

CANADIAN PRESS / LEGER MARKETING

**Government Online:
A National Perspective**

Report



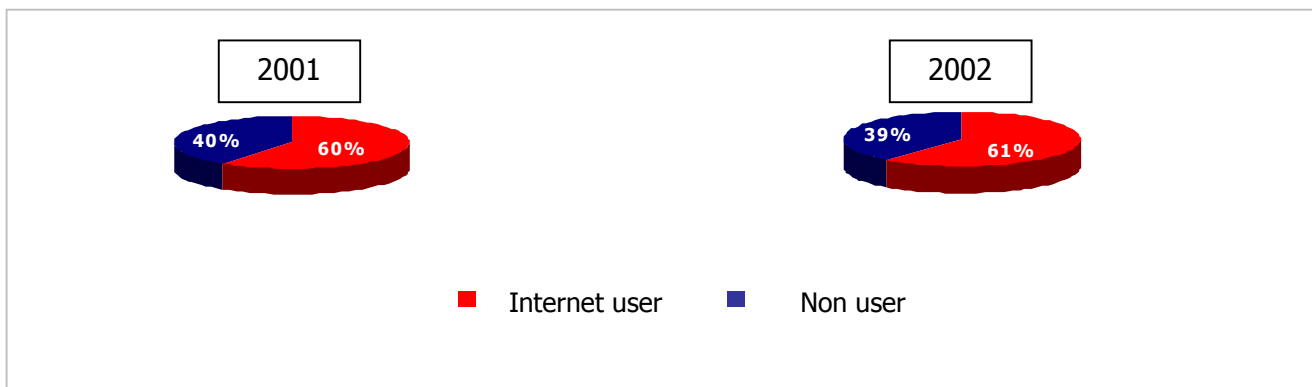
Level of Government Online Adoption

This study was conducted by Leger Marketing in August 2002 through telephone interviews among a representative sample of 1501 English- or French-speaking Canadians, within the context of the second Government Online research conducted by Taylor Nelson Sofres with 29,000 people in 31 different countries. This study is unique in that it examines the uptake of Government Online from a citizen demand perspective. The maximum margin of error obtained for a sample of 1501 respondents is of ± 2.5 , 19 times out of 20.

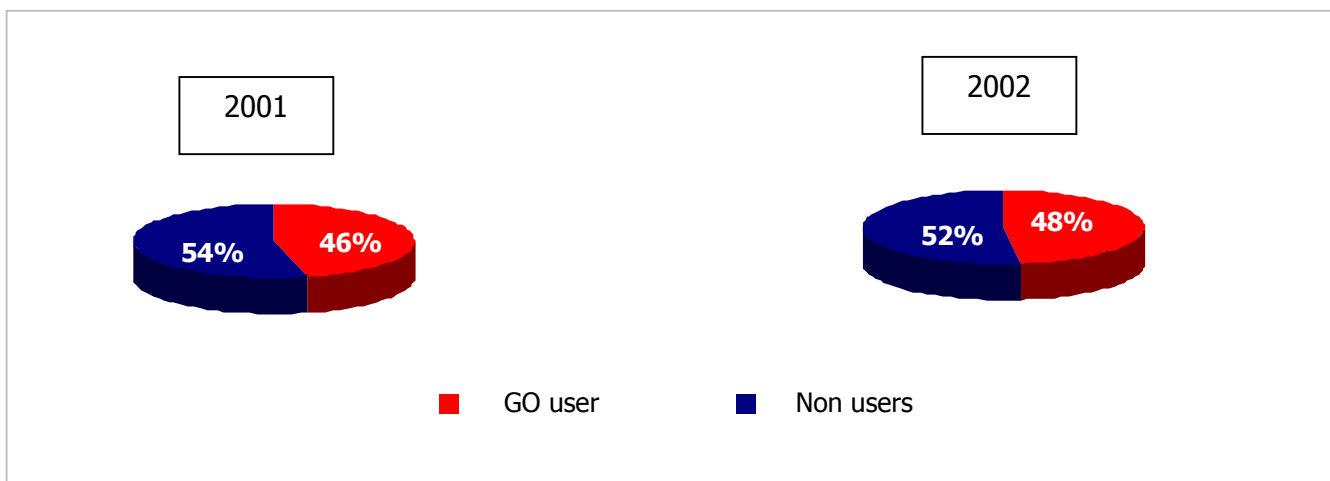
1 Government Online Usage

- ▢ Global Government Online usage increased significantly in 14 countries since it was first measured as 30% of the adult population surveyed had used Government Online in the last twelve months, compared to 26% in 2001.
- ▢ 48% of Canadians have used the Internet to access Government Online over the last twelve months, which is similar to 2001 (46%). This represents 70% of those who used the Internet within the last month.

Percentage of Population That Are INTERNET USERS (Last Month)



Percentage Of Population That Are GOVERNMENT ONLINE USERS (Last Twelve Months)



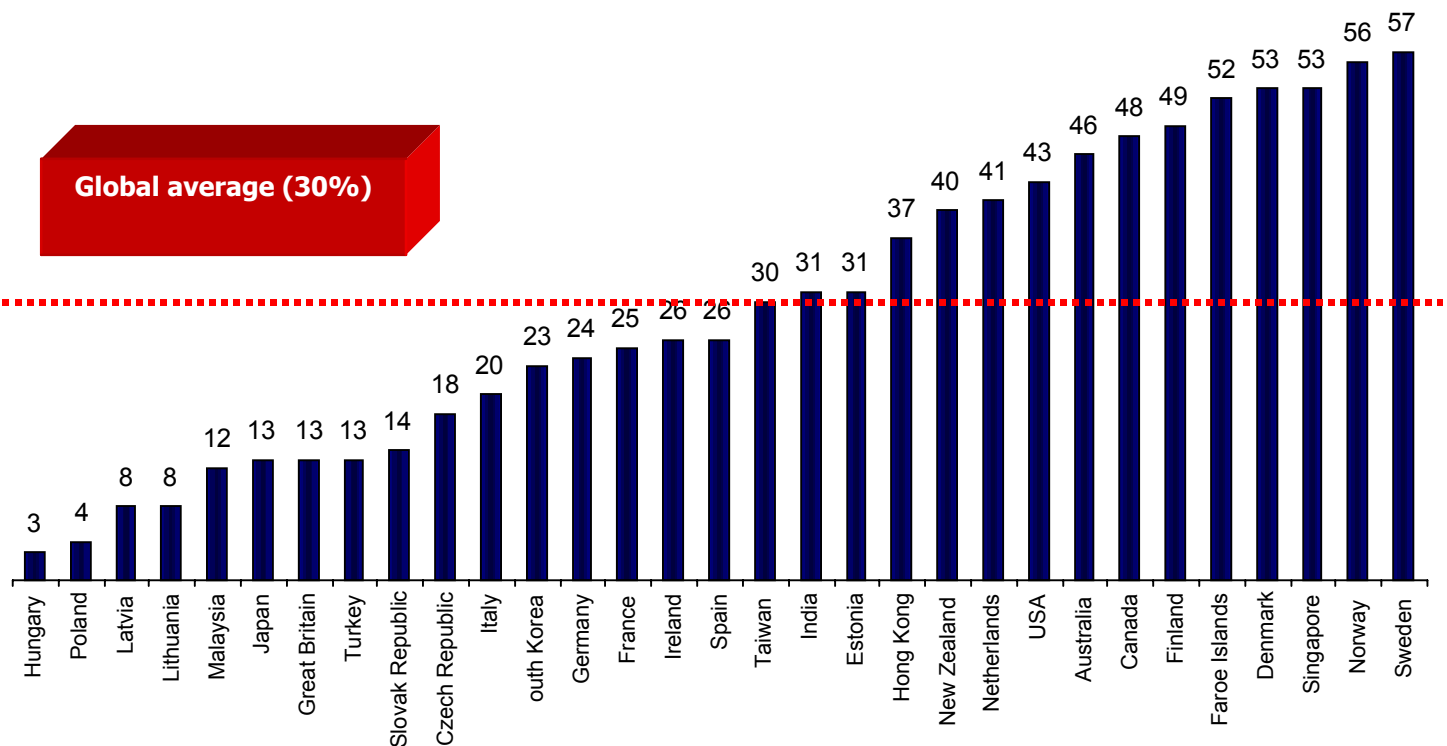
- More than half of Ontarians (55%) have used Internet to access Government Online services. In Quebec, British Columbia and Alberta the proportion reaches 46%, while the Atlantic provinces (38%) and the Prairies (37%) have lower penetration.

n=1501	GO users
Ontario	55%
Alberta	46%
British Columbia	46%
Quebec	46%
Atlantic Provinces	38%
Prairies	37%
Canada	48%

2 Canada on the International Level

- Canada has high penetration Government Online (48%), and ranks 7 out of the 31 countries surveyed.

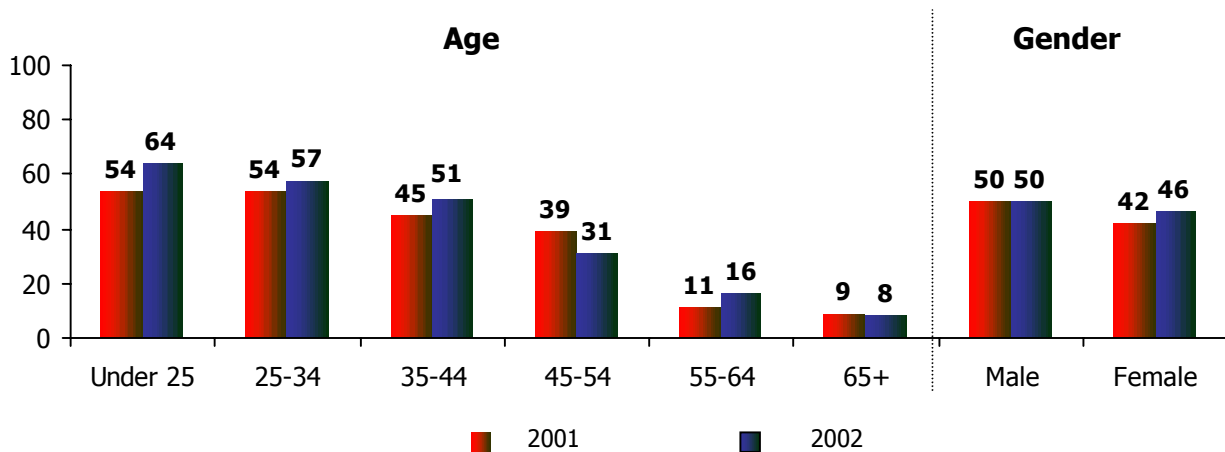
Percentage of population who used government online services in the past 12 months
n=1501



3 Who is using Government Online?

- □ Incidence of Government Online significantly increased among those aged 25 years or less (from 54% in 2001 to 64% in 2002), and continues to higher than average in the younger age brackets (18-24 years, 64%; 25-34 years, 57%; 35-44 years, 51%). Furthermore, Canadians with higher household income and higher education levels were also more likely to use all Government Online services than others.
- □ Usage decreases with age and is lowest among those aged 65+ (8%). Males remained more likely to use Government Online (at 50% in both 2001 and 2002), however usage by females has increased (from 42% in 2001 to 46% in 2002).

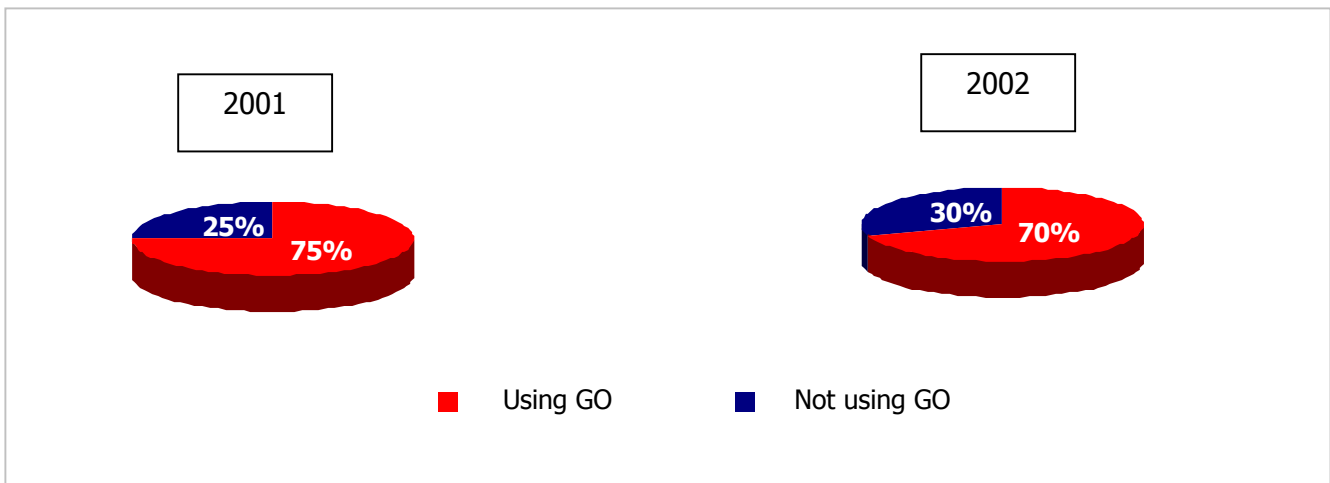
Percentage of population who used government online services in the past 12 months n=1501



4 Internet users and Government Online Usage

- ▶ Between 2001 and 2002, the proportion of Internet users that are using Government Online Services in Canada has decreased by 5%, from 75% in 2001 to 70% in 2002.

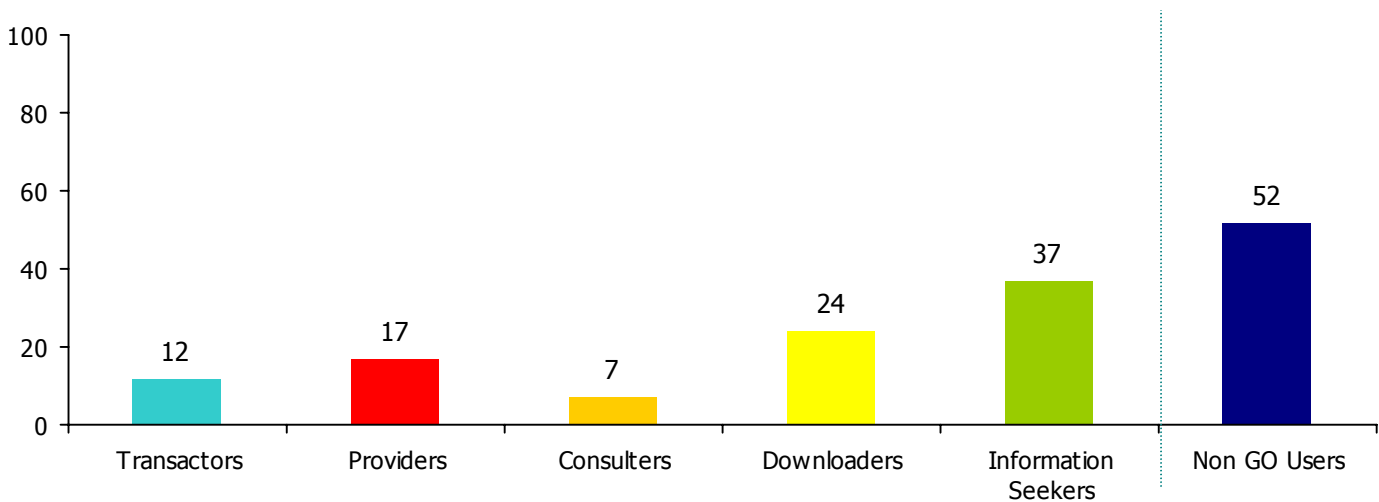
**How many Internet users are using Government Online?
N=Internet Users (61%)**



5 All Government Online Usage in 2002

- ▶ The major Government Online use remains Information Seeking (37%), however increase in usage of all Government Online services was recorded. The number of those downloading significantly increased from 19% to 24% of all Canadians.
- ▶ Nonetheless, a greater proportion of Canadians aged between 25 to 44 years old are transacting and consulting compared to other age groups.

**Government Online Usage?
N=1501**

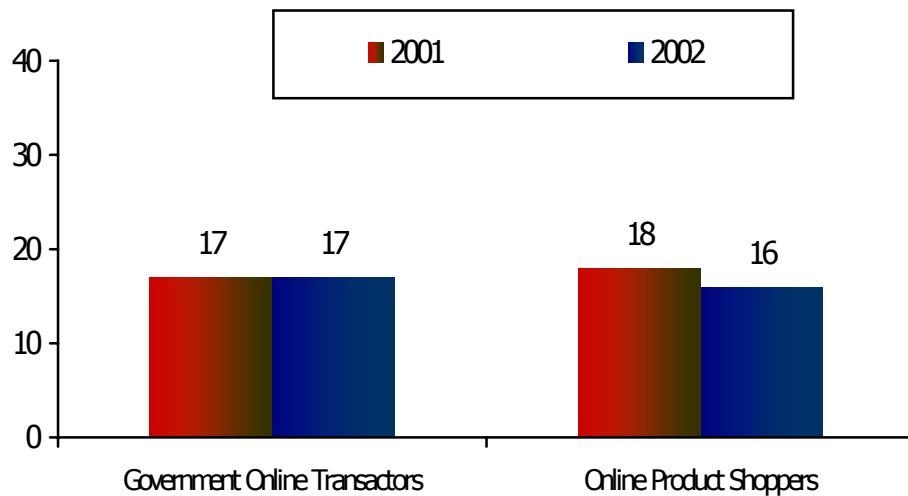


Government Online Changes From 2001 to 2002

	2001 n=1507	2002 n=1501	Change From 2001
Nett GO Usage	46	48	+2
Transactors	10	12	+2
Providers	16	17	+1
Consulters	N/A	7	-
Downloaders	19	24	+5
Information Seekers	36	37	+1
Non GO Users	54	52	-2

6 Government Online Transacting Compared to Other

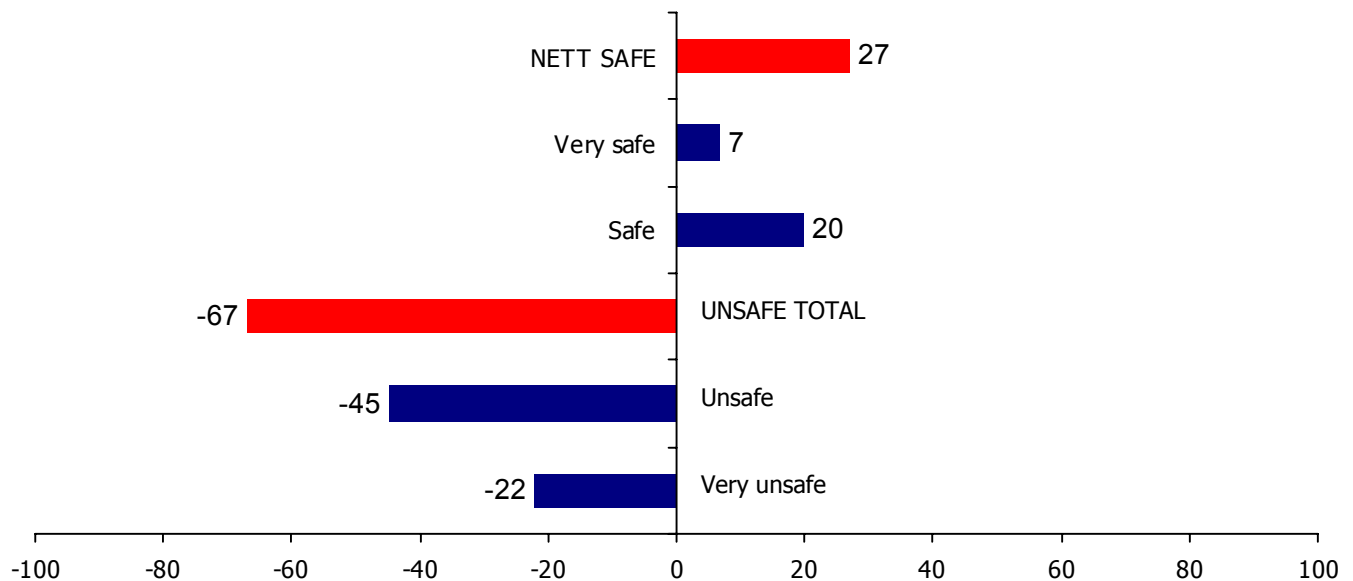
- ▶ 17% of Internet users have made a Government Online transaction in the last twelve months.
- ▶ This compares favourably with purchase of goods over the Internet. (Global ecommerce study 2002).



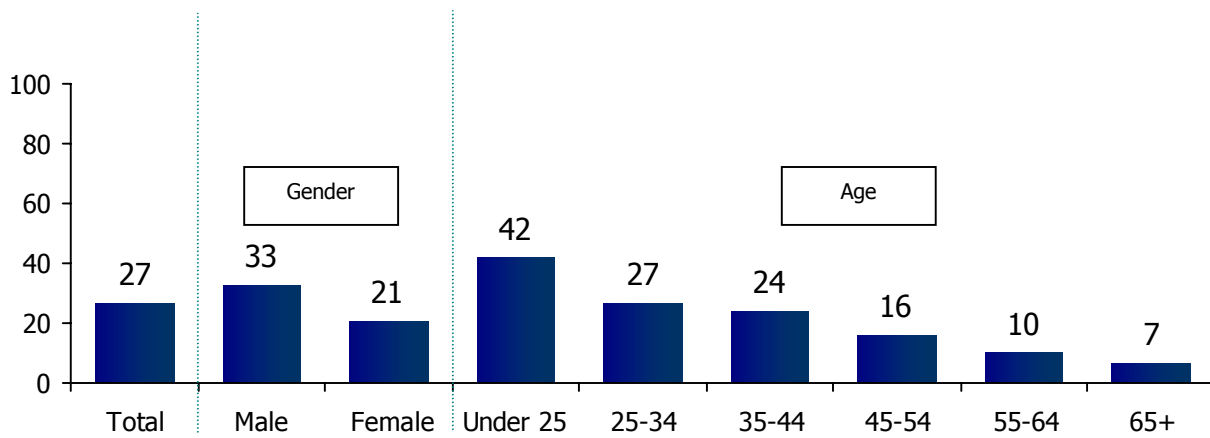
7 Perception of Government Online Safety in 2002

- ▶ 27% of Canadians consider it is safe to use the Internet to provide the Government with personal information (from 30% in 2001). As in 2001, 67% consider it is unsafe, however a significantly greater number considered it to be "Very Unsafe" (from 37% in 2001 to 45% in 2002).
- ▶ The perception of 'safe' continues to be higher among males (33%) than females (21%), those aged under 25 years or less (42%), and those with higher levels of education and from higher income households.

Question: *How safe would you feel about using the Internet to provide the Government with this sort of personal information (credit card number, bank account number or annual income)?*
N=1501



NETT SAFETY BY GENDER AND AGE
N=1501



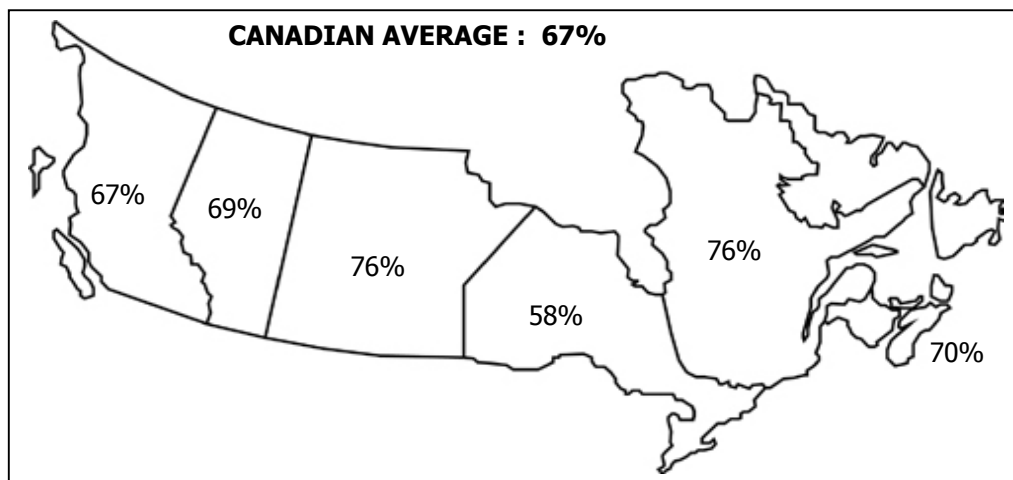
Government Online Changes From 2001 to 2002

	2001 n=1507	2002 n=1501	Change From 2001
Nett Safe	30	27	-3
Very Safe	6	7	+1
Safe	24	20	-4
Nett Unsafe	67	67	-
Unsafe	30	22	-8
Very Unsafe	37	45	+8

- ▶ The population from Ontario feels safer than other Canadian regions to provide Government online with personal information, such as credit card or bank account numbers and annual income.
- ▶ On the flip side, Quebecers perceive providing this kind of information through Internet very unsafe (76%).

n=1501	Safe	Unsafe	Don't know/Ref
Ontario	33%	58%	8%
Atlantic Provinces	26%	70%	4%
Alberta	24%	69%	7%
British Columbia	25%	67%	7%
Quebec	20%	76%	3%
Prairies	18%	76%	7%
Canada	27%	67%	6%

Proportion of Canadians who feel providing Government services online with personal information is unsafe.



- ▶ Perceptions of safety are highest among Providers (50%), and similar among other GO users (Transactors and Downloaders 44%, Information Seekers 46%, and Consulters 39%) .
- ▶ The perception of safety falls among non-Government Online users (13%) which would indicate safety is a barrier to uptake. Security concerns about providing personal information over the Internet does not always prevent people from transacting with Government Online as 54% of those who have transacted online considered that it was unsafe to provide the Government with personal information. This has increased from 45% in 2001.

Is Safety A Barrier To Adoption?
N=1501

