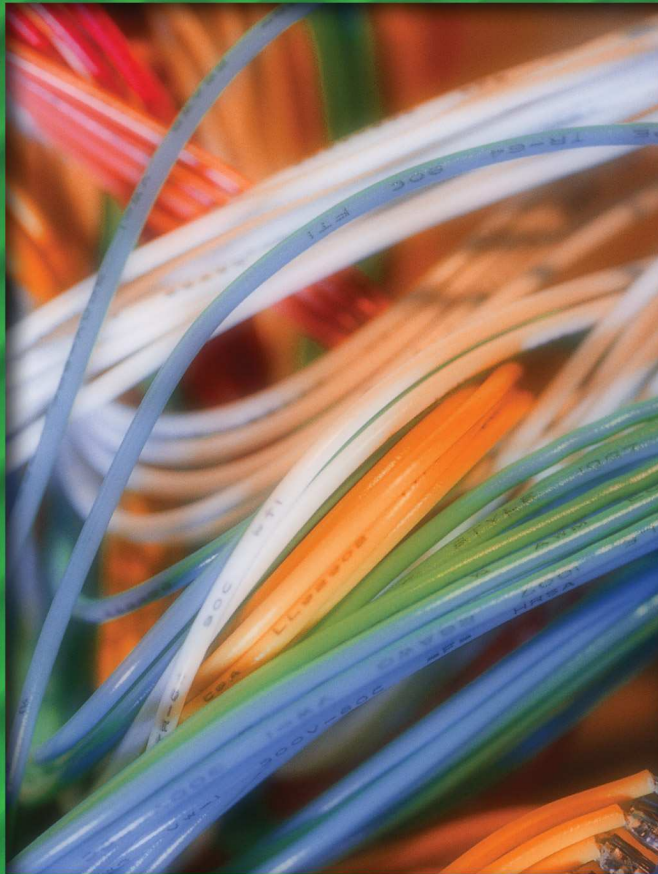


2006 • 2007

PART OF THE **INFORMATION HIGHWAY** STUDY



EKOS

Health Information and the Internet

Health Information and the Internet

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

In the past decade, the health information environment has undergone dramatic changes partly due to the impact of the Internet and its role in Canadian interactions. While previous methods of finding information and interacting with health officials required a more lengthy and extensive method, the Internet has created an environment that offers convenience and speed.

As the Internet continues to rapidly evolve, offering improved access to services and information, it is of the outmost importance to ensure Canadians are receiving accurate and up to date health and medical related information. By determining what information Canadians research, where it is received, and the overall implication of this information to their health related interactions, appropriate policy changes and adaptations can be facilitated in order to ensure the best possible environment for Canadians in their health interactions.

This report is designed to focus on the changes occurring in the health information network online, and to provide decision makers in that area with a sense of the current trends, expectations and preferences of Canadians' online health related interactions.

Overview

The methods in which Canadians obtain health information has changed dramatically since the introduction of the Internet as a convenient and rapid source of information. However, despite its widespread adoption, health care providers must ensure Canadians are being given accurate and up to date information to ensure they make informed decisions and improve the quality of their health interactions.

Search for health information

Trends among Canadians searching for information:

Searching for health or medical related information remains widespread. In fact, almost 6 in 10 Canadians have searched for this type of information in the past year alone. Canadians continue to search for health information at a rate similar to that of 2005, certain demographics, most notably higher income households, women and Canadians between the age of 25 and 45, are more likely to search for information than others. Somewhat surprisingly, seniors rate lowest among age groups that search for health related information, regardless of the source.

Primary sources for health information:

Although print media continues to be the most commonly cited source of health information for Canadians, the Internet's influence as a primary source continues to increase. Consistent with other trends, Canadians under the age of 45 are more inclined to use the Internet as their primary source of information while those older opt for print media. With all of print media, the Internet and television testing at similarly high levels, all three can be seen as essential tools for Canadians in their information search.

Search for health information and the Internet

Internet's significance as a method of finding information:

The Internet's significance in searching for health related information is evident by the overwhelming majority of Canadians that have used it within the past year as part of their search. In fact, 9 in 10 of all Canadians who have searched for this type of information in the past year turned to the Internet at some point. Coupled with a high level of users expressing an appropriate amount of conciseness and complexity in their information, Canadians consider the Internet an important source for health related information, a trend that continues to become more entrenched year after year.

Health information complementing medical visits:

Canadians tend to be evenly divided as to when they search for health information online; prior to or after an appointment with a health professional. Of interest, demographic differences exist with younger Canadians more inclined to look for information before seeing a professional whereas older Canadians did so after.

Health websites

Canadians making use of a variety of websites:

Not surprisingly, with 4 in 5 Canadians using a search engine to find health related information, Canadians are increasingly visiting a full range of websites, including non-profit organizations, government, professional medical associations and commercial websites for online research. Although there has been little change in terms of visits to Canadian and American

websites, Canadians are increasingly making use of websites from other countries.

Low familiarity with some websites:

For now, Canadians generally report low awareness of the Canadians Health Network website, and a little less than 2 in 10 users have visited this website in the past year. Similar numbers have visited the website of the Public Health Agency of Canada. In comparison, nearly 1 in 3 users have visited Health Canada's website in the past year.

Online health activities

Few Canadians participating in online health activities:

Overall, there has been little change in online interactions in relation to exchanges with medical professionals and purchasing medication. In fact, only a small percentage of Canadians — somewhere between 2 and 6 per cent — have done any online interactions such as purchasing prescriptions, exchanging email with a medical professional, or participating in an online chat/support group. Most likely due to the personal nature and immediacy of these interactions, Canadians continue to perform these exchanges in person.

Online health information and health care

Benefits of sharing health information:

Canadians who have searched for health related information online are increasingly becoming more likely to share that information with their health care provider.

Those that have done so express an overall positive reaction from their health care provider and believed their inquiry led to improved health care. As a result, these positive reactions have encouraged patients to continue researching information for dialogue.

Privacy, security and health care

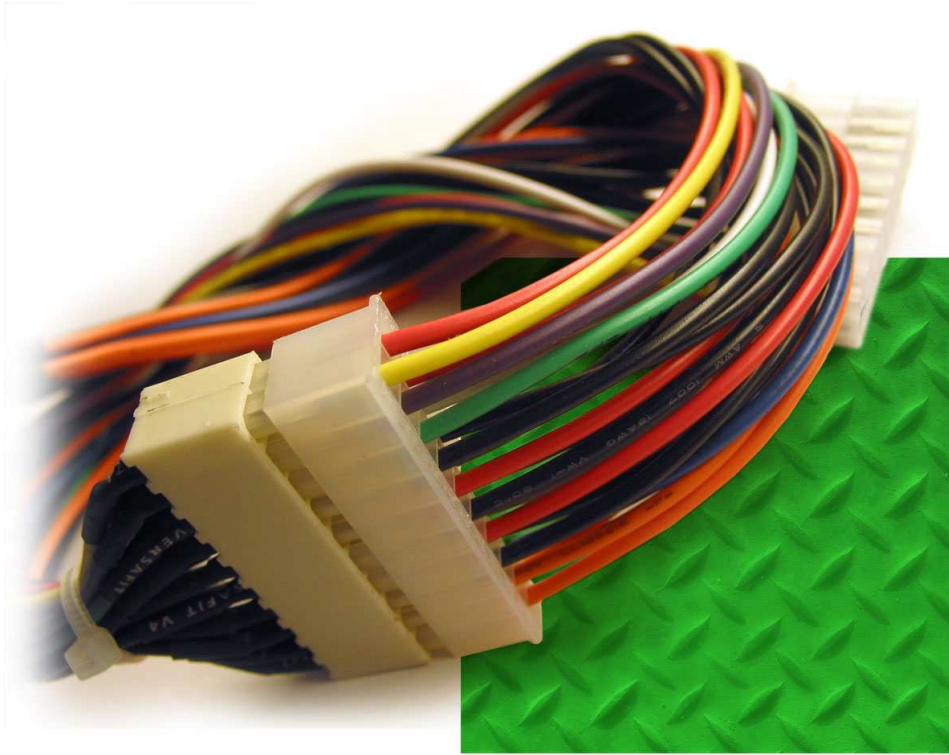
Security safeguards have improved overall comfort:

Overall confidence in safety and protection of personal health care information is up slightly, explaining in part the greater comfort with the notion of submitting health information online to medical professionals. While only a small fraction of Canadians have withheld information or have opted not to see a health care provider over security concerns, it is still troubling that it is happening at all.

Electronic health records

Low levels of awareness afflict EHRs:

General awareness of EHRs remains low. With Canadians relatively unaware of EHRs, it is not surprising that comfort levels vary considerably. Despite the need to improve overall awareness, a strong majority of all Canadians support the development of EHRs.



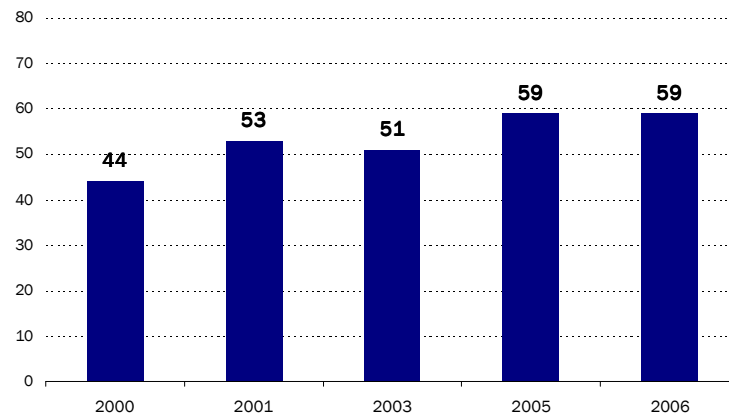
Search for health information

Highlights

- Of the 3 in 5 Canadians who search for health information, those from higher income households, women and Canadians in the 25-44 age segment were more likely to search for health related information.
- Those who have searched for health information have primarily done so for personal needs, searching for various types of medical related information including: specific diseases, lifestyle, drugs and medications and specific conditions and symptoms.
- Canadians use a wide array of sources to find health related information. Although print media continues to be the main source for health related information, the Internet continues to play a prominent role.

The overwhelming majority continue to search for health information:

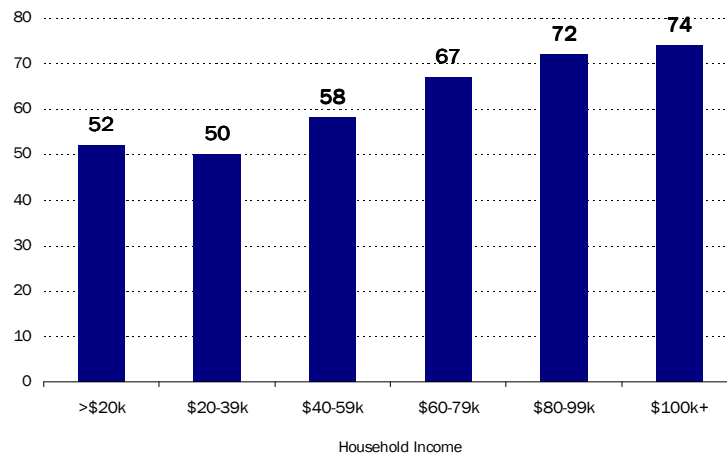
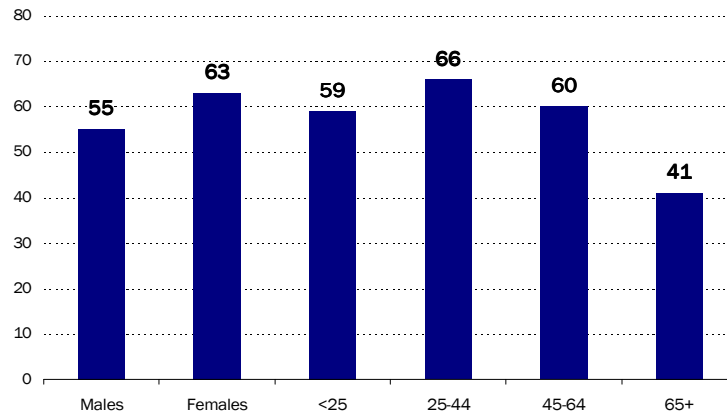
Remaining unchanged from 2005, close to 3 in 5 Canadians searched for health and medical related information in the past year.



Q:
In the past year, have you searched for any health or medical-related information?
(BASE: All Canadians; July 06, n=2294)

Noteworthy variations in demographics:

Those from higher income households, women and Canadians in the 25-44 segment were more likely to search for health and medical related information. Interestingly, those aged 65+ were least likely.

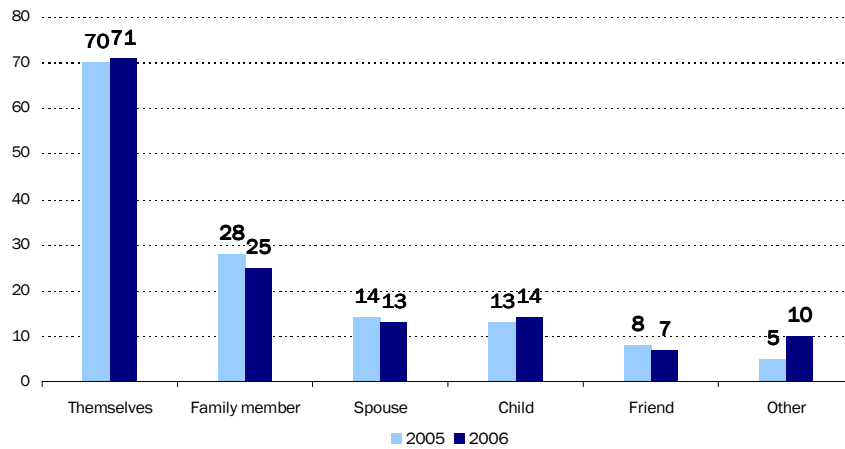


Q:
In the past year, have you searched for any health or medical-related information?
(BASE: All Canadians; July 06, n=2294)

Health and medical-related information is typically sought after for personal use. While the nature of this information relates primarily to both self-diagnoses and the diagnoses of healthcare providers, **Canadians are taking an active interest in their well-being by searching for lifestyle information.** Canadians are also turning to print media, the Internet and television as their primary sources for health and medical related information. While the Internet is a little less common than print media overall, it is important to recognize that it is the most important source for those under 45.

Health information sought out primarily to meet personal needs:

Although 1 in 4 searches for health information were conducted on behalf of family members, the majority were conducted to meet personal needs and interests.



Q:

On whose behalf were you looking?

(BASE: Those who searched for health information in past year; July 06, n=1354)

Types of health information searched

(Per cent who have searched for health information in past year)

			Gender		Age Group			
	2005	2006	Male	Female	<25	25-44	45-64	65+
Information on specific disease	27	31	29	33	26	27	36	38
Lifestyle	18	18	18	17	14	19	19	12
Drugs/medications	16	16	16	17	12	17	17	15
Specific conditions	16	16	17	15	15	14	18	18
Specific symptoms	13	15	15	14	10	17	13	17
General health info	17	13	12	14	16	16	12	15
Cancer research	6	6	5	7	6	4	7	8
Alternative therapy	5	5	4	5	2	5	6	5
Health care system	3	5	5	5	3	5	6	4
Information on surgery	4	4	3	4	4	4	3	4
Pregnancy-related info	2	2	1	3	1	5	--	--
Finding a doctor	1	1	1	2	1	1	1	2
Treatment (general)	--	--	--	--	--	--	--	--
Other	9	13	13	13	16	16	8	10
DK/NR	6	4	5	3	5	4	4	3

Q:

What types of health or medical-related information were you looking for?

(BASE: Those who searched for health information in past year; July 06, n=1356)

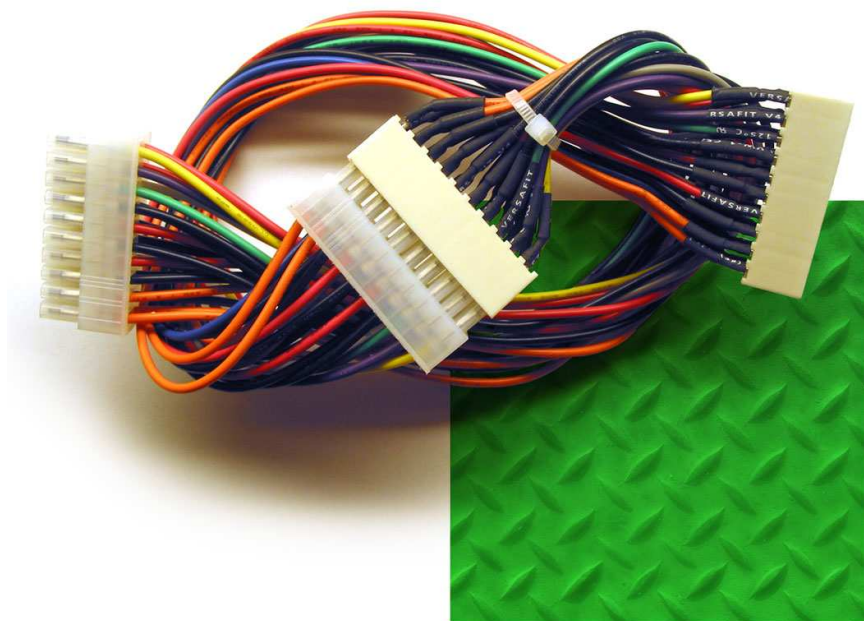
Primary sources of health information

(Per cent)

	Print (news- papers, magazines)	TV	Radio	Internet websites	Internet blogs and forums	Other
All Canadians	54	48	22	48	2	23
Age						
25 and under	47	36	15	49	2	28
25 – 44	46	47	20	60	3	24
45 – 64	61	50	24	46	3	24
65 and over	67	51	31	19	0	17
Internet users	51	43	19	61	3	24
Non-Internet users	65	64	34	4	0	20

Q:

Where do you primarily get information on the following topics ... health information?
(BASE: All Canadians, Aug./Sept. 06, n=1586)



Search for health information and the Internet

Highlights

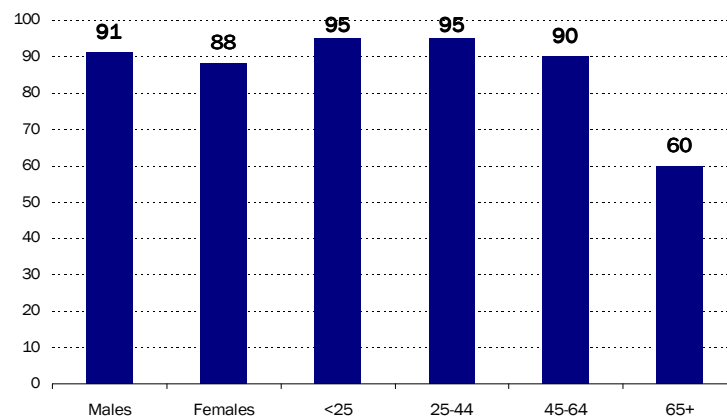
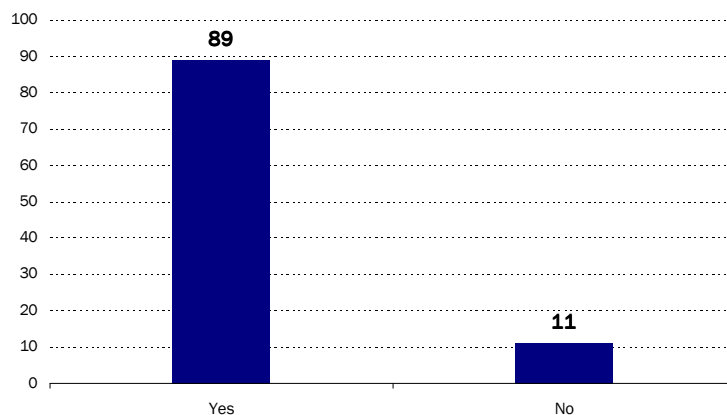
- The Internet is increasingly employed by the majority of Canadians as a starting point for finding health information. Only seniors test low among groups who use the Internet for health information, although a strong majority of this group still did.
- Canadians increasingly believe in the Internet's significance and importance when it comes to health or medical related information.
- Canadians tend to evenly look for health related information before and after seeing a medical professional.

The Internet is increasingly **employed as a useful and reliable starting point in searches for health and medical related information.**

Material found online is deemed suitable for general use by the overwhelming majority.

The Internet facilitates searches for health information:

Almost 9 in every 10 seeking health information in the past year turned to the Internet as a means to this end. Despite the greater likelihood of women seeking out health information, men were slightly more likely to do so online.

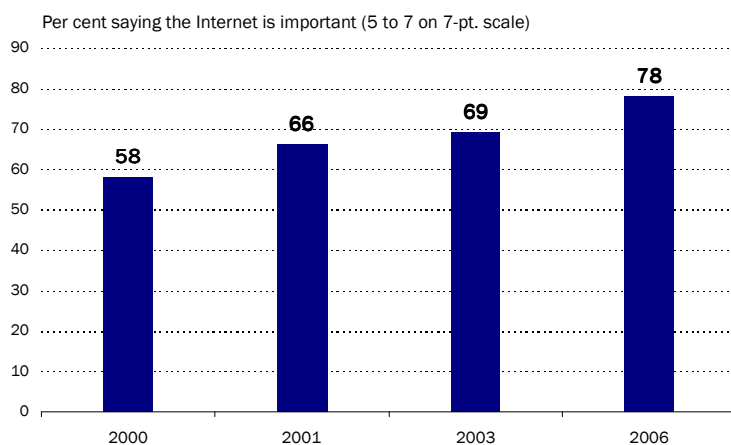
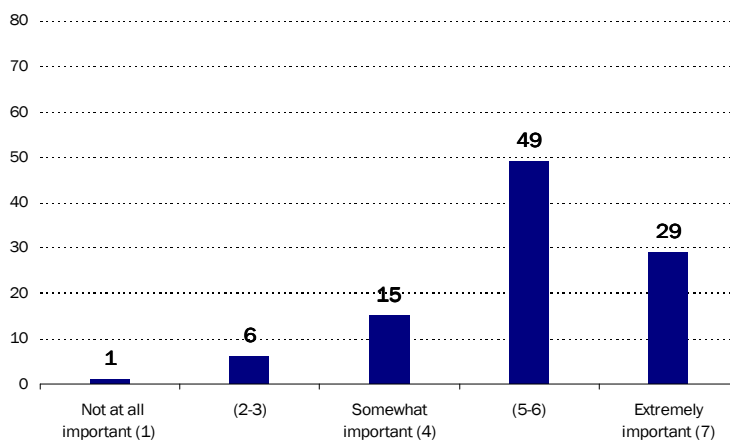


Q:
Did you use the Internet at all during your search?
(BASE: Those who searched for health information in past year; July 06, n=1354)

Not only do the overwhelming majority of Canadians who have searched for health information go online, almost 3 in 10 say that it was 'extremely' important. Overall, nearly 8 in 10 say that it is important, a response that is up sharply over the years.

Majority consider the Internet a significant source for information:

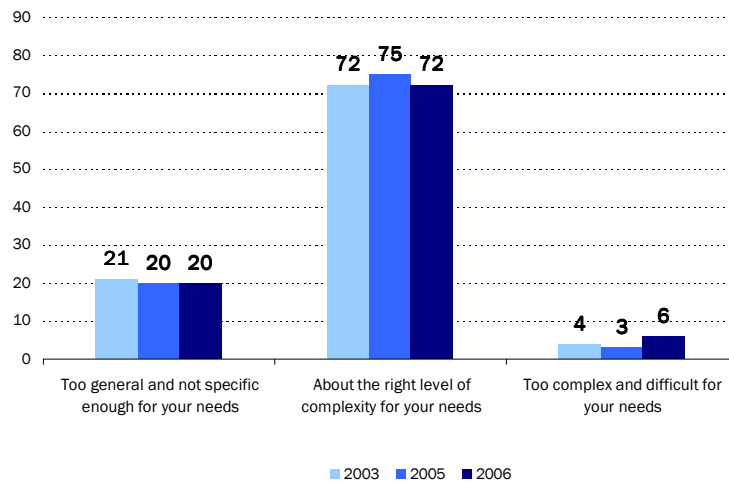
Almost 4 in 5 seeking health information perceived the Internet as a major source for health information, reinforcing how fast the Internet is become an essential tool in this regard.



Q:
How important is the Internet as a source for health or medical-related information?
(BASE: Those who searched for health information in past year; July 06, n=1191)

Health information online is generally considered clear and useful:

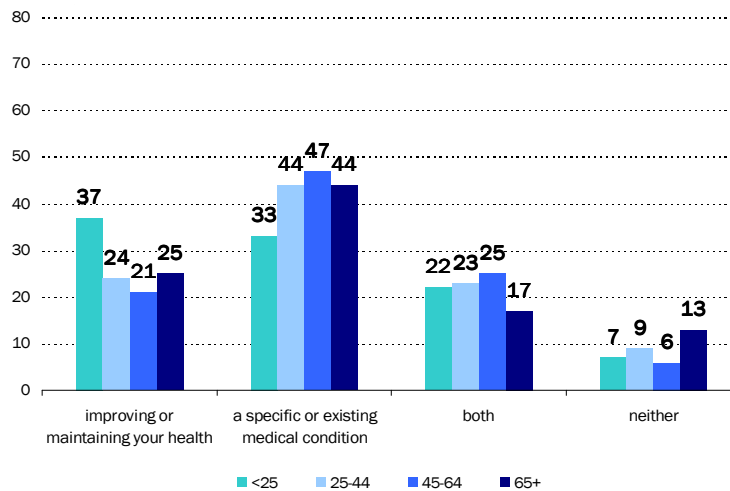
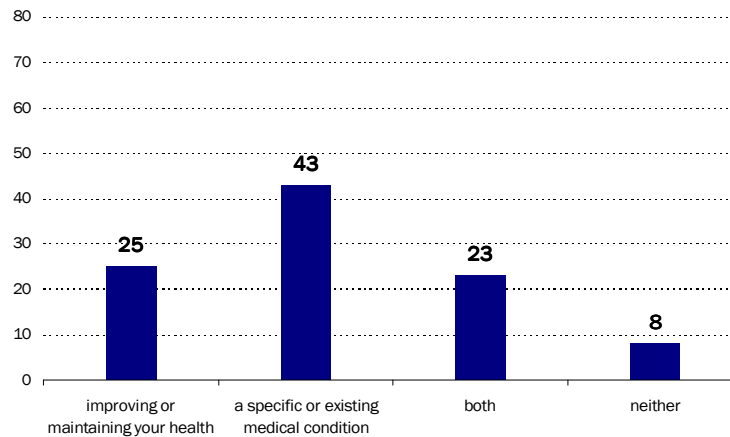
Although the perceived complexity of information found online increased slightly over the past year, over 7 in 10 still consider information as being “about the right level of complexity”.



Q: Thinking again about what you found on the Internet, would you say the health or medical-related information was typically ...?
(BASE: Those who searched for health information online in past year; July 06, n=1191)

Online searches more often prompted by specific or existing conditions:

While a higher proportion of online searches for medical information were driven by specific or existing medical conditions, there is a sharp generational pattern with younger Canadians conducting more searches to improve or maintain their health.

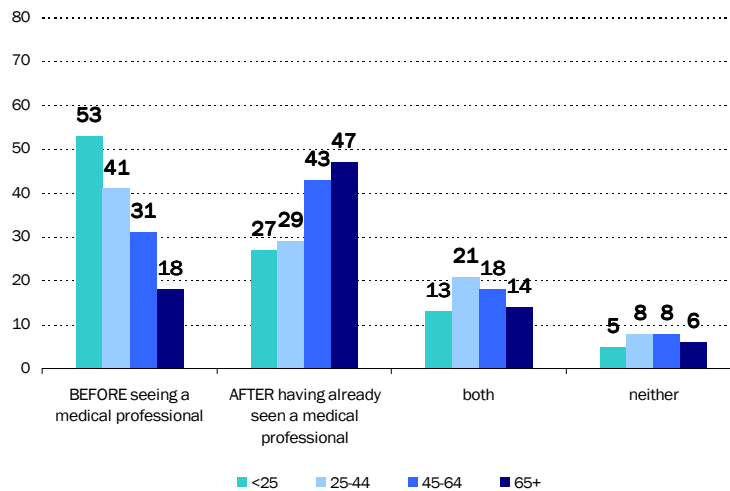
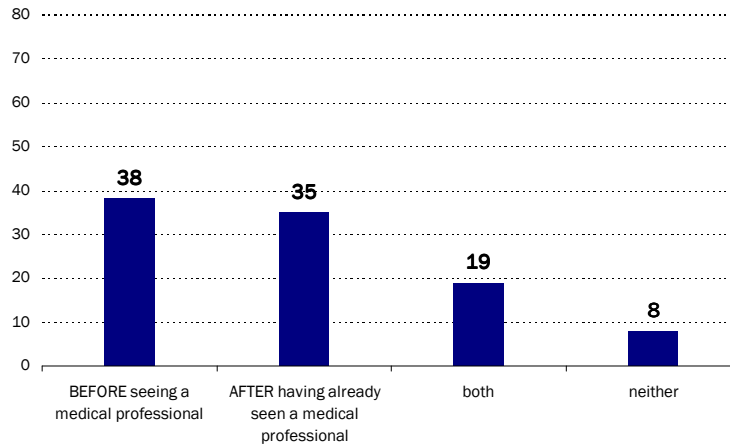


Q:
Were you looking for online health or medical-related information regarding...?
(BASE: Those who searched for health information online in past year; July 06, n=1191)

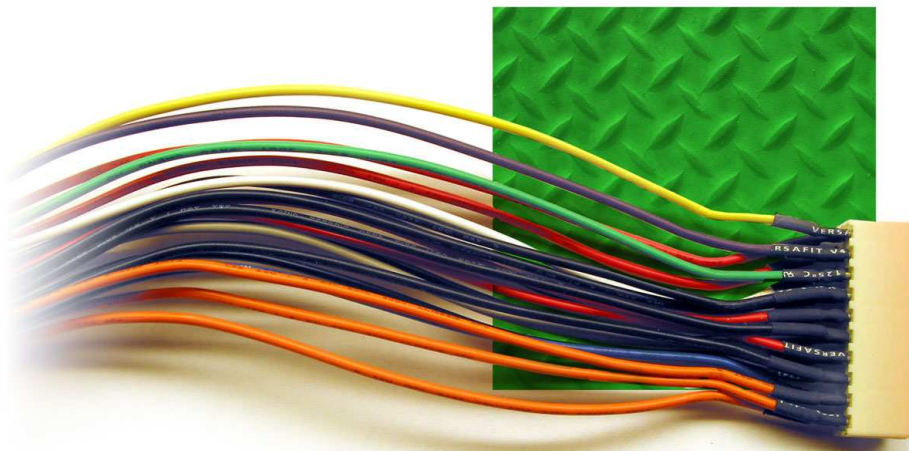
Health information found online is often accessed to complement visits with medical professionals. While there are some demographic differences, **Canadians have a general tendency to look for additional information both before and after meeting with doctors.**

Health information sought before and after seeing a medical professional:

Many Canadians sought out health information online before seeing medical professionals, although a sizeable number of others did so afterwards as well. Younger Canadians were slightly more inclined to conduct searches before seeing a medical professional whereas older Canadians did so after.



Q: And which best describes WHEN you were looking for health or medical-related information on the Internet?
(BASE: Those who searched for health information online in past year; July 06, n=1191)



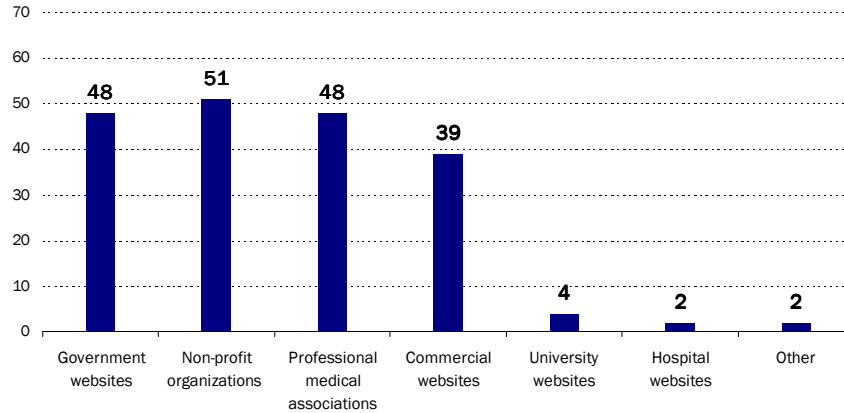
Health websites

Highlights

- Canadians are increasingly visiting a variety of websites to search for health information. Led by non-profit organizations, Canadians are also making use of professional medical associations, government and commercial websites.
- While Canadian health websites are by far the most frequent, half of all Canadians who search for medical information online make use of American websites. While the volume of visits to Canadian and American websites has shown little change, visits to other countries continue to increase.
- Familiarity with the Canadian Health Network website remains generally low with less than 2 in 10 users having made a visit in the past year. Almost a third of users have visited the Health Canada website in the past year.

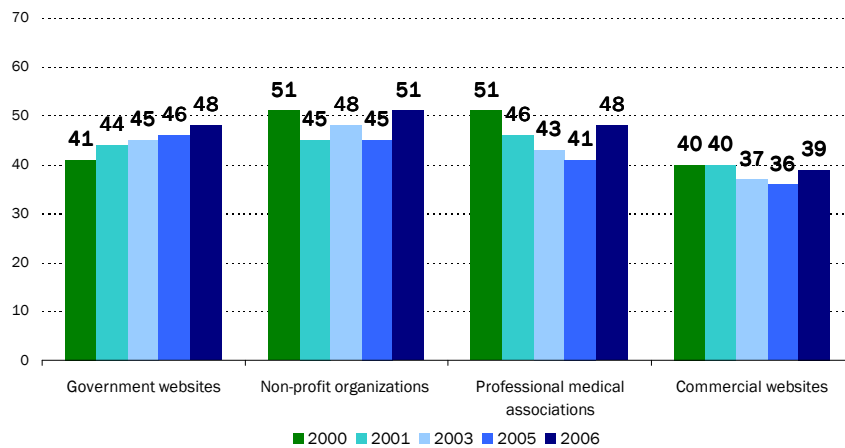
A wide variety of websites are being frequented for health information:

Those searching for health information online are visiting a broad range of websites. The most popular involve non-profit groups, government, professional medical associations and commercial websites.



Visits to each major website type have increased:

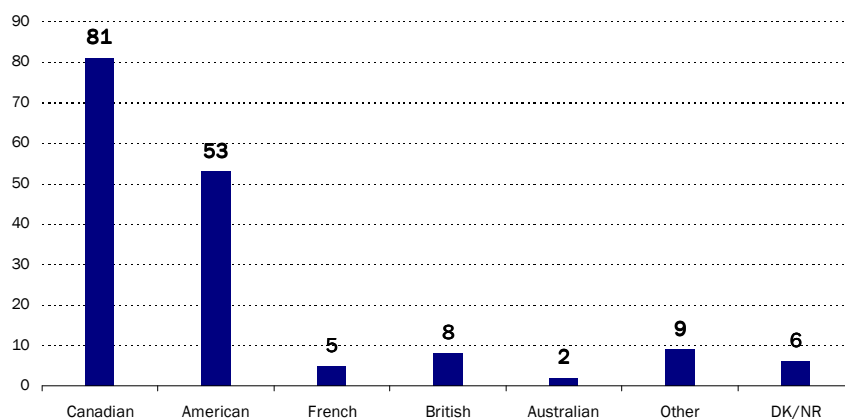
The usage of all major website types is up from last year. A noticeable pattern surrounds government websites, whereby visits have grown slightly each year.



Q:
In the past year, what types of health or medical-related websites have you visited?
(BASE: Those who searched for health information online in past year; July 06, n=1191)

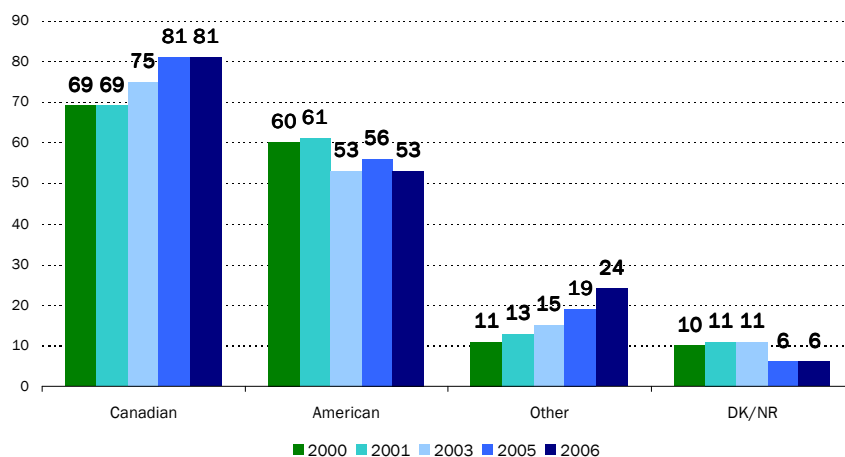
The majority of visits are to Canadian and American websites:

While Canadian health websites are by far the most frequent, with 4 in 5 visits to those sites, American sites also play a significant role in disseminating health information online.



Visits to Canadian and American websites changed only slightly:

Little change has occurred in terms of the visits to Canadian and American websites, although visits to websites from other countries continue to increase.



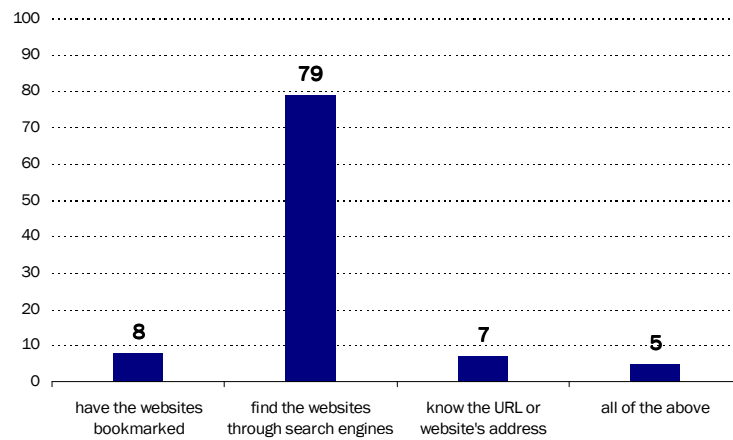
Q:

Were the health or medical-related websites that you visited Canadian, American or from other countries?

(BASE: Those who searched for medical information online; July 06, n=1191)

Search engines typically used to find health websites:

For the most part, Canadians find health and medical-related websites predominantly using search engines.



Q: When searching for health or medical-related information on the Internet, would you say you typically ...?
(BASE: Those who have searched for health information online; July 06, n=1191)

Most Trusted Source of Health/Medical related Information

(Per cent)

	2006
Health Canada website	18
General search engine	15
WebMD	12
Provincial government health website	8
Mayo Clinic	5
Not-for-profit organization	4
Canadian Health Network	3
Doc.tis.simo	3
Med Broadcast.com	2
Other federal government websites	2
Other	9

Q:

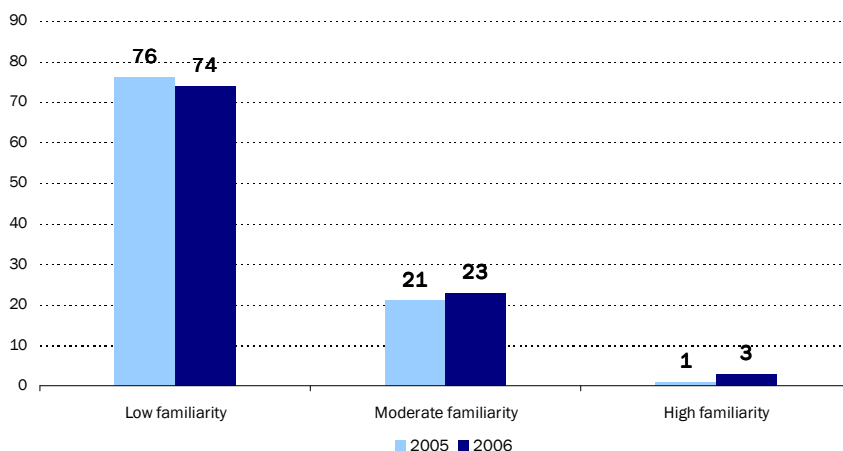
Which one website is your most trusted source of health/medical-related information?

(BASE: Internet users who have a most trusted health/medical-related website; Aug./Sept.06, n=170)

Although general familiarity with the CHN website is up from last year, **a large portion of Canadian Internet users remain unfamiliar.** Those who visited the site recommended advertising and making the website more user-friendly to boost familiarity.

Slight overall increase in familiarity with the CHN website :

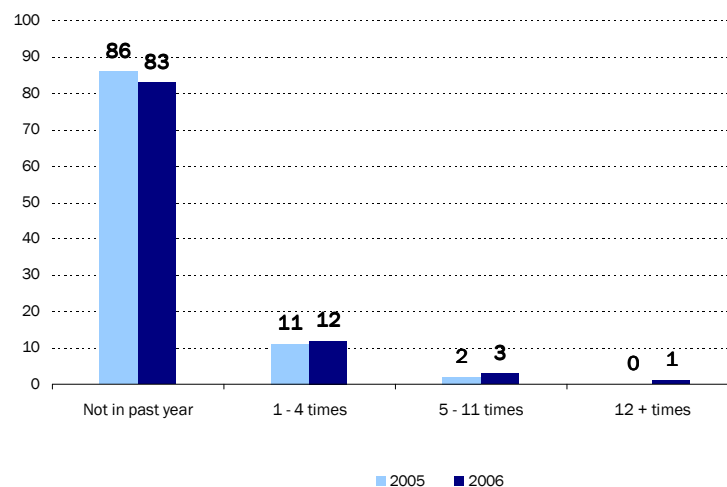
Although overall familiarity remains generally low, both moderate and higher levels of familiarity with the CHN website increased slightly from last year.



Q:
How familiar are you with the Canadian Health Network website, a website that provides health information from a network of partners, including Health Canada, non-profit organizations, universities, hospitals, libraries and community organizations?
(BASE: Internet users; Aug./Sept. 06 06, n=1149)

Nevertheless, infrequent visits in limited numbers to the CHN website:

Given that the majority is still largely unfamiliar with the CHN website, it is not surprising that there have been infrequent visits to the site in limited numbers. Less than 2 in 10 Canadians visited in the past year.



Q:
Thinking about the past year, how often have you visited the Canadian Health Network website?
(BASE: Internet users; Aug./Sept. 06 06, n=1149)

Suggested Improvements to the CHN Website

(Per cent)

	2006
Make user friendly	9
Advertise/Market	4
Offer access to live help	2
Offer more credible info	2
Access personal info	1
Info on therapy/alternative health	1
Comprehensive medical info	1
Info on current research postings	1
Other	1
Do not change anything	1
Don't know	77

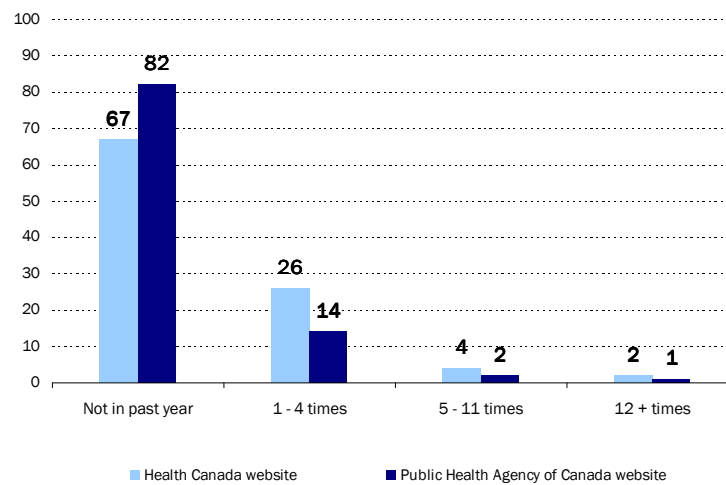
Q:

What one thing should the Canadian Health Network do to improve its website?

(BASE: Internet users who have visited the CHN website in the past year; Aug./Sept.06, n=184)

Visits to the Health Canada website and PHAC website far from insignificant:

While the majority have not visited the websites of Health Canada or PHAC in the past year, there are still a significant number of users who have done so.



Q: Thinking about the past year, how often have you visited ... the Health Canada website/the Public Health Agency of Canada website?
(BASE: Internet users; Aug./Sept. 06 06, n=1149)

Canadians have a clear preference for where they look for trusted and accurate health information. **Led by the Health Canada website, Canadians also believe non-profit organizations, and professional medial associations are the most trustworthy.** Despite these figures, overall confidence in reliable medical information is down slightly.

Confidence in quality of information

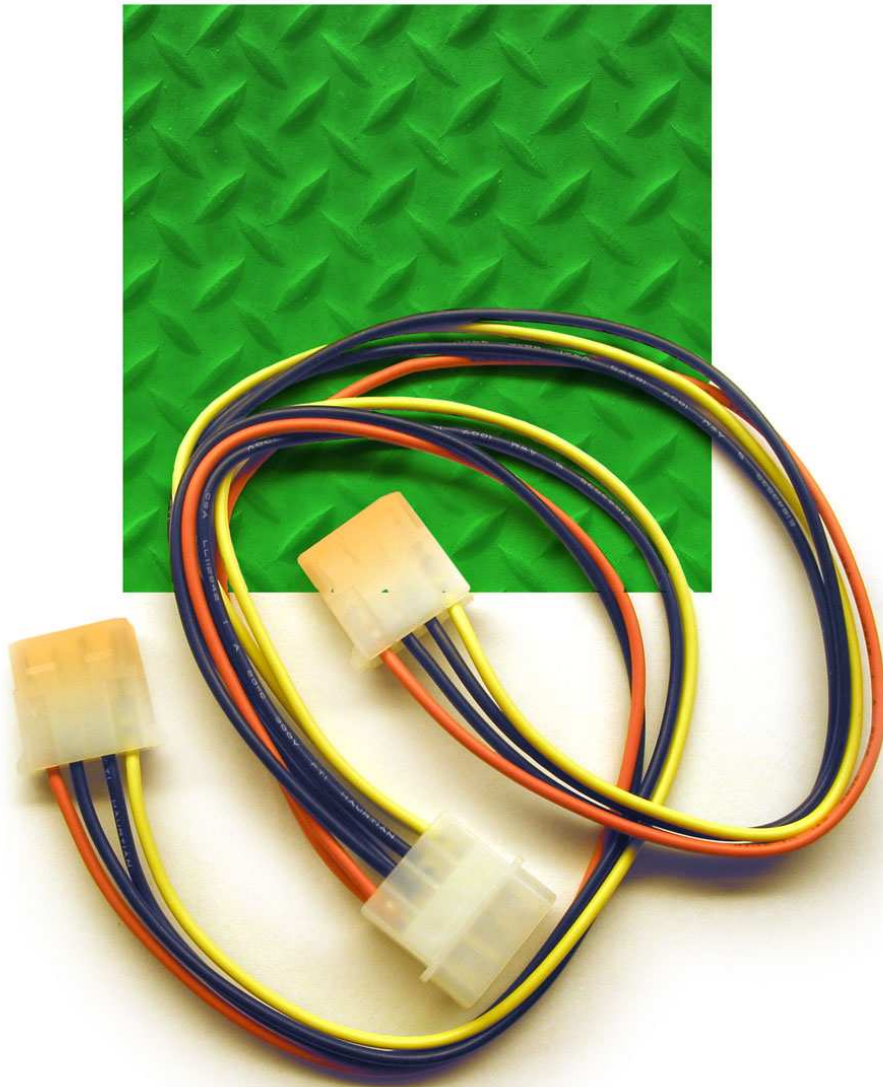
(Per cent)

	Not at all confident (1)	(2-3)	Somewhat confident (4)	(5-6)	Extremely confident (7)	Average level of trust
Health Canada website						
2005	2	7	19	53	16	5.20
2006	3	9	26	47	12	4.95
Public Health Agency of Canada Website						
2006	3	11	25	47	11	4.87
Website of a professional medical association such as the Canadian medical association						
2005	3	12	20	50	12	4.93
2006	3	12	23	48	10	4.85
The website of a non-profit organization such as the Canadian Cancer Society						
2005	3	8	21	53	13	5.07
2006	3	11	26	47	10	4.82
The Canadian Health Network site						
2005	3	11	27	47	7	4.72
2006	4	11	30	43	8	4.66
The website of a pharmaceutical company						
2005	16	37	23	18	3	3.28
2006	16	37	25	17	1	3.23
A commercial website such as webMD or DrKoop						
2005	13	37	26	19	1	3.35
2006	16	38	28	14	1	3.16
An Internet chat group on health and medical-related issues						
2005	23	51	17	5	0	2.57
2006	25	48	18	5	1	2.57

Q:

How confident are you that any health or medical-related information on the following websites would be trustworthy and accurate?

(BASE: Internet users; Aug./Sept.06, n=1149)



Online health activities

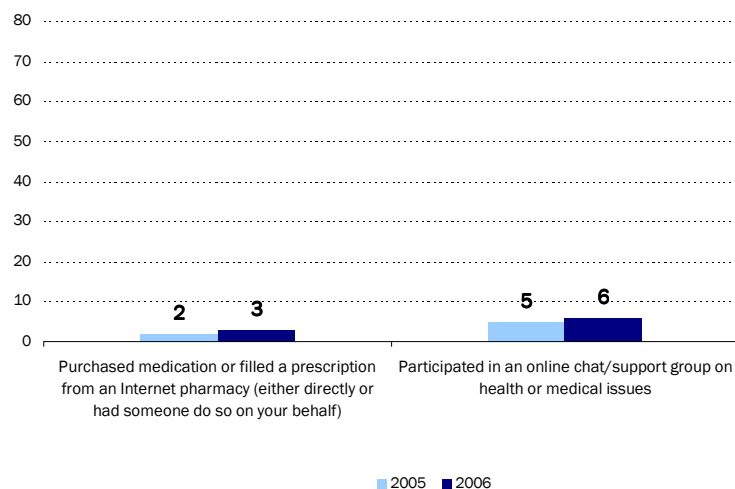
Highlights

- Canadians continue to contact health professionals online at a similar rate to previous years, however participation in online support groups and Internet pharmacy usage have shown a slight upwards trend.

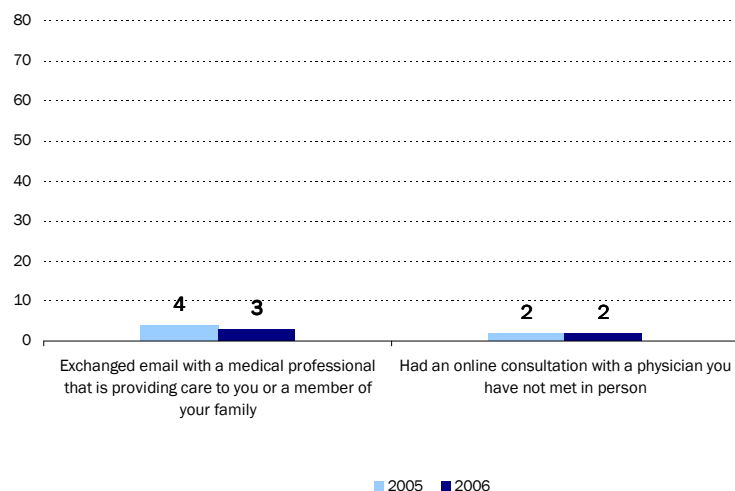
While online interaction with medical professionals remains at a standstill, **there is a slight upwards trend in the purchase of pharmaceuticals online** and participation in online communities dealing with health or medical issues.

Online activities related to health have shifted slightly since last year:

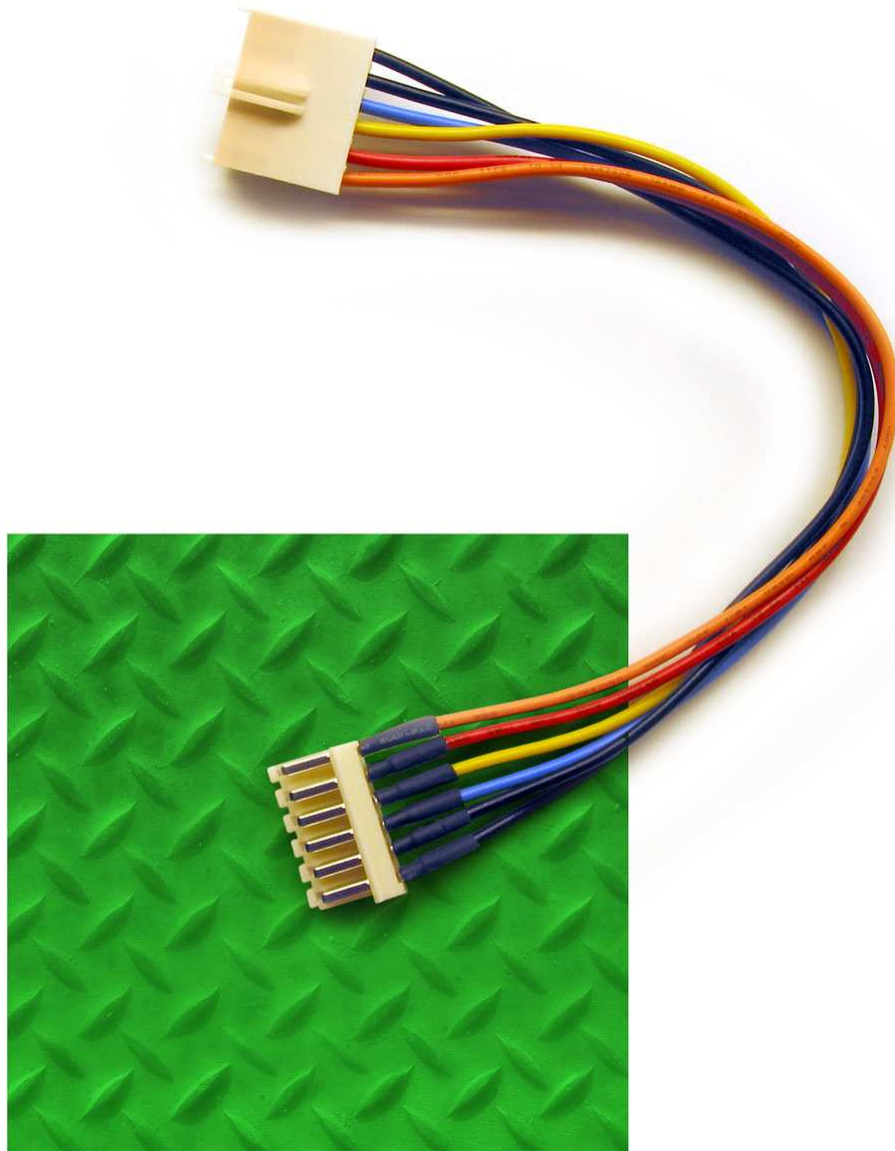
While medication purchased from an Internet pharmacy and participation in online chat groups/support groups on health both increased slightly, the amount of emails exchanged with health care professionals and online consultations remained the same.



Q:
In the past year, have you ... ?
(BASE: All Canadians; Aug./Sept. 06 06, n=1586)



Q:
In the past year, have you ... ?
(BASE: All Canadians; Aug./Sept. 06 06, n=1586)



Online health information and health care providers

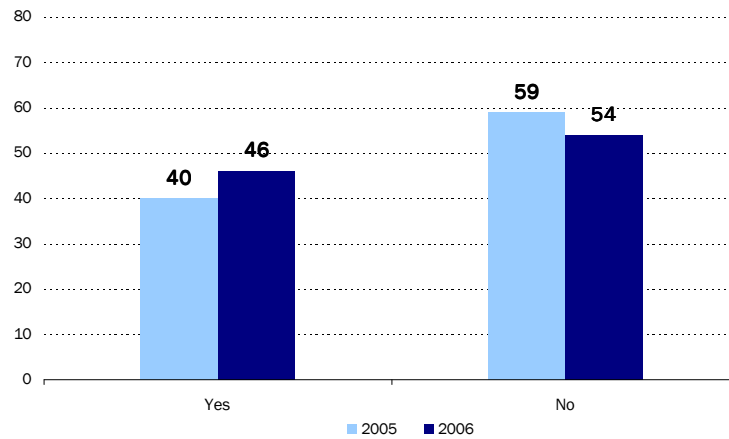
Highlights

- Online health information is promoting informed dialogue between patients and health care providers with a significant amount of Canadians expressing positive reactions in their interactions.
- Canadians are more inclined to believe that discussions with their health care provider about online health information lead to overall better care. As a result, the majority of Canadians that have spoken to their health care provider about information found online are likely to do so again.

Online health information is viewed as improving healthcare in Canada insofar as more **approached medical professionals as informed patients able to partake in fruitful dialogue.**

Information found online increasingly shared with health care providers:

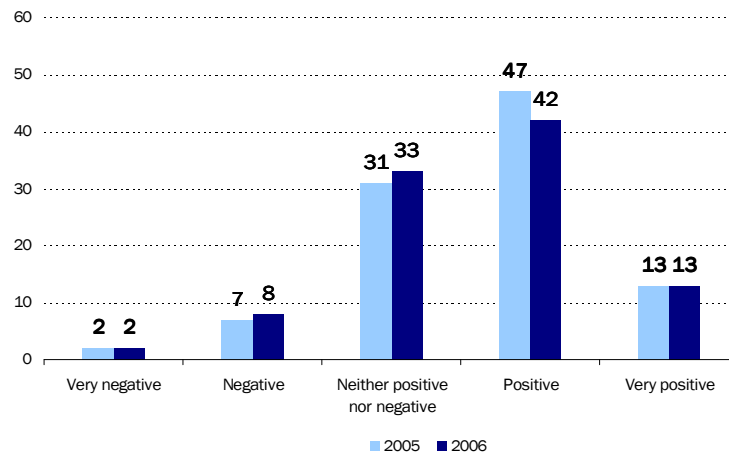
While the majority continue not to discuss information found online with doctors and health care providers, a sizeable number of Canadians have done so.



Q: In the past year, did you talk to your doctor or another health care provider about health information you found on the Internet?
(BASE: Those who have searched for health information online in past year; July 06, n=1191)

Few characterize health care providers' reactions as negative:

With only 1 in 10 characterizing their doctor or health care provider's reaction as negative, the majority received positive reactions.



Q: How did the doctor or other health care provider react when you talked with them about the health information you found on the Internet? Would you say their reaction was very positive, positive, neither positive nor negative, negative or very negative?
(BASE: Those who spoke to their health care providers about health information they found online; July 06, n=550)

Explanation of reaction

Per cent who report positive reaction

	2006
Doctors appreciated patients being well informed	41
Doctors said patients had found good information	28
Stimulated discussion	–
Other	24
DK/NR	1

Per cent who report negative reaction*

	2006
Doctors was not open to new ideas	35
Doctors viewed information as unreliable	–
Other	71
DK/NR	2

Q:

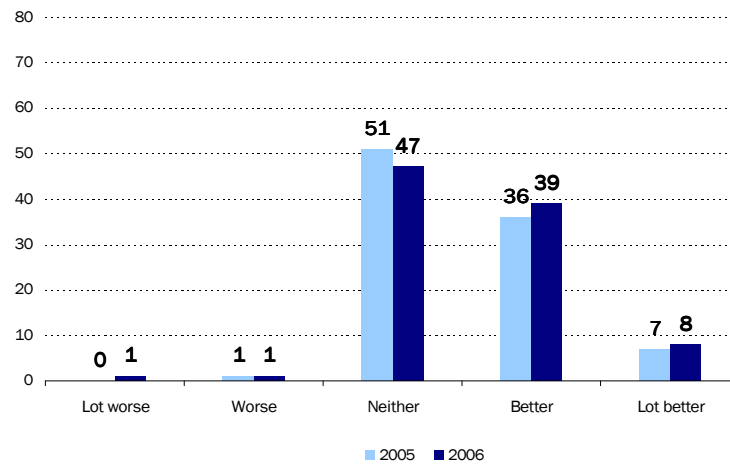
Why do you say that?

(BASE: Those who discussed health information found online with doctor/health care provider; July 06, positive reaction; n=841, negative reaction; n=52)

*Sample size is small

Discussing information found online is believed to improve healthcare:

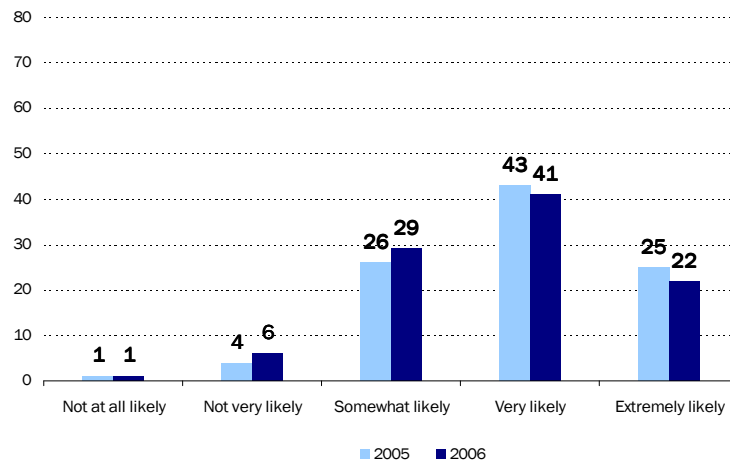
For many, discussing health information found online with their doctor is thought to result in improved healthcare.



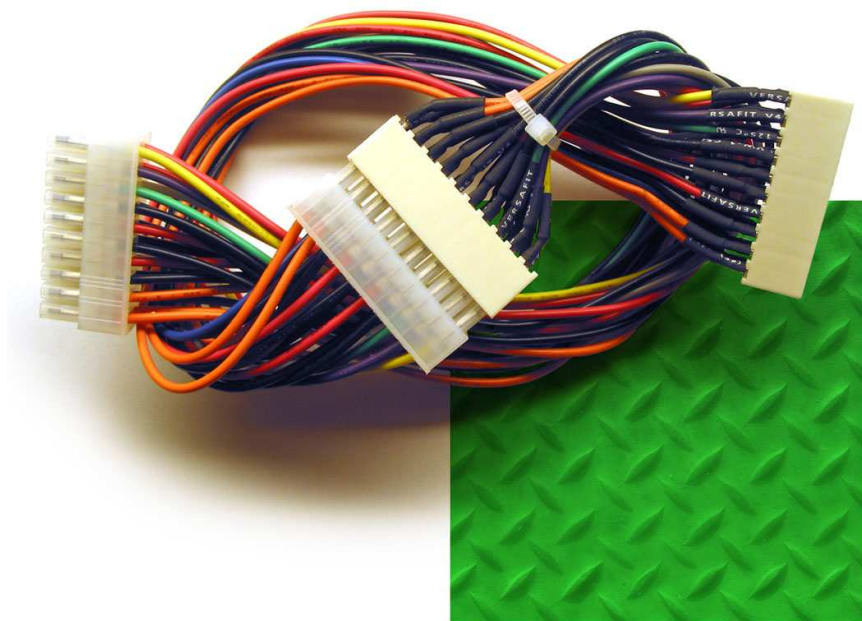
Q: Did talking with a doctor or other health care provider about the health information you found on the Internet make the quality of care you received better or worse? Was it a lot better, better, neither better nor worse, worse or a lot worse?
(BASE: Those who spoke to their healthcare providers about health information found online; July 06, n=550)

Positive reactions encourage informed patients:

Positive reactions encourage patients to continue using the Internet to search for health information and more informed dialogue with healthcare practitioners.



Q:
How likely is it that you will talk to a doctor or other health care provider about health information you found on the Internet in the future?
Would you say it is ...?
(BASE: Those who spoke to their healthcare providers about health information found online; July 06, n=550)



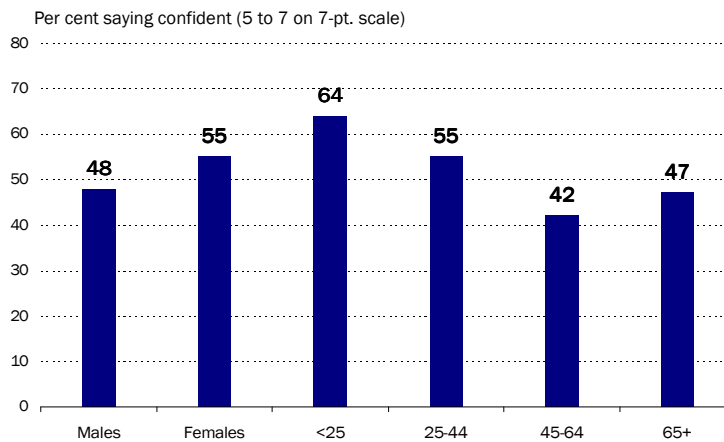
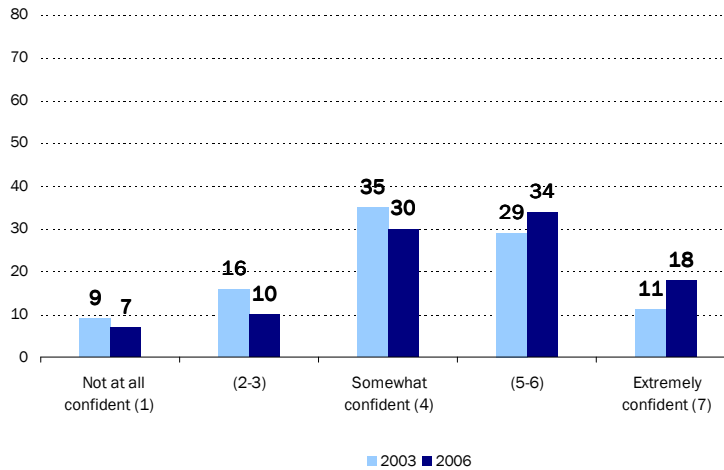
Privacy, security and health care

Highlights

- Canadians are increasingly confident that personal health information given to health care professionals is safe from unauthorized access. Only 4 per cent of all Canadians have withheld information over concerns of how it would be used.
- Internet users have become more comfortable with the notion of submitting personal health information online to medical professionals, with only 1 in 5 expressing low confidence.

Confidence in the protection of personal health information up slightly:

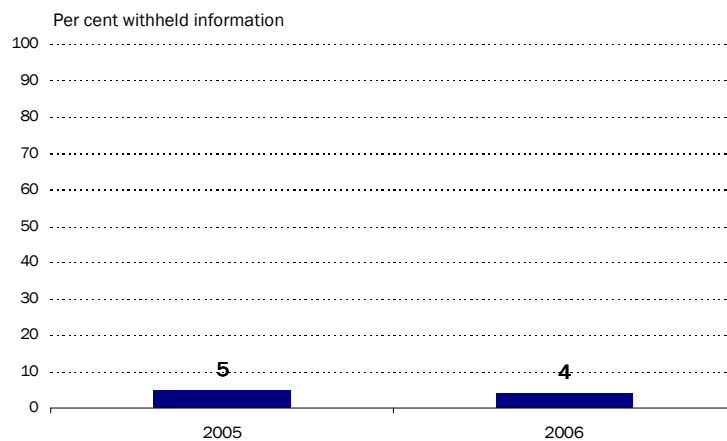
While a small but not insignificant minority remain concerned, there is a higher level of confidence in the security of personal health information. There is a sharp generational pattern with younger Canadians having greater confidence.



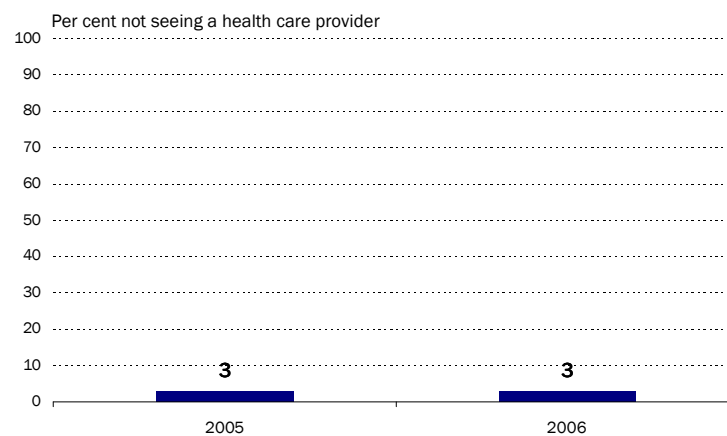
Q:
How confident are you that any personal health information you give to doctors or other health care professionals is safe and cannot be accessed by people who are not authorized to do so?
(BASE: All Canadians; July 06, n=1337)

Privacy concerns related to health information remain largely unchanged:

While it is only a small minority of Canadians who have withheld information from a health care provider or did not see one over privacy concerns, it is still very troubling all the same that this is happening at all.



Q: In the past year, have you withheld information from a health care provider because of concerns over who it might be shared with or how it might be used?
(BASE: All Canadians; Aug./Sept. 06 06, n=1586)

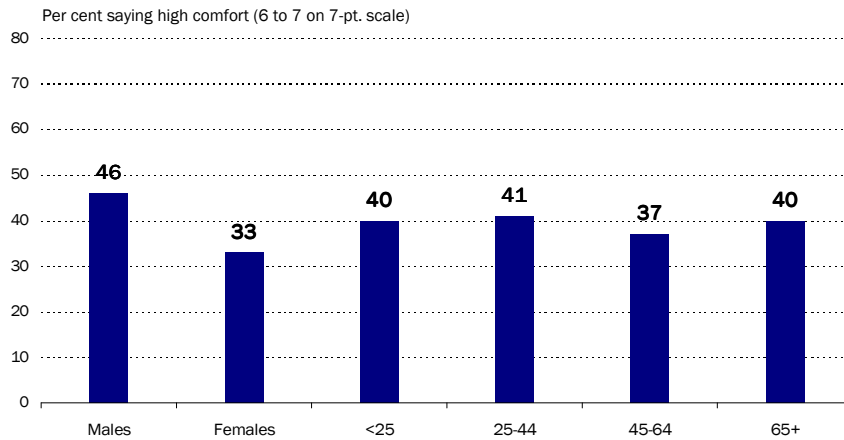
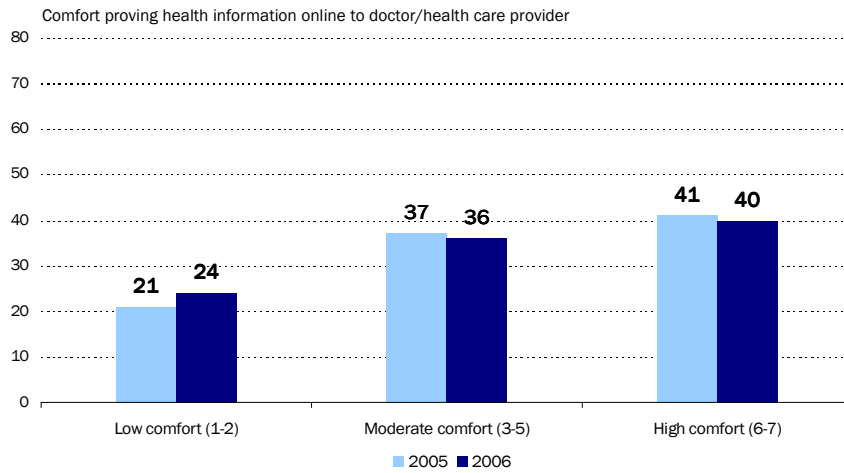


Q: In the past year, have you decided not to see a health care provider because of concerns over who your health information might be shared with or how it might be used?
(BASE: All Canadians; Aug./Sept. 06 06, n=1586)

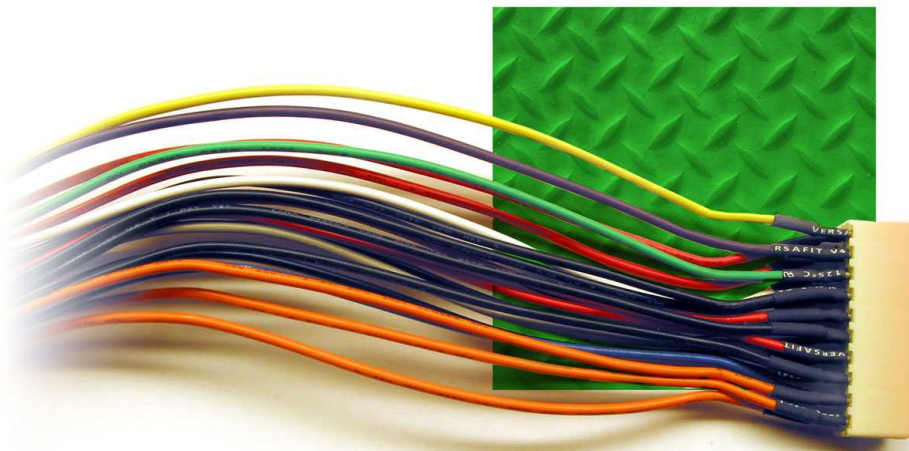
Greater comfort with the general notion of **submitting health information online to medical professionals is also indicative of increasing confidence** in the protection of personal health information in cyberspace.

Many users also report high comfort submitting health information online:

While lower than some other types of activities examined, a sizeable number of users report high levels of comfort providing their personal health information online to their doctor. Men report having greater comfort than women by 13 percentage points.



Q:
How comfortable would you be providing personal health information over the Internet to your doctor or another healthcare provider treating you?
(BASE: Internet users; July 06, n=848)



Electronic health records

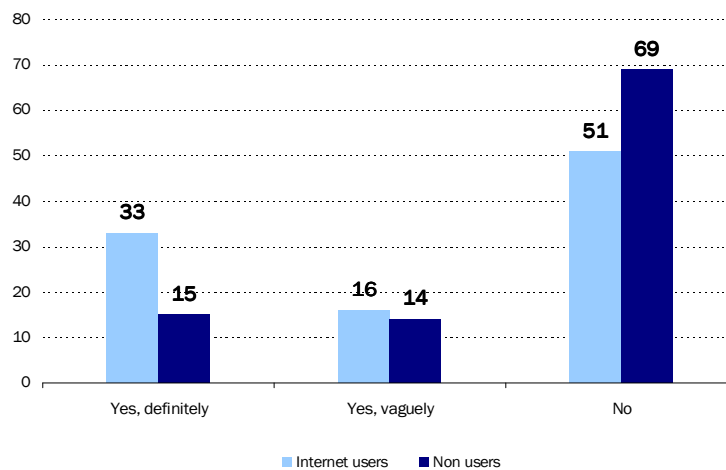
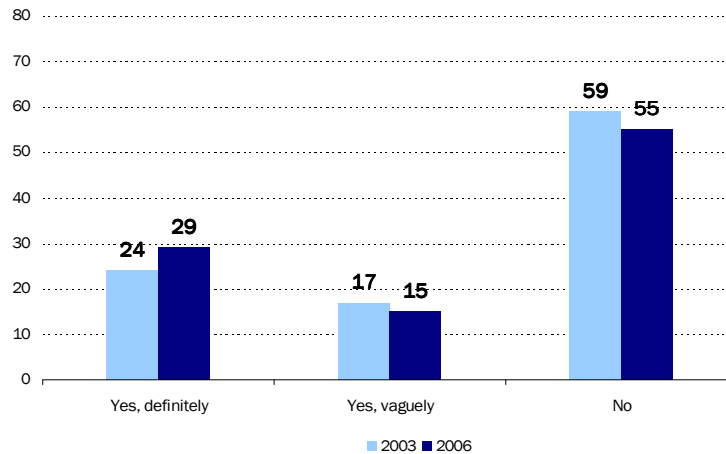
Highlights

- Low awareness of EHRs coupled with varying levels of comfort and support towards the EHR's concepts indicates there is a general need to raise Canadians' awareness.

The combination of low awareness of EHRs, varying levels of comfort with the overall concept and the potential of furthering support is indicative of the need to raise general awareness in Canada of EHRs.

General awareness of EHRs remains low:

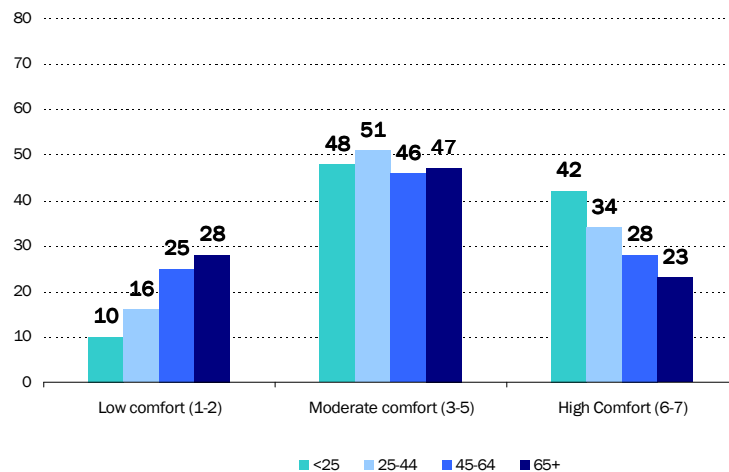
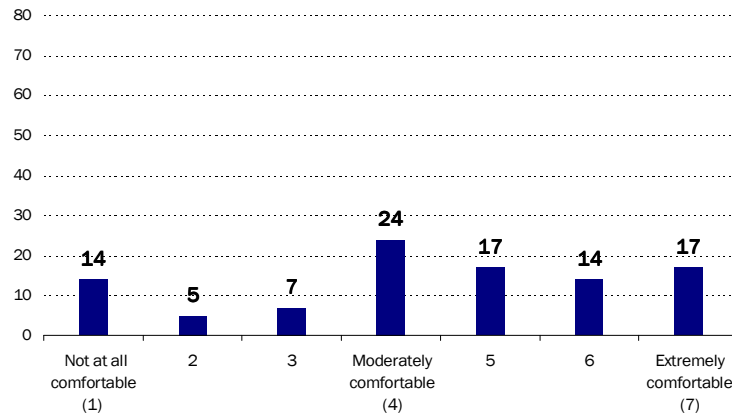
Although greater awareness of EHRs has increased slightly since 2005, the majority of Canadians remain largely unaware of this health information system. Internet users have greater awareness than non-Internet users.



Q:
Have you ever heard anything about so called electronic health records?
(BASE: All Canadians; July 06, n=1137)

Levels of comfort pertaining to EHRs vary considerably:

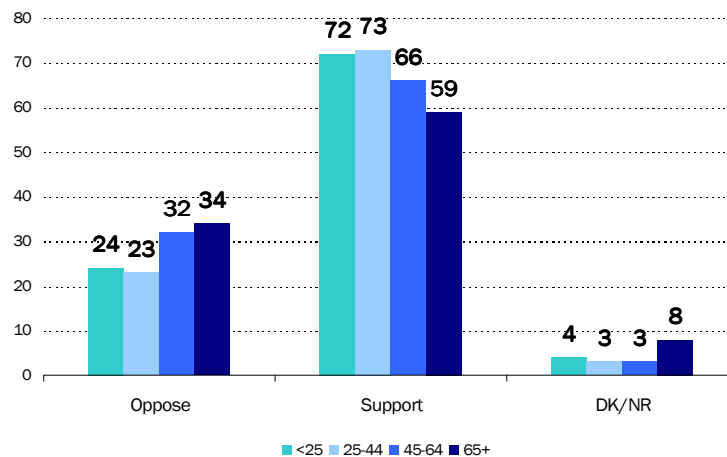
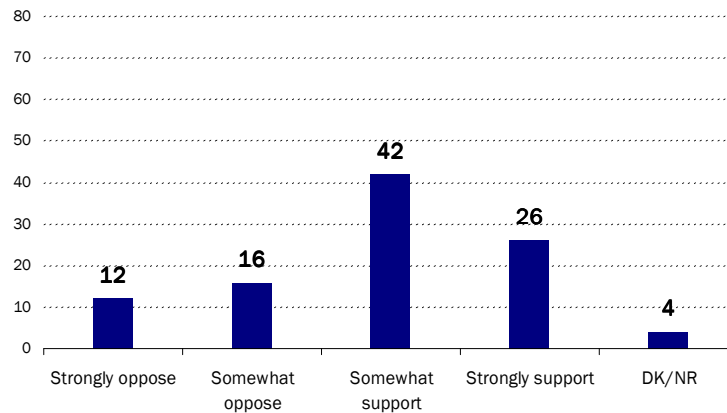
As a result of general awareness remaining low, comfort levels surrounding EHRs are scattered. There are also strong generational differences, with comfort declining among older Canadians.



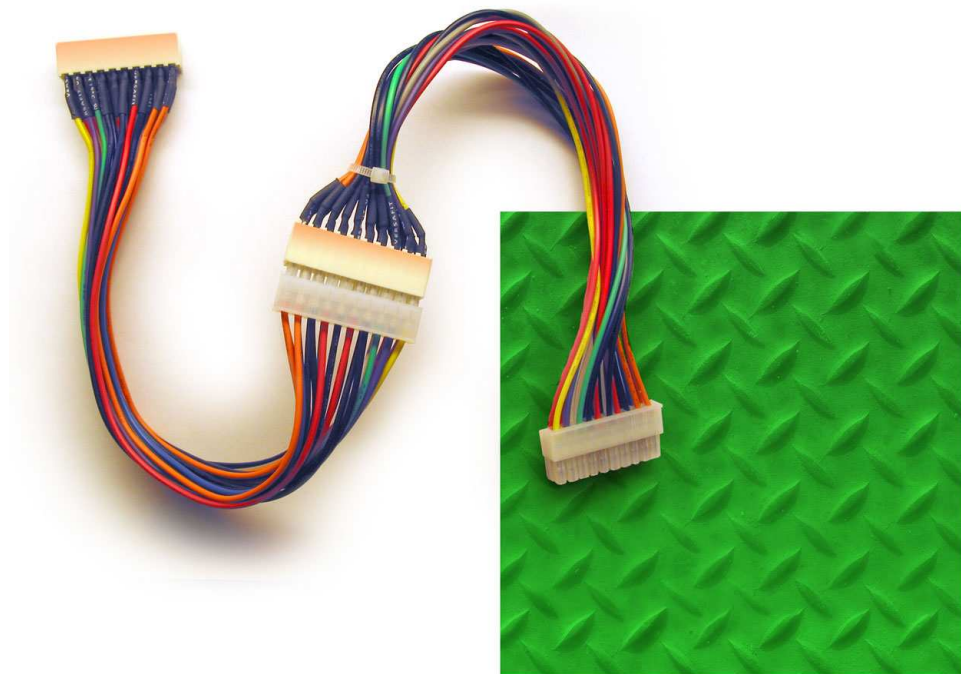
Q:
Overall, how comfortable are you with the idea of electronic health records?
(BASE: All Canadians; July 06, n=1137)

Strong majority lean toward supporting EHRs:

While a strong majority of Canadians support the development of EHRs, there is still about one in four opposing. There are some generational differences, although the majority of all age segments support the concept.



Q: Overall, do you strongly support, somewhat support, somewhat oppose or strongly oppose the development of electronic health records?
(BASE: All Canadians; July 06, n=1137)



Appendix A: Key Internet Trends

Recent Internet usage

% of Canadians using Internet in past 3 months

	1997	1999	2000	2001	2002	2003	2005	2006
All Canadians	37	51	60	68	68	74	78	78
Gender								
Males	44	56	64	73	73	76	79	80
Females	31	45	57	65	63	72	76	76
Age								
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
Household Income								
<\$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
Region								
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
Location								
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
All Canadians	28	44	51	59	62	67	72	75
Gender								
Males	33	50	56	62	66	70	74	77
Females	23	39	47	50	58	64	70	72
Age								
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
Household Income								
<\$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
Region								
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
Location								
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
All Canadians	19	25	29	34	43	45
Gender						
Males	23	30	34	39	48	49
Females	14	20	23	29	39	41
Age						
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
Household Income						
<\$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
Region						
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
Location						
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
All Canadians	16	24	27	32	43	46
Gender						
Males	21	27	28	35	46	48
Females	12	21	25	28	40	44
Age						
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
Household Income						
<\$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
Region						
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
Location						
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
All Canadians	53	53	55	55	64	63
Gender						
Males	56	60	57	57	67	66
Females	49	47	51	53	61	61
Age						
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
Household Income						
<\$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
Region						
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
Location						
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

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 agreed 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 the end of October 2006.
- Wave 2 results were statistically weighted by age, gender and Internet usage.
- Findings from questions posed on Wave 2 may be considered accurate within +/- 2.5 percentage points, 19 times out of 20.