

CANADIAN PRESS / LEGER MARKETING

**Government Online:
A National Perspective**

Report

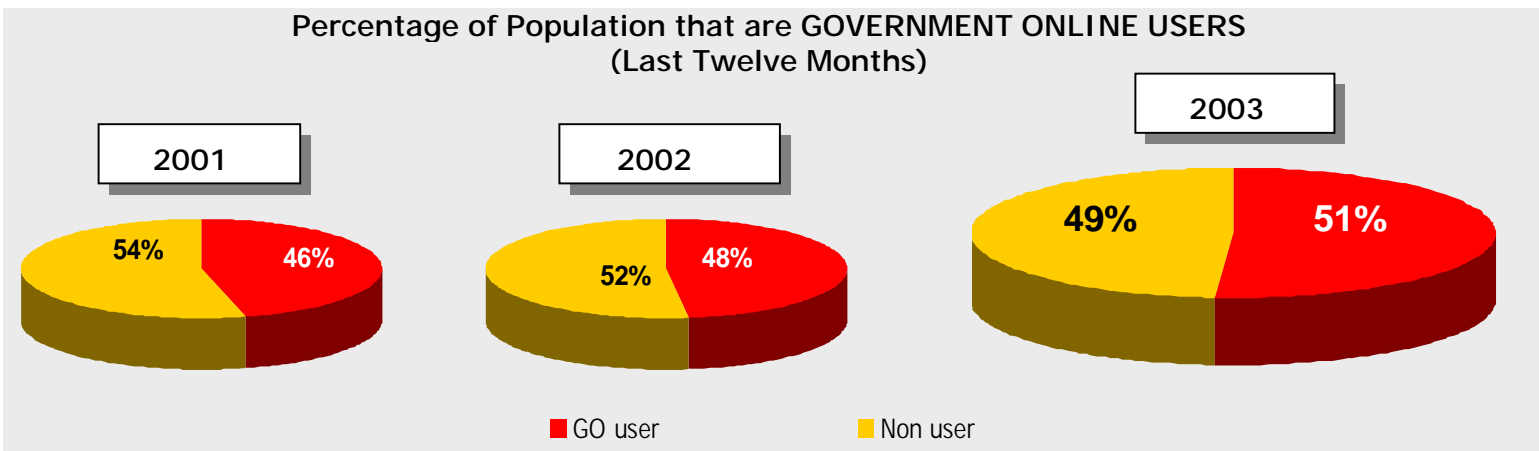
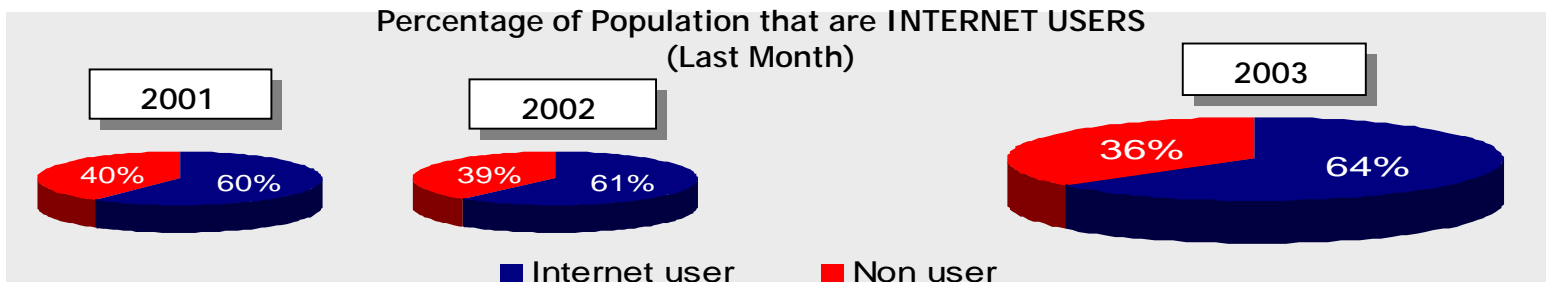


Level of Government Online Adoption

This study was conducted by Leger Marketing in August 2003 through telephone interviews among a representative sample of 1500 English- or French-speaking Canadians, within the context of the third Government Online research conducted by TNS with 31 823 people in 32 different countries. This study is unique in that it examines the uptake of Government Online from a citizen demand perspective. The maximum margin of error obtained for a sample of 1500 respondents is of ± 2.5 , 19 times out of 20.

1 Government Online Usage

- ▶ At the international level, usage of Government Online services increased significantly between 2001 and 2002 jumping from 26% to 30%, but has stabilized at 30% in 2003.
- ▶ 51% of Canadians have used the Internet to access Government Online over the last twelve months. This represents a three-point increase compared to 2002 (48%). This increase is in direct correlation with the proportion of Internet users, which went from 61% in 2002 to 64% today.

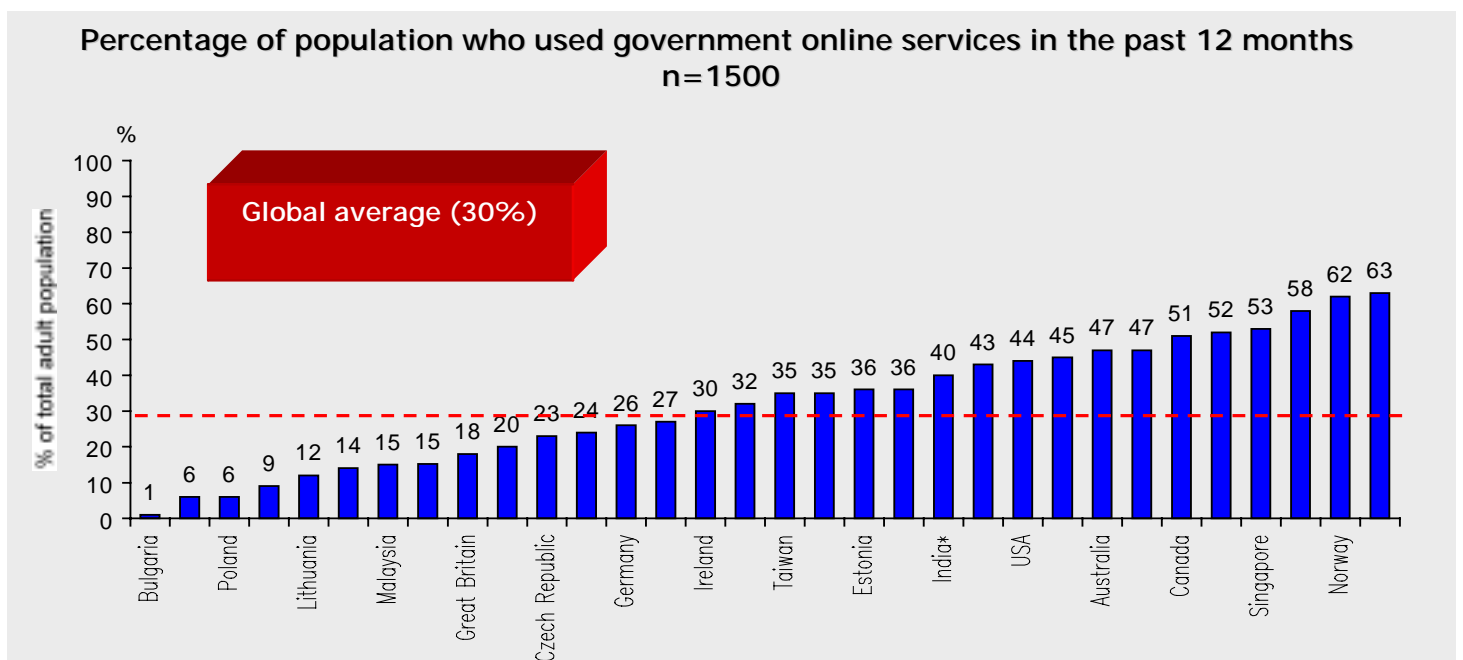


- ▶ At 58%, Québec has the lowest proportion of Internet users. In contrast, over 7 out of ten British Columbians (71%) used the Internet in the last month.
- ▶ Also, there are 15% more Government Online users in British Columbia, with an increase from 46% in 2002 to 61% in 2003. Atlantic Provinces have also shown a significant increase (11%) reaching 49% this year. However, Québec (45% of Government Online users) and the Prairies (41%) retain the lowest penetration for the second year in a row.

n=1500	GO users
British Columbia	61%
Alberta	53%
Ontario	53%
Québec	45%
Atlantic Provinces	49%
Prairies	41%
Canada	51%

2 Canada on the International Level

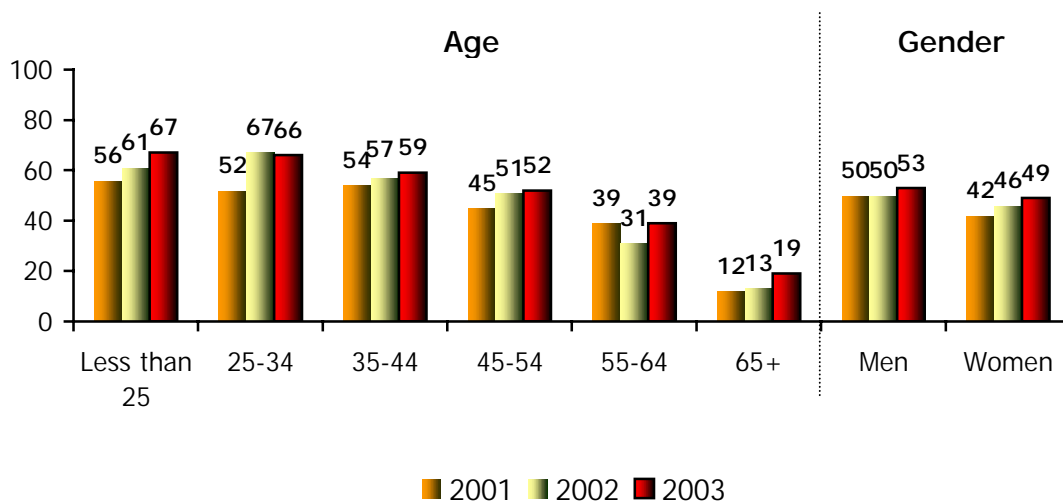
- ▶ Canada has very high penetration Government Online (51%) and ranks 6 out of the 32 countries surveyed and first in America as the United States are ranking 10th.



3 Who is using Government Online?

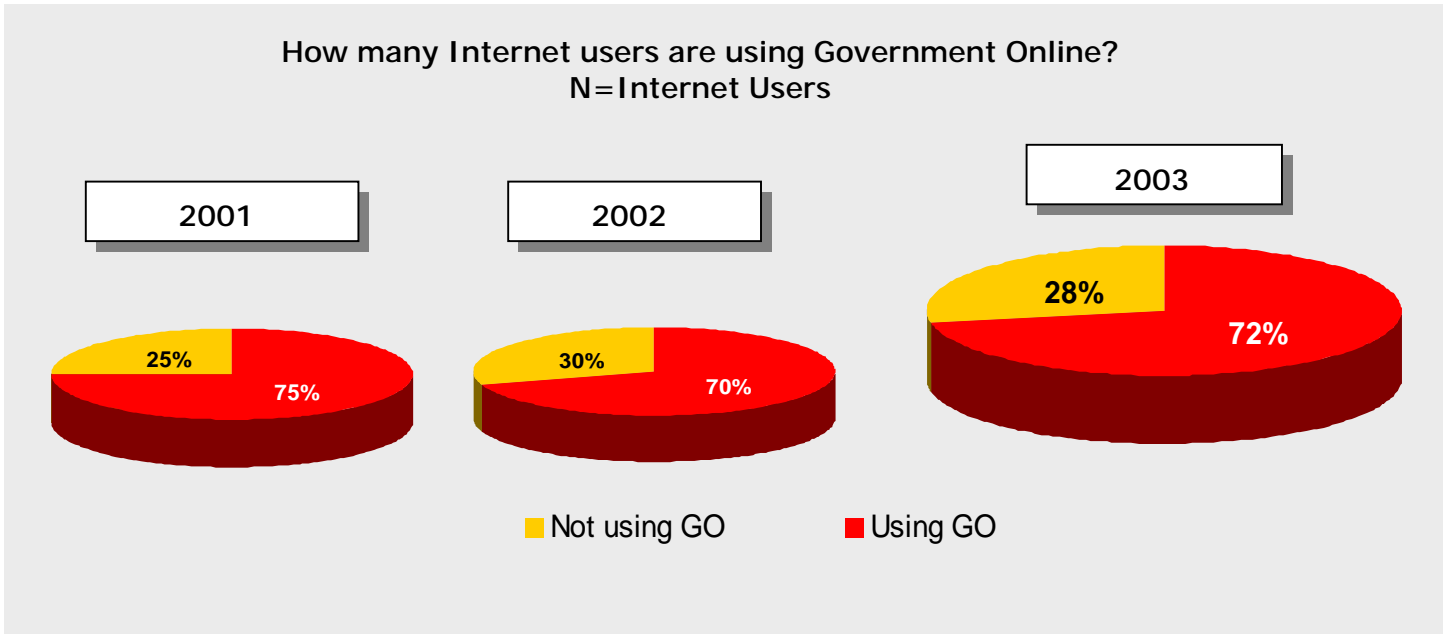
- ▶ □ The incidence of Government Online usage significantly increased again this year among those aged 25 years or less (from 61% in 2002 to 67% in 2003). Moreover, we also see the strongest growth in the acceptance rate among Canadians 55 years of old and older. In fact, Canadians between the ages of 55 and 64 have increased their usage from 31% to 39% and among those 65 years old and older, from 13% to 19%.
- ▶ □ The gap between men (53%) and women (49%) remains stable at 4 points. Also, Canadians with higher incomes and higher levels of education are more inclined to use these services.

Percentage of population who used government online services in the past 12 months
n=1500



4 Internet users and Government Online Usage

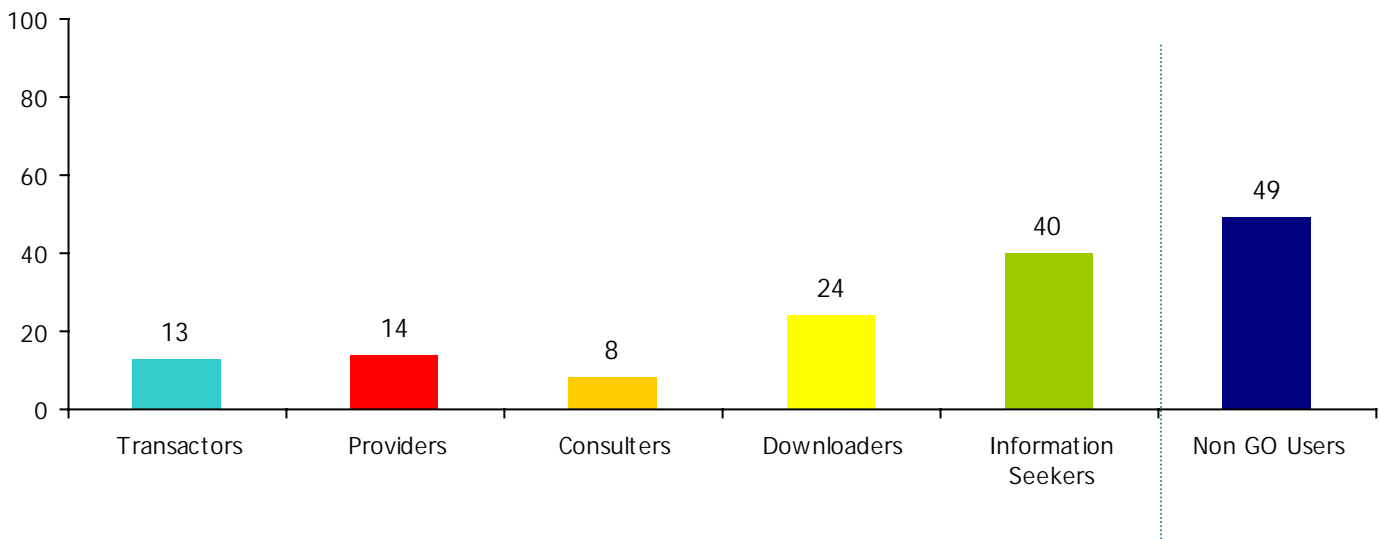
- ▶ The proportion of Internet users using Government Online services has slightly increased from 70% in 2002 to 72% this year.



5 All Government Online Usage in 2003

- ▶ There is very little change to the adoption curve for Government Online services since 2001, if only that the number of non-users has gone from 54% in 2001 to 49% in 2003. **Information seeking** (40%) is still in the lead, making it an important information channel for governments.
- ▶ On the other hand, usage of interactive services by **Transactors** (13%), **Providers** (14%) and **Consulters** (8%) has remained stable since last year. This could be an indication either that the services offered online are not sufficiently adapted to the community, or that the sense of insecurity remains a barrier to adoption.
- ▶ Among those who transact online are British Columbians (19%), and respondents from the Atlantic Provinces (18%); two regions that have seen respective increases of 8% and 4% since 2002. Ontario (14%), Québec (9%), the Prairies (8%) and Alberta (6%) are less likely to transact online. However, the degree of transactions with Government Online services increases with income, to 20% with higher incomes, 13% for average incomes, and 7% with lower incomes.

Government Online Usage N=1500



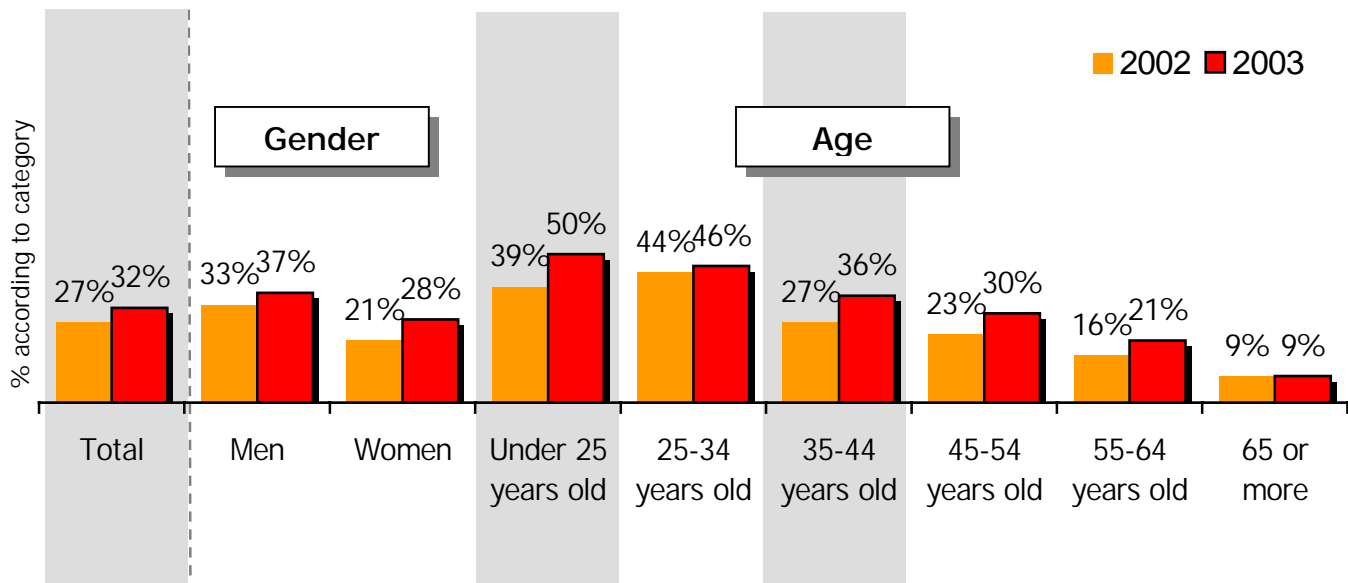
Government Online Changes From 2001 to 2003

	2001 n=1507	2002 n=1501	2003 n=1500	Variation
Nett GO Usage	46%	48%	51%	+3
Transactors	10%	12%	13%	+1
Providers	16%	17%	14%	-3
Consulters	N/A	7%	8%	+1
Downloaders	19%	24%	24%	-
Information Seekers	36%	37%	40%	+3
Non GO Users	54%	52%	49%	-3

6 Perception of Government Online Safety in 2003

- ▶ Web safety continues to preoccupy Canadian citizens, with only 32% considering it safe to transmit personal information to the government via the Internet. On the other hand, there is a significant increase (5% more when compared to 2002) in the number of Canadians who assert being comfortable enough to do this type of transaction.
- ▶ The perception of “safety” continues to be higher among men (37%) than women (28%), and also those 25 years of age or less (50%), those with higher levels of education (45%) and from higher income households (48%).

SAFETY BY GENDER AND AGE
N=1500



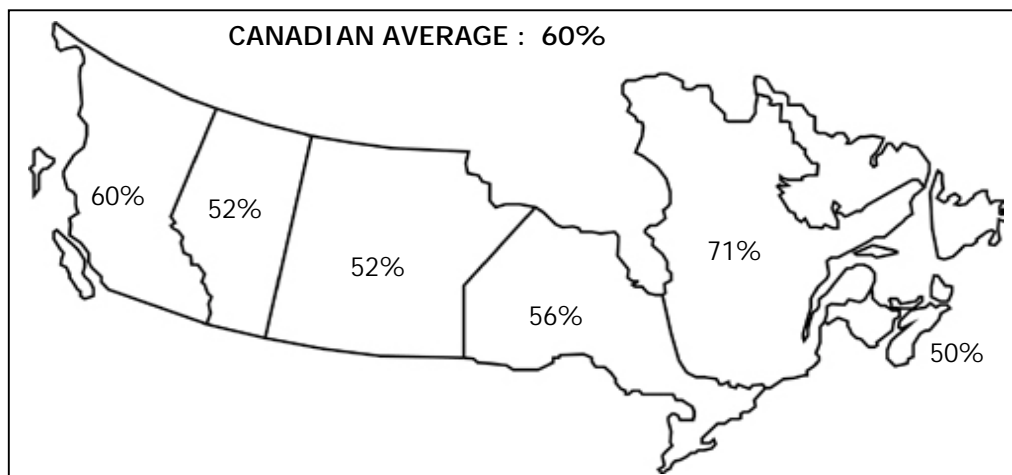
Shading indicates significant differences compared to 2002.

	2001 n=1507	2002 n=1501	2003 n=1500	Variation
Nett Safe	30%	27%	32%	+5
Very Safe	6%	7%	7%	-
Safe	24%	20%	25%	+5
Nett Unsafe	67%	67%	60%	-7
Unsafe	30%	22%	24%	+2
Very Unsafe	37%	45%	36%	-9

- ▶ □ Prairie citizens feel safer than Canadian citizens from other regions to provide Government Online with personal information such as credit card or bank account numbers and annual income.
- ▶ □ On the flip side, Quebecers are, in the strongest proportions, among those who consider that to provide this kind of information through the Internet is unsafe (71%).

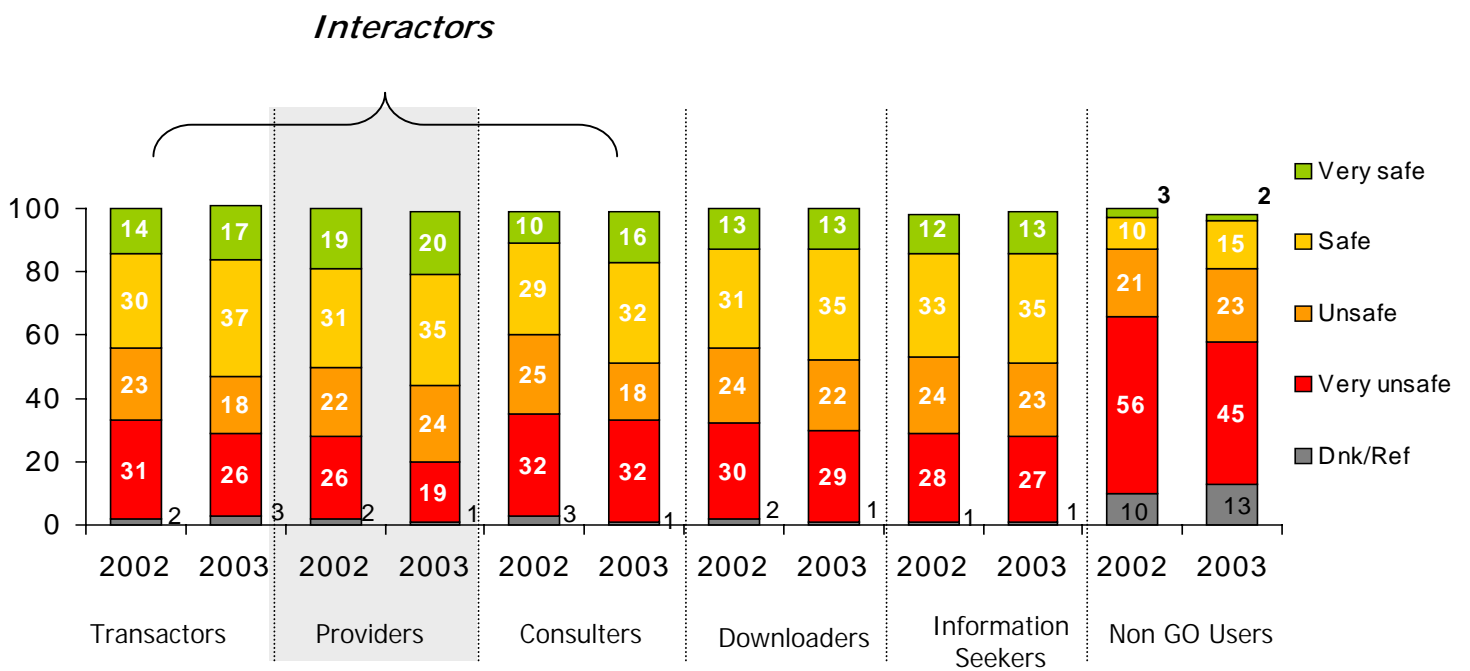
	2002		2003		Change
	Safe	Unsafe	Safe	Unsafe	
Atlantic Provinces	26%	70%	42%	50%	+16
Ontario	33%	58%	35%	56%	+2
British Columbia	25%	67%	34%	60%	+9
Alberta	24%	69%	32%	60%	+8
Prairies	18%	76%	31%	52%	+13
Québec	20%	76%	23%	71%	+3
Canada	27%	67%	32%	60%	+5

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



- ▶ Perceptions of safety are highest among Providers (55%), and Transactors (54%).
- ▶ Nonetheless a strong proportion of Transactors (44%) and Providers (43%) believe that this practice is unsafe or very unsafe.

Is Safety a Barrier to Adoption?
N=1500



Shading indicates significant differences compared to 2002.