Advancing online government service: Canadians open to more & better access; concerned about cybersecurity

Just one-in-ten see Canada as a current leader in offering its citizens digital services

March 4, 2021 – If ever there has existed an era of life online being accelerated and catalysed by unforeseen events it has been the last twelve months.

COVID-19 has engendered so many changes to our daily lives in Canada. From new ways of working and socializing, to a new lexicon, and most especially, the extent to which we are now living our lives online to shop, to be entertained, to connect with family, and to access assistance and services from our governments, such as the federal government's Coronavirus Emergency Response Benefit, accessed digitally by millions of Canadians.

But just because services exist doesn't necessarily mean they function as well as they might or that more shouldn't be offered.
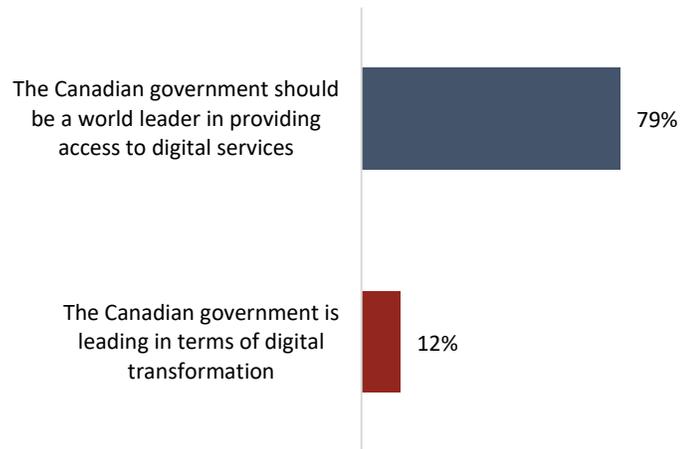
A new study from the non-profit Angus Reid Institute, in partnership with the Internet Society Canada Chapter and Amazon Web Services (AWS), finds Canadians open to and enthusiastic about government overhauling and improving its online services, but notably wary of offering more of their personal information in the digital space.

The Canadian government and digital transformation
(Percentage that agree with each statement)

The Canadian government should be a world leader in providing access to digital services — 79%

The Canadian government is leading in terms of digital transformation — 12%

METHODOLOGY:

The Angus Reid Institute conducted an online survey from Feb 5 – 11, 2021 among a representative randomized sample of 2,010 Canadian adults who are members of Angus Reid Forum. For comparison purposes only, a probability sample of this size would carry a margin of error of +/- 2.2 percentage points, 19 times out of 20. Discrepancies in or between totals are due to rounding. The survey was conducted in partnership with Amazon Web Services (AWS) and the Internet Society Canada Chapter (ISCC) and paid for jointly by ARI, AWS and ISCC. Detailed tables are found at the end of this release.

Six-in-ten (63%) say a focus on government digital transformation will make it easier to access services, while close to the same number (59%) say it would improve their experiences with the services that exist. An overwhelming majority (92%), however, also say that Canadian government needs to prioritize investing in cybersecurity to ensure the personal information they'd input online while accessing expanded services is well protected.

More Key Findings:

- Ensuring access for people with disabilities is high on Canadians' digital transformation priority list. More than four-in-five (86%) say government needs to focus on enhancing digital accessibility for this population.

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- Canadians trust the private sector (37%) slightly more than government (25%) to protect against cybersecurity threats, while 23 per cent say both are equally capable. Four-in-five (78%) say government should engage the private sector to help with digitization efforts.

- 67 per cent of Canadians say it is important to them to have access to government services digitally, even if more traditional options are available.

About ARI

*The **Angus Reid Institute (ARI)** was founded in October 2014 by pollster and sociologist, Dr. Angus Reid. ARI is a national, not-for-profit, non-partisan public opinion research foundation established to advance education by commissioning, conducting and disseminating to the public accessible and impartial statistical data, research and policy analysis on economics, political science, philanthropy, public administration, domestic and international affairs and other socio-economic issues of importance to Canada and its world.*

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Part One: Canadians and their life online

**<u>Doing more online, more often</u>**

More and more aspects of life have been moving online in recent decades, but as with so many other changes, COVID-19 has been an accelerant. With many in-person activities less convenient and less safe due to the pandemic (or curtailed entirely by lockdowns), two-thirds (67%) of Canadians say they have been spending more time online than they did before coronavirus hit.

**Would you say you are now spending more time online than you
did pre-COVID-19, less time now, or about the same overall?
(All Respondents, n=2,010)**

A lot more time online now	27%
More time now	41%
About the same	30%
Less time now	2%
A lot less time online now	1%
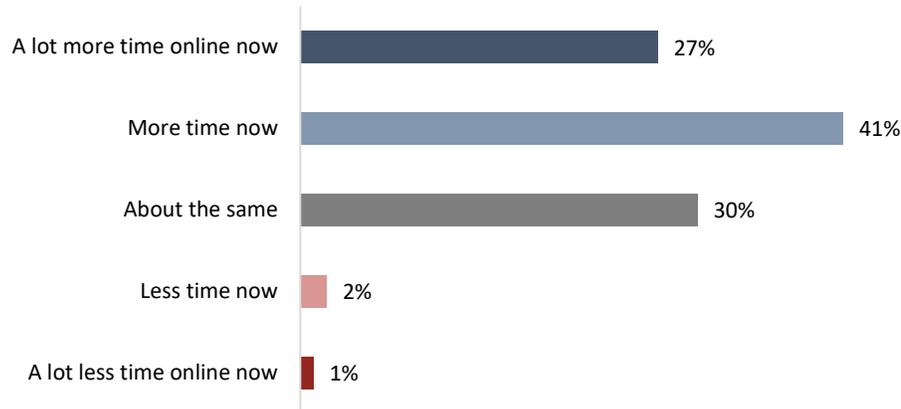
Even when asked to *exclude* the well-chronicled time sink of streaming TV shows and movies online, 86 per cent report that they spend at least two or more hours per day online.

**Roughly how much time in total would you say you spend online in
a typical day, excluding streaming TV shows and movies?
(All respondents, n=2,010)**

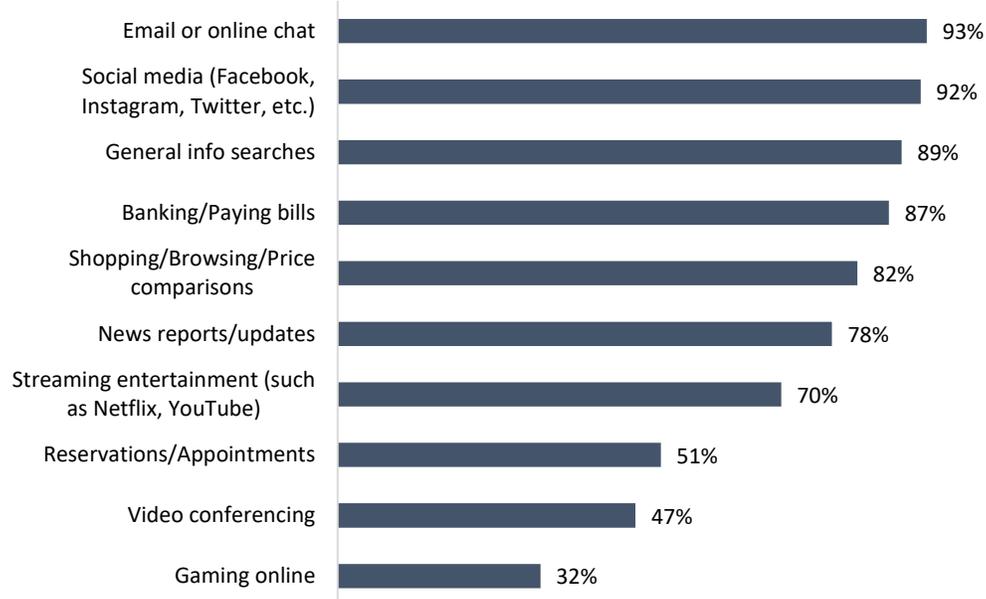|	
Less than an hour	2%
About an hour	11%
2 or 3 hours	42%
4 or 5 hours	23%
6 or more hours	21%
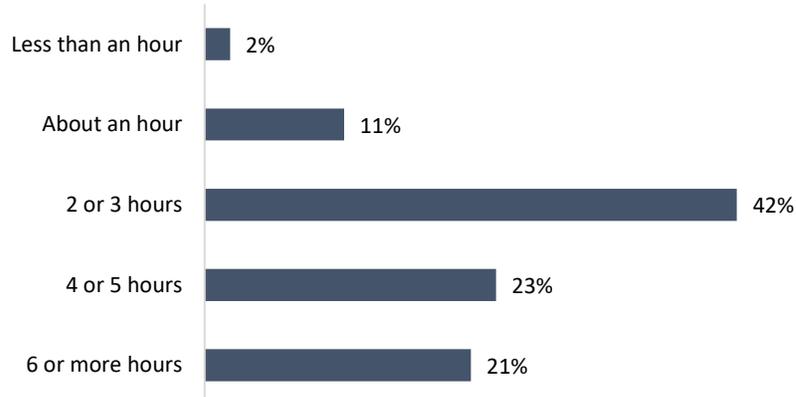
Of course, this is in part because a wide array of activities and services are available on the internet. Email, social media, information searches, digital banking, and online shopping are all done by the vast majority (80% or more) with at least some regularity.

What kinds of things do you do online at least once a week?
(All respondents, n=2,010)

Activity	Percentage
Email or online chat	93%
Social media (Facebook, Instagram, Twitter, etc.)	92%
General info searches	89%
Banking/Paying bills	87%
Shopping/Browsing/Price comparisons	82%
News reports/updates	78%
Streaming entertainment (such as Netflix, YouTube)	70%
Reservations/Appointments	51%
Video conferencing	47%
Gaming online	32%

Canadians comfortable navigating the online world

With time spent online increasing, most Canadians express confidence navigating the digital world, with nearly half (46%) saying they are very comfortable doing a variety of activities online. One caveat: this survey was conducted online, meaning that all respondents are people who are at least digitally comfortable enough to complete a survey via the internet.

Some people are more comfortable navigating the digital world than others. Would you describe your own level of comfort as:
(All Respondents, n=2,010)
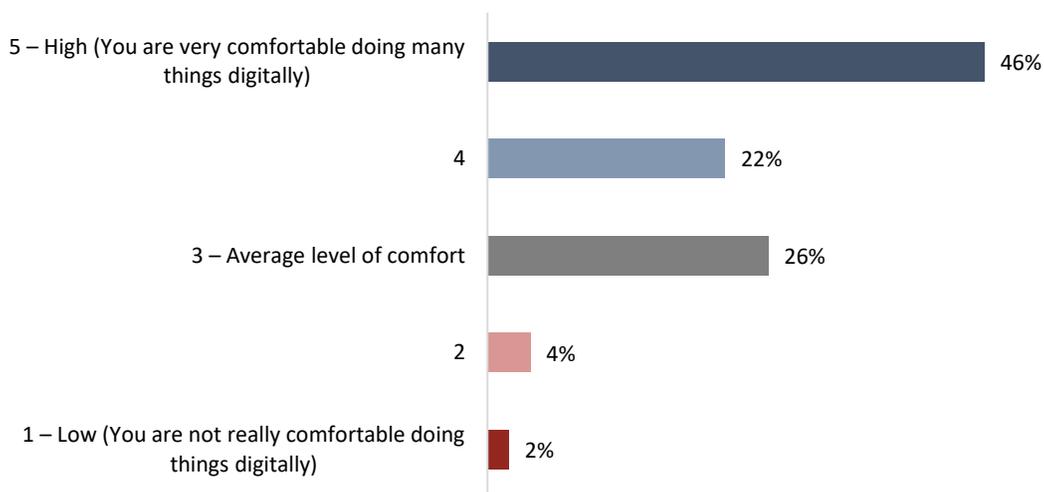
| Level	Percentage
5 – High (You are very comfortable doing many things digitally)	46%
4	22%
3 – Average level of comfort	26%
2	4%
1 – Low (You are not really comfortable doing things digitally)	2%

Looking at this by age group, those who are young enough to have grown up with the internet are the most likely to say they are most able to navigate the digital world. However, it is worth noting that even amongst those 65 years of age and older, only 13 per cent report having a lower level of comfort.

Some people are more comfortable navigating the digital world than others. Would you describe your own level of comfort as:							
	Total (n=2,010)	**Age**					
		18-24 (n=160)	**25-34 (n=408)**	**35-44 (n=334)**	**45-54 (n=361)**	**55-64 (n=314)**	**65+ (n=433)**
High (4-5) level of comfort	68%	88%	84%	77%	69%	57%	46%
Average (3) level of comfort	26%	10%	13%	20%	27%	33%	41%
Low (1-2) level of comfort	6%	2%	3%	2%	4%	10%	13%

Significant use of government services online

Widespread use of the internet also extends to adoption of digital government services. For example, two-thirds (65%) of Canadians participating in this national survey say they have filed their taxes online at least once, and among those who have applied for employment insurance recently, more than nine-in-ten (93%) say they did so over the internet (see detailed tables). Further, most Canadians have at least one kind of online account (e.g. a "My CRA" account for tax purposes) with the Government of Canada.

**Do you currently have any kind of online account with the
Government of Canada?
(All Respondents, n=2,010)**
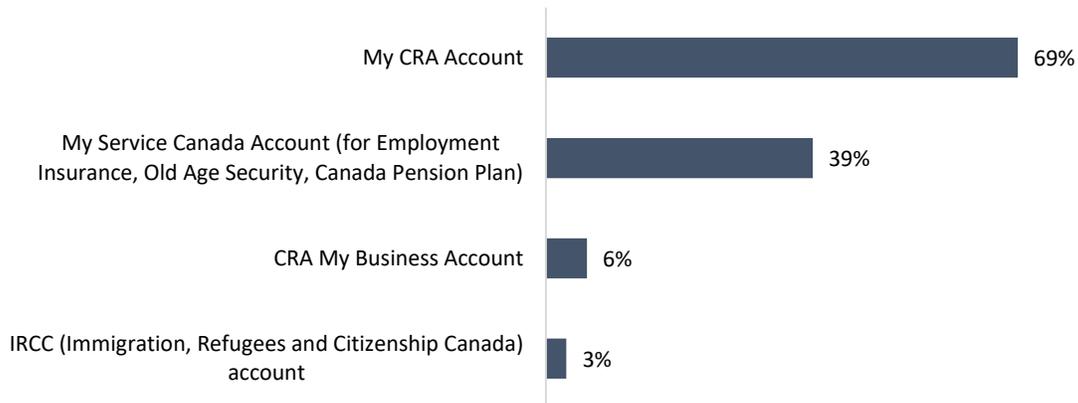

■ Yes ■ No ■ Don't know/Not sure
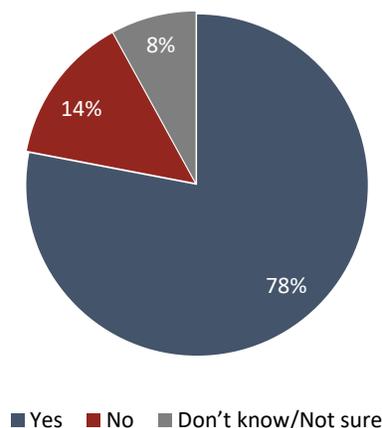
The most widely accessed Canadian government account is the My CRA account, used by seven-in-ten (69%), followed by accounts with My Service Canada (for EI and pensions):
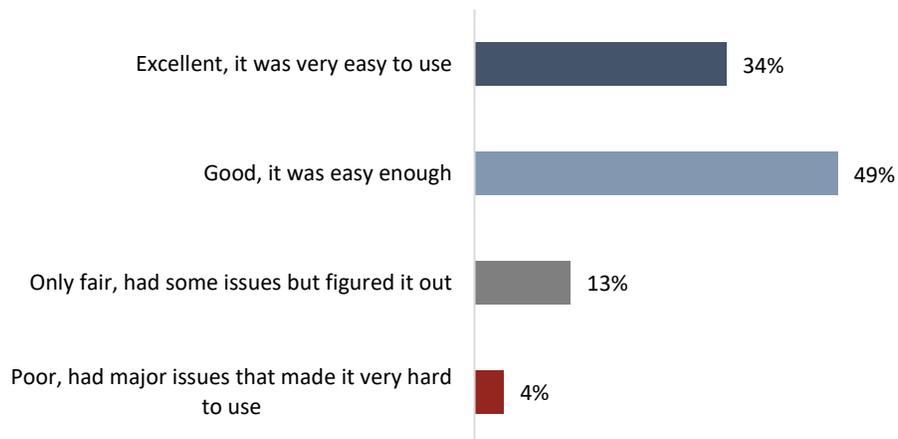
Percentage who have each of the following Canadian government accounts (All respondents, n=2,010)

My CRA Account	69%
My Service Canada Account (for Employment Insurance, Old Age Security, Canada Pension Plan)	39%
CRA My Business Account	6%
IRCC (Immigration, Refugees and Citizenship Canada) account	3%

Digital government services receive generally high marks from users. Among those who have renewed their provincial health card online, 87 per cent rate the ease of use as good or excellent (see detailed tables). Another example is the submission of taxes on the Canada Revenue Agency site. More than four-in-five users say their experience with the website was good or better, though this does leave a significant segment of nearly one-in-five who found the experience clunky:

How would you rate your experience accessing or using the website for E-filing with the CRA? (Filed taxes online in the past few years, n=1,161)

Excellent, it was very easy to use	34%
Good, it was easy enough	49%
Only fair, had some issues but figured it out	13%
Poor, had major issues that made it very hard to use	4%

A broad cross section of online government services, from both the federal and provincial governments, score well for ease of access and use. While the ratings vary, in each case a majority of users were pleased with the experience they had. For those giving low marks, the top reasons were that the process was confusing or that the site was difficult to navigate (see detailed tables).
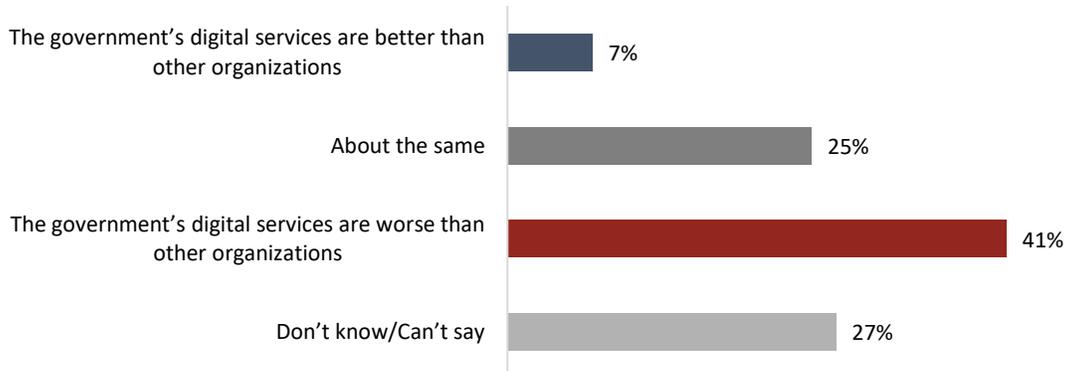
Ratings of experience accessing each of the following digital government services (Among those who used each service online)								
	Federal government services				Provincial government services			
	E-filing taxes (n=1,161)	Applying for EI (n=433)	Applying for OAS/CPP (n=133)	Applying for CERB (n=459)	Renew driver's license (n=708)	Renew health card (n=621)	Checking province COVID info site (n=1,262)	Finding govt service info (n=1,565)	Finding govt service info for business (n=110)
Excellent	34%	26%	21%	45%	32%	29%	20%	11%	8%
Good	49%	48%	61%	37%	55%	59%	60%	59%	58%
Only fair	13%	23%	17%	15%	11%	10%	16%	24%	24%
Poor	4%	3%	1%	3%	2%	3%	4%	5%	11%

That said, a plurality of Canadians still find other private sector organizations do a better job with their online offerings:

Regarding the federal government of Canada, how do you think its digital services compare to those offered by other large organizations operating in this country? (All Respondents, n=2,010)

The government's digital services are better than other organizations	7%
About the same	25%
The government's digital services are worse than other organizations	41%
Don't know/Can't say	27%

Part Two: Attitudes Towards Digitizing Government

The impacts of improving government digitization

For its part, the Government of Canada has undertaken a Digital Operations Strategic Plan. The intention, according to the plan, it is to provide services in "ways that are optimized for digital and available anytime, anywhere and from any device."

Given the myriad other priorities facing Canadians these days, it may not come as a surprise that awareness of the government's digital transformation plan is quite low. Three-quarters of Canadians (73%) say they have either never heard of it or are familiar with the term but know nothing about what it means.

Before today, have you read, heard, or seen anything about government digital transformation?
(All Respondents, n=2,010)

Response	Percentage
No, nothing before today	46%
Just the term, don't really know anything about it	27%
Yes, heard/know something about it	24%
Yes, heard a lot/quite familiar	3%
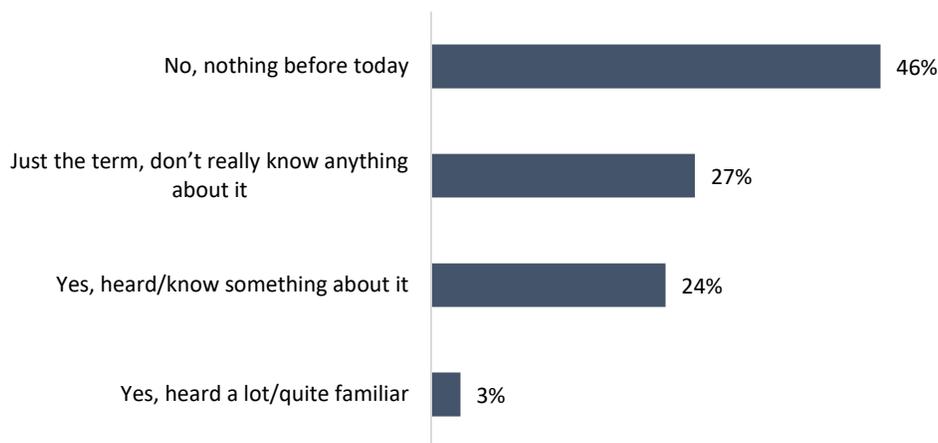
Once informed of the concept (see questionnaire here), Canadians see benefits that a push for digitization could have on public services. In terms of the cost to taxpayers, user experience, and accessibility, a clear majority think this transformation would be either an improvement or at least no worse than the status quo.

The one exception is security of personal information, which half (48%) say would likely be worse due to a digital overhaul. This is a consistent hesitation on the part of the public, and will be discussed later in the report:

Impacts of a push to digitize government services in Canada on each of the following:
(All Respondents, n=2,010)

	Cost	Ease of access to services	User experience with services	Security of personal info	Public accessibility of services
Positive impact	50%	63%	59%	27%	51%
Mixed impact	23%	24%	23%	20%	38%
Negative impact	16%	10%	14%	48%	8%
No idea	12%		5%		

■ No idea ■ Negative impact ■ Mixed impact ■ Positive impact
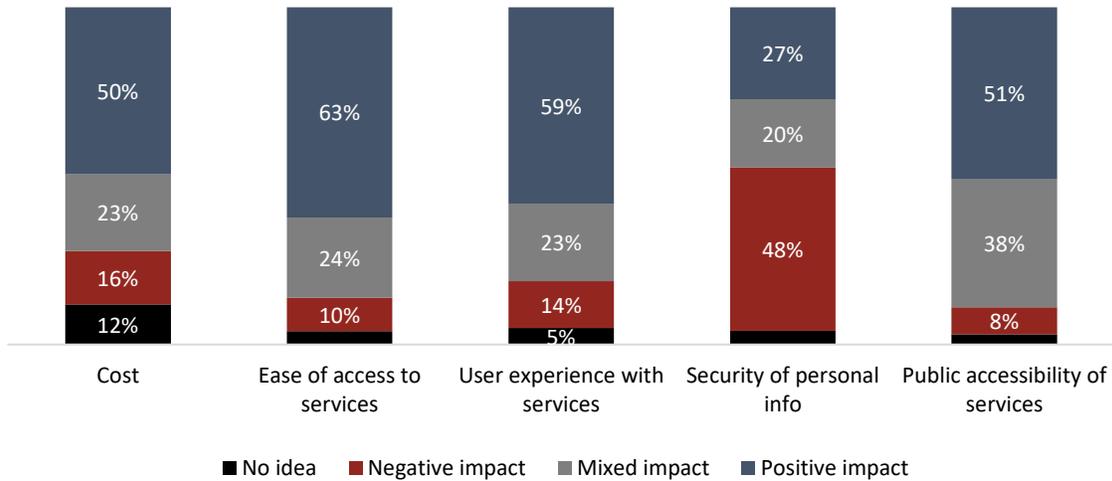
As noted earlier, young Canadians are the most likely to feel a high level of comfort online, so it is worth considering how different age groups view the potential outcomes of a digital transformation for government services. Optimism about ease of access for services declines with age, though this is driven by older Canadians being more likely to say the change will have a neutral impact, not a bad one.

Impacts of a push to digitize government services in Canada - People will find accessing more government services online:		Age					
	Total (n=2,010)	18-24 (n=160)	25-34 (n=408)	35-44 (n=334)	45-54 (n=361)	55-64 (n=314)	65+ (n=433)
Easier	63%	78%	72%	66%	58%	57%	54%
About the same	24%	14%	16%	22%	27%	28%	30%
More difficult	10%	7%	9%	9%	10%	10%	11%

The story is the same with the issue of increasing public access to services: while not all age groups are as equally upbeat about broadening digital access, those who think it will actually do more harm than good represent a small minority.

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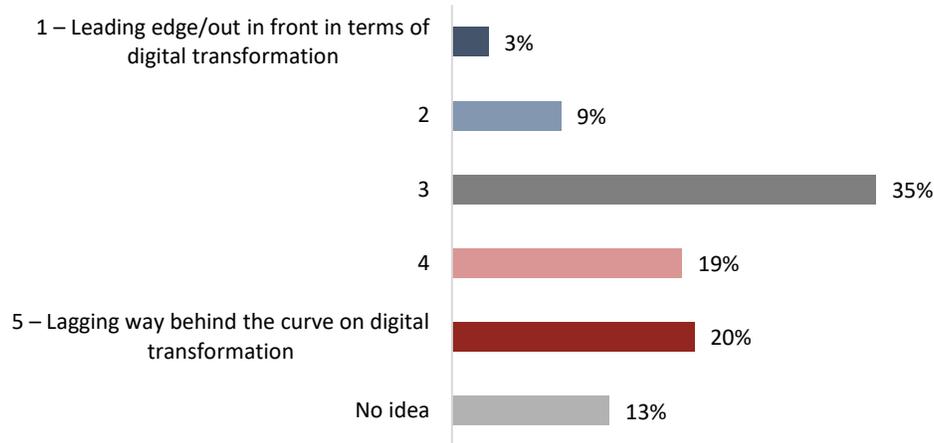| Impacts of a push to digitize government services in Canada - Overall, does expanding digital services benefit or hurt public access to government services?							
	Total (n=2,010)	**Age**					
		18-24 (n=160)	**25-34 (n=408)**	**35-44 (n=334)**	**45-54 (n=361)**	**55-64 (n=314)**	**65+ (n=433)**
Benefits more	51%	61%	60%	54%	45%	50%	41%
Mixed impact	38%	32%	31%	37%	43%	38%	45%
Hurts more	8%	4%	7%	5%	8%	9%	11%

Canadians want their governments to get to work

Many Canadians indicate access to digital services is now their preferred choice. Just three-in-ten agreed with the idea that more traditional methods would be preferable. Conversely, more than twice as many *disagreed*:

Agreement: I don't really care about having access to digital services, if I can do things another way
(All Respondents, n=2,010)

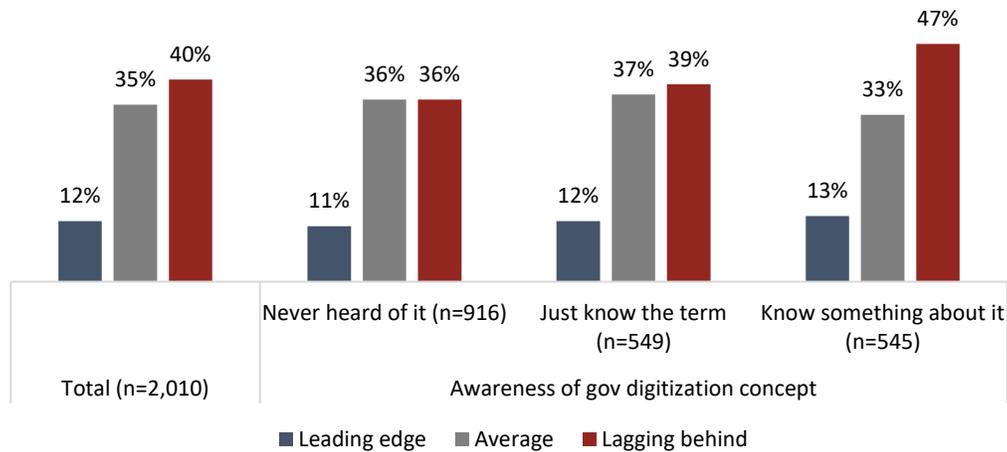|	
Strongly Agree	8%
Agree	22%
Disagree	34%
Strongly Disagree	33%
Don't know/Can't Say	4%
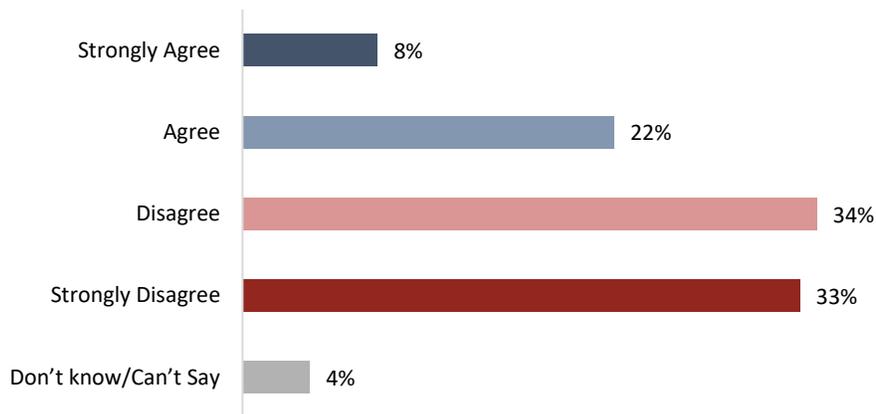
As with many aspects of Canada's place on the world stage, four-in-five (79%) think the government should be a global leader when it comes to providing digital services. Few, however, feel the country is anywhere close to this distinction. When it comes to digital transformation, three times as many say the country is lagging the world (39%) as say it is leading (12%).

Thinking of digital transformation, the federal government of Canada today is:
(All Respondents, n=2,010)

1 – Leading edge/out in front in terms of digital transformation	3%
2	9%
3	35%
4	19%
5 – Lagging way behind the curve on digital transformation	20%
No idea	13%

Notably, those who profess having the most knowledge of this area of government are most negative about progress thus far:

Thinking of digital transformation, the federal government of Canada today is:

	Leading edge	Average	Lagging behind
Total (n=2,010)	12%	35%	40%
Never heard of it (n=916)	11%	36%	36%
Just know the term (n=549)	12%	37%	39%
Know something about it (n=545)	13%	33%	47%

Awareness of gov digitization concept

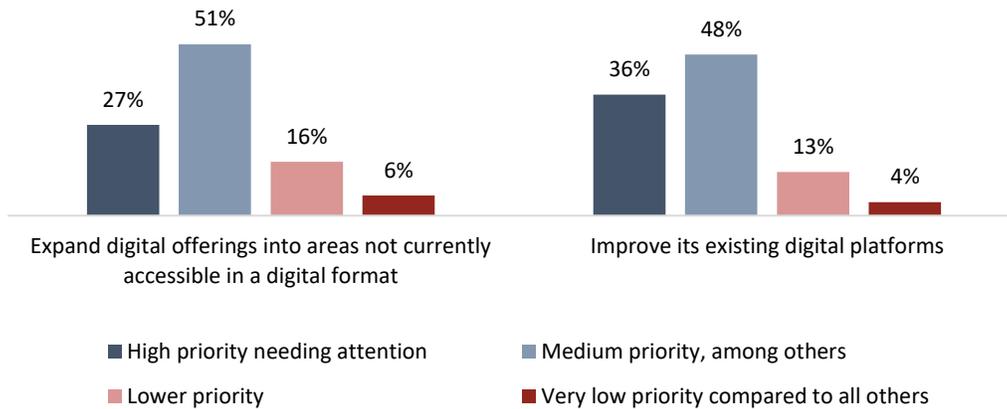■ Leading edge ■ Average ■ Lagging behind

Cybersecurity is a top priority

When asked how important it is to expand government digital services into new areas, given the many priorities facing all levels of government in Canada, the majority say it is either a medium (51%) or high (27%) priority. The same is true for improving existing digital platforms, and it rates similarly in importance to adding new offerings. In both cases, fewer than a quarter consider it to be a lower priority issue.

Keeping in mind the range of economic and social priorities facing our governments, how much of a priority should it be for the federal and provincial governments of Canada to:
(All respondents, n=2,010)

Expand digital offerings into areas not currently accessible in a digital format
- 27% High priority needing attention
- 51% Medium priority, among others
- 16% Lower priority
- 6% Very low priority compared to all others

Improve its existing digital platforms
- 36% High priority needing attention
- 48% Medium priority, among others
- 13% Lower priority
- 4% Very low priority compared to all others

- ■ High priority needing attention
- ■ Medium priority, among others
- ■ Lower priority
- ■ Very low priority compared to all others

But where to focus? Canadians say investing in cybersecurity is at the top of their list, followed by ensuring access for people with disabilities:

Percentage saying each of the following should be given "high" or "very high" priority
(All Respondents, n=2,010)

Investing more into cybersecurity	92%
Ensuring digital platforms are as accessible as possible for persons with disabilities	86%
Making more licensing/ renewals available online	81%
Ensuring websites are as mobile-friendly as possible	75%
Enhancing user experience (e.g. site navigation)	72%
Building apps for mobile devices	59%
Offering digital services in languages other than English and French	40%

The focus – and concern – over cybersecurity comes at a time when cybersecurity risks are in the spotlight around the world, and especially south of the border. The SolarWinds hack – a massive cybersecurity breach – affected roughly 100 companies and nine federal agencies in the US. In October, more than a quarter of Canadian IT professionals surveyed by the Canadian Internet Registration Authority said their organization had dealt with some kind of COVID-19-themed cyber attack.
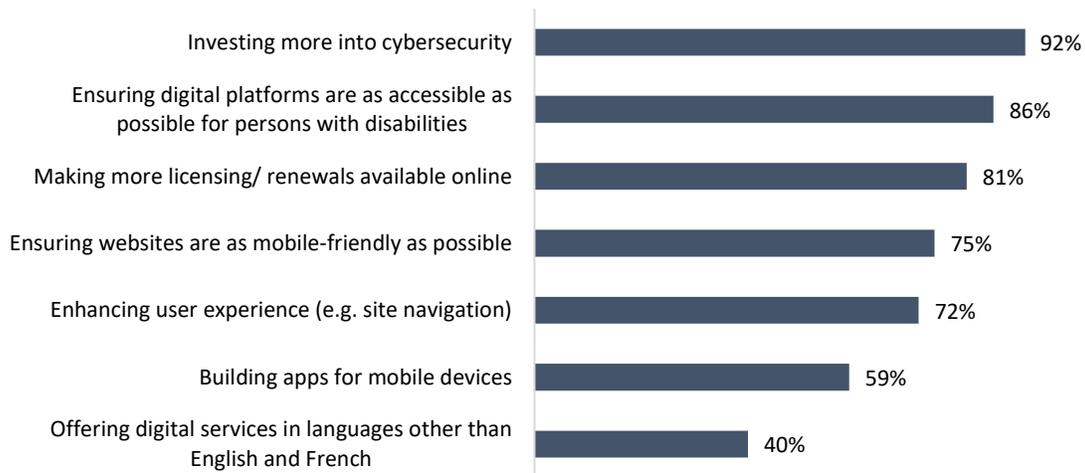
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Little wonder, then, that the 92 per cent of Canadians who want the government to prioritize security parallels with the number who say that cybersecurity poses a huge risk to Canada:

Agreement: Cybersecurity (e.g. hacking, theft of sensitive data) poses a huge risk to countries like Canada (All Respondents, n=2,010)

Strongly Agree	59%
Agree	33%
Disagree	4%
Strongly Disagree	1%
Don't know/Can't Say	3%
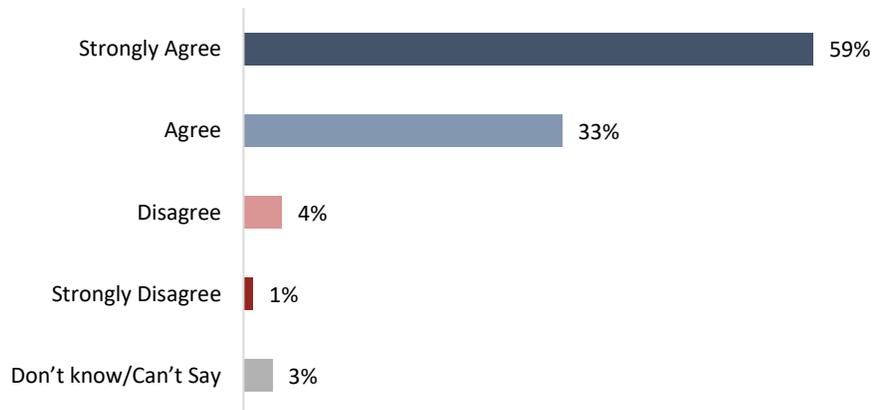
Should government work with private sector to speed progress?

As with so much else in the digital realm, watching for, preventing and recovering from cyber attacks is a complex and demanding task. The pandemic seems to have exacerbated the situation.

There is a silver lining: the problem is so widespread that expertise in combating it has been developed in a wide array of organizations, particularly in large companies and government agencies. When it comes to the security side, more Canadians see the private sector as better able to protect against threats of this type, by a moderate margin of 12 percentage points.

Who would better protect against cybersecurity threats, for example hacking and theft of personal data? (All Respondents, n=2,010)

Government better	25%
Equal/Neither better	23%
Private sector better	37%
No idea/Can't say	15%
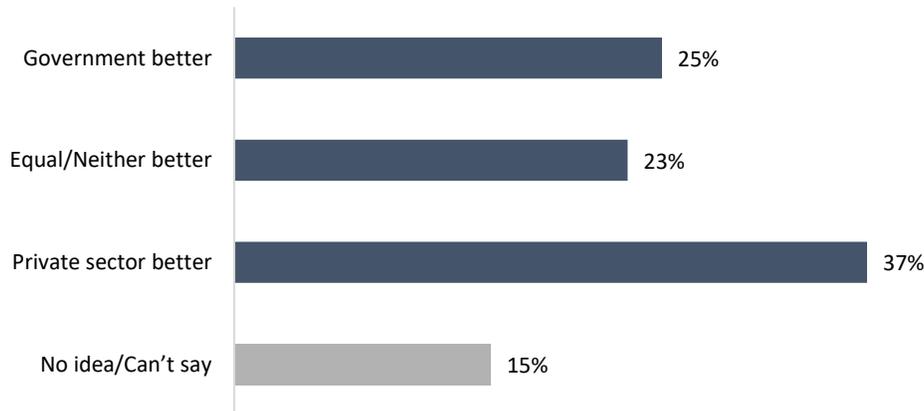
Further, they express support for the federal government to work alongside the private sector as part of a push for digitization.

Agreement: The Canadian government should work with private sector technology companies and experts on digitization efforts (All respondents, n=2,010)

Strongly Agree	35%
Agree	43%
Disagree	7%
Strongly Disagree	4%
Don't know/Can't Say	12%
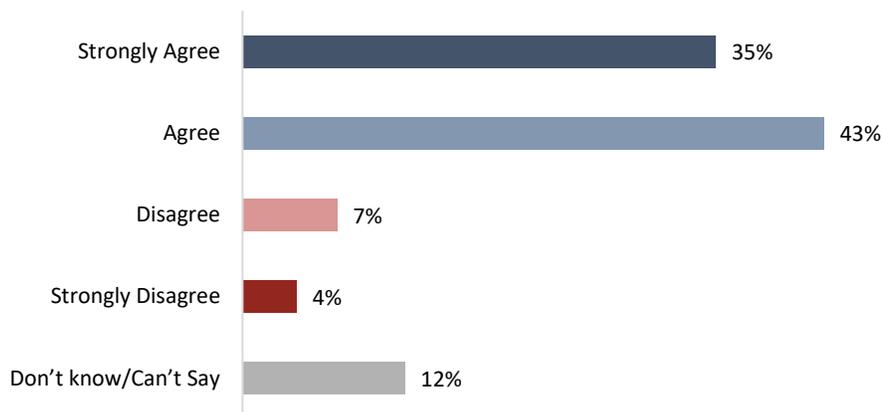
For detailed results by age, gender, region, education, and other demographics, click here.

For detailed results by awareness of digital government concept, click here.