



Digital Identity Research

August 2019

Canadians' Perspectives on Digital Identity

7 in 10



70% feel that a collaboration between the government and the private sector is **the best approach to creating a pan-Canadian digital ID framework.**

The remaining 3/10 were almost equally split:



16% thought the private sector should take the lead alone.

14% would prefer the government takes the reins on their own.

Even though

4 in 5



78% Canadians are concerned about their personal information being **compromised online**

approximately

2/3

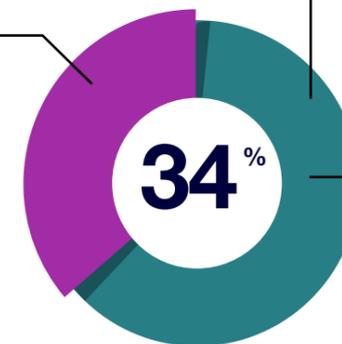
(68%) are willing to share personal information if it makes their online experience **more convenient.**



Canadians are concerned with how social media sites use their personal information

just one-third trust social media sites to keep their personal information

safe and secure



compared to ~4-in-5

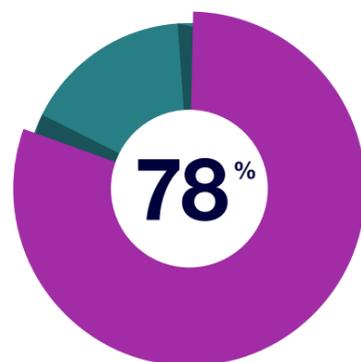
83% trusting the government



81% trust financial institutions



Nearly 4 out of 5



Canadians have taken action to safeguard their personal info online, the most common are:

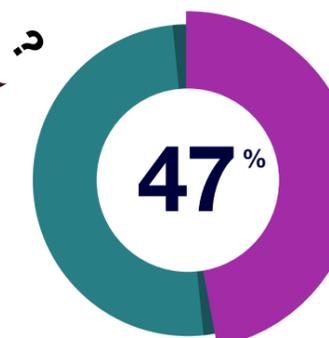


deleting cookies 53%



unsubscribing 50%

The concept of digital identity is still somewhat foreign to most Canadians; fewer than half

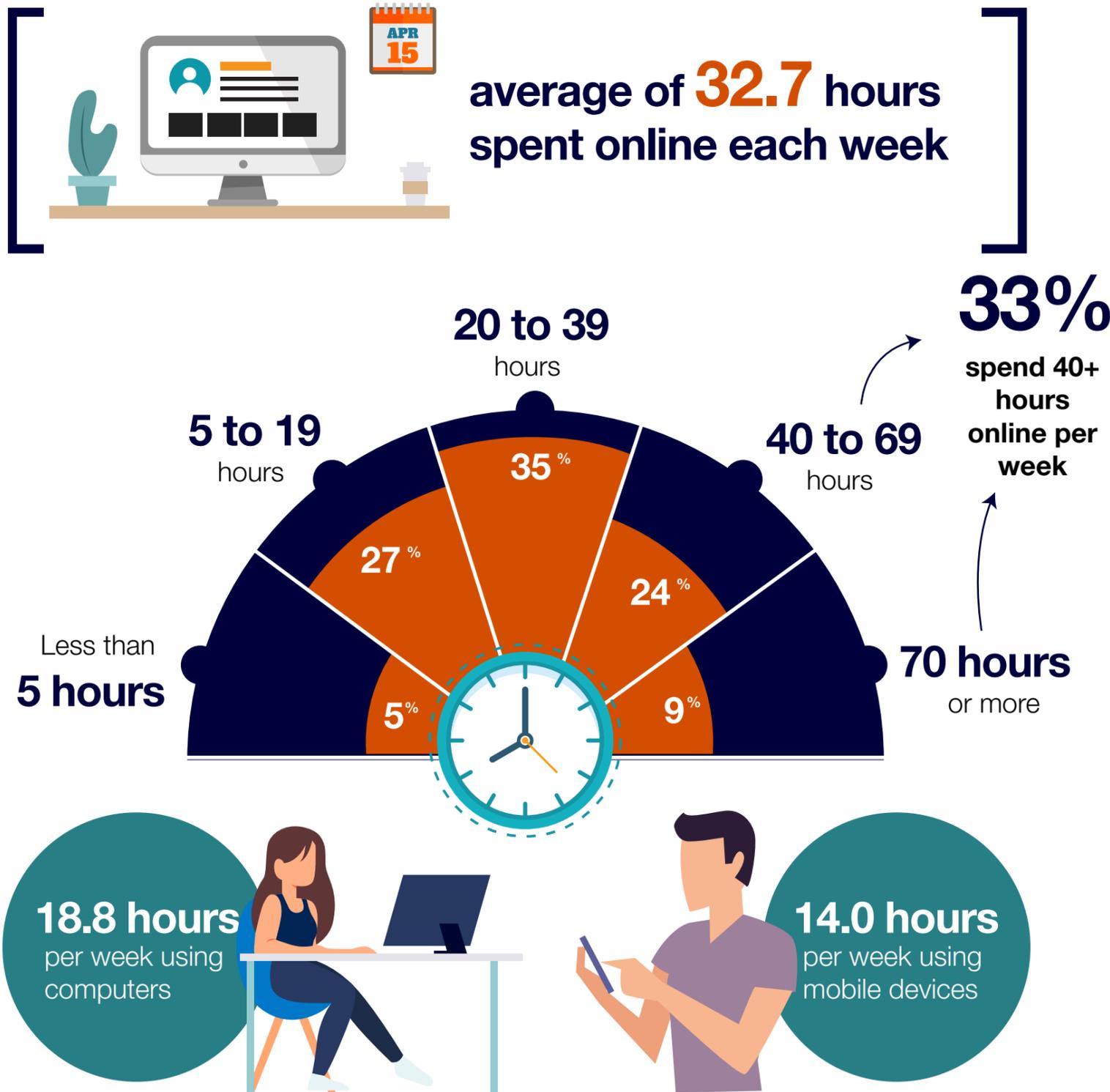


claim they are extremely or somewhat familiar with digital identity on an unaided basis.



Online Activity & Level of Comfort

On average, 32.7 hours are spent online each week.
A third spend 40+ hours online and do more online activities.



Typical Online Activities

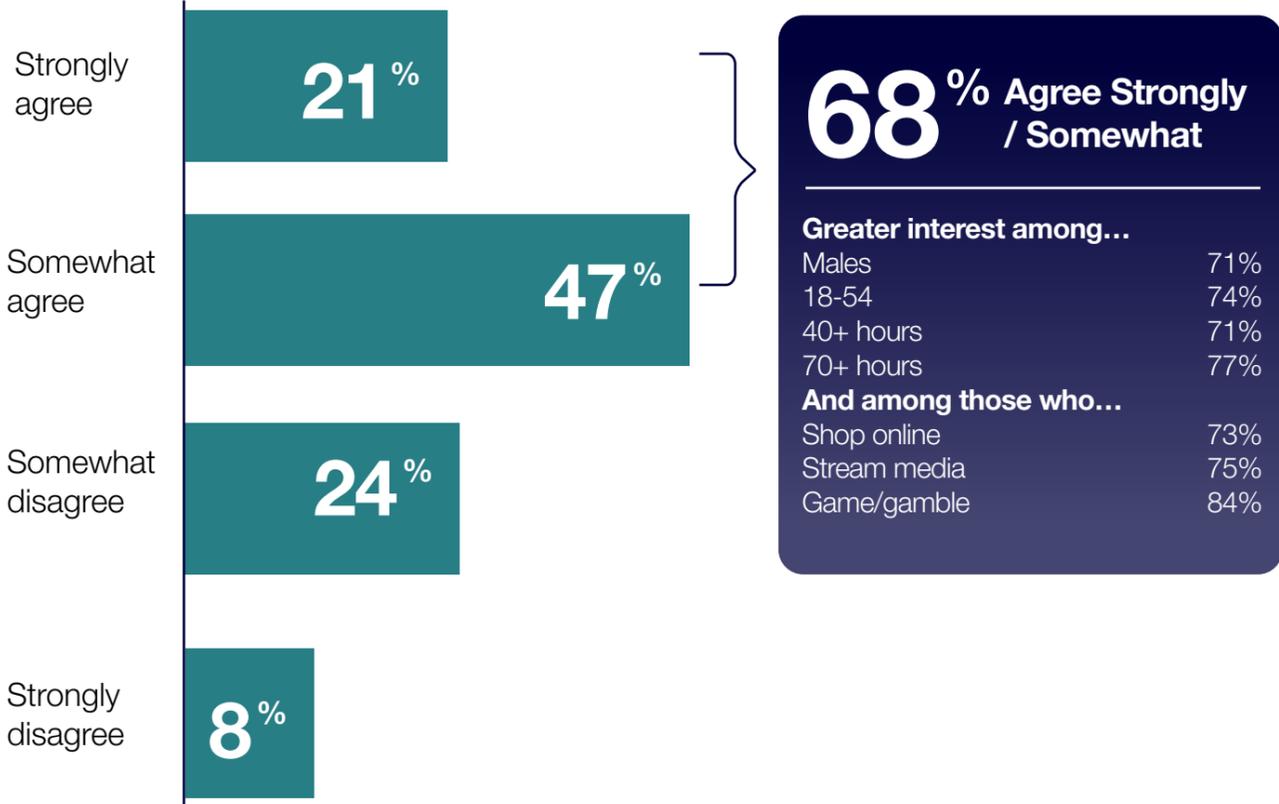
% doing this activity in a typical week	Overall	Among those online...	
		<40 hours	40+ hours
Online Browsing/Networking	98	97	100
Checking email	94	91	99
Visiting social media sites	74	69	84
Reading the news	67	62	79
Watching YouTube videos	67	62	78
Online Banking	72	66	83
Online Shopping	51	46	61
Streaming TV/Radio	52	45	67
Streaming TV	38	30	53
Listening to radio	34	29	42
Reading Blogs	29	24	40
Online gaming / Gambling	25	22	32
Online gaming	19	17	24
Online gambling	11	9	15

Q8) Approximately how many hours per week do you spend online using mobile devices (i.e. phone, tablet) and personal or work computers (i.e. laptop, desktop)?
Q9) Below is a list of online activities, please select all the activities you do online in a typical week.

Canadians are willing to share personal info online, but are also concerned about their information being compromised.

How strongly do you agree or disagree with the statement

I am willing to share more of my personal information online if it makes my experience online more convenient.



Overall, how concerned are you with your personal information being compromised online?

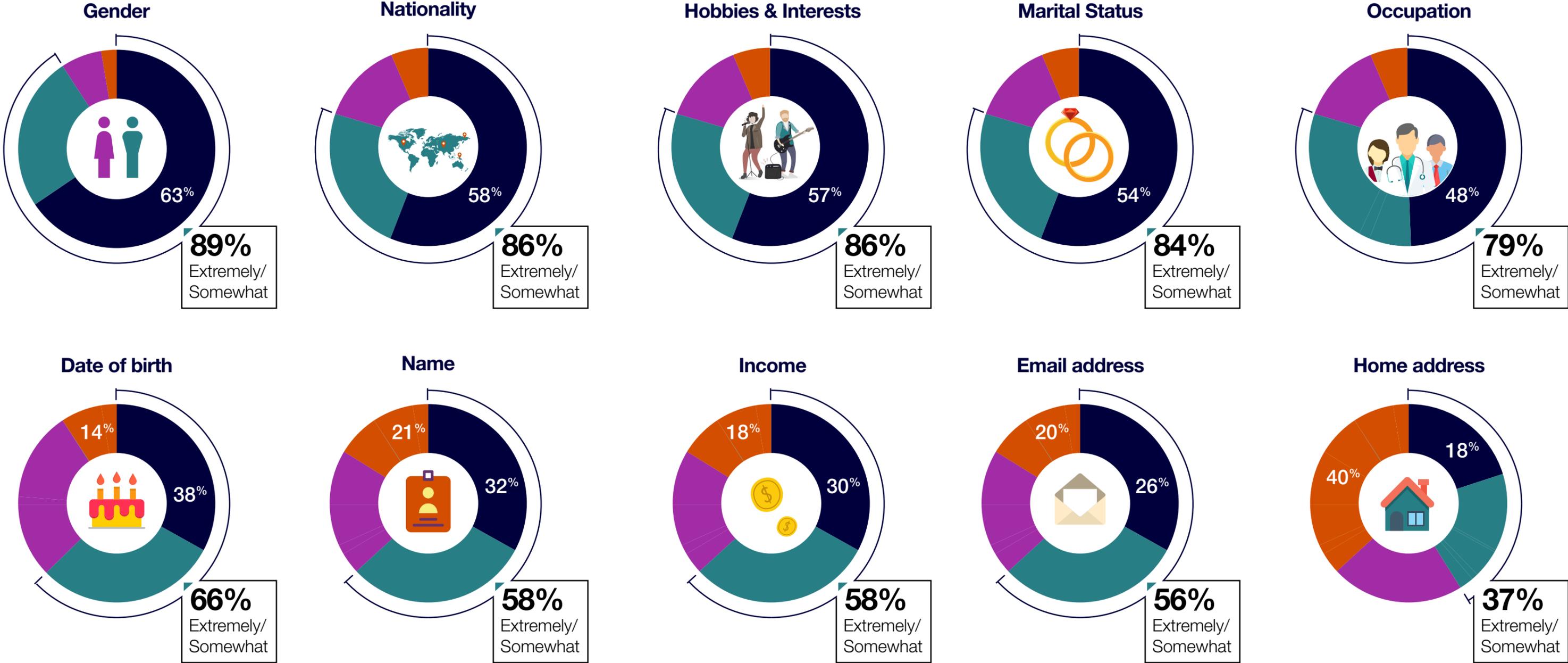


Q4) How strongly do you agree or disagree with the following statement: I am willing to share more of my personal information online if it makes my experience online more convenient.
 Q5) Overall, how concerned are you with your personal information being compromised online?

While comfortable sharing more generic information, Canadians are less comfortable sharing sensitive details such as home address, email, income, name and DOB.

How comfortable are you sharing each of the following types of personal information online?

● Extremely Comfortable ● Somewhat Comfortable ● Slightly Comfortable ● Not at all Comfortable

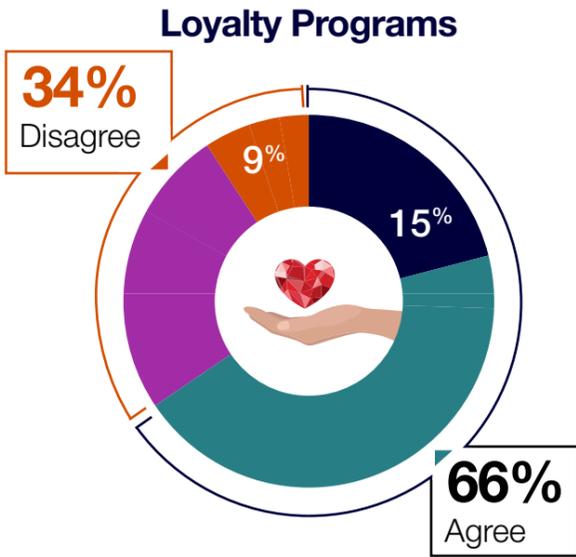
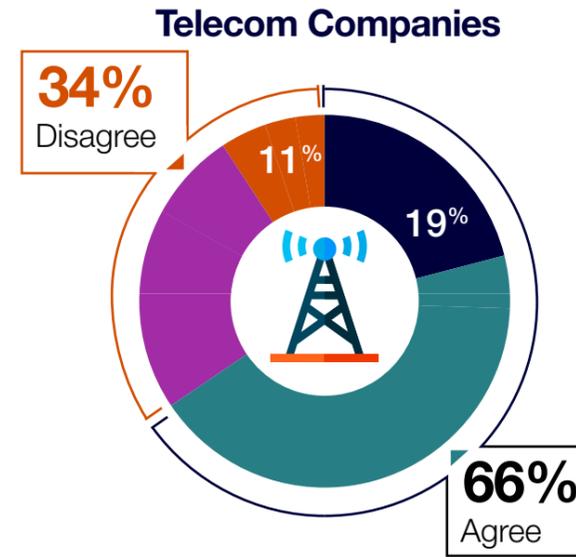
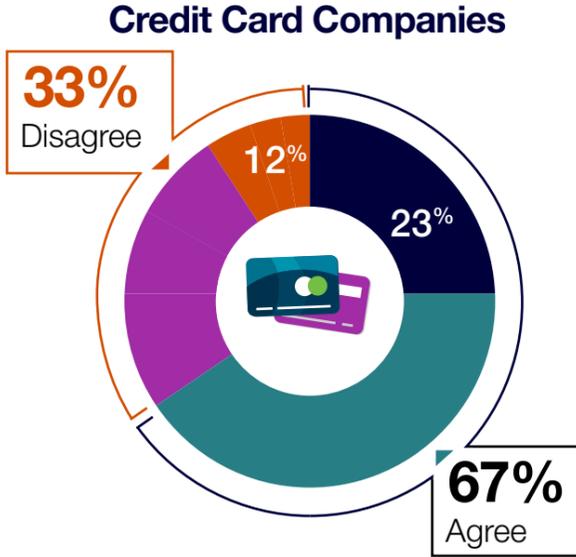
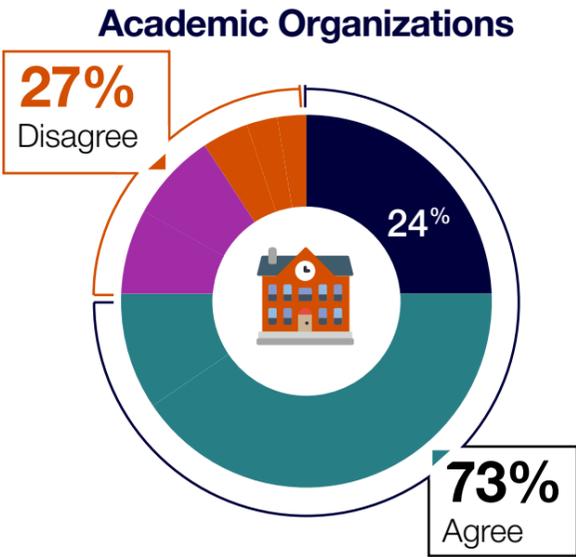
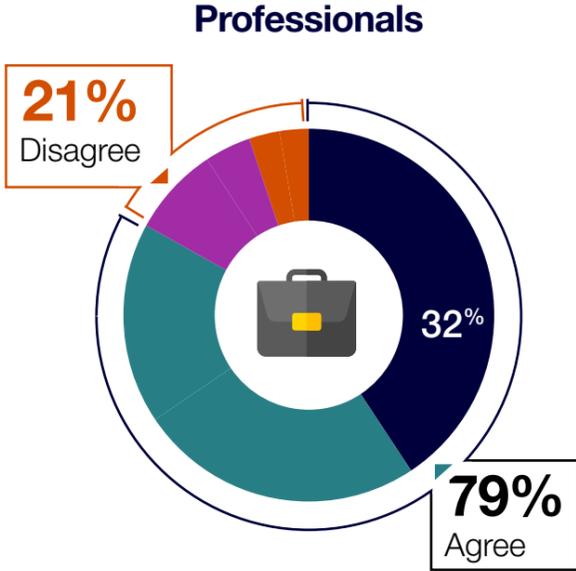
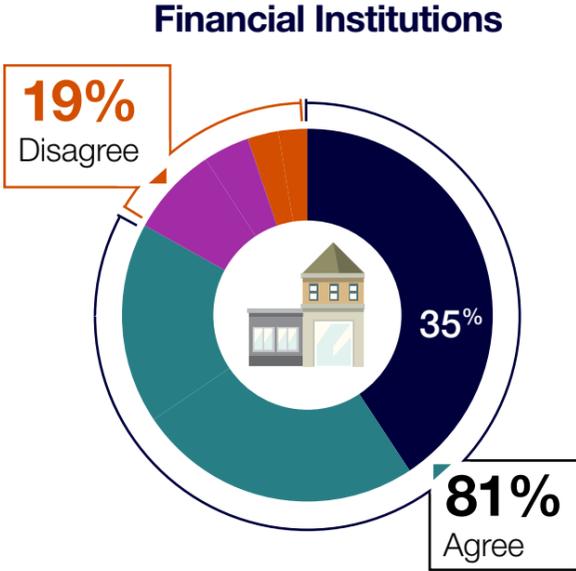
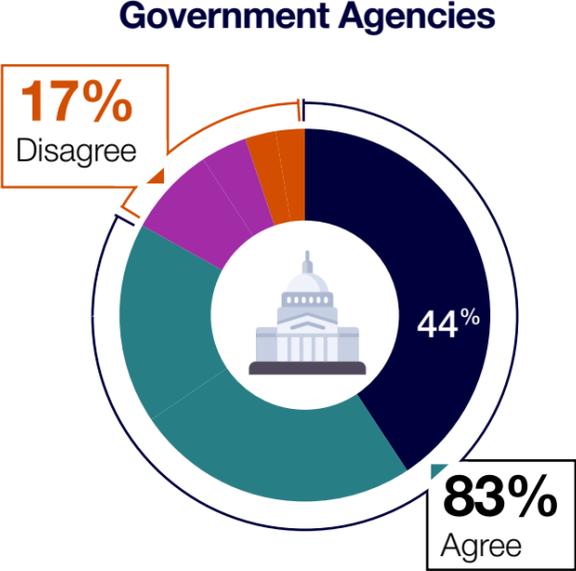
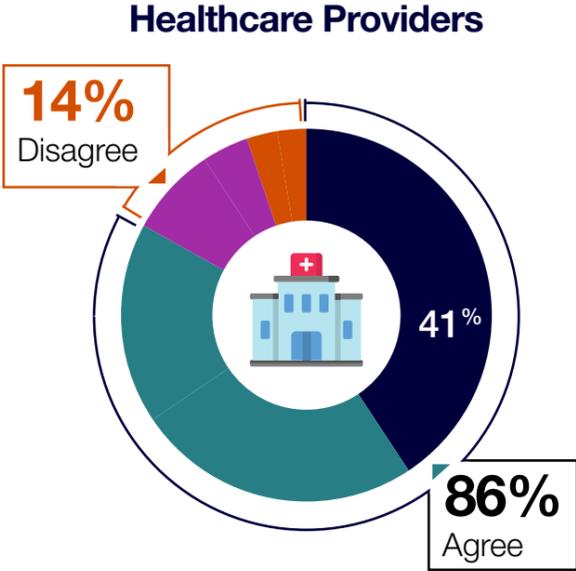


Q3) How comfortable are you sharing each of the following types of personal information online?

Canadians are least likely to trust social media sites, travel sites, internet providers and retail companies to safeguard their personal information.

How strongly do you agree or disagree...
that you trust each of the following to keep your personal information safe and secure?

● Strongly agree ● Somewhat agree ● Somewhat disagree ● Strongly disagree

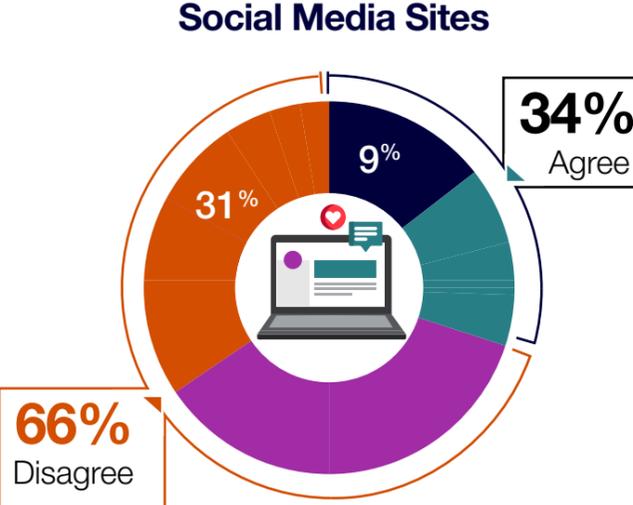
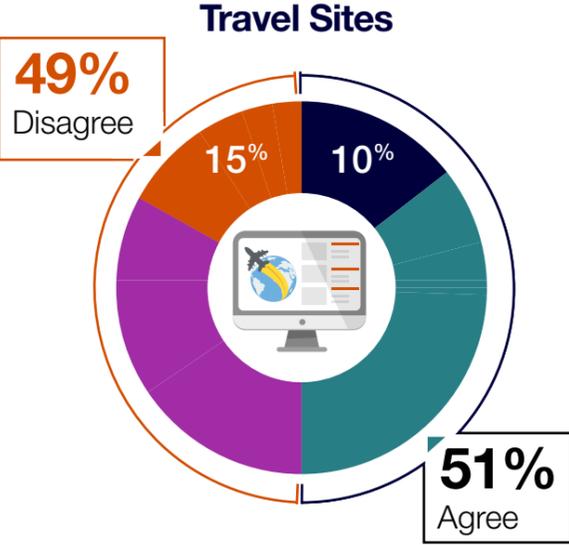
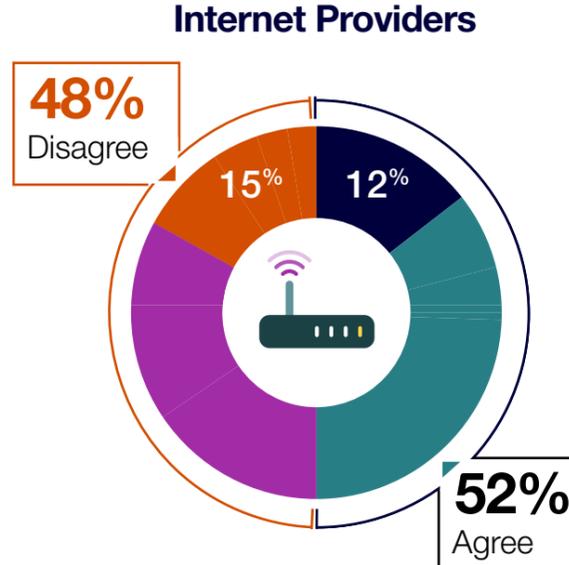
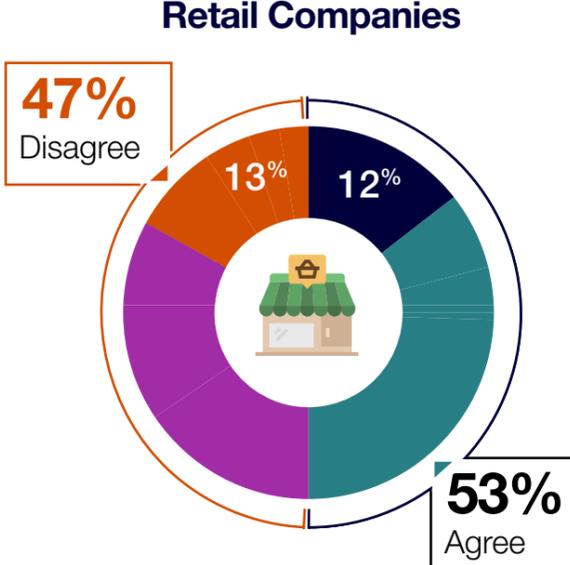
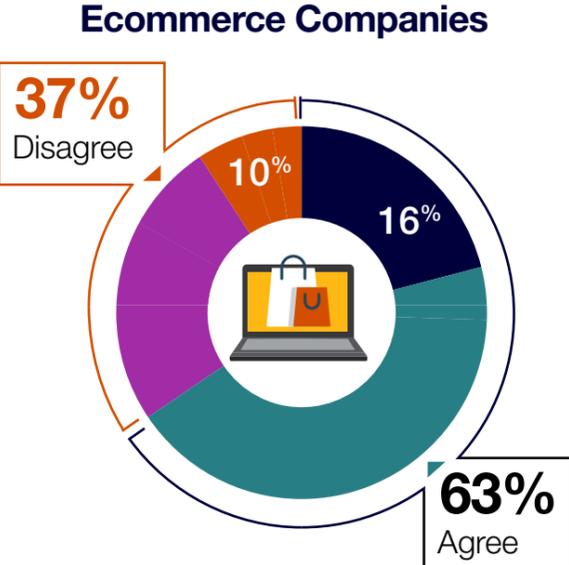


Q7) Below is a list of different types of organizations that store personal information of Canadians. How strongly do you agree or disagree that you trust each of the following to keep your personal information safe and secure?

Canadians are least likely to trust social media sites, travel sites, internet providers and retail companies to safeguard their personal information.

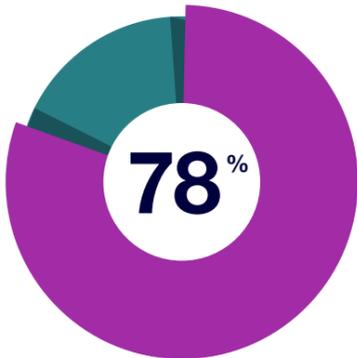
How strongly do you agree or disagree...
that you trust each of the following to keep your personal information safe and secure?

● Strongly agree ● Somewhat agree ● Somewhat disagree ● Strongly disagree



Q7) Below is a list of different types of organizations that store personal information of Canadians. How strongly do you agree or disagree that you trust each of the following to keep your personal information safe and secure?

Three-quarters have taken action to safeguard their personal info. Deleting cookies and unsubscribing are most common. Closing accounts or reducing online buying is less common.



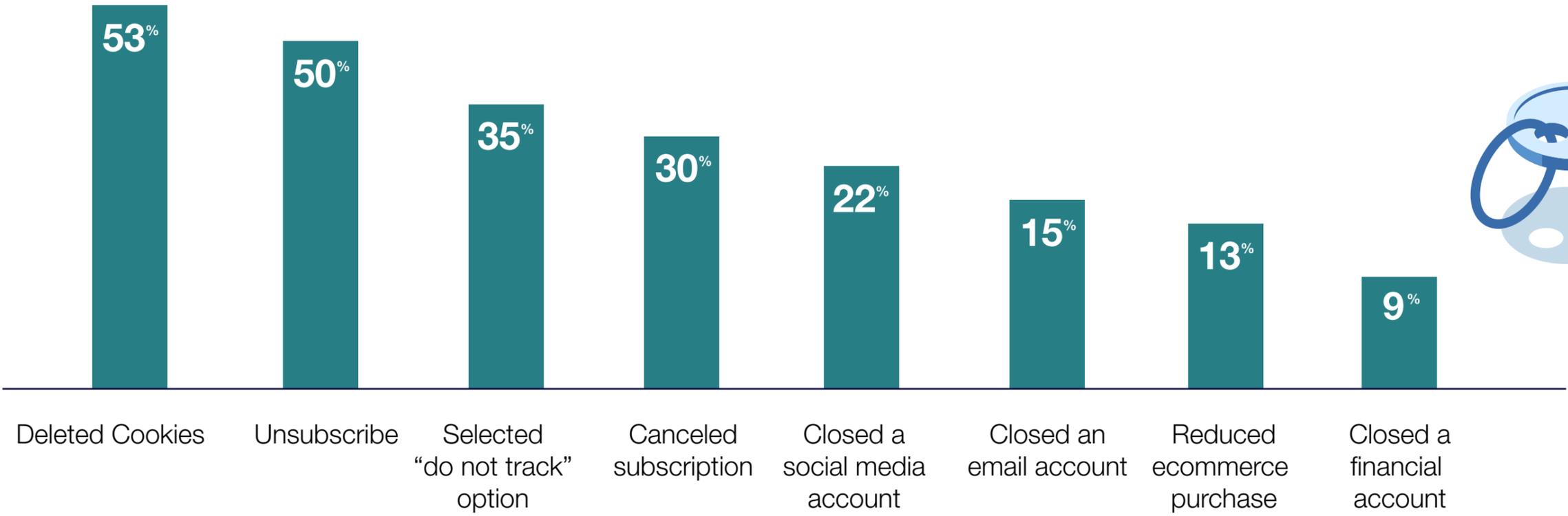
have taken action due to concerns about personal info being compromised

More common among those with greater internet usage:

40+ hours	83%
<40 hours	76%

And among those more concerned about their personal information:

Extremely/ somewhat concerned	81%
Less concerned	66%



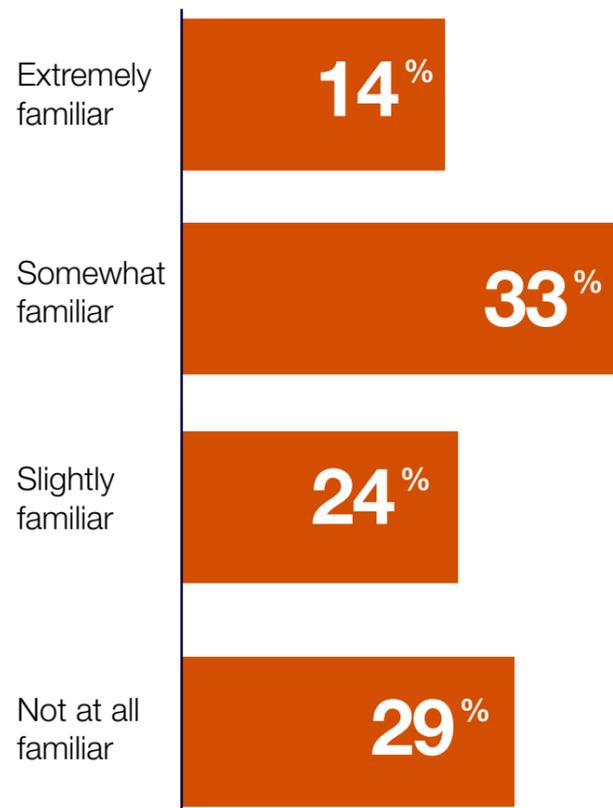
Q6) Which, if any, of the following actions have you taken due to concerns of your personal information being compromised?



Awareness & Use of Digital Identity

Roughly half are familiar with the concept of “digital identity”, and a variety of elements are associated with it. Most used are online passwords and knowledge-based questions.

How familiar are you with the concept of “digital identity”?



47% Extremely/Somewhat Familiar

Greater familiarity among...

Males	55%
18-34	67%
35-54	54%
\$100k+ HH income	66%
Univer./Post grad.	60%
40+ hours online	56%

No difference by level of concern about personal information:

Extremely/somewhat concerned	47%
Less concerned	48%



Online passwords

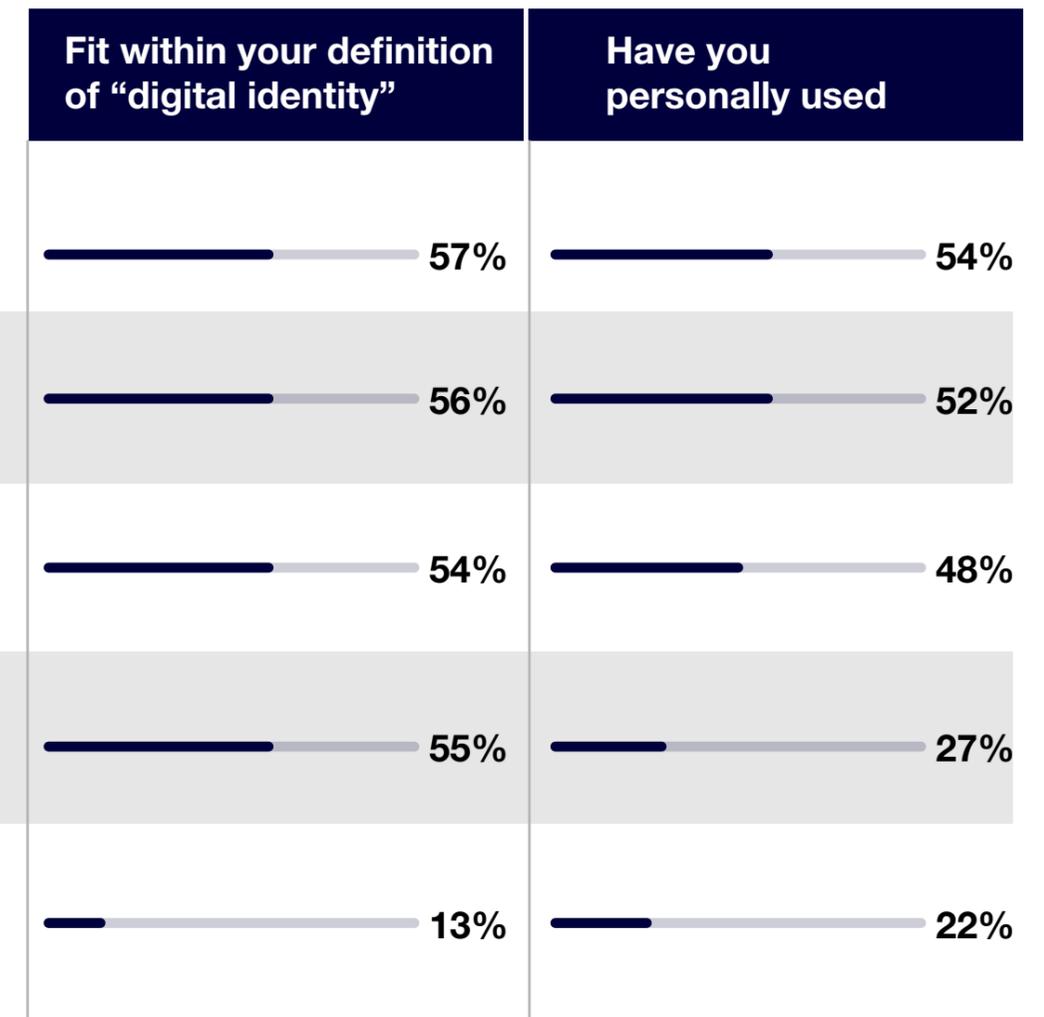
Answering knowledge-based questions digitally

Logging into social media accounts

Biometrics

None of the above

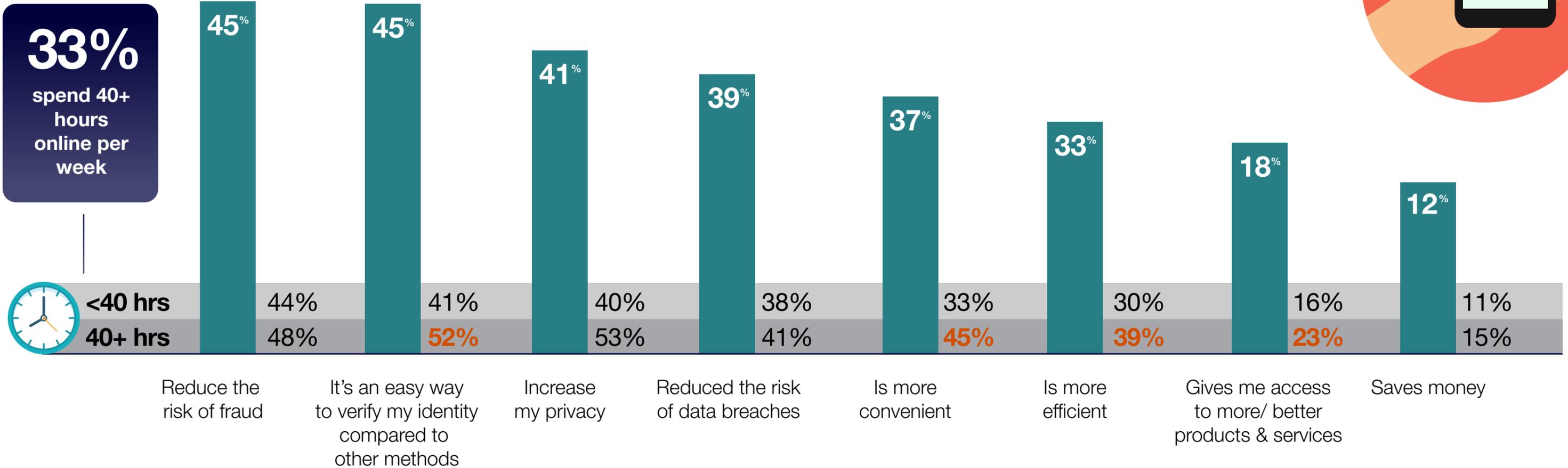
Which of the following...



Q10) How familiar are you with the concept of “digital identity”?
 Q11) Which, if any, of the following fit within your definition of “digital identity”?
 Q12/13) Have you personally used any of the following forms of digital identity?

Reducing fraud and being an easy way to verify one's identity are seen as the main benefits of "digital identity". Improved convenience/accessibility is a benefit for heavier online users.

Which of the following do you think are benefits of "digital identity"?



Q14) Which, if any, of the following do you think are benefits of "digital identity"?



Interest in Digital Identity

The majority of Canadians are interested in learning more about the benefits and capabilities of “digital identity”.

Now that you’ve heard a little more about “digital identity”, how interested are you in learning more about its benefits and capabilities?

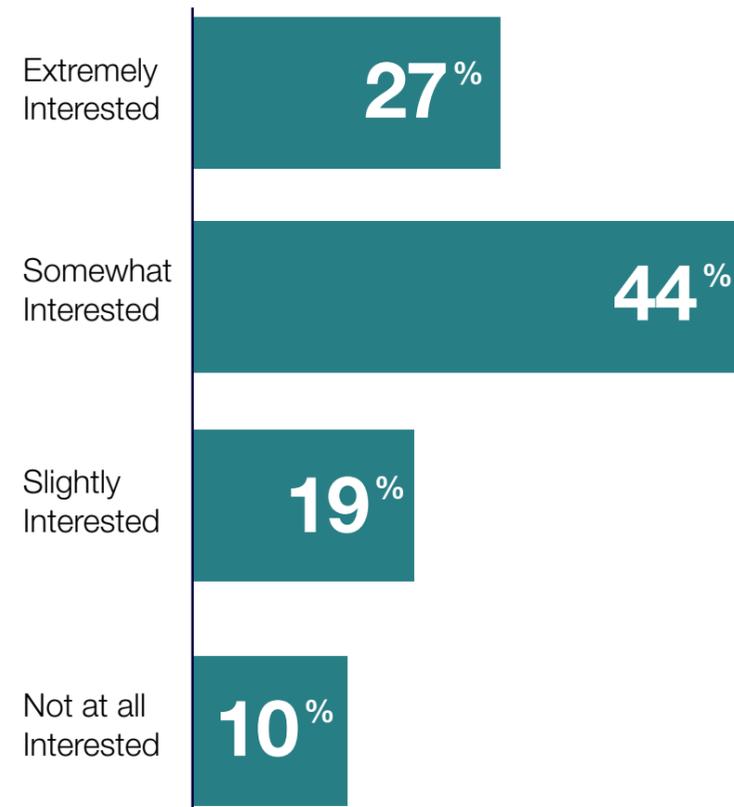
Definition of Digital Identity

A person’s digital identity is an amalgamation of attributes and information available online that can bind a persona to a physical person. It's similar to the way that your name and an ID card make up your identity in the physical world.

While digital ID can help to prevent fraud and increase privacy; it's also about asserting who we are in this society.



People are **interacting more and more online** making it necessary for businesses and government to adapt and ensure people claim who they are in the digital economy.



71% Extremely/Somewhat Interested

Higher among...

18-34	80%
\$60k+ HH income	78%
College/University Ed.	74%
40+ hours online	76%
Those extremely/somewhat familiar	87%

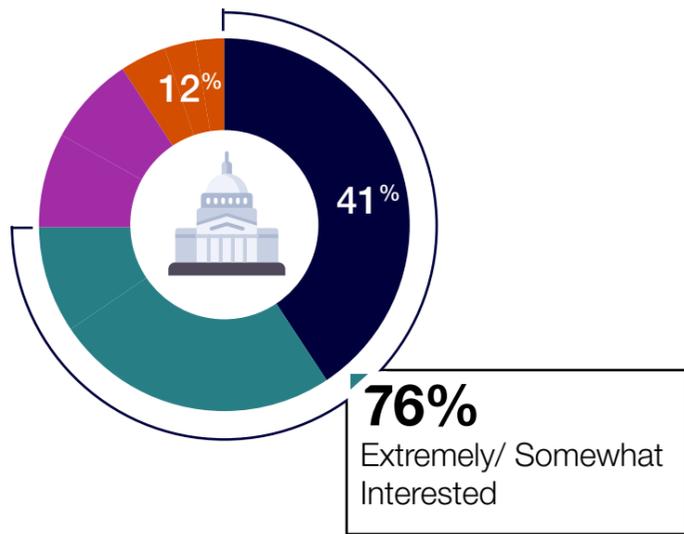
Q15) Now that you’ve heard a little more about “digital identity”, how interested are you in learning more about its benefits and capabilities?

There is interest in using digital ID authentication with a variety of organizations, particularly with government agencies, financial institutions and healthcare providers.

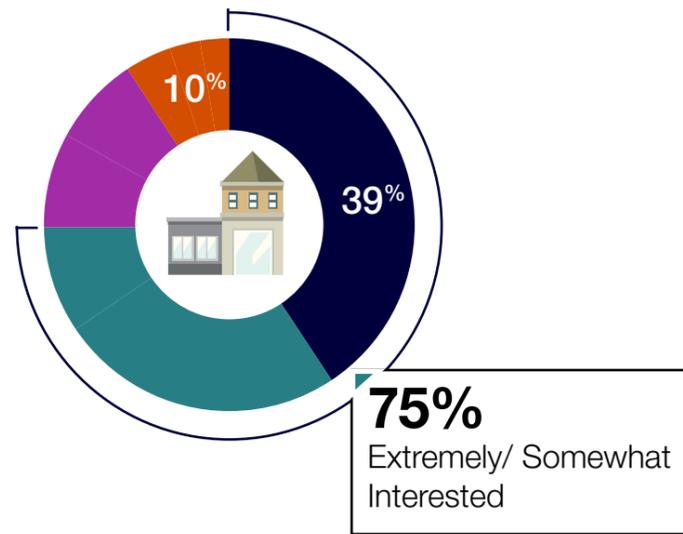
How interested are you in verifying your online identity through digital ID authentication with these organizations?

● Extremely Interested ● Somewhat interested ● Slightly interested ● Not at all interested

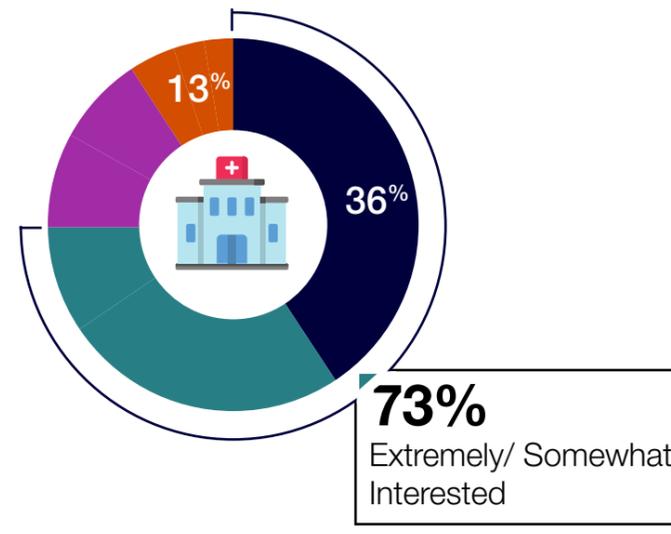
Government Agencies



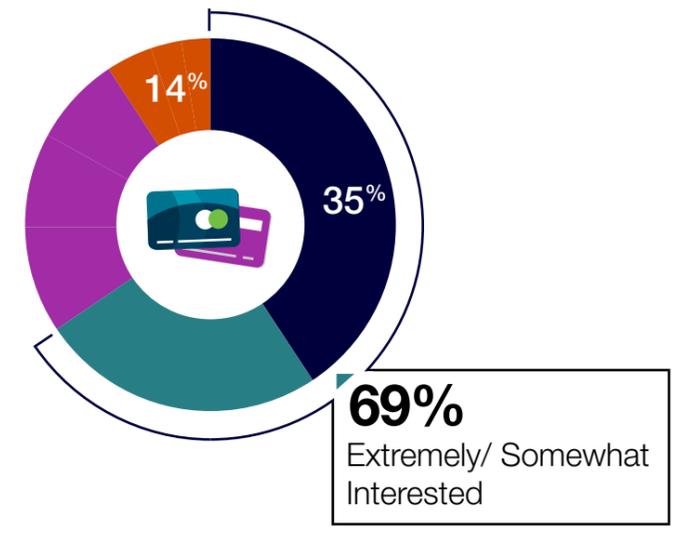
Financial Institutions



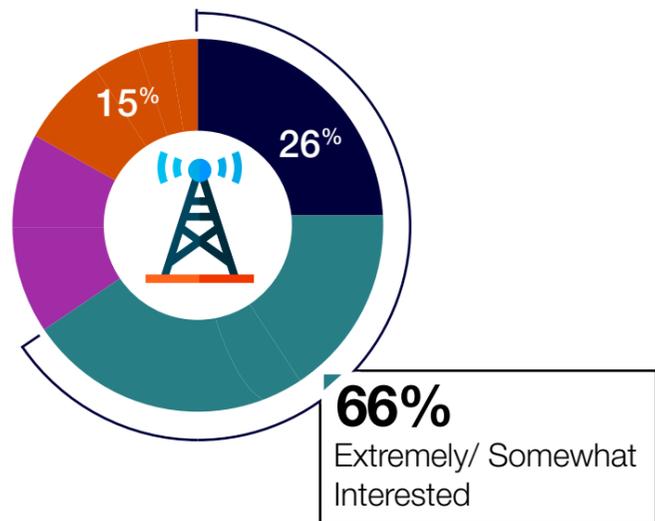
Healthcare Providers



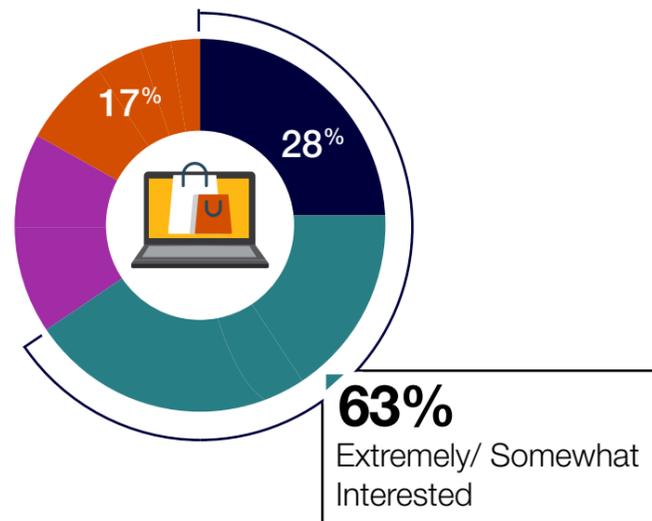
Credit card Companies



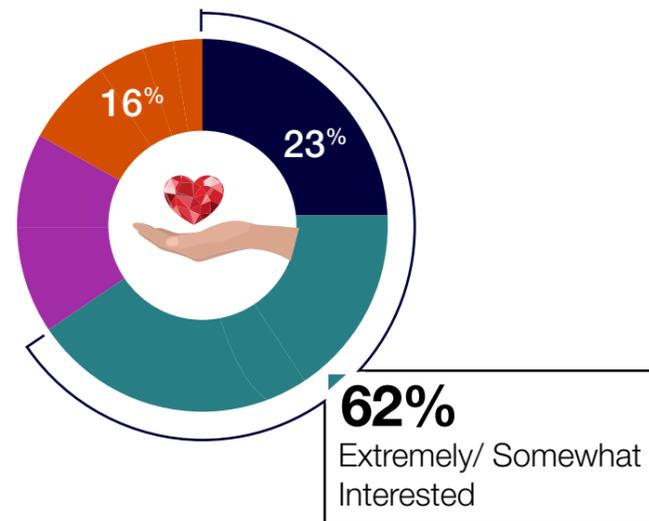
Telecom Companies



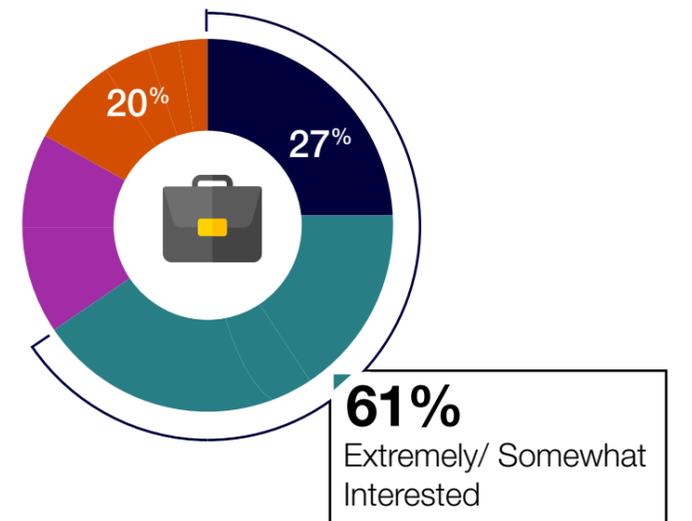
Ecommerce Companies



Loyalty Programs



Professionals



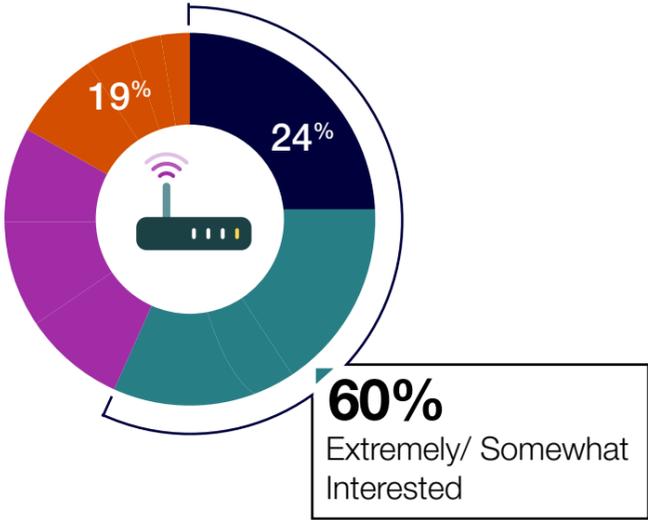
Q16) How interested are you in verifying your online identity through digital ID authentication with each of the following types of organizations?

There is interest in using digital ID authentication with a variety of organizations, particularly with government agencies, financial institutions and healthcare providers.

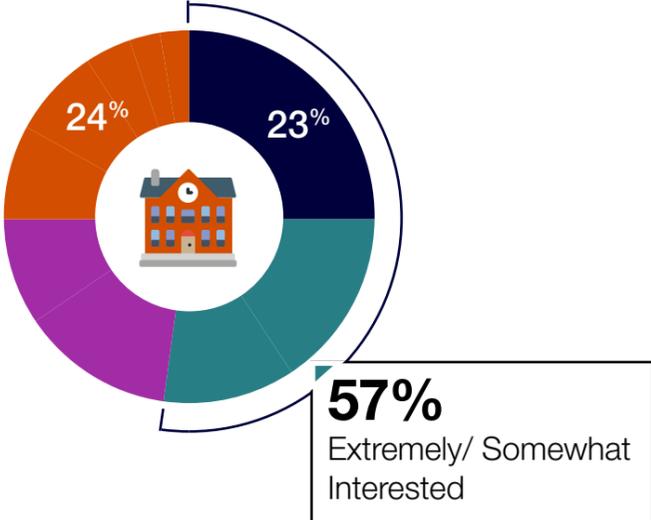
How interested are you in verifying your online identity through digital ID authentication with these organizations?

● Extremely Interested ● Somewhat interested ● Slightly interested ● Not at all interested

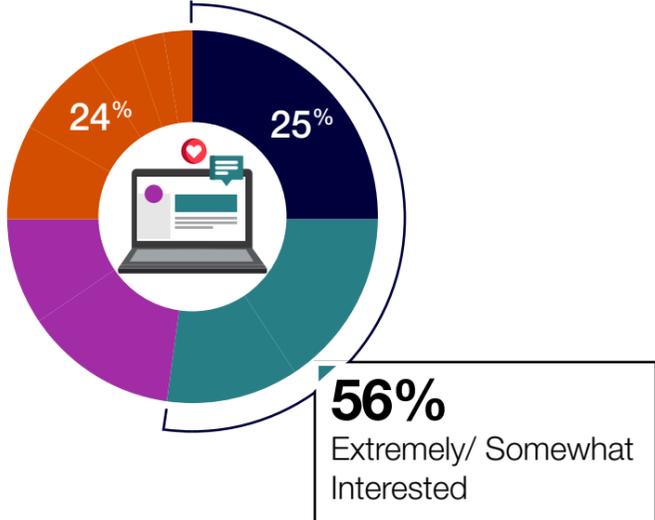
Internet Providers



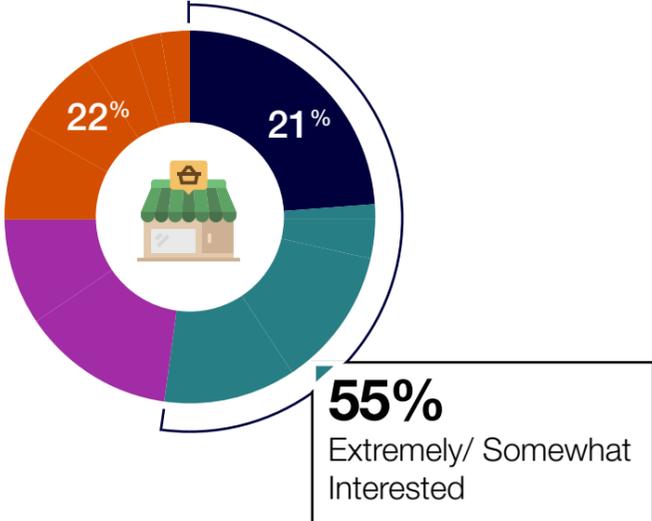
Academic Organizations



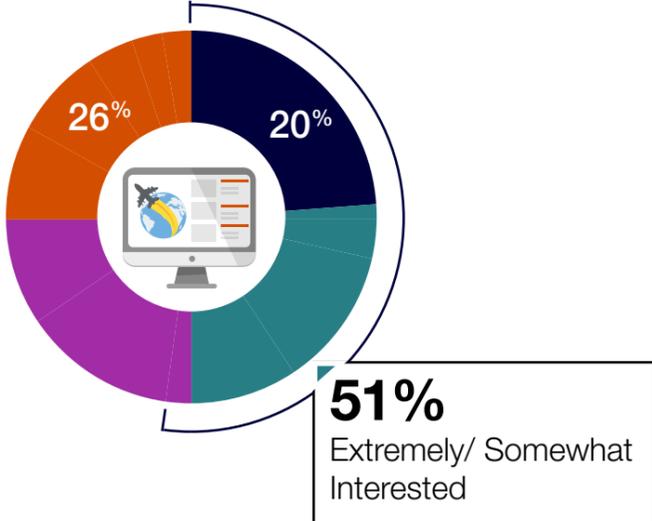
Social Media Sites



Retail Companies



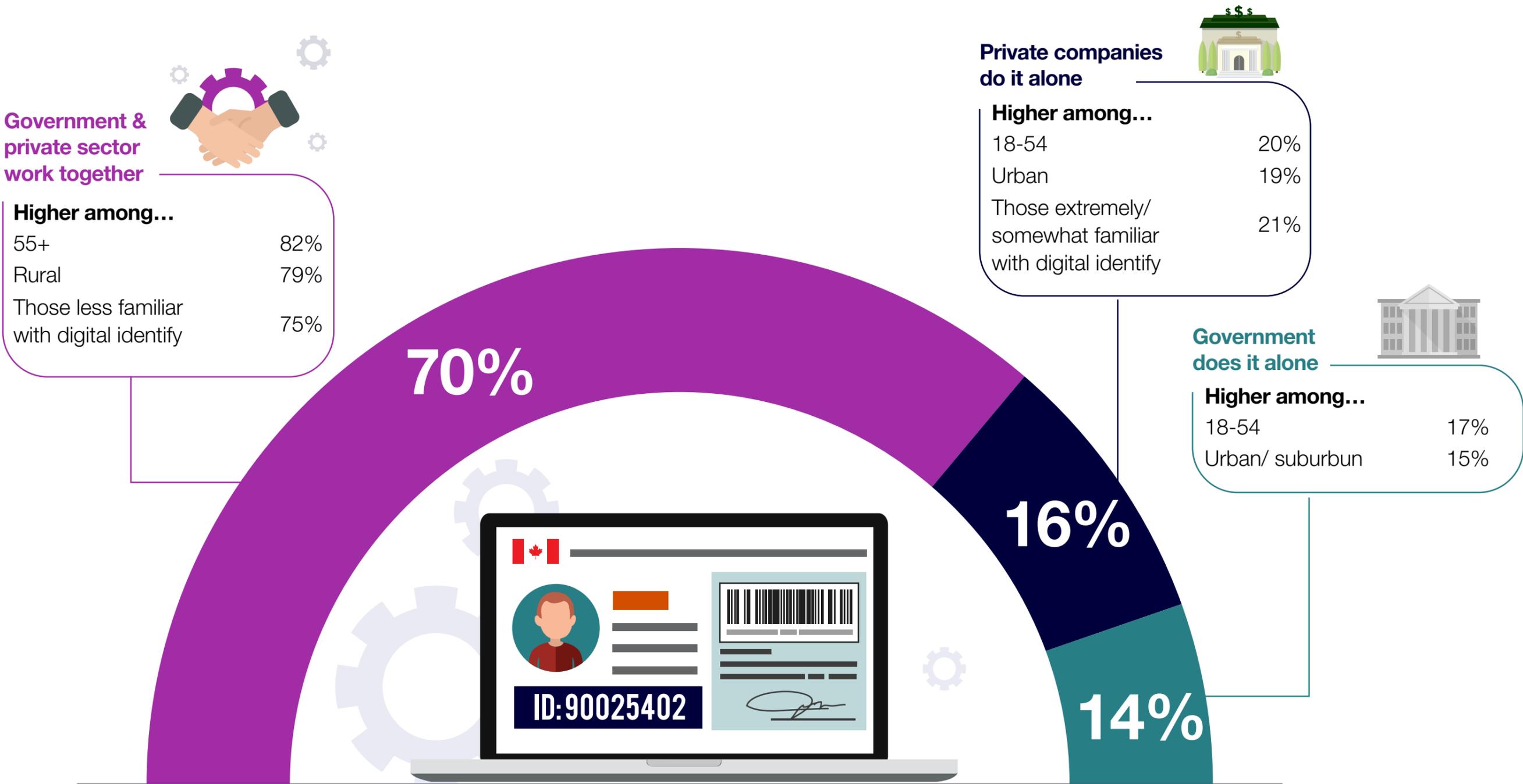
Travel Sites



Q16) How interested are you in verifying your online identity through digital ID authentication with each of the following types of organizations?

7-in-10 feel that a collaboration between government and the private sector is the best approach to create a pan-Canadian digital ID framework.

Which approach do you think is best for creating a pan-Canadian digital ID framework?

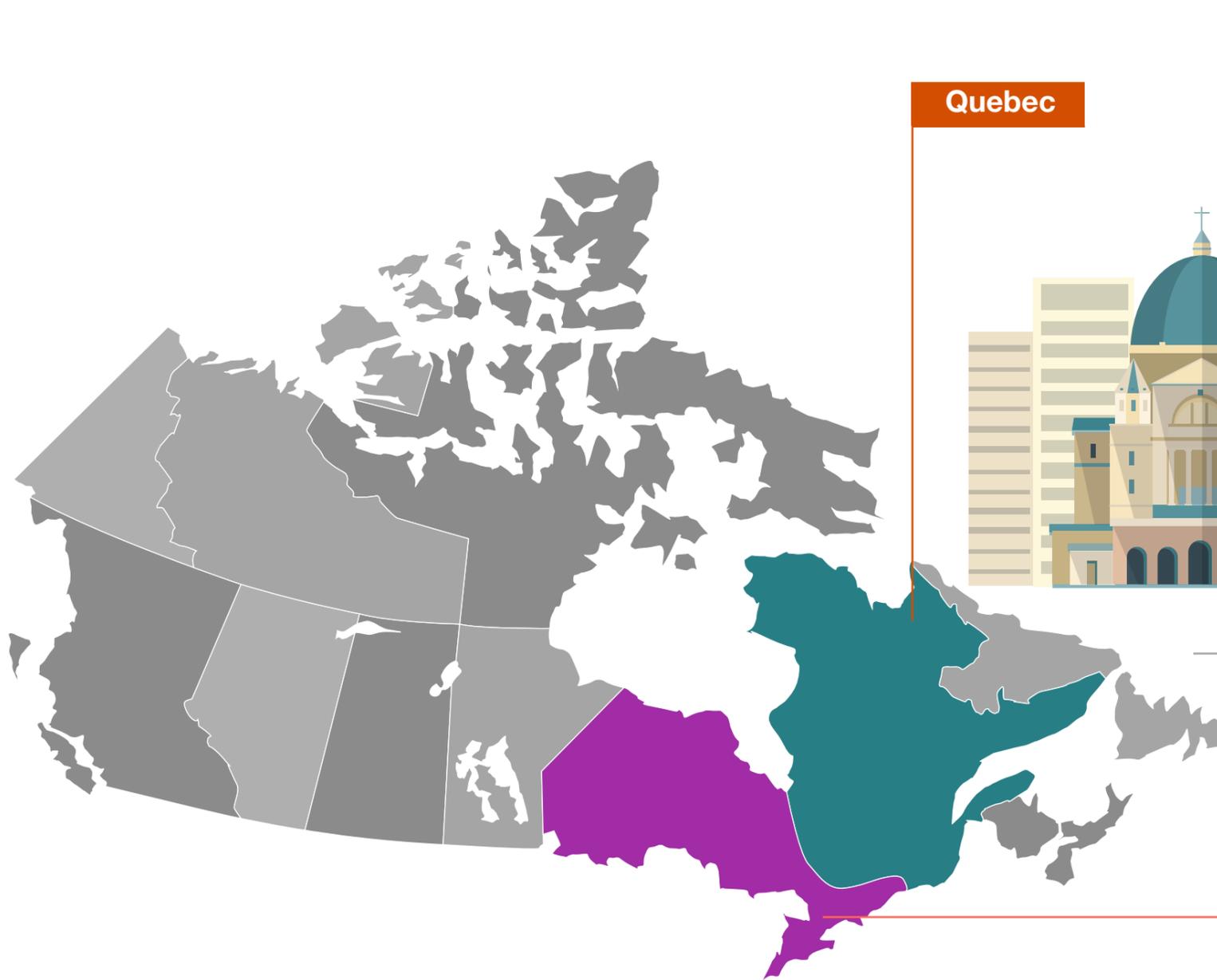


Q17) Currently, there is no organization or government body responsible for creating a safe and secure digital ID framework for all Canadians. Below are three potential approaches to creating a pan-Canadian digital ID framework, which one do you think is the best approach?
 Private companies do it alone – I would have different credentials for each organization I do business with (i.e. financial institutions) and I would use those credentials to authenticate myself with government
 Government does it alone – the government would control my identity credentials and determine what credentials can be used where
 Government and private sector work together – by partnering they create a framework that enables citizens to interact efficiently across both government and businesses



Appendix

Key Findings For Regions*



Quebec



Compared to other regions Quebec is **the least concerned** when it comes their personal information being compromised online,

69% are concerned

They have also taken the least action to address their concerns.

On the other hand Quebec reports **the least level** of trust in almost all institutions (except for the government) in comparison to other regions, for keeping their

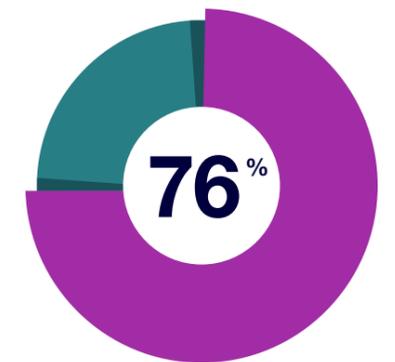
personal information safe and secure



Ontario



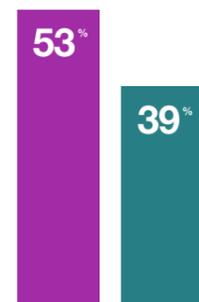
After hearing about its benefits, Ontario region has expressed



the highest level of interest in **"digital identity"**

When it comes to "Digital identity", Ontario has **the highest familiarity**

53% high familiarity with the concept



whereas Quebec and ManSask have **the lowest levels of familiarity**

39% low familiarity with the concept

*Caution: As it is not possible to compare an individual region with each of the remaining 5 regions and also observe a statistically significant difference, the above findings are based on relative differences rather than statistically significant difference to get a directional understanding

Quebec and Atlantic regions have reported a lower hourly usage as compared to the other regions however it may be because of the higher mean age in those regions

