



# Communications Survey

Listening to Canadians

Winter 2001



Canada  
Information Office

Bureau d'information  
du Canada

Canada

Communications Survey



Enquête sur les communications

## *Listening to Canadians*

*Winter 2001*

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## Introduction

The mandate of the Canada Information Office (CIO) is to improve communications between the Government of Canada and Canadians. In doing so, we promote better corporate communications by the Government as a whole and support the Government's commitment to a strong and united Canada.

The CIO's public opinion research continues to measure Canadians' views on public policy priorities, and their assessment of how the Government serves Canadians in responding to those priorities.

The research supports the Government's service initiatives by exploring how Canadians currently access services and obtain information from the Government, and their satisfaction with government service. It also explores the connection between contact with the Government, satisfaction with service and overall perception of the Government.

The winter 2001 survey focuses on the role of the Internet in providing service to the public, looking specifically at Canadians' priorities regarding on-line services and information. The importance of electronic security is also addressed. This research contributes to the Government On-Line initiative, which aims to make Canada the most electronically connected government in the world by 2004.

The results stem from our analysis of the most recent tracking survey on governmental communications. The Ipsos-Reid Group and GPC Communications conducted the survey of 4,950 adults across Canada between January 15 and January 31, 2001.



## Executive Summary

Social issues continued to dominate the public agenda, largely owing to concerns about health care. In contrast, economic issues were the top concern for a minority of Canadians. Health care remains the top priority of Canadians and it is also viewed as being the top priority of the Government.

Although Canadians are concerned with social issues, they believe the Government in its new mandate will focus primarily on economic issues.

Canadians are optimistic about the future of the country and about their own personal future. Their priorities are anchored in this positive outlook.

If, however, the economy slows down, Canadians will likely become more concerned with economic issues, particularly unemployment, and less concerned with social issues.

With regard to communications, there continues to be a segment of the population which the Government has difficulty reaching. Those who are least aware of recent programs, services or initiatives tend to have less than a high school education, not to be in the workforce, and to make less than \$20,000 per year. These are also the people who are more likely to have low literacy skills.

The role of service to the public in the overall relationship between the Government and citizens is paramount. Quality of service and the Government's overall performance ratings are strongly linked. The majority of those Canadians who do contact the Government to access service or information give favourable ratings to such contacts. Moreover, those Canadians who have had recent contact with the Government give consistently higher ratings to government service overall and to all aspects of government service. However, there is a low level of familiarity with government programs and services.

Of the different factors that contribute to overall impressions of government service, the key factor is the perception of reliability of service; this is the strongest driver.

As mentioned above, perceptions of government service are most favourable among those Canadians who have had contact with the Government. The *method* of contact also plays an important role. Canadians who were served in person give relatively higher ratings than those who used more impersonal methods, such as telephone or the mail. Service ratings are also higher among those Canadians who made contact through the Internet. This would suggest that increased adoption and use of the Internet may have profound implications for perceptions of the level of service and information delivered.

On the other hand, Internet access has remained stable over the past several months. Moreover, the gap between the segments of Canadian society that have tended toward massive adoption of the Internet and those that have not (e.g., those Canadians with more formal education and those with less) appears to remain wide. Despite a potential for further growth, there is a large segment of the Canadian population – disproportionately older and with less than high school education – that gives no sign of readiness to adopt the Internet. These segments will present a challenge to government communicators in the Internet age, not only because of their low rate of Internet usage but also because of their lesser propensity to contact the Government at all.



Notwithstanding these differences, a very large majority of Canadians have positive expectations of the Internet and Government On-Line, which they expect will improve the overall interaction between the Government and citizens. In particular, they also expect that Government On-Line will make the Government more innovative. As this report indicates, innovation is perceived to be a weak point in the Government's ability to deliver services.

Those Canadians with Internet access express great interest in using Government On-Line to file income taxes and to participate in giving input into both policy making and the political process itself. Demand for program-related transactions tends to be more concentrated among certain segments of the population, such as young adults.

There is also strong interest in using Government On-Line to access a multiplicity of types of information. Information on government programs and services available in the community commands the highest level of interest, especially among women. There is also much interest among adults for information related to education, careers and job searches.

First and foremost, Canadians also expect Government On-Line to maintain Web site security and privacy protection. Also ranking very high on the list of expectations are factors related to quality: reliable service and accurate information.

Combined with the wide and strong insistence that government Web sites provide absolute security and privacy, there are currently strong reservations about providing personal information to the Government in on-line transactions. Few Canadians are yet willing to provide personal identification numbers (e.g., social insurance numbers) and a bare majority are willing to provide non-financial personal information, such as health records.

Even if these security concerns are addressed, a notable proportion of the Canadian population will still prefer to use the traditional methods of conducting transactions: telephone, mail and personal contact. Again, this reluctance is concentrated in the population segments that have until now been less willing to embrace the Internet: older Canadians and those with less than high school education.

In terms of public perceptions of the Government's ability to deliver services and provide information, then, Government On-Line has the potential to bring about profound and long-term improvements. Given the positive ratings of Internet-based contacts with the public to date, Government On-Line particularly would appear to have the potential to meet the public's demand for high quality services and information, and to improve the Government's credibility in the areas of innovation and timeliness. However, the interaction between the Government and older Canadians and those Canadians with less formal education must be considered. Since the overall level of contact between the Government and these segments is low, and because the level of Internet use among these segments is also low, traditional methods of service and information delivery will have to be relied on to reach these segments for some time to come.

## Issues of Most Concern to Canadians in the Next Five Years

*“Thinking about the issues facing Canada today, which one would you say the Government of Canada should focus on most over the next five years?”*

### Social issues include:

Health care	34%
Education and schools	8%
Poverty/the poor/welfare	5%
Environment and pollution	3%
Water contamination	1%
Moral issues	1%
Native fishing rights	1%
Aboriginal issues	1%
Crime and violence	1%
Immigration/refugees	1%
Justice system	1%
Child abuse/Youth issues	1%
Women's and seniors' issues	1%

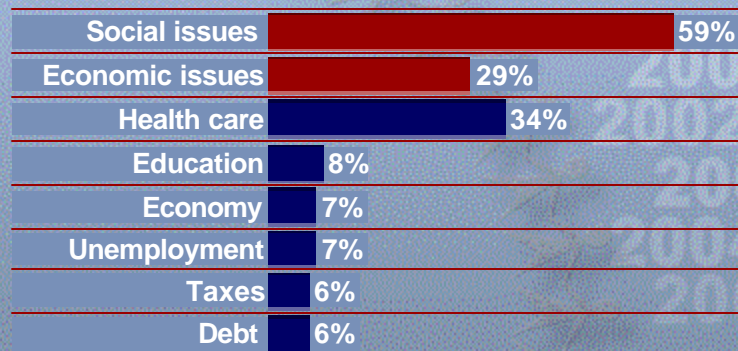
### Economic issues include:

Jobs/unemployment	7%
Economy in general	7%
Taxes/GST	6%
Debt/deficit/government spending	6%
Agriculture/farming	1%
Oil and gas prices	1%
Stock market/Canadian dollar/transportation/roads/ infrastructure/business/industry issues	1%



## Issues of Most Concern to Canadians in the Next Five Years (unprompted)

*"Thinking about the issues facing Canada today, which one would you say the Government of Canada should focus on most over the next 5 years?"*



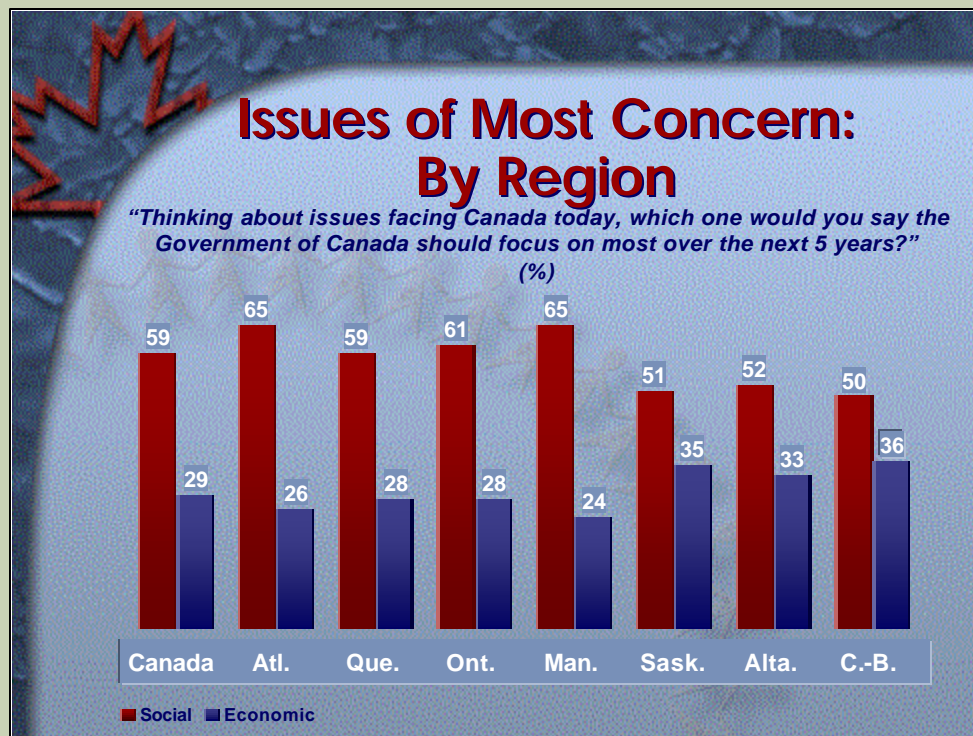
- When we asked respondents which one issue the Government should focus on most over the next five years, 59% mentioned social issues while 29% mentioned economic issues.
- Looking at the individual issues, health care continues to be the top issue. This is followed by education, the economy, unemployment, taxes and the debt.

## Issues of Most Concern: Fall 1998 to Winter 2001

*"Thinking about the issues facing Canada today, which one would you say the Government of Canada should focus on most?"*

	Fall 1998 %	Winter 1999 %	Spring 1999 %	Fall 1999 %
<b>Social</b>	30	43	42	42
<b>Economic</b>	42	37	36	34

	Winter 2000 %	Spring 2000 %	Fall 2000 %	Winter 2001 %
<b>Social</b>	54	54	51	59
<b>Economic</b>	33	30	28	29



- Although social issues have taken precedence over economic issues nationally since 1999, emphasis on individual issues varies across the country.

## Issues of Most Concern: Regional Variations

*“Thinking about the issues facing Canada today, which one would you say the Government of Canada should focus on most over the next five years?”*

	Atlantic %	Quebec %	Ontario %	Manitoba %	Sask. %	Alberta %	B.C. %	Canada %
Health care	46	35	32	41	33	33	31	<b>34</b>
Education	8	6	12	6	6	7	6	<b>8</b>
Economy	3	8	7	4	7	6	7	<b>7</b>
Unemployment	14	9	5	4	8	3	8	<b>7</b>
Taxes	4	4	6	8	5	9	8	<b>6</b>
Debt	4	4	6	5	4	11	9	<b>6</b>
Environment	2	2	4	4	2	2	4	<b>3</b>
Poverty	4	9	6	4	2	4	2	<b>5</b>
Agriculture/ Farming	0	0	0	1	10	2	0	<b>1</b>



- While all Canadians are concerned about health care, with 34% of respondents citing it as their top priority, residents of Atlantic Canada, at 46%, are more concerned. Atlantic Canadians are also concerned about unemployment (14%).
- Residents of Quebec, Ontario and Manitoba are also mostly concerned about social issues. However, in Quebec, concern is higher than in the rest of Canada regarding poverty (9%) and unemployment (9%). In Ontario, concern about education (12%) and the environment (4%) are higher than the national average. And in Manitoba, social concerns are driven by concern over health care.
- Western Canadians (Saskatchewan, Alberta, and British Columbia), on the other hand, are more concerned than other Canadians about economic issues. In Alberta and British Columbia, this concern centres on the debt and taxes. In Saskatchewan people are preoccupied with farming issues (10%).

## Issues of Most Concern: By Demographic Group

*"Thinking about the issues facing Canada today, which one would you say the Government of Canada should focus on most over the next five years?"*

### By sex (%)

	Male	Female	Canada
Social	46	70	59
Economic	39	20	29

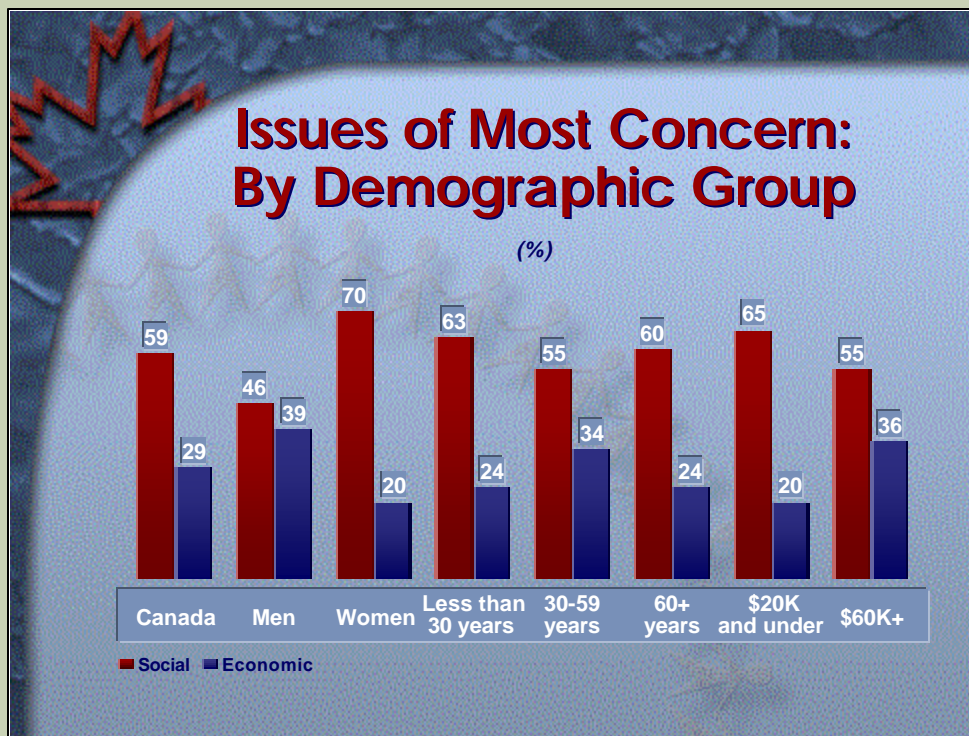
### By age (%)

	< 30	30-44	45-59	60 +	Canada
Social	63	57	54	60	59
Economic	24	33	34	24	29

### By income (%)

	< \$20K	\$20K to \$40K	\$40K to \$60K	\$60K +	Canada
Social	65	63	54	55	59
Economic	20	26	33	36	29





- There are also some interesting demographic variations regarding concern about social versus economic issues.
- Social issues are of greater concern for women, Canadians less than 30 years old or 60 and over, and those with lower incomes. Economic issues are more of a preoccupation for men, those aged 30-59 and those with higher incomes.

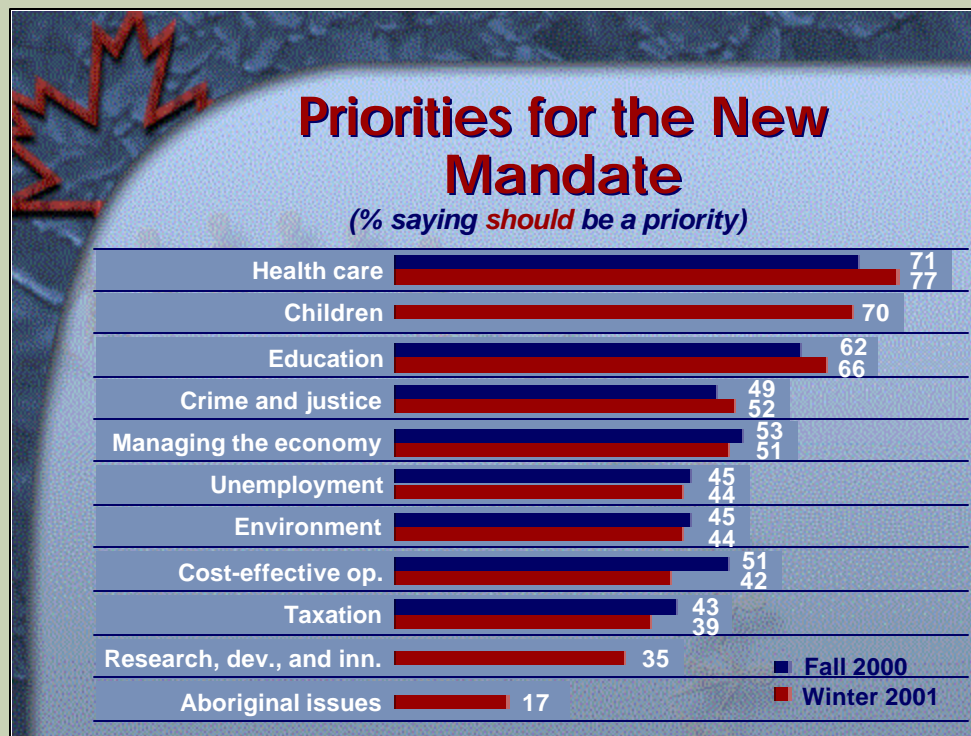
## Priorities for the New Mandate

*"I'm going to read you a series of two possible priority areas and I would like you to tell me which one you think should be given the highest priority by the Government of Canada during its new mandate."*

	Atlantic %	Quebec %	Ontario %	Manitoba %	Sask. %	Alberta %	B.C. %	Canada %
Health care	86	74	79	77	76	70	74	<b>77</b>
Children	70	78	70	59	62	66	66	<b>70</b>
Education	68	64	69	62	56	64	69	<b>66</b>
Crime and justice	54	53	53	47	55	56	46	<b>52</b>
Managing the economy	53	50	49	51	53	49	55	<b>51</b>
Unemployment	43	48	45	44	45	36	38	<b>44</b>
Environment	46	39	50	44	41	39	40	<b>44</b>
Cost-effective operations	35	32	41	47	45	54	53	<b>42</b>
Taxation	39	43	33	37	45	51	42	<b>39</b>
Research, development and innovation	29	40	32	40	36	33	33	<b>35</b>
Aboriginal issues	16	12	19	20	21	20	19	<b>17</b>

**Note on methodology:** We asked respondents which of two possible areas should be given the higher priority by the Government of Canada during its new mandate. We read them five pairs of priority issues and asked them to rank them. For example, we asked which should be given a higher priority by the Government of Canada: health care or taxation.

The average score for health care was 77% when offered as a choice against all other issues. The merit of this type of question is that it forces people to choose from among competing priorities. Consequently, it forces them to prioritize issues and demonstrates the significance of each issue compared to others.



- When we asked respondents to choose among possible priorities and identify which one the Government should focus on in its new mandate, social concerns, particularly health care, children, education and crime and justice, topped the agenda.
- A second layer of priorities emerged. These centred mostly on the economy and included economic management, unemployment the environment and taxation.
- Since fall 2000, concern about a number of social issues has risen, while it has declined for some key economic issues. The most significant decline, at the national level, is in the area of cost-effective operations, where concern has dropped 9%.

## Priorities and Perceptions for the New Mandate

"I'm going to read you a series of two possible priority areas and I would like you to tell me which one you think **should** be given the highest priority by the Government of Canada during its new mandate."

"Then I'd like you to tell me which of the two priorities you think **will** be given the highest priority."

	Should %	Will (ranking) %	Gap* %
Health care	77	65 (1)	12
Children	70	35 (9)	35
Education	66	47 (5)	19
Crime and justice	52	38 (8)	14
Managing the economy	51	64 (2)	-13
Unemployment	44	46 (6)	-2
Environment	44	31 (11)	13
Cost-effective operations	42	50 (4)	-8
Taxation	39	62 (3)	-23
Research, development and innovation	35	46 (7)	-11
Aboriginal issues	17	32 (10)	-15

**\*Gap calculation:** Percentage who think the Government **should** focus on an issue minus percentage who think the Government **will** focus on an issue.



- Having explored which issues Canadians believe the Government should give higher priority to, we asked to which issues they thought the Government would in fact assign higher priority.
- Although the top priorities of Canadians are social in nature (health care, children, education, and crime and justice), they believe the Government in its new mandate will focus, after health care, primarily on management of the economy and taxation. Generally, they expect the Government will take a stronger economic focus.
- The largest gaps between what Canadians desire and what they expect are in the areas of children's issues and taxation. Children's issues ranked second on Canadians' list of priorities; however people feel it will be much lower on the new government's priority list. (Note that this survey was conducted prior to the Speech from the Throne.) Conversely, while taxation ranked low on the list of priorities, Canadians believe it will be one of the Government's top priorities for the current mandate.

## Optimism: Future of the Country

*"Overall, thinking about the future of the country, how would you describe yourself?"*

### % saying optimistic

Fall 1998	Spring 1999	Fall 1999	Spring 2000	Fall 2000	Winter 2001
51	60	61	61	60	57

### By province

	Atlantic	Quebec	Ontario	Manitoba	Sask.	Alberta	B.C.	Canada
Pessimistic	14	13	11	16	18	16	22	14
Neither	29	33	25	33	30	23	28	28
Optimistic	55	54	63	50	51	60	47	57

### By sex

	Male	Female	Canada
Pessimistic	14	14	14
Neither	24	31	28
Optimistic	60	53	57

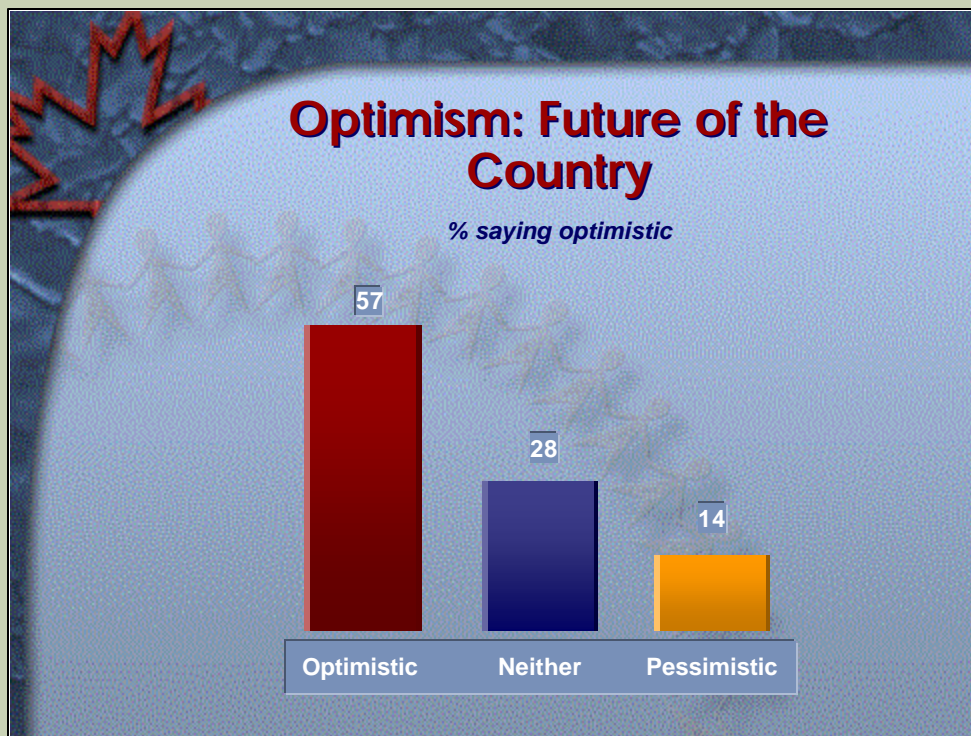
### By income (in \$000)

	< \$20K	\$20K to \$40K	\$40K to \$60K	\$60K +	Canada
Pessimistic	15	16	15	11	14
Neither	36	32	25	21	28
Optimistic	46	51	60	68	57

### By education

	< High school	High school	Post-secondary	University Degree	Canada
Pessimistic	17	17	16	10	14
Neither	42	33	28	18	28
Optimistic	38	49	56	72	57





- Given the recent speculation about an economic slowdown, the CIO's winter 2001 survey asked respondents how they felt about the future of the country. Optimism is quite high at 57%. Moreover, it has remained relatively stable since spring 1999.
- The feeling of optimism is highest amongst those with a university degree (72%), those with higher household incomes (68%), residents of Ontario (63%) and men (60%).

## Optimism: Personal Future

“Overall, thinking about your own economic future in the next twelve months, do you think it will get much better, slightly better, remain the same, worsen slightly or worsen a lot?”

### By province (%)

	Atlantic	Quebec	Ontario	Manitoba	Sask.	Alberta	B.C.	Canada
Better	28	39	34	33	31	43	39	36
Same	54	47	49	49	46	35	39	46
Worsen	17	13	16	18	22	22	22	17

### By sex (%)

	Male	Female
Better	41	31
Same	42	51
Worsen	17	17

### By age (%)

	< 30	30-44	45-59	60 +
Better	50	43	30	18
Same	38	43	49	57
Worsen	11	14	21	24

### By education (%)

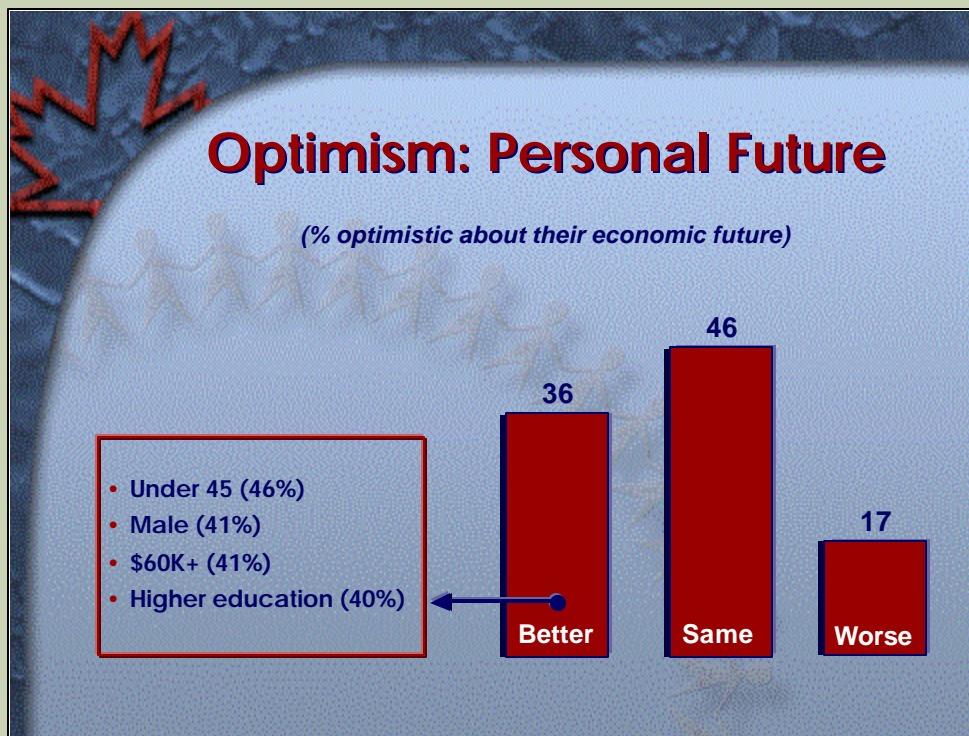
	< High school	High school	Post-secondary	University Degree
Better	29	32	39	41
Same	48	49	42	47
Worsen	22	18	18	11

### By employment status (%)

	Employed	Unemployed	Not in the workforce
Better	43	46	22
Same	41	45	56
Worsen	16	9	21

### By income (in \$000)

	< \$20K	\$20K to \$40K	\$40K to \$60K	\$60K +
Better	35	35	37	41
Same	45	50	45	44
Worsen	19	14	17	15



- Moreover, the economic outlook of Canadians is positive. This positive outlook anchors their current priorities and expectations. Eighty-two per cent of respondents believe their current economic situation will improve or remain the same over the next 12 months. Only 17% believe it will get worse.
- Those most likely to think their economic prospects will improve are those under 45, men, higher income earners and those with higher education.
- Those most likely to think their economic situation will worsen are the elderly (24%), those who are not in the workforce (21%) and those with lower levels of education (22%).

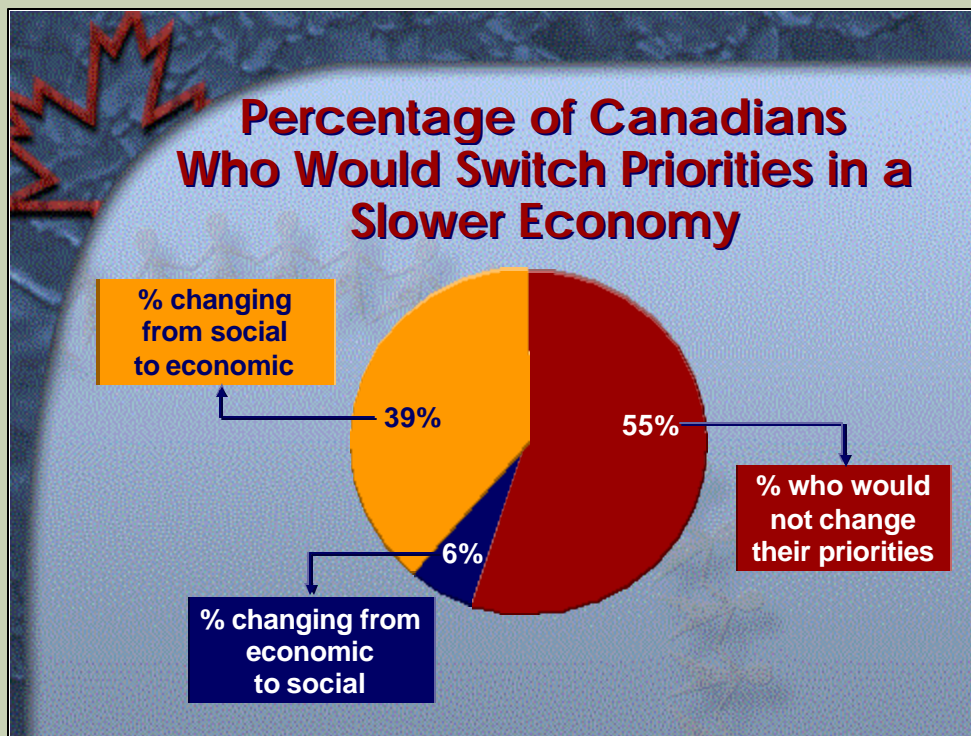
## Percentage of Canadians Who Would Switch Priorities in a Slower Economy

*“Consider for a moment now that there is a slowdown in the national economy. In such an environment, what issue would you say the Government of Canada should focus on most?”*  
(Unprompted)

*“Consider for a moment now that the economy was to grow stronger. In such an environment, what issue would you say the Government of Canada should focus on most?”* (Unprompted)

### How the index was created:

Index	<i>“Thinking about the issues facing Canada today, which one would you say the Government of Canada should focus on most over the next 5 years?”</i>		<i>“Consider for a moment now that there is a slowdown in the national economy. In such an environment, what issue would you say the Government of Canada should focus on most?”</i>
<b>Social to economic</b>	Social issues	→ → →	Economic issues
<b>Economic to social</b>	Economic issues	→ → →	Social issues
<b>Same</b>	Social issues	→ → →	Social issues
	Economic issues	→ → →	Economic issues



- We went on to ask respondents about their priorities in the event of either an improving economy or a slowing economy. Should there be an economic change in either direction, a majority of Canadians say they would not change their priority.
- However, in an economic downturn, Canadians would place less emphasis on social issues. Indeed, 39% would change their priority from social to economic.

## Switching Priorities in a Slower Economy

*“Consider for a moment now that there is a slowdown in the national economy. In such an environment, what issue would you say the Government of Canada should focus on most?”*  
(Unprompted)

### % shifting priorities from social to economic

#### By province

	Atl.	Que.	Ont.	Man.	Sask.	Alta.	B.C.	Canada
Social to economic	39	39	42	43	38	34	31	<b>39</b>
Economic to social	6	8	4	2	5	6	8	<b>6</b>
Same	55	53	54	55	56	59	61	<b>55</b>

#### By sex

	Male	Female
Social to economic	36	41
Economic to social	5	6
Same	59	52

#### By age

	< 30	30-44	45-59	60 +
Social to economic	45	37	35	42
Economic to social	7	5	7	5
Same	48	59	58	54

### Those who are currently concerned with economic issues (%):

#### By province

	Atl.	Que.	Ont.	Man.	Sask.	Alta.	B.C.	Canada
Social	65	59	61	65	51	52	50	<b>59</b>
Economic	26	28	28	24	35	33	36	<b>29</b>
Other	9	13	11	11	13	14	13	<b>12</b>

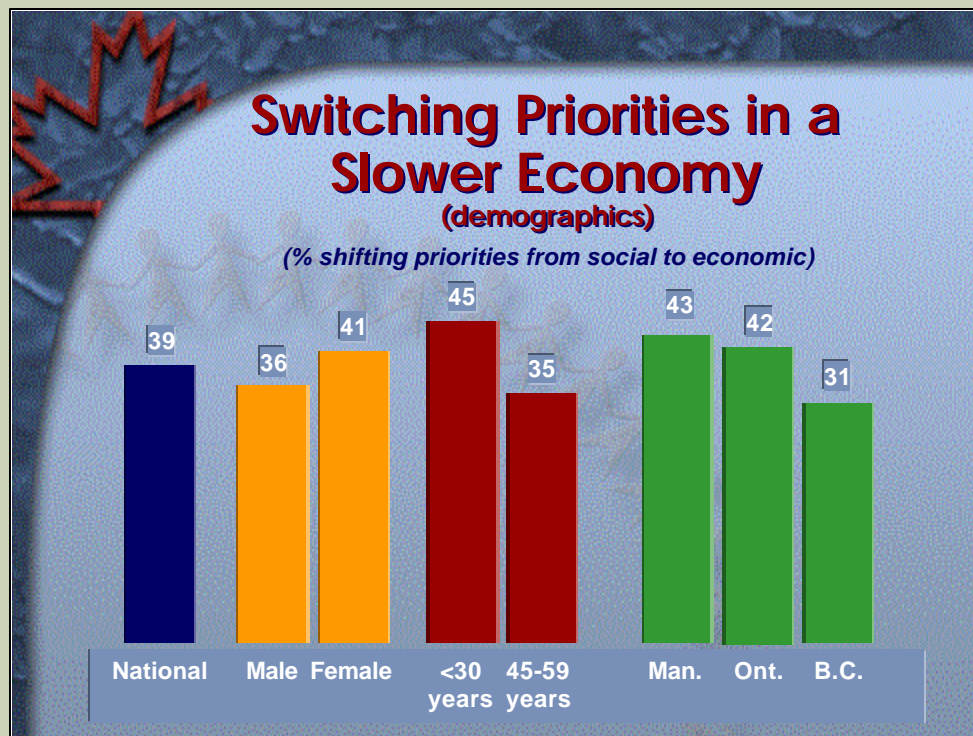
#### By sex

	Male	Female
Social	46	70
Economic	39	20
Other	14	10

#### By age

	< 30	30-44	45-59	60 +
Social	63	57	54	60
Economic	24	33	34	24
Other	13	9	12	16





- Canadians most willing to switch their priority from social to economic in a slowdown tend to be those under 30 years of age, residents of Manitoba and Ontario and females.
- Males, those 45-59, and residents of British Columbia are already preoccupied with economic issues.

## Priorities in the Event of Economic Change

*“Consider for a moment now that there is a slowdown in the national economy. In such an environment, what issue would you say the Government of Canada should focus on most?”*  
(Unprompted)

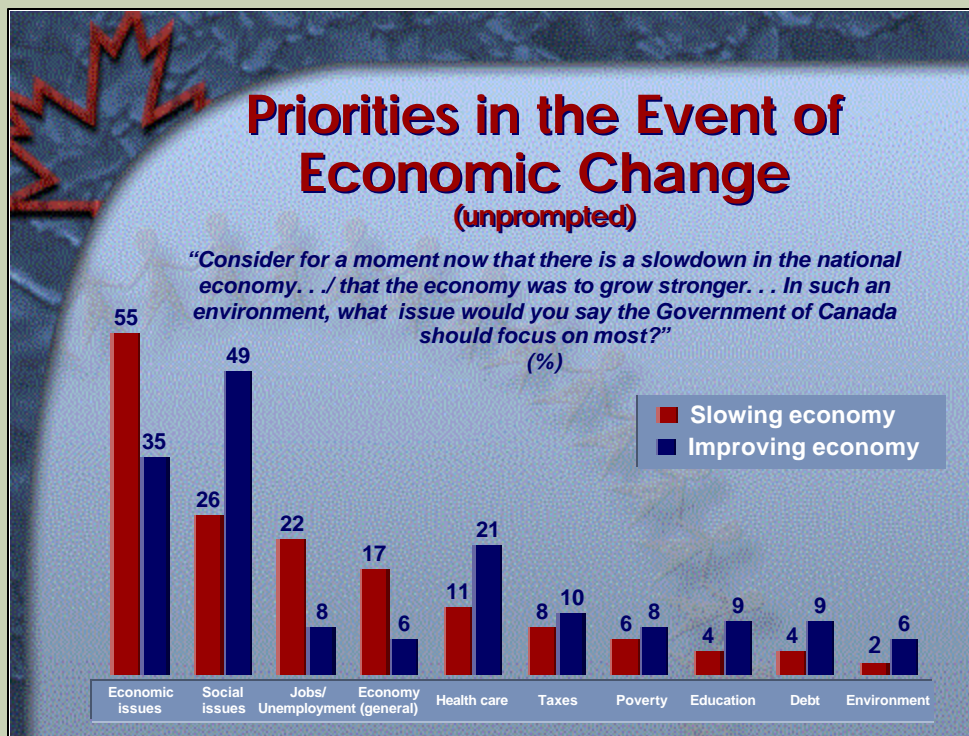
*“Consider for a moment now that the economy was to grow stronger. In such an environment, what issue would you say the Government of Canada should focus on most?”* (Unprompted)

### Priorities in slow economy, by province (%)

	Atl.	Que.	Ont.	Man.	Sask.	Alta.	B.C.	Canada
Jobs/unemployment	30	23	22	17	22	21	15	22
Economy	13	13	19	18	20	14	20	17
Health care	18	12	9	15	12	11	12	11
Taxes	3	7	8	5	6	14	13	8
Poverty	3	11	5	1	2	3	4	6
Education	4	2	4	3	3	7	3	4
Debt	3	2	5	6	5	7	5	4
Environment	2	2	1	3	1	1	2	2

### Priorities in an improving economy, by province (%)

	Atl.	Que.	Ont.	Man.	Sask.	Alta.	B.C.	Canada
Jobs/unemployment	14	10	7	4	11	5	8	8
Economy	4	7	7	6	10	4	3	6
Health care	31	18	20	21	20	14	23	21
Taxes	7	8	8	9	8	19	14	10
Poverty	4	14	7	4	5	3	6	8
Education	9	5	12	10	6	11	7	9
Debt	5	4	11	9	6	11	12	9
Environment	6	5	6	7	2	6	7	6



- In the event of a downturn, overall, the majority of Canadians (55%) believe the Government of Canada should focus on economic issues. Just one-quarter of all respondents (26%) identified social issues as continuing to be the single most important priority.
- Looking more closely at how priorities would change in the event of a slowdown, our data indicate that Canadians would become more concerned with jobs, unemployment and the economy, and less concerned with health care and education.
- However, if the economy remains the same or improves, the priorities of Canadians will remain relatively stable, and health care will continue to be the main priority.

## Familiarity with Recent Initiatives (Unprompted)

*“Now I’d like you to think about some recent programs, services or initiatives from the Government of Canada. Please identify the one you have recently heard about.”*

BY SEX	Male %	Female %	Canada %
Health care	4	7	6
Education	5	4	5
Taxes	7	4	5

BY AGE	< 30 %	30-44 %	45-59 %	60 + %	Canada %
Health care	3	8	5	7	6
Education	8	5	4	3	5
Taxes	2	7	7	5	5

BY INCOME	< \$20K %	\$20K to \$40K %	\$40 to \$60K %	\$60K + %	Canada %
Health care	7	5	8	5	6
Education	5	5	4	6	5
Taxes	1	4	6	9	5

BY EDUCATION	< High school %	High school %	Post-secondary %	University degree %	Canada %
Health care	8	6	6	5	6
Education	4	4	4	6	5
Taxes	2	5	5	9	5

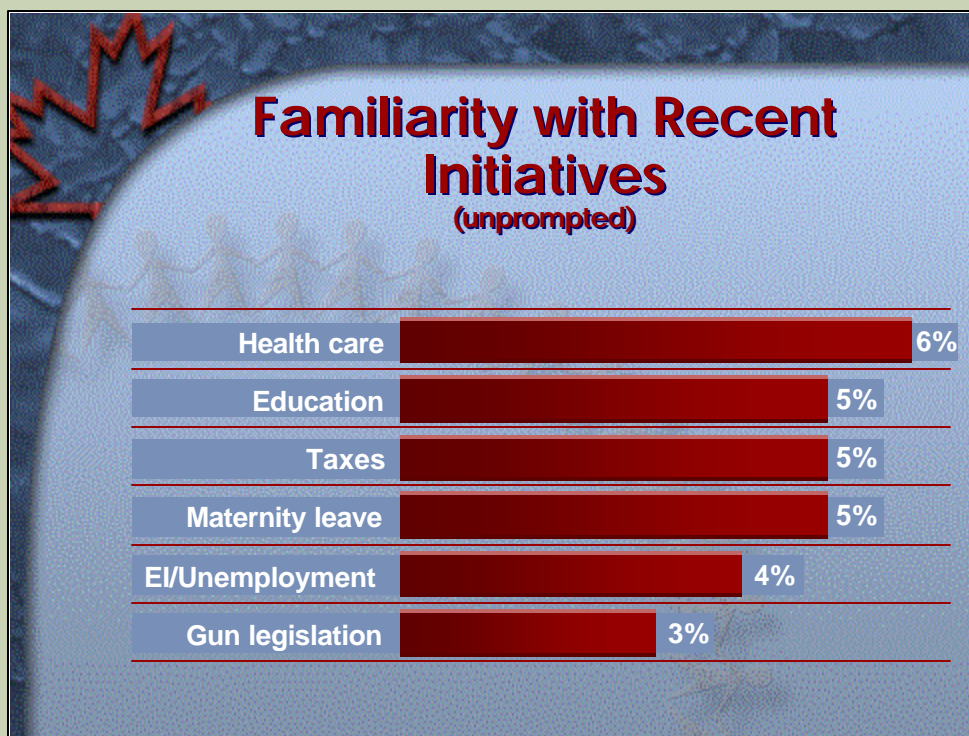
## Characteristics of Those Who Listed Health Care, Education or Taxes as a Priority

BY SEX	Male %	Female %	Canada %
Health care	74	79	77
Education	68	65	66
Taxes	44	35	39

BY AGE	< 30 %	30-44 %	45-59 %	60 + %	Canada %
Health care	76	78	78	74	77
Education	70	70	61	63	66
Taxes	35	44	40	36	39

BY INCOME	< \$20K %	\$20K to \$40K %	\$40K to \$60K %	\$60K + %	Canada %
Health care	75	75	80	77	77
Education	65	65	63	71	66
Taxes	38	36	42	44	39

BY EDUCATION	< High school %	High school %	Post-secondary %	University Degree %	Canada %
Health care	76	78	79	73	77
Education	64	65	65	71	66
Taxes	37	38	41	40	39



- The winter 2001 communications survey examined in detail what programs, services or initiatives Canadians had most recently heard about.
- What emerged is that Canadians appear to be focusing on the messages about issues that concern them, particularly with regard to health care, taxes and education. For example, familiarity with health care initiatives is higher among women, those between the ages of 30 and 44, and middle income Canadians. These are the people who are likely to indicate that health care is a priority (see preceding page).
- With regard to taxes, familiarity is higher among men, those who are 30-59 and those who have higher annual incomes. Again, these are the people who list taxes as an important issue. Similar patterns exist regarding familiarity with education initiatives. This relationship between priorities and recall underscores the importance of targeting communication efforts.
- Awareness of particular initiatives varies across the country. For example, residents of Nova Scotia (7%) and Alberta (6%) are more familiar than other Canadians with firearms legislation; residents of Saskatchewan (9%) are more familiar with tax initiatives; while residents of Quebec (8%) are more familiar with education initiatives.

## Sources of Information

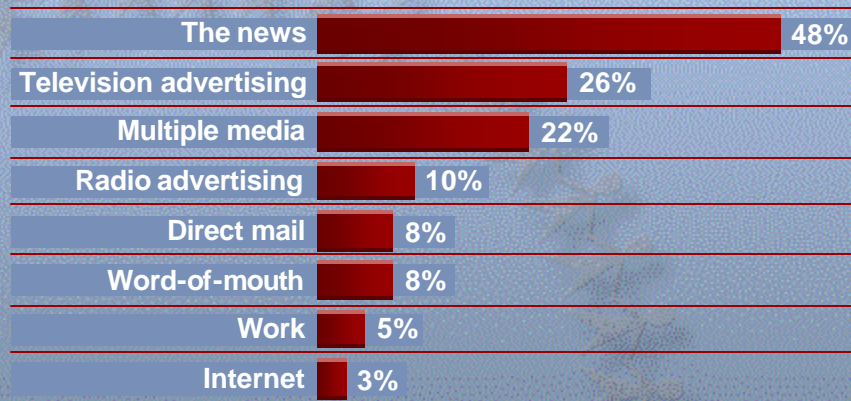
*“And where did you hear about this program, service or initiative?”*

	Overall Familiarity %	News Media %	Television Advertising %
Health care	6	14	16
Education	5	7	8
Taxes	5	11	15
Maternity Leave	5	7	17
EI/unemployment	4	6	7
Gun legislation	3	9	--



## Sources of Information

*"And where did you hear about this program, service or initiative?"*



- Almost one in two Canadians who had recently heard about a government initiative had received this information from the news (broadcast and print). Television advertising was the second most frequent source at 26%. Interestingly, 22% of Canadians had heard about a recent government initiative through multiple (two or more) media sources.
- Television advertising was most frequently identified as the source of information for health care, taxes and maternity leave. The news media were also frequently cited as the source of information for health care, taxes and the recent firearms legislation (Bill C-69).

## Lack of Familiarity with Recent Initiatives: By Socio-economic Characteristic

*“Now I’d like you to think about some recent programs, services or initiatives from the Government of Canada. Please identify the one you have most recently heard about.”*

### By education (%)

Response	< High school %	High school %	Post- secondary %	University degree %	Canada %
Don't know	62	54	49	41	51

### By labour force status (%)

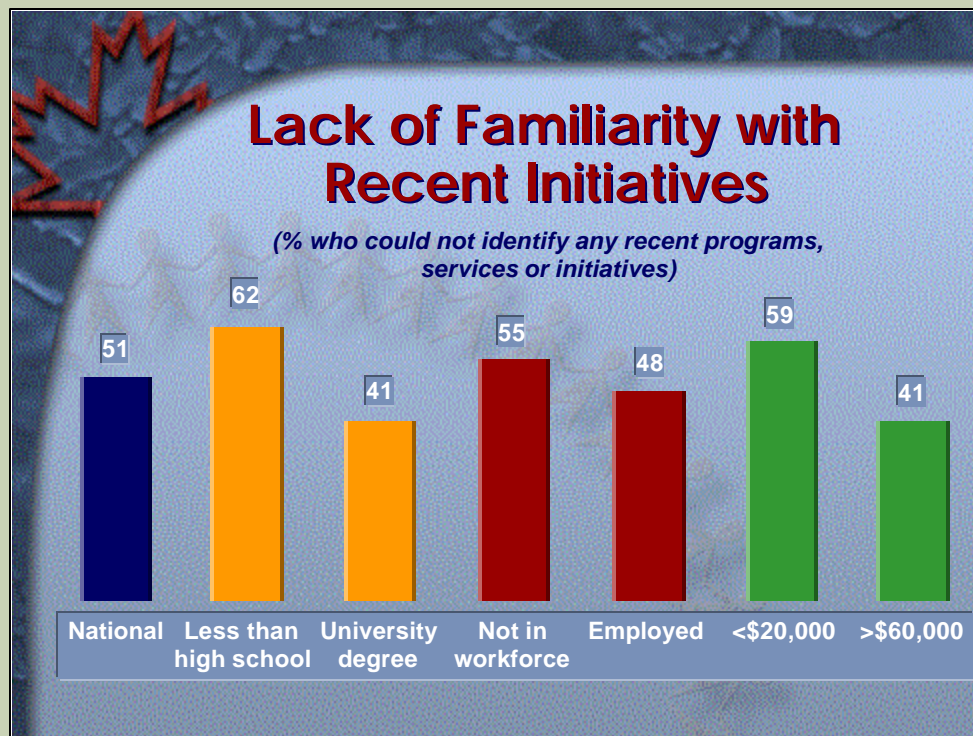
Response	Employed %	Unemployed %	Not in labour force %	Canada %
Don't know	48	53	55	51

### By household income (%)

Response	< \$20K %	\$20K to \$40K %	\$40K to \$60K %	\$60K + %	Canada %
Don't know	59	56	46	41	51

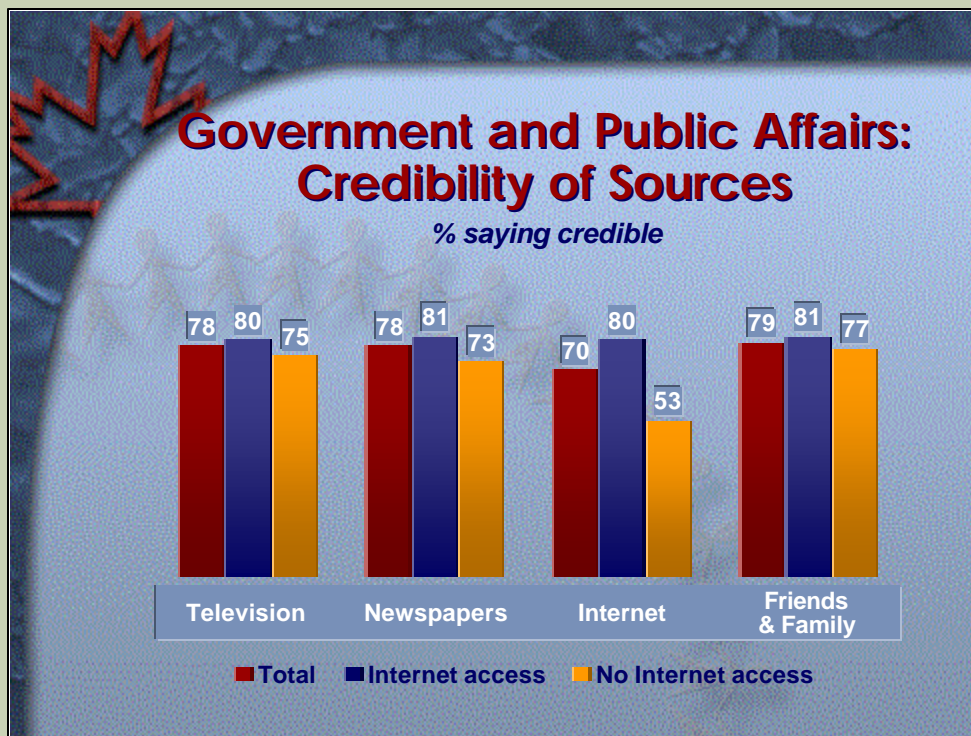
### By province (%)

Response	Atl. %	Que. %	Ont. %	Man. %	Sask. %	Alta. %	B.C. %	Canada %
Don't know	55	47	52	57	55	48	51	51



- There continues to be a segment of the population the Government has trouble reaching. Those who are least aware of recent programs, services or initiatives tend to have less than a high school education, not to be in the workforce, and to make less than \$20,000 per year. These are also the people who are more likely to have low literacy skills.





- When we asked Canadians to consider the credibility of various sources of information regarding government and public affairs issues, all sources of information received high rankings (in excess of 70%).
- While the Internet received the lowest rating of all four sources, it is interesting to note that those who have access rate the Internet as a credible source of information on government and public affairs issues.

## Level of Contact with the Government of Canada for Information or Assistance

*“In the past three months, approximately how often have you had contact with the Government of Canada for information or assistance?”*

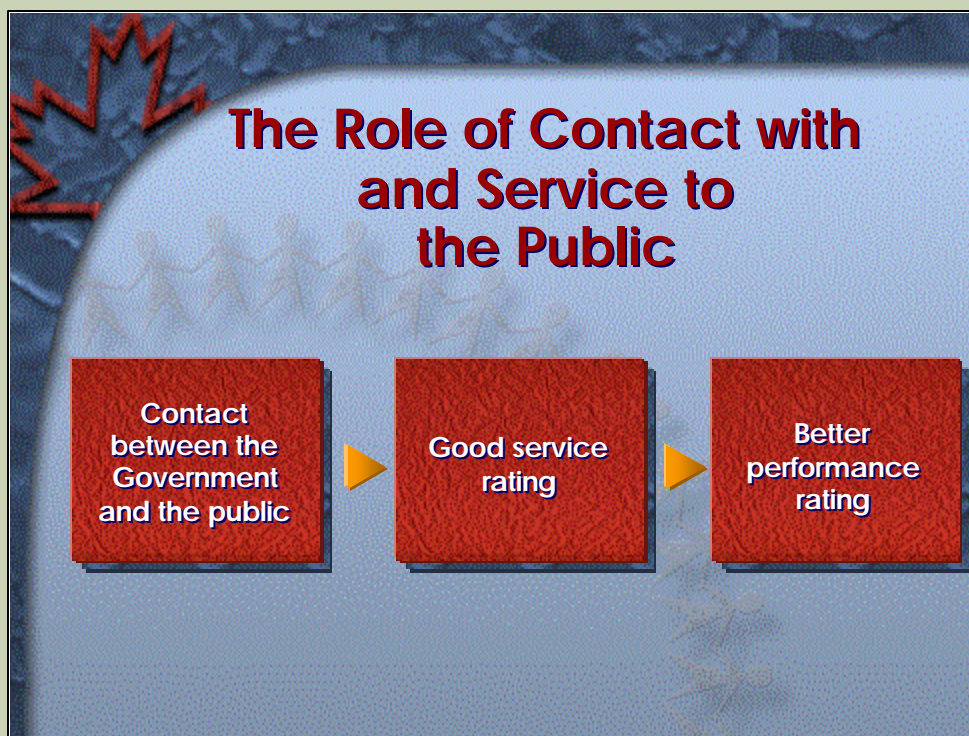
### By level of education

Response	< High school %	High school %	Post-secondary %	University degree %	Canada %
Never	78	70	61	55	<b>63</b>
1-2 times	13	19	25	27	<b>23</b>
3 or more	8	10	13	18	<b>14</b>
Total	100	100	100	100	<b>100</b>

*“How did you contact the Government to get this service?”*

### By level of education

Response	< High school %	High school %	Post-secondary %	University degree %	Canada %
Telephone	72	70	68	64	<b>67</b>
Internet	7	11	22	32	<b>22</b>
In person	12	16	12	12	<b>13</b>
Mail	17	10	9	9	<b>10</b>
Other	12	5	4	4	<b>5</b>



- Contact with and service to the public are crucial elements of the relationship between the Government of Canada and citizens. Past research by the Canada Information Office (*Listening to Canadians* Fall 2000) has shown a link between satisfaction with service received and overall satisfaction with the Government's performance. The winter 2001 survey reaffirms this relationship.
- Satisfaction with service received is important, moreover, because of the large number of Canadians who have direct contact with the Government. Over one-third (37%) of the Canadian adult population contacted the Government during the three months leading up to the January 2001 survey (see preceding page). The bulk of these contacts were made by telephone (67%), although a significant number (22%) were made through the Internet.
- Both the frequency of contact with the Government and method of contact vary on the basis of education (see preceding page). While only one in five Canadians (21%) with less than high school education contacted the Government during these three months, almost half (45%) of those with university degrees did so. Canadians with post-secondary education were also much more likely to use the Internet to contact the Government and less likely to visit in person. Education is more strongly related to contact with the Government than other demographic characteristics such as income, age, gender or language.



## Satisfaction with Service or Information Received

*“And how do you rate the overall quality of the service or information you received? Please use a 7-point scale where 1 means very poor, 7 means very good, and 4 means neither good nor poor.”*

### By province or region

	Atlantic %	Quebec %	Ontario %	Man. %	Sask. %	Alberta %	B.C. %	Canada %
Good (5,6,7)	61	62	61	67	70	58	61	<b>62</b>
Neither (4)	21	20	16	12	15	19	15	<b>17</b>
Poor (1,2,3)	17	16	23	20	14	21	21	<b>20</b>

### By education

Response	< High school %	High school %	Post-secondary %	University degree %	Total, Canada %
Good (5,6,7)	57	60	62	64	<b>62</b>
Neither (4)	26	19	15	17	<b>17</b>
Poor (1,2,3)	17	19	21	20	<b>20</b>

### By gender

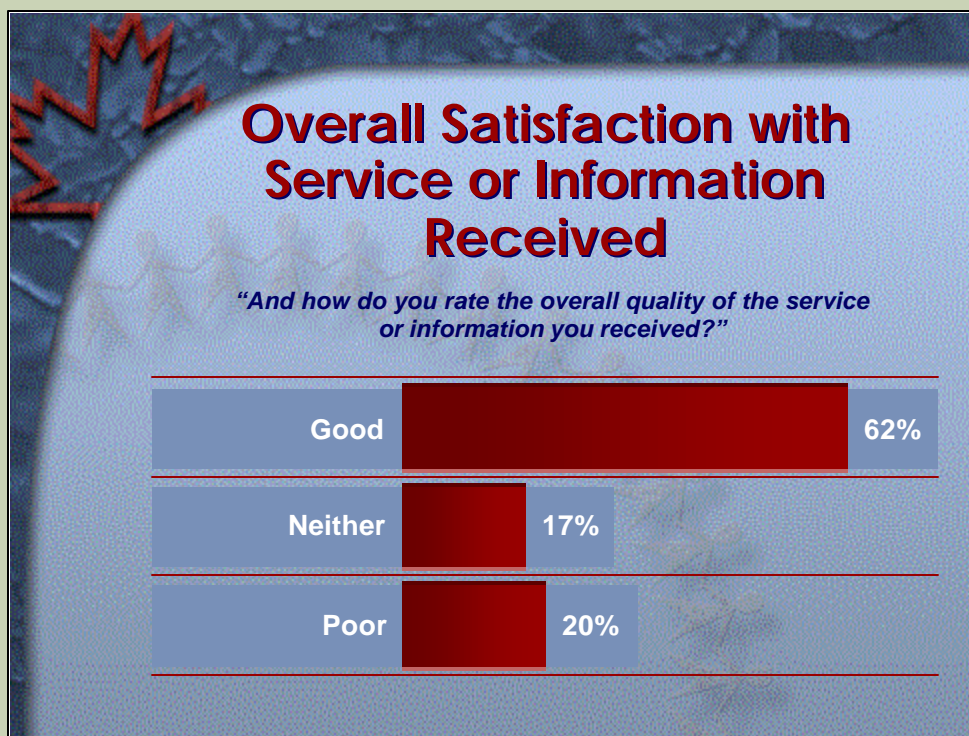
Response	Men %	Women %	Total, Canada %
Good (5,6,7)	60	63	<b>62</b>
Neither (4)	19	16	<b>17</b>
Poor (1,2,3)	20	20	<b>20</b>

### By age

Response	18-29 %	30-44 %	45-59 %	60 + %	Total, Canada %
Good (5,6,7)	64	60	61	63	<b>62</b>
Neither (4)	14	18	18	20	<b>17</b>
Poor (1,2,3)	20	22	19	16	<b>20</b>

### By income (in \$000)

Response	< \$20K %	\$20K to \$40K %	\$40K to \$60K %	\$60K + %	Total, Canada %
Good (5,6,7)	63	62	60	63	<b>62</b>
Neither (4)	20	17	16	17	<b>17</b>
Poor (1,2,3)	16	19	23	19	<b>20</b>



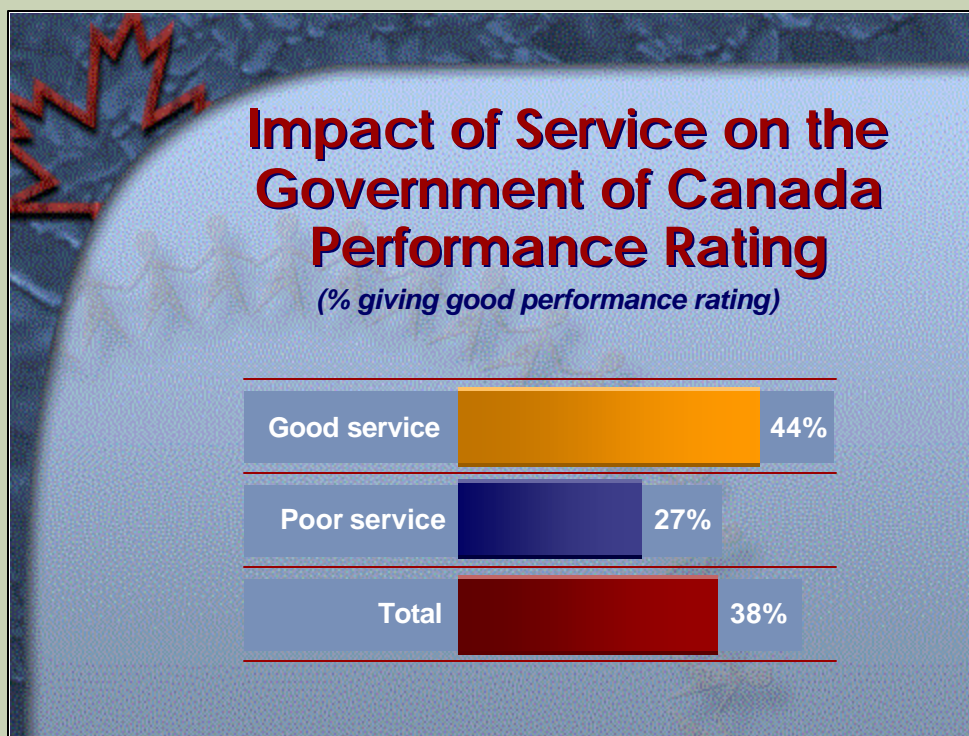
- Over six in ten (62%) Canadians give the Government a good rating for quality of service and information received while only one fifth (20%) give it a poor rating.
- Moreover, there is uniformly high satisfaction all across the country and across the Canadian social fabric (see preceding page). The Government's performance ratings are high in all regions, among all education levels, among both men and women, among all age groups and among all income categories.
- Notably, there is little variation in ratings according to education. Even though Canadians with less than high-school education are less likely to contact the Government than university graduates, once they make contact, they are only slightly less likely than other Canadians to be satisfied with the service or information received.

## Impact of Service on Government Performance

*“Generally speaking, how would you rate the performance of the Government of Canada? Please use a 7-point scale where 1 is terrible, 7 is excellent, and the mid-point is neither good nor bad.”*

*“And how do you rate the overall quality of the service or information you received? Please use a 7-point scale where 1 means very poor, 7 means very good, and 4 means neither good nor poor.”*

Rating of overall performance	Poor quality of service/ information (1,2,3) %	Neutral quality of service/ information (4) %	Good quality of service/ information (5,6,7) %	Total, Canada %
Good (5,6,7)	27	37	44	38
Neutral (4)	29	28	30	30
Poor (1,2,3)	44	35	26	31
Total	100	100	100	100



- Satisfaction with service or information received is strongly related to satisfaction with the Government's overall performance. While 38% of Canadians as a whole gave the Government a good rating for overall performance, 44% of those who had had a positive contact with the Government did so.
- On the other hand, of those who had had a negative contact, only 27% gave the Government a good rating. Poor performance ratings were much higher among those who had had a negative experience (see preceding page).
- The relationship between service rating and overall performance rating remained strong even when demographic characteristics such as education, income, age, gender and language were taken into account.

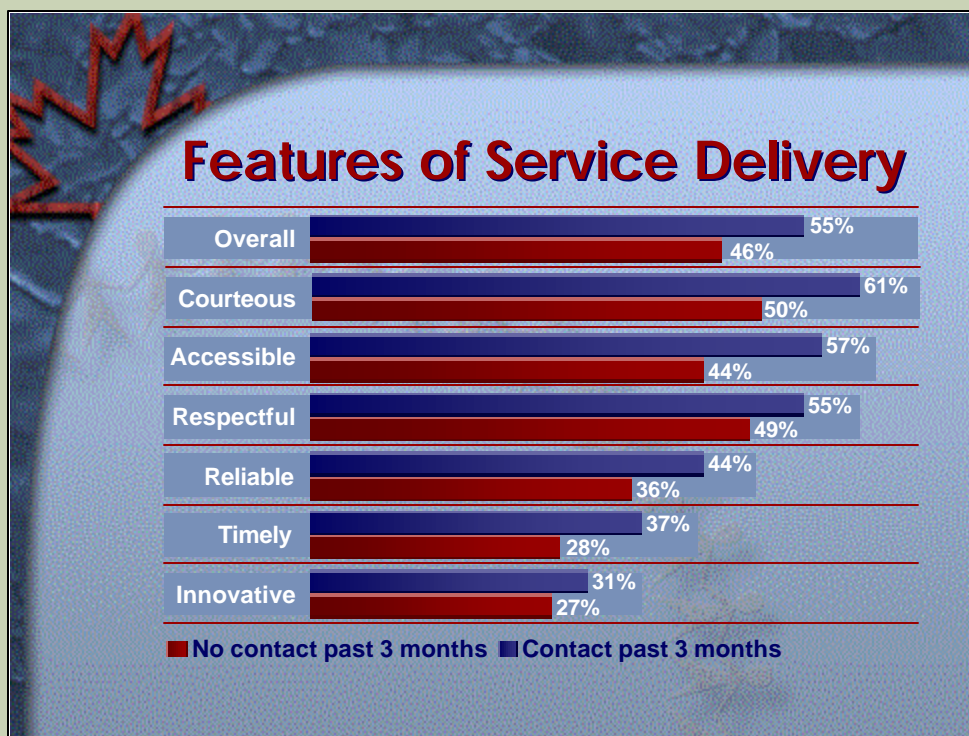
## Features of the Service Delivery of the Government of Canada

*“Based on your experience or impressions, how would you rate the Government of Canada on the following dimensions of service delivery? In terms of being . . .”*

Attribute	Poor (1,2,3) %	Neutral (4) %	Good (5,6,7) %	Total %
Overall quality of service	18	30	50	100
Courteous	19	26	52	100
Respectful	21	27	49	100
Accessible	24	25	47	100
Reliable	29	31	38	100
Timely	33	33	30	100
Innovative	33	36	28	100

### Percentage Giving Good Rating for Overall Service Delivery Among Those Who Gave “Good” Ratings to Selected Attributes of Service Delivery

Attribute	Rating	Rating for overall service: Poor (1,2,3) %	Rating for overall service: Neutral (4) %	Rating for overall service: Good (5,6,7) %
Reliable	Good (5,6,7)	3	13	84
Accessible	Good (5,6,7)	5	19	76
Courteous	Good (5,6,7)	5	22	73
Timely	Good (5,6,7)	3	12	85
Innovative	Good (5,6,7)	4	12	84
Respectful	Good (5,6,7)	5	18	77



- We asked survey respondents to rate their impressions of overall government service and various features of government service delivery. The overall level of service gets a good rating from 50% of Canadians. The highest rated elements are courteousness, accessibility and respectfulness. The lowest are innovation and timeliness.
- There is a strong relationship between contacting the Government and rating government services. Those who had contacted the Government in the previous three months were more likely to rate all aspects of service delivery more positively than those who had not. Contact with the Government for information or services may, therefore, have a positive impact on the perception of government service delivery.
- The rating for all six attributes of service is strongly related to overall service rating. For example, 84% of those who give the Government a good rating for reliability give it a good rating for overall service; only 3% give it a poor overall service rating.

## Rating Government of Canada Service

*“Based on your experience or impressions, how would you rate the Government of Canada on the following dimensions of service delivery? In terms of being . . .”*

### % saying “good” (5,6,7) rating

Attribute	Atl. %	Que. %	Ont. %	Man. %	Sask. %	Alta. %	B.C. %	Total %
Overall quality of service	53	51	56	39	45	45	38	50
Courteous	54	54	54	43	53	47	47	52
Respectful	49	49	53	37	46	50	44	49
Accessible	50	44	49	37	41	47	44	47
Reliable	33	42	45	25	31	31	26	38
Timely	29	29	33	24	23	27	27	30
Innovative	37	30	28	21	26	27	17	28

### By gender

Attribute	Men %	Women %	Total, Canada %
Overall quality of service	51	49	50
Courteous	52	52	52
Respectful	51	48	49
Accessible	48	45	47
Reliable	41	35	38
Timely	32	28	30
Innovative	28	27	28

### By education

Attribute	<High School %	High School %	Post-secondary %	University degree %	Total Canada %
Overall quality of service	48	46	52	53	50
Courteous	47	49	56	54	52
Respectful	42	48	53	52	49
Accessible	42	42	48	53	47
Reliable	37	32	38	45	38
Timely	29	26	33	31	30
Innovative	29	28	27	27	28



## Demographic and Regional Profiles: Attitudes Toward Government Service to the Public

### University degree and post-secondary education

- Higher levels of contact
- Use telephone and Internet to contact
- High satisfaction with service

### Men

- High satisfaction with service received
- Believe service is reliable

### Atlantic

- High satisfaction with service received
- Most likely to believe service is innovative

### Ontario

- Most positive attitudes toward government service
- Believe government service is reliable

### Saskatchewan

- Positive experiences with service
- Negatives include reliability and timeliness

### British Columbia

- Positive experiences with government service
- Generally negative beliefs about service

### High school or less

- Lower levels of contact
- Use telephone, mail, in-person visits to contact
- High satisfaction with service

### Women

- High satisfaction with service
- Less positive about reliability

### Manitoba

- Positive experiences with service
- Least positive about government service in general and less positive attitudes about courtesy, reliability, timeliness, and innovation

### Alberta

- Positive experiences with service
- Less positive about government
- Reliability is negative

## Service Rating by Method of Contact

*“And how do you rate the overall quality of the service or information you received? Please use a 7-point scale where 1 means very poor, 7 means very good, and 4 means neither good nor poor.”*

Rating of quality of service/ information	Mail %	Telephone %	In person %	Internet %	All Methods %
Good (5,6,7)	52	58	73	73	62
Neutral (4)	27	17	16	13	17
Poor (1,2,3)	16	24	6	14	20
Refused/ Don't know	5	1	5	--	2
Total	100	100	100	100	100



- Canadians who contacted the Government for service or information through the Internet or in person gave a higher rating for service or information quality than those who used the telephone or the mail. This relationship remains strong even when demographic characteristics such as education, income, age, gender and language are taken into account.
- These results suggest that the Internet may have a positive long-term impact on the Government's ratings for delivery of service and information to the public.

## Internet Access and Recent Contact with the Government of Canada: By Region/Province and Demographic Characteristic

*"In the past three months, approximately how often have you had contact with the Government of Canada for information or assistance?" AND "Do you have access to the Internet?"*

Region/Province Demographic Characteristic	Contacted the Government of Canada %	Internet Access %
<b>Province/Region</b>		
Atlantic	32	54
Quebec	30	52
Ontario	40	70
Manitoba	32	57
Saskatchewan	33	56
Alberta	38	67
British Columbia	41	73
<b>Education</b>		
< High school	22	28
High school	32	52
Post-secondary	39	72
University degree	45	82
<b>Age</b>		
18 to 29	42	77
30 to 44	42	73
45 to 59	35	67
60 and over	25	31
<b>Income</b>		
< \$20K	36	36
\$20K to \$40K	32	50
\$40K to \$60K	38	70
\$60K +	42	86
<b>Total, Canada</b>	<b>37</b>	<b>63</b>

### Guide to levels in the grid on the opposite page

#### Contact with the Government

High: over 45% have contacted the Government

Medium: 30% to 45% have contacted the Government

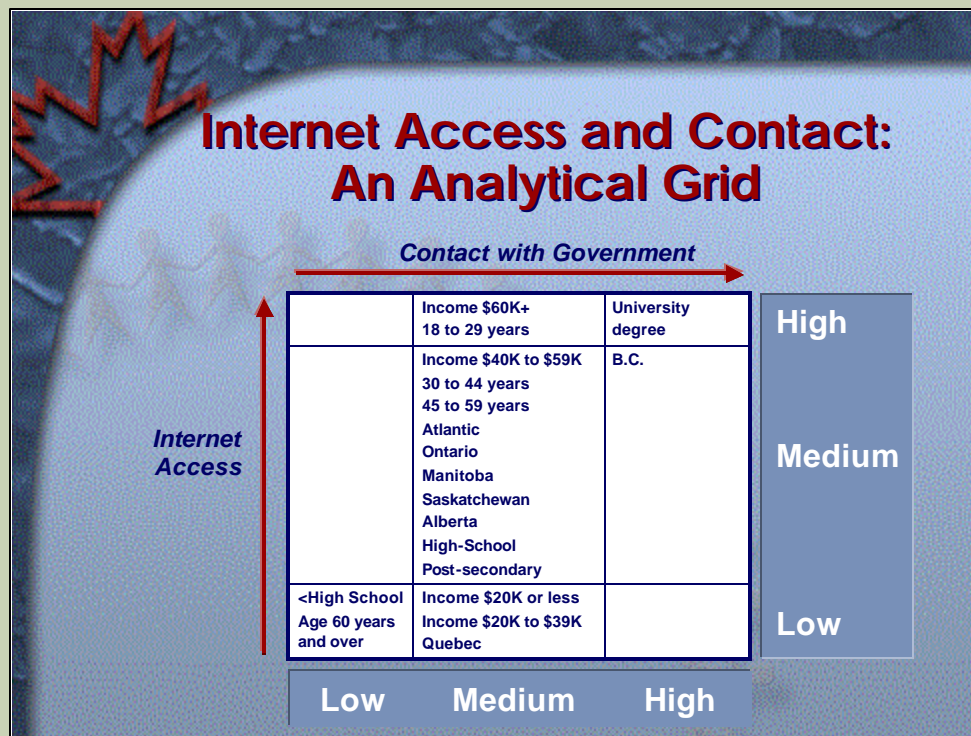
Low: less than 30% have contacted the Government

#### Internet Access

High: over 75% have Internet access

Medium: 50% to 75% have Internet access

Low: less than 50% have Internet access



- The above grid suggests that Canadians with university education, who are the most likely to have contact with the Government and to have high rates of Internet access, will be relatively easier to communicate with and serve in the Internet age. Canadians with community college, some university or completed high school education have levels of contact and Internet usage close to the national average.
- Canadians aged 60 and over and persons with less than high school education may be the most difficult for governments to communicate with and serve in the Internet age, since both groups have relatively lower levels of Internet access and rates of contact with government.

## Access to the Internet: Fall 2000 and Winter 2001 Total: By Education, Age and Province/Region

Response to "Do you have access to the Internet?"

### By education: % responding "yes"

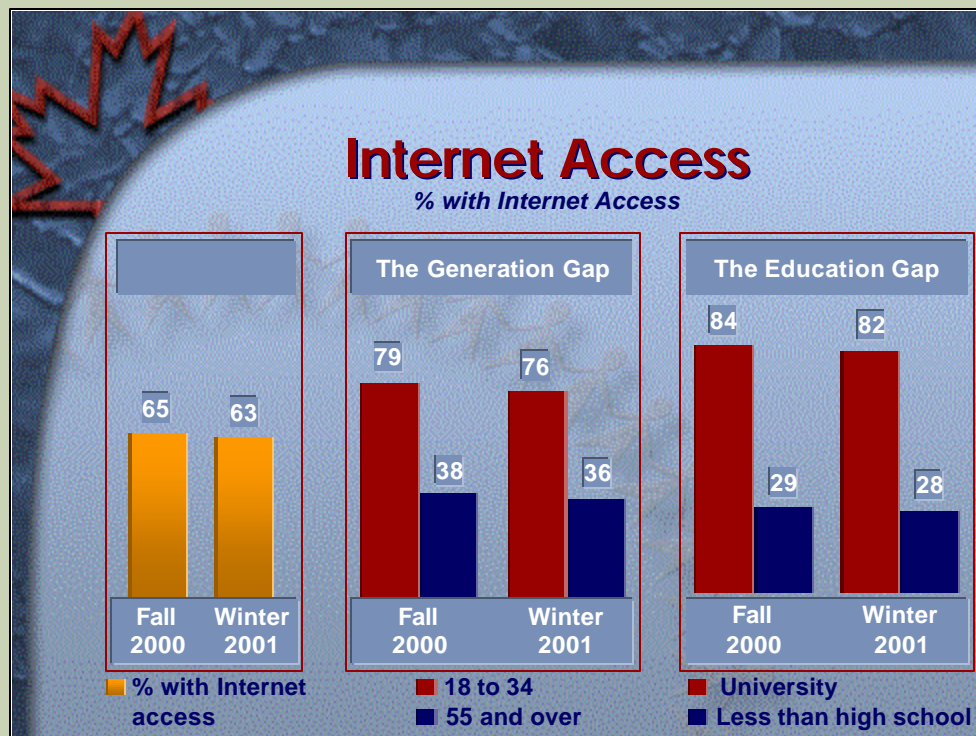
Level of Education	Fall 2000 %	Winter 2001 %
< High school	29	28
High school	55	52
Post-secondary	69	72
University degree	84	82
<b>Total, Canada</b>	<b>65</b>	<b>63</b>

### By age: % responding "yes"

Age	Fall 2000 %	Winter 2001 %
18 to 34	79	76
35 to 54	71	73
55 and over	38	36
<b>Total, Canada</b>	<b>65</b>	<b>63</b>

### By province: % responding "yes"

Province/Region	Fall 2000 %	Winter 2001 %
British Columbia	71	73
Alberta	70	67
Saskatchewan	59	56
Manitoba	58	57
Ontario	70	70
Quebec	55	52
Atlantic	62	54
<b>Total, Canada</b>	<b>65</b>	<b>63</b>



- Despite the exceptional growth in Internet access in the past few years, we see for the first time a levelling off.
- As a result, the gap between older and younger Canadians may remain wide. While 76% of young adults currently have access, only 36% of persons 55 and over do.
- Similarly, the gap between university-educated Canadians and those with less education may remain.
- For this reason, although Government On-Line has great potential in many areas, traditional methods of service delivery and information dissemination will remain important.



## Intentions to Adopt the Internet

*“How likely are you to use the Internet in the next twelve months? Are you very likely, somewhat likely, not very likely or not at all likely?” (Asked only of persons with **no** Internet access.)*

### By province/region

Response	B.C. %	Alta. %	Sask./Man. %	Ont. %	Que. %	Atl. %	Canada %
Very/ Somewhat likely	36	32	25	27	27	34	<b>29</b>
Not very/ Not at all likely	64	66	74	73	71	66	<b>70</b>

### By gender

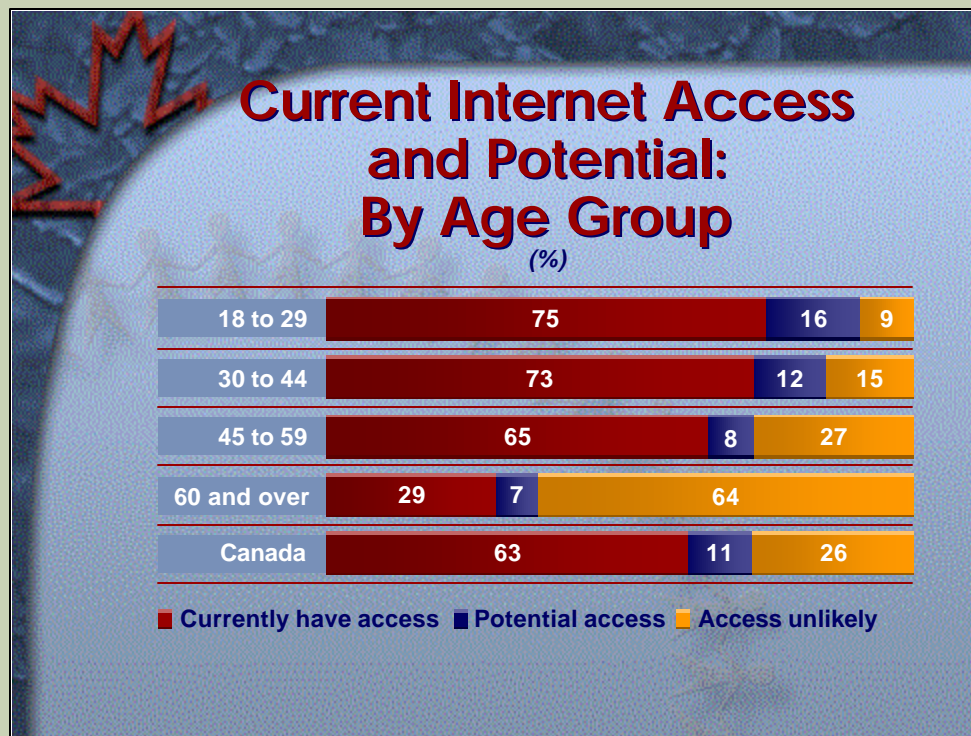
Response	Men %	Women %	Canada %
Very/Somewhat likely	27	31	<b>29</b>
Not very/Not at all likely	72	69	<b>70</b>

### By age group

Response	18 to 29 %	30 to 44 %	45 to 59 %	60 and over %	Canada %
Very/Somewhat likely	62	46	23	10	<b>29</b>
Not very/Not at all likely	38	54	76	89	<b>70</b>

### By education

Response	< High school %	High School %	Post-secondary %	University degree %	Canada %
Very/Somewhat likely	13	27	41	40	<b>29</b>
Not very/Not at all likely	85	73	58	59	<b>70</b>



- The fact that growth in access has levelled off does not necessarily point to zero growth in the future. Canada's Internet population has the potential for further growth: of the 37% of Canadians who do not yet have access, some three in ten indicate that they might use the Internet in the next 12 months.
- Absolute growth would likely be greatest in the 18 to 29 and 30 to 44 age groups. These results suggest that a large number (64%) of Canadians aged 60 and over who do not have access to the Internet apparently have no intention of acquiring it in the near future.
- Growth in Internet access would also be above average in British Columbia, among women and among persons with college or university education (see preceding page). Note that the greatest absolute growth will take place among segments of the population that already have high levels of access.

## Visits to Government of Canada Web Sites

*“Have you visited any Government of Canada Web sites in the past three months?”*

### By province/region

Response	B.C. %	Alta. %	Sask./Man. %	Ont. %	Que. %	Atl. %	Canada %
Yes	42	42	39	46	44	43	<b>44</b>
No	48	52	58	52	54	50	<b>52</b>
Don't know	9	6	3	2	2	6	<b>4</b>

### By age group

Response	18 to 29 %	30 to 44 %	45 to 59 %	60 and over %	Canada %
Yes	48	46	44	27	<b>44</b>
No	50	51	50	66	<b>52</b>
Don't know	3	3	6	7	<b>4</b>

### By education

Response	< High school %	High school %	Post-secondary %	University degree %	Canada %
Yes	27	39	44	49	<b>44</b>
No	57	57	53	47	<b>52</b>
Don't know	16	5	3	4	<b>4</b>

## Visits to Government Web Sites and Government Service

*“Have you visited any Government of Canada Web sites in the past three months?” AND “And how do you rate the overall quality of the service or information you received? Please use a 7-point scale where 1 means very poor, 7 means very good and 4 means neither good nor poor.”*

Response	Yes %	No %
Good service (5,6,7)	62	56
Neutral (4)	17	21
Poor service (1,2,3)	21	23



- A significant number (44%) of Internet users visited a Government of Canada Web site during the three months prior to the survey (see preceding page).
- While visits to government Web sites come fairly evenly from across the regions of the country, use of these Web sites is highest among university- and college-educated people and among Canadians under 45. Internet access in these groups, as we have seen, is well above the national average.
- Those persons who had visited a Government of Canada Web site gave the Government moderately higher ratings for service than those who had not (see last table on preceding page).
- The focus therefore shifts to the role of Government On-Line in improving the Government's service rating and, ultimately, the overall relationship between the Government and Canadians.

## Government On-Line and Innovation: Agreement by Internet Access, Age, Education, and Region

Response to "Putting Government of Canada programs and services and information on-line makes Government more innovative in general."

### By Internet access

Response	Internet access %	No Internet access %	Total %
Agree	84	69	78
Disagree	15	25	19
Don't know	--	6	2
Total	100	100	100

### By age

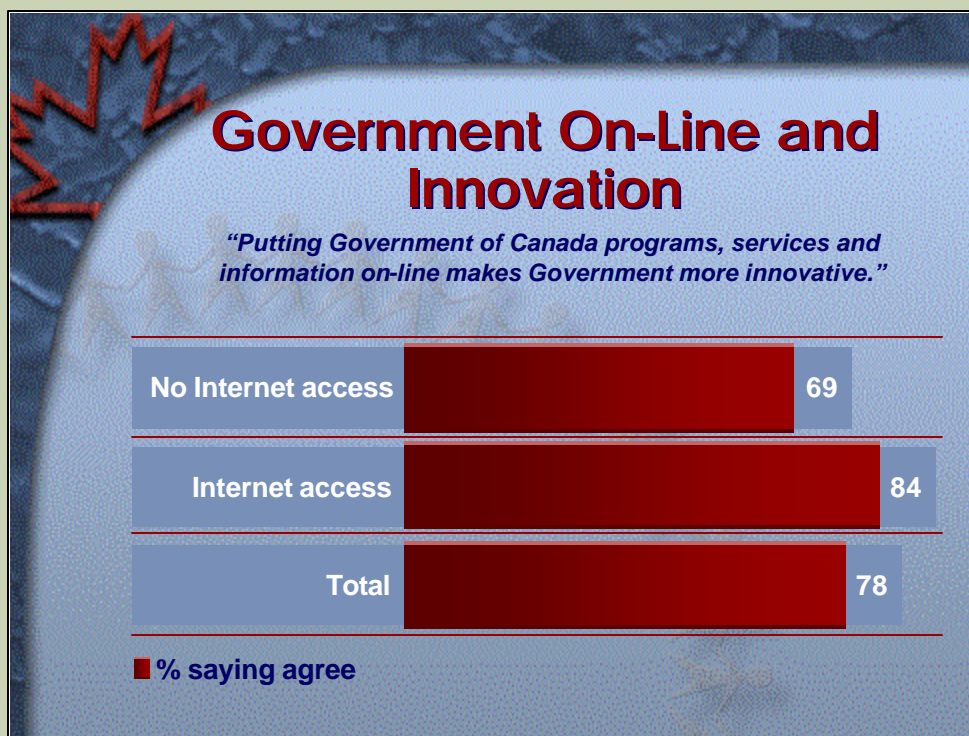
Response	18-29 %	30-44 %	45-59 %	60 + %	Total %
Agree	91	85	75	60	78
Disagree	9	15	23	33	19
Don't know	--	1	2	7	2
Total	100	100	100	100	100

### By education

Response	< High school %	High school %	Post-secondary %	University degree %	Total %
Agree	73	78	81	78	78
Disagree	21	21	16	21	19
Don't know	6	1	3	1	2
Total	100	100	100	100	100

### By region

Response	Atl. %	Que. %	Ont. %	Man./Sask. %	Alta. %	B.C. %	Total %
Agree	81	80	77	77	75	80	78
Disagree	16	17	21	20	22	19	19
Don't know	3	3	2	3	1	1	2
Total	100	100	100	100	100	100	100



- Canadian expectations of Government On-Line are strongly positive. A large majority (78%) of Canadians believe that putting programs, services and information on-line will make the Government more innovative. A majority of both those with Internet access and those without believe this to be the case. Moreover, agreement with this statement is high among Canadians of all age groups, from all educational backgrounds and from all regions.
- This finding is important because, as shown earlier, only 28% of Canadians would describe current government service as innovative, making this the lowest rated of the six aspects of service mentioned.

## Government On-Line and Interacting with Canadians: Agreement by Internet Access, Age, Education, and Region

Response to "Putting Government of Canada programs and services and information on-line improves the way Canadians interact with Government."

### By Internet access

Response	Internet access %	No Internet access %	Total %
Agree	85	65	77
Disagree	14	29	20
Don't know	--	6	2
Total	100	100	100

### By age

Response	18-29 %	30-44 %	45-59 %	60 + %	Total %
Agree	87	84	76	60	77
Disagree	12	15	23	32	20
Don't know	--	1	1	8	2
Total	100	100	100	100	100

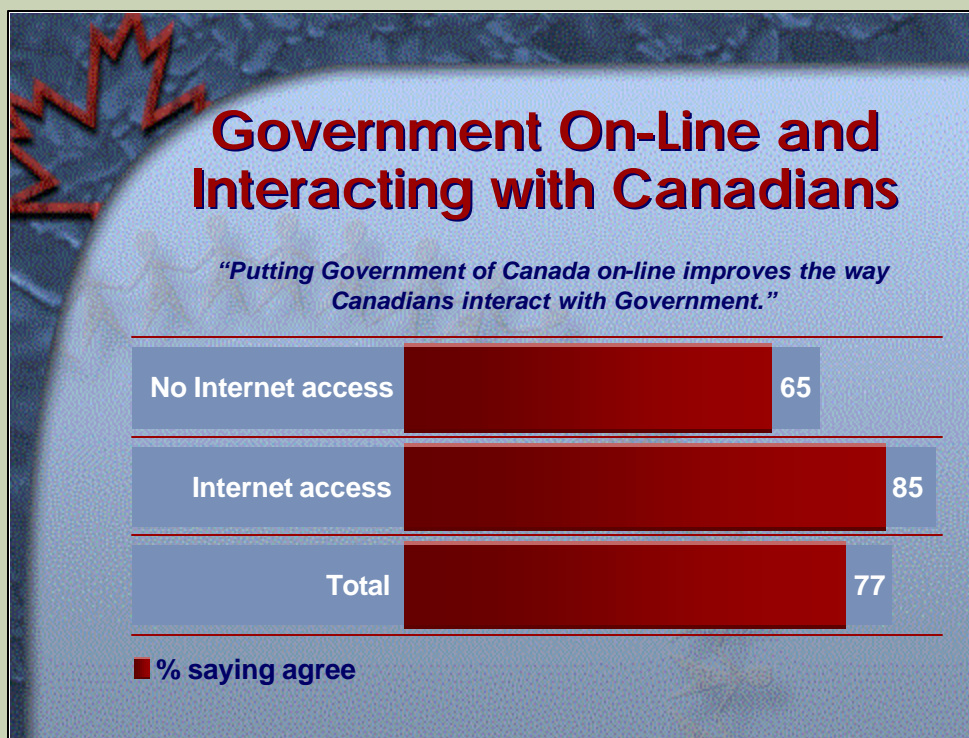
### By education

Response	< High school %	High school %	Post- secondary %	University degree %	Total %
Agree	67	76	79	83	77
Disagree	24	22	20	16	20
Don't know	9	2	1	1	2
Total	100	100	100	100	100

### By region

Response	Atl. %	Que. %	Ont. %	Man./Sask. %	Alta. %	B.C. %	Total %
Agree	77	79	78	75	78	77	77
Disagree	20	18	20	19	18	22	20
Don't know	3	3	2	4	4	1	2
Total	100	100	100	100	100	100	100





- Canadians also believe that Government On-Line will improve the overall relationship between the Government and citizens. As before, an overwhelming majority (77%) are of this opinion.
- Again, this view is widely held by both persons with Internet access and those without, and persons in every age group, from every educational level and in every region.

## Priorities for On-line Services: Demographic Groups and Regions/Provinces with Above Average Demand

*"I am now going to read you a list of two services that might eventually be offered by the Government of Canada over the Internet and I would like you to tell me which one you feel you would be most likely to use."*

### Education: University degree

- Voting in an election (55%)
- Applying for a passport (52%)

### Education: Less than high school

- Applying for Canada Student Loan (33%)
- Applying for Employment Insurance (34%)
- Applying for Old Age Supplement (30%)

### Age: 60 years and over

- Applying for Old Age Supplement (33%)
- Participating in a government survey (65%)
- Registering opinions (65%)

### Age: 18 to 29

- Applying for Canada Student Loan (47%)
- Applying for Employment Insurance (36%)
- Reserving site in national park (47%)
- Applying to the Public Service (45%)

### Income: \$60K and over

- Filing income taxes (66%)
- Applying for passport (55%)

### Income: Less than \$20K

- Applying for Employment Insurance (36%)

### British Columbia

- Reserving site in national park (48%)

### Alberta

- Reserving site in national park (49%)
- Voting in an election (61%)
- Participating in a government survey (65%)
- Registering opinions (65%)

### Saskatchewan and Manitoba

- Registering opinions (62%)

### Ontario

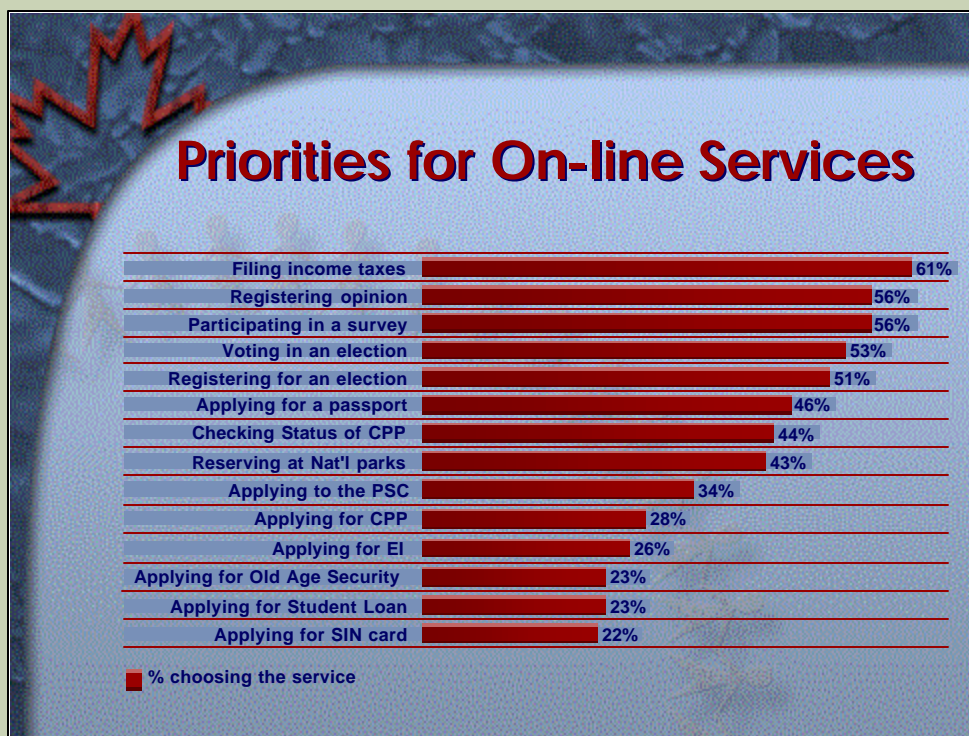
- None

### Quebec

- Applying for Canada Student Loan (31%)
- Applying for Employment Insurance (41%)
- Applying for the Quebec Pension Plan (33%)
- Applying for Old Age Supplement (29%)
- Applying for a Social Insurance Number (32%)

### Atlantic

- Applying to the Public Service (41%)



- We asked respondents with Internet access to rate the priority of services that might eventually be offered on-line. Filing income taxes was chosen as the priority by 61%. Demand for this service is high in all regions.
- Following are opportunities to provide feedback to the Government, for example by responding to surveys and participating in the political process by voting. Only slightly further down the list are program-related activities, such as checking Canada Pension Plan (CPP) status and reserving at national parks.
- The demand for services varies according to different demographic categories and regions or provinces (see preceding page).
- Noteworthy trends are the high demand for program-related transactions among young adults, people with less than high school education, and Quebecers. There is high interest in Alberta in electronic participation in the political process.

## Priorities for On-line Information: Demographic Groups and Regions/Provinces with Above Average Demand

*"I am now going to read you a list of two services that might eventually be offered by the Government of Canada over the Internet and I would like you to tell me which one you feel you would be most likely to use."*

### Education: University degree

- None

### Education: Less than high school

- Job search (61%)

### Age: 60 years and over

- Weather (59%)

### Age: 18 to 29

- Education-related (62%)
- Career-related (65%)
- Job search (69%)

### Income: \$60K and over

- None

### Income: Less than \$20K

- Career-related (62%)
- Job search (69%)

### British Columbia

- None

### Alberta

- None

### Saskatchewan and Manitoba

- Weather (58%)

### Ontario

- None

### Quebec

- E-mail government employee (61%)
- Career-related (62%)

### Atlantic

- Weather (68%)

### Men

- Business-related (55%)
- Weather (55%)

### Women

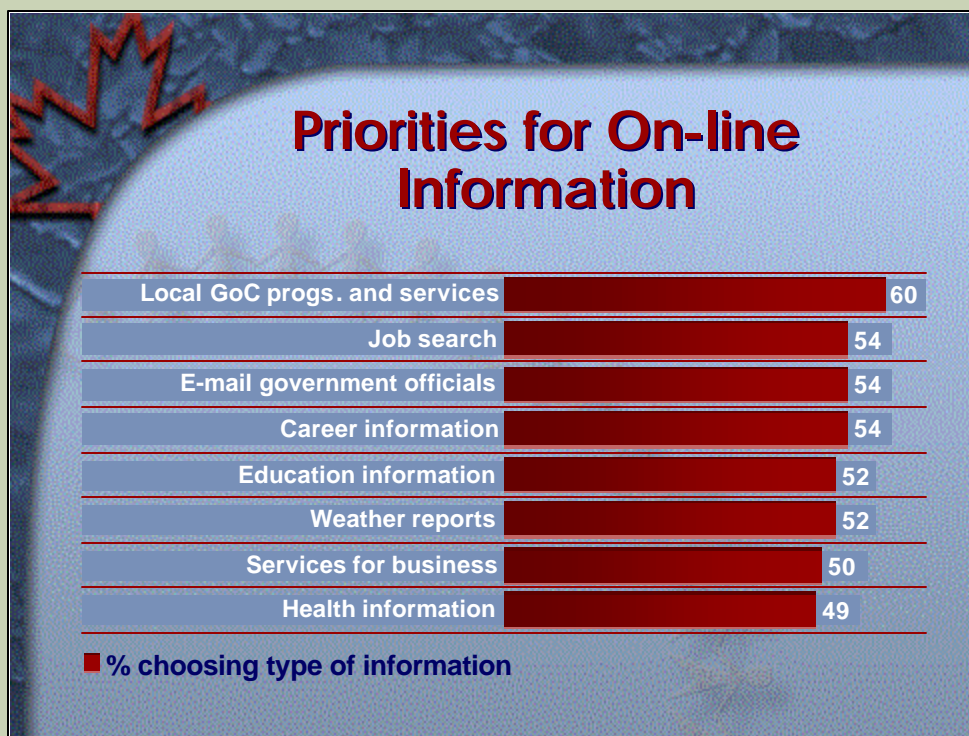
- Lifestyle and health-related (53%)
- Government of Canada services available in the community (65%)

### Urban

- Career-related (57%)

### Rural

- Weather (59%)

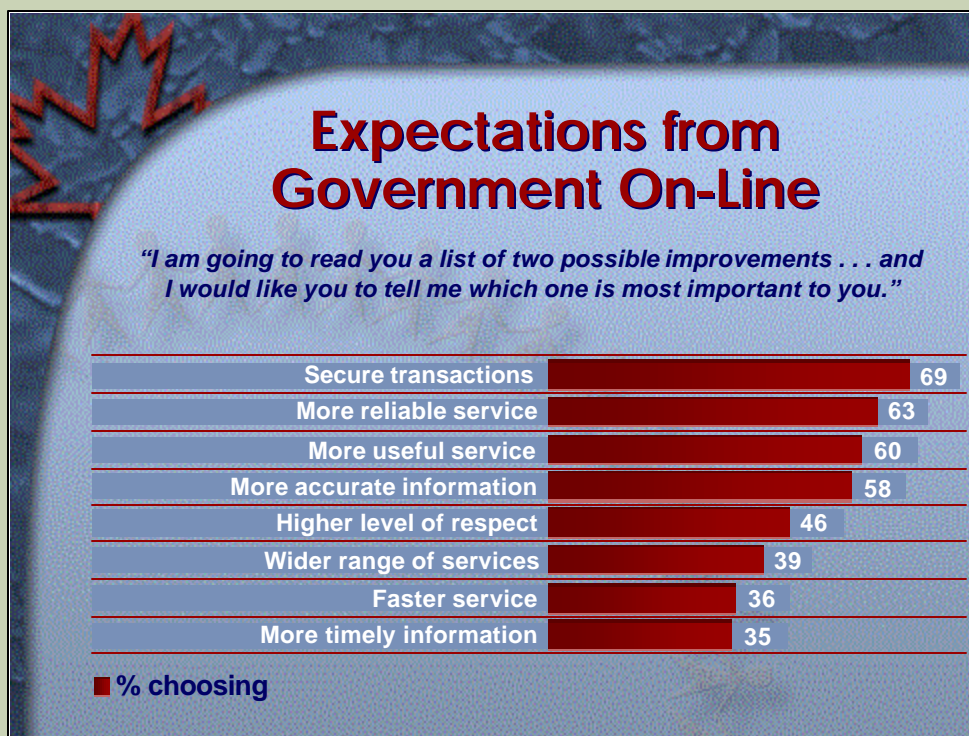


- We then asked respondents with Internet access to rate the priority of certain types of information. We found relatively high demand for on-line information. Canadians are above all interested in Government of Canada programs and services in their community (chosen by 60%).
- There is also high demand for many other types of information, including job searches and information on careers, education, weather and services for business. Many Canadians (54%) want to be able to e-mail government officials directly to make enquiries.
- There is a great deal of interest in community-related information everywhere in the country. The table on the opposite page also shows an above-average demand for information among demographic groups and provinces/regions.
- Noteworthy trends here are the high level of interest in education, job and career information among young adults, and the high level of interest among women in programs and services available in the community.

## Expectations From Government On-Line: By Internet Access

*"I am going to read you a list of two possible improvements . . . and I would like you to tell me which one is most important to you personally."*

Improvement	Internet access %	No Internet access %	Total %
Ensuring transactions where the privacy of people like yourself is secure	71	68	69
Providing more reliable services to Canadians	62	65	63
Providing more useful services to Canadians	60	60	60
Providing more accurate information	60	54	58
Providing a higher level of respect for people like yourself	41	55	46
Providing better access to information	46	39	44
Providing a level of service as good as that of the private sector	42	39	40
Providing a wider range of services to Canadians	40	37	39
Providing faster service to Canadians	37	34	36
Providing more timely information	34	35	35



- When asked to prioritize their expectations of Government On-Line, respondents cited ensuring secure transactions as the most important (69%).
- Quality of service and information represents a second tier of priorities. Canadians rate highly the importance of reliable service (63%), useful services (60%) and accurate information (58%).
- Timely information and speed of service are inherent strengths of the Internet and, consequently, strengths of Government On-Line. Conversely, they are the perceived weaknesses of traditional service delivery. Thus, Government On-Line has the potential to boost service delivery ratings.
- Canadians without Internet access tend to rate a higher level of respect much more highly than do those with access.



## Willingness To Send Personal Information via the Internet To Access Government On-line Services

*"If you wanted to get a service from the Government of Canada over the Internet, which of the following types of information would you be willing to send over the Internet to get this service?"*

### By Internet access

Type of information	Internet access (%)	No Internet access (%)	Total, Canada (%)
Home address	79	51	68
Personal health info.	57	36	49
SIN number	44	23	36
Credit card number	24	4	16
Bank account number	15	5	12

### By gender

Type of information	Men (%)	Women (%)	Total, Canada (%)
Home address	76	61	68
Personal health info.	51	47	49
SIN number	45	28	36
Credit card number	21	12	16
Bank account number	15	8	12

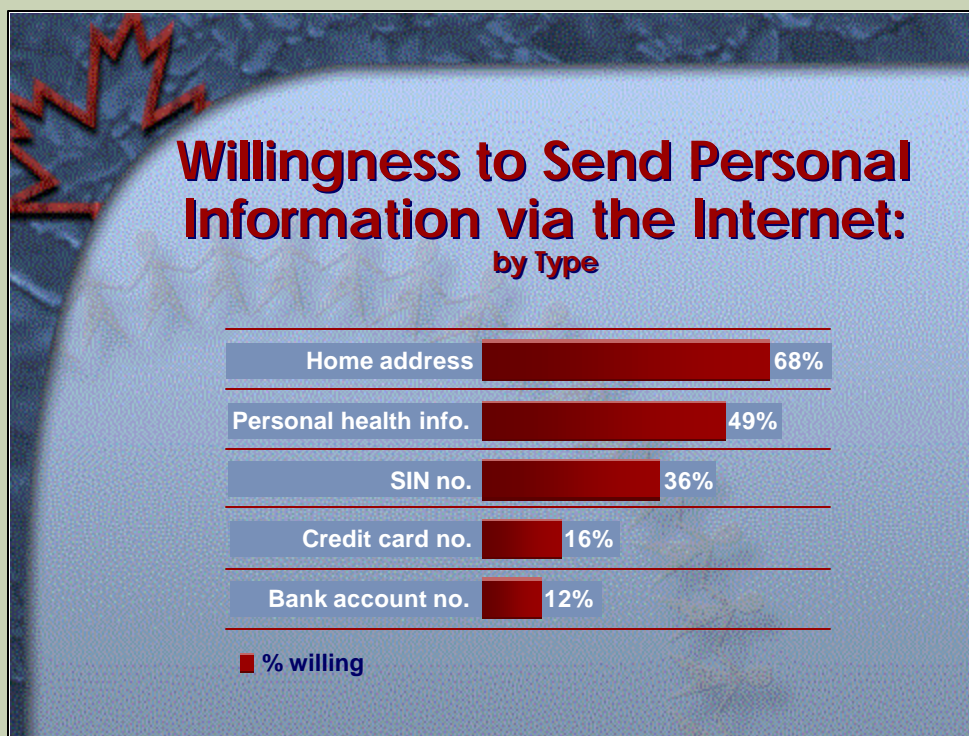
### By age

Type of information	18-29 (%)	30-44 (%)	45-59 (%)	60 + (%)	Total, Canada (%)
Home address	76	73	69	54	68
Personal health info.	67	53	42	54	49
SIN number	41	40	34	29	36
Credit card number	27	19	14	4	16
Bank account number	19	13	9	6	12

### By education

Type of information	< High school %	High school %	Post-secondary %	University degree %	Total, Canada %
Home address	51	62	69	80	68
Personal health info.	43	45	51	53	49
SIN number	26	29	36	48	36
Credit card no.	7	9	16	27	16
Bank account no.	10	7	11	18	12





- Canadians are still very reluctant to send most types of personal information over the Internet in order to engage in personal transactions. A bare majority are willing to divulge their home address and personal health information, and relatively few would divulge financial information such as credit card or bank account numbers.
- Even among persons with Internet access, fewer than half would be willing to give their personal identification numbers. Canadians with no Internet access are even less willing to do so (see preceding page).
- Willingness to disclose personal identifiers is also much lower among women, older Canadians and persons with less than high school education. A majority of persons aged 60 and over (54%) would be willing to give personal health information over the Internet.

## Importance of Traditional Delivery Methods: By Internet Access, Age, Education, and Region

*"If the Government of Canada had a secure Web site to guarantee that your personal information remains confidential, would you use this Web site to obtain government services, or use other methods, such as mail or telephone?"*

### By Internet access

Response	Internet access %	No Internet access %	Total %
Web site	64	24	49
Other methods	34	72	49
Neither/Don't know	2	4	2
Total	100	100	100

### By age

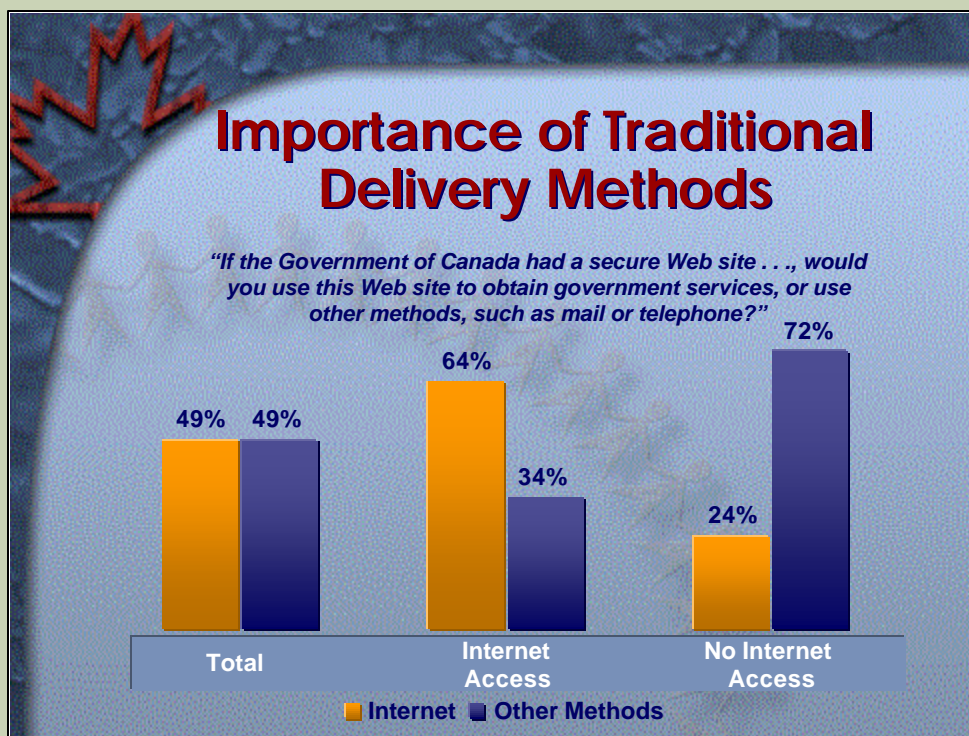
Response	18-29 %	30-44 %	45-59 %	60 + %	Total %
Web site	63	61	46	21	49
Other methods	37	37	52	74	49
Neither/Don't know	--	2	2	5	2
Total	100	100	100	100	100

### By education

Response	< High school %	High school %	Post-secondary %	University degree %	Total %
Web site	26	41	51	65	49
Other methods	71	57	47	33	49
Neither/Don't know	3	2	1	2	2
Total	100	100	100	100	100

### By region

Response	Atl. %	Que. %	Ont. %	Man./Sask. %	Alta. %	B.C. %	Total %
Web site	47	44	51	46	53	52	49
Other method	50	53	47	52	47	44	49
Neither/Don't know	3	3	2	2	--	2	2
Total	100	100	100	100	100	100	100



- Despite the importance of ensuring security, this survey found that, even if concerns about security were met, many Canadians would still prefer traditional methods of obtaining services from the Government. While 64% of those Canadians with Internet access are prepared to use secure Web sites, a strong majority of those without access (72%) would prefer more traditional methods of service delivery.
- Traditional methods of service delivery are also strongly favoured by Canadians 60 and over (74%), persons with less than high school education (71%) and Quebecers (53%) (see preceding page).
- However, a majority of Canadians under 45 and those with post-secondary or university education would use a secure Web site for on-line transactions.

## Conclusion

- **Current priorities: social issues, especially health care**
- **“Service” focus of corporate communications**
- **Government On-Line has potential to improve satisfaction with service**
- **Traditional service methods remain important**

- Canadians want the Government to focus on social issues, particularly health care, children and education.
- Although they are concerned with social issues, they believe the Government in its new mandate will focus primarily on economic issues.
- In the event of an economic slowdown, Canadians will become more concerned with economic issues, particularly jobs, unemployment and economic management.
- Increased contact with the public and high quality service are important factors that can contribute to a better long-term relationship between the Government and citizens. Given that the Internet has so far made a positive impact on the delivery of service to the public, Government On-Line has the potential to improve the quantity and quality of contacts between the Government and the public.
- Canadians have positive expectations of Government On-Line. They place a high priority on reliable service and accurate information through the Internet, but most of all, they expect the Government to provide a high level of security and privacy. Consequently, most Canadians are still reluctant to divulge confidential personal data in electronic transactions with the Government.
- Finally, while many Canadians are ready to embrace Government On-Line, many are not ready to start using the Internet, let alone conduct transactions electronically. Traditional methods of contact – telephone, mail and in-person visits – will be important vehicles of communication and service delivery in parallel with the increasing role of the Internet for some time to come, especially for those segments of the Canadian public that are not yet on-line.

## The Survey (Wave VIII)

- Total sample – 4, 950 adults aged 18 and over
- Maximum margin of error for the total sample for Canada at a 95% confidence interval: 1.4%
- Over-sampling done in Saskatchewan, Manitoba, Newfoundland, and Prince Edward Island
- Interviewing conducted by telephone by the firms Ipsos-Reid and GPC Communications between January 15 and January 31, 2001

### Total Interviews by Ipsos-Reid and GPC Communications

	Actual percentage of Canada's population	Proportion of sample in relation to proportion of Canada's population	Number of interviews conducted	Maximum margin of error	Over-sampling (number of persons)
B.C.	12.1	649	450	+/-4.7%	
Alta.	9.3	458	400	+/-5%	
Sask.	3.6	177	322	+/-5.6%	145
Man.	4.1	196	325	+/-5.5%	129
Ont.	37.8	1856	1301	+/-2.8%	
Que.	25.3	1222	1100	+/-3.0%	
N.B.	2.6	125	125	+/-8.9%	
N.S.	3.0	151	125	+/-8.9%	
P.E.I.	.4	26	402	+/-5.0%	376
Nfld.	1.8	94	400	+/-5.0%	306
(Atl.)	(7.8)	(396)	(1102)	+/- (3.0%)	(682)
TOTAL	100	4954	4950	+/-1.4%	

### Interviews by GPC Communications

	Actual percentage of Canada's population	Proportion of sample in relation to proportion of Canada's population	Number of interviews conducted	Maximum margin of error	Over-sampling (number of persons)
B.C.	12.1	340	200	+/-7.1%	
Alta.	9.3	245	200	+/-7.1%	
Sask.	3.6	92	222	+/-6.7%	130
Man.	4.1	100	225	+/-6.7%	125
Ont.	37.8	978	501	+/-4.5%	
Que.	25.3	630	500	+/-4.5%	
N.B.	2.6	64	75	+/-11.5%	
N.S.	3.0	80	75	+/-11.5%	
P.E.I.	.4	17	302	+/-5.8%	285
Nfld.	1.8	52	300	+/-5.8%	248
(Atl.)	(7.8)	(213)	(752)	+/- (3.6%)	
TOTAL	100	2598	2600	+/-2.0%	+/-

### Interviews by Ipsos-Reid

	Actual percentage of Canada's population	Proportion of sample in relation to proportion of Canada's population	Number of interviews conducted	Maximum margin of error	Over-sampling (number of persons)
B.C.	12.1	309	250	+/-6.3%	
Alta.	9.3	231	250	+/-7.1%	
Sask.	3.6	85	100	+/-10.0%	15
Man.	4.1	96	100	+/-10.0%	4
Ont.	37.8	878	800	+/-3.5%	
Que.	25.3	592	600	+/-4.1%	
N.B.	2.6	61	50	+/-14.1%	
N.S.	3.0	71	50	+/-14.1%	
P.E.I.	.4	9	100	+/-10.0%	91
Nfld.	1.8	42	100	+/-10.0%	58
(Atl.)	(7.8)	(183)	(300)	+/- (5.8%)	(108)
TOTAL	100	2356	2350	+/-2.1%	