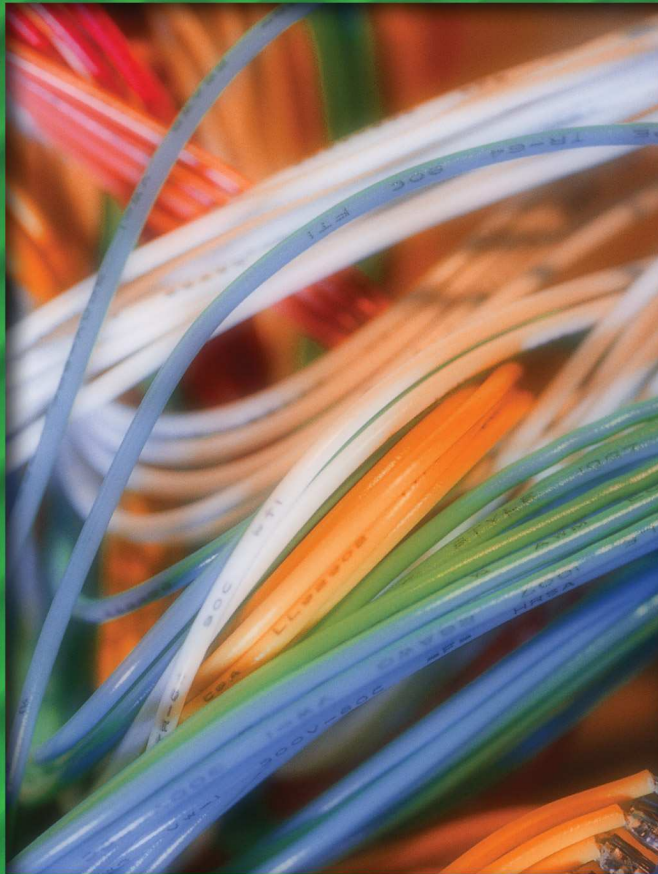


2006 • 2007

PART OF THE **INFORMATION HIGHWAY** STUDY



EKOS

Delivering Services to Ontario

Delivering Services to Ontario

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 have been adjusting to its significance and impact in the realm of service delivery. The Government of Ontario 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.

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 a way that is as cost effective and timely as possible and in a manner 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; similarities that often complement one another. For example, while Ontarians 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 Ontario, and to provide decision makers in this area with a sense of the current trends, expectations and preferences of Ontarians' interactions with the government and how they are changing.

Overview

The Ontario service delivery environment has undergone some dramatic changes in the past decade. As improvements have been made to pre-existing methods of contact and new forms of communication have been established with many of the recent technological advancements made in the past decade, Ontarians' options for receiving services has improved dramatically. Despite the progress made in offering citizens a variety of methods to interact with, there is still a considerable amount of work that needs to be done.

The broad service delivery environment

Service delivery matters:

Service interactions are often the only form of personal contact citizens have with the 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.

Positive outlook:

Ontarians 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 decrease.

The privacy and security shift:

Back in 2001, there were more citizens expecting deterioration than those expecting improvements. Today, there has been a reversal with more citizens expecting improvements; a trend also illustrated by the

fact that almost 1 in 2 today believe governments collect only the information they need to deliver services to citizens.

Recent contact with the Ontario government

The Internet as the main method of contact:

Despite movement towards the electronic channel slowing down or stalling across much of Canada, the Internet has overtaken the telephone for the first time as the main method of contact for Ontarians. With preferences demonstrating a strong interest in the Internet and the majority of its users expressing an overwhelmingly positive satisfaction rate, it is not surprising to see a majority of Ontarians accepting the Internet as a main method of contact in their recent interactions with the provincial government.

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 citizens 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.

Methods of contact vary according to activity:

Although Ontarians are most likely to make use of the Internet in a majority of their contact, there continue to be a variety of activities where citizens prefer to employ more direct and familiar methods. For example, although there exist methods to renew vehicle registration or obtain a lost document online, citizens continue to opt for the in-person method.

Channel preferences

Slight lean towards the Internet as a channel preference:

A common trend among all citizens is an increasing preference to use the Internet in a majority of government interactions. This trend is especially pronounced in the amount of Ontarians who state an overall preference in using the Internet for both finding information about government programs and services and receiving specific answers to federal government questions. As a result, Ontarians, much like the rest of Canada, believe that the majority of their future contact with the government will be done online.

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 question. When it comes to interactions that are more sensitive in nature, Ontarians express a preference for in-person interaction.

Online channels

Concerns with the Internet:

Although Ontarians believe the Internet is an effective manner for governments to communicate with its citizens and has made finding information much easier, there still remains a significant portion of Ontarians that express discomfort with doing some government interactions online. Security and personal privacy are of the highest concern as Canadians express some reluctance in conducting financial transactions and providing personal information.

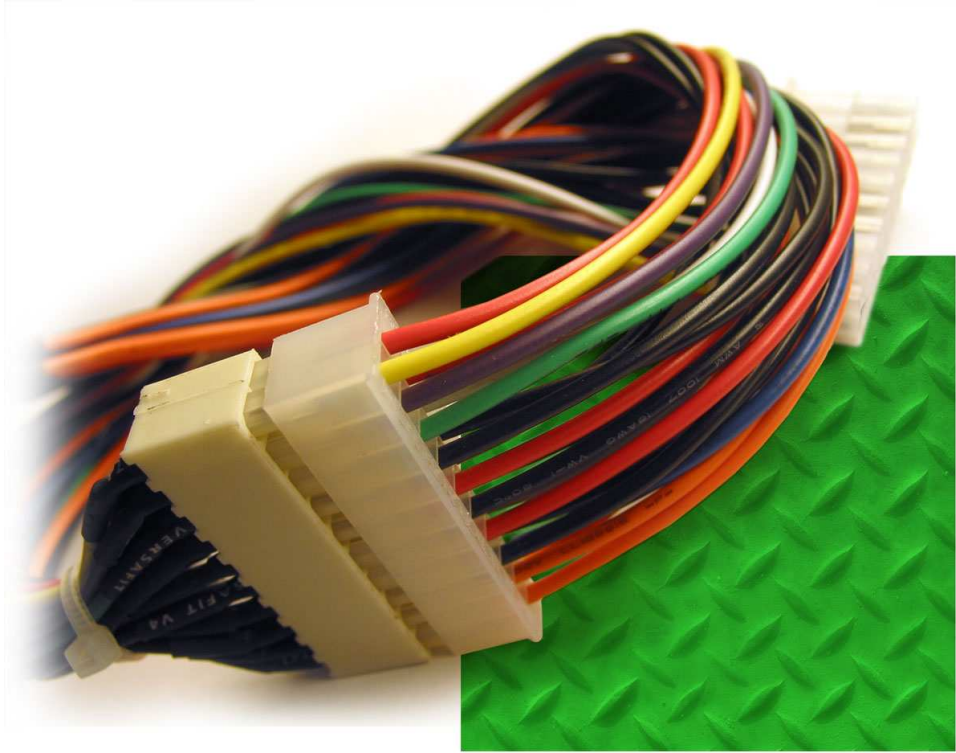
Online channels — direct use and intermediaries:

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 — fewer than 1 in 4 — not having 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 Ontarians 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 Ontarians 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

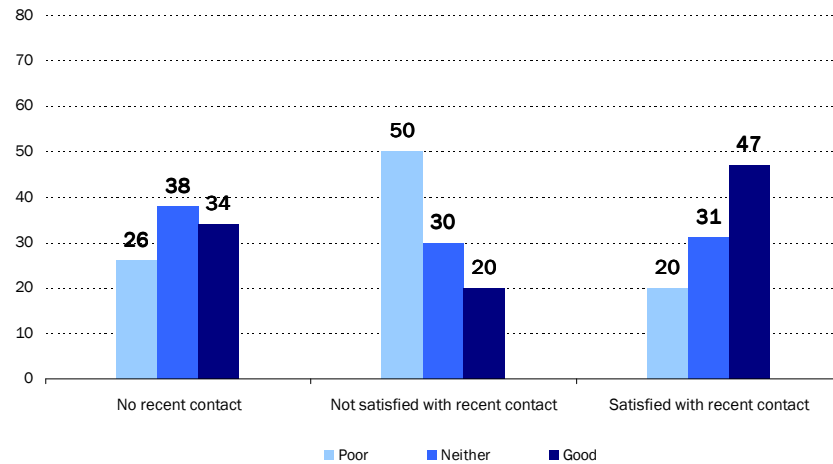
- Service delivery influences broader perceptions, including the Canadians public's overall outlook on the broad performance of the government. Canadians who are satisfied with recent interactions are far more likely to rate the government's overall performance positively than those without any contact or those who are not satisfied with their recent contact.
- While Ontarians and 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 Ontarians and Canadians expecting improvements far outnumbering those expecting deterioration.

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 Canadians' views***.

*While this line of questioning relates to the federal government, it is nevertheless worthwhile to note the strong relationship between perceptions with overall performance and the outcomes of recent service interactions with the federal government.

Service delivery influences broader perceptions:

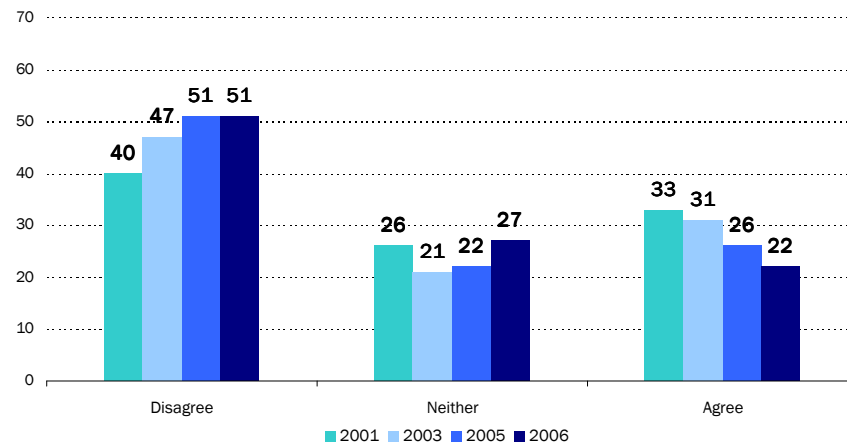
Canadians who are satisfied with recent interactions are far more likely to rate the government's overall performance positively than those without any contact and those who are not satisfied with their recent contact.



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:

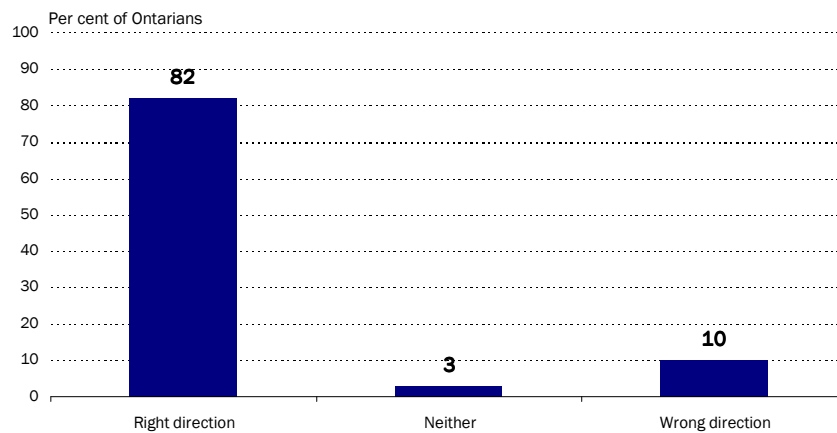
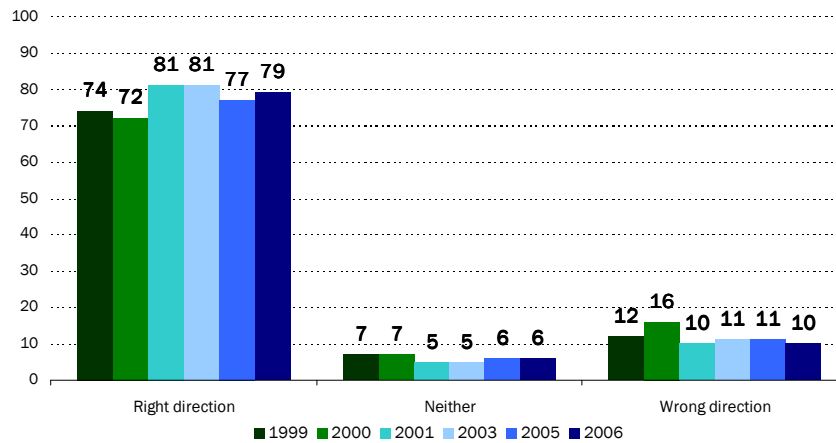
While it is clear that there is a strong linkage between service delivery and broad perceptions of government, it is important to take into account the current efforts by governments across the country to modernize service delivery are occurring against a backdrop of declining trust.



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 of technology is a move in the right direction, reflecting in large part the high levels of comfort with technology in general.



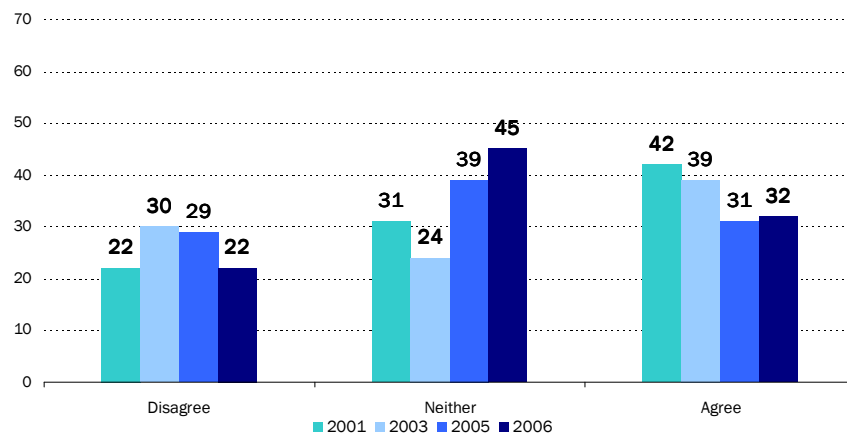
Q:

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/All Ontarians; July 06, n=1124/393)

Mixed judgments on government implementation of new technology:

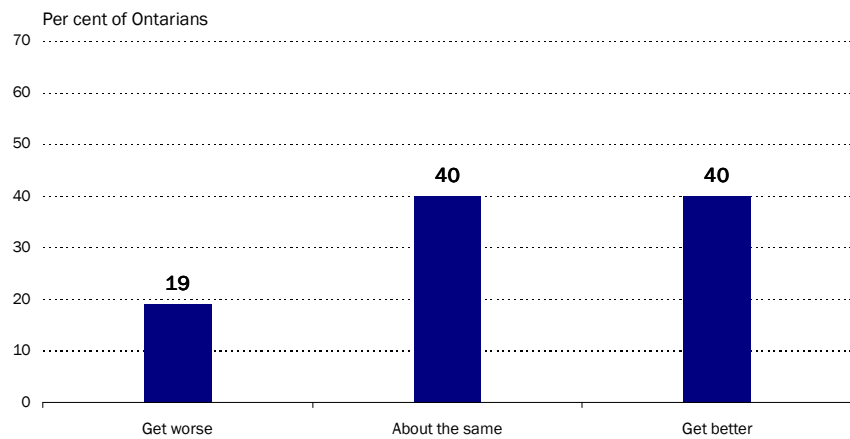
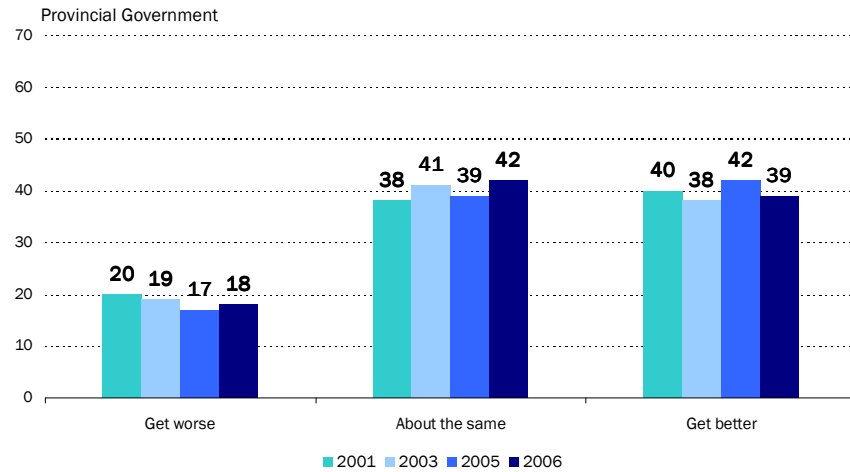
Despite positive views on the governments' greater emphasis on technology, Canadians remain divided on whether governments are at the forefront when it comes to implementing new technology.



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:

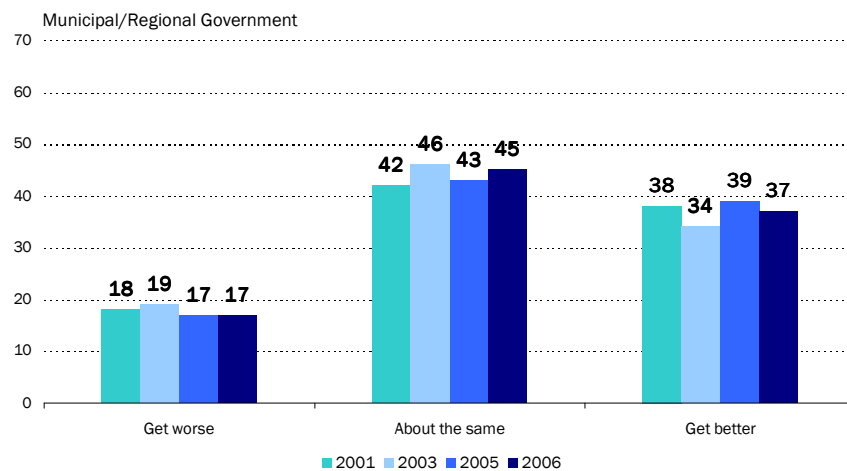
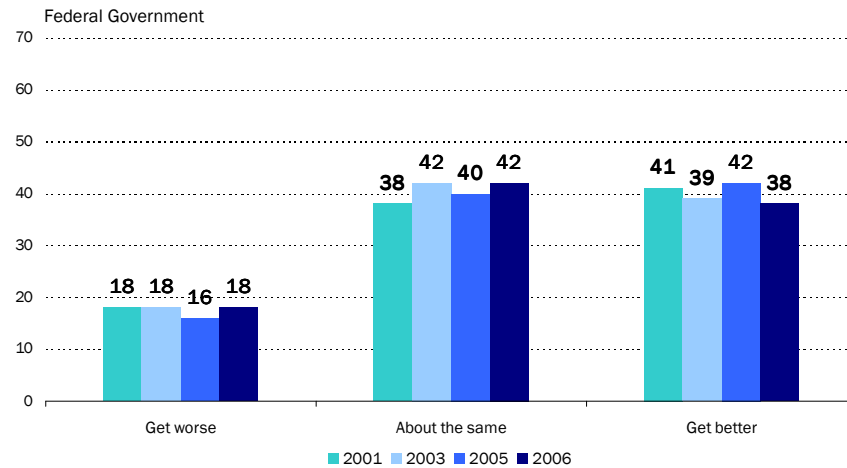
Canadians hold a decidedly positive outlook in relation to the service they will get. Although the largest proportion expect service from governments will stay relatively the same, those who predict an improvement outnumber those expecting a weakening by a 2 to 1 margin.



Q:
Would you say that service from different levels of government will be better or worse five years from now?
(BASE: All Canadians/All Ontarians; Aug./Sept. 06 n=1586/635)

Strong lean towards seeing service delivery getting better:

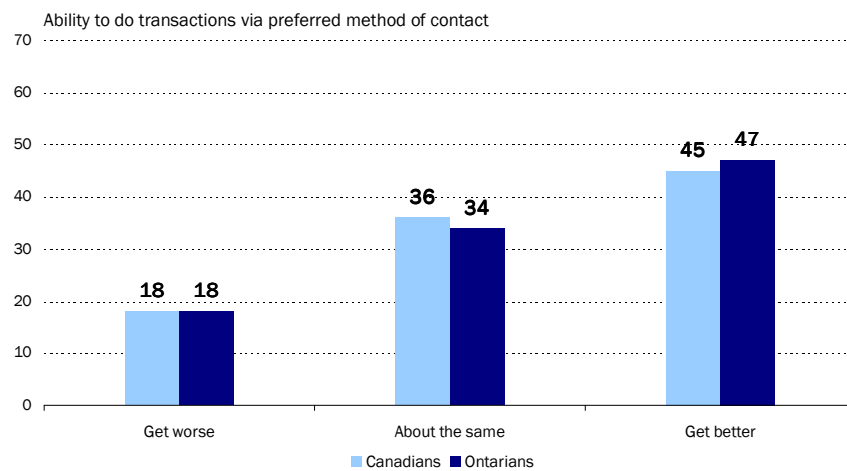
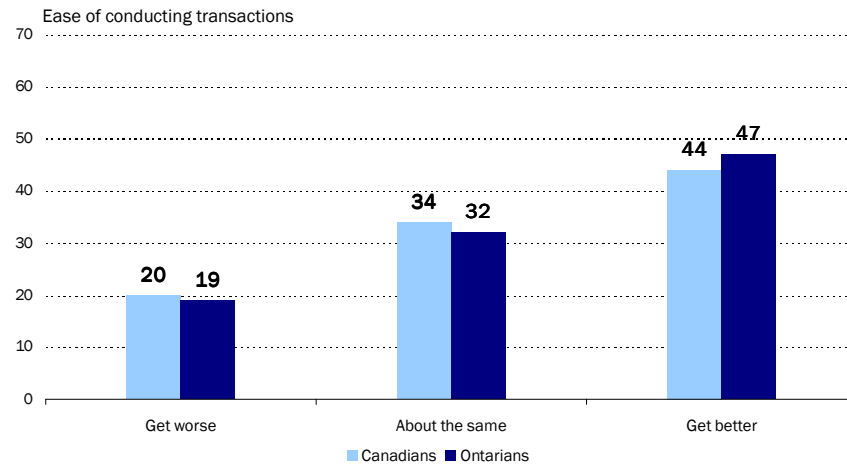
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Q: Would you say that service from different levels of government will be better or worse five years from now?
(BASE: All Canadians; Aug./Sept. 06 n=1586)

Positive expectations in relation to ease and choice:

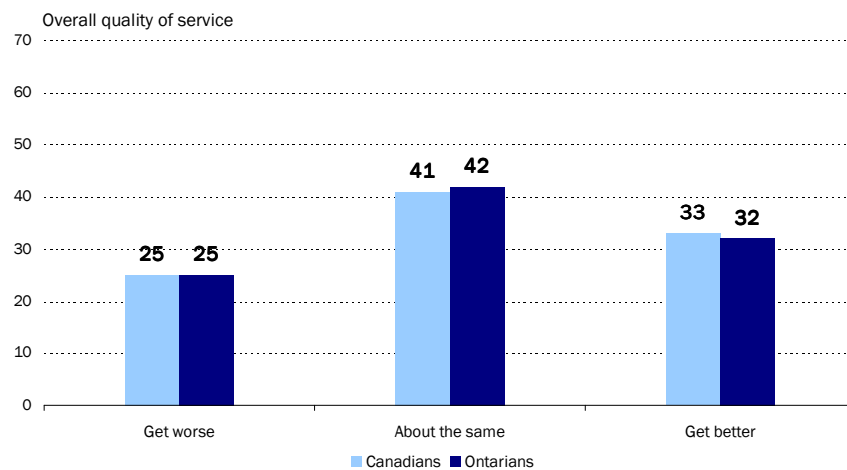
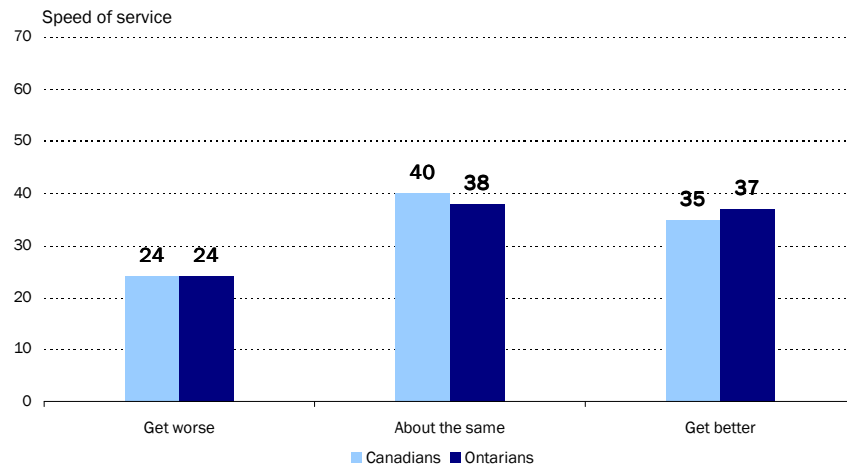
When it comes to ease of conducting transactions and the choice in channels, Canadians are almost twice as likely to see things improving in the future as those expecting deteriorations.



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/All Ontarians; Aug./Sept. 06, n=1586/635)

Quality and speed remain essential factors in improving service delivery:

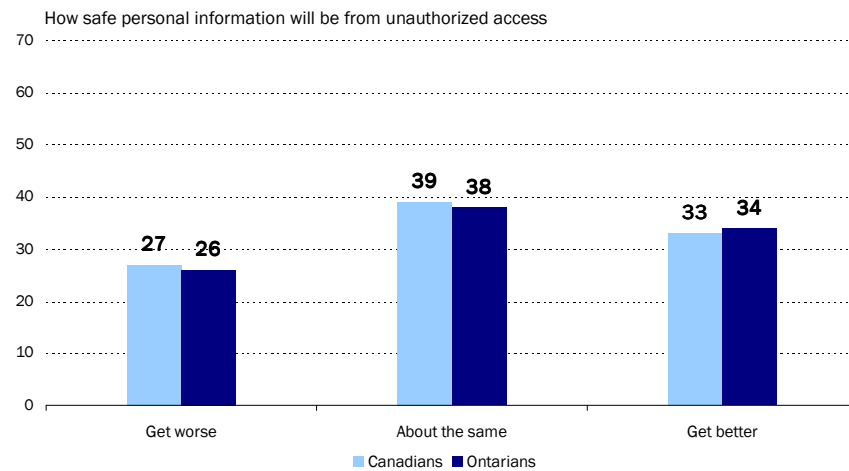
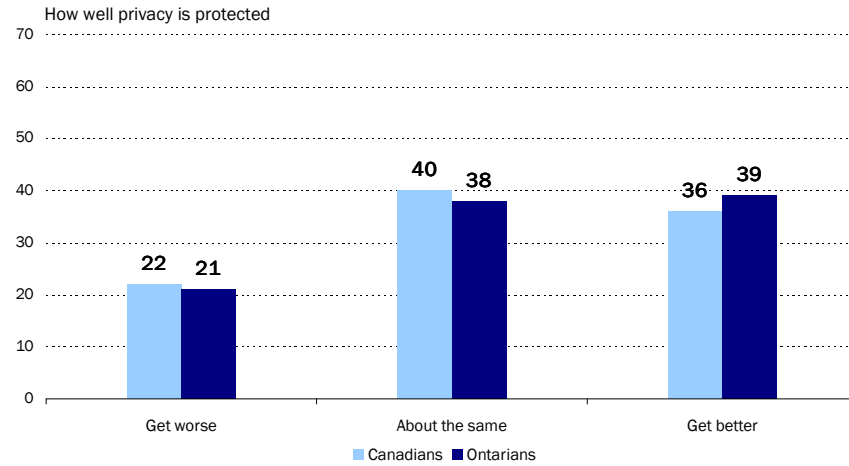
Canadians still remain optimistic, albeit not as much on ease and choice, in expecting improvements to speed and overall quality of service.



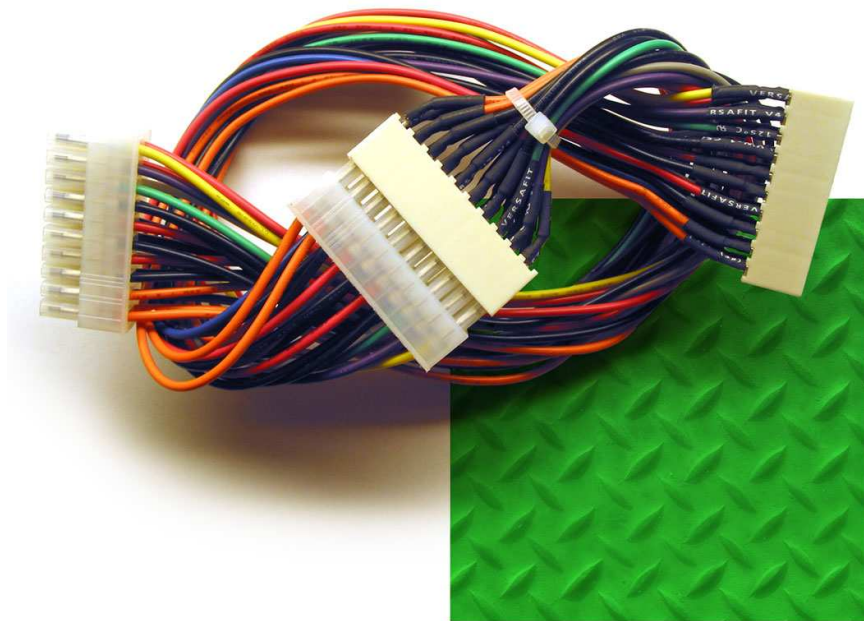
Q: Thinking about all levels of government, would you say that service will be better or worse in . . . five years from now?
(BASE: All Canadians/All Ontarians; Aug./Sept. 06, n=1586/635)

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/All Ontarians; Aug./Sept. 06, n=1586/635)



Recent contact with the Ontario government

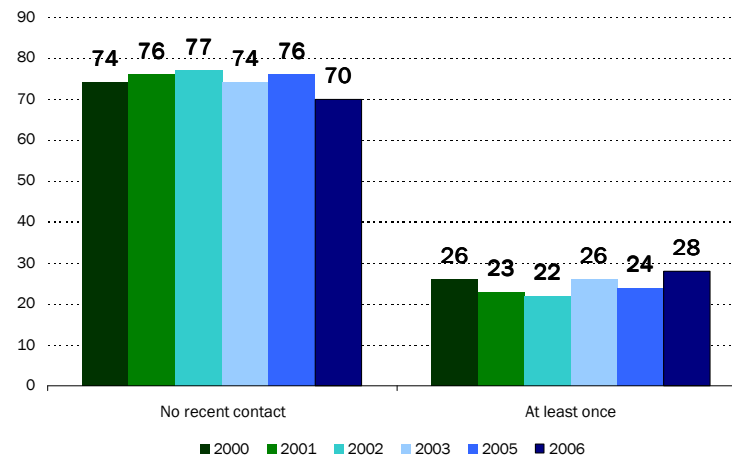
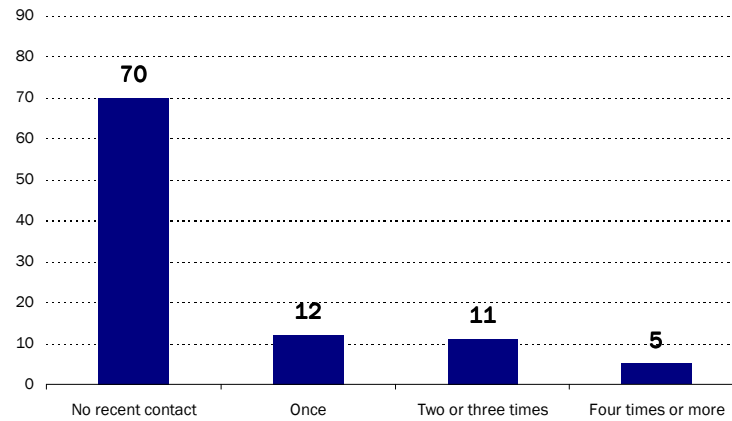
Highlights

- Despite significant changes to the service delivery environment, Ontarians continue to contact the provincial government for personal reasons at a rate similar to previous years.
- For the first time since tracking, Ontarians are using e-channels as their main method of contact in their recent interactions with the provincial government. Despite this new trend, the telephone continues to be an established channel that many Ontarians rely on for the majority of their government interaction.
- 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. Close to 2 in 5 Ontarians with recent contact report using multiple channels, a pattern that has remained relatively constant.
- Although Ontarians express similar levels of satisfaction to that of previous years, there continues to be distinct division in satisfaction levels between the various methods of contact. Those that have preformed their interaction through either the in-person or online method are most likely to express a higher level of satisfaction than those who use the telephone.
- In the past year Ontarians have increasingly made use of the online channel for a variety of activities. In fact, the Internet has increasingly led to declining numbers in both mail and telephone users. Despite overall improvements made to the online channel, Ontarians still use the in-person method to register or renew a license.

Although overall contact with the provincial government has shown little fluctuation, **the Internet has supplanted the telephone as the main method of contact for Ontarians in their recent interactions.** Internet users also tend to report the highest levels of satisfaction among all channel users. That said, other methods of contact still play an integral role in many interactions.

Contact with the provincial government remains stable:

A sizeable number of Ontarians continue to have contact their provincial government. In fact, almost 3 in 10 reported having had contact in the past three months.



Q: Including in-person, mail, telephone contact and by e-mail/Internet, how many times have you had contact with your provincial government (for a service or information) for personal, rather than work related reasons over the last three months?
(BASE: All Ontarians; July 06, n=1723)

Reason for last contact with provincial government

(Per cent)

	2006	METHOD OF CONTACT			
		Telephone	Mail	In-person	Internet/Email
Health related	9	11	10	7	14
Obtaining information	8	8	3	6	27
Renew driver's license	7	2	11	27	5
Apply for health card	5	6	4	10	4
Apply for birth/death certificate	5	5	–	2	15
Provincial sales/income tax	3	3	7	–	5
Update information	2	2	1	–	5
Job opportunity	2	1	–	–	6
Education-related	2	–	4	1	3
Labour issues	1	1	0	0	5
Apply for driver's license	1	3	–	1	1
Provide information	1	1	2	3	1
Hunting license	1	1	1	–	1
Child care	1	2	2	2	1
Other	27	19	14	17	45
DK/NR	6	8	9	–	8

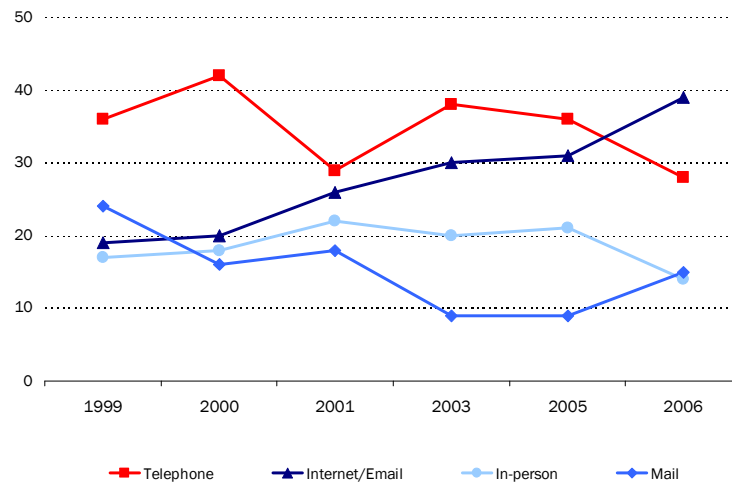
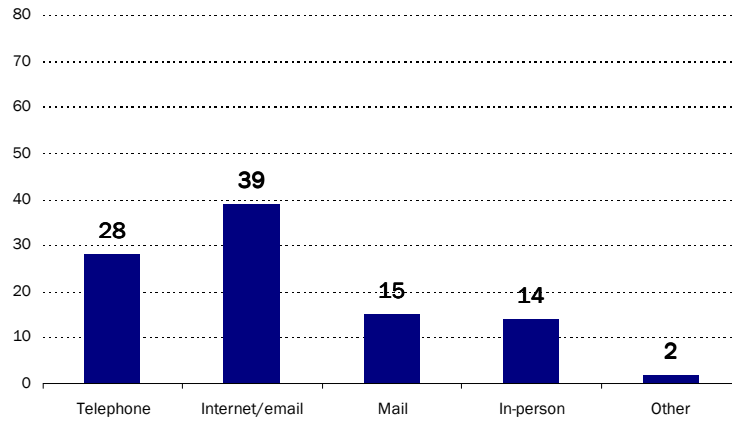
Q:

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

(BASE: Ontarians with recent contact with the provincial government; July 06, n=485)

E-channels have now surpassed the telephone channel:

For the first time, e-channels have overtaken the telephone as the most commonly used service channel for Ontarians in their most recent contact with the provincial government.

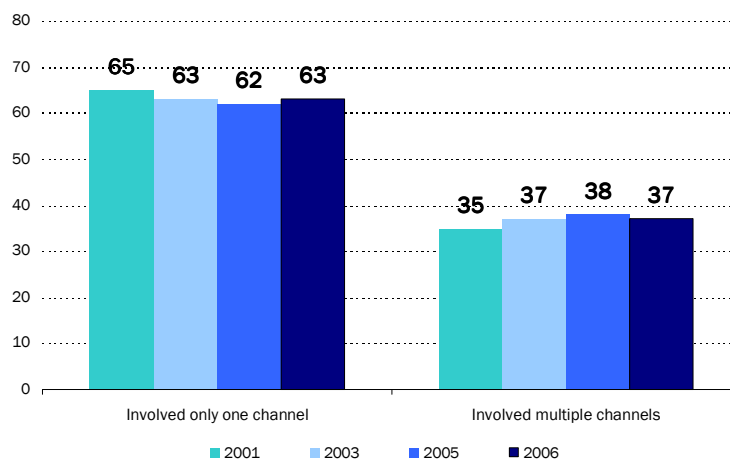


Q:
Thinking now of your most recent contact with your provincial government, what was the method of contact?
(BASE: Ontarians with recent contact with provincial government; July 06, n=493)

A variety of factors are responsible as to why a significant amount of Ontarians who contact the government used more than one channel. Led by being told to use an other method of contact, the reasons for multiple channels are also likely to involve complexities in the method of interaction, and various inefficiencies.

Multiple channels still key part of the environment:

More than 4 in 10 Ontarians who have had recent government contact used multiple channels in their interactions.

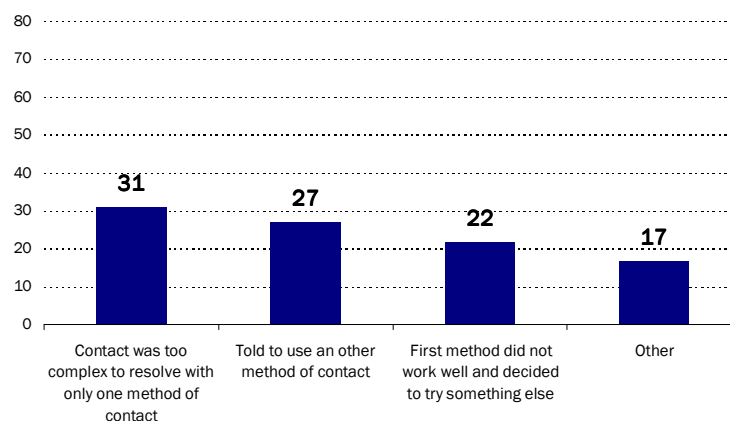


Q:

Thinking again about your most recent contact, did it involve any other methods of contact other than ...?
(BASE: Ontarians with recent contact with provincial government; July 06, n=478)

Various reasons responsible for multiple channel usage:

The reasons why some Ontarians are using multiple service channels vary considerably including, complexity, staff direction, and inefficiencies.

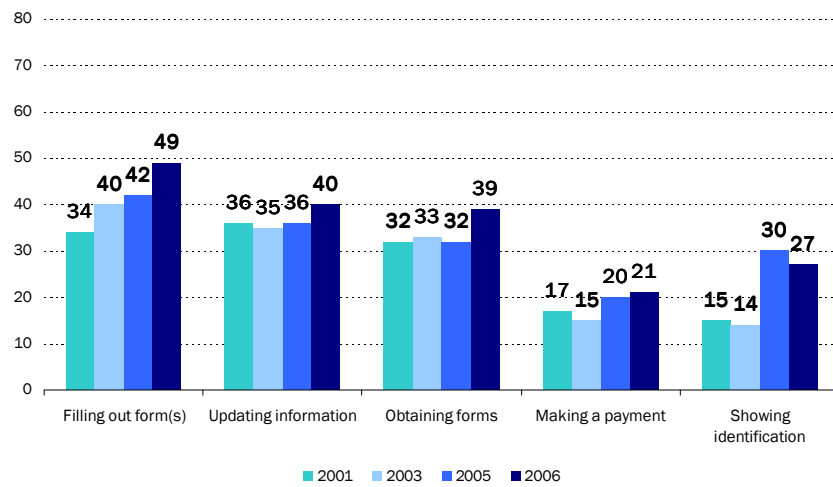


Q:

And which of the following BEST describes why you used more than one method of contact?
(BASE: Ontarians who used more than one method of contact with provincial government; July 06, n=124)

Recent interactions continue to involve a wide range of activities:

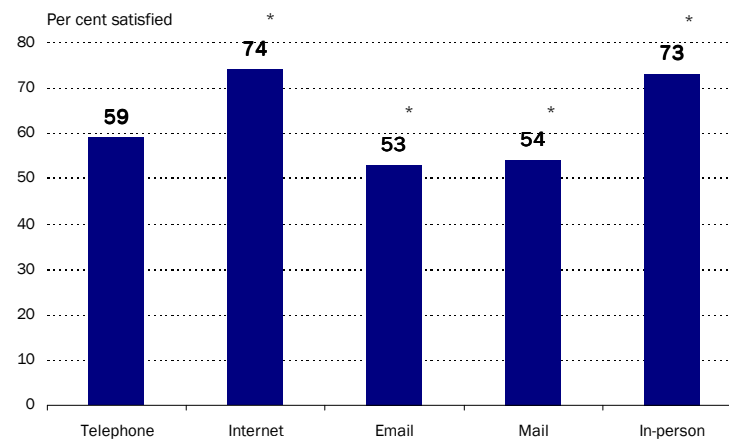
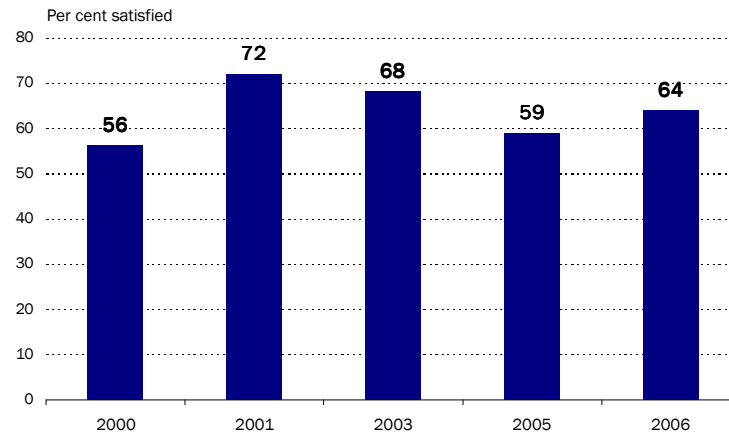
Although the majority of government interactions involve filling out forms, Ontarians are increasingly involved in a wide range of other activities.



Q:
Did your most recent contact involve any of the following activities?
(BASE: Ontarians with recent contact with their provincial government; July 06 n=291)

Satisfaction with government interactions remain stable:

As almost 2 in 3 Ontarians report being satisfied with their recent contact, highest satisfaction was reported among internet users and those who interacted in-person.



Q:

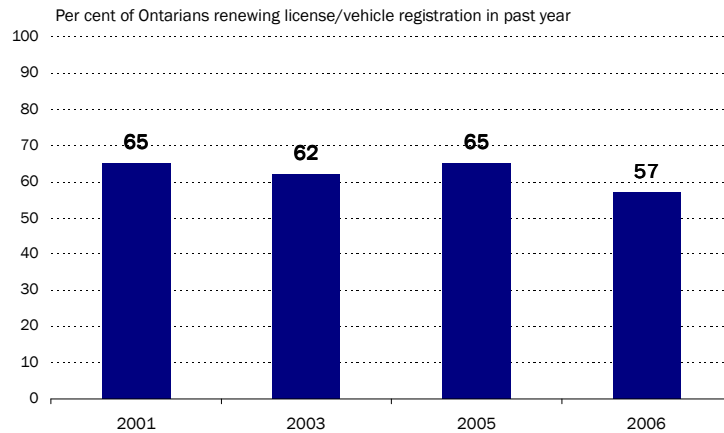
Could you please rate your overall satisfaction with the service or response you received from the provincial government during your most recent contact.

(BASE: Ontarians with recent contact with provincial government; July 06, n=483 *Differences statistically significant from overall average)

In the past year, Ontarians have increasingly made use of the online channel for a variety of activities. In fact, **the Internet has increasingly led to declining numbers in both mail and telephone users.** Despite overall improvements made to the online channel, Ontarians still use the in-person method to register or renew a license.

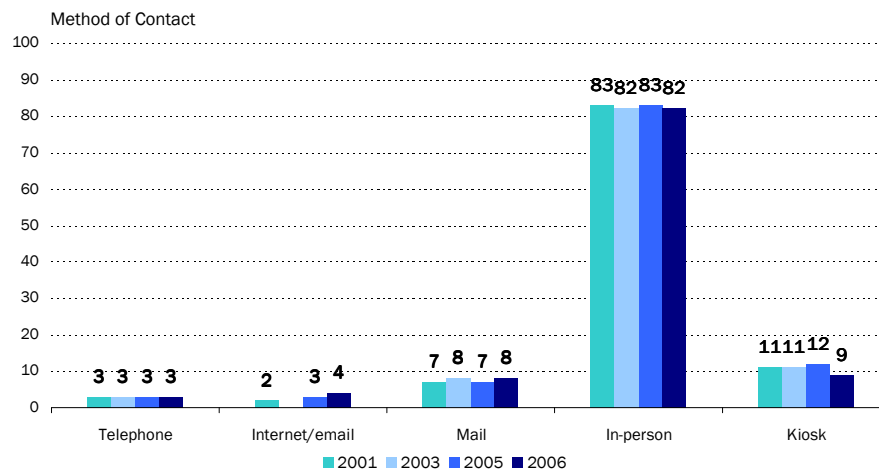
License renewal remains major form of government contact:

With 4 in 5 Ontarians having renewed their license in the past year, an overwhelming majority do so in person.



Q:

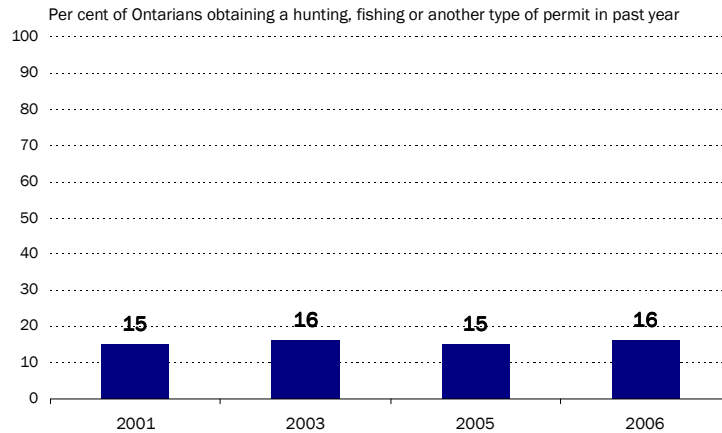
In the past year, have you renewed a driver's license or vehicle registration?
(BASE: All Ontarians; July 06, n=861)



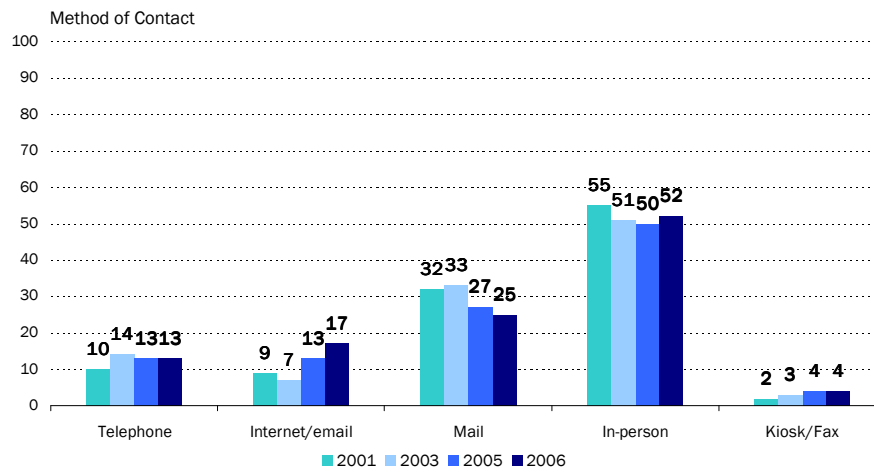
Q:

And what method(s) of contact did it involve?
(BASE: Those who renewed; July 06, n=507)

Majority of Ontarians obtain hunting and fishing licenses in person:
 Despite being the third most common method in obtaining a license, the Internet is increasingly becoming a main method of contact.



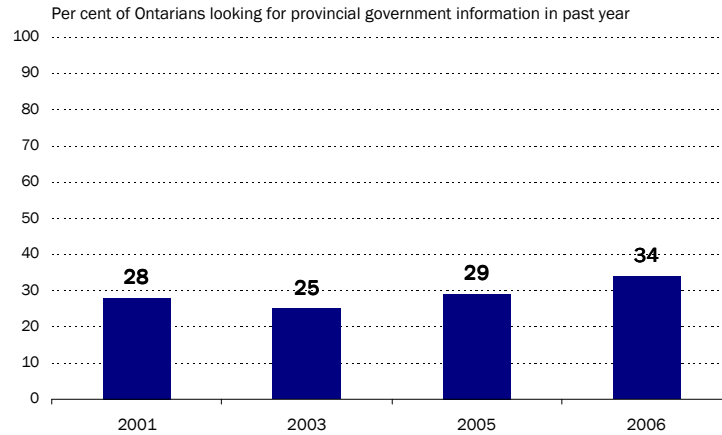
Q:
 In the past year, have you obtained a hunting, fishing or another type of permit?
 (BASE: All Ontarians; July 06, n=1723)



Q:
 And what method(s) of contact did it involve?
 (BASE: Those obtaining permits; July 06, n=255)

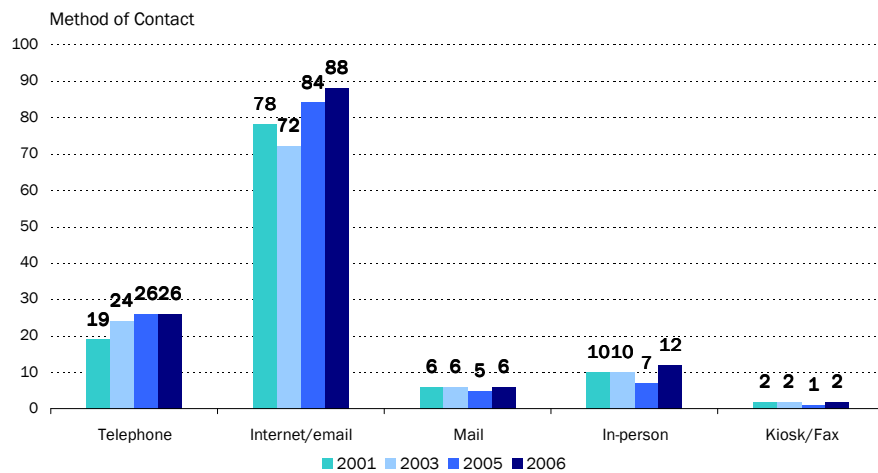
Almost 1 in 3 Ontarians have looked for government information:

Ontarians are increasingly using the Internet to look for government information on programs and services. In fact, the Internet is by far the most important channel for Ontarians.



Q:

In the past year, have you looked for information on a provincial government program or service?
(BASE: All Ontarians; July 06, n=862)

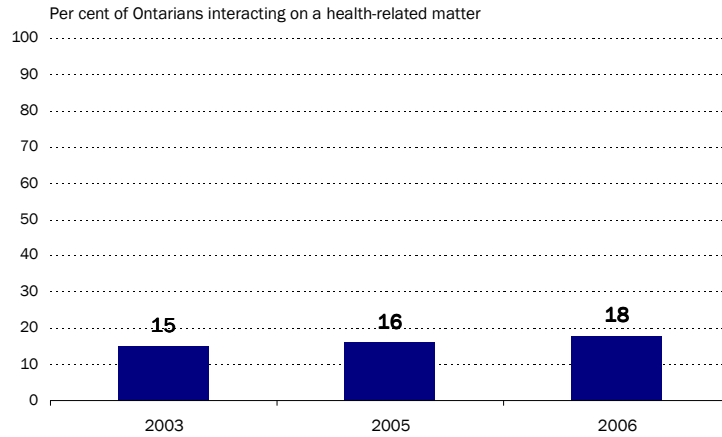


Q:

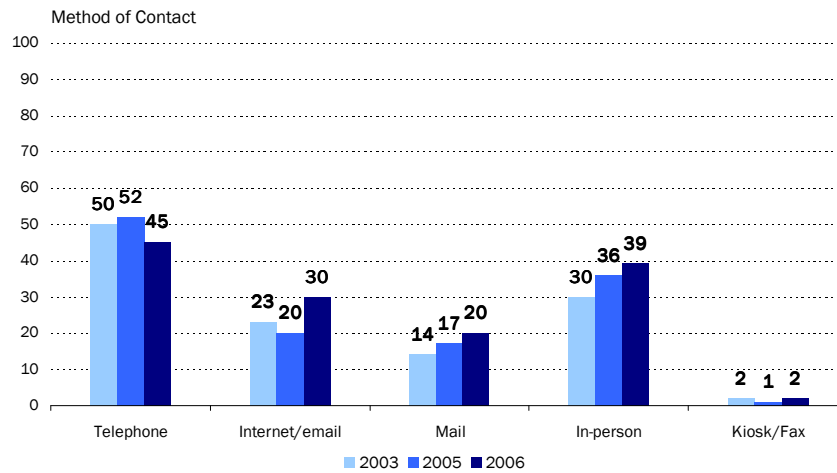
And what method(s) of contact did it involve?
(BASE: Those who looked for information; July 06, n=283)

Health-related interactions require multiple channels:

Of the 1 in 5 Ontarians that has interacted with the government on a health related matter, an increasing amount have used the Internet to facilitate contact.



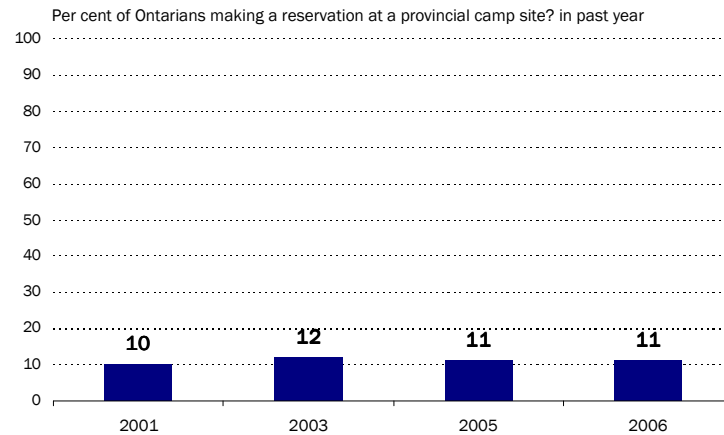
Q:
In the past year, have you interacted with the provincial government on a health-related matter (not including going to hospital, doctor's office)?
(BASE: All Ontarians; July 06, n=1723)



Q:
And what method(s) of contact did it involve?
(BASE: Those who interacted; July 06, n=297)

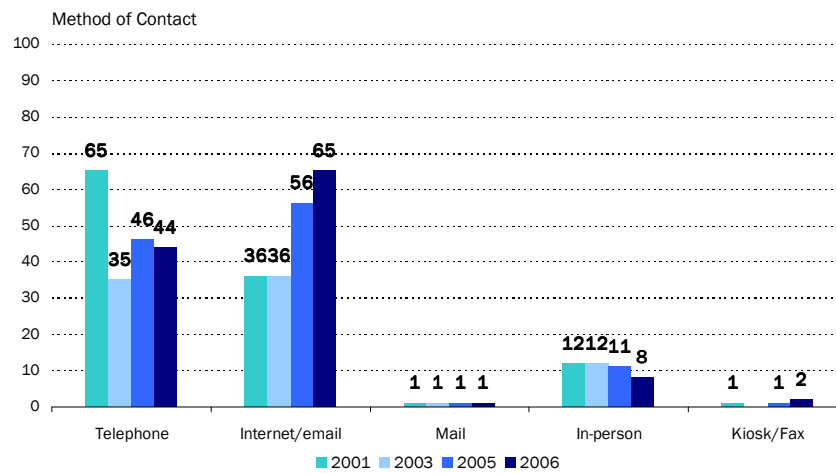
Provincial camp sites continue to rely on the internet for reservations:

Over the last five years, the Internet has replaced the telephone as the main method of making a reservation at a provincial camp site.



Q:

In the past year, have you made a reservation at a provincial camp site?
(BASE: All Ontarians; July 06, n=1723)

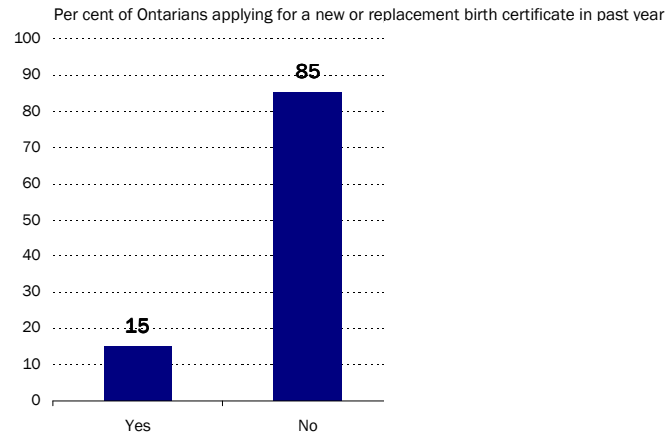


Q:

And what method(s) of contact did it involve?
(BASE: Those who made reservations; July 06, n=161)

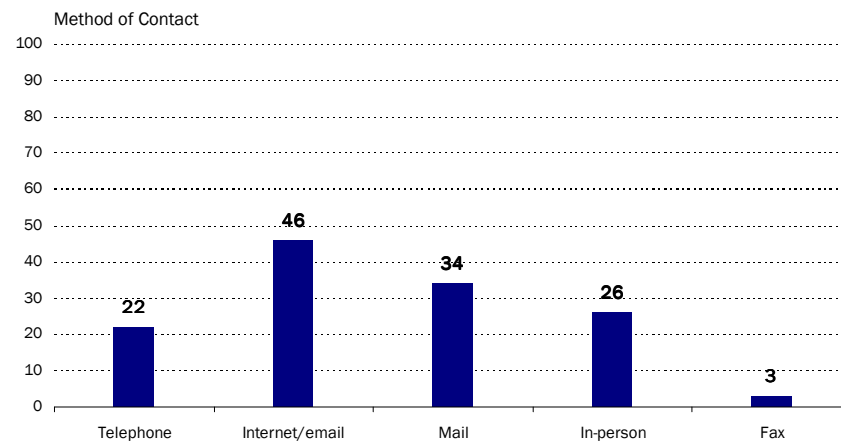
Methods vary in obtaining a replacement birth certificate:

Although Ontarians use various service channels to apply for a replacement birth certificate, almost half use the Internet in their interactions on this method.



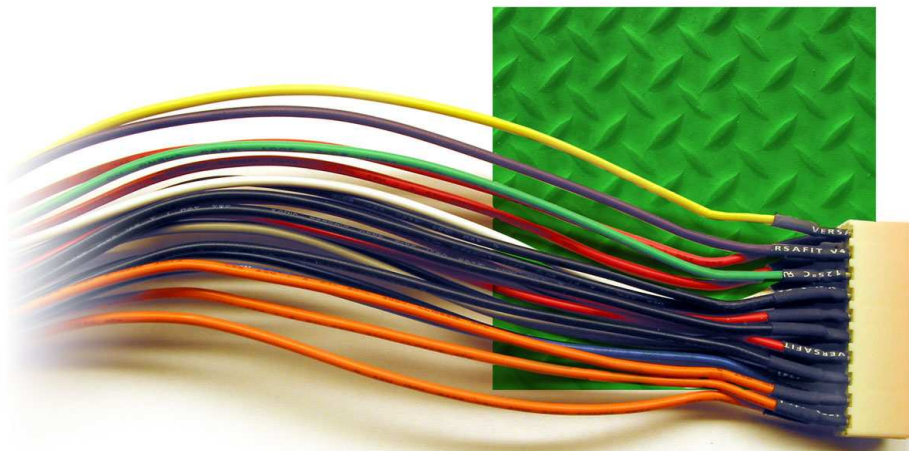
Q:

In the past year, have you applied for a new or replacement birth certificate for either you or another family member?
(BASE: All Ontarians; July 06, n=1723)



Q:

And what method(s) of contact did it involve?
(BASE: Those who applied; July 06, n=241)



Channel preferences

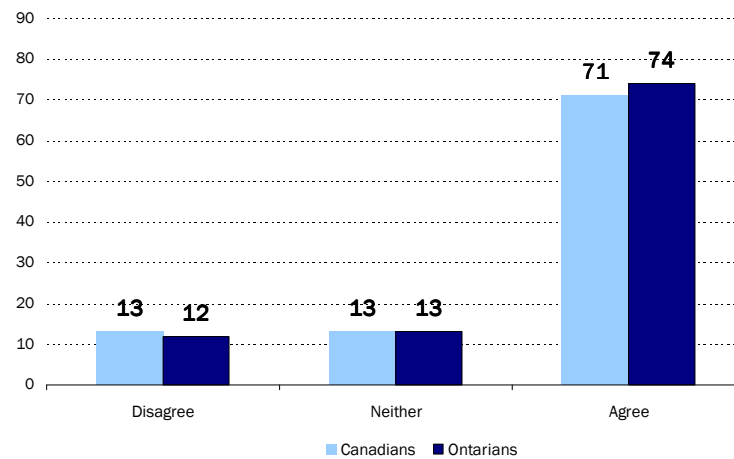
Highlights

- Ontarians continue to believe that the Internet will play a prominent role in future government interactions. Expectations show little overall change, suggesting that all channels will continue to play an important part in the service delivery environment. Despite the Internet's increased significance, the telephone continues to play a major role, especially in providing specific information.
- Ontarians, slightly more so than the rest of Canada, are more inclined to express a preference to do a majority of their government interactions online; however, there are still certain interactions where Ontarians prefer a more direct method such as telephone or personal contact.

Despite overwhelmingly expressing their confidence in finding government related information, there is still **a strong belief that Ontarians should be able to apply to one department for any provincial government program or service** — in other words, the philosophy embodied in many of the changes being implemented across the country.

Ontarians stress convenience:

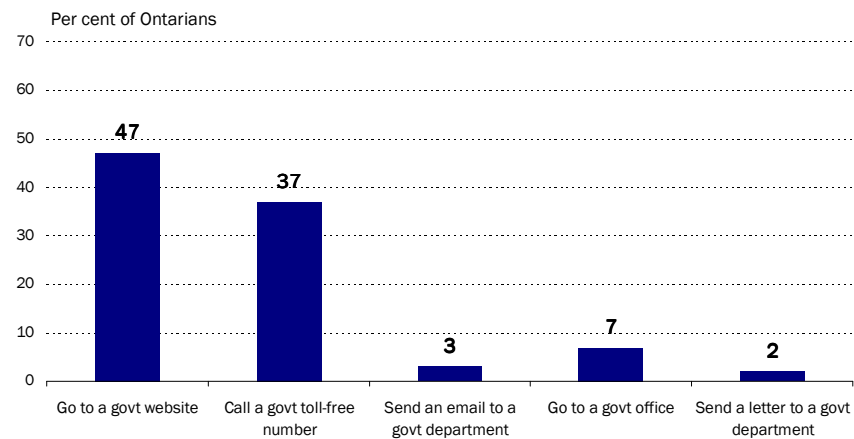
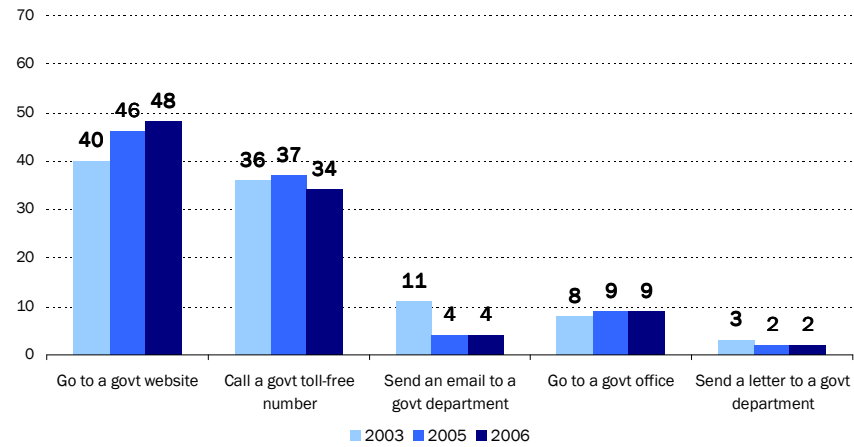
Ontarians overwhelmingly believe the application process for any government program should require contacting only one government agency.



Q:
Canadians should be able to apply for any provincial government program or service by contacting ONLY ONE provincial government ministry or agency.
(BASE: All Canadians/All Ontarians; July 06, n=1170/433)

Canadians and Ontarians increasingly expect to turn to government websites:

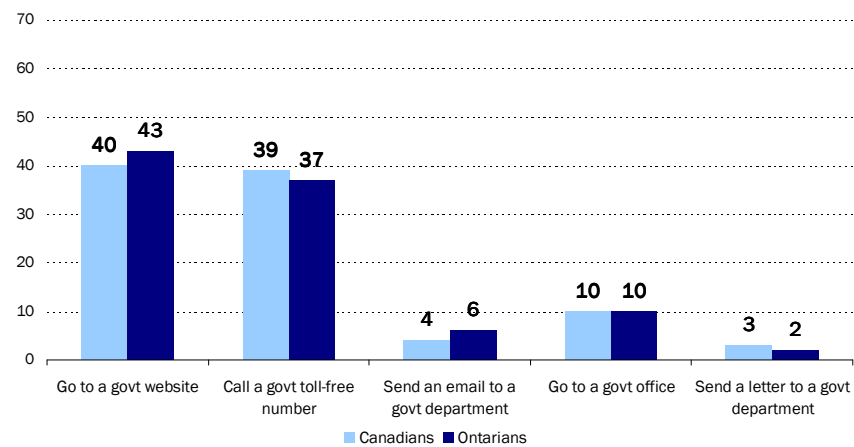
A growing number of Canadians and Ontarians report they would most likely use a government website than any other channel if they had to find information on a program or service.



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/All Ontarians; July 06, n=1087/433)

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

While Canadians and Ontarians 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.

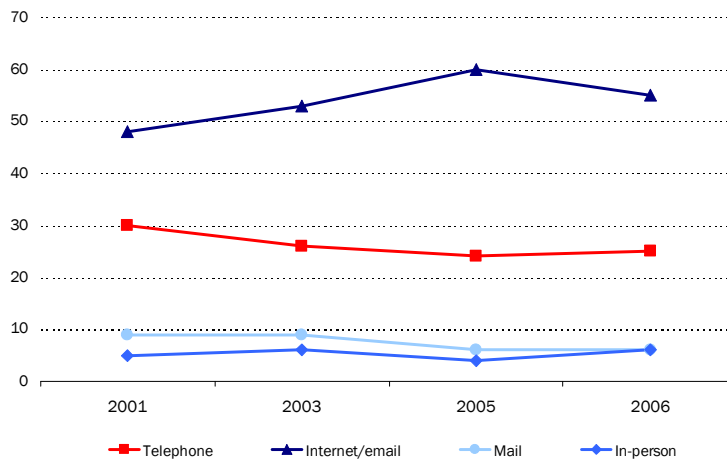
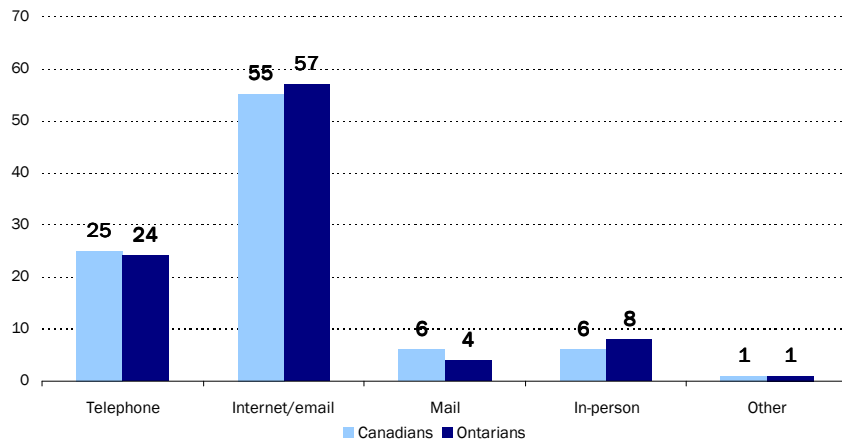


Q:
If you needed to get an answer to a specific question about a government program or service, how would you go about it? Would you be most likely to ...
(Base: All Canadians/All Ontarians; July 06, n=1137/464)

As in previous years, the majority of Ontarians believe the Internet will play a prominent role in their future government interactions. Despite this strong outlook, however, these expectations have not increased most recently suggesting that all channels will continue to remain important in the near 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 slightly less pronounced than last year.

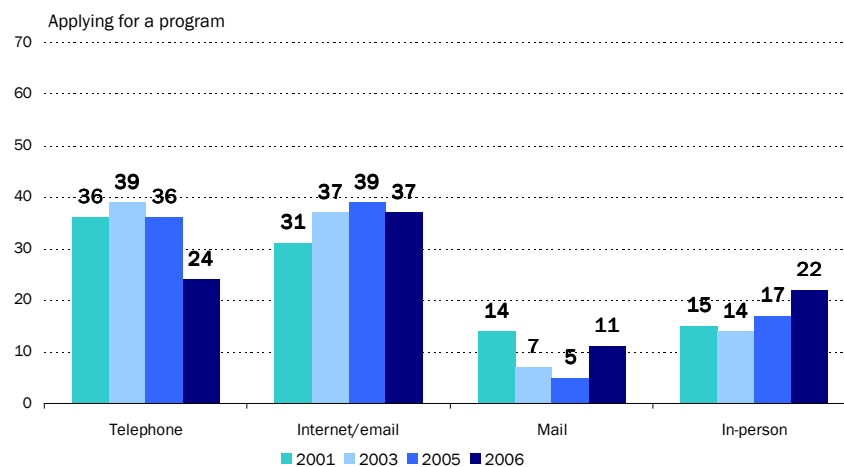


Q: Thinking about five years from now, what do you think will be your main method of contact with governments?
(Base: All Canadians/All Ontarians; July 06, n=1207/462)

Ontarians are increasingly expressing a preference to do a majority of their government interactions online; however, there are still certain interactions, such as updating a license or resolving a problem with a health card, Ontarians prefer a more direct method such as the telephone or personal contact.

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.

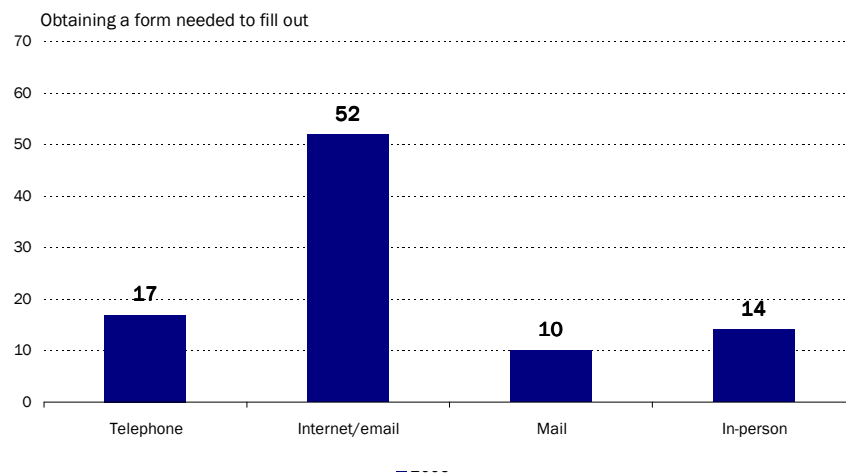
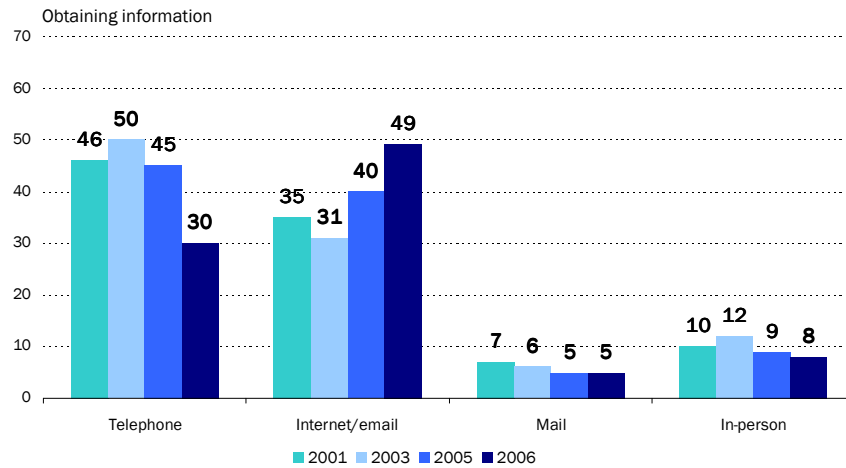


Q:

If you were to contact your provincial government to... what would be your preferred method of contact?
(BASE: All Ontarians; Aug./Sept. 06, n=635)

The Internet establishing new preferences:

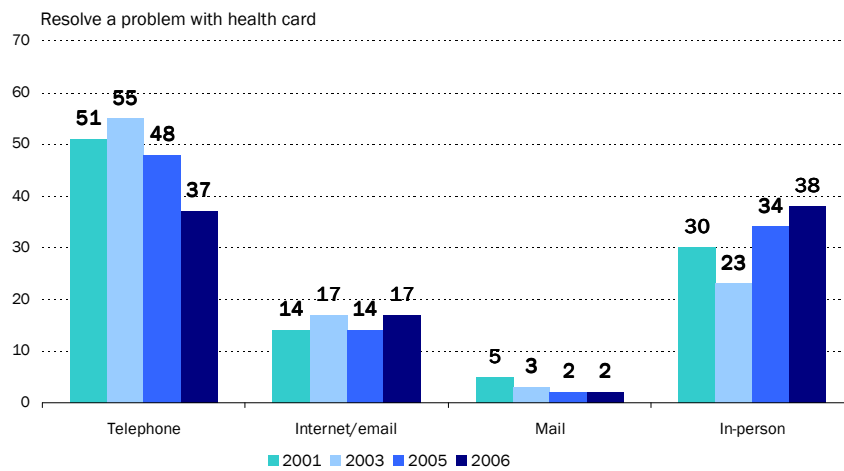
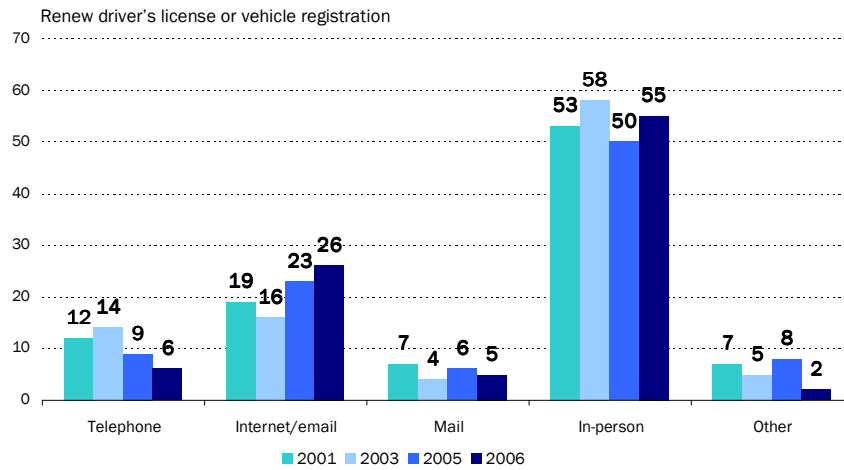
Major strides in online communication, immediacy and convenience in particular, have made the Internet the preferred method of contact in obtaining information and forms, replacing both the phone and mail channels.



Q:
If you were to contact your provincial government to... what would be your preferred method of contact?
(BASE: All Ontarians; Aug./Sept. 06, n=635)

The Internet establishing new preferences:

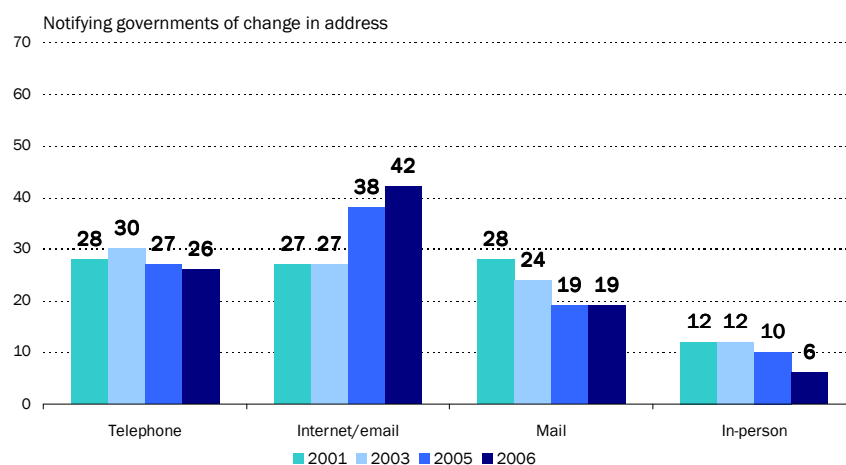
Major strides in online communication, immediacy and convenience in particular, have made the Internet the preferred method of contact in obtaining information and forms, replacing both the phone and mail channels.



Q:
If you were to contact your provincial government to... what would be your preferred method of contact?
(BASE: All Ontarians; Aug./Sept. 06, n=635)

Significance of the Internet in creating a change of address:

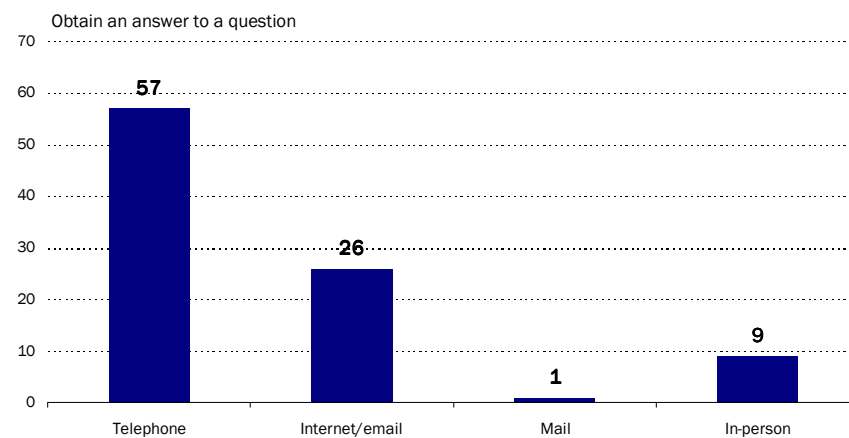
When it comes to notifying the government of a change in address, the Internet has long supplanted other channels as the preferred method of contact.



Q:
If you were to contact your provincial government to... what would be your preferred method of contact?
(BASE: All Ontarians; Aug./Sept. 06, n=635)

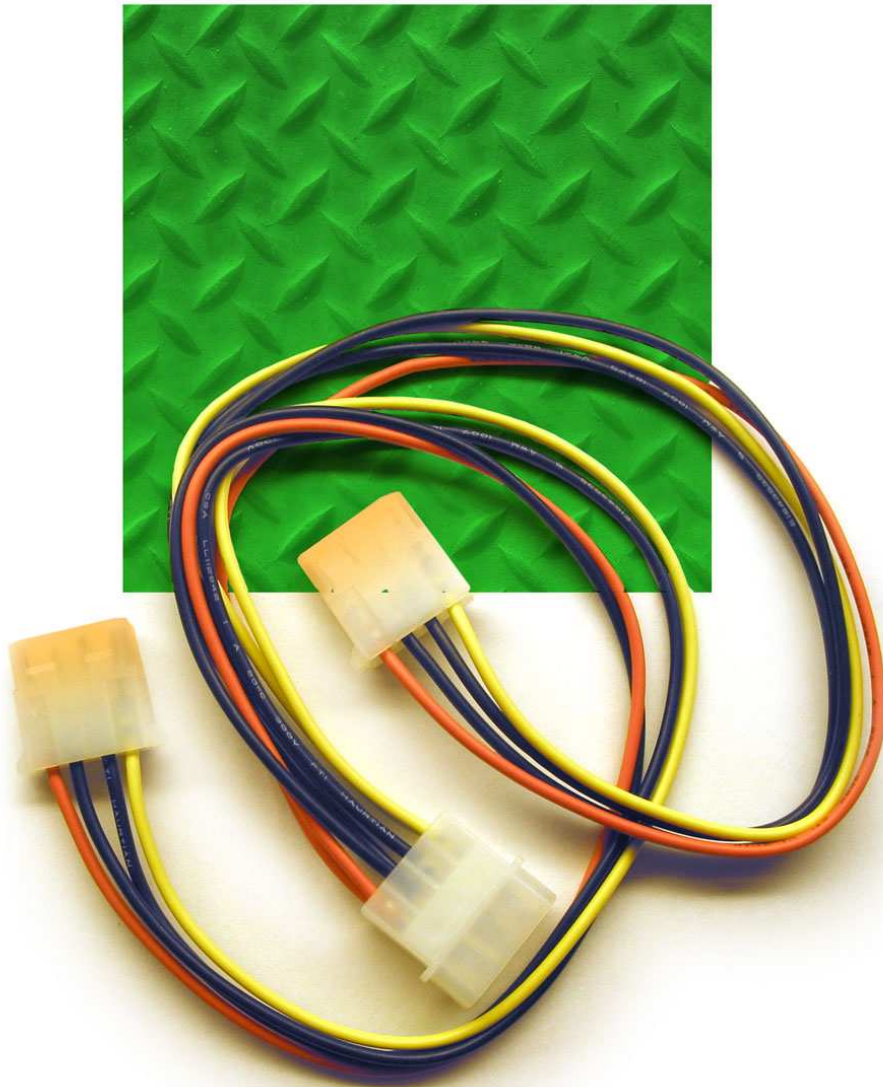
The phone continues to be the preferred method to obtaining answers:

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



Q:

If you were to contact your provincial government to... what would be your preferred method of contact?
(BASE: All Ontarians; Aug./Sept. 06, n=635)



Online channels

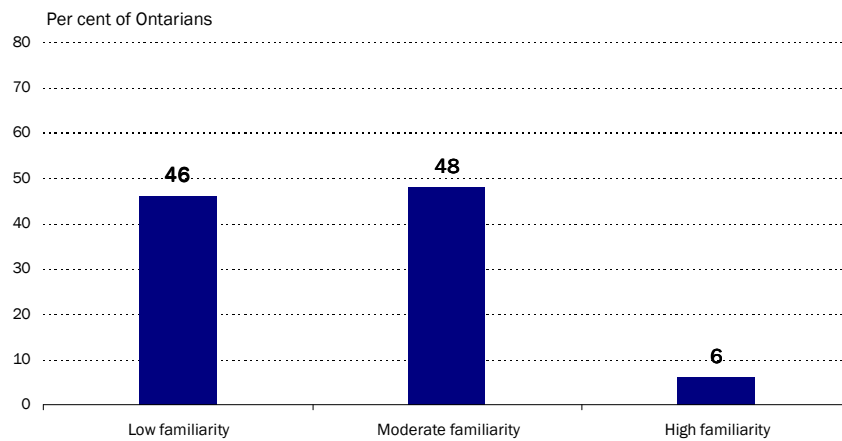
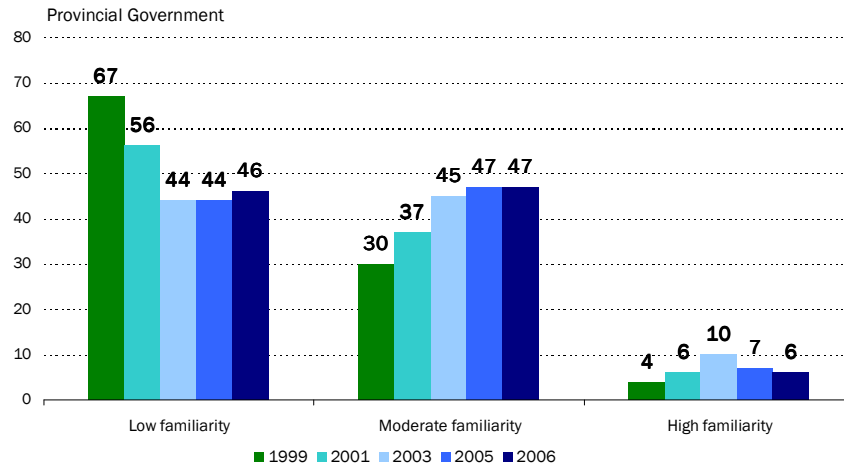
Highlights

- A majority of Ontarians prefer to do the majority of their government interactions online; citing ease of finding information as a major reason. Surprisingly though, a large amount are extremely unfamiliar with what services the various governments provide online.
- Ontarians are increasingly being exposed to the government online, either through their own interactions or through those of an intermediary. In fact, only a small minority have not done one of a series of common online government interactions.
- With a considerable amount of Ontarians reporting success in finding information about government resources online, there is little surprise that more than half of all Internet users have visited the Government of Ontario website in the past year.

Ontarians, similar to Canadians, **do not have a high level of familiarity with their governments' online service**. Both those who express low familiarity and those who express some familiarity are evenly divided, with only 1 in 10 Ontarians expressing high familiarity with government services provided online.

Familiarity with online services remain low:

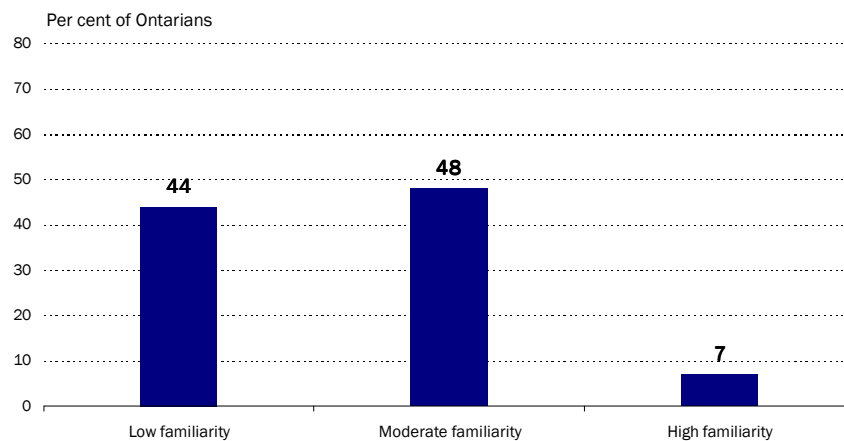
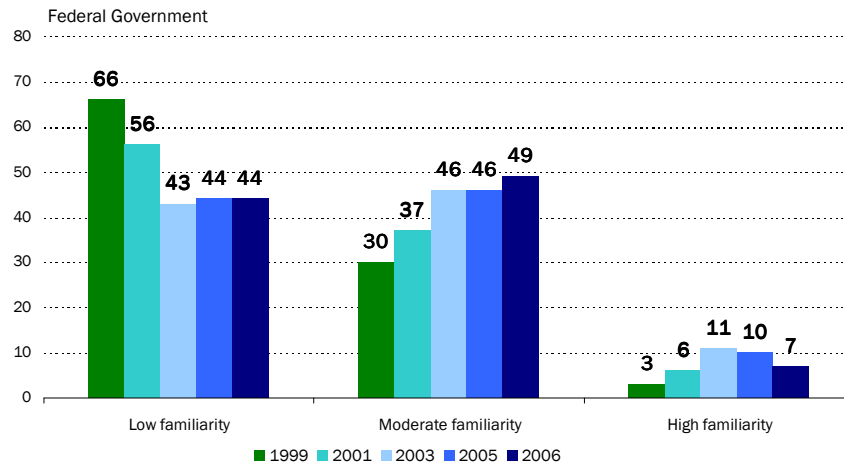
Despite a proliferation in visits to government websites over the past several years, Canadians continue to lack familiarity with government services provided online. In fact, there has been virtually no improvement since 2001 and fewer than 1 in 10 Canadians report high familiarity.



Q:
How familiar are you with the services provided by ... over the Internet?
(BASE: All Canadians/All Ontarians; Aug./Sept. 06, n=1586/635)

Familiarity with online services remain low:

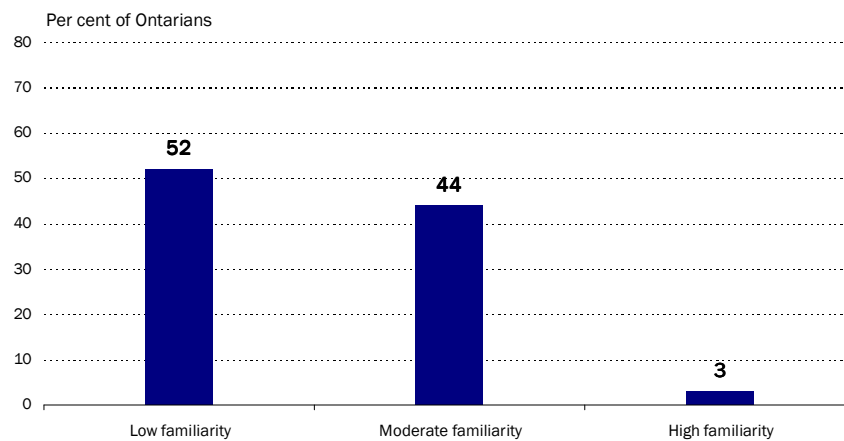
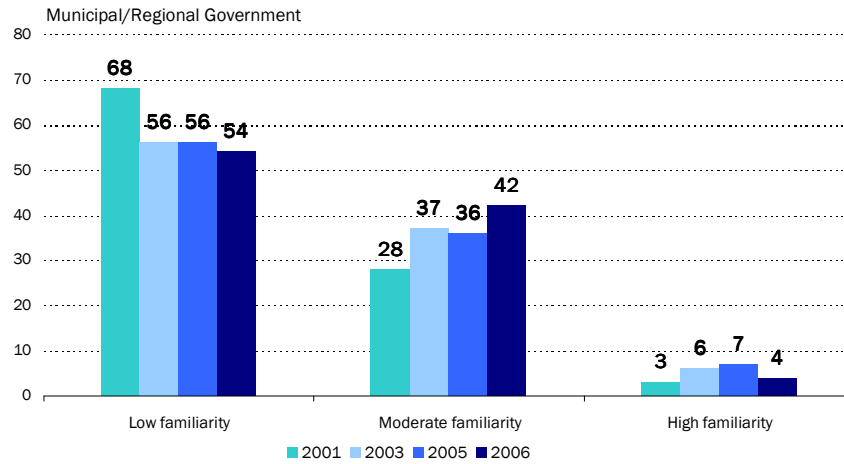
Despite a proliferation in visits to government websites over the past several years, Canadians continue to lack familiarity with government services provided online. In fact, there has been virtually no improvement since 2001 and fewer than 1 in 10 Canadians report high familiarity.



Q:
How familiar are you with the services provided by ... over the Internet?
(BASE: All Canadians/All Ontarians; Aug./Sept. 06, n=1586/635)

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.

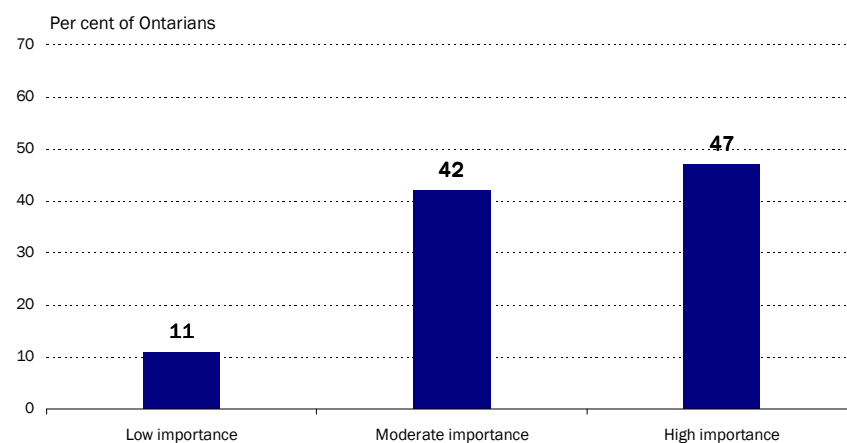
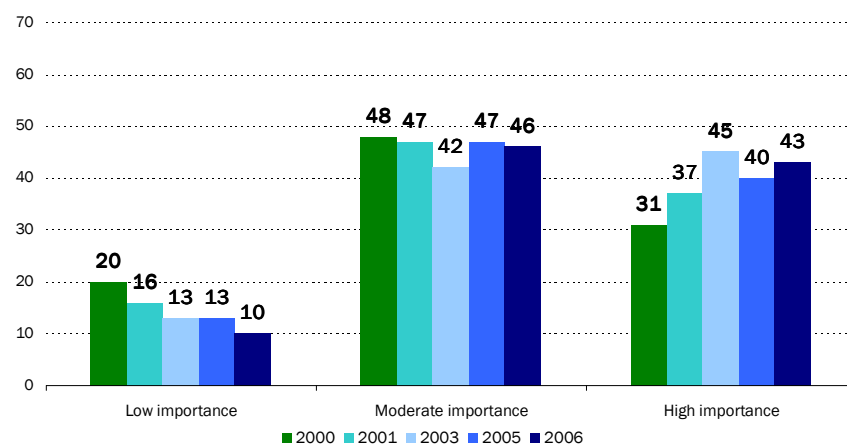


Q:
How familiar are you with the services provided by . . . over the Internet?
(BASE: All Canadians/All Ontarians; Aug./Sept. 06, n=1586/635)

Ontarians overwhelmingly agree that the Internet is an effective way for the government to make information available to citizens. With a significant increase of users agreeing that the Internet has made it easier to find information, almost half of all Ontarians would do most of their government interactions online if they could.

The Internet remains firmly entrenched in finding government information:

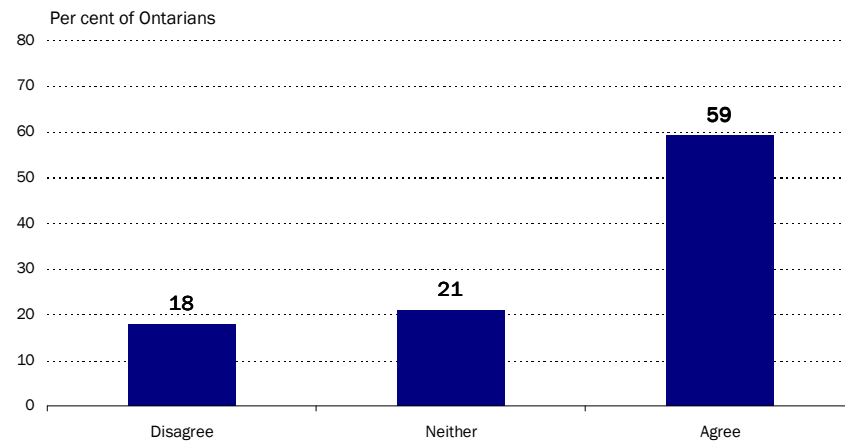
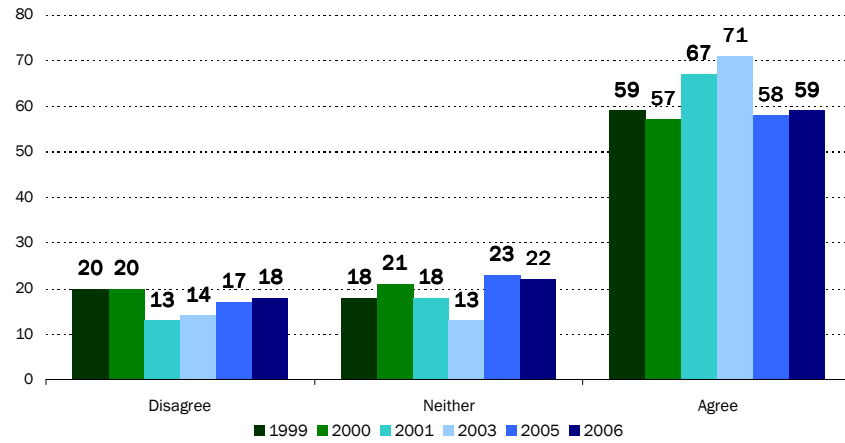
Internet users continue to point to the overall importance of the Internet in finding information regarding government programs and services. Only 1 in 10 users report that the Internet is of little or no importance.



Q: How important is the Internet as a way for you to find out information about government programs and services?
(BASE: Internet users/Ontario Internet users; Aug./Sept. 06, n=1281/525)

The Internet is an effective intermediary:

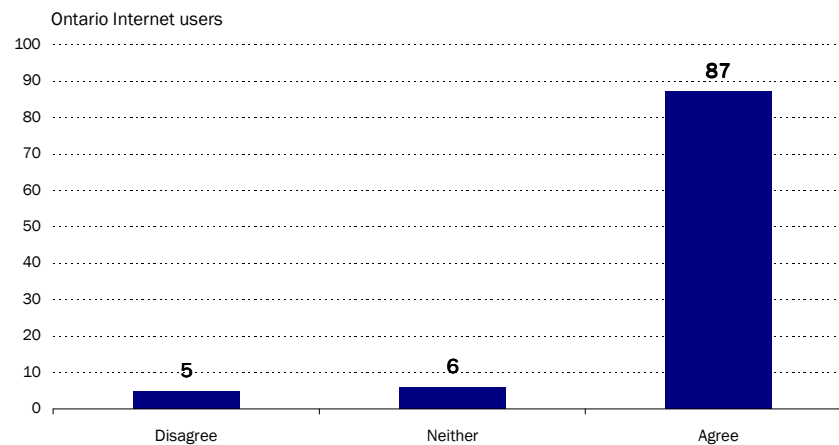
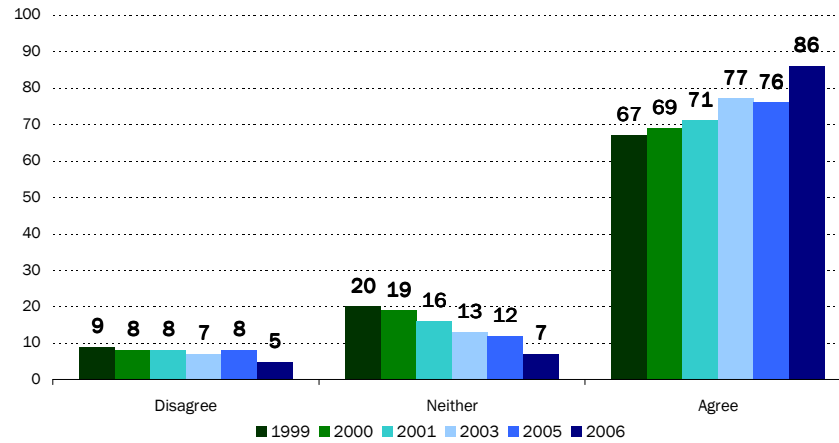
Canadians hold an overall positive view on the effectiveness of the Internet as a way for governments to communicate with Canadians.



Q: The Internet is an effective way for governments to communicate with Canadians about programs and services they offer
(BASE: All Canadians/All Ontarians; Aug./Sept. 06, n=1586/635)

Internet increasingly perceived as facilitating information search:

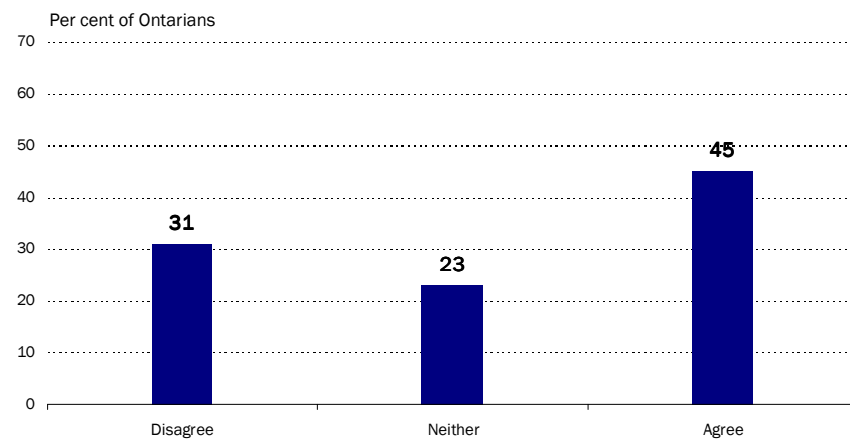
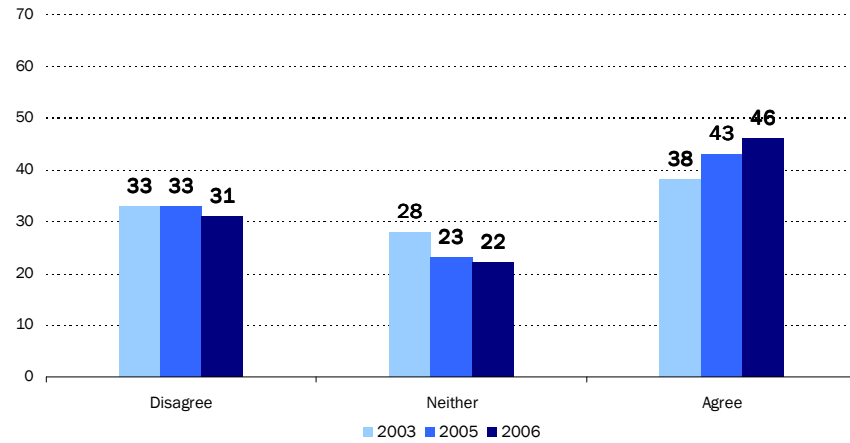
More than 4 in 5 users report the Internet has made finding government information easier, an overall increase from previous years.



Q: The Internet has made it easier to find information about government programs and services.
(Base: Internet users/Ontario Internet users; July 06, n=1281/378)

Canadians increasingly interested in online interactions:

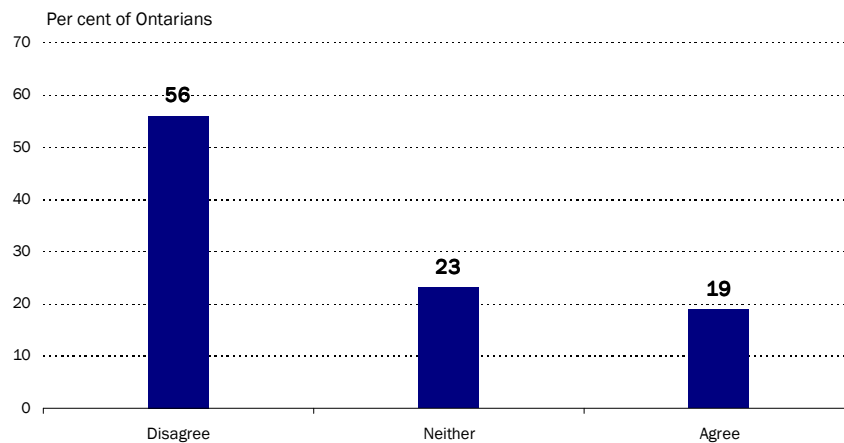
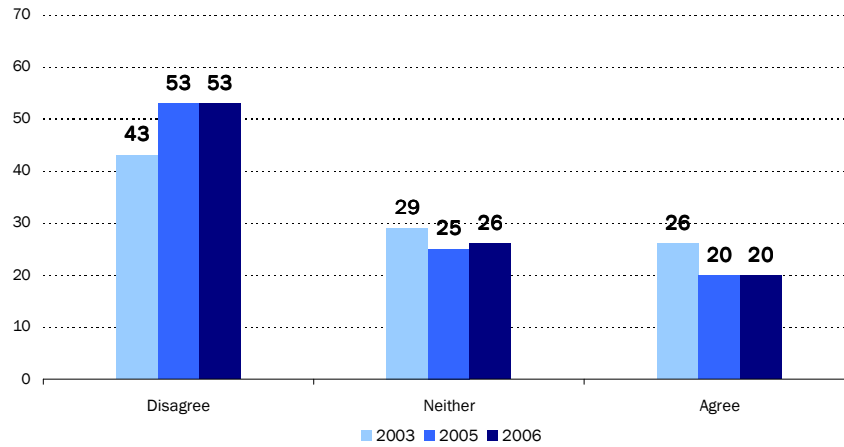
Gradually Canadians are embracing the possibility of using the Internet as a primary method of government interaction. Almost 1 in 2 Canadians would do most of their interactions online if they could, and up again this year.



Q:
I would do most of my interactions with governments online if I could.
(BASE: All Canadians/All Ontarians; Aug./Sept. 06, n=1586/635)

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.

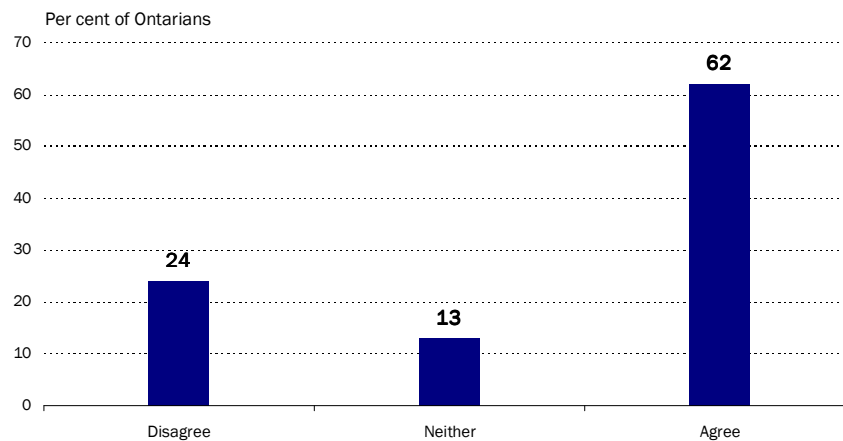
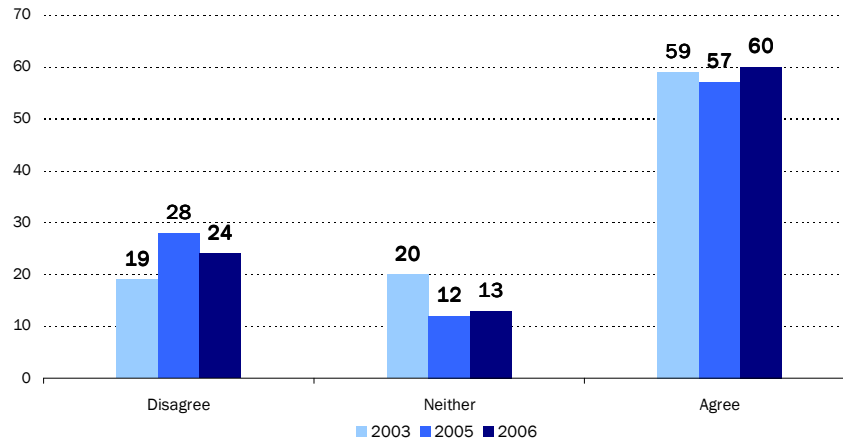


Q:
I don't see any real benefit to interacting with governments online
(BASE: All Canadians/All Ontarians; Aug./Sept. 06, n=1586/635)

Although Ontarians have optimistic views regarding both the effectiveness of the Internet as a way for governments to communicate with citizens and, in general, an interest in doing the majority of their government interactions online, a significant proportion of Ontarians continue to express discomfort with some types of online government interactions.

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.

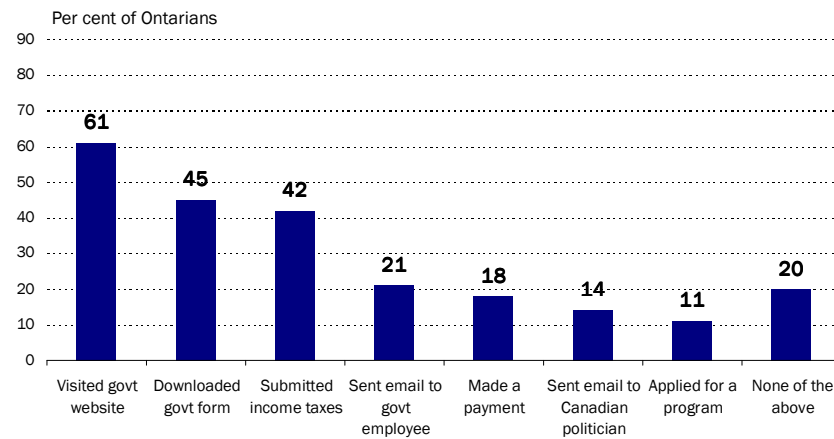
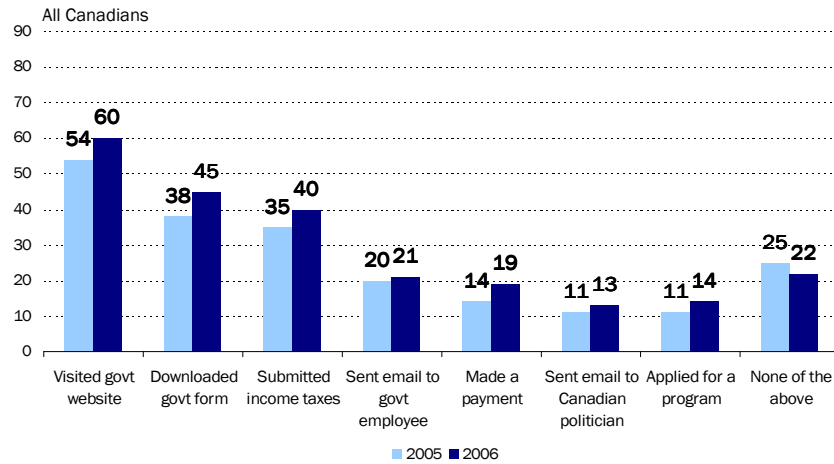


Q: There are some types of interactions with government that I would never do online.
(Base: All Canadians/All Ontarians; July 06, n=1137/464)

More Ontarians are being exposed to the 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 the common online government interactions. While demographical differences exist, it is worth noting that the majority of all age groups, including seniors, 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/All Ontarians; July 06, n=4518/1723)

Interactions

(Per cent)

	Visited a government Website	Downloaded a government form	Submitted Income taxes	Sent email to a government employee
All Ontarians	72	52	42	26
Gender				
Males	72	49	42	25
Females	72	55	42	26
Age				
25 and under	74	36	27	20
25-44	78	60	48	28
45-64	69	53	44	27
65 and over	52	40	34	18
Household Income				
<\$20k	72	46	38	20
\$20-\$39k	69	44	32	26
\$40-\$59k	67	48	36	23
\$60-\$79k	75	54	52	24
\$80-\$99k	74	56	42	31
\$100k +	80	66	50	37
Location				
Urban	74	53	42	27
Rural	66	48	40	19

Q:

Have you done any of the following activities with governments over the Internet?
(BASE: All Ontarians; July 06, n=1359)

Interactions

(Per cent)

	Made a payment	Sent email to a Canadian politician	Applied for a program	None of the above
All Ontarians	22	17	13	14
Gender				
Males	23	16	12	14
Females	18	18	13	13
Age				
25 and under	16	12	19	15
25-44	24	17	16	11
45-64	22	18	8	26
65 and over	13	25	4	23
Household Income				
<\$20k	18	14	25	17
\$20-\$39k	15	18	10	21
\$40-\$59k	16	15	14	18
\$60-\$79k	25	20	9	9
\$80-\$99k	27	16	9	11
\$100k +	27	24	16	8
Location				
Urban	23	18	14	13
Rural	16	13	9	16

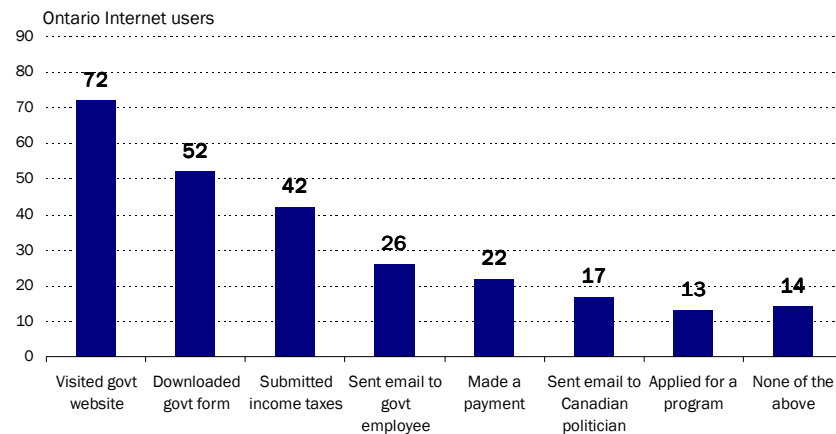
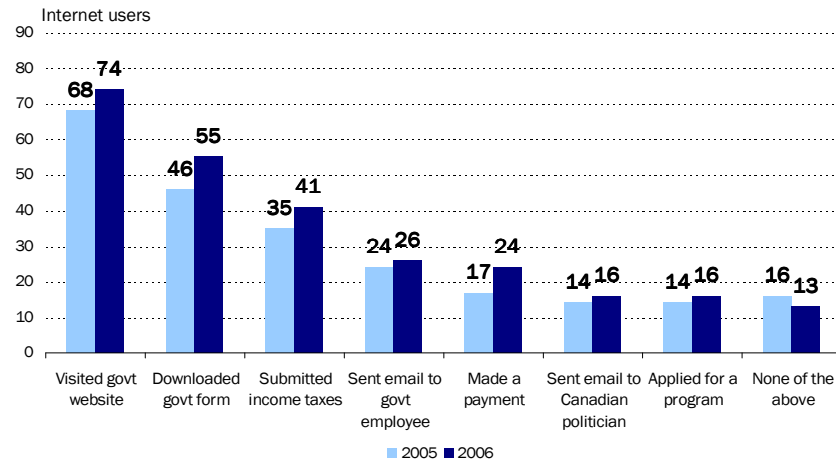
Q:

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

(BASE: All Ontarians; July 06, n=1359)

Incidence of online activities up in many areas:

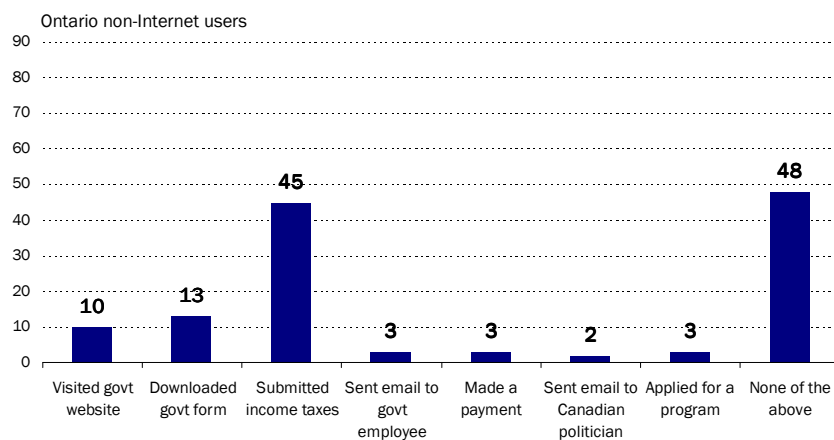
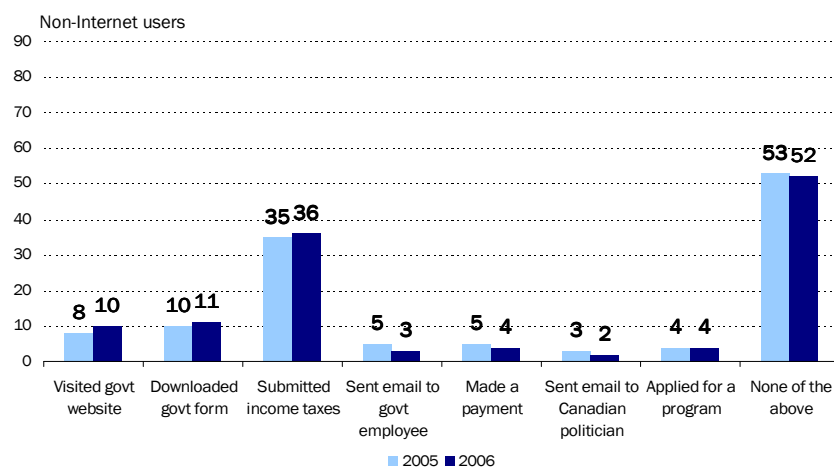
The overwhelming majority of users have done some type of interactions with government online. In fact, only a slim minority of users have not done any common type of government interaction.



Q:
Have you ever done any of the following activities with governments over the Internet?
(Base: Internet users/Ontario Internet users; July 06, n=3382/1359)

Sizeable minority of non-users rely on intermediaries:

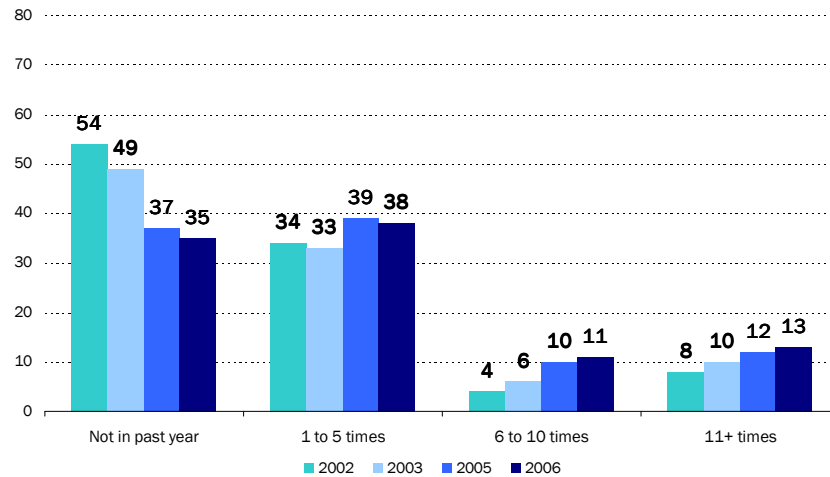
While a slim majority of non-users have not done various online transactions through an intermediary, many who are not online are still taking advantage of newer resources.



Q:
Have you ever done any of the following activities with governments over the Internet?
(Base: Non-Internet users/Ontario non-Net users; July 06, n=1137/365)

Ontarians continue to visit government websites:

The overwhelming majority of Ontarian users have visited a least one of their provincial government's website in the past year.

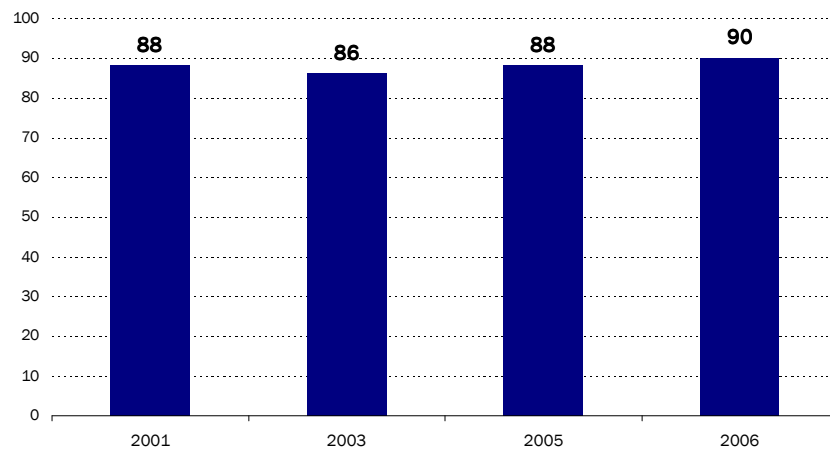


Q:

How many times have you visited Government of Ontario websites over the past twelve months?
(BASE: Ontario Internet users; Jan. 05, n=1359)

Overwhelming majority are successful in finding information:

9 in 10 users that have visited a provincial 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: Ontarians who visited provincial government websites in the past year; July 06, n=835)

Government of Ontario websites visited

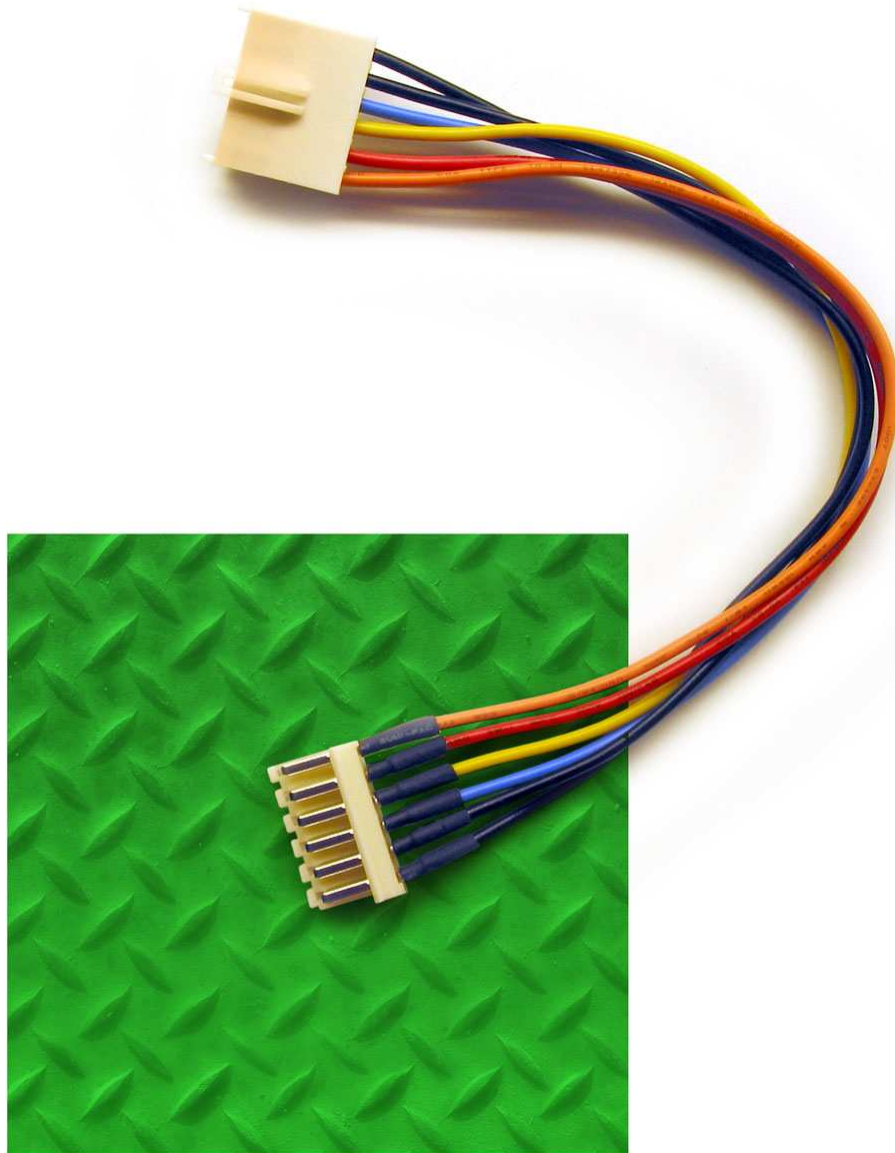
(Per cent)

	2006
Health and Long-Term Care	20
Transportation	16
Main Ontario Government website	14
Natural Resources	8
Ministry of Education	8
Jobs and Economy	7
Ministry of Labour	6
Provincial Job Opportunities	6
Tourism	5
Birth/Death certificate	5
Government Services	4
Culture	3
Community and Social Services	3
Ministry of Finance	2
Student loans/OSAP	2
Ontario Legislature	1
Housing/Landlord laws	–
Other	25
DK/NR	13

Q:

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

(BASE: Ontarians who have visited an Ontario government website in the past 12 months; July 06, n=836)



Fostering uptake of online channels

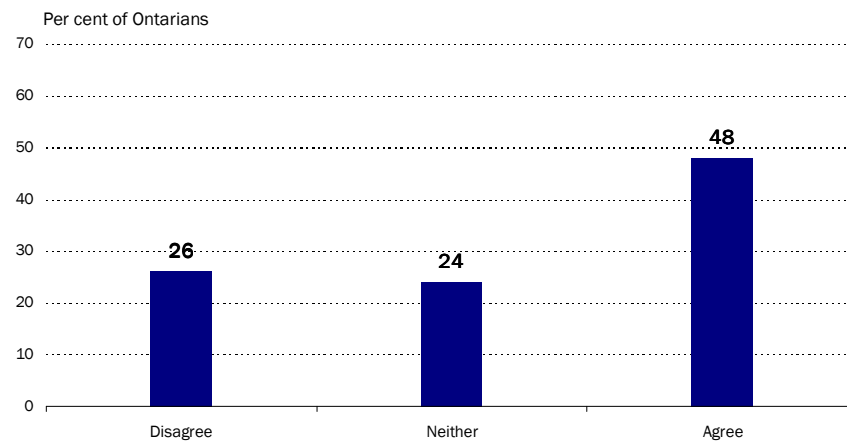
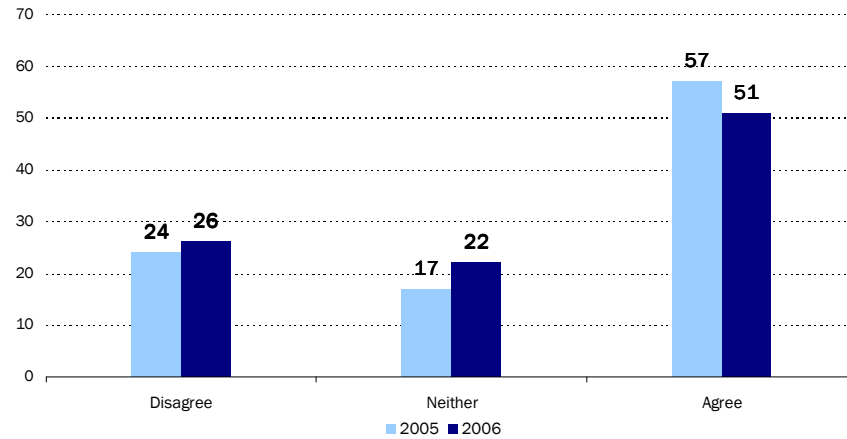
Highlights

- An overall lack of awareness regarding government services online coupled with the infrequency of contact between Ontarians and governments has had an impact on the perceived value of online government programs that would allow trouble-free transactions.
- Ontarians agree that certain changes to the online channel could encourage Internet usage. The positive results of a variety of different ideas reinforces that governments should consider making changes to the online environment.

Low awareness of services coupled with infrequency of contact have had a direct affect on the perceived value of certain online government programs. That said, Ontarians also agree that they should be able to apply to both federal and provincial programs by visiting only one site.

Infrequency of contact affects value proposition:

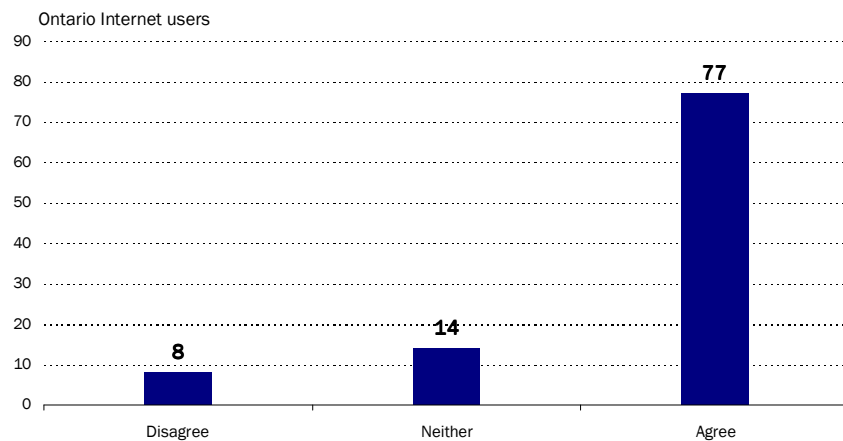
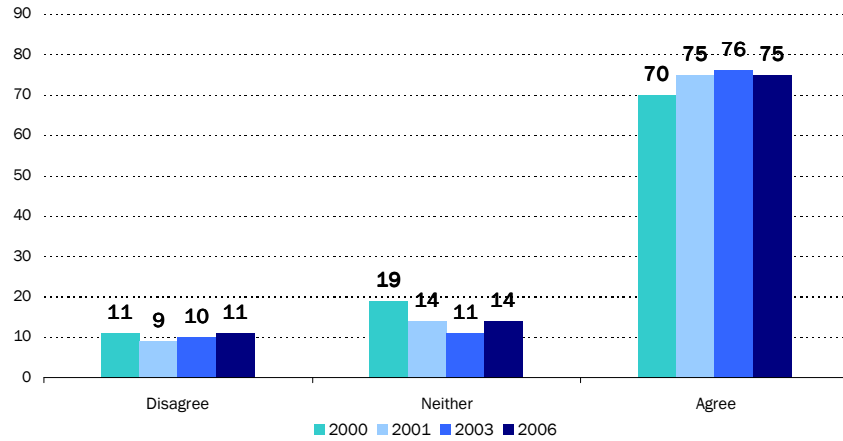
The value proposition of online transactions is weakened by the infrequency of government contact. Despite increased interactions, the majority still point to this as an obstacle to obtaining an online account.



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=635)

Online application process requires convenience:

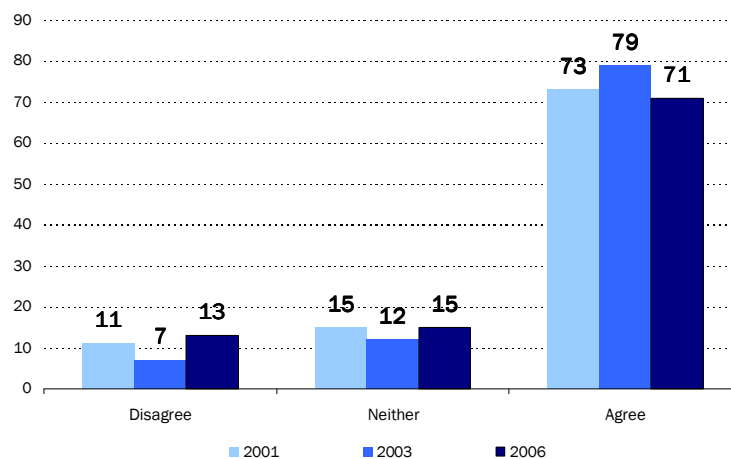
The overwhelming majority of users continue to believe applying for programs and services from different government departments should require visiting only one federal website.



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/Ontario Internet users; July 06, n=843/317)

Online application process requires convenience:

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



Q: Canadians should be able to apply for programs and services from different provincial ministries by having to visit only one provincial government web site.
(BASE: Ontario Internet users; July 06, n=330)

Ontarians overall tend to agree that **a variety of changes to the online channel could encourage Internet usage**. The positive results of a variety of different ideas proves governments should consider making significant changes to the online environment.

Types of interactions would not do online

(Per cent)

	2005	2006
Conducting financial transactions	24	25
Providing personal information other than Social Insurance Number	28	22
File income taxes online	25	8
Providing Social Insurance Number	23	9
Providing health information	14	12
Passport	15	7
Voting	12	–
Other	14	18
Would not do any types of interaction online	11	7
DK/NR	17	30

Q:

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

(BASE: Ontarians who would never do some types of interactions with governments online, July 06, n=346)

Encouraging use of online services

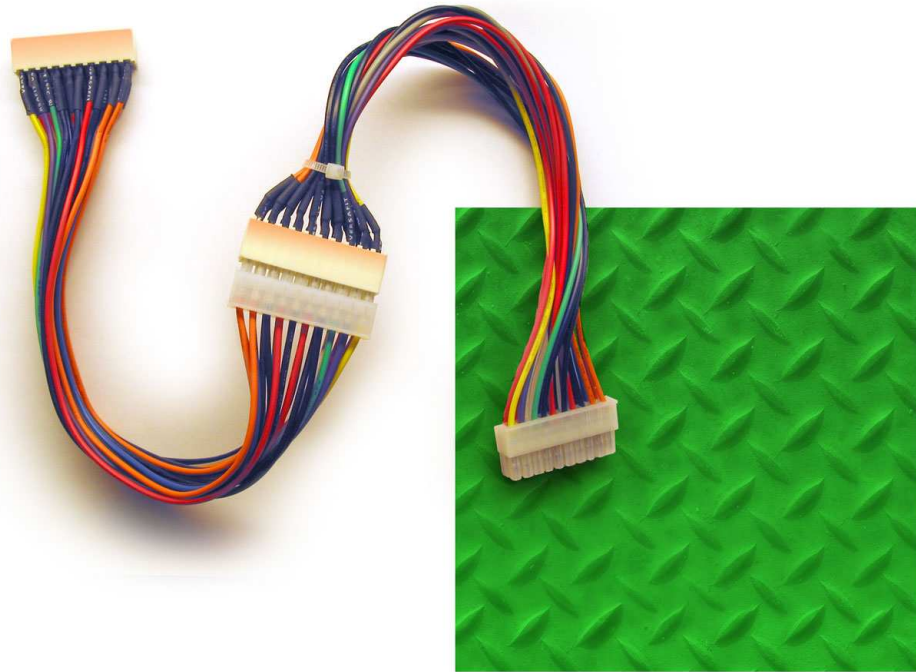
(Per cent)

	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	7	43	44	6.03
Offering a discount or incentive	3	3	8	38	45	5.90
Guaranteeing a faster processing time	1	3	10	47	36	5.79
Notifying you ahead of time of important dates	3	4	14	39	36	5.59
Making it possible to view all of your personal information in a single secure website	4	4	14	44	32	5.51
Making more programs/services available online	3	6	15	49	25	5.40
Providing better understanding of how your personal information is used and what can and cannot be done with it	2	5	12	46	31	5.54
Making citizens more aware of what types of government interactions they can do online	4	5	22	46	22	5.23
Making it possible to update your information in a single transaction rather than dealing with multiple departments separately	5	5	16	42	29	5.35

Q:

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

(BASE: All Ontarians that expect net interaction with the government; Aug./Sept. 06, n=460)



Appendix A: Key Internet Trends

Recent Internet usage – Ontario

% of Ontarians using Internet in past 3 months

	2000	2001	2002	2003	2005	2006
All Ontarians	65	73	70	81	81	81
Gender						
Males	69	76	74	79	83	83
Females	61	69	66	82	79	80
Age						
25 and under	89	94	89	100	96	94
25 – 44	75	85	81	90	90	92
45 – 64	61	66	65	76	82	84
65 and over	24	34	23	51	39	40
Household Income						
<\$20k	39	51	51	60	57	63
\$20 – \$39k	44	54	52	62	74	64
\$40 – \$59k	61	73	72	84	83	80
\$60 – \$79k	68	86	86	92	91	89
\$80 – \$99k	70	89	83	93	94	91
\$100k +	81	94	90	96	94	97
Region (Area Code)						
613	65	76	80	82	81	80
416	75	76	76	82	86	84
905	65	78	71	88	83	82
519	62	68	60	78	79	81
705	58	63	63	74	73	81
807	63	72	78	66	78	79
Location						
Urban	68	75	73	81	82	82
Rural	54	62	55	75	76	77

Q:

In the past 3 months, have you used the Internet, either at home or elsewhere?
(BASE: All Ontarians; July 06, n=1,723)

Home Internet Access

% of Ontarians with home Internet access

	2000	2001	2002	2003	2005	2006
All Ontarians	59	64	66	74	77	79
Gender						
Males	64	69	68	74	80	81
Females	54	60	64	73	73	76
Age						
25 and under	78	79	81	87	87	91
25 — 44	65	73	71	79	84	88
45 — 64	58	61	69	69	79	78
65 and over	28	35	28	57	44	46
Household Income						
<\$20k	39	41	51	56	51	64
\$20 — \$39k	44	46	48	58	70	63
\$40 — \$59k	61	64	66	78	78	77
\$60 — \$79k	68	76	79	78	82	83
\$80 — \$99k	70	86	73	90	90	89
\$100k +	81	88	89	91	92	94
Region (Area Code)						
613	59	69	72	74	76	79
416	67	64	69	78	77	82
905	60	71	70	79	82	79
519	58	59	55	71	73	77
705	52	56	65	64	71	75
807	50	65	64	77	83	81
Location						
Urban	61	66	68	74	77	80
Rural	52	59	57	68	73	73

Q:

Do you currently have access to the Internet at home?

(BASE: All Ontarians; July 06, n=1,723)

E-commerce

% of Ontarians who have bought online

	2000	2001	2002	2003	2005	2006
All Ontarians	22	30	34	43	47	50
Gender						
Males	27	36	39	46	52	54
Females	17	24	28	41	43	46
Age						
25 and under	27	29	45	49	56	59
25 — 44	28	39	41	52	58	60
45 — 64	18	29	30	40	46	48
65 and over	8	10	7	24	16	21
Household Income						
<\$20k	12	12	21	23	23	34
\$20 — \$39k	12	17	18	26	37	31
\$40 — \$59k	25	28	30	43	47	47
\$60 — \$79k	33	38	45	44	54	57
\$80 — \$99k	33	46	44	55	65	60
\$100k +	32	54	66	75	69	76
Region (Area Code)						
613	23	35	29	44	51	53
416	30	36	38	49	55	60
905	19	30	37	50	50	47
519	19	25	25	40	45	49
705	19	25	37	29	35	43
807	18	38	43	46	39	50
Location						
Urban	22	32	35	45	50	51
Rural	16	23	26	34	38	45

Q:

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

(BASE: All Ontarians; July 06, n=1,723)

Internet banking

% of Ontarians banking online

	2000	2001	2002	2003	2005	2006
All Ontarians	17	27	30	37	46	49
Gender						
Males	22	31	34	38	49	51
Females	11	23	26	36	42	48
Age						
25 and under	12	21	28	43	50	50
25 — 44	25	38	38	47	58	65
45 — 64	14	22	29	33	42	46
65 and over	5	12	10	19	16	19
Household Income						
<\$20k	7	10	21	17	29	31
\$20 — \$39k	9	16	27	23	36	37
\$40 — \$59k	20	26	25	38	48	47
\$60 — \$79k	24	40	37	50	55	60
\$80 — \$99k	26	41	39	44	63	64
\$100k +	29	41	43	58	62	72
Region (Area Code)						
613	19	29	29	36	44	52
416	19	27	33	42	52	55
905	15	28	31	43	46	48
519	16	24	27	34	44	51
705	17	26	31	28	42	41
807	11	35	22	44	48	53
Location						
Urban	17	28	31	38	47	51
Rural	13	22	26	32	39	45

Q:

Do you do any of your personal banking either using the Internet or the telephone?
(BASE: All Ontarians; July 06, n=1,723)

Comfort sending taxpayer information online

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

	2000	2001	2002	2003	2005	2006
All Ontarians	53	55	61	61	65	65
Gender						
Males	56	63	65	67	69	65
Females	50	47	57	56	61	65
Age						
25 and under	40	52	62	71	59	52
25 — 44	57	58	65	63	71	72
45 — 64	56	56	68	59	64	67
65 and over	55	49	43	44	49	51
Household Income						
<\$20k	51	52	64	49	56	53
\$20 — \$39k	45	48	50	49	54	62
\$40 — \$59k	59	57	57	60	71	72
\$60 — \$79k	63	64	74	64	73	60
\$80 — \$99k	64	63	72	75	72	80
\$100k +	67	67	52	86	75	85
Region (Area Code)						
613	55	63	62	65	67	67
416	53	52	63	63	68	74
905	53	56	61	64	64	61
519	53	53	58	59	63	66
705	46	49	62	51	64	57
807	49	46	59	86	59	73
Location						
Urban	54	55	63	66	66	65
Rural	47	54	56	47	59	62

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: Ontario Internet Users; July 06, n=647)



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. In Ontario, the survey was undertaken with a total of 1,723 respondents.
- 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 and +/-2.0 percentage points respectively, 19 times out of 20. The margin of error half sample and quarter sample questions are +/- 2.1 and +/- 2.9, respectively for Canadians and +/-2.8 and +/- 3.9 for Ontarians.

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. 635 of those were from Ontario.
- 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 and +/-3.2 percentage points, respectively 19 times out of 20.