an extension of ourselves, morphing into what writer/blogger Clive Thompson calls an "outboard brain."



*"The planning aspect... I utilize mine on the calendar for my 7 to 9 day. I utilize it a ton for the calendar, events, meetings, that's the nuance. Before I actually used to carry around one of those paper ones and then it is all synched with the computer and it actually buzzes when you have a meeting and it's more or less idiot proof. You know that at 10:00 I have to be here and 11:00 o'clock I have to be there and in that aspect it has changed my lifestyle because it's just an instantaneous update on a regular basis of where I am going."*

% of BlackBerry owners who used a wireless device or a laptop in the bathroom

51%

% who own a BlackBerry or similar smartphone and a regular cell phone

4%

## DISCONNECT ANXIETY ACROSS GENERATIONS

	How They Connect	Type of Anxiety	Behavioural Flags
<b>Tweens/Teens</b>	Texting, Instant Messaging, Facebook	<b>Social/Navigational</b> —cut-off from friends, their collective	<ul style="list-style-type: none"> <li>– IM on all the time as they work on the PC</li> <li>– Sleep disorders due to late night texting— inability to disconnect</li> <li>– Unable to concentrate on homework</li> </ul>
<b>Young Adults</b>	Texting, Facebook, Regular email, Instant Messaging	<b>Social/Work/ Navigational</b> —cut-off from friends, some work related	<ul style="list-style-type: none"> <li>– PC use increasing—likely to use cell phones in the washroom</li> <li>– Spend “too much time” on Facebook</li> </ul>
<b>Xers/Boomers</b>	Regular email/Mobile email (BlackBerry or similar), Facebook and texting generally if have kids	<b>Work/Safety</b> —mixed feelings when disconnected from work (anxiety on one hand and relief on the other)	<ul style="list-style-type: none"> <li>– “CrackBerry”</li> <li>– Withdrawal symptoms...</li> <li>– Kids pointing out parents’ addictive behaviour</li> <li>– Bad driving</li> </ul>
<b>Older Adults</b>	Regular email, some Instant Messaging or Skype with family	<b>Minimal</b> —cut off from family/ grandchildren etc.	<ul style="list-style-type: none"> <li>– Typically not an issue</li> </ul>

## ABOUT THE RESEARCH

The data in this report come primarily from SRG's *Fast Forward*<sup>™</sup> Canadian tracking study for 2006 and 2007. Three waves of research conducted in 2007 interviewed a total of 3,119 online Canadians aged 12 and older on all aspects of their use of and attitudes toward communications and entertainment technologies. A benchmark study conducted in October 2006 had a sample size of 2,302. Trend data referenced in the background section is drawn from previous *Fast Forward*<sup>™</sup> datasets, dating back to 1998.

The samples are nationally-representative of the Canadian online population and capture all important demographic segments such as teens, young adults as well as older age groups.

The interviews over this period were complemented by in-depth one-on-one and focus group discussions.

SRG's parallel tracking study in the U.S. (*Digital Life America*) also covered similar ground. A summary with U.S.-specific market data is available separately.

**FASTFORWARD**<sup>™</sup>

## ABOUT SRG

Solutions Research Group (SRG) is a consumer research firm with special expertise in media, technology, wireless, leisure, youth and multicultural markets.

Based in Toronto, the firm is best known for its syndicated quarterly tracking studies of consumer behavior, including *Digital Life America* in the U.S. and *Fast Forward* in the Canadian market. [www.srgnet.com](http://www.srgnet.com)