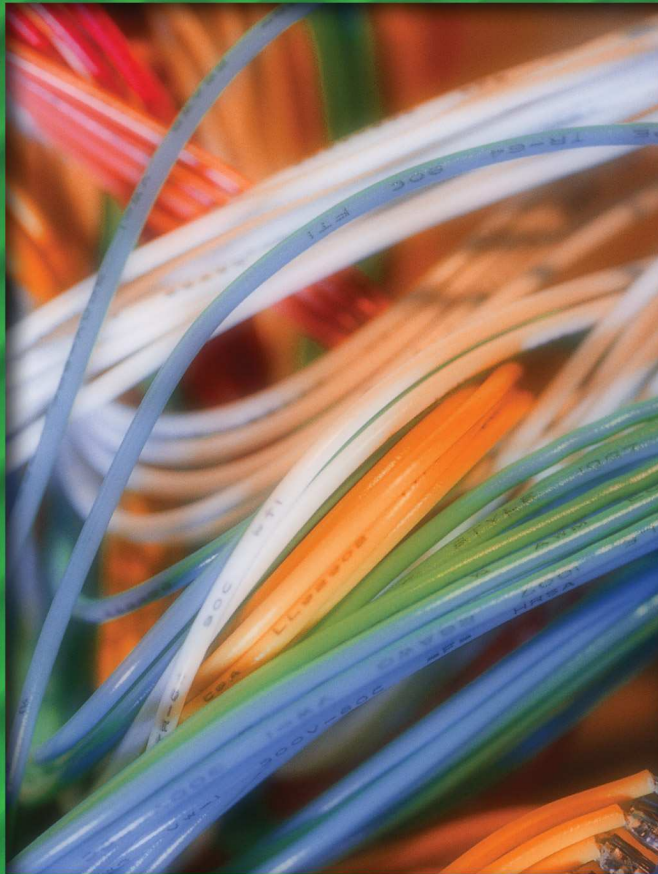


2006 • 2007

PART OF THE **INFORMATION HIGHWAY** STUDY



**EKOS**

Delivering Services to Canadians



**Delivering Services to Canadians**



## About the study

Launched in 1996, EKOS' Rethinking the Information Highway study grew out of a need to better understand how information technologies were reshaping the environment governments and companies were operating within.

Now in its seventh edition and more than 20 surveys later, the study is one of the largest and longest running studies in this area in Canada today. Given its big-picture focus on the full range of issues relating to technology usage, such as the interaction between traditional and electronic service delivery channels and privacy and security-related issues, Rethinking the Information Highway remains one of the most relied upon sources for senior decision makers who are tasked with guiding their organization through what continues to be a rapidly changing environment.

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## Introduction

With the dramatic technological advancements made in the past decade, governments across the country are adjusting to its significance and impact in the realm of service delivery. The Government of Canada is no different; modernizing the service delivery network in order to provide citizens with the best approach possible when it delivers programs and services to better suit their needs — the approach embodied in Service Canada.

In today's environment, many social, economic and technological changes occur over increasingly shorter periods. All governments are under mounting pressure to offer citizens not only the best and most up to date methods of interaction but also in a way that is as cost effective and timely as possible, and in a way that meets their preferences.

In many regards, this modernization of service delivery networks in the public sector is also occurring at the same time as similar initiatives in the private sector; often complementing one another. While Canadians are rapidly adjusting to doing their banking online, they are also adjusting to interacting with governments online.

This report is designed to focus on the evolving service delivery environment in Canada, and to provide decision makers in this area with a sense of the current trends, expectations and preferences of Canadians' interactions with the government and how they are changing.

# Overview

The service delivery environment has changed dramatically since 1999 when the Government of Canada set out to make all government information available online by 2004. Steadily, the Internet has become a prevalent source of information and has now revolutionized how Canadians interact with their government; however, despite progress made by the government in improving online resources, there is still a considerable amount of work that needs to be done.

## The broad service delivery environment

### The Canadian public as mature users:

With little growth in Internet usage compared to previous years, Canadians are established in their online behaviour, including their methods of interacting with the government. Increasingly aware of what works best for them, Canadians are less likely to change how they do their interactions unless there is an improvement in value proposition.

### Service delivery matters:

Service interactions are often the only form of personal contact Canadians have with the federal government. As a result, there is a direct correlation between service satisfaction and overall government approval, with low satisfaction leading to poor government performance and high satisfaction drawing parallel to positive government outlook. It should also be noted that government interactions are occurring against a backdrop of declining trust.

## Broad perceptions

### Positive outlook:

Canadians remain optimistic about improvements in the delivery of services. Those expecting improvements in ease, quality and speed of transactions easily

outnumber those expecting deterioration; however, those expecting the overall delivery of services to remain the same continue to increase.

### The privacy and security shift:

Back in 2001, there were more Canadians expecting deterioration than those expecting improvements. Today, there has been a reversal with more Canadians expecting improvements; a trend also illustrated by the fact that almost 1 in 2 Canadians today believe governments collect only the information they need to deliver services to Canadians (the highest it has been).

## Recent contact with the federal government

### The web has not become any more entrenched in the last few years:

The shift in movement towards the electronic channel, both in actual usage and preferences, has either slowed down or stalled. These are surprising developments, as Canadians continue to use the phone as their main method of contact and yet persist in giving it lower satisfactory ratings; a pattern that suggests Canadians are constrained in their method of contact (i.e., there are many interactions that still cannot be done online.)

### Multiple Channels:

Multiple Channels remain an integral part to the service delivery environment. Due to the nature of government interactions, a variety of factors contribute to Canadians turning to multiple channels to fulfill their government contact. Led by complexity of resolving the cause of contact, the reasons for multiple channels are also likely to involve inefficiencies and being told to do so.

## Channel preferences

### Equal division among telephone and Internet preferences:

Canadians are increasingly in one of two camps of almost relatively similar size; those that prefer the telephone as a means of contact and those that prefer the electronic channel. Despite an overwhelming majority of Canadians expressing for some time an interest in having the majority of their contact online, the telephone continues to hold a strong position in overall preferences.

### Interaction type influences preferences:

The nature of the interaction often affects the choice or preference of the method of contact. The Internet continues to be the main preferred method of interaction for those seeking information while the telephone is preferred for specific questions. When it comes to interactions that require security, Canadians express a preference for in-person interaction.

### Differences in preferences:

Demographically, there are some distinct differences along both generational and economic lines. For the most part, Canadians under the age of 45 prefer the Internet while those older tend to favour the telephone in their government interactions. Also of interest is the overall increase in net preferences along income levels and users and non-users.

## Online channels

### Expectations:

Gradually Canadians are embracing the possibility of using the Internet as a primary method in their government interactions. Almost half of all Canadians agree that they would do their government interactions online if possible; similar to the amount of Canadians that believe the Internet is an effective way for governments to communicate with Canadians about programs and services.

## Concerns with the Internet:

Despite strong expectations, there is a continued reluctance to perform some interactions online among Canadians, with 6 in 10 expressing apprehension. Security and personal privacy are of the highest concern as Canadians express some reluctance in conducting financial transactions and providing personal information.

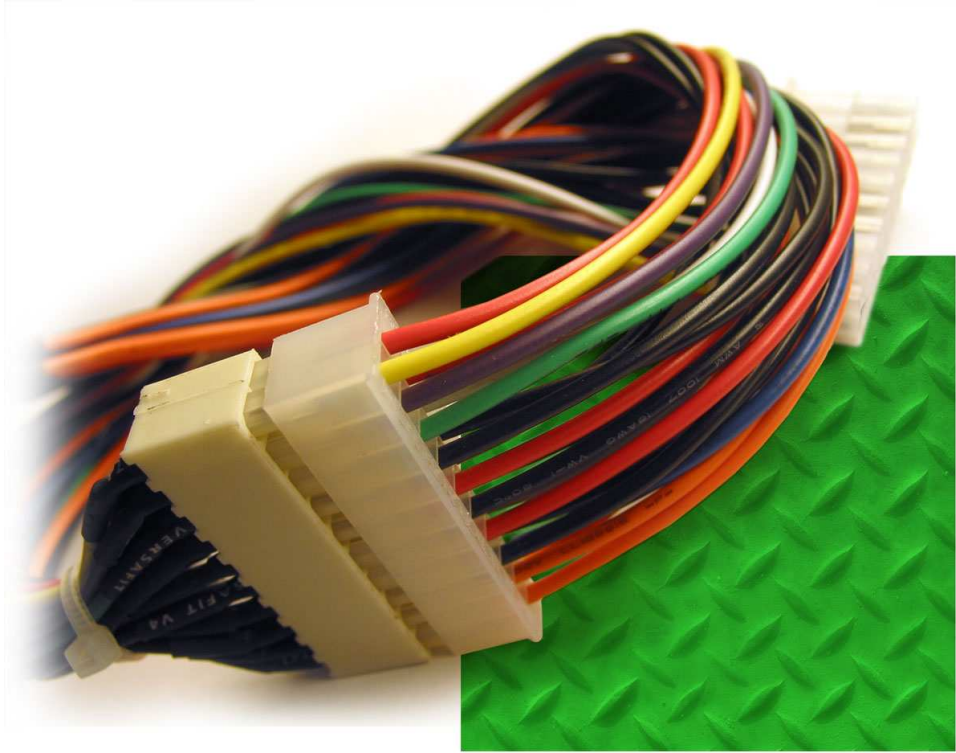
### Online channels — direct use and intermediaries:

Somewhat paradoxically, the Internet continues to be an important channel for both users and non-users alike with non-users still making use of online government resources through a third party. Although the majority of these interactions are attributable to submitting income taxes, there are a variety of other activities that are seeing a consistent amount of use. The amount of Internet users that have done some sort of government activity continues to increase with only a very small number — about 1 in 10 — that have not had any common type of interaction.

## Fostering uptake of online channels

### Lack of awareness and value proposition:

There continues to be considerable room for further growth in the uptake of online channels. There are, however, a variety of factors limiting growth. First, and foremost, most Canadians remain extremely unfamiliar with the services that governments provide online. In fact, there have been virtually no significant improvements in overall awareness over the past few years. Equally important is the need for a strong value proposition. Despite the obvious benefits of the online channel, many Canadians remain unconvinced about the overall value proposition in part reflecting their infrequent contact with governments. The key will be to build on the considerable progress to date while not losing sight of the need to promote greater awareness and strengthen the benefits of contact through the online channel.



## **The broad service delivery environment**



## Highlights

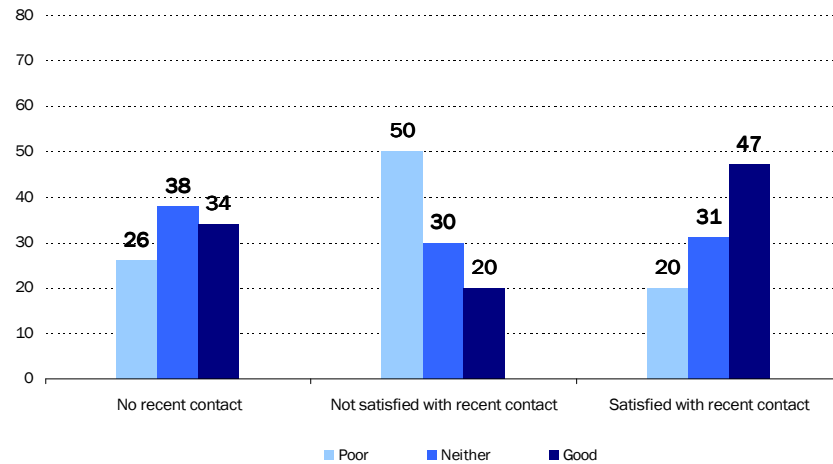
- Service delivery influences broader perceptions, including the Canadian public's overall outlook on the broad performance of the government. Canadians who are satisfied with recent interactions are far more likely to rate the government's overall performance positively than those without any contact or those who are not satisfied with their recent contact.
- While Canadians overwhelmingly believe that the greater emphasis on the use of information technology by governments is a move in the right direction, they are more divided on whether governments are at the forefront in its implementation.
- Overall improvements are expected in the broad service delivery environment five years from now, with Canadians expecting improvements far outnumbering those expecting deterioration.
- There has been a sizeable shift in outlooks relating to the broad privacy and security landscape. In 2001, more Canadians were expecting deteriorations than improvements. Today, the situation is reversed.

**Service** interactions are often the only form of personal interaction Canadians have with the federal government in a typical year. Not surprisingly, their **interactions are essential in establishing their overall outlook on the broader performance of government**. In other words, service delivery issues matter and should not be considered segregated from the various aspects that form an important part of Canadians' views.



### Service delivery influences broader perceptions:

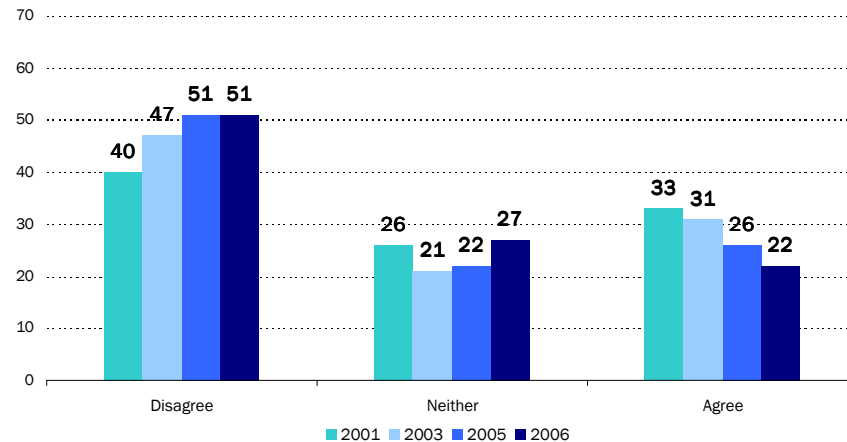
Canadians who are satisfied with recent interactions are far more likely to rate the government's overall performance positively than those without any contact and those who are not satisfied with their recent contact.



**Q:**  
How would you rate the overall performance of the federal government?  
(Base: All Canadians; July 2006, n=2294)

### Modernization is occurring against a backdrop of declining trust:

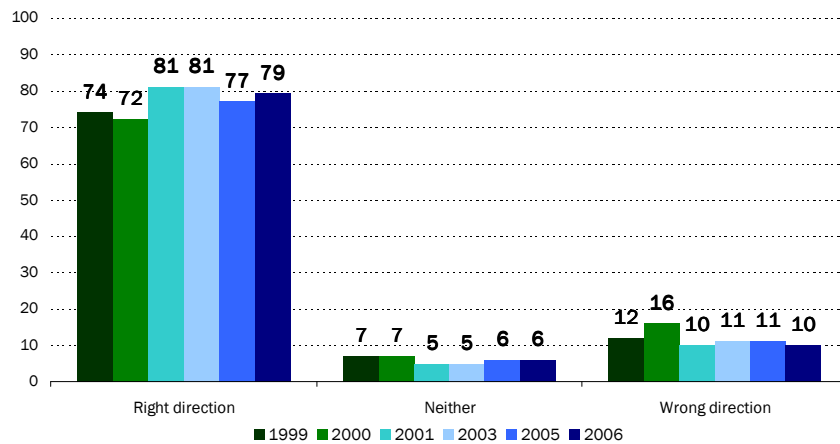
While it is clear that there is a strong linkage between service delivery and broad perceptions of government, it is important to take into account the current efforts by governments across the country to modernize service delivery are occurring against a backdrop of declining trust.



**Q:**  
Governments can be trusted to do the right thing.  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

### Emphasis on information technology seen as a move in the right direction:

The overwhelming majority of Canadians continue to believe greater emphasis on technology is a move in the right direction, reflecting in large part the high levels of comfort with technology in general.



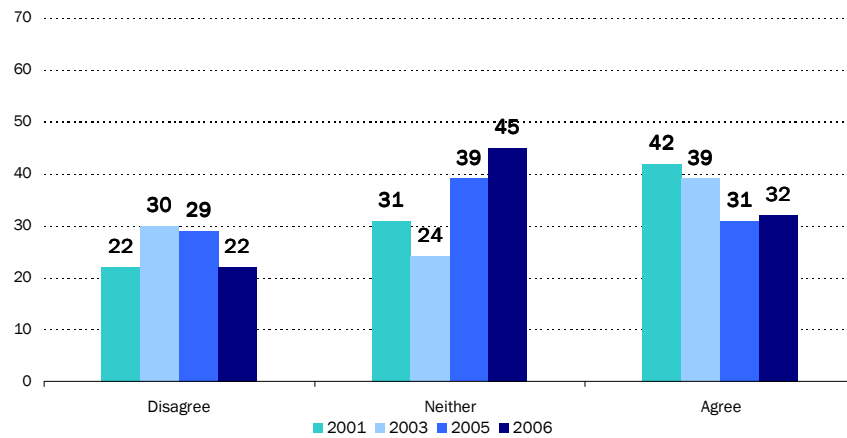
**Q:**

All things considered, would you say that the greater emphasis on the use of information technology by governments is a move in the right direction or the wrong direction?

(Base: All Canadians; July 06, n=1124)

### Mixed judgments on government implementation of new technology:

Despite positive views on the governments' greater emphasis on technology, Canadians remain divided on whether governments are at the forefront when it comes to implementing new technology.

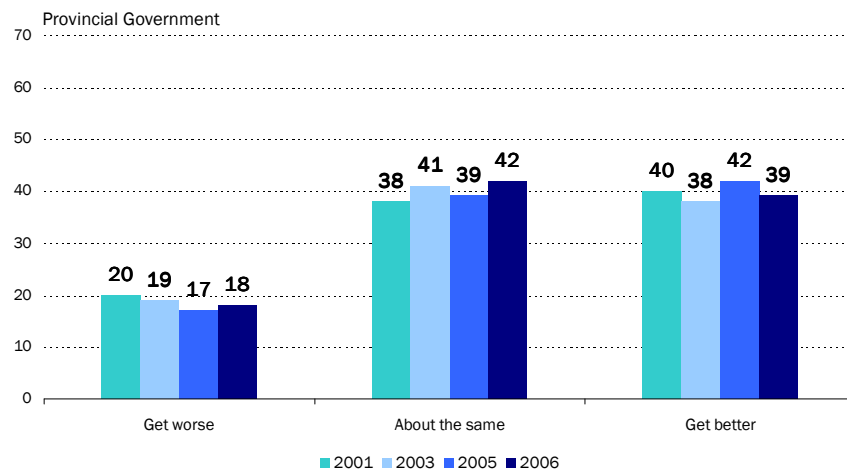
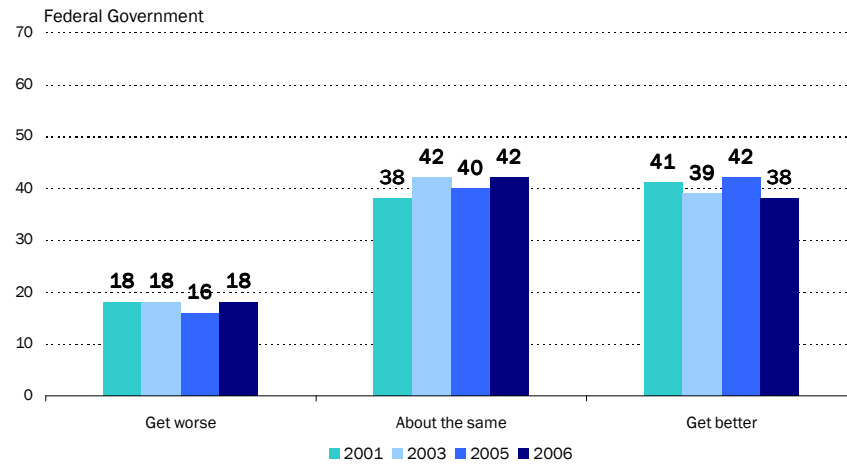


**Q:**

Government is on the leading edge in implementing new technology  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

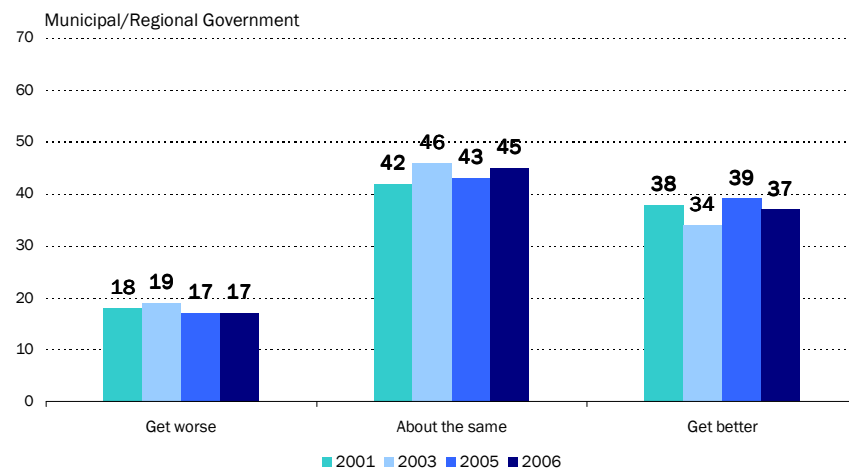
### Strong lean towards seeing service delivery getting better:

Canadians hold a decidedly positive outlook in relation to the service they will get. Although the largest proportion expect service from governments will stay relatively the same, those who predict an improvement outnumber those expecting a weakening by a 2 to 1 margin.



**Q:**  
Would you say that service from different levels of government will be better or worse five years from now?  
(BASE: All Canadians; Aug./Sept. 06 n=1586)

**Strong lean towards seeing service delivery getting better (continued):**

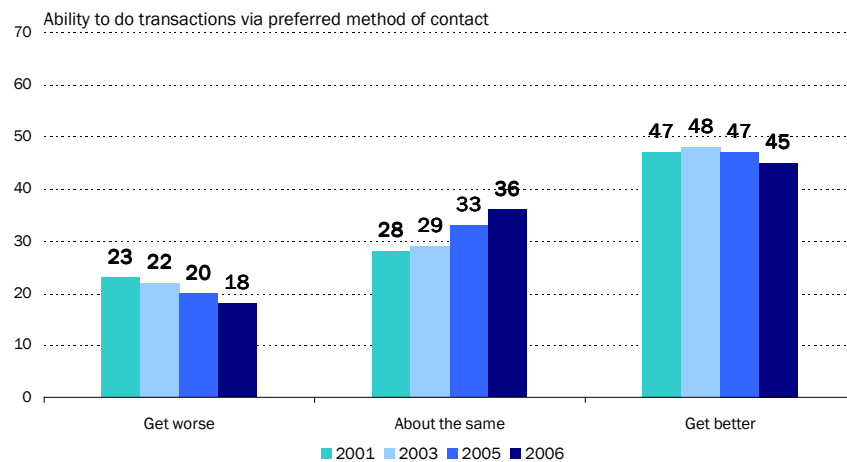
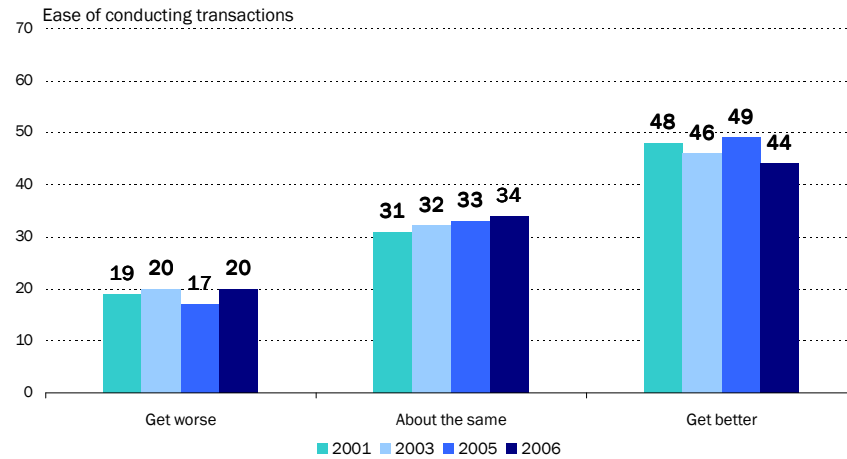


**Q:**  
 Would you say that service from different levels of government will be better or worse five years from now?  
 (BASE: All Canadians; Jan. 05, n=1586)

**With** Canadians expecting improvements in the delivery of services, there is overall optimism in regards to ease, quality and speed of transactions. The **most significant change, in Canadians' expectations, however, is found in relation to privacy and security.** Not only are Canadians far less likely to expect deteriorations looking forward, but they are also more likely to expect improvements, a reverse of the situation only a few years ago.

### Positive expectations in relation to ease and choice:

When it comes to ease of conducting transactions and the choice in channels, Canadians are almost twice as likely to see things improving in the future as those expecting deteriorations.

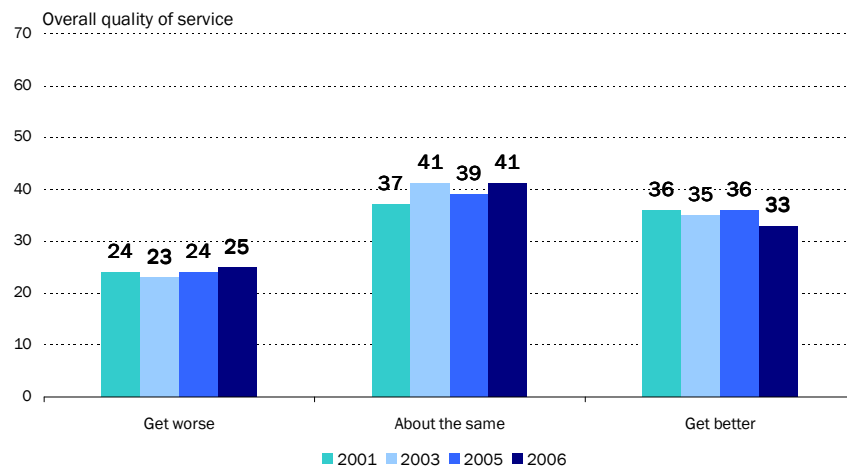
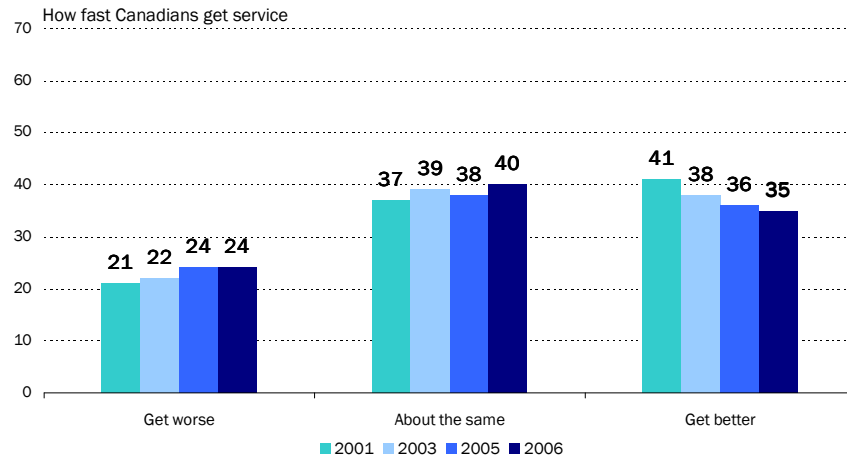


#### Q:

Thinking about all levels of government, would you say that service will be better or worse in . . . five years from now?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

### Quality and speed remain essential factors in improving service delivery:

Canadians still remain optimistic, albeit not as much on ease and choice, in expecting improvements to speed and overall quality of service.

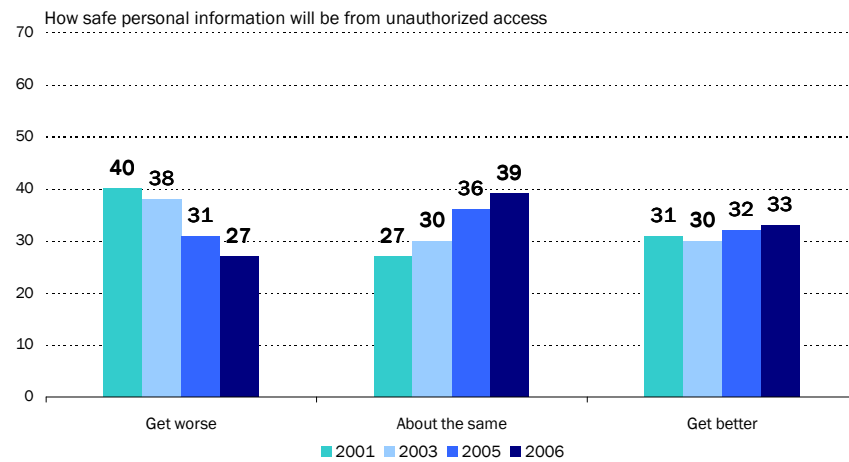
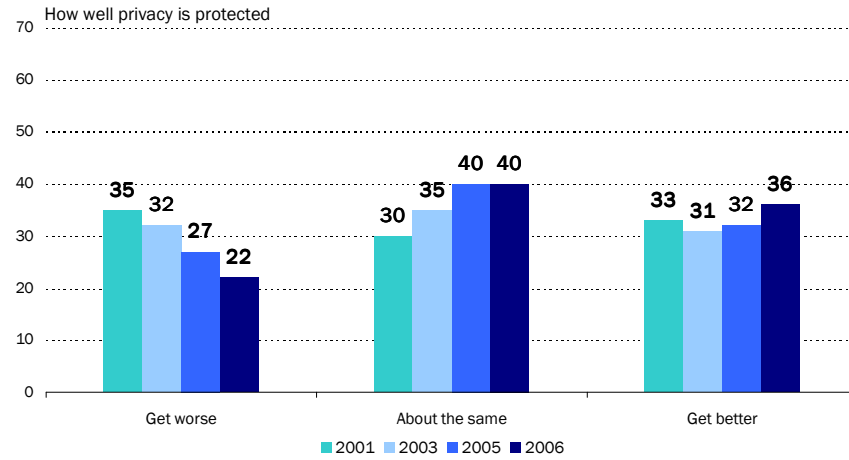


**Q:** Thinking about all levels of government, would you say that service will be better or worse in . . . five years from now?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)



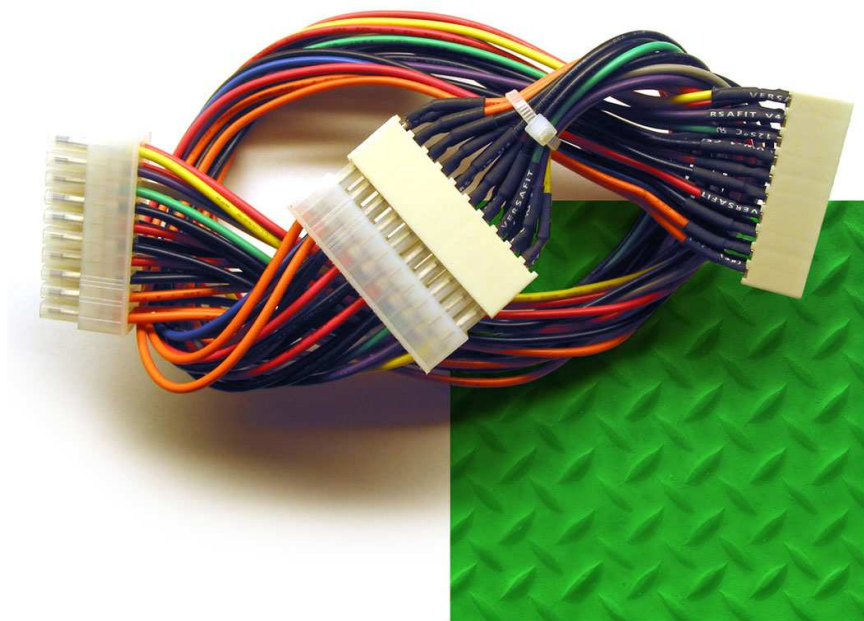
### Privacy and security concerns continue to improve:

There has been a sizeable shift in outlooks relating to the broad privacy and security landscape. In 2001, more Canadians were expecting deteriorations than improvements. Today, the situation is reversed.



**Q:**

Thinking about all levels of government, would you say that service will be better or worse in . . . five years from now?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)



## **Recent contact with the federal government**



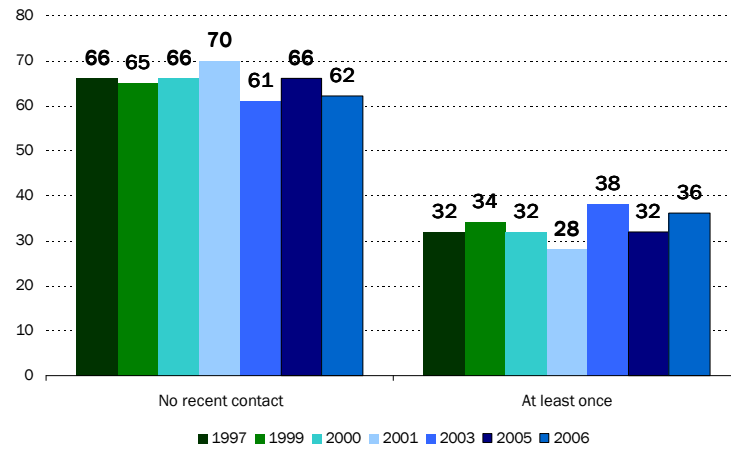
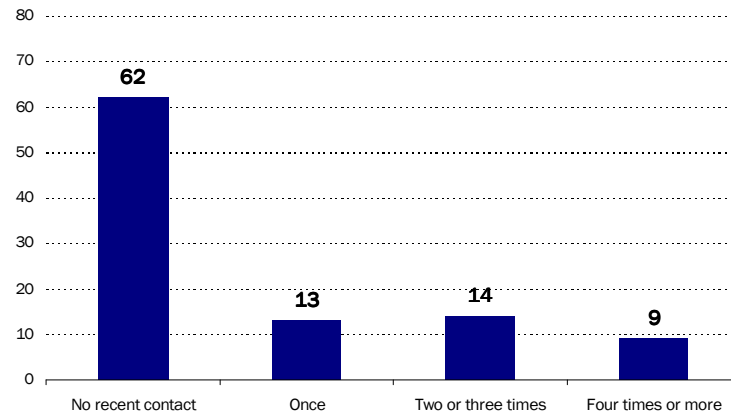
## Highlights

- Despite significant changes to the broad landscape, Canadians are still having recent contact with the federal government for personal reasons at a rate similar to previous years.
- After sizeable growth in the online channels, there has been little change in the overall broad patterns with the telephone channel continuing to be the most common. Online channels are, however, clearly established and are the second most commonly used.
- Uses of multiple channels continue to play an essential role in defining the service delivery environment, reflecting a variety of reasons, including the complexities of interactions, inefficiencies and being told to use another channel. About 4 in 10 Canadians with recent contact report using multiple channels, a pattern that has remained relatively constant.
- Although Canadians continue to express similar levels of overall satisfaction with their recent contact, those using the Internet channel have the highest level of approval while the telephone is among the lowest.

**Despite** significant changes to the broader landscape, there has been relatively little change in the extent to which Canadians have had recent contact with the federal government since the late 1990's. Over the same time frame, however, **the online channel has fast become a key method of contact and is now clearly established as the second most commonly used channel**. That said, there has been little change in overall broad patterns in the past few years.

### Contact with the federal government remains stable:

Largely unchanged over the past decade, a little over a third of Canadians report having had contact with the federal government in the past 3 months for personal reasons.



**Q:** Including in-person, mail, telephone contact and email/Internet, how many times have you had contact with the federal government (for a service or information) for personal, rather than work related reasons over the last three months?  
(Base: All Canadians; July 06, n=2294)

# Reason for last contact with federal government

(Per cent)

	July 06	METHOD OF CONTACT			
		Telephone	Mail	In-person	Internet/Email
Income taxes/CRA	26	24	41	7	48
Obtaining information	11	12	6	10	21
Employment Insurance	6	4	1	7	13
Pensions CPP/Old Age Security	6	8	8	2	6
Passport	5	4	1	26	4
Canada Child Tax Benefit	4	4	4	1	10
GST refund	3	5	6	0	1
Immigration/Citizenship	2	2	0	5	5
Employment/Job bank	2	1	1	2	10
Health Canada	2	2	1	6	8
Update information	2	3	0	0	1
Student loans	1	1	1	0	6
Letter, written	0	0	2	0	0
Other	18	19	14	17	45
DK/NR	7	8	9	0	8

## Q:

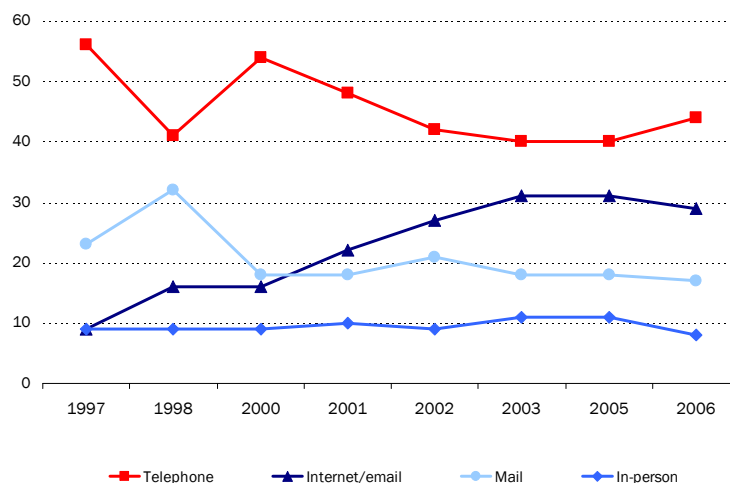
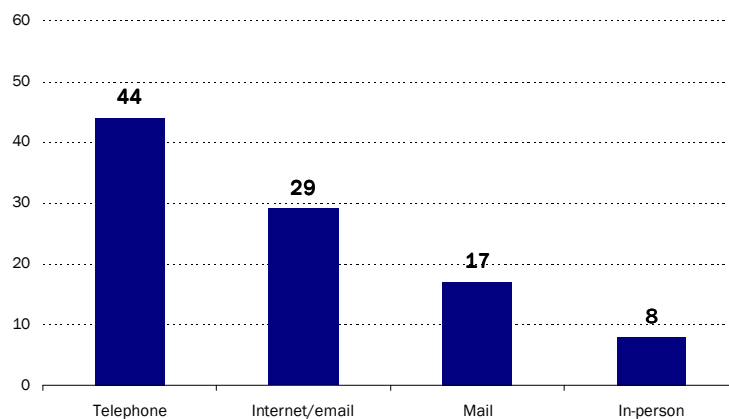
Can you tell me what your most recent contact was for?

(BASE: Canadians with recent contact with federal government; July 06, n=833)



### Service channels become more defined:

After significant shifts between the late 1990s and early 2000s, there has been a more stable pattern in relation to channel usage in recent years. While the telephone channel is still most common, the online channels have become firmly entrenched as the second most common channel. Despite less usage, the mail and in-person channels remain important.

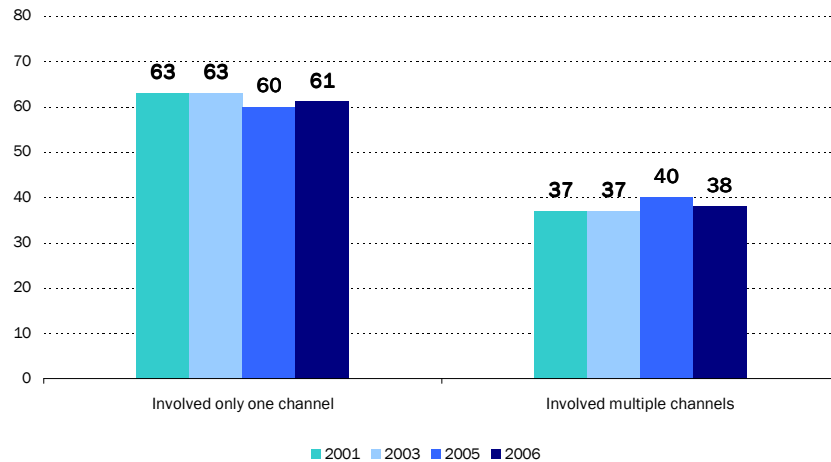


**Q:** Thinking now of your most recent contact with the federal government, what was the method of contact?  
( BASE: Those with recent contact with federal government, July 06, n=845)

**A variety of factors are responsible as to why about 4 in 10 of all Canadians having had recent contact with the government used more than one channel.** Led by the complexity of most government interactions, the reasons for multiple channels are also likely to involve inefficiencies and being told to use an alternative method.

### Multiple channels still key part of the environment:

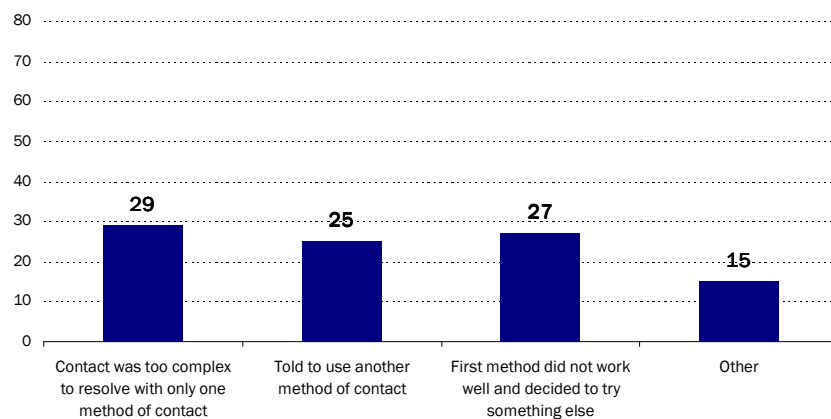
Given the nature of many government interactions, it is not surprising to see that 4 in 10 Canadians who have had recent contact used multiple channels in their interactions.



**Q:** Thinking again about your most recent contact, did it involve any other methods of contact other than ...?  
(Base: Those with recent contact with the federal government; July 06, n=826)

### Various reasons responsible for multiple channel usage:

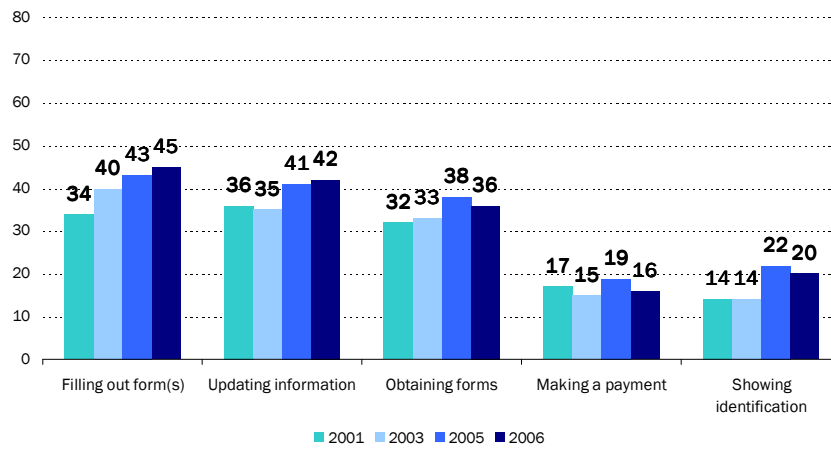
Although the reasons citizens use multiple service channels vary considerably — complexity, staff direction, and inefficiencies all figure to have the same effect on why Canadians turn to using more than one channel.



**Q:** And which of the following best describes why you used more than one method of contact?  
(Base: Those who used more than one contact with the federal government; July 06, n=313 )

**Recent interactions continue to involve a wide range of activities:**

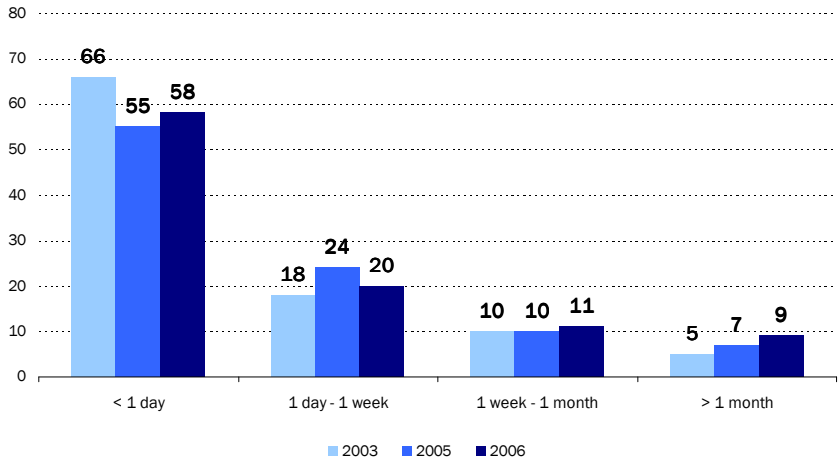
While recent interactions are increasingly likely to involve citizens filling out forms, they are also likely to involve a wide range of other activities.



**Q:**  
Did your most recent contact involve any of the following activities?  
(Base: Those with recent contact with the federal government; July 06, n=832)

**Most interactions are completed within a day:**

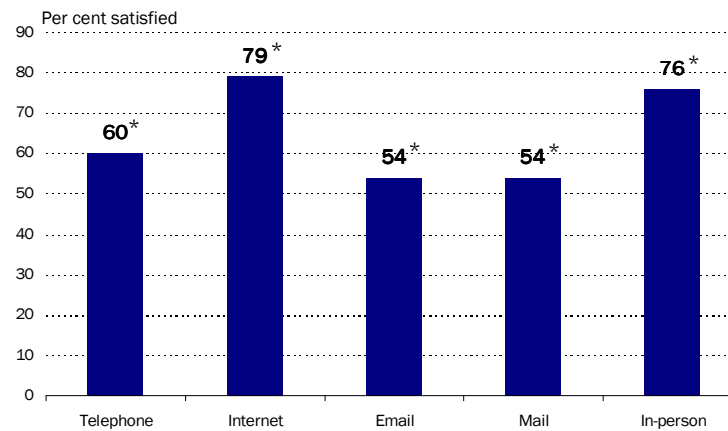
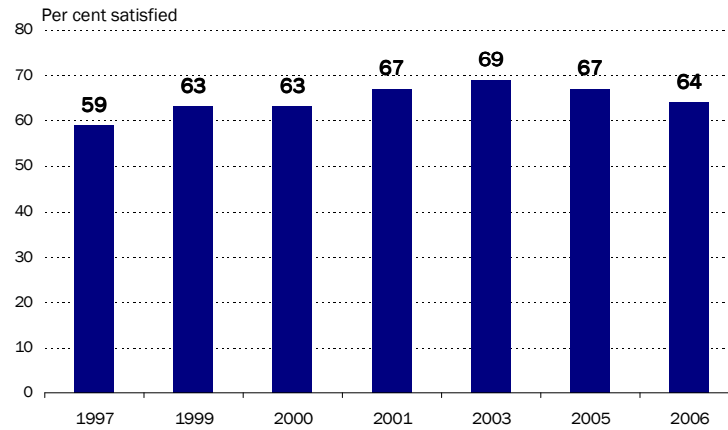
Although more than half of all Canadians conclude their government contact within the day, a considerable number of Canadians maintain contact for an extended period of time.



**Q:**  
How long did it take to complete this contact?  
(Base: Those with recent contact with federal government; July 06, n=832)

### Satisfaction levels remain largely unchanged, but differ across channels:

Almost 2 in 3 Canadians with recent contact report being satisfied, largely unchanged from previous years. Perhaps most striking is despite the telephones overall high usage, Canadians are more likely to be less satisfied with its results.

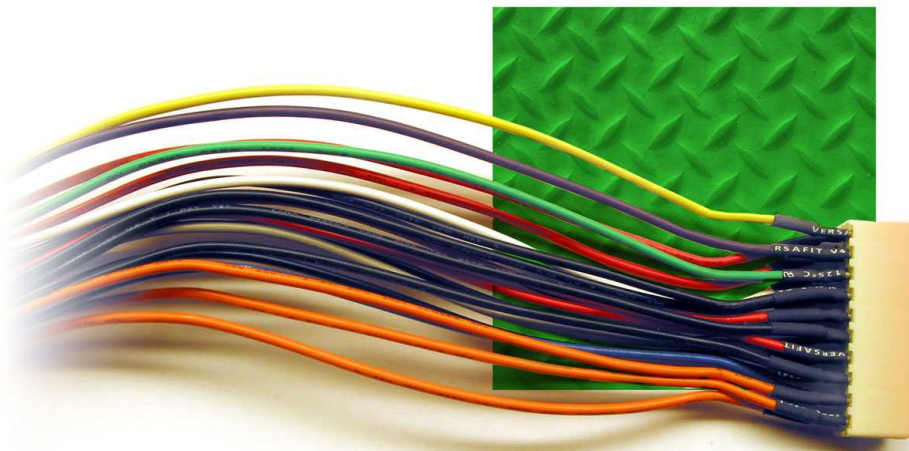


#### Q:

Could you please rate your overall satisfaction with the service or response you received from the federal government during your most recent contact.

(Base: Those with recent contact with the federal government; July 06, n=832 \* Differences are statistically significant from overall average)







## **Channel preferences**

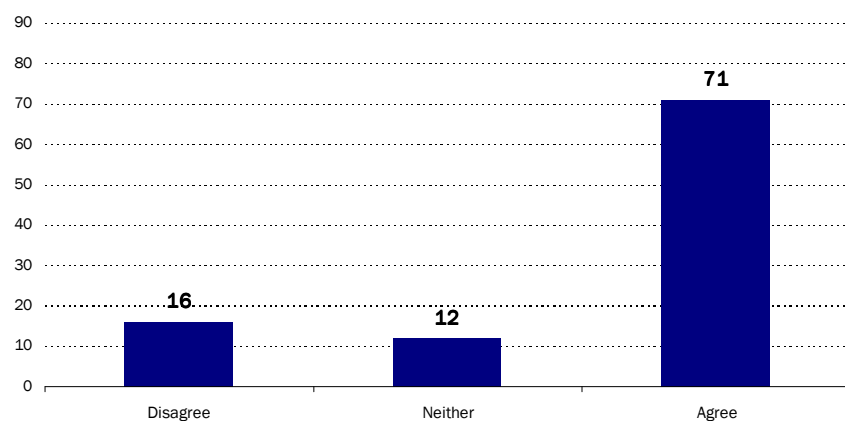


## Highlights

- The majority of Canadians believe the Internet will play a prominent role in future government interactions. These expectations have not increased and suggest that all channels will continue to remain important in the future.
- Despite greater experience online, the growing trend of Canadians increasingly pointing to e-channels as their preferred method has slowed. In fact, there are increasingly two groups generally equal in size — those that prefer the telephone and those that prefer e-channels. At the same time, Canadians' preferences also reflect the nature of the interaction. In some cases, for example, even some of the savviest Internet users point to a preference for non-e-channels for certain interactions. In other words, it is important to not think of preferences as being homogenous, both across types of Canadians and types of interactions.
- Some Canadians are more likely than others to prefer certain channels in interacting with the government. Common trends include: those under the age of 45 preferring the Internet while those older favouring the telephone, and an overall increase in net preferences along income levels.

### Canadians stress convenience:

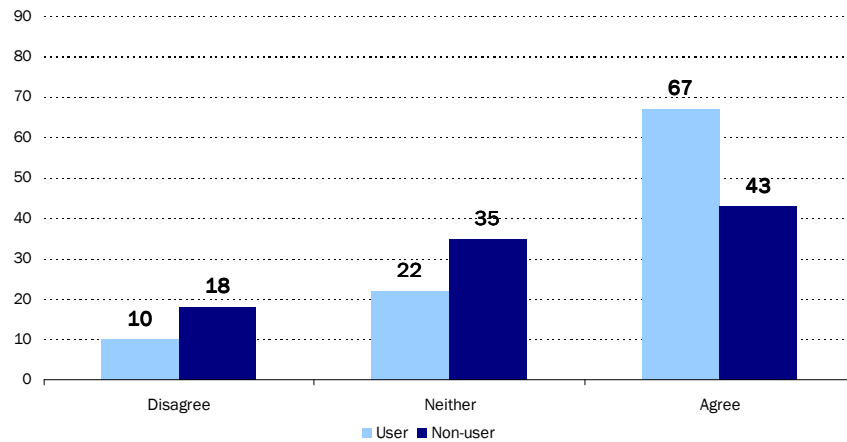
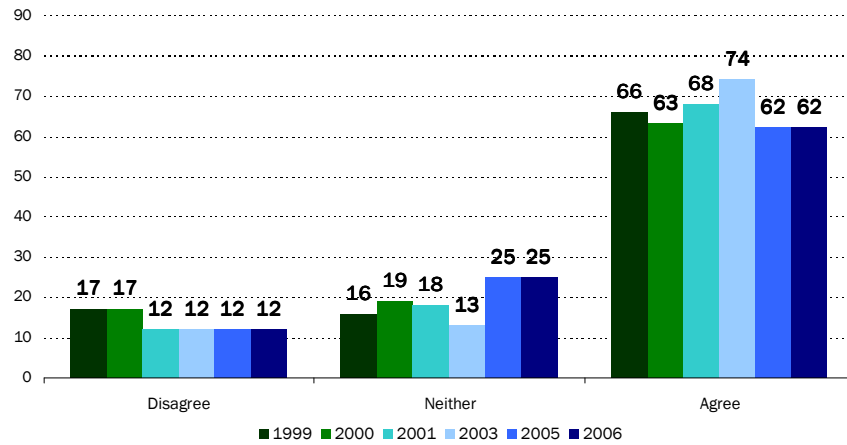
Canadians overwhelmingly agree that the application process for any government program should require contacting only one government agency.



**Q:**  
Canadians should be able to apply for any federal government program or service by contacting ONLY ONE federal government department or agency.  
(Base: All Canadians; July 06, n=1124)

### Canadians are generally confident in finding government information:

Although the majority of Canadians are confident in finding government related information, Internet users tend to express higher levels of confidence in finding information on government programs and services.

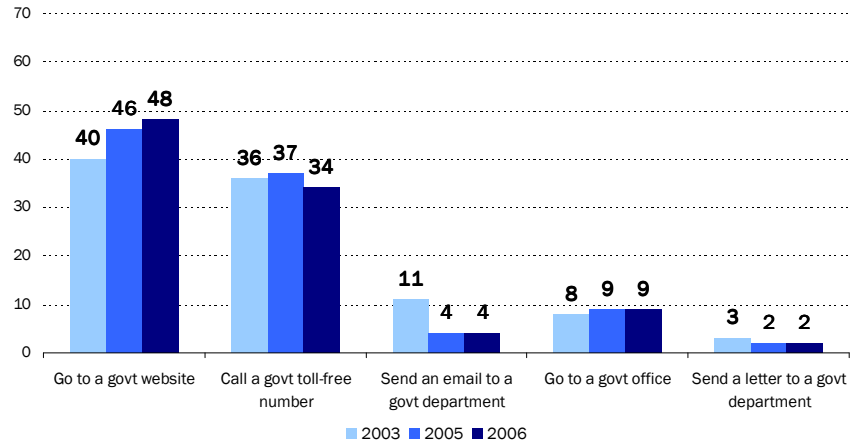


**Q:**  
I'm confident I could find information from the Government of Canada about programs or services  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

**Canadians** are far **more inclined to turn to the Internet for broad inquiries on government information**. When requiring a specific answer to a question, however, Canadians say they would opt to use the telephone almost as frequently as the Internet.

### Canadians increasingly expect to turn to government websites:

Although Canadians increasingly report they would most likely use a government website than any other channel if they had to find information on a program or service, the telephone remains a key starting point for many others.

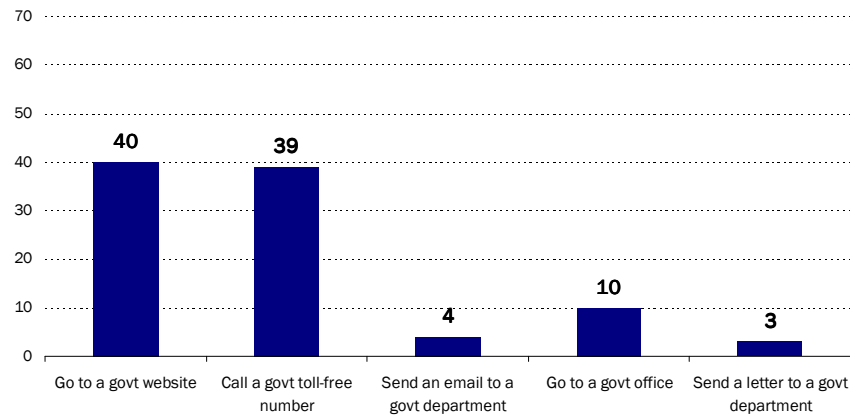


**Q:**

If you needed to find information about a government program or service, how would you go about it? Would you be most likely to ...  
(Base: All Canadians; July 06, n=1087)

### In contrast, toll-free numbers still essential for specific information:

While Canadians are most likely to turn to websites when looking for information in general, they are as likely to call a toll-free number for answers regarding specific questions.



**Q:**

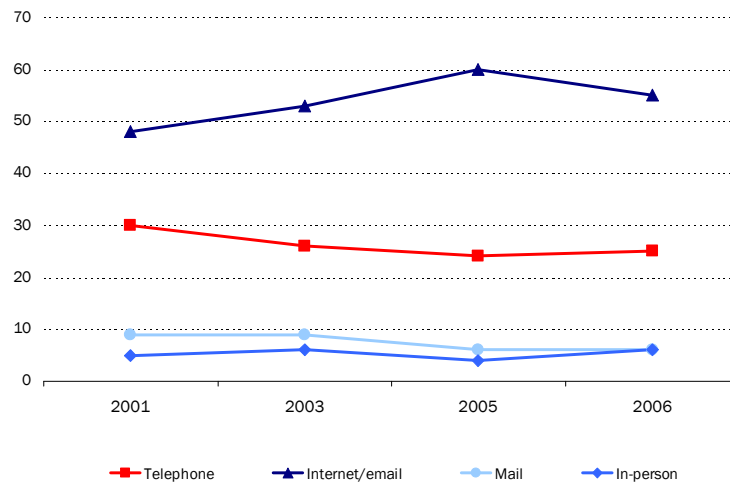
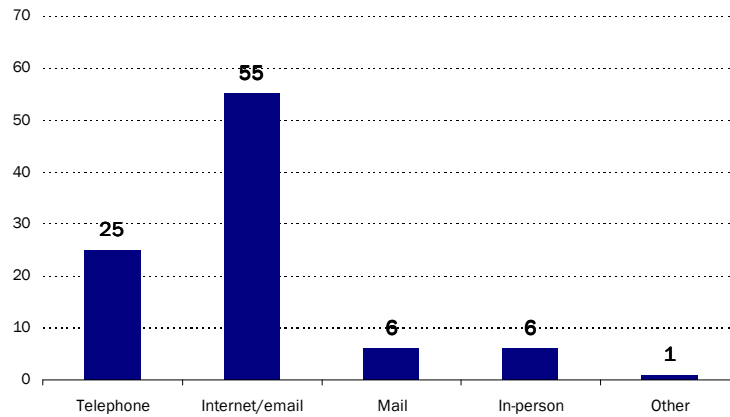
If you needed to get an answer to a specific question about a government program or service, how would you go about it? Would you be most likely to ...  
(Base: All Canadians; July 06, n=1137)

**As** in previous years, the majority of Canadians believe the Internet will play a prominent role in their future government interactions. Despite this strong outlook, **these expectations have not increased** recently (and are down slightly from last year) suggesting that all channels will continue to remain important in the future.



### E-channels continue to dominate future expectations:

While Canadians continue to expect using all current channels with governments in the future, the majority still point to e-channels – although this is slightly less pronounced than last year.

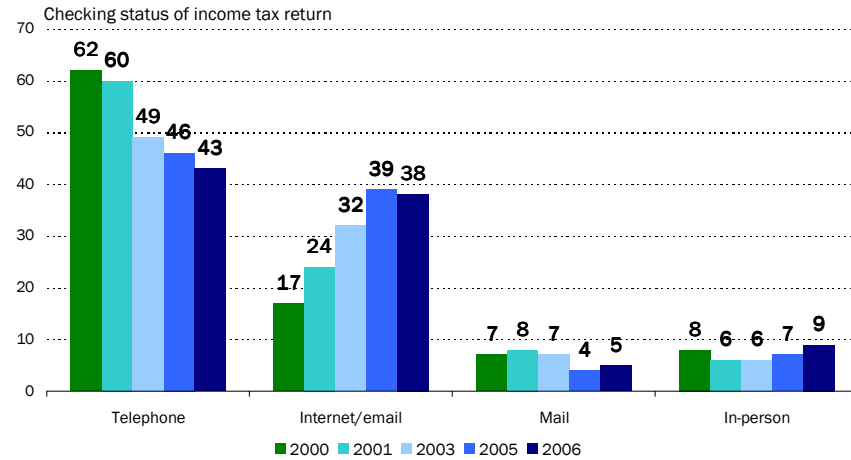


**Q:** Thinking about five years from now, what do you think will be your main method of contact with governments?  
(Base: All Canadians; July 06, n=1207)

**Despite** greater experience online, the growing trend of Canadians increasingly pointing to e-channels as their preferred method has dramatically slowed. In fact, **there are increasingly two groups of Canadians generally equal in size** — those that prefer the telephone and those that prefer e-channels.

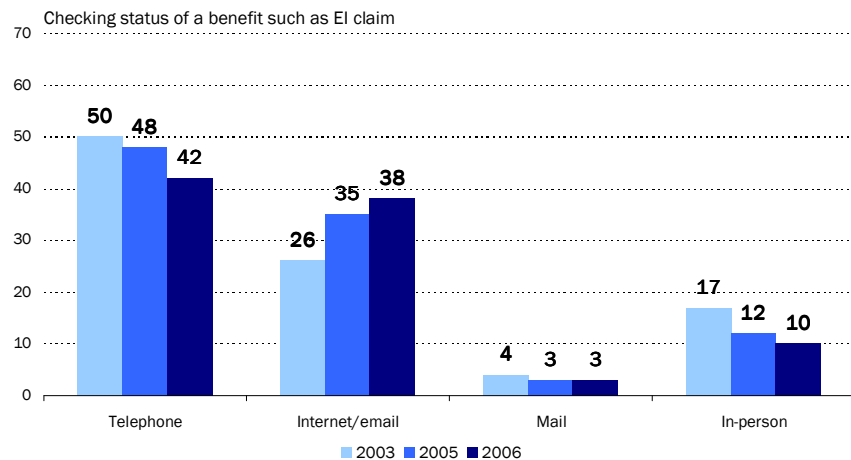
### Internet rivaling the phone for checking status:

The telephone remains the preferred method of contact for checking the status of a tax return or a benefit, although the Internet is now preferred almost as often.



**Q:**

If you were to contact the federal government to... what would be your preferred method of contact?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

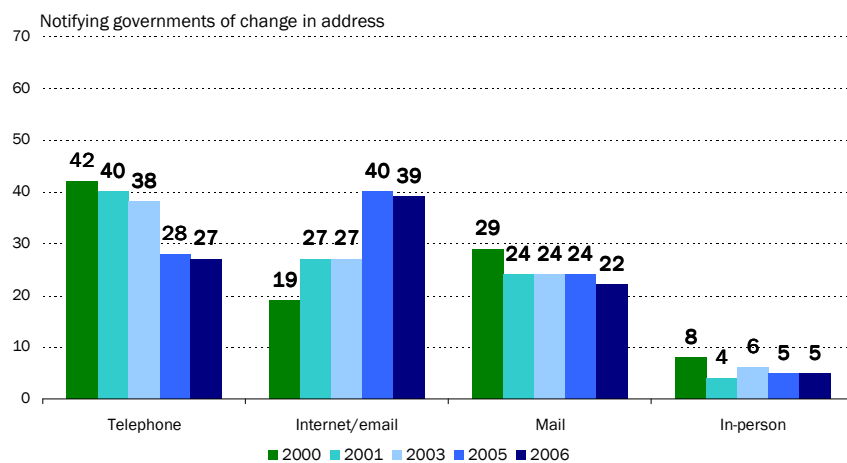


**Q:**

If you were to contact the federal government to... what would be your preferred method of contact?  
(BASE: All Canadians; Aug./Sept. 06, n=1580)

### Significance of the Internet in notifying/updating a change of address:

When it comes to notifying the government of a change in address, the Internet has long supplanted other channels as the preferred method of contact.

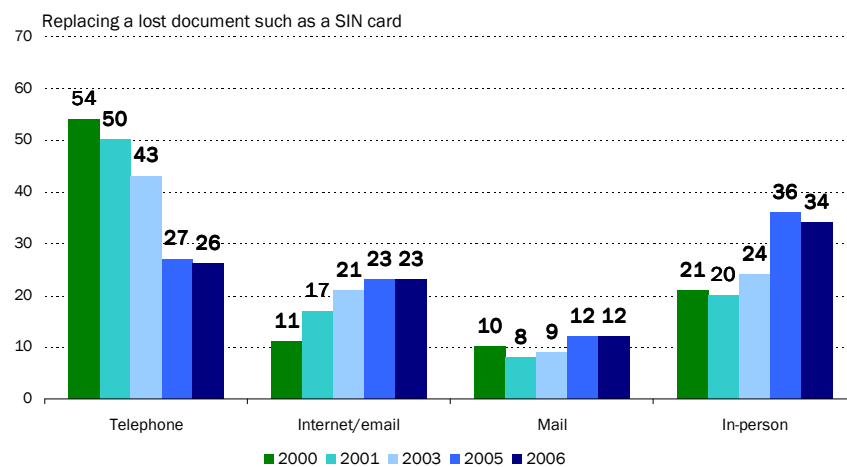


**Q:**

If you were to contact the federal government to... what would be your preferred method of contact?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

### Personal interaction still a preferred method for some interactions:

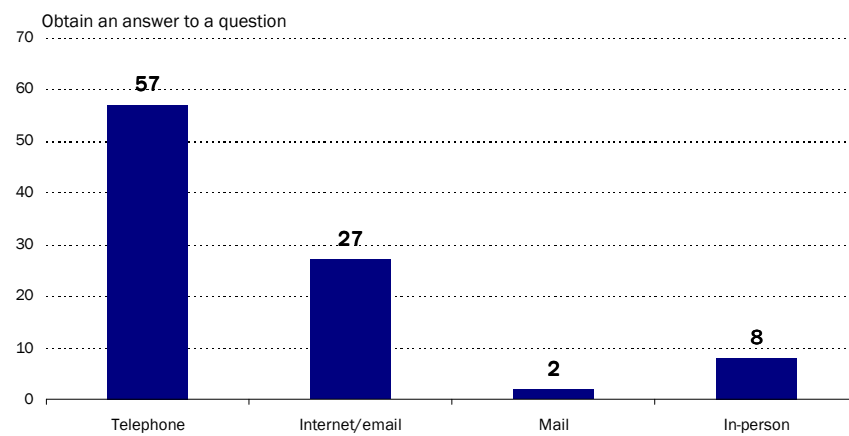
Despite recent improvements to security and safety, Canadians still prefer replacing a lost document, such as a SIN card, in-person.



**Q:**  
If you were to contact the federal government to... what would be your preferred method of contact?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

**The phone continues to be the preferred method to obtaining answers:**

Canadians overwhelmingly prefer contacting the government by phone in seeking answers to specific questions.

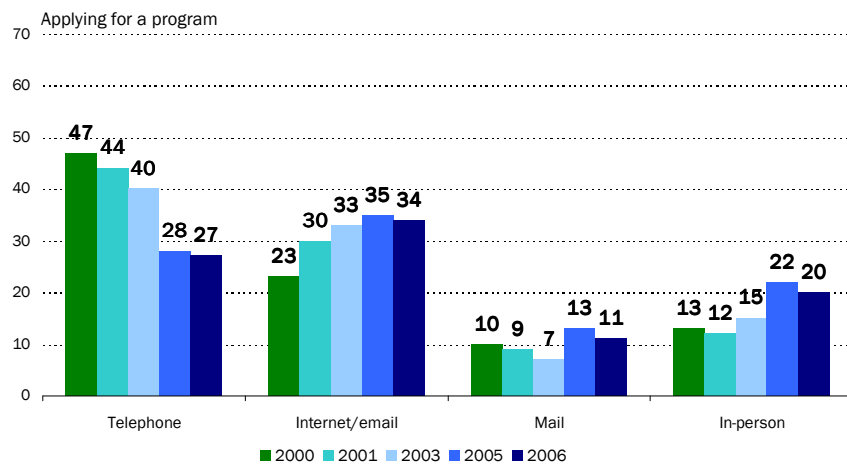


**Q:**

If you were to contact the federal government to... what would be your preferred method of contact?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

### Phone and Internet channels dominate the application process landscape:

With ongoing improvements made to online application processes, the Internet continues to be the preferred method of Canadians for applying to a government program.

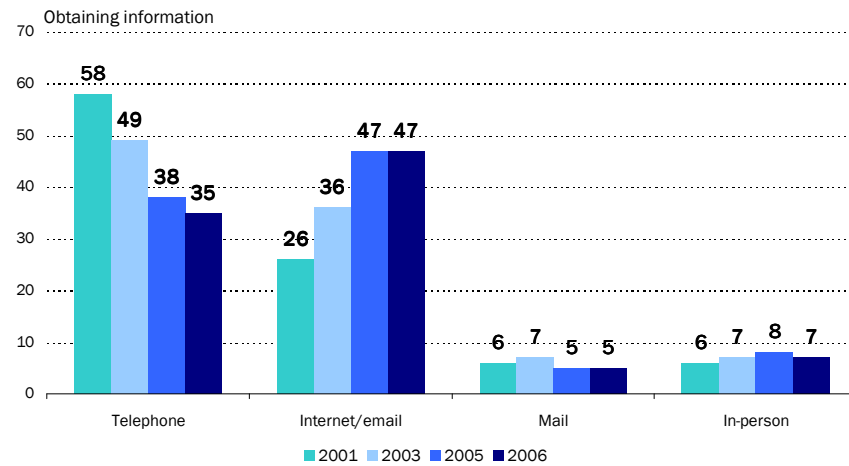


#### Q:

If you were to contact the federal government to... what would be your preferred method of contact?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

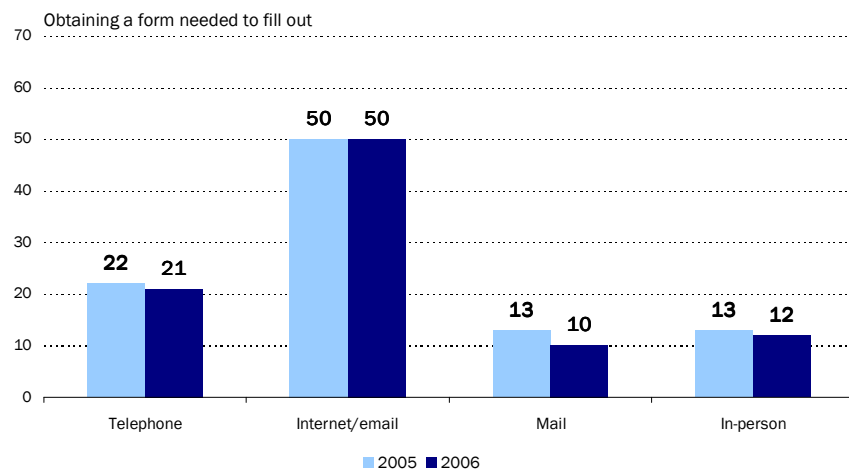
### The Internet establishing new preferences:

Major strides in online communication, immediacy and convenience in particular, have made the Internet the preferred method of contact in obtaining information and forms, replacing both the phone and mail channels.



**Q:**

If you were to contact the federal government to... what would be your preferred method of contact?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)



**Q:**

If you were to contact the federal government to... what would be your preferred method of contact?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)



**Consistent** with previous years, **some Canadians are more likely than others to prefer certain channels** in interacting with the federal government. Common trends include; those under the age of 45 preferring the Internet while those older favouring the telephone, and an overall increase in net preferences along income levels and users and non-users.

## Preferences

(Per cent)

	Obtaining an answer to a question				Applying for a program			
	Phone	Internet Email	Mail	In-person	Phone	Internet Email	Mail	In-person
<b>All Canadians</b>	57	27	2	8	27	34	11	20
<b>Gender</b>								
Males	55	30	2	8	24	38	10	20
Females	60	24	2	8	30	31	12	19
<b>Age</b>								
25 and under	46	43	1	7	18	48	6	20
25-44	55	32	1	7	24	43	9	19
45-64	60	24	2	8	28	30	12	23
65 and over	67	9	5	10	40	11	21	15
<b>Household Income</b>								
<\$20k	62	20	1	9	31	21	12	24
\$20-\$39k	64	17	5	7	34	19	14	24
\$40-\$59k	60	26	1	9	28	33	11	22
\$60-\$79k	55	32	1	6	22	46	10	15
\$80-\$99k	55	38	0	7	28	45	9	16
\$100k +	46	41	1	6	17	57	10	12
<b>Internet Usage</b>								
Non-user	72	3	4	12	44	2	16	25
User	53	34	1	6	22	43	10	18
<b>Location</b>								
Urban	55	29	1	8	24	38	11	20
Rural	65	20	4	7	36	22	12	21

### Q:

If you were to contact the federal government to ... what would be your preferred method of contact?

(BASE: All Canadians; Aug./Sept. 06, n=1586)

## Preferences

(Per cent)

	Status of income tax return				Status of a benefit*			
	Phone	Internet Email	Mail	In-person	Phone	Internet Email	Mail	In-person
<b>All Canadians</b>	43	38	5	9	42	38	3	10
<b>Gender</b>								
Males	39	42	5	9	39	41	3	11
Females	46	35	5	9	45	35	2	9
<b>Age</b>								
25 and under	32	47	3	12	31	54	0	7
25-44	38	49	4	7	38	48	1	7
45-64	46	35	4	9	46	33	3	12
65 and over	56	12	11	12	54	8	10	17
<b>Household Income</b>								
<\$20k	42	22	7	19	42	26	2	17
\$20-\$39k	51	26	7	10	51	23	5	10
\$40-\$59k	47	35	5	9	44	40	2	10
\$60-\$79k	35	53	4	4	37	50	3	5
\$80-\$99k	35	54	2	7	39	49	1	7
\$100k +	31	61	3	4	29	60	1	9
<b>Internet Usage</b>								
Non-user	64	3	8	18	61	3	5	17
User	36	49	4	6	36	49	2	8
<b>Location</b>								
Urban	40	41	5	9	38	42	3	10
Rural	51	31	6	10	55	25	3	10

### Q:

If you were to contact the federal government to ... what would be your preferred method of contact?

(BASE: All Canadians; Aug./Sept. 06, n=1580\*)

## Preferences

(Per cent)

	Change in address				Replacing a lost document			
	Phone	Internet Email	Mail	In-person	Phone	Internet Email	Mail	In-person
<b>All Canadians</b>	27	39	22	5	26	23	12	34
<b>Gender</b>								
Males	23	43	23	5	24	23	12	37
Females	32	36	22	5	28	22	13	31
<b>Age</b>								
25 and under	29	44	12	9	15	20	18	44
25-44	29	50	13	4	25	30	8	33
45-64	25	36	27	4	27	21	13	33
65 and over	28	13	44	6	38	6	17	29
<b>Household Income</b>								
<\$20k	35	26	19	11	31	12	9	38
\$20-\$39k	30	28	31	3	30	12	19	34
\$40-\$59k	31	36	22	5	24	21	11	40
\$60-\$79k	23	53	16	3	23	30	12	30
\$80-\$99k	24	50	19	4	23	33	13	30
\$100k +	18	61	13	4	21	38	6	32
<b>Internet Usage</b>								
Non-user	44	2	36	9	39	4	15	33
User	23	50	18	4	23	28	11	34
<b>Location</b>								
Urban	26	43	20	6	25	24	10	35
Rural	34	25	30	3	31	16	18	28

### Q:

If you were to contact the federal government to ... what would be your preferred method of contact?

(BASE: All Canadians; Aug./Sept. 06, n=1586)

## Preferences

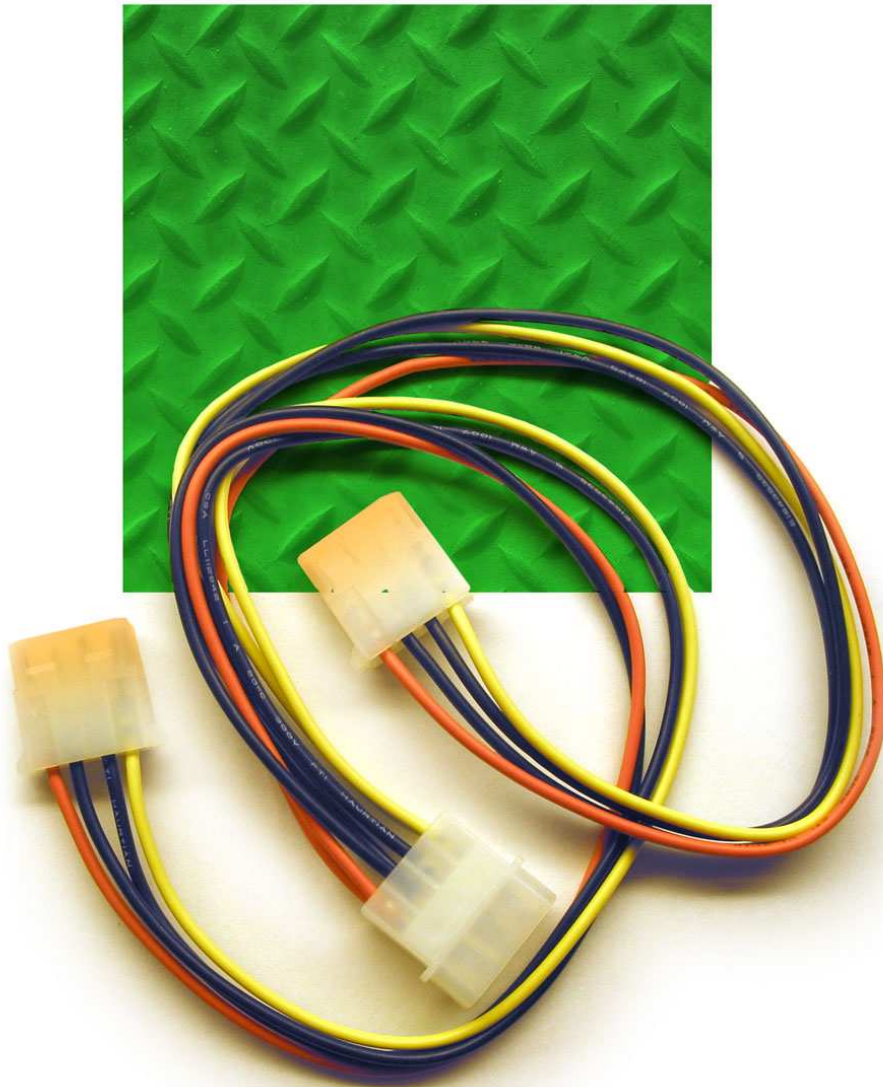
(Per cent)

	Obtaining information				Obtaining a form to fill out			
	Phone	Internet Email	Mail	In-person	Phone	Internet Email	Mail	In-person
<b>All Canadians</b>	35	47	5	7	21	50	10	12
<b>Gender</b>								
Males	31	50	5	7	18	54	10	13
Females	38	43	5	7	24	45	11	12
<b>Age</b>								
25 and under	15	69	2	7	11	55	12	11
25-44	31	56	2	6	14	62	7	12
45-64	41	40	4	7	24	47	10	13
65 and over	48	17	15	10	42	17	18	13
<b>Household Income</b>								
<\$20k	45	26	7	12	27	25	16	18
\$20-\$39k	43	33	8	9	28	33	15	18
\$40-\$59k	37	45	4	7	21	48	11	14
\$60-\$79k	28	60	2	5	16	64	6	9
\$80-\$99k	25	62	5	3	15	68	7	7
\$100k +	23	68	1	4	11	76	4	7
<b>Internet Usage</b>								
Non-user	63	3	10	14	47	2	18	22
User	27	60	3	5	13	63	8	10
<b>Location</b>								
Urban	33	49	4	7	18	53	9	13
Rural	40	40	6	6	33	37	14	9

### Q:

If you were to contact the federal government to ... what would be your preferred method of contact?

(BASE: All Canadians; Aug./Sept. 06, n=1586)



## Online channels

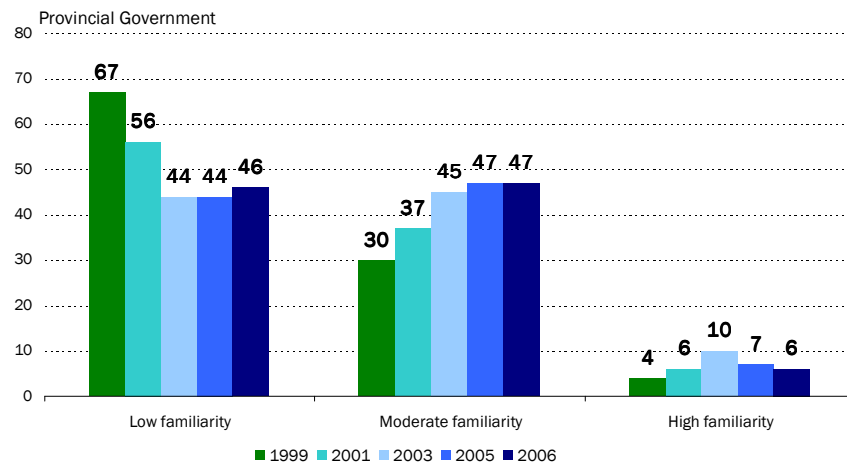
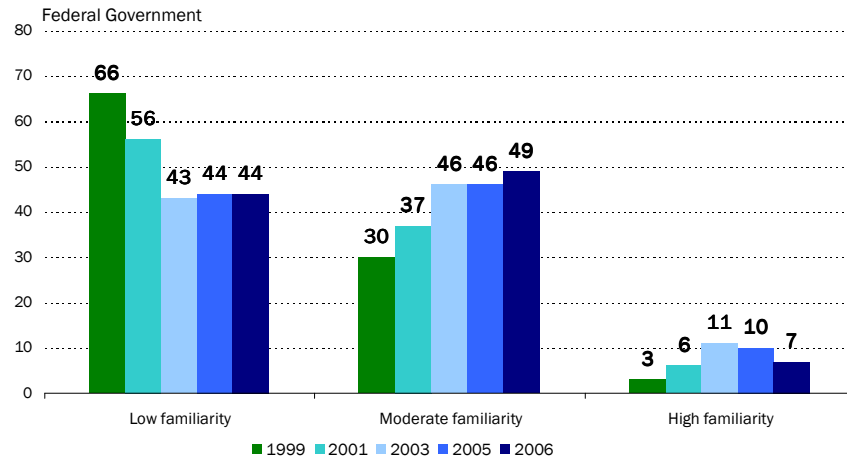




## Highlights

- With a significant increase in users agreeing that the Internet has made it easier to find government information, almost half of all Canadians would do most of their government interactions online if they could. That said, Canadians remain extremely unfamiliar with what services the various governments provide online.
- More Canadians are being exposed to government online, either through their own interactions or those of an intermediary. In fact, only a small minority have not done one of a series of common online government interactions.
- As more Canadians, by themselves or through other parties, use online government resources, various activities have shown an increase in usage.
- Given the choice, nearly 1 in 2 Canadians would prefer to use the Internet in most of their government interactions; however, the perceived benefits of online transactions are mixed. A strong majority of Canadians continue to worry about doing some online transactions, led by financial transactions and providing personal information.

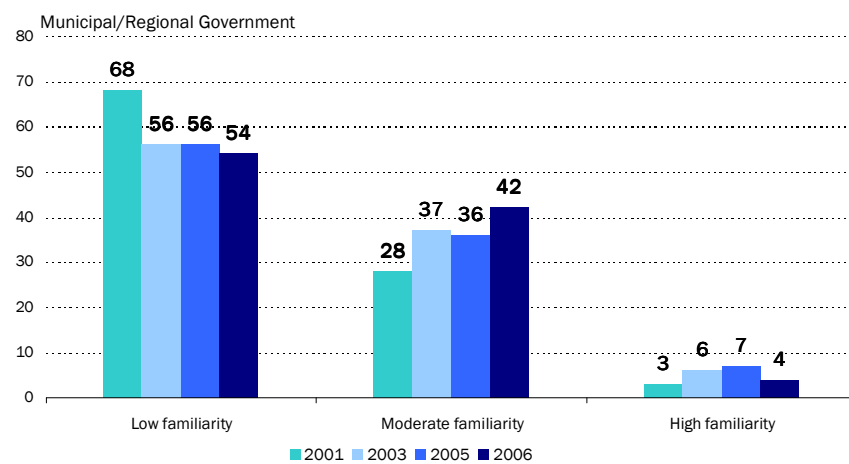
## Familiarity with online services remain low:



**Q:**  
How familiar are you with the services provided by ... over the Internet ?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

### Familiarity with online services remain low:

Despite a proliferation in visits to government websites over the past several years, Canadians continue to lack familiarity with government services provided online. In fact, there has been virtually no improvement since 2001 and fewer than 1 in 10 Canadians report high familiarity.

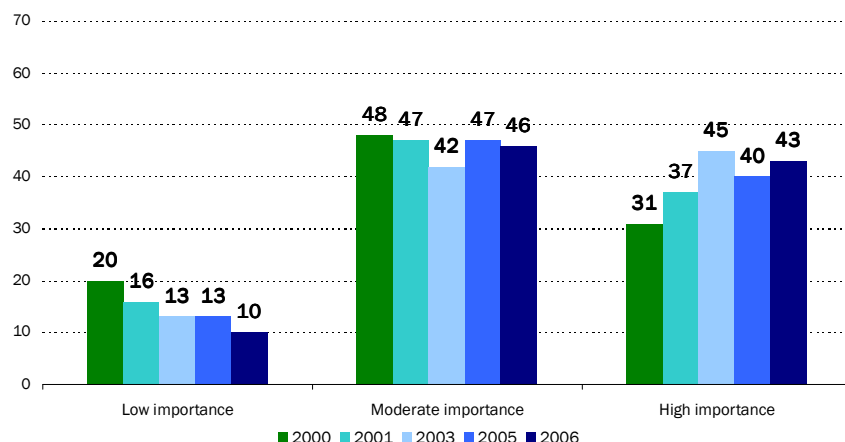


**Q:** How familiar are you with the services provided by . . . over the Internet?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

**Canadians** overwhelmingly agree that the Internet is an effective way for the government to contact Canadians. With a significant increase in users agreeing that the Internet has made it easier to find information, **almost half of all Canadians would do most of their government interactions online** if they could. That said, Canadians remain extremely unfamiliar with what services the various governments provide online.

### The Internet remains firmly entrenched in finding government information:

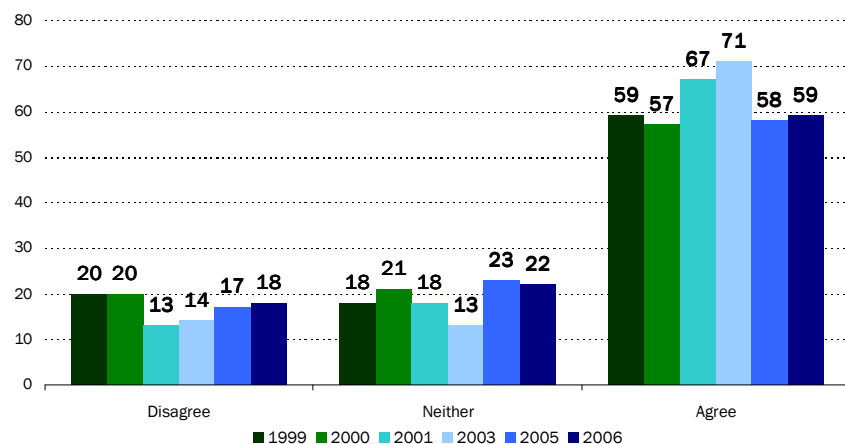
Internet users continue to point to the overall importance of the Internet in finding information regarding government programs and services. Only 1 in 10 users report that the Internet is of little or no importance.



**Q:**  
How important is the Internet as a way for you to find out information about government programs and services?  
(BASE: Internet Users; Aug./Sept. 06, n=1281)

### The Internet is an effective intermediary:

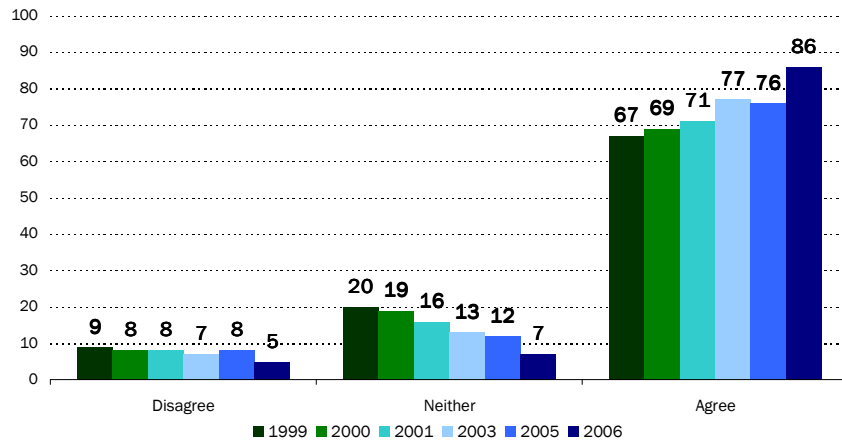
Canadians hold an overall positive view on the effectiveness of the Internet as a way for governments to communicate with Canadians.



**Q:**  
The Internet is an effective way for governments to communicate with Canadians about programs and services they offer  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

### Internet increasingly perceived as facilitating information search:

More than 4 in 5 users report the Internet has made finding government information easier, an overall increase from previous years.

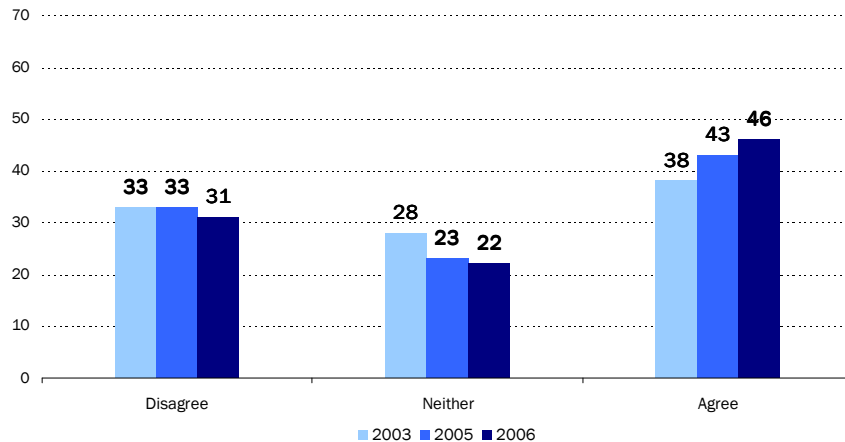


**Q:**

The Internet has made it easier to find information about government programs and services.  
(Base: Internet users; July 06, n=883)

### Canadians increasingly interested in online interactions:

Gradually, Canadians are embracing the possibility of using the Internet as a primary method of government interaction. Almost 1 in 2 Canadians would do most of their interactions online if they could, and is up again this year.

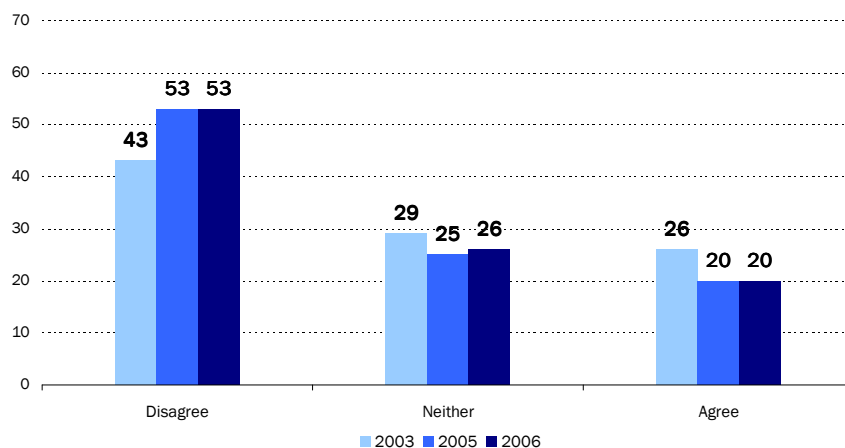


**Q:**

I would do most of my interactions with governments online if I could.  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

### Perceived benefits of online transactions are mixed:

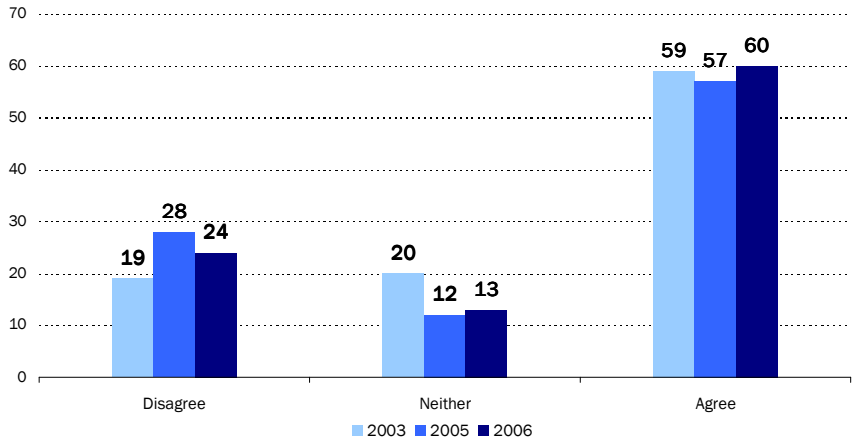
While the majority of Canadians reject the notion that there are not many benefits to online interactions, it is noteworthy that 1 in 5 Canadians still hold this view.



**Q:**

I don't see any real benefit to interacting with governments online  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

**Majority of Canadians continue to worry about online interactions:**  
Despite greater online experience and an overall interest in increasing online government interactions, the same proportion of Canadians, 3 in 5, continue to express discomfort with some types of online government interactions.



**Q:**  
There are some types of interactions with government that I would never do online.  
(Base: All Canadians; July 06, n=1137)



### Types of interactions would not do online

(Per cent)

	2005	2006
Conducting financial transactions	23	21
Providing personal information other than Social Insurance Number	27	20
File income taxes online	23	13
Providing Social Insurance Number	20	11
Providing health information	12	11
Passport	11	7
Voting	7	–
Other	16	16
Would not do any types of interaction online	13	9
DK/NR	18	31

**Q:**

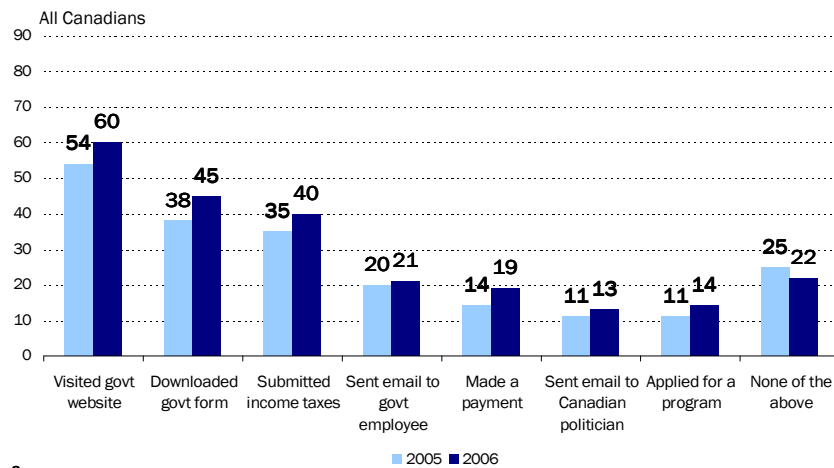
What types of interactions with governments would you never do online?

(BASE: Canadians who would never do some types of interactions with governments online, July 06, n=828)

**More** Canadians are being exposed to government online, either through their own interactions or those of an intermediary. In fact, **only a small minority — fewer than 1 in 4 have not done one of a series of common online government interactions**. While demographic differences exist, it is worth noting that the majority of most age groups have had this exposure. Even among seniors, almost 1 in 2 have had this exposure.

### Canadians are conducting online activities in large numbers:

The extent to which Canadians are increasingly making use of the governments online services to do a variety of activities is impressive. Fewer than 1 in 4 Canadians have not done any of a common set of activities online with governments, either directly by themselves or indirectly through someone else.



Q:

Have you ever done any of the following activities with governments over the Internet?/Has anybody ever done any of the following activities with governments over the Internet on your behalf?

(Base: All Canadians; July 06, n=4518)

## Interactions

(Per cent)

	Visited a government Website	Downloaded a government form	Submitted Income taxes	Sent email to a government employee
<b>All Canadians</b>	60	45	40	21
<b>Gender</b>				
Males	62	46	41	22
Females	58	45	39	20
<b>Age</b>				
25 and under	70	38	28	15
25-44	71	57	46	26
45-64	59	47	41	24
65 and over	24	21	36	9
<b>Household Income</b>				
<\$20k	44	30	34	12
\$20-\$39k	50	37	36	15
\$40-\$59k	60	46	39	17
\$60-\$79k	70	55	47	26
\$80-\$99k	76	61	49	31
\$100k +	80	68	52	36
<b>Internet Usage</b>				
Non-user	10	11	36	3
User	74	55	41	26
<b>Location</b>				
Urban	62	48	41	22
Rural	51	38	39	17

### Q:

Have you done any of the following activities with governments over the Internet?  
(BASE: All Canadians; July 06, n=4518)

## Interactions

(Per cent)

	Made a payment	Sent email to a Canadian politician	Applied for a program	None of the above
<b>All Canadians</b>	19	13	14	22
<b>Gender</b>				
Males	23	13	14	20
Females	16	12	13	24
<b>Age</b>				
25 and under	22	9	17	18
25-44	23	14	18	14
45-64	19	16	11	22
65 and over	8	9	4	56
<b>Household Income</b>				
<\$20k	16	7	13	35
\$20-\$39k	13	10	12	29
\$40-\$59k	18	12	14	19
\$60-\$79k	23	16	15	12
\$80-\$99k	29	18	19	9
\$100k +	29	22	18	9
<b>Internet Usage</b>				
Non-user	4	2	4	52
User	24	16	16	13
<b>Location</b>				
Urban	20	13	14	21
Rural	15	12	12	25

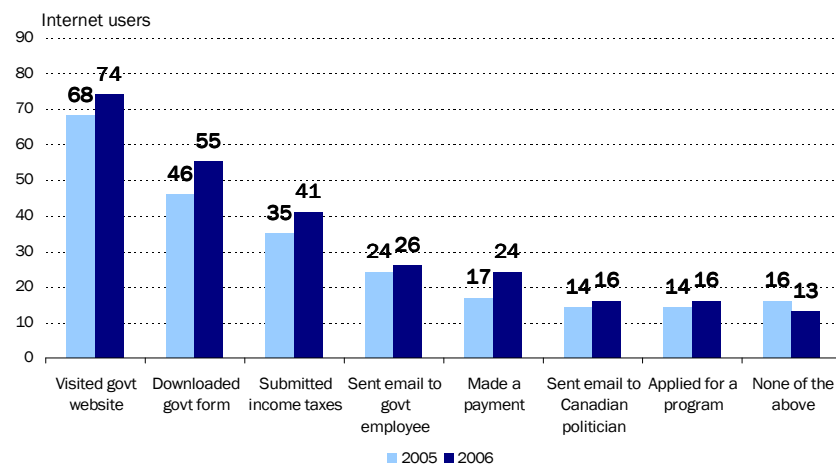
### Q:

Have you done any of the following activities with governments over the Internet?

(BASE: All Canadians; July 06, n=4518)

### Incidence of online activities up in many areas:

The overwhelming majority of users have done some type of interaction with government online. In fact, only a slim minority of users have not done any common type of government interaction.

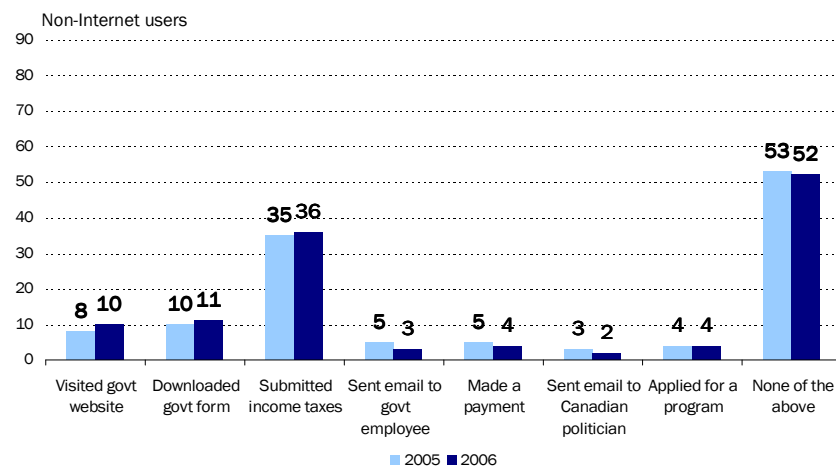


**Q:**

Have you ever done any of the following activities with governments over the Internet?  
(Base: Internet users; July 06, n=3382)

### Sizeable minority of non-users rely on intermediaries:

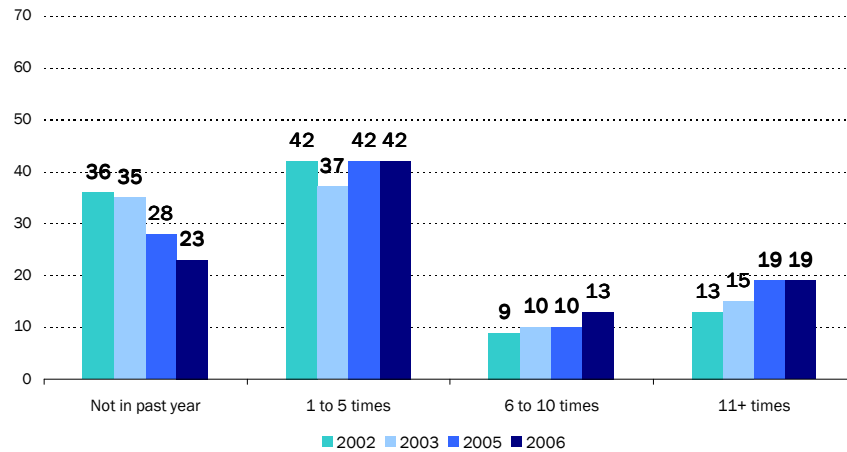
While a slim majority of non-users have not done various online transactions through an intermediary, many who are not online are still taking advantage of newer resources.



**Q:** Has anybody ever done any of the following activities with governments over the Internet on your behalf?  
(Base: Non-Internet users; July 06, n=1137)

### Nearly 3 in 4 users have visited Government websites in the past year:

A significant amount of Internet users have visited a federal website in the past year. In fact, the number of those who have not continues to decrease.

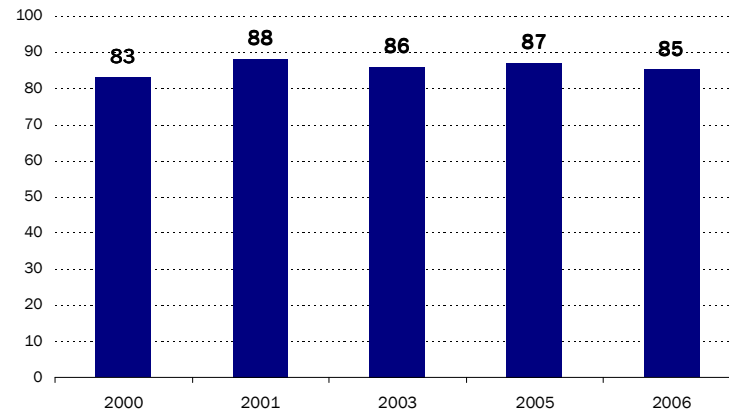


**Q:**

How many times have you visited Government of Canada websites over the past twelve months?  
(Base: Internet users; July 06, n=1691)

### Overwhelming majority are successful in finding information:

More than 8 in 10 users that have visited a federal website in the past year report success in finding the information they were looking for.



**Q:**

Did you find the information that you were looking for?  
(BASE: Those who visited federal government websites in the past 12 months; July 06, n=1243)



## Government of Canada websites visited

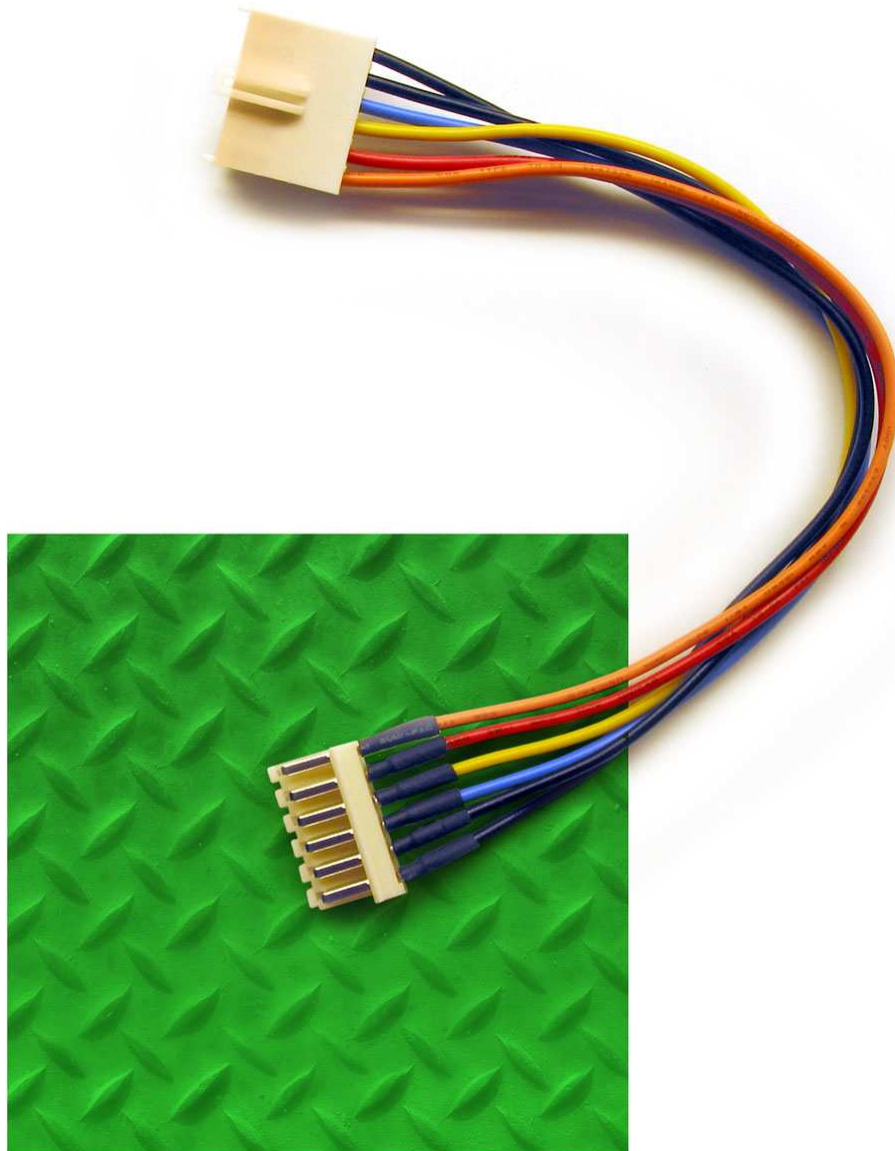
(Per cent)

	2003	2005	2006
Canada Revenue Agency/Income tax information	25	25	33
Health Canada	8	6	15
Human Resources and Social Development Canada	17	15	13
Main Government of Canada website	16	12	13
Citizenship and Immigration Canada	5	10	7
Federal job opportunities	6	4	6
Environment Canada	5	8	5
Passport office	3	4	5
Statistics Canada	3	4	4
Canada Pension Plan	2	3	3
Department of National Defense	3	3	2
Agriculture	1	3	1
Canada Post	1	3	1
Department of Justice	1	3	1
Other	3	17	24
DK/NR	15	9	9

### Q:

Which Government of Canada websites have you visited in the past twelve months?

(BASE: Internet users who have visited a Government of Canada website in the past twelve months; July 06, n=1,244)



## Fostering uptake of online channels



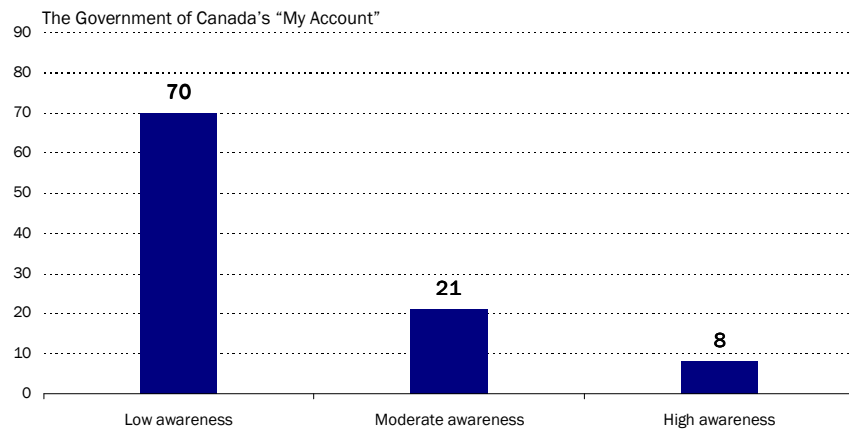
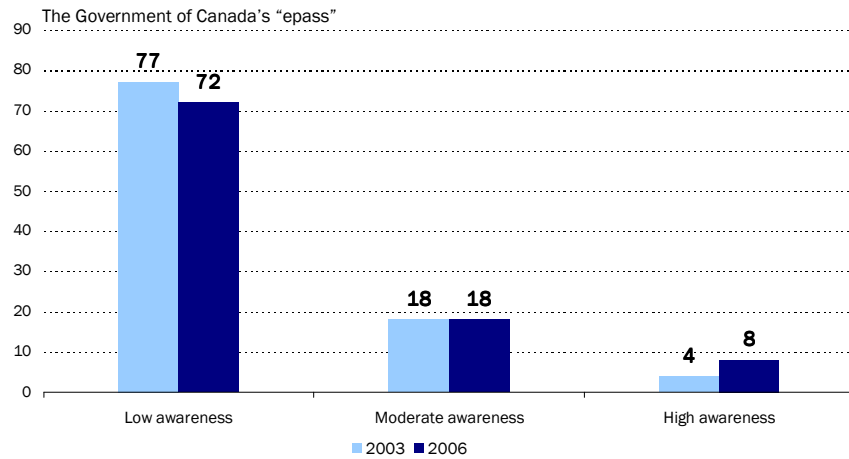
### **Highlights**

- An overwhelming majority of Canadians have little to no knowledge of the Government of Canada's 'epass' and 'My Account'. Equally concerning, more than half of Canadians say they do not deal with the federal government frequently enough to make it worthwhile to obtain an online account.
- Canadians overall tend to agree that a variety of changes could encourage greater adoption of the online channel. The positive results of a variety of different ideas reinforces that governments should consider making significant changes to the online environment.

**An** overwhelming majority of Canadians have **little to no knowledge of the Government of Canada's 'epass' and 'My Account'**. At the same time, 1 in 2 Canadians say that they do not deal with the federal government frequently enough to make it worthwhile to obtain a username or password in order to do online interactions.

### Extremely low awareness of E-pass and My Account:

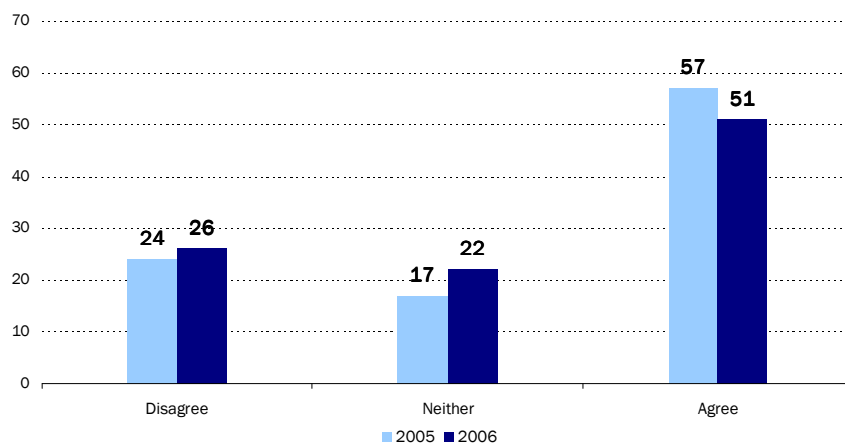
The overwhelming majority of Canadians continue to be unaware of online government services, most notably the 'E-pass' and 'My Account' programs.



**Q:**  
To what extent are you aware of ... ?  
(BASE: All Canadians; Aug./Sept. 06, n=1586)

### Infrequency of contact affects value proposition:

The value proposition of online transactions is weakened by the infrequency of government contact. Despite increased interactions, the majority still point to this as an obstacle of obtaining an online account.

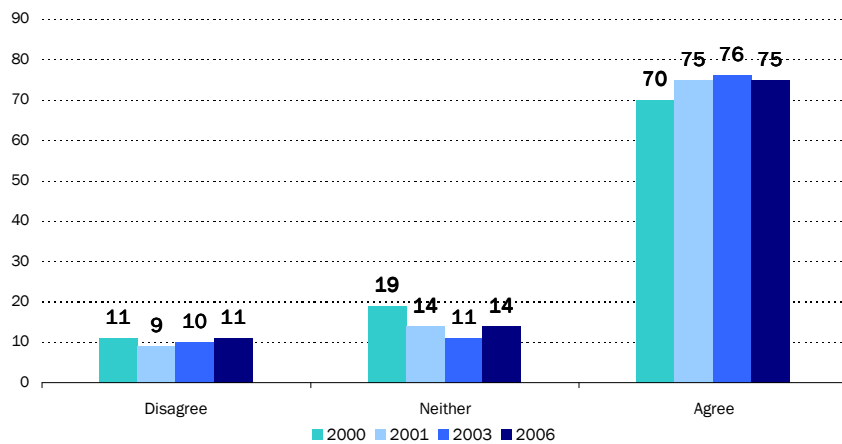


**Q:**  
I do not deal with the federal government frequently enough to make it worth the trouble of obtaining a username and password that would allow me to conduct transactions online.  
(BASE: All Canadians; Aug./Sept. 06, n=1586)



### Online application process requires convenience:

The overwhelming majority of users continue to believe applying for programs and services from different government departments should require visiting only one federal website.



**Q:** Canadians should be able to apply for programs and services from different federal government departments by having to visit only one Government of Canada web site.  
(Base: Internet users; July 06, n=843)

**Canadians** overall tend to **agree that a variety of changes could encourage greater adoption of the online channel**. The positive results of a variety of different ideas reinforces that governments should consider making various changes to the online environment.

## Encouraging use of online services

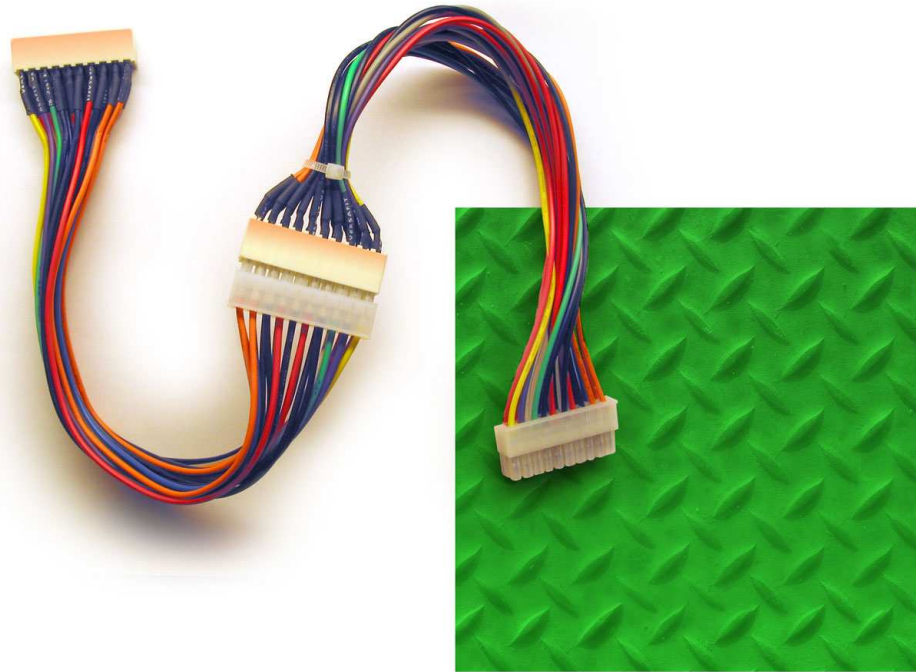
(Per cent)

	No impact 1	(2-3)	Somewhat more likely 4	(5-6)	More likely 7	Average on a 7 point scale
Having shorter wait times if you need to follow-up and complete a transaction in person	2	2	8	44	41	5.96
Offering a discount or incentive	3	4	10	39	41	5.79
Guaranteeing a faster processing time	2	4	12	47	33	5.69
Notifying you ahead of time of important dates	4	4	13	42	34	5.57
Providing a better understanding of how your personal information is used and what can and cannot be done with it	3	5	13	44	32	5.55
Making it possible to view all of your personal information in a single secure website	4	5	13	44	31	5.49
Making more programs/services available online	2	6	17	51	22	5.35
Making citizens more aware of what types of government interactions they can do online	3	5	22	45	23	5.22
Making it possible to update your information in a single transaction rather than dealing with multiple departments separately	5	6	14	43	28	5.20

### Q:

What likelihood would . . . have on the likelihood to use government online?

(BASE: All Canadians that expect to do net interactions with the government; July 06, n=1100)



## Appendix A: Key Internet Trends

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## Recent Internet usage

% of Canadians using Internet in past 3 months

	1997	1999	2000	2001	2002	2003	2005	2006
<b>All Canadians</b>	37	51	60	68	68	74	78	78
<b>Gender</b>								
Males	44	56	64	73	73	76	79	80
Females	31	45	57	65	63	72	76	76
<b>Age</b>								
25 and under	61	72	85	90	89	93	94	94
25 — 44	44	57	70	81	79	86	89	88
45 — 64	32	47	54	61	63	70	77	77
65 and over	7	17	21	28	25	35	36	39
<b>Household Income</b>								
<\$20k	28	28	40	46	45	52	57	58
\$20 — \$39k	29	39	50	57	56	63	69	67
\$40 — \$59k	35	53	62	72	70	77	80	80
\$60 — \$79k	51	65	75	81	85	88	91	88
\$80 — \$99k	58	74	79	90	84	91	93	92
\$100k +	66	79	84	91	89	94	93	95
<b>Region</b>								
British Columbia	39	56	67	75	76	78	83	83
Alberta	37	56	63	73	66	77	81	83
Prairies	31	50	55	68	63	72	75	70
Ontario	37	56	65	73	70	78	81	81
Quebec	41	40	51	59	63	67	72	71
Atlantic Canada	34	46	54	62	67	70	70	73
<b>Location</b>								
Urban	--	54	63	72	72	76	80	80
Rural	--	41	50	57	55	65	70	70

### Q:

In the past 3 months, have you used the Internet, either at home or elsewhere?

(BASE: All Canadians; July 06, n=4,518)

## Home Internet Access

% of Canadians with home Internet access

	1997	1999	2000	2001	2002	2003	2005	2006
<b>All Canadians</b>	28	44	51	59	62	67	72	75
<b>Gender</b>								
Males	33	50	56	62	66	70	74	77
Females	23	39	47	50	58	64	70	72
<b>Age</b>								
25 and under	39	57	69	73	77	79	83	88
25 — 44	32	48	57	66	68	75	80	83
45 — 64	29	44	50	56	61	65	72	74
65 and over	6	20	22	29	29	40	41	44
<b>Household Income</b>								
<\$20k	16	23	31	35	42	42	49	56
\$20 — \$39k	20	30	39	46	51	55	61	63
\$40 — \$59k	27	46	54	60	62	70	74	76
\$60 — \$79k	40	57	64	72	73	80	83	83
\$80 — \$99k	49	65	68	81	79	86	87	91
\$100k +	55	76	80	83	86	89	89	92
<b>Region</b>								
British Columbia	32	51	57	63	69	73	80	81
Alberta	31	48	49	63	56	69	75	81
Prairies	21	38	46	53	54	64	67	71
Ontario	30	50	59	64	66	72	77	78
Quebec	23	34	42	50	56	58	64	64
Atlantic Canada	28	38	44	50	60	62	59	72
<b>Location</b>								
Urban	--	47	54	62	66	69	74	76
Rural	--	35	43	49	51	59	64	67

### Q:

Do you currently have access to the Internet at home?

(BASE: All Canadians; July 06, n=4,518)



## E-commerce

% of Canadians who have bought online

	2000	2001	2002	2003	2005	2006
<b>All Canadians</b>	19	25	29	34	43	45
<b>Gender</b>						
Males	23	30	34	39	48	49
Females	14	20	23	29	39	41
<b>Age</b>						
25 and under	22	25	32	37	50	55
25 — 44	24	33	35	44	54	55
45 — 64	16	22	28	30	40	42
65 and over	5	9	11	12	16	18
<b>Household Income</b>						
<\$20k	9	11	9	16	22	28
\$20 — \$39k	11	16	19	23	32	34
\$40 — \$59k	21	25	30	32	45	41
\$60 — \$79k	28	33	42	44	53	53
\$80 — \$99k	31	39	46	52	60	63
\$100k +	38	47	57	60	67	74
<b>Region</b>						
British Columbia	24	31	35	37	54	53
Alberta	20	24	29	37	44	53
Prairies	17	22	28	32	38	43
Ontario	22	30	34	38	47	50
Quebec	11	15	18	24	34	32
Atlantic Canada	18	24	27	31	37	42
<b>Location</b>						
Urban	20	27	31	36	45	47
Rural	13	19	20	26	34	36

### Q:

Have you ever purchased a product or service over the Internet?

(BASE: All Canadians; July 06, n=4,517)

## Internet banking

% of Canadians banking online

	2000	2001	2002	2003	2005	2006
<b>All Canadians</b>	16	24	27	32	43	46
<b>Gender</b>						
Males	21	27	28	35	46	48
Females	12	21	25	28	40	44
<b>Age</b>						
25 and under	14	21	25	33	47	50
25 — 44	24	35	35	42	56	60
45 — 64	14	21	25	28	39	42
65 and over	5	6	9	11	15	18
<b>Household Income</b>						
<\$20k	6	12	12	15	23	27
\$20 — \$39k	12	16	20	24	33	37
\$40 — \$59k	18	25	29	32	47	48
\$60 — \$79k	26	33	41	43	54	58
\$80 — \$99k	28	40	44	49	61	65
\$100k +	31	41	43	53	61	70
<b>Region</b>						
British Columbia	23	32	28	38	48	51
Alberta	19	24	29	30	44	50
Prairies	14	23	15	28	38	42
Ontario	17	27	30	34	46	49
Quebec	13	17	23	27	39	39
Atlantic Canada	14	19	26	28	37	40
<b>Location</b>						
Urban	17	26	29	34	45	48
Rural	13	18	18	24	34	38

**Q:**

Do you do any of your personal banking either using the Internet or the telephone?

(BASE: All Canadians; July 06, n=4,518)

## Comfort sending taxpayer information online

% of Internet users reporting high comfort (5-7 on 7-point scale)

	2000	2001	2002	2003	2005	2006
<b>All Canadians</b>	53	53	55	55	64	63
<b>Gender</b>						
Males	56	60	57	57	67	66
Females	49	47	51	53	61	61
<b>Age</b>						
25 and under	43	47	52	58	58	56
25 — 44	56	56	57	60	70	68
45 — 64	55	54	55	50	62	64
65 and over	44	50	38	43	53	55
<b>Household Income</b>						
<\$20k	47	46	48	46	47	52
\$20 — \$39k	49	49	46	48	61	59
\$40 — \$59k	58	54	56	60	67	64
\$60 — \$79k	62	59	68	62	70	64
\$80 — \$99k	61	63	67	62	74	77
\$100k +	65	64	70	71	77	84
<b>Region</b>						
British Columbia	51	55	55	59	68	64
Alberta	56	56	50	59	61	63
Prairies	55	51	38	51	65	66
Ontario	53	55	61	56	65	64
Quebec	52	47	50	53	61	58
Atlantic Canada	48	50	53	47	66	60
<b>Location</b>						
Urban	53	53	56	56	66	65
Rural	47	50	47	50	56	56

### Q:

How comfortable would you be submitting your personal taxpayer information over the Internet to the Canada Revenue Agency, formerly Revenue Canada? Please use a scale from 1 to 7, where 1 is not at all comfortable, 7 is extremely comfortable, and 4 is somewhat comfortable.

(BASE: Internet Users; July 06, n=1,691)



## **Appendix B: Research Methodology**

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# Research Methodology

The research methodology for this study involved a panel-based design, with respondents completing a telephone survey in the first wave and a self-administered mail-back survey in the second. The final reports combine the findings of both waves.

The results from the first wave are based on the following:

- A telephone survey completed with a stratified national random sample of 4,518 Canadians, aged 16 and over undertaken between July 10th and 28, 2006.
- The findings were statistically weighted by age, gender and region to ensure that they are representative of the Canadian public aged 16 and over.
- In areas, the survey was designed to randomize questions in order to test differences in attitudes across various indicators as well as to minimize response burden. Correspondingly, some questions were given to a random half of the overall sample (i.e., approximately 2,250 Canadians). In other areas, some questions were given to a random quarter of the overall sample (i.e., approximately 1,125 Canadians).
- Findings from questions posed on wave one full sample may be considered accurate within +/- 1.4 percentage points, 19 times out of 20. The margin of error half sample and quarter sample questions are +/- 2.1 and +/- 2.9, respectively.

The results from the second wave are based on the following:

- A self-administered mail-back survey was mailed to 2,813 respondents from the wave one survey who wished to participate in the second wave of the research.
- Several procedures to increase response rate were followed including a complete re-mailing of the survey as well as a lottery with appropriate prizes to encourage participation.
- 1,582 completed surveys were received between the beginning of August and end of October 2006.
- Wave 2 results are weighted by age, gender and Internet usage.
- Findings from questions posed on Wave 2, full sample, may be considered accurate within +/- 2.5 percentage points, 19 times out of 20.