Ipsos Public Affairs

PUBLIC PERSPECTIVES: PARTICIPATION IN THE DIGITAL ECONOMY 2.0

2016

Summary Profile of Very Low, Low and Moderate Internet Users

PROFILING CANADIANS BY DIGITAL PARTICIPATION

As usership increases, so does the participation in online activities. The greatest gaps are between very low/low users and high/very high users in the activities of online banking, health/medical research and booking travel.

VERY LOW AND LOW

Banking	32%	Interact with healthcare provider	1%
Book travel	11%	Organize events	2%
Research	35%	Read, watch, or listen to the news or other areas of interest	34%
Search for employment/ volunteer opportunities	5%	Email	63%
Health/medical research	12%	Use social media	33%
Government services	5%		

MODERATE

Banking	68%	Interact with healthcare provider	6%
Book travel	33%	Organize events	9%
Research	57%	Read, watch, or listen to the news or other areas of interest	67%
Search for employment/ volunteer opportunities	17%	Email	90%
Health/medical research	39%	Use social media	57%
Government services	17%		

HIGH OR VERY HIGH

Banking	82%	Interact with healthcare provider	10%
Book travel	63%	Organize events	40%
Research	85%	Read, watch, or listen to the news or other areas of interest	88%
Search for employment/ volunteer opportunities	52%	Email	96%
Health/medical research	63%	Use social media	84%
Government services	37%		

Percentages shown above for economic /health activities reflect the % who do the activity always or most of the time online.
Percentages shown above for social/cultural activities reflect the % who do the activity daily or at least 2-3 times per week.

PROFILING CANADIANS BY DIGITAL PARTICIPATION AND ATTITUDES

Ipsos Public Affairs

Usage/engagement increases as skill and comfort with the internet increases. Once users have the skills and comfort they need, they are able to access more diverse activities online such as entertainment.

VERY LOW AND LOW

When I am doing important things like registering for government services or banking I prefer to do it in-person so I know that I am doing it right.

I worry about the security of my personal information online.

I avoid activities online that require me to enter any personal information or accept privacy terms.

There are many things that I would like to do online, but don't know how.

I still do many things in-person or over the phone that I could do online simply out of habit.

MODERATE

The internet is easy to use.

Social media has become a platform for me to celebrate, vent, and not feel so alone.

What hinders you most - lack of motivation - you don't see the value of doing more things online or don't like to be on the Internet that much.

I avoid activities online that require me to enter any personal information or accept privacy terms.

HIGH OR VERY HIGH

Everyone has a right to be able to have access to the internet.

The internet is easy to use.

Social media has become a platform for me to celebrate, vent, and not feel so alone.

Entertainment offerings like being able to watch TV shows and movies that I can't get on regular cable.

DEMOGRAPHIC PROFILE

Canadian internet users who score high to very high on the digital engagement index are primarily younger – under the age of 54, are better educated and employed, living in a large city and in households earning $100,000 a year on average. In contrast, those who score very to low in the index skew older, are typically retired, are more likely to live in a rural area or town, and in households earning much less annually.

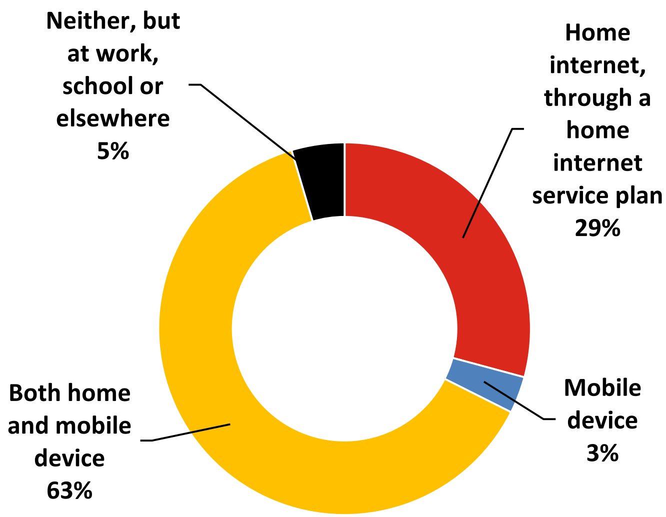
			DIGITAL PARTICIPATION				
		Total	Very Low (1,2)	Low (3)	Moderate (4)	High (5)	Very High (6,7)
			K	L	M	N	O
	Base	*1000*	*64**	*171*	*307*	*296*	*162*
GENDER	Male	50%	47%	51%	48%	50%	57%
	Female	50%	56%	50%	49%	52%	46%
AGE	18 to 34	29%	2%	9%	22% [KL]	39% [KLM]	49% [KLMN]
	35 to 54	38%	24%	38% [K]	36%	40% [K]	43% [K]
	55 to 74	29%	51% [MNO]	45% [NO]	37% [NO]	19% [O]	8%
	75 plus	5%	24% [LMNO]	8% [NO]	6% [NO]	2%	-
	Average age	*46.8*	*63.8 [LMNO]*	*55 [MNO]*	*50 [NO]*	*41.3 [O]*	*37*
EDUCATION	High school or less	21%	29% [NO]	36% [MNO]	20% [O]	18%	11%
	Some college or university	39%	52% [LN]	37%	40%	38%	37%
	University or higher	40%	19%	27%	40% [KL]	45% [KL]	52% [KLM]
EMPLOYMENT STATUS	Employed (FT/PT)	50%	39%	52%	61% [K]	66% [KL]	74% [KLM]
	Retired	20%	52% [LMNO]	33% [NO]	25% [NO]	11% [O]	3%
LOCATION OF RESIDENCE	Rural and town	26%	43% [MNO]	39% [MNO]	25%	22%	17%
	Small city	15%	19%	14%	15%	15%	14%
	Large city	58%	39%	47%	59% [KL]	62% [KL]	70% [KLM]
CHILDREN	No	65%	92% [LMNO]	75% [NO]	71% [NO]	54%	55%
INCOME (excludes no responses)	<$25K	9%	15% [O]	16% [MNO]	8%	7%	4%
	$25K to $50K	21%	37% [LMNO]	22%	19%	24% [O]	14%
	$50K to less than $75K	16%	11%	21%	17%	14%	16%
	$75K to less than $100K	18%	24%	13%	22% [L]	16%	19%
	$100K plus	36%	13%	28% [K]	35% [K]	40% [KL]	47% [KLM]
	Average income	*$90.9K*	*$62.6K*	*$75.5K*	*$92.3K [KL]*	*$93.1K [KL]*	*$106.4K [KLMN]*

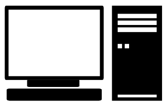
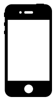
Internet Use

ACCESS PROFILE

Very low and low users are nearly twice as likely to access the internet only at home through a home internet service plan compared to the average Canadian internet user. Very low users are nearly 6 times more likely than the average Canadian to access the internet only at work, school or elsewhere (no home or mobile access).

Accessing the Internet
(internet users only)



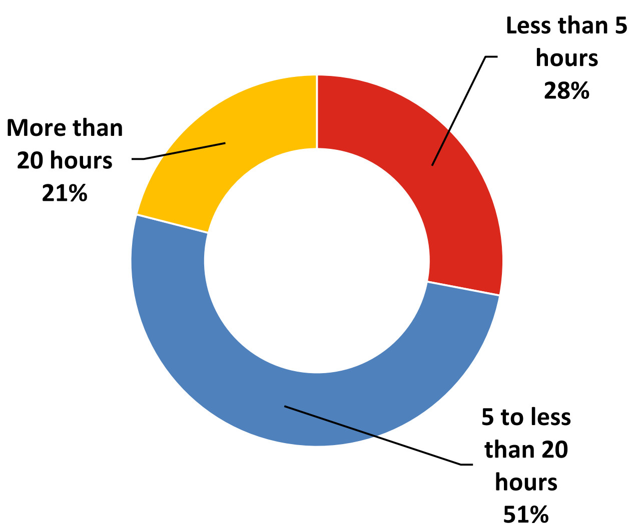
		DIGITAL PARTICIPATION				
	Total	Very Low	Low	Mod.	High	Very High
		K	L	M	N	O
Base	*1000*	*60**	*165*	*297*	*305*	*173*
	29%	**57% MNO**	**52% MNO**	**33% NO**	**19% O**	**10%**
	3%	2%	4%	2%	3%	5%
BOTH	63%	15%	**40% K**	**61% KL**	**75% KLM**	**84% KLMN**
Neither, but elsewhere	5%	**27% LMNO**	**5% O**	**4% O**	3%	1%

Q1Z. HOW DO YOU ACCESS THE INTERNET? (READ LIST)
BASE: ALL RESPONDENTS (N=1000)

INTERNET USAGE PROFILE

Unsurprisingly, very low users spend relatively less time online – these users are twice as likely as the average internet user to spend less than 5 hours per week online. Moderate users spend more time online – about half spend between 5 and 20 hours per week, which is on par with the average internet user.

Hours Spent on Internet per Week



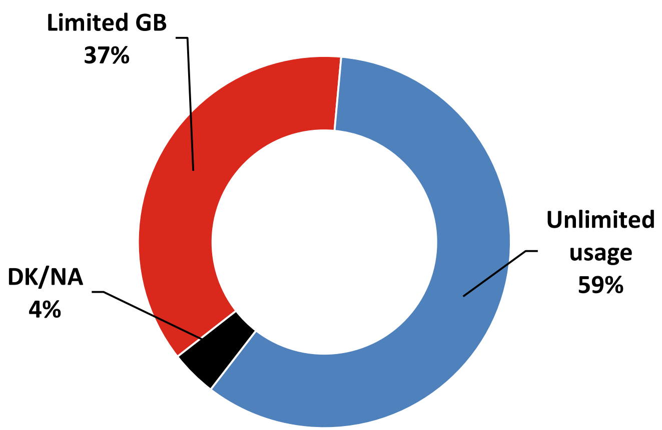
		DIGITAL PARTICIPATION				
	Total	Very Low	Low	Mod.	High	Very High
		K	L	M	N	O
Base	*1000*	*60**	*165*	*297*	*305*	*173*
<5 hours	28%	**65%** [LMNO]	**45%** [MNO]	**32%** [NO]	15%	15%
5 to <20 hours	51%	29%	**47%** [K]	**52%** [K]	**59%** [KLO]	**47%** [K]
20 plus hours	21%	6%	8%	**16%** [KL]	**26%** [KLM]	**39%** [KLMN]

Q4. IN A TYPICAL WEEK, ON AVERAGE, HOW MANY HOURS DO YOU SPEND ON THE INTERNET FOR PERSONAL USE? IS IT...(READ LIST).
BASE: ALL RESPONDENTS (N=1,000)

HOME INTERNET PLAN PROFILE

Six out of ten Canadian internet users have unlimited usage plans. There is no relationship between the type of home internet plan users have and how engaged they are in the digital economy. Very low and low users are as likely to have an unlimited plan as the average Canadian internet user.

Unlimited Plans versus Limited GB Plans



		DIGITAL PARTICIPATION				
	Total	**Very Low**	**Low**	**Mod.**	**High**	**Very High**
		K	L	M	N	O
Base	*848*	*44*	*152*	*269*	*250*	*133*
Limited GB	37%	27%	31%	39%	38%	41%
Unlimited Usage	59%	62%	65%	58%	59%	55%
Do not subscribe to *(broadband) Internet at home*	0%	-	-	-	1%	-
(DK/NS)	4%	**10%** N	3%	4%	3%	4%

Q2. DOES YOUR HOME INTERNET SERVICE PLAN HAVE UNLIMITED USAGE OR DO YOU PAY FOR A CERTAIN AMOUNT OF USAGE (GIGABITS) PER MONTH?
BASE: ACCESS THE INTERNET AT HOME: TOTAL (N=848)

Motivations and Barriers to Digital Engagement

MOTIVATIONS OF DIGITAL ENGAGEMENT: INTERNET APPEAL

Highly engaged users place greater focus on the entertainment value of the internet, while those who are less engaged are driven by the convenience of accessing information and other online functional activities. However, the internet as a means of keeping in touch with family/friends holds most appeal for internet users as a total group.

What is the most appealing aspect of internet?

		DIGITAL PARTICIPATION				
	TOTAL	Very Low	Low	Moderate	High	Very High
		K	L	M	N	O
Base	*1000*	*60**	*165*	*297*	*305*	*173*
The ease of being able to keep in touch with family and friends	**62%**	42%	62% K	64% K	67% K	59% K
The convenience of being able to get chores like banking and government services done without having to go in-person	**49%**	17%	50% K	55% K	51% K	46% K
The entertainment offerings like being able to watch TV shows/movies that I can't get on regular cable	**34%**	18%	23%	31% K	40% KLM	42% KLM
(Convenient/ quick) access to information	**13%**	23% MNO	14%	12%	11%	12%
The social aspect of being able to connect with new people w. common interests	**11%**	7%	9%	11%	10%	16%
Being able to share my opinions on issues that are important to me	**6%**	3%	7%	5%	6%	7%
Utilizing internet search/ research purposes	**5%**	11% MNO	8% N	4%	3%	4%
Other	**8%**	25% LMNO	10%	7%	5%	5%
Don't know/none	**2%**	12% LMNO	3%	1%	1%	2%

STATED BARRIERS OF DIGITAL PARTICIPATION

Internet users in the very low, low and moderate segment perceive online security and lack of motivation as greater barriers than those who are more highly engaged. The very low and low segment also tend to under-report their 'lack of capability' (knowledge or skill) as a barrier to greater digital participation. Consistent with previous research, 'lack of opportunity' is not an indicated barrier to online engagement for the vast majority (only 4% state this is their primary barrier).

Stated Reasons for Level of Participation

		DIGITAL PARTICIPATION				
	TOTAL	Very Low	Low	Moderate	High	Very High
		K	L	M	N	O
Base	*1000*	*60**	*165*	*297*	*305*	*173*
LACK OF SECURITY, (*i.e. not feeling comfortable doing things online that require your personal info)*	**26%**	45% MNO	31% O	25%	24%	22%
LACK OF MOTIVATION, *(i.e. don't see value of doing more things online/don't like to be on the Internet that much)*	**15%**	21% NO	19% NO	23% NO	10%	6%
LACK OF AWARENESS, *(i.e. there are things you can do online that you probably don't know about)*	**12%**	7%	11%	12%	14%	12%
LACK OF CAPABILITY, (i.e. incl. lack of skills/knowledge on how to use/fully use all of the things avail. on internet)	**6%**	12% N	12% MNO	5%	4%	5%
LACK OF OPPORTUNITY, *(i.e. incl. lack of access/not being able to afford greater access e.g. through mobile device)*	**4%**	3%	3%	4%	5%	6%
NONE OF THE ABOVE, *(i.e. I think I am taking full advantage of the Internet right now)*	**35%**	9%	23% K	30% K	42% KLM	49% KLM
Don't know	**2%**	4% O	2%	2%	1%	-

Q13. WHEN ALL IS SAID AND DONE, WHICH OF THE FOLLOWING THINGS WOULD YOU SAY HINDERS YOU THE MOST FROM TAKING FULL ADVANTAGE OF THE INTERNET, AND USING IT TO PARTICIPATE IN THE DIGITAL ECONOMY? FOR EXAMPLE, THE ABILITY TO ACCESS E-GOVERNMENT SERVICES, SOCIAL SITES AND CONNECTIONS, E-LEARNING, HEALTH RELATED SERVICES, ENTERTAINMENT, AND GOODS AND SERVICES. PLEASE SELECT ONE ONLY.
BASE: ALL RESPONDENTS (N=1,000)

BARRIERS TO DIGITAL ECONOMY: AWARENESS

Lack of awareness is a barrier for only a few specific digital economy activities which are largely government services and healthcare related. However, results overall don't indicate that awareness is a leading barrier.

Awareness of Online Activity—Yes

		DIGITAL PARTICIPATION				
		Very Low	Low	Moderate	High	Very High
		K	L	M	N	O
Booking travel or hotel reservations	86%	79%	85%	86%	93%	100%
Most of your banking	84%	80%	80%	87%	100%	100%
Search for employment, or apply for a job or volunteer positions	80%	76%	77%	81%	88%	90%
Organizing social or community activities, such as a party/event	74%	67%	72%	77%	79%	80%
Finding trustworthy info for work, school or a personal interest	72%	62%	73%	85%	56%	100%
Finding trustworthy health or medical information online	68%	63%	60%	78%	68%	100%
Access government services (renewing a driver's license/health card	58%	62%	69%	59%	43%	36%
Book health appointments with your health care provider online	38%	43%	42%	36%	36%	37%

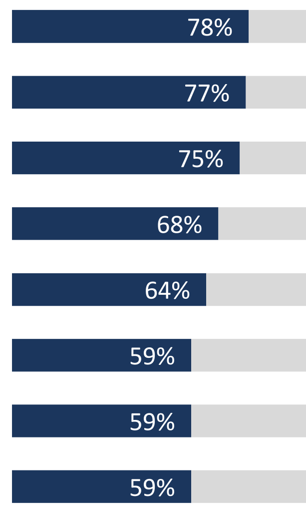
Q6. DID YOU KNOW THAT YOU CAN DO THE FOLLOWING ACTIVITIES ONLINE [INSERT 1ST ITEM]. THE NEXT ONE IS [INSERT 2ND ITEM, ETC]. (REPEAT SCALE ONLY IF NECESSARY). BASE: WHO REPORTED THAT THEY NEVER DO THIS ACTIVITY ONLINE (N SIZE VARIES BY ACTIVITY).
* RE-BASED TO FULL INTERNET POPULATION, THUS PERCENTAGE NOT SHOWN ON THIS SLIDE.

BASE: THOSE WHO REPORTED THAT THEY NEVER DO THIS ACTIVITY ONLINE (N SIZE VARIES BY ACTIVITY).

BARRIERS TO DIGITAL ECONOMY: CAPABILITY

Lack of knowledge is a greater barrier to online activities for low and very low users (vs. all others), specifically for banking, organizing social activities and booking health appointments online as respondents indicate they don't have the skill set to perform these activities. Capability is much less of a barrier for those who use the internet more often.

Capability of Online Activity—Definitely/Probably



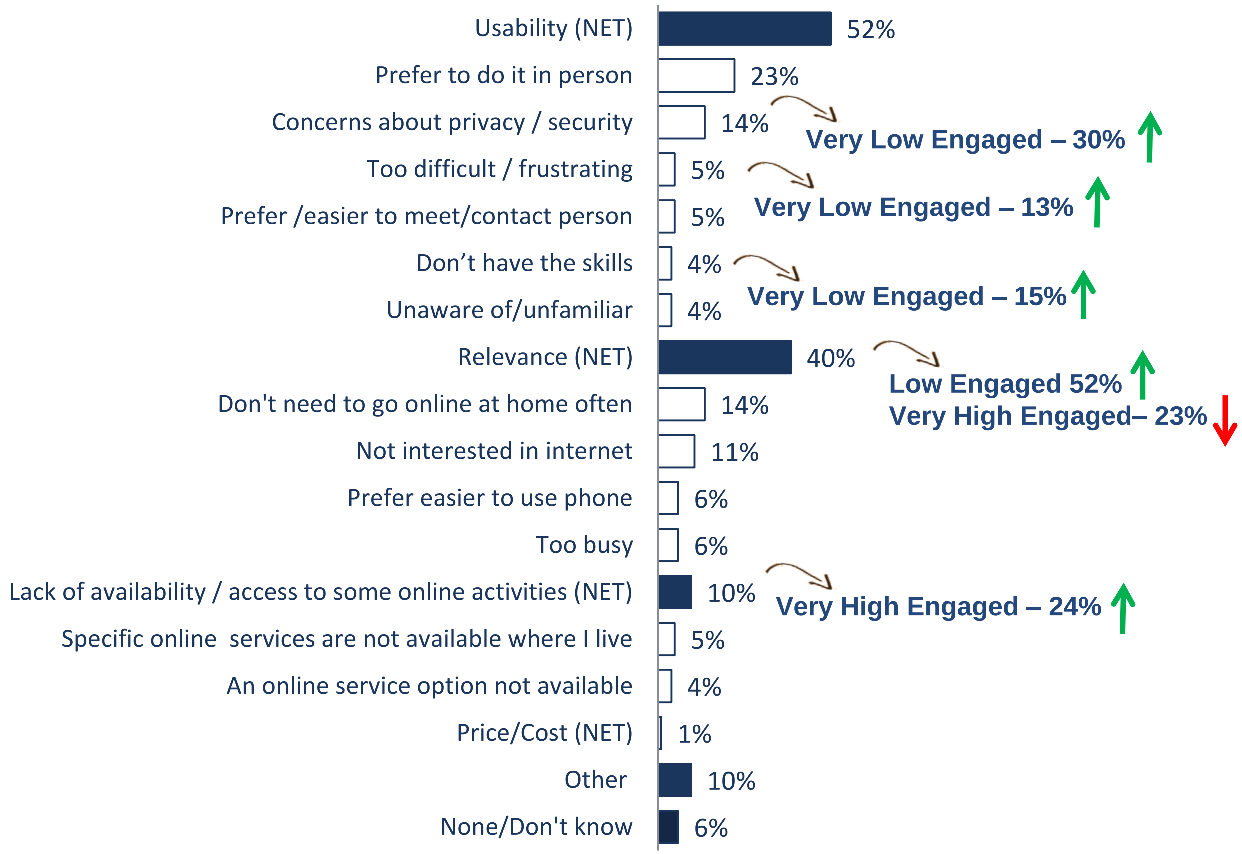
Capability of Online Activity—Definitely/Probably		DIGITAL PARTICIPATION				
		Very Low	Low	Moderate	High	Very High
		K	L	M	N	O
Search for employment, or apply for a job or volunteer positions	78%	50%	66%	**84%** [KL]	**94%** [KLM]	91%
Find or download trustworthy information for work, school or a personal interest	77%	67%	72%	90%	79%	100%
Book travel or hotel reservations online	75%	52%	**79%** [K]	**78%** [K]	**84%** [K]	68%
Access government services such as renewing a driver's license or health card	68%	47%	**66%** [K]	**69%** [K]	**80%** [KLM]	67%
Find or download trustworthy health or medical information online	64%	50%	56%	**77%** [KL]	69%	100%
Do you online banking	59%	41%	52%	79%	77%	44%
Organize social or community activities, such as a party or event	59%	34%	**56%** [K]	**57%** [K]	**77%** [KLM]	74%
Book health appointments with your health care provider online	59%	29%	**51%** [K]	**58%** [K]	**69%** [KLM]	**71%** [KL]

Q7. IF YOU WERE TO TRY TO DO THESE ACTIVITIES ONLINE FOR THE FIRST TIME OR MORE OFTEN THAN YOU HAVE BEEN, WOULD YOU KNOW HOW TO? HOW ABOUT [INSERT 1ST ITEM]. THE NEXT ONE IS [INSERT 2ND ITEM, ETC]. (REPEAT SCALE ONLY IF NECESSARY). BASE: WHO REPORTED THAT THEY RARELY OR NEVER DO THIS ACTIVITY ONLINE (N SIZE VARIES BY ACTIVITY).
* RE-BASED TO FULL INTERNET POPULATION, THUS PERCENTAGE NOT SHOWN ON THIS SLIDE.

BASE: THOSE WHO REPORTED THAT THEY RARELY O

REASONS FOR NOT DOING CERTAIN ACTIVITIES ONLINE

The greatest distinction is within the very low segment in terms of online activity barriers. These barriers are largely based in usability including concerns about privacy/security and finding the internet difficult to use. Highly engaged users are more likely to indicate that they simply prefer to do certain activities online or in cases where they can't, the issue is lack of online service availability vs. preference.



3% and under not shown within NETs

Q9. [TOTAL MENTIONS] THINKING ABOUT THE ACTIVITIES YOU DON'T TEND TO DO ONLINE REGULARLY, WHAT ARE THE MAIN REASONS YOU DO NOT DO THESE ACTIVITIES ONLINE MORE OFTEN? Q9A. ANYTHING ELSE?
BASE: ALL RESPONDENTS (N=1,000)

Background, Objectives and Methodology

BACKGROUND AND OBJECTIVES

BACKGROUND

- Ipsos continues to be at the forefront of understanding consumer and citizen behaviour when it comes to the digital economy. Our syndicated series *Participation in the Digital Economy* seeks to understand how Canadians are adopting and engaging on the internet. The first study, *Participation in the Digital Economy 1.0* (2015), found that relevance, or lack thereof, was a main driver for many towards subscription to the internet and engagement in the digital economy, i.e. those who see the value of the Internet in their lives are willing to pay for it, and those who don't are not.

OBJECTIVES

- In *Participation in the Digital Economy 2.0,* Ipsos explores in greater detail the barriers that prevent very low, low and moderate participants in the digital economy from becoming more fully engaged. Using the same index of engagement we developed in the first study, the specific objectives of *Participation in the Digital Economy 2.0* are to:
  - Establish a richer profile of the attitudes and behaviours of these very low, low and moderate participants.
  - Explore why these participants engage in the digital activities they do and why they do not engage in the ones that they don't.

METHODOLOGY

What?

- English and French national telephone survey – landline (70%) and cellphone (30%). A digital engagement index was developed based on the frequency with which internet users engage in various economic / health activities as well as social activities online.

Who?

- A sample of n=1000 people living in Canada, 18 years and older who have access to and use the internet.

Where?

- National - Canada

When?

- In field dates: April 4 – 18, 2016

How Many?

# OF RESPONDENTS	TOTAL
BC	140
MB	170
ON	390
QC	230
ATL	70
TOTAL # OF RESPONDENTS	**1000**

Note: Data has been weighted to match the demographic profile of internet users based on the Ipsos *Participation in the Digital Economy 1.0 study.* Some totals within the report may add up to more than 100% due to rounding. Asterisks denote small base sizes: 1) * small base size; 2) ** very small base size (under 30) is ineligible for significance testing. Statistical t-test at a 95% confidence interval was conducted. Significant differences between subgroups are indicated by lettering. The higher data point will have a letter beside it that corresponds with the sub-group of which it is significantly higher.

Ipsos Public Affairs (Canada)

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