

Integrated Findings: Final Report

PART OF
THE DUAL DIGITAL DIVIDE IV
STUDY



EKOS



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Winter 2004

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For further information about this study, please contact:

Malcolm Saravanamuttoo
Vice President, Technology
EKOS Research Associates
t: 613 235 7215
f: 613 235 8498
e: msaravan@ekos.com

Andrew Reddick
Consultant
t: 506 453 1899
e: areddick@nbnet.nb.ca

James White
Senior Research Analyst
EKOS Research Associates
t: 204 889 3823
f: 204 889 3823
e: jwhite@ekos.com

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Executive Summary



About the Study

The fourth edition of the *Dual Digital Divide* series of reports builds on the findings from the first three studies utilizing, for the first time, an integrated quantitative and qualitative approach to exploring key trends.

The report has three main objectives:

- Provide tracking data on the status of Internet usage and location of Internet usage/access trends in Canada.
- Provide a better understanding of the reasons why a significant number of Canadians still do not use the Internet, including a detailed analysis of key non-user subgroups.
- Analyse and provide appropriate next steps to enhance those initiatives working to make Canada the most connected nation in the world.

Tier One Digital Divide: Usage

The tier one digital divide is the separation between those who use the Internet and those who do not, without consideration of where they go online. Today, three in four Canadians are Internet users (defined as having used in the past three months). 7 per cent have used the Internet before, but have stopped using or use the Internet infrequently. The remaining 19 per cent have never used the Internet before.

Despite the overall pervasiveness of usage, the digital divide between subgroups persists.

- Just over one in three seniors (35 per cent) have used the Internet in the past three months. By comparison, 93 per cent of those under 25, and 86 per cent of those 25 to 44 years of age, are Internet users.
- 52 per cent of lowest income Canadians (less than \$20K) and 94 per cent of highest income Canadians (\$100K or more) are Internet users — a substantial 42-percentage point divide.
- 60 per cent of Canadian labourers are Internet users, compared to 85 per cent of those employed in management or professional positions.

Reasons for Not Using the Internet

Internet non-users are far from a homogeneous group. To better understand the reasons for remaining offline this year's report further subdivides the "far" and "near user" typologies presented in previous editions into four distinct segments. The four segments of the Internet Non-user Segmentation are as follows:

NEAR USERS

New near users: — 12 per cent of Internet non-users

Non-users who have never used the Internet before, but report they expect to begin using the Internet in the next year.

Rejoining/accelerating near users: — 12 per cent of Internet non-users

Non-users who have used the Internet before and who expect to start using the Internet more regularly in the next year.

FAR USERS

Drop-out/infrequent users: — 16 per cent of Internet non-users

Non-users who have used the Internet before, but do not expect to start using the Internet, or begin using the Internet more regularly, in the next year.

Core non-users: — 60 per cent of Internet non-users

Non-users who have never used the Internet before and who do not expect to start using the Internet in the next year.

The distribution of these segments varies significantly across key subgroups:

- Only 8 per cent of senior non-users are "re-joining/accelerating near users" (4 per cent) or "drop-out/infrequent users" (4 per cent). And while 80 per cent are core-none users, at 12 per cent seniors are no more or less likely than other age groups to be "new near users".
- Similarly, lowest income (less than \$20K) non-users are less likely to be "re-joining/accelerating near users" or "drop-out/infrequent users" (8 per cent and 12 per cent) and are significantly more likely to be "core non-users" (68 per cent). At the same time, lowest income non-users have an average proportion of "new near users" (12 per cent).

There are important differences in the main reasons cited for remaining offline across Internet non-user segments:

- At 30 per cent and 31 per cent “no computer/computer too old” is the main reason “new near users” and “accelerating/rejoining near user” have not used the Internet in the past three months. Cost tends to underlie this reason.
- 36 per cent of “drop-out/infrequent users” indicate a lack of interest or need is the main reason they have not used the Internet in the past three months. 30 per cent, however, cite “no computer/computer too old”.
- Slightly less than one in two “core non-users” (47 per cent) have never used the Internet due to a lack of interest or perceived need. “No computer/computer too old” is the second most pervasive reason for remaining offline at 16 per cent.

Tier Two Digital Divide: Access

As the characteristics of Canada’s evolving information society take shape, considerations of location and type of access have become central to accurately evaluating the accessibility of a substantively similar online experience for all Canadians. The tier two digital divide is concerned with location and type of access. The divide is centred on differences in availability of access from key locations and differences in availability of high-speed home access between subgroups.

The household is, increasingly, the dominant usage location for Canadian Internet users by a substantial margin:

- 84 per cent of Internet users have used the Internet at home in the past three months.
- The workplace is the second most pervasive access location at 37 per cent, trailing home usage by 47-percentage points.
- A narrow 5 per cent of Internet users went online from a public access site in the past three months.

Location of usage varies significantly by non-user subgroup:

- 94 per cent of seniors, who have used the Internet in the past three months, did so from home, with few going online from any other location.
- 77 per cent of lowest income (less than \$20K) users have used the Internet at home, 7 per cent at work and 15 per cent from a public access site. By contrast, 89 per cent of highest income (\$100K or more) Internet users did so at home, 56 per cent at work, 1 per cent using public access sites.
- Labourers are the least likely of employed Internet users to use the Internet at work at 3 per cent. 89 per cent used the Internet at home in the past three months and 16 per cent went online from a public access site.
- 79 per cent of late-adopter Internet users with less than one year of experience online used the Internet at home, 14 per cent at work and 4 per cent at public access sites. This compares to 89 per cent, 49 per cent and 3 per cent of experienced users who have been online for six years or more.

Perceived Importance of Household Internet Access

The perceived importance of household Internet access continues to rise. Overall, 76 per cent of Canadians view household Internet access as “highly important” (36 per cent, 5 to 6 on a 7-point scale) to “essential” (30 per cent, 7 on a 7-point scale), up from 49 per cent in 1998. Perceived importance, however, varies across key subgroups:

- With 43 per cent indicating household access is “highly important” to “essential”, seniors are the least likely age group attribute high importance to household access. However, this number rises to 81 per cent for those seniors who have used the Internet in the past three months.
- Similarly, lowest income Canadians (less than \$20K) are less likely to view household access as “highly important” to “essential” at 49 per cent. This number jumps to 75 per cent for those lowest income Canadians who have used the Internet in the past three months.
- Indicative of the connection between home access and Internet usage, though they are less likely to report recent usage, labourers are significantly more likely to believe household access is “essential” (39 per cent).

The Household High-Speed Dial-up Access Divide

Household access has become increasingly mainstream. Two in three households have Internet access at home (67 per cent), 52 per cent of households having had home access for more than two years. Further, high-speed home access has fast become the dominant way Canadians experience the Internet at home, with those households with high-speed access now outnumbering those without Internet access — 38 per cent have high-speed access, 33 per cent do not have household access at all.

In line with usage trends, not all Canadians are able to take equal advantage of this increasingly important home technology with household Internet access penetration varying significantly across subgroups:

- 42 per cent of lowest income households (less than \$20K) and 89 per cent of highest income households (\$100K or more) have household Internet access — a 47-percentage point divide.
- While close to four in five of those under 25 years of age (79 per cent) have household Internet access, only two in five seniors (40 per cent) have access at home.
- 54 per cent and 57 per cent of semi-skilled and labourers have household Internet access. This compares to 77 per cent and 75 per cent of those employed in professional and management positions.
- The divide between those with access to high-speed and those with dial-up is most pronounced between urban and rural households.
 - 43 per cent of urban households have high-speed household Internet access, 23 per cent have dial-up, 3 per cent “Other/unidentified”.
 - Fewer than half the number of rural households (19 per cent) have high-speed access at home, 38 per cent have dial-up, 3 per cent “Other/unidentified”.

Future Role of Public Access Sites

Given Canada's rapidly changing information society, public access sites must re-evaluate and adjust priorities to continue to make a positive contribution to raising Canadians to the status of the world's most connected.

Quantitative and qualitative results indicate that those least likely to use the Internet at work or at home, by and large, do not view public Internet access as a viable alternative. Further, for many non-users, Internet usage hinges on ownership of a computer capable of accommodating home Internet usage. Public access options hold little appeal for these potential late-adopters. That being said, public access sites continue to be important resources for some low-income and labourers.

Public access sites and community networks are in a key position to close digital divides through skill development, as well as provide government information and services. Current non-users and late-adopters are less likely to be in a position to develop computer and Internet skills at school or the workplace. Public access networks may fill this gap by providing programs that facilitate Internet usage from preferred access locations, specifically the home and workplace. Emphasis must be adjusted to place priority on skills development. Creating linkages between skills programming and usage from primary locations will increase awareness of the changing role of access as a strategic component of a basket of information and service channels and enhance usage by those not yet connected.

Multi-Channel Imperative

The principle of equality reinforces the importance that all citizens have the option to use the Internet. At the same time, however, this same principle reinforces the importance that those who are not able or who do not wish to use the Internet retain the ability to access the same or substantively similar information and services.

The importance of ensuring that those who remain offline are not marginalized is a central driving factor for maintenance of a multi-channel approach to service delivery. Qualitative results support the contention that failure to maintain a multi-channel approach to government information and service delivery will be viewed as an affront to Canadians' sense of inclusion, equality and fairness. .



About the Study

Introduction

EKOS' *Dual Digital Divide* series of studies have shed considerable light on Canadian Internet usage and access trends, highlighting those among us who are most at risk of exclusion from Canada's evolving information society. Now in its fourth edition, this year's report builds on the findings from the first three studies utilizing, for the first time, an integrated quantitative and qualitative approach to exploring key trends.

The quantitative research and tracking analysis indicate the "near user" subgroup identified in earlier studies has, by and large, come online as expected. At the same time, the particular rigidity of "far users" has continued such that there is little likelihood they will go online in the immediate future. The results of the qualitative research in this year's study have provided important insights into understanding the attitudes and practices of non-users, as well as confirmation of the findings of the broad quantitative survey results from the 2003 *Rethinking the Information Highway* study.

A comparison of digital divide trends and core issues between this year's research and the study results from the first report in 2000 is revealing. On the one hand, there have been significant gains made in regards to the overall pervasiveness of Internet usage and reduction of the digital divide in several respects. On the other hand, a significant number still do not use the Internet. More worrisome is that many of these individuals are members of social subgroups that are at greatest risk of marginalization — low income, blue collar employed (those least likely to have access at work), seniors/retirees, and rural Canadians.

Study Objectives

The first objective of this year's study is to provide tracking data on the status of Internet usage and location of usage/access trends. The second objective is to provide a better understanding of the reasons why a significant number of Canadians still do not use the Internet, including a detailed analysis of key non-user subgroups. The third and final objective is to analyse and provide appropriate next steps to enhance those initiatives working to make Canada the most connected nation in the world.

To achieve these objectives the study subdivides digital divide trends into tier one and tier two digital divides. The tier one divide addresses Internet usage, without consideration of access location. This is followed by a detailed analysis breaking down the reasons why some Canadians do not use the Internet. This year's study further divides the "near user" and "far user" typologies introduced in previous *Dual Digital Divide* reports to incorporate considerations of past experience with the Internet.

Tracking trends in location of usage/access, the tier two digital divide identifies those primary access points that play a central role in determining Internet uptake. The tier two digital divide also examines issues of type of access available to households and the emerging divide between those households with high-speed home access and those who must rely on less efficient dial-up home access.

Definitions

There are important, though subtle, differences between considerations of Internet usage and Internet access. All those who have used the Internet in the past three months — Internet users — have Internet access from home, work or elsewhere. Those with Internet access, however, are not necessarily Internet users themselves and may leave usage to other household members.

- For the purposes of this study, **Internet users** are individuals who have used the Internet from home, work or elsewhere in the past three months.
- **Households with Internet access** are defined as those households who currently have access to the Internet at home.

Methodology

This year's study adopts an integrated quantitative and qualitative approach, providing tracking for aggregate trends and further study on key areas of concern.

Quantitative Methodology

Quantitative report findings are based on a customized analysis of the findings from EKOS' *Rethinking the Information Highway* study undertaken in Spring 2003. The research methodology used in the *Rethinking the Information Highway* study involved a panel-based design, with a telephone survey and a follow-up self-administered survey.

The first wave of research — the telephone survey — involved interviews with a random sample of 5,182 Canadians, aged 16 and over. Interviewing on Wave One was undertaken during a four-week period, between April 8th and May 7th, 2003.

The second wave of research involved a self-administered survey that was mailed to approximately three in four of the same individuals from Wave One. The self-administered survey was mailed to respondents in three streams. Several procedures to increase the response rates were followed, including extensive follow-up procedures with a complete re-mailing of the survey as well as a lottery with appropriate prizes to encourage participation. A total of 2,245 surveys were completed and returned to EKOS between May 1st and June 18th, 2003.

Wave One data is statistically weighted by age, gender and region to ensure findings are representative of the Canadian population aged 16 and over. In order that the findings from the second, Wave Two, survey are also representative of the same population, data is weighted by Internet usage, as well as by age, gender and region.

With sample sizes of 5,182 and 2,245, the results may be considered accurate within +/- 1.4 and 2.2 percentage points, 19 times out of 20. The margin of error for regional results and other subgroups will be larger.

Qualitative Methodology

The qualitative findings are drawn from a series of focus groups undertaken during the weeks of December 1st and December 8th, 2003. A total of ten focus groups were conducted in Winnipeg, Ottawa, Montreal and Moncton. Two groups were held in each centre, with the exception of Winnipeg, where four groups were conducted.

Participants were segmented into three distinct groups, new users, near non-users and far non-users, based on their experience using the Internet and their expectations for using the Internet in the coming year:

- **New users** are defined as those individuals who have started using the Internet (or started using it regularly) within the last 12 months.
- **Near non-users** are defined as individuals that have not used the Internet recently (within the past three months) but expect to start using the Internet, or use it more regularly, in the coming year.
- **Far non-users** are defined as individuals that have not used the Internet recently (within the last three months) and do not expect to start using the Internet, or use it more frequently, in the coming year.

All groups were conducted in English with the exception of the Montreal groups that were conducted in French. The groups lasted two hours and all were held in dedicated focus group facilities. Participants were offered a \$50.00 cash incentive for participating in the research. The location, dates and specific composition of the focus groups are summarized in the following table.

LOCATION	DATE	GROUP 1	GROUP 2
Winnipeg	Tuesday, Dec. 2	Non-users ("Far users")	Non-users ("Near users")
Winnipeg	Wednesday, Dec. 3	New users (Online < 1 year)	Non-users ("Near users")
Ottawa	Tuesday, Dec. 9	New users (Online < 1 year)	Non-users ("Near users")
Montreal	Wednesday, Dec. 10	New users (Online < 1 year)	Non-users ("Far users")
Moncton	Thursday, Dec. 11	New users, (Online < 1 year)	Non-users, ("Far users")

Tier One Digital Divide: Usage

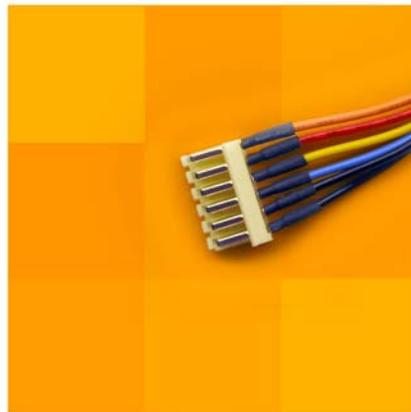
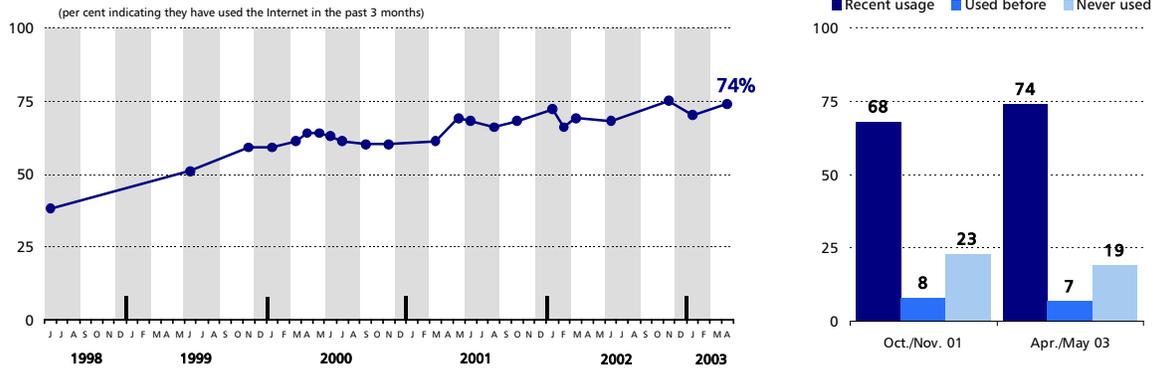


Fig. 1
Recent Internet usage

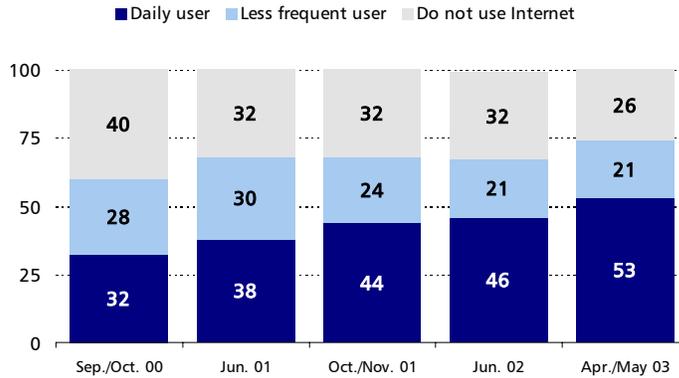
Q: In the past 3 months, have you used the Internet, either at home or elsewhere?
[If not] Have you ever used the Internet before?



BASE: All Canadians; Apr./May 2003, n= 5182

Fig. 2
Frequency of Internet usage

Q: How often do you use the Internet either at home or elsewhere for personal and work related activities in a typical month?



BASE: All Canadians; Apr./May 2003, n= 5182

Internet Usage Trends

The Government of Canada has committed itself to make Canada the most connected nation in the world. This commitment has been made to ensure all Canadians have an opportunity to take advantage of our evolving information society. The tier one digital divide deals with the pervasiveness of Internet usage, independent of location of access, and is based on those factors that differentiate users and non-users.

The Internet has become an integral part of the Canadian cultural experience. Recent tracking data has shown that three in four are Internet users. An additional 7 per cent have had some experience using the Internet before, but have not used it recently. A declining, but significant minority of Canadians have no direct experience using the Internet. Qualitative findings, however, indicate that many without direct experience are able to access the Internet by proxy through the actions and experiences of family and friends [Figure 1].

In addition, frequency of usage by those online continues to intensify, with a majority of Canadians going online daily [Figure 2].

- 74 per cent of Canadians have used the Internet in the past three months, up from 68 per cent in 2001.
- 7 per cent have used the Internet before, but not in the past three months.
- At 19 per cent, less than one in five Canadians has never used the Internet before, falling from 23 per cent in 2001.
- A majority, 53 per cent, of Canadians use the Internet on a daily basis.

There, however, remain significant differences in overall usage trends across various subgroups. As mainstream society uses information technology with increasing intensity, the imperative to identify those being left behind becomes increasingly critical. In particular, seniors/retirees and low income Canadians continue to be at significant risk of being marginalized in regards to Internet usage.

“Tout ce que j’ai de besoin, c’est sur Internet.”

(Montreal, new user)

“My daughter registered for university through the computer this year – it’s faster, it’s easier. It’s very efficient. She really depends on it.”

(Ottawa, near non-user)

“Internet c’est une bonne source d’information pour faire un achat bien informé.”

(Montreal, new user)

“My ex-wife got me into it. When she went away for a couple of weeks, and all of a sudden the bills were here. She left me instructions for how to pay them online and I thought: “Wow! That’s really easy!”

(Moncton, new user)

Table 1 a: Internet Usage and Frequency of Usage

(per cent)

	RECENT INTERNET USAGE			FREQUENCY OF INTERNET USAGE		
	Internet users	Non-users		Daily	Less frequent	Non-users
		Used before	Never used			
REGION						
British Columbia	78	6	16	59	19	22
Alberta	77	6	17	55	22	23
Prairies	72	8	20	50	22	28
Ontario	78	6	16	58	20	22
Quebec	67	11	23	43	23	33
Atlantic Canada	70	6	23	48	22	30
LOCATION						
Urban	76	7	17	56	21	24
Rural	65	9	26	43	22	35

BASE: All Canadians; Apr./May 2003; n=5182

Variance by Region

Regional differences continue to persist [Table 1a].

- Quebec and Atlantic Canada residents are more likely to have never used the Internet (non-users/never used, 23 per cent for both). This compares to only 16 per cent of British Columbians and Ontarians, and 17 per cent of Albertans.
- At 11 per cent, Quebecers are significantly more likely to have used the Internet before, but not in the past three months.
- The highest incidence of daily usage is in Alberta (55 per cent), Ontario (58 per cent) and British Columbia (59 per cent). By contrast, less than one in two Quebecers (43 per cent) and Atlantic Canadians (48 per cent) are daily users.

Variance by Rural/Urban Location

Compared to regional differences, the gap between rural and urban Canadians is slightly more pronounced [Table 1a].

- Rural Canadians continue to be more likely to have no previous online experience; 26 per cent compared to 17 per cent of urban Canadians.
- 56 per cent of urban Canadians are daily Internet users compared to only 43 per cent of rural Canadians.

Table 1 b: Internet Usage and Frequency of Usage

(per cent)

	RECENT INTERNET USAGE			FREQUENCY OF INTERNET USAGE		
	Internet users	Non-users Used before	Never used	Daily	Less frequent	Non-users
GENDER						
Male	76	7	17	57	20	24
Female	72	8	20	49	22	28
AGE						
<25	93	6	1	68	25	7
25-44	86	8	6	63	23	14
45-64	70	8	22	48	22	30
65+	35	5	60	22	13	65

BASE: All Canadians; Apr./May 2003; n=5182

Variance by Gender

Men continue to be more likely to use the Internet and use it more frequently. This divide, however, is slight in relation to the division present in other subgroups [Table 1b].

- 76 per cent of men are Internet users, compared to 72 per cent of women.
- 57 per cent of men and 49 per cent of women are daily Internet users.

Variance by Age Group

There is a significant generational aspect to Canadian Internet usage. For younger Canadians, the Internet is something they, and virtually all of their peers, use daily. Inversely, the Internet remains foreign for a large number of seniors [Table 1b].

This aspect of the digital divide may decline as those who began using the Internet before reaching retirement bring the technology into the peer environment of those 65 years and over. However, this effect will be slow. Speeding this process and addressing the differences across generations may be an important part of increasing cross-generational inclusion, communication and the sharing of our common history.

- 93 per cent of those under 25 and 86 per cent of those 25 to 44 years of age are Internet users; an additional 6 per cent and 8 per cent have used it before.
- 70 per cent of Canadians 45 to 64 years of age have used it in the past three months. However, more than one in five (22 per cent) have never used the Internet before.
- A narrow 35 per cent of seniors have used the Internet in the past three months; 60 per cent have never used the Internet.

“I have no reason to have a computer. I never needed one all my life. Why start now? I’ve been retired 12 years. My Canada Pension won’t come off the computer!”

(Moncton, far non-user)

“My son helped me send emails to friends in another province.”

(Moncton, far non-user)

“We bought the computer because my daughter needed it for her homework. That’s when I started using the Internet.”

(Moncton, far non-user)

Table 1 c: Internet Usage and Frequency of Usage

(per cent)

	RECENT INTERNET USAGE			FREQUENCY OF INTERNET USAGE		
	Internet users	Non-users Used before	Never used	Daily	Less frequent	Non-users
HOUSEHOLD INCOME						
<\$20K	52	9	39	32	19	48
\$20-39K	63	10	27	40	22	38
\$40-59K	77	9	15	53	24	23
\$60-79K	88	5	7	67	22	12
\$80-99K	91	4	4	70	21	9
\$100K+	94	3	3	77	17	6
HOUSEHOLD TYPE						
Couple with children	84	7	9	60	24	16
Unrelated adults	83	5	12	60	22	18
One adult with children	80	9	11	53	27	20
Couple without children	69	6	25	50	19	31
Single adult	56	9	35	38	18	44

BASE: All Canadians; Apr./May 2003; n=5182

Variance by Household Income

A majority of Canadians from all identified income groups report they have used the Internet in the past three months. While this result is indicative of the broad based societal interest in Internet usage, a substantial usage divide between Canada's highest and lowest income groups persists [Table 1c].

- 52 per cent of lowest income Canadians (less than \$20K), compared to 94 per cent of highest income Canadians (\$100K or more), are Internet users — a 42-percentage point usage divide.
- 39 per cent of lowest income Canadians have no direct experience using the Internet; a negligible 3 per cent of highest income Canadians reports the same.
- 77 per cent of highest income Canadians use the Internet daily.
- Less than half that number, 32 per cent, of lowest income households report a similar frequency of usage.

Variance by Household Type

Canadian parents widely recognize the need for their children to be able to use computers and the Internet. Quantitative and qualitative research indicates that Canadians with children are more likely to use the Internet with parents developing their own skills to better facilitate and guide their children's usage [Table 1c].

- 84 per cent of couples with children have used the Internet in the past three months.
- By contrast, 56 per cent of adults living alone have used the Internet in past three months.

"I know that with the Internet, if I don't pass it on to my kids they will be left behind. There is no doubt about it. I have to provide it for their education and update my skills so that I can guide them."

(Winnipeg, near user)

"For me, [home Internet access] is less worthwhile because it is not a necessity yet. It will be when my daughter is in school."

(Ottawa, near non-user)

Table 1 d: Internet Usage and Frequency of Usage

(per cent)

	RECENT INTERNET USAGE			FREQUENCY OF INTERNET USAGE		
	Internet users	Non-users Used before	Never used	Daily	Less frequent	Non-users
EMPLOYMENT STATUS						
Student	95	3	1	74	21	5
Full-time	86	7	7	63	23	14
Self-employed	81	7	12	60	20	19
Part-time	80	5	13	54	26	20
Unemployed	70	12	18	49	21	30
Homemaker	66	12	22	40	26	34
Retired	41	8	51	26	14	60
EMPLOYMENT TYPE						
Management or administrative	85	3	12	65	20	15
Professional	85	5	10	64	21	15
Sales, services, clerical	73	8	19	51	22	27
Skilled tradesperson	66	10	24	42	24	34
Semi-skilled	62	12	25	40	22	38
Labourer	60	13	26	37	23	40

BASE: All Canadians; Apr./May 2003; n=5182

Variance by Employment Status

The greatest differentiation by employment status exists between those within and those outside of the labour force. Those employed full-time, part-time and the self-employed are more likely to be Internet users. Unemployed Canadians report an average incidence of usage. Internet usage rates fall below average for homemakers and retirees, whereas students are the most likely group to be Internet users [Table 1d].

- 86 per cent of full-time, 81 per cent of self-employed and 80 per cent of part-time employed Canadians are Internet users.
- 70 per cent of unemployed Canadians are Internet users.
- 66 per cent of homemakers and 41 per cent of retirees are Internet users.
- 95 per cent of students are Internet users, 74 per cent of whom use the Internet daily.

Variance by Employment Type

There are notable differences in Internet usage by employment type, indicating a relationship between type of work and usage. That being said, at least six in ten of all employed Canadians are Internet users regardless of employment type [Table 1d].

- At 85 per cent, those employed in management and professional positions are more likely to be Internet users; just under two in three use the Internet daily.
- 73 per cent of sales/service/clerical employees are Internet users.
- 66 per cent of skilled tradespersons, 62 per cent of semi-skilled and 60 per cent of labourers are Internet users, each being significantly below the overall average.

"I never used it until I really had to at work. Now I don't know what I would do without it."

(Winnipeg, new user)

"Internet ne serait pas vraiment utile dans mon métier, mais mes supérieurs l'ont."

(Montreal, new user)

"Internet access at my work is restricted to certain people, it is not part of my job, I'm not supposed to use it."

(Winnipeg, far non-user)

"The only place there's Internet access at my work is in the boss' office."

(Moncton, far non-user)

Reasons for Not Using the Internet

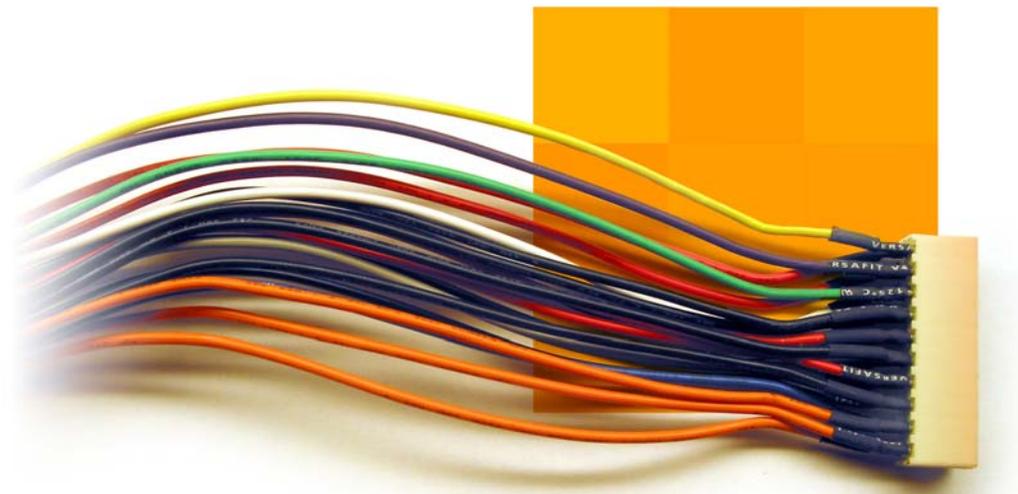
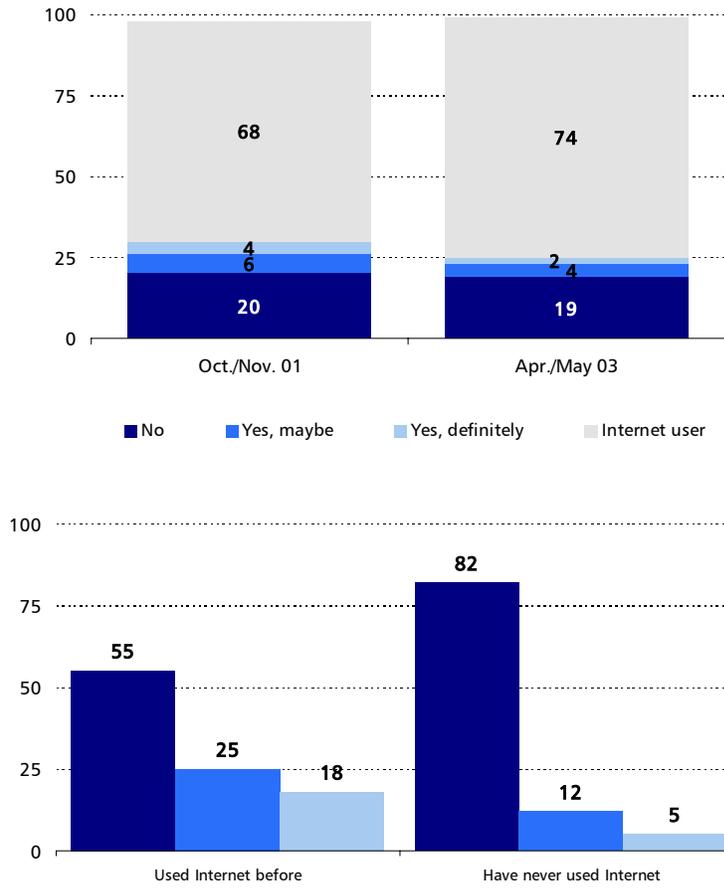


Fig. 3
Expectations re. Internet usage

Q: Do you expect to start using the Internet or using it more regularly in the next year?



BASE: All Canadians ; Apr./May 2003, n=5182, Internet non-users; n= 1383

A constant **one in five non-users do not expect to start using the Internet** in the next year.

A Matter of Choice or Obstruction

There are several reasons why non-users do not use the Internet and, in many cases, indicate no expectation to begin using in the near future. For some, with the means and opportunity to use, remaining offline is a matter of choice. These non-users simply prefer traditional resources to the electronic equivalent. For others, however, remaining offline is not a matter of choice but the result of significant barriers.

To decode who remains offline as a result of choice and who is offline due to obstruction it is important to first recognize that non-users are far from homogeneous. Views of non-users vary in many respects in relation to their previous experience with the Internet and reported expectations to begin using or to use the Internet more regularly in the future.

Expectations Regarding Internet Usage

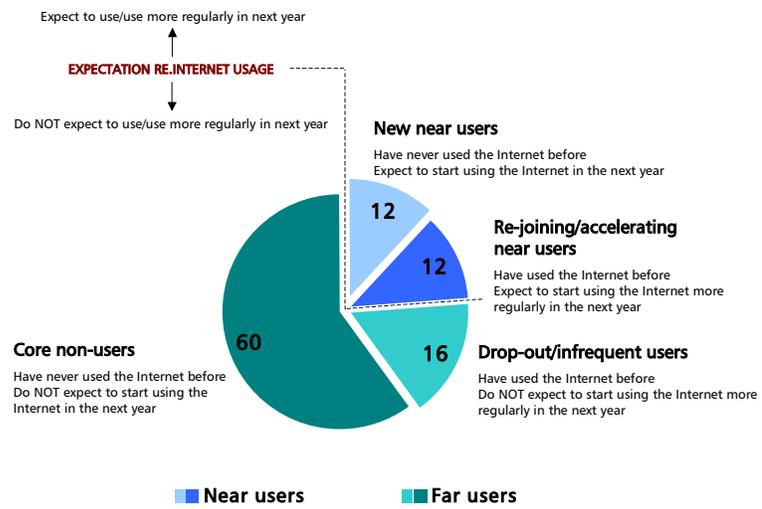
A consistent one in five Canadians report they do not expect to start using the Internet in the next year [Figure 3].

- 2 per cent of Canadians report they “definitely” expect to start using the Internet in the next year, down 2-percentage points from 2001.
- 4 per cent report they may begin using the Internet in the next year, also down 2-percentage points from late 2001.
- One in five Canadians (19 per cent) report they do not expect to start using the Internet, a segment that is virtually unchanged in size from 2001.

Expectation to use the Internet is closely related to previous online experience.

- 43 per cent of non-users with previous online experience expect to start using the Internet (18 per cent “definitely”, 25 per cent “maybe”).
- By contrast, 17 per cent of non-users who have never used the Internet expect to start using (5 per cent “definitely”, 12 per cent “maybe”).

Fig. 4
Internet non-user segmentation



BASE: Canadians indicating they have not used the Internet in the past three months (Internet non-users); Apr./May 2003, n= 1360

Internet Non-User Segmentation

Reflecting differences in expectations, EKOS' Dual Digital Divide series of reports has divided non-users into "near users" and "far users" typologies. While it is only a matter of time before "near users" move online, "far users" do not expect to move online.

This year's study further subdivides non-users into two "near user" segments and two "far user" segments, based on a combination of past experience with the Internet and reported expectation to start using the Internet in the next year. The two "near user" and two "far user" segments are defined as follows, and shown in Figure 4.

Near Users (A total of 24 per cent of non-users)

New near users (12 per cent)

Non-users who have never used the Internet before, but report they expect to begin using the Internet in the next year.

Re-joining/accelerating potential near users (12 per cent)

Non-users who have used the Internet before and who expect to start using the Internet more regularly in the next year.

Far Users (A total of 76 per cent of non-users)

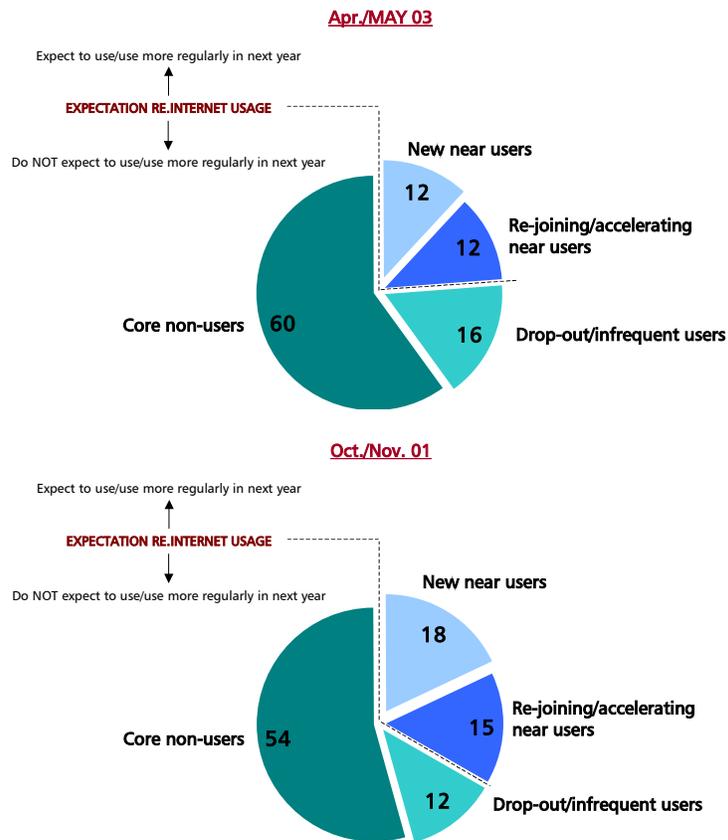
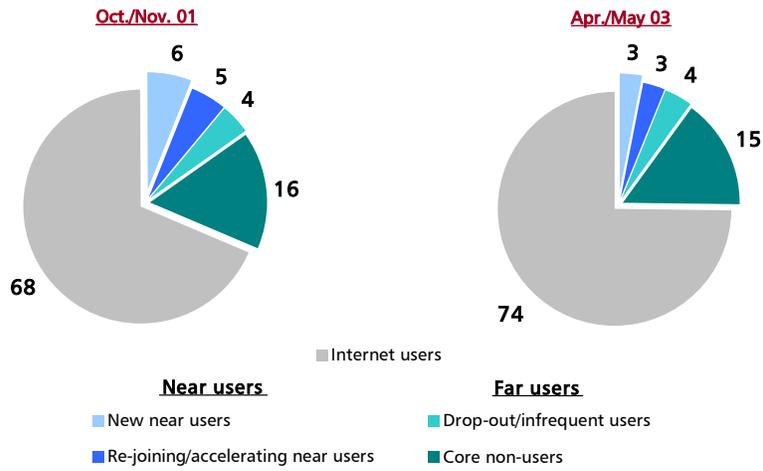
Drop-out/infrequent users (16 per cent)

Non-users who have used the Internet before, but **do not** expect to start using the Internet, or begin using the Internet more regularly, in the next year.

Core non-users (60 per cent)

Non-users who have never used the Internet before and who **do not** expect to start using the Internet in the next year.

Fig. 5
Shifting Internet non-user segmentation over time



BASE: All Canadians; Apr./May 2003, n= 1360, Internet non-users; n= 1360

Results indicate **Internet usage** may be **approaching saturation** in the short term.

Internet Non-user Segmentation Shifts Over Time

Looking at the non-user segmentation over time and within the context of all Canadians highlights an important trend. As overall usage increased from late 2001 to 2003, this growth was entirely drawn from “near users” with the proportion of “far users” remaining virtually unchanged [Figure 5].

These results indicate that Internet usage may be approaching saturation in the short term. That being said, changes in government approach to improving access, availability of new technologies, such as the re-introduction of web television, as well as generational shifts may lead to moderate growth in usage over the intermediate term.

- Only 6 per cent of Canadians are “near users” (3 per cent “new near users”, 3 per cent “re-joining/accelerating near users”), down 5-percentage points from late 2001 when they accounted for 11 per cent of Canadians.
- On the other hand, the one in five Canadians (19 per cent) who make up the “far user” segment has remained virtually unchanged in size from 2001 (4 per cent “drop-out/infrequent users”, 15 per cent “core non-users”).

Narrowing the focus to include only non-users, the proportion of “near users” has declined with “far users” comprising a growing majority of those Canadians who report they did not use the Internet in the past three months.

- 24 per cent of non-users are in the “near user” segment (12 per cent “new near users”, 12 per cent “re-joining/accelerating near users”), down from 33 per cent in 2001.
- By contrast, 76 per cent of non-users are “far users” (16 per cent “drop-out/infrequent users”, 60 per cent “core non-users”), up 8-percentage points from 2001.

Table 2 a: Internet non-user segmentation

(per cent)

	NEAR USERS		FAR USERS	
	New near users	Re-joining/ accelerating users	Drop-out/ infrequent users	Core non-users
REGION				
British Columbia	19	17	12	52
Alberta	11	16	11	62
Prairies	8	13	15	64
Ontario	14	11	15	59
Quebec	9	11	20	59
Atlantic Canada	12	9	12	67
LOCATION				
Urban	16	13	13	58
Rural	16	9	11	64

BASE: Non-users Apr./May 2003, n= 1360

Variance by Region and Rural/Urban Location

There are notable differences in the regional composition of non-users across the country and between rural and urban areas. These differences, however, are less pronounced compared to other subgroups [Table 2a].

- At 19 per cent and 17 per cent, B.C. has the largest composition of “new near users” and “re-joining/accelerating near users”.
- Fewer than one in ten non-users from the Prairie Provinces (8 per cent) and Quebec (9 per cent) are “new near users”. This low proportion is a significant impediment to continued usage growth in these regions.
- One in five Quebec non-users (20 per cent) are “drop-out/infrequent users”, the largest concentration of this segment by region.
- Two in three Atlantic Canadian non-users are “core non-users” (67 per cent), indicating that Atlantic Canada may remain one of the least connected regions in Canada for the foreseeable future.
- 64 per cent of rural non-users are “core non-users”, with only 9 per cent falling into “re-joining/accelerating near user” typology.
- By contrast, 13 per cent of urban non-users are “re-joining/accelerating near users”, with fewer than three in five (58 per cent) being “core non-users”.

Table 2 b: Internet non-user segmentation

(per cent)

	NEAR USERS		FAR USERS	
	New near users	Re-joining/ accelerating users	Drop-out/ infrequent users	Core non-users
AGE				
<25	2	38	46	14
25-44	14	25	32	29
45-64	14	10	15	61
65+	12	4	4	80
GENDER				
Male	12	13	16	59
Female	13	11	15	60

BASE: Non-users Apr./May 2003, n= 1360

Variance by Age

The generational aspect of Internet usage and the similarly sharp differences in the profile of non-users by age group are closely related. The pervasiveness of Internet usage for younger generations has meant that the few members of these younger age groups have at least some experience online and are less likely to be “core non-users”. Inversely the low level of overall usage among senior peer groups have left most with no direct experience using the Internet, relegating most to the “core non-user” category [Table 2b].

- With the pervasiveness of Internet usage for younger Canadians, those few non-users belonging to this generation are largely “rejoining/accelerating near user” (38 per cent) or “drop-out/infrequent users” (46 per cent).
- A narrow 14 per cent of non-users less than 25 years of age and 29 per cent of those 25 to 44 years of age are “core non-users”.
- A majority of non-users seniors have no direct experience using the Internet, with less than one in 20 being either a “rejoining/accelerating near user” (4 per cent) or a “drop-out/infrequent users” (4 per cent).
- Though 80 per cent of non-user seniors are “core non-users”, this group is no more or less likely, relative to the overall average, to be “new near users” (12 per cent).

Variance by Gender

While there are some slight differences in overall Internet usage trends between men and women, there are no statistically significant differences in the non-user profile between the sexes [Table 2b].

Table 2 c: Internet non-user segmentation

(per cent)

	NEAR USERS		FAR USERS	
	New near users	Re-joining/ accelerating users	Drop-out/ infrequent users	Core non-users
HOUSEHOLD INCOME				
< \$20K	12	8	12	68
\$20-39K	12	10	17	60
\$40-59K	12	16	20	52
\$60-79K	17	18	26	40
\$80-99K	25	25	24	26
\$100K	13	25	28	44
HOUSEHOLD TYPE				
Couple with Children	15	19	23	43
Unrelated adults	23	10	21	46
One adult with children	17	25	21	37
Couple without Children	11	7	12	70
Single adult	11	9	12	68

BASE: Non-users Apr./May 2003, n= 1360

Variance by Household Income

Non-user profile varies significantly by household income. In particular, lowest income households are most likely to fall into the “core non-users” segment with few having any first hand experience using the Internet [Table 2c].

- With 68 per cent of non-users residing in lowest income households (less than \$20K) being “core non-users” these non-users are significantly more likely to fall into this most distant “far user” segment.
- That being said, at 12 per cent, lowest income non-users have a proportion of “new near users” equal to the overall average.

Variance by Household Type

The importance of Internet usage for households with children continues to be apparent with relatively few of these non-user households falling into the “core non-user” segment [Table 2c].

- At 19 per cent and 25 per cent, couples with children and single adults with children are significantly more likely to be “re-joining/accelerating users”.
- Households with children are also significantly less likely to be “core non-users”; a minority 43 per cent and 37 per cent of couples with children and single adults with children fall into this segment.

Table 2 d: Internet non-user segmentation

(per cent)

	NEAR USERS		FAR USERS	
	New near users	Re-joining/ accelerating users	Drop-out/ infrequent users	Core non-users
EMPLOYMENT STATUS				
Student	13	49	24	15
Full-time	13	19	29	39
Self-employed	20	15	20	44
Part-time	12	18	20	50
Unemployed	10	21	20	49
Homemaker	8	13	23	57
Retired	11	6	6	77
EMPLOYMENT TYPE				
Management or administrative	15	9	12	64
Professional	18	15	18	50
Sales, services, clerical	14	13	16	57
Skilled tradesperson	9	13	17	62
Semi-skilled	15	13	20	52
Labourer	12	14	18	55

BASE: Non-users Apr./May 2003, n= 1360

Variance by Employment Status

Similar to usage patterns, the most prominent variations in non-user profile are between those within and those outside of the labour force [Table 2d].

- Full-time, self and part-time employed non-users are significantly less likely to be “core non-users”, 39 per cent, 44 per cent and 50 per cent respectively.
- At 49 per cent, unemployed non-users are also significantly less likely to be core non-users.
- By contrast, 77 per cent, slightly less than four in five, retired non-users are “core non-users”.

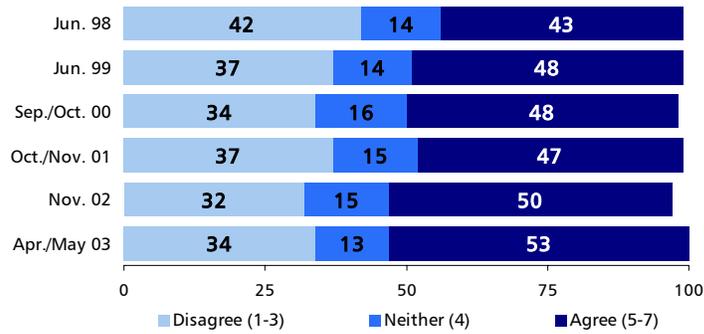
Variance by Employment Type

There is very little variation in the non-user segmentation by employment type [Table 2d].

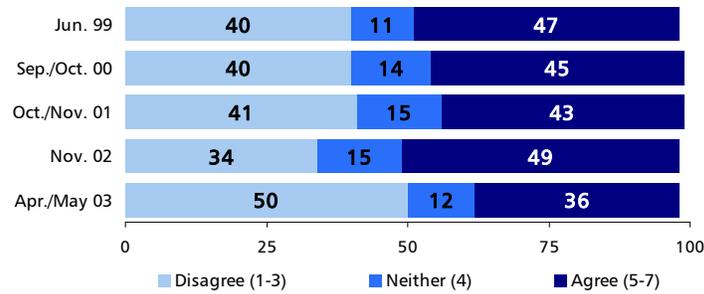
- At 18 per cent, non-users employed as professionals are more likely to be “new near users”.
- Non-users professionals are also less likely to be “core non-users” at 50 per cent.

Fig. 6
Broad interest and perceived necessity of usage

Q: Personally, I have no interest in using the Internet.



Q: At some point, I am sure that I will have to start using the Internet.



BASE: Internet non-users; Apr./May 2003, n= 1,381

With an increasing proportion of “far users”, **broad attitudes** are **shifting towards** viewing the Internet and Internet usage in a **negative** light.

Broad Interest and Perceived Necessity of Usage

Against a backdrop of an increasing proportion of “far users”, it is not surprising that broad attitudes are shifting toward viewing the Internet and Internet usage in a less positive and urgent manner [Figure 6].

- For the first time, a majority of non-users agree they have “no interest in using the Internet” (53 per cent).
- Likewise, one in two non-users (50 per cent) disagree that “at some point they will have to start using the Internet”, the highest level of disagreement since EKOS started tracking this question.

As discussed on the next page, these broad attitudes vary significantly by the different types of non-users.

Table 3: Broad Interest and Perceived Necessity of Usage
(per cent)

	NEAR USERS		FAR USERS	
	New near users	Re-joining/ accelerating users	Drop-out/ infrequent users	Core non-users
PERSONALLY, I HAVE NO INTEREST IN USING THE INTERNET.				
Agree (5-7)	31	24	49	64
Neither (4)	17	16	16	10
Disagree (1-3)	48	58	36	25
AT SOME POINT, I AM SURE THAT I WILL HAVE TO START USING THE INTERNET.				
Agree (5-7)	66	71	47	19
Neither (4)	12	12	15	12
Disagree (1-3)	20	15	38	67

BASE: Internet non-users; Apr./May 2003, n= 1,381

NOTE: May not add up to 100 per cent due to DK/NR

Variance by Internet Non-user Segmentation

Broad attitudes are far less positive and urgent among “far users” compared to “near users”. However, results are not as polarized as might be expected. A significant number of “near users” report little interest in the Internet despite reporting an expectation to use the Internet or use it more regularly in the next year. At the same time, an equally significant number of “far users” report interest in the Internet or report an expectation to begin using the Internet “at some point” [Table 3].

This result is indicative of the complexity of motivations and perceptions that play a role in determining the likelihood of usage. It is this complexity that precipitated a more in-depth quantitative and qualitative examination of barriers to Internet usage.

- 48 per cent of “new near users” disagree they have “no interest in using the Internet”, however, 31 per cent agree.
- 58 per cent of “re-joining/accelerating users” disagree that they have “no interest in using the Internet”. On the other hand, close to one in four (24 per cent) agree.
- 66 per cent of “new near users” agree that at some point they will have to begin using the Internet. However, 20 per cent disagree, not experiencing the same imperative, though they expect to begin using in the next year.
- 64 per cent of “core non-users” agree they have “no interest in using the Internet”. That being the case, a sizeable one in four (25 per cent) of these most distant non-users disagree, reporting interest in the using the Internet. Disagreement rises to 36 per cent for “drop-out/infrequent users”.
- 47 per cent of “drop-out/infrequent users” report that at some point they will have to start using the Internet. One in five “core non-users” (19 per cent) also agree.

Table 4 a: Reason for not using the Internet

(per cent)

	Oct./Nov. 2001	Apr./May 2003
PER CENT WHO ARE INTERNET USERS	68	74
PER CENT OF NON-USERS WHO NEVER USED THE INTERNET	23	19
Lack of interest	6	5
No computer/Computer too old	5	3
Do not need	4	2
Cost/Cannot afford	2	1
No time	1	1
Do not know how to work it	2	1
Too old (personal age)	1	1
Not into computers	--	1
Other	2	3
PER CENT OF NON-USERS WHO USED THE INTERNET BEFORE	8	7
No computer/Computer too old	2	2
Cost/Cannot afford	1	--
Lack of interest	1	1
Do not need	1	1
No time	2	1
Other	1	2
TOTAL	100	100

Q: What is the main reason you have not used the Internet in the past three months?
 BASE: All Canadians; Apr./May 2003; n=2190

5 per cent of Canadians have not used the Internet recently or ever before because they **do not have a computer or their computer is too old.**

Reason For Not Using the Internet: Quantitative Results

Examining reported reasons for not using the Internet within the larger context of all Canadians provides a prospective of the size of various segments based on their reasons for not being online. Given the rise in overall Internet usage, the proportion of Canadians who are non-users (with or without any previous online experience) continues to decline [Table 4a].

- 74 per cent of Canadians are users, up from 68 per cent in 2001.
- 19 per cent of Canadians are non-users without any previous online experience, down from 23 per cent.
- 7 per cent of Canadians are non-users who have some previous online experience, down slightly from 8 per cent.

When probed on their main reason for not using the Internet individual non-users provide a wide spectrum of responses. While lack of need or interest in using the Internet are closely related leading main reasons, a sizeable number indicate that not having a computer or that their computer is too old is the main reason they have not used the Internet in the past three months or ever before.

- In total, 5 per cent of Canadians say that not having a computer or that their computer is too old is the main reason for not having used the Internet recently or ever before (3 per cent non-user/never used, 2 per cent non-user/used before).
- Another 9 per cent point to a lack of need or interest (2 per cent non-user/used before and 7 per cent non-user/never used).

Table 4 b: Reason for not using the Internet

(per cent)

	NEAR USERS	FAR USERS
PER CENT OF NON-USERS WHO NEVER USED THE INTERNET	New near users	Core non-users
Lack of Interest	11	33
No computer/Computer too old	30	16
Do not need	7	14
Cost/Cannot afford	6	5
No time	11	4
Do not know how to work it	14	5
Too old (personal age)	3	9
Not into computers	4	3
Other	15	14

PER CENT OF NON-USERS WHO USED THE INTERNET BEFORE	Re-joining/accelerating users	Drop-out/infrequent users
No computer/Computer too old	31	30
Cost/Cannot afford	11	4
Lack of Interest	5	16
Do not need	14	20
No time	17	8
Other	22	21

Q: What is the main reason you have not used the Internet in the past three months?
 BASE: All Canadians; Apr./May 2003; n=1360

Variance by Internet Non-User Segmentation

Table 4b examines the same reasons for not using the Internet as shown on the previous page, but narrows the focus to non-users as subdivided by the Internet Non-user Segmentation.

While the reasons for not using the Internet varies significantly by the non-user segmentation, it is noteworthy that “no computer/computer too old” leads the list of reasons provided for “near users” and a lack of interest or perceived need leads the list for “far users”.

- 30 per cent of “new near users” report “no computer/computer too old” as the main reason they have never used the Internet; 18 per cent cite a lack of interest or perceived need.
- Similarly, 31 per cent of “re-joining/accelerating near users” also reports “no computer/computer too old” as the main reason; 19 per cent cite a lack of interest or perceived need.
- By contrast, 36 per cent of “drop-out/infrequent users” cite a lack of interest or perceived need. However, only a slightly fewer, 30 per cent, report “no computer/computer too old” as the main reason.
- “Core non-users” are most likely to report that a lack of interest or perceived need (47 per cent) is their main reason; 16 per cent report “no computer/computer too old”.

Reason for Not Using the Internet: Qualitative Results

Quantitative data indicates most frequently named reasons for not using the Internet include no computer/computer too old and a lack of interest or need. To a lesser extent, non-users also say they are not comfortable with technology or that the Internet is not safe.

During focus groups discussion, the same barriers surfaced as the reasons for not using the Internet. Probing on these issues allowed for a more in-depth understanding of these reasons for remaining offline.

No Computer/Computer Too Old

Generally, many younger participants cited not having a home computer as the main reason they did not use the Internet. And in fact, when asked, many “new users” reported that the reason they recently started using the Internet (or using it more regularly) is because they now have a home computer.

When examining the issue more closely, it became clear that many did not have a personal computer because they could not afford it or could not justify the expense at this time. Despite the fact that the cost of computers is down sharply from even a few years ago, it was generally perceived that buying a computer and subscribing to Internet access is a costly endeavour.

Many non-users indicating lack of a PC as the main reason for not using the Internet reported they expect to buy a computer and start using the Internet, either when they have more disposable income or when their children start school. In fact, a child’s need for the Internet for schoolwork is a strong incentive for buying a computer.

While many of those without a home computer were aware that they could access the Internet in a public location, it was felt that public access could not adequately meet their own or their family’s needs and held little appeal.

“We have an old Mac, we tried to get Internet on it, but it is just too old so we didn’t bother.”

(Winnipeg, far non-user)

“The few times I have used it [the Internet] I have been amazed by it. It is just not something that I can fit into my budget right now.”

(Winnipeg, near non-user)

“I know what is going on the Internet, what is available. I know there are advantages to it if you know how to use it. It is just too expensive to get a computer. They go out of date over night.”

(Winnipeg, far non-user)

“My sister is very “techie”. She thought I was stuck in the dinosaur age so she bought me a computer.”

(Moncton, new user)

“I wanted a Playstation, but my wife said if I want to play games, we might as well be able to do something else with it.”

(Moncton, new user)

“You go into the library and there are always huge line-ups for the computers, it seems like people are getting all clogged up trying to get on the computer for 15 minutes.”

(Winnipeg, far non-user)

“You can really waste a lot of time on the computer. If you can find it in a print copy faster, why would you use the computer?”

(Winnipeg, far non-user)

“I am a traditionalist, I would just rather use the traditional paper or personal resources to get the information I need. This whole computer thing I found rather expensive and unnecessary.”

(Winnipeg, far non-user)

“It scares me a little bit; I’m afraid I’m going to press something and lose everything!”

(Ottawa, near non-user)

“I am not going to waste my time on a learning curve when I could just get the information faster in a book.”

(Winnipeg, far non-user)

“You really need to know how to use a computer to get the information you want, otherwise you could be on it for a long time and get no where. I don’t even know how to turn it on.”

(Winnipeg, far non-user)

No Need

Senior participants, in particular, were the most likely to name a lack of interest or need as the main reason why they did not use the Internet. When further probed on the issue and presented with all the things that are possible online, almost all maintained that everything that they might want to do on the Internet is equally accessible in-person or by telephone. In general, they are satisfied with these methods of contact and see no need to change. Furthermore, many enjoyed the contact of visiting their bank branch or shopping in-person, for example.

When challenged on the issue, it became clear, that for some, the fact of having no need to use the Internet was further compounded by the expense of buying a computer while on a fixed income and the time it would take for them to learn how to use it. The Internet was a foreign technology and held little appeal for this group.

Not Comfortable with Technology

A few non-users in each group said that they are not comfortable with technology. Fears of pressing the wrong key and crashing the computer, not being able to protect their system from viruses or not knowing how to repair it if something went wrong were genuine concerns.

Many in this group reported being interested in learning more about computers and the Internet and having someone show them how to use it. In general, those that reported that they had a family member or a close friend that was proficient with computers were less likely to report they are not comfortable with technology.

Internet Not Safe

With the media coverage of incidences of computer hacking, identity theft and online credit card and bank fraud, it was not surprising that concern the Internet is not safe was named by some as the reason for not using the Internet. In general, these concerns were vague and compounded by lack of technical knowledge or understanding of the ways users can protect themselves online.

Ill Effects of Internet Usage

At least one or two non-users in each group were quite vocal regarding their concerns of the ill effects of Internet usage. They pointed to Internet addiction and the fact the Internet was causing young people to become more sedentary. While not all agreed that this was a reason not to use the Internet, they did agree that it was a drawback, and that it was easy for children, teenagers and adults alike to spend too much time on the Internet.

Non-users that do not use the Internet because of these types of concerns tended to express an interest in public access to the Internet saying that this way they could control their usage, and complete the task at hand.

*"I think the biggest thing is security, privacy, how do you know who has access to you when you are on the Internet."
(Winnipeg, far non-user)*

*"I like the idea of the Internet, I just wish there was no such thing as hackers. They make it too scary for me."
(Winnipeg, near non-users)*

*"I think the reason I haven't explored more is that I am scared about sitting there for hours. TV is bad enough."
(Winnipeg, near user)*

*"I think it has taken away from personal relationships. To me it is so impersonal. It may be the way of the world but it is not for me."
(Winnipeg, near non-user)*

*"I have friends whose children are teenagers and they can't get them off the computer. They're on MSN. They won't get off. They don't do their homework. It's scary."
(Ottawa, near non-user)*

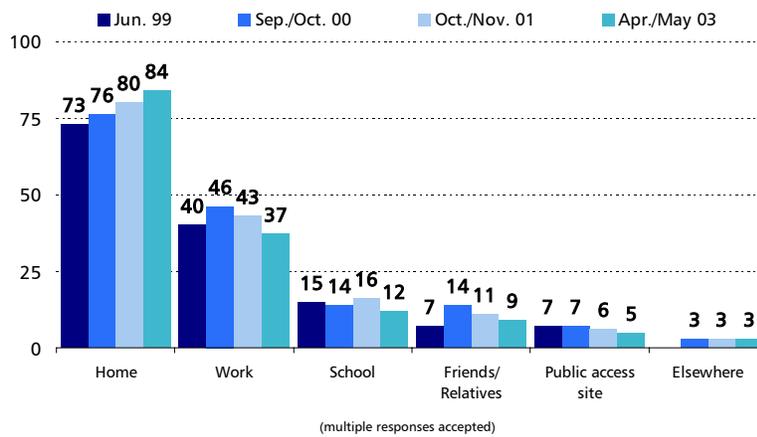
*"Even with the email. It takes a longer time that you planned. It's easy to get distracted."
(Ottawa, near non-user)*

Tier Two Digital Divide: Access



Fig. 7
Location of recent Internet usage

Q: Where did you use the Internet in the past three months?



BASE: Internet users; Apr./May 2003, n= 1581

Location and Type of Access Divide

Evaluations of connectedness have previously been based on the ability to use the Internet, without specific consideration of location and type of usage. However, as the characteristics of Canada's evolving information society take shape, considerations of location and type of access have become central to accurately evaluating the accessibility of a substantively similar online experience for all Canadians.

The tier two digital divide is concerned with location and type of access. The divide is centred on differences in availability of access from key locations and differences in availability of high-speed home access between subgroups.

Location of Usage

The home is the dominant location for Canadian Internet usage by a substantial margin. This trend is expected to intensify as reported home usage continues to rise and proportional usage from all other identified locations declines [Figure 7].

- 84 per cent of Internet users went online from home in the past three months, up from 73 per cent in 1999.
- 37 per cent of Internet users report workplace usage in the past three months, down from the high observed in 2000.
- A declining proportion of users report school or public access site usage; school usage fell to 12 per cent, public access site usage fell to 5 per cent.¹
- 9 per cent of users went online from the residence of a friend or relative.

¹ Respondents were allowed to self-define "public access site". It is possible this may have been interpreted as being more inclusive than government terms of reference for "public access sites".

Table 5 a: Location of recent Internet usage

(per cent, multiple responses accepted)

	Home	Work	School	Friends/ Relatives	Public access site	Elsewhere
REGION						
British Columbia	87	32	9	7	9	2
Alberta	83	40	17	8	2	2
Prairies	83	36	8	5	5	3
Ontario	87	37	13	5	5	2
Quebec	81	38	11	7	3	3
Atlantic Canada	80	38	16	9	4	5
LOCATION						
Urban	85	40	12	6	5	4
Rural	83	29	12	5	4	--

Q: Where did you use the Internet in the past three months?

BASE: Internet users; Apr./May 2003; n=1581

Variance by Region and Rural/Urban Location

While largely mirroring aggregate location of usage trends there are some notable variations in usage patterns by region [Table 5a].

- Highest incidences of home usage are in Ontario and British Columbia, both at 87 per cent of users.
- Reported home usage is lower in Quebec (81 per cent) and in Atlantic Canada (80 per cent).
- Incidence of public access site use is highest British Columbia (9 per cent) and lowest in Alberta (2 per cent).

While similar in most respects, there is significantly lower incidence of workplace usage among rural Internet users than is the case for their urban counterparts [Table 5a].

- 29 per cent of rural users went online at work in the past three months.
- 40 per cent of urban users indicate they have used the Internet at work recently.

Table 5 b: Location of recent Internet usage

(per cent, multiple responses accepted)

	Home	Work	School	Friends/ Relatives	Public access site	Elsewhere
AGE						
<25	86	15	45	10	7	1
25-44	82	49	7	7	5	2
45-64	85	43	2	4	4	4
65+	94	3	1	2	2	5
GENDER						
Male	87	39	13	6	5	4
Female	82	35	12	6	5	2

Q: Where did you use the Internet in the past three months?
 BASE: Internet users; Apr./May 2003; n=1581

Variance by Age

Age is not only a key determinant of overall Internet usage, but is also a significant predictor of usage location. However, while there are significant variations by age, the home remains, by far, the most pervasive access location [Table 5b].

- More than four in five Internet users for all age groups report recent usage from home.
- Reported home usage is highest among seniors. 94 per cent of seniors used the Internet at home in the past three months, with few venturing to other locations.
- Not surprisingly, Internet users under 25 years of age are significantly more likely to have used the Internet from school in the past three months.
- Equally unsurprising, recent workplace usage is highest among Internet users 25 to 64 years of age.

Variance by Gender

While substantively similar in most respects, male Internet users are significantly more likely than female users to report home Internet usage in the past three months [Table 5b].

- 87 per cent of male Internet users report using the Internet from home in the past three months, this number falls to 82 per cent for female users.

Table 5 c: Location of recent Internet usage

(per cent, multiple responses accepted)

	Home	Work	School	Friends/ Relatives	Public access site	Elsewhere
HOUSEHOLD INCOME						
<\$20K	77	7	29	9	15	4
\$20-39K	81	25	7	9	8	1
\$40-59K	85	43	7	8	2	3
\$60-79K	85	44	10	5	3	1
\$80-99K	88	53	8	6	--	4
\$100K+	89	56	10	3	1	3
HOUSEHOLD TYPE						
Couple with children	87	40	13	5	4	2
Unrelated adults	81	29	20	9	8	3
One adult with children	83	39	18	12	7	2
Couple without children	87	33	5	5	2	4
Single adult	73	41	10	10	9	2

Q: Where did you use the Internet in the past three months?
 BASE: Internet users; Apr./May 2003; n=1581

Variance by Household Income

Home usage declines and usage of what respondents considered “public access sites” and school increases as income falls. However, the extent of these shifts, while significant, should not be over stated. It remains more than three in four of all users report recent home Internet usage, regardless of household income level [Table 5c].

- 77 per cent of Internet users from the lowest income households (less than \$20K) report recent Internet usage from home, trailing highest income households by 12-percentage points.
- At only 7 per cent, lowest income Internet users are significantly less likely to report recent workplace Internet usage; 56 per cent of highest income users have used the Internet at work in the past three months.
- 29 per cent of lowest income Internet users have used the Internet from school in the past three months.
- 15 per cent of lowest income Internet users have accessed the Internet from a public access site.

Variance by Household Type

Home usage continues to be dominant, however, location of usage varies significantly by household type [Table 5c].

- Reported recent home usage is highest for couples with children at 87 per cent, and lowest for single adults, at 73 per cent (87 per cent for couples without children is not statistically significant).
- Recent public access site usage peaks at 9 per cent for “single adult” households.

Table 5 d: Location of recent Internet usage

(per cent, multiple responses accepted)

	Home	Work	School	Friends/ Relatives	Public access site	Elsewhere
EMPLOYMENT STATUS						
Student	86	10	64	9	7	--
Full-time	81	64	4	5	3	2
Self-employed	85	33	2	7	3	5
Part-time	88	23	21	9	8	1
Unemployed	87	13	4	9	13	3
Homemaker	89	1	1	11	5	2
Retired	93	1	1	3	2	6
EMPLOYMENT TYPE						
Management or administrative	85	57	4	5	2	3
Professional	85	53	7	4	4	2
Sales, services, clerical	83	29	19	6	5	3
Skilled tradesperson	87	24	5	7	1	2
Semi-skilled	82	19	15	12	8	2
Labourer	89	3	23	8	16	2

Q: Where did you use the Internet in the past three months?

BASE: Internet users; Apr./May 2003; n=1581

Variance by Employment Status

Location of usage varies significantly in several respects by employment status [Table 5d].

- At 93 per cent, those few retirees who use the Internet are the most likely to report recent usage from home and are the least likely to report usage from all other locations; a narrow 2 per cent indicate they used the Internet from a public access site recently. 6 per cent of retirees used the Internet from a location other than those identified (i.e., elsewhere).
- Internet users employed full-time are less likely to report recent usage at home (81 per cent) and are significantly more likely to report recent workplace usage (64 per cent).
- While the most likely to report recent usage at school, students remain more likely to use the Internet at home (86 per cent) than at school (64 per cent) in the past three months.

Variance by Employment Type

There is little variation in home usage by type of employment with more than four in five employed users reporting recent home usage regardless of type of employment. There is significant variation in usage between the remaining peripheral locations [Table 5d].

- There is no statistically significant variation in recent home usage by type of employment.
- Slightly more than one in two Internet users employed in professional and management positions report recent workplace usage (53 per cent and 57 per cent, respectively). By comparison, fewer than one in 20 (3 per cent) of labourers have used the Internet at work in the past three months.
- Labourers have the highest incidence of recent public access site usage at 16 per cent.

Table 5 e: Location of recent Internet usage

(per cent, multiple responses accepted)

	Home	Work	School	Friends/ Relatives	Public access site	Elsewhere
LENGTH OF TIME ONLINE						
<1 year	79	14	9	12	4	1
1-2 years	78	27	8	7	4	4
2-4 years	84	30	11	6	7	2
4-6 years	86	43	15	6	5	2
6+ years	88	49	13	6	3	4

Q: Where did you use the Internet in the past three months?

BASE: Internet users; Apr./May 2003; n=1581

Fewer than **one in 20 late adopters** — less than one year online — have **used** the Internet from a **public access site**.

Location of Usage by Length of Time Online

“New user” focus group participants indicated that while they wanted to begin using the Internet, many of them did not become users until they were able to obtain home Internet access. A very limited number indicated that their late adoption of the technology was a result of obtaining workplace access. Few indicated that access from a public location played a role in their recent adoption of the Internet.

These qualitative findings are supported by quantitative data. A large majority of late adopters, who have begun using the Internet in the past year, have used the Internet at home in the past three months. At the same time, significantly fewer late adopters have used the Internet at work than those with more than four years of experience online. Late adopters are also no more or less likely to have used the Internet from what they would describe as a public access site than those with six or more years of experience using the Internet [Table 5e].

- 79 per cent of late adopters, with less than one year of experience online, have used the Internet from home in the past three months.
- A narrow 14 per cent of these same late adopters have used the Internet at work over the same time period.
- By contrast, over 40 per cent of those with at least four years of experience have used the Internet at work recently.
- 12 per cent of those with less than a year of experience online used the Internet at the residence of a friend or relative.
- Fewer than one in 20 late adopter Internet users (4 per cent) have used the Internet from a public access site.

“I wanted to start using it (the Internet) more, so I just bought a computer for home. I need one at home because it is really hard to use the Internet at school because they are always being used.”

(Winnipeg, new user)

“I was able to buy a computer with payroll deduction program at work. Having a computer at home made me more interested in getting to learn the computer. By having it at home I was able to learn and practice and look at things I was curious about like genealogy.”

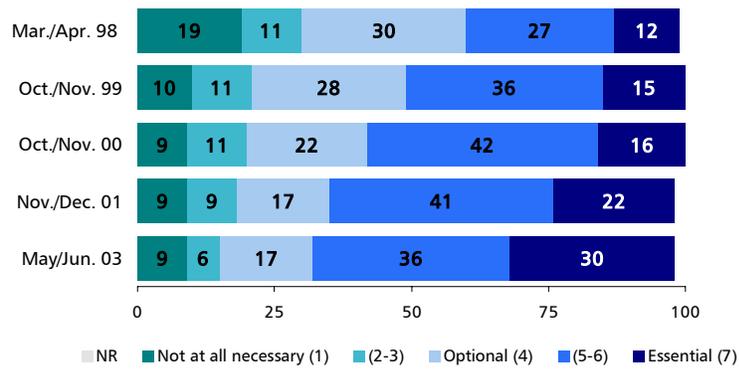
(Winnipeg, new user)

“I never used it until I really had to at work. Now I don’t know what I would do without it.”

(Winnipeg, new user)

Fig. 8
Perceived importance of household Internet access

Q: How important is it to your household to have access to the Internet?



BASE: All Canadians; May/Jun. 2003; n= 2245

Household access to the Internet is viewed as highly important to **essential** by an increasing majority of Canadians.

Perceived Importance of Household Internet Access

The increasing reliance on home Internet usage is well represented in perception of overall importance of household access. Household access to the Internet is viewed as “highly important” to “essential” by an increasing majority of Canadians [Figure 8].

- 66 per cent of Canadians households view the Internet access as “highly important” to “essential”, 5 to 7 on a 7-point scale; up from 49 per cent in 1998.
- Less than one in five (17 per cent) view Internet access as “optional”, 4 on a 7-point scale.
- 15 per cent view household Internet access as “unnecessary” to “not at all necessary”, 1 to 3 on a 7-point scale.

Table 6 a: Perceived importance of household Internet access
(per cent)

	IMPORTANCE OF HOME INTERNET ACCESS				
	Not at all necessary (1)	(2-3)	Optional (4)	(5-6)	
REGION					
British Columbia	8	6	13	38	33
Alberta	11	6	19	35	29
Prairies	9	7	23	38	22
Ontario	7	6	14	36	34
Quebec	10	7	20	38	22
Atlantic Canada	12	7	24	26	30
LOCATION					
Urban	8	6	16	37	32
Rural	11	9	22	36	21

Q: How important is it to your household to have access to the Internet?
BASE: All Canadians; Apr./May 2003; n=5182, * Households with Internet access, n=3426

Variance by Region and Rural/Urban Location

Results vary significantly by region and rural/urban location. Household Internet access is more likely to be perceived as essential in Ontario, and less likely to be viewed as such in the Prairie Provinces (Manitoba and Saskatchewan) and in Quebec.

Further, rural Canadians are less likely to view home access as essential than their urban counterparts. Disproportionate availability of high-speed home access may be a contributing factor for differences in perceived importance of home access by rural/urban location [Table 6a].

- 34 per cent of Ontarians view household access to the Internet as “essential”, 7 on a 7-point scale.
- By contrast, just over one in five (22 per cent) of those from the Prairie Provinces and Quebec report the same.
- 21 per cent of rural Canadians view household access as “essential”, this number climbs to 32 per cent for urban Canadians.

Table 6 b: Perceived importance of household Internet access
(per cent)

	IMPORTANCE OF HOME INTERNET ACCESS				
	Not at all necessary (1)	(2-3)	Optional (4)	(5-6)	Essential (7)
AGE					
<25	1	3	13	31	50
25-44	5	6	16	40	32
45-64	10	8	19	37	25
65+	24	10	19	30	13
GENDER					
Male	8	7	16	37	31
Female	10	6	18	36	28

Q: How important is it to your household to have access to the Internet?
BASE: All Canadians; Apr./May 2003; n=5182

Variance by Age Group

Though gauging perceived household importance, perception of the importance of home access does vary significantly across generational lines. Younger Canadians responding for their household attribute significantly greater importance to household access than seniors. This result is, however, dependant on whether or not the responding senior is an Internet user [Table 6b].

- 81 per cent of Canadians less than 25 years of age report that household access is “highly important” to “essential”, 5 to 7 on a 7-point scale.
- By comparison, a significantly fewer 43 per cent of seniors report the same.
- The number of seniors, who view household access as “highly important” to “essential”, 5 to 7 on a 7-point scale, rises to 81 per cent if they have used the Internet in the past three months.

Variance by Gender

Men and women have comparable views regarding the importance of household Internet access with neither sex differing significantly from the overall average [Table 6b].

- 31 per cent of men and 28 per cent of women report that household Internet access is “essential”, 7 on a 7-point scale.
- An additional 37 per cent and 36 per cent believe that household access to the Internet is “highly important”, 5 to 6 on the same 7-point scale.

Table 6 c: Perceived importance of household Internet access
(per cent)

	IMPORTANCE OF HOME INTERNET ACCESS				
	Not at all necessary (1)	(2-3)	Optional (4)	(5-6)	Essential (7)
HOUSEHOLD INCOME					
<\$20K	16	7	24	26	23
\$20-39K	14	8	22	34	21
\$40-59K	7	9	17	41	26
\$60-79K	5	5	13	42	34
\$80-99K	3	4	9	43	40
\$100K+	1	3	9	37	50
HOUSEHOLD TYPE					
Couple with children	4	6	13	40	36
Unrelated adults	5	6	19	24	41
One adult with children	5	5	22	35	31
Couple without children	11	6	18	38	24
Single adult	17	9	23	32	17

Q: How important is it to your household to have access to the Internet?
BASE: All Canadians; Apr./May 2003; n=5182

Variance by Household Income and Type

Higher income households attribute significantly higher levels of importance to household Internet access than lower income households. However, as observed by age group, importance attributed is closely related to experience using the technology. Lowest income households, who have used the Internet in the past three months, attribute significantly greater importance to household access than their income group on whole [Table 6c].

- 87 per cent of highest income Canadians (\$100K or more) view the Internet as “highly important” to “essential”, 5 to 7 on a 7-point scale.
- 49 per cent of lowest income Canadians (less than \$20K) report the same.
- The number of lowest income Canadians, who view household access as “highly important” to “essential”, 5 to 7 on a 7-point scale, jumps to 75 per cent for those who have used the Internet in the past three months.

Variance by Household Type

As indicated by quantitative and qualitative usage data there is a strong relationship between the presence of children in the household and the perceived importance of household Internet access [Table 6c].

- 36 per cent of couples with children believe that household access is “essential”, 7 on a 7-point scale. An additional 40 per cent indicate household access is “highly important”, 5 to 6 on a 7-point scale.
- High importance attributed by those residing in “unrelated adults” households is likely related to the lower average age of these households.

Table 6 d: Perceived importance of household Internet access
(per cent)

	IMPORTANCE OF HOME INTERNET ACCESS				
	Not at all necessary (1)	(2-3)	Optional (4)	(5-6)	Essential (7)
EMPLOYMENT STATUS					
Student	2	2	11	31	51
Full-time	5	7	15	42	29
Self-employed	5	6	14	32	44
Part-time	4	5	17	38	35
Unemployed	10	5	21	29	33
Homemaker	12	6	21	42	18
Retired	24	8	20	30	15
EMPLOYMENT TYPE					
Management or administrative	5	7	15	40	31
Professional	6	4	15	42	32
Sales, services, clerical	11	7	16	35	30
Skilled tradesperson	10	9	20	37	22
Semi-skilled	8	9	27	31	22
Labourer	13	8	13	25	39

Q: How important is it to your household to have access to the Internet?
BASE: All Canadians; Apr./May 2003; n=5182

Variance by Employment Status

Similar to usage trends, perceived importance varies most significantly between those within and those outside of the labour force [Table 6d].

- Self employed and part-time employed Canadians attribute a higher level of importance to household Internet access with 44 per cent and 35 per cent viewing the home access as “essential”, 7 on a 7 point scale. This result may be related to the lower likelihood that these employment types have used the Internet at work in the past three months relative to full time employees.
- 62 per cent of unemployed Canadians believe household Internet access is “highly important” to “essential”, 5 to 7 on a 7-point scale.
- 82 per cent of students view household Internet access as “highly important” to “essential”, 5 to 7 on a 7-point scale.
- 45 per cent and 60 per cent of retirees and homemakers report household Internet access is “highly important” to “essential”, 5 to 7 on a 7-point scale.
- This number climbs to 78 per cent and 83 per cent if the responding retirees or homemakers have used the Internet in the past three months.

Variance by Employment Type

A majority of all employment types view household Internet access as “highly important” to “essential”. Labourers, who are least likely to use the Internet or report workplace usage, however, are the most likely to view household access to the Internet as “essential”. This result is indicative of the perceived necessity of household access for those who do not have access at work, but want to use of the Internet [Table 6d].

- 39 per cent of labourers view household Internet access as “essential”, 7 on a 7-point scale. An additional one in four (25 per cent) believe it is “highly important”, 5 to 6 on a 7-point scale.

Table 6 e: Perceived importance of household Internet access

(per cent)

	IMPORTANCE OF HOME INTERNET ACCESS				
	Not at all necessary (1)	(2-3)	Optional (4)	(5-6)	Essential (7)
INTERNET USER					
Yes	2	3	13	42	39
No	30	15	28	19	4
LENGTH OF TIME ONLINE					
< 1 year	7	4	24	47	17
1-2 years	1	7	22	46	22
2-4 years	1	4	16	47	31
4-6 years	1	3	11	39	46
6+ years	1	2	7	39	50

Q: How important is it to your household to have access to the Internet?

BASE: All Canadians; Apr./May 2003; n=5182

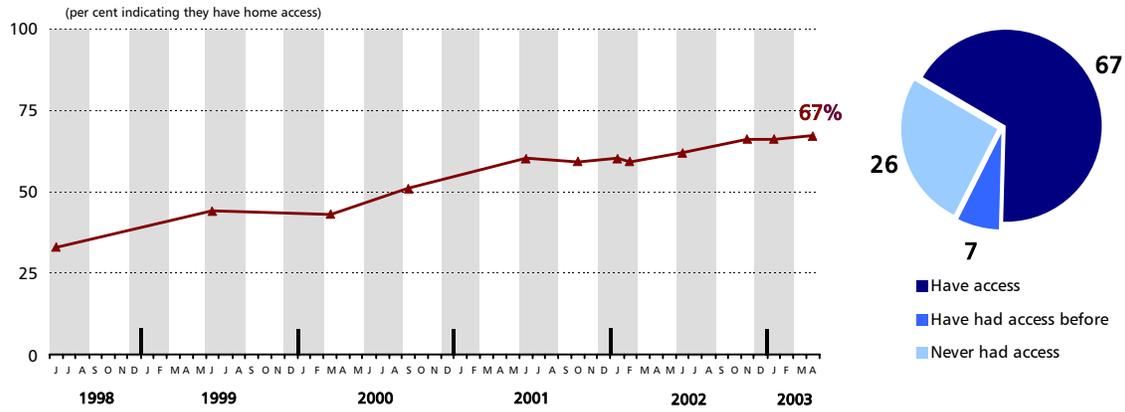
Variance by Usage and Experience Online

As shown above, experience with the Internet has a significant impact on the perceived importance of household access. Table 6e shows how direct this relationship actually is. Non-users, the majority of which have little or no direct experience using the Internet, are significantly less likely to view household access as essential. Perceptions of the importance of household access rise significantly after only a few months of Internet usage and continue to rise as greater experience online is gained [Table 6e].

- Fewer than one in twenty Internet non-users (4 per cent) view household access as “essential”, 7 on a 7-point scale; 19 per cent, however, view it as “highly important”, 5 to 6 on the same scale.
- Perception that household access is “essential” jumps to 17 per cent for those with less than one year of experience using the Internet, with 47 per cent of these late adopters viewing it as “highly important”.
- 50 per cent of Internet users with six years or more experience online, view household access to the Internet as “essential”, 7 on a 7-point scale; an additional 39 per cent view it as “highly important”, 5 to 6 on the same scale.

Fig. 9
Household Internet access

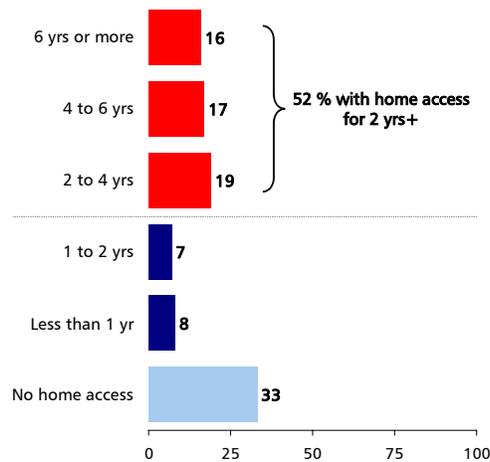
Q: Do you currently have access to the Internet at home?
 [IF NO] Have you ever had access to the Internet from home?



BASE: All Canadians; Apr./May 2003, n= 5182

Fig. 10
Length of time with household Internet access

Q: How long have you had access to the Internet from home?



BASE: All Canadians; Apr./May 2003, n= 5182

The Household High-speed Dial-up Access Divide

The dominant reliance and importance attributed to home Internet access places this location as key component of advancing Canadian connectivity. As such, efforts to support greater inclusion of Canada's most disadvantaged and at risk of marginalization must include a measure of support to facilitate home Internet usage so that these populations are able to access a substantively similar online experience as that enjoyed by a majority of Canadians.

Household Internet Access

Household Internet access has become increasingly mainstream, although the growth rate can be characterized as more incremental today than the explosive growth observed between 1998 and 2001 [Figure 9].

- 67 per cent of households report having home Internet access.
- Households who have had home access at some point, but currently do not account for almost one in ten households (7 per cent).
- 26 per cent of households have never had home Internet access.

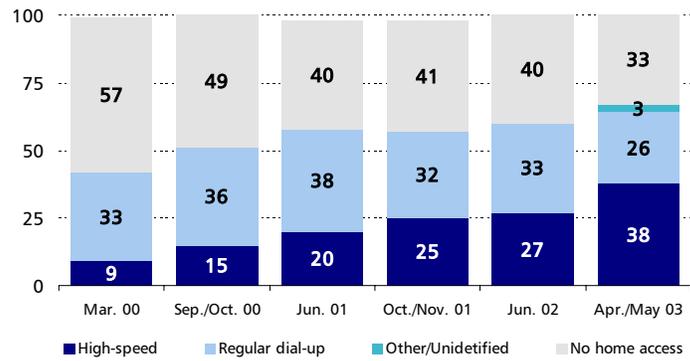
Length of Time with Household Access

The rapid initial uptake of home access has resulted in many Canadians already being experienced home users [Figure 10].

- 52 per cent of households have had home access for at least two years, with 16 per cent having had access at least six years.
- Another 15 per cent are more recent home users, having obtained home access within the past two years.

Fig. 11
Type of household Internet access

Q: What type of Internet access is there in your household?



BASE: All Canadians; Apr./May 2003, n= 5182

Canadians with **high-speed** access now **outnumber**
those without home Internet **access**.

High-Speed Versus Dial-up

The second face of the tier two digital divide is the substantively different level of access enjoyed by those households with high-speed Internet service in relation to those who rely on slower, less efficient dial-up. The quick uptake of high-speed household access options, despite their higher average cost, is clear evidence of the greater value attributed to broadband access.

In a matter of only a few years, high-speed Internet has assumed dominance on the home Internet access landscape, unseating dial-up as the principle way in which Canadians experience the Internet at home. In fact, households with high-speed Internet access now outnumber those without home access for the first time [Figure 11].

- 38 per cent of households report having high-speed access;
- 26 per cent of households report having dial-up access;
- 3 per cent of households were unable to identify their type of access; and
- 33 per cent of households report having no home access.

Similar to Internet usage trends, low income, blue-collar employees (those least likely to have access at work) and seniors/retirees are falling behind, being both less likely to have household access and less likely to have high-speed access at home. The high-speed versus dial-up access divide is most sharply felt in rural Canada. While urban households largely have the option to subscribe to high-speed access, the home access subscription options for many rural households are restricted to slower, less efficient dial-up access.

Table 7 a: Home Internet access
(per cent)

	HOME ACCESS		AS A PERCENTAGE OF ALL CANADIANS			
	Yes	No	High-speed	Dial-up	Other/ unidentified	No home access
REGION						
British Columbia	73	27	48	22	3	27
Alberta	69	31	46	19	4	31
Prairies	64	36	39	20	5	36
Ontario	72	28	39	28	5	28
Quebec	58	42	28	27	3	42
Atlantic Canada	62	38	28	30	4	38
LOCATION						
Urban	69	31	43	23	3	31
Rural	59	41	19	38	3	41

Q: Do you currently have access to the Internet at home?
BASE: All Canadians; Apr./May 2003; n=5182

Variance by Region

There are some differences in overall home Internet access penetration along regional lines, with the highest penetration in British Columbia (74 per cent) and Ontario (71 per cent). By contrast, households in Quebec (58 per cent) and Atlantic Canada (61 per cent) comprise Canada's least connected by region [Table 7a].

The penetration of high-speed home access along regional lines follows a slightly different pattern than overall penetration rates. High-speed home access penetration has an east to west orientation, with penetration rates rising incrementally from Atlantic Canada to British Columbia.

- 28 per cent of Atlantic and Quebec households have high-speed, leaving these regions as the least likely to have this level of home access.
- At 39 per cent, Ontario and Prairie households are slightly more likely to have high-speed relative to the national average.
- Alberta and British Columbia households are significantly more likely to have high-speed access, 46 per cent and 48 per cent respectively.

Variance by Rural/Urban Location

There continues to be a 10-percentage point gap in overall home Internet access penetration along rural/urban lines [Table 7a].

The gap in penetration of high-speed access is, however, far more pronounced. This substantial disparity is largely reflective of the continued need for investment in broadband infrastructure in rural areas.

- 59 per cent of rural households and 69 per cent in urban households have home Internet access.
- 43 per cent of urban households have high-speed Internet access.
- Less than half that number, 19 per cent, of rural households have high-speed Internet access.

Table 7 b: Home Internet access

(per cent)

	HOME ACCESS		AS A PERCENTAGE OF ALL CANADIANS			
	Yes	No	High-speed	Dial-up	Other/ unidentified	No home access
HOUSEHOLD INCOME						
< \$20K	42	58	23	17	2	58
\$20-39K	55	45	26	26	3	45
\$40-59K	70	30	38	29	3	30
\$60-79K	80	20	43	32	5	20
\$80-99K	86	14	56	27	3	14
\$100K+	89	11	59	25	5	11
HOUSEHOLD TYPE						
Couple with children	80	20	46	30	4	20
Unrelated adults	65	35	43	17	5	35
Single adult with children	68	32	41	24	4	32
Couple without children	64	36	32	29	3	36
Single adult	41	59	21	18	1	59

Q: Do you currently have access to the Internet at home?
 BASE: All Canadians; Apr./May 2003; n=5182

Variance by Household Income

Household income remains one of the single strongest predictors of home access penetration and type of home Internet access, with penetration and the speed of connectivity rising sharply with household income [Table 7b].

- 59 per cent of the highest income households (\$100K or more) have high-speed, with 11 per cent reporting they are without home access.
- By contrast, only 23 per cent of the lowest income households (less than \$20K) have high-speed Internet access, with a majority 58 per cent having no home access at all.
- Despite lower penetration rates overall, high-speed access is making inroads in lower income households. In fact, it is interesting to note that a larger proportion of the lowest income households have a high-speed Internet connection (23 per cent) than a regular dial-up connection (17 per cent).

Variance by Household Type

Lending credence to “we have it for the kids”, two parent families with children are the single largest consumers of home access subscription services by household type [Table 7b].

- 80 per cent of two parent families with children have home Internet access.
- 46 per cent of two parent families with children are high-speed access subscribers, more than double the proportion of this household type that are without home Internet access (20 per cent).

Table 7 c: Home Internet access
(per cent)

	HOME ACCESS		AS A PERCENTAGE OF ALL CANADIANS			
	Yes	No	High-speed	Dial-up	Other/ unidentified	No home access
AGE						
<25	79	21	53	21	4	21
25-44	75	25	43	28	3	25
45-64	65	35	35	27	3	35
65+	40	60	14	22	4	60
GENDER						
Male	70	30	42	24	4	30
Female	64	36	33	28	3	36

Q: Do you currently have access to the Internet at home?
BASE: All Canadians; Apr./May 2003; n=5182

Variance by Age²

Home Internet access penetration has a similar generational aspect observed in Internet usage trends. Younger Canadians are considerably more connected than seniors, being both more likely to have household access and more likely to have a high-speed Internet connection [Table 7c].

- Just slightly less than four in five Canadians less than 25 years of age (79 per cent) have home access; 53 per cent having high-speed.
- By contrast, two in five seniors (40 per cent) have home access to the Internet; 14 per cent have high-speed access.

Variance by Gender

While not as pronounced as differences by age, Canadian men are not only more likely to have access than women, but are also more likely to take advantage of superior high-speed access options [Table 7c].

- At 70 per cent and 42 per cent, men are significantly more likely to have home Internet access and have high-speed home Internet access than women (64 per cent and 33 per cent).

² Age, gender, employment status and type are individual characteristics rather than descriptors of an entire household and are therefore not necessarily the most effective way to shed light on the presence of household technologies. After all, the presence of a retired individual in a household does not preclude other members from being students or full-time professionals. Despite this acknowledged limitation results do vary significantly by the age, gender, employment status and type and have been included in the analysis.

Table 7 d: Home Internet access
(per cent)

	HOME ACCESS		AS A PERCENTAGE OF ALL CANADIANS			
	Yes	No	High-speed	Dial-up	Other/ unidentified	No home access
EMPLOYMENT STATUS						
Student	84	16	55	26	3	16
Full-time	74	26	44	26	3	26
Self-employed	76	24	42	30	5	24
Part-time	75	25	42	26	6	25
Unemployed	63	37	36	20	6	37
Homemaker	67	34	34	30	2	34
Retired	43	57	16	24	3	57
EMPLOYMENT TYPE						
Management or administrative	75	25	43	28	4	25
Professional	77	23	43	30	4	23
Sales, services, clerical	64	36	36	25	4	36
Skilled tradesperson	63	37	36	24	3	37
Semi-skilled	54	46	27	24	3	46
Labourer	57	43	30	23	4	43

Q: Do you currently have access to the Internet at home?
BASE: All Canadians; Apr./May 2003; n=5182

Variance by Employment Status

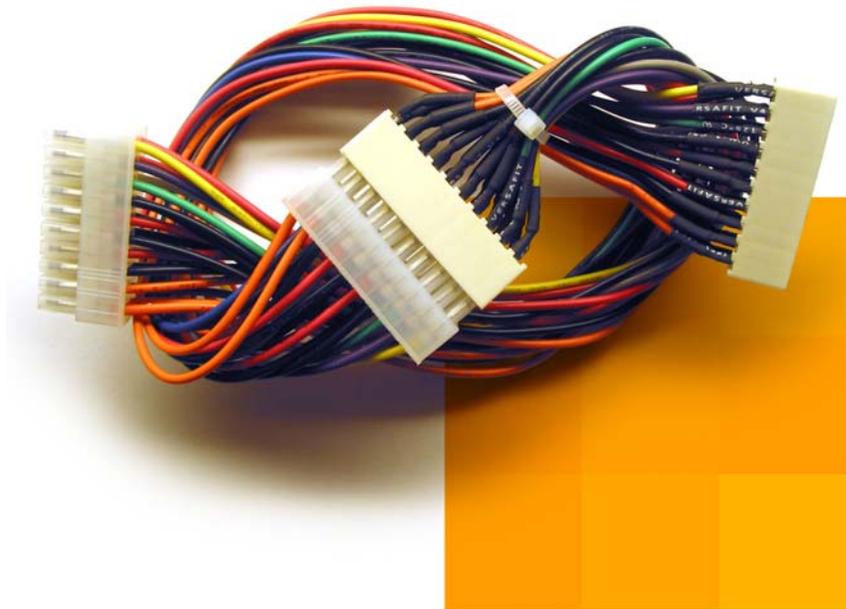
The presence of a household Internet connection varies significantly by employment status. As observed with usage patterns, this variation is most pronounced between those within and those outside of the labour force [Table 7d].

- Approximately three in four self-employed, part-time and full-time employed Canadians have household access to the Internet (76 per cent, 75 per cent and 74 per cent). These employed Canadians are also more likely to have high-speed, 42 per cent, 42 per cent and 44 per cent.
- While having only an average level of household access (63 per cent), unemployed Canadians are significantly less likely to have to rely on a dial-up connection at only 20 per cent.
- Students are the most connected with 84 per cent reporting household access; a majority 55 per cent have a high-speed connection at home.
- Slightly below the 50-percentile mark, 43 per cent of retirees report having household Internet access. With only 16 per cent having high-speed overall, most of the limited number of retirees with home access make use of slower less efficient dial-up connections (24 per cent).

Variance by Employment Type

Results also vary significantly by employment type [Table 7d].

- At 54 per cent and 27 per cent, semi-skilled are significantly less likely to have home or high-speed access.
- Similarly, despite attributing significantly higher importance to household Internet access (see Table 6d, page 68), 43 per cent of labourers have no household Internet access. 30 per cent, however, have high-speed.
- By contrast, 77 per cent and 75 per cent of professionals and those employed in management positions have access to the Internet. 43 per cent of each group have high-speed.



Future Role of Public Access Sites

Remaining In Step

Given Canada's rapidly changing information society, public access sites must re-evaluate and adjust priorities to continue to make a positive contribution to raising Canadians to the status of the world's most connected. Most recently, public access site usage has taken a back seat to home Internet usage and access. This holds true for some subgroups most at risk of being marginalized, most notably senior/retirees. That being said, public access sites continue to be important access resource for a significant minority of low-income Canadians and labourers (those least likely to have workplace Internet access).

Non-users attitudes indicate this trend will continue to deepen. While a lack of interest is cited by many, not having a computer or having a computer that is too old is perceived as a key barrier to usage for a large number of non-users. This is particularly the case for those who report an expectation to begin using the Internet in the next year.

When questioned as to why obtaining a computer and access at home was a necessary requirement for usage, focus group participants indicated that access from public locations is insufficient to met their or their family's needs and as such held little appeal.

These results indicate a strong and persistent belief that usage hinges on having access within the home. At this stage in the development of Canada's information society, public access sites have a changing role in providing Internet access services. On the one hand, the role of providing access to the general population is declining. On the other hand, public access sites and community networks are in an advantaged position to expand provision of computer and Internet skills development, as well as other forms of skills and learning programming to provide non-financial facilitation of home access options to disadvantaged Canadians and those most at risk of being marginalized. Strategically located public access sites also fill an important need to ensure that Canadians are able to access government and community information and services.

Public Access Sites and Skill Development

Despite increasing penetration and intensity of Internet usage and growing attributed importance to household access, comfort using computers has increased only marginally in the period between 2001 and 2003. Comfort has actually declined for non-users, while remaining largely unchanged for Internet users — even though a majority of users have now been online for more than two years [Figure 12].

- Percentage of Canadians indicating “high comfort” (5 to 6 on a 7-point scale) using computers increased by 5-percentage points between 2000 and 2001, but increased by only 2-percentage points from 2001 to 2003.
- 45 per cent of non-users report low comfort using computers, up from 39 per cent in 2000.
- 63 per cent of Internet users report a high level of comfort using computers, virtually unchanged from 2000.

Public access sites and community networks are in a position to narrow this skill gap, as well as provide more advanced community-based learning and skills development initiatives. Current non-users and late adopters are significantly less likely than those who began using the Internet even two years ago to be in a position to develop computer and Internet skills at work or school. This leaves many to rely on friends to provide instruction, develop skills as best they can on their own, or continue to remain offline. Within this context, public access site provided computer and Internet usage skills development might make the difference for those most at risk of marginalization.

More than a third of Internet non-users report they would be more likely to use the Internet if someone sat down with them and showed them how to use it. The impact of skills development is particularly evident for “near user” segments [Figure 13, Table 8].

- 36 per cent of non-users agree they would be more likely to try the Internet if they had someone take the time to show them how to use it.
- 51 per cent of Internet users disagree.
- Agreement rises to 72 per cent and 45 per cent for “new near users” and “re-joining/accelerating users”.

“I would want a training program to show me how to hook up my computer to get access at home.”

(Winnipeg, far non-user)

“It has got to be very basic. Something for beginners like Internet and computers for dummies.”

(Winnipeg, far non-user)

While not unanimous, during focus group discussions both “near” and “far non-users” expressed a high level of interest in computer and Internet usage training. When asked to describe the type of material that should be covered and what an appropriate starting point should be, those expressing interest stated that development programs should begin with the absolute basics of computer ownership and Internet usage.

Focus group participants indicated skills should be transferable to home computer usage and home Internet access. To this end, “near” and “far non-user” focus group participants indicated that training should begin basic computer ownership-related skills. Specific

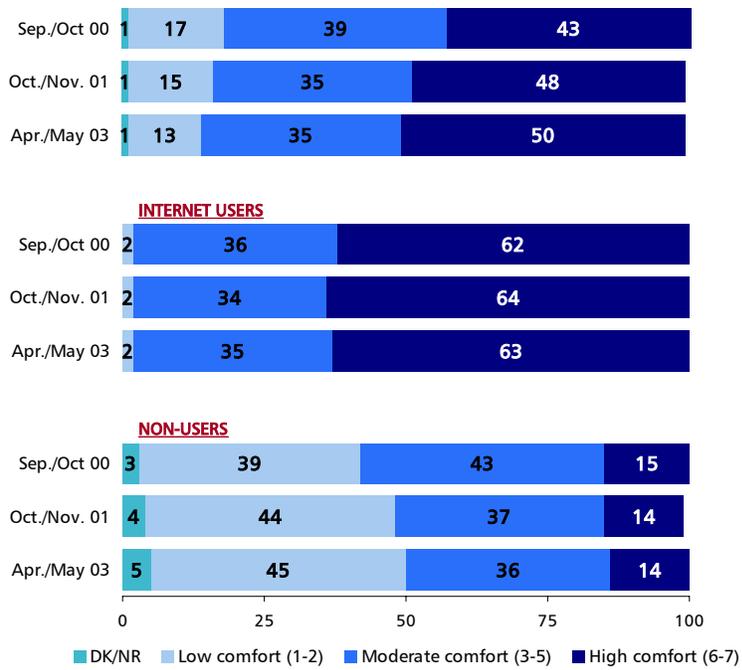
examples of this type of training included how to plug in a computer and its components (i.e., keyboard, monitor, printer) and how to safely turn the machine on and off. The fear of some non-users of pushing the wrong button and doing irrevocable damage to a computer is genuine.

From plugging a computer in, non-user participants expressed a desire for instruction in how to purchase a computer and what would they need to obtain home Internet access. Participants indicated they did not trust retailers to provide accurate information, and that a third party resource would provide them with unbiased information and possibly a connection to programs that may help them to obtain a refurbished computer or better understand non-computer home access options in the community (Web-TV).

Focus group participants believed general computer and Internet-related software skills development should follow once base skills and options for home computer ownership have been provided. Where possible and appropriate, participants further indicated software skills development should be transferable to and facilitate usage from primary access locations, specifically the home and the workplace. Creating linkages between skills programming and usage from primary locations will increase the perception that public access sites enhance usage, and reduce the belief these sites are an unappealing peripheral alternative to home or workplace Internet usage.

Fig. 12
Comfort using computers

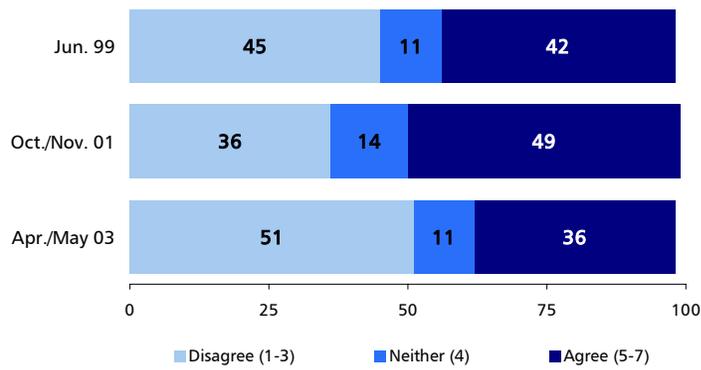
Q: How comfortable are you using computers?



BASE: All Canadians; Apr./May 2003, n= 4,160

Fig. 13
Learning how to use the Internet

Q: I would be more likely to try the Internet if I had someone take the time to show me how to use it.



BASE: Internet non-users; Apr./May 2003, n= 1381

Table 8: Internet non-user segmentation
(per cent)

	NEAR USERS		FAR USERS	
	New near users	Re-joining/ accelerating users	Drop-out/ infrequent users	Core non-users
Agree (5-7)	72	45	29	28
Neither (4)	10	11	15	9
Disagree (1-3)	17	41	54	60

Q: I would be more likely to try the Internet if I had someone take the time to show me how to use it.
BASE: Non-users; Apr./May 2003, n= 1360

Multi-Channel Imperative

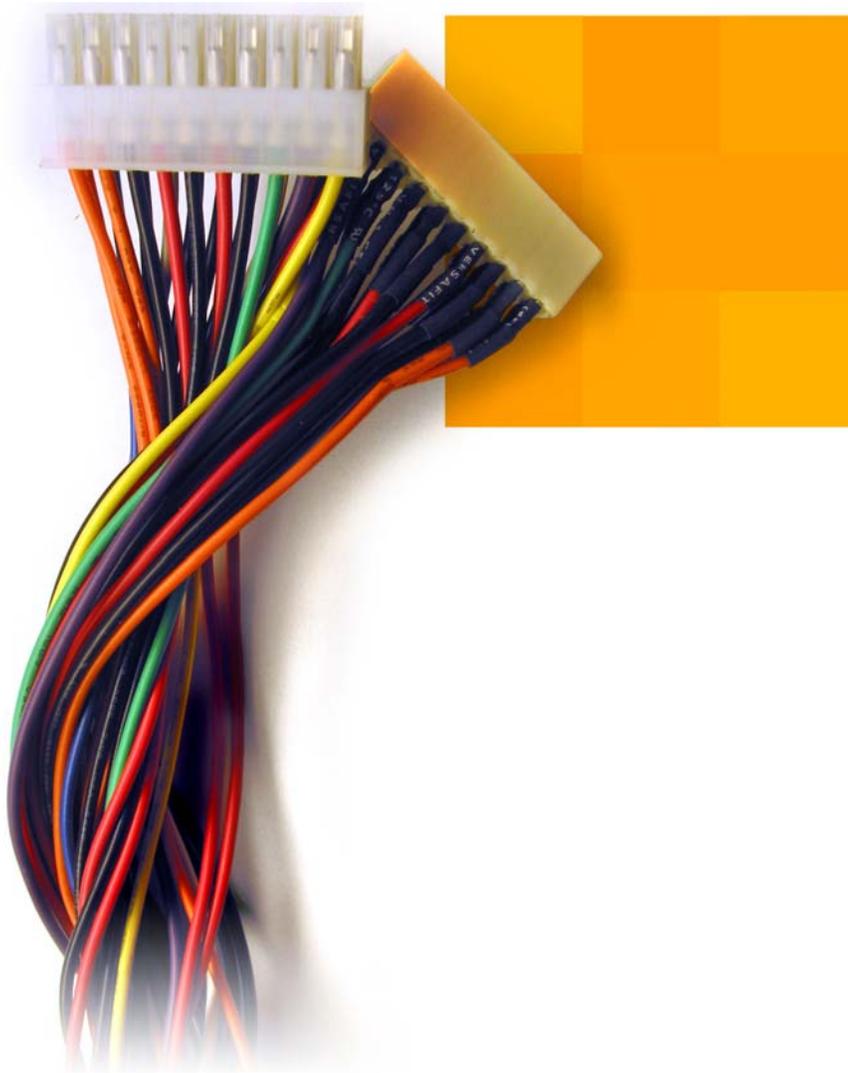
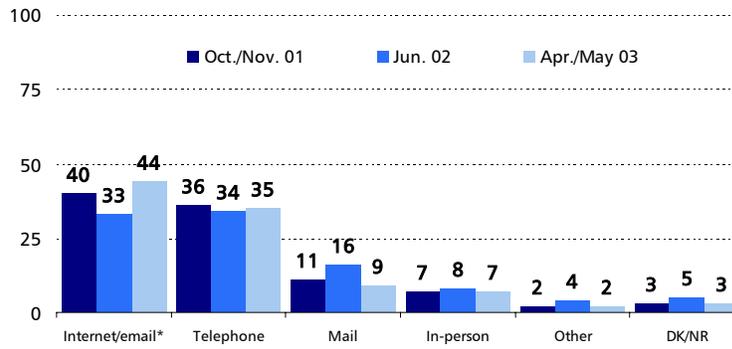
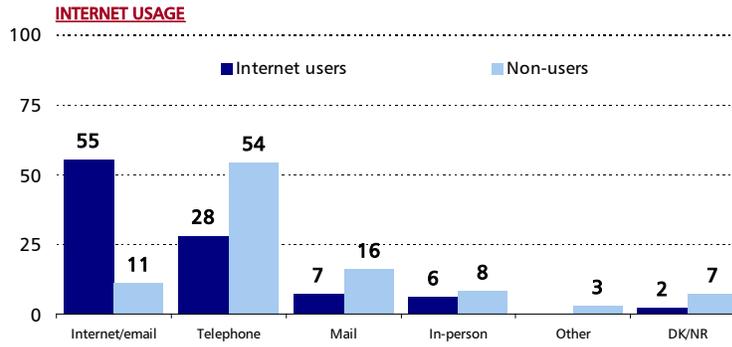


Fig. 14
Method of contact in the future

Q: Thinking about two years from now, what do you think will be your main method of contact with government?



* Prior to 2003, Internet and email service channels were combined. Internet 37%, email 7%



* Prior to 2003, Internet and email service channels were combined. Internet 37%, email 7%

BASE: All Canadians; Apr./May 03, two years; n=2,113

Results indicate the **Internet**, while expected to be a central service channel, is **only one part of** a larger **service delivery toolbox**.

Principles of Equality and Multi-Channel Service Delivery

The principle of equality reinforces the importance of ensuring all citizens have the option to make use of the Internet and the continued support for select public access sites in communities across Canada. At the same time, however, this principle also reinforces the importance of ensuring that those who are not able or who do not wish to use the Internet retain the ability to access the same or substantively similar information and services. This latter point is a central driving factor for maintenance of a multi-channel approach to service delivery.

The imperative to continue to implement a multi-channel approach to service delivery is further supported by the tendency of both Internet users and non-users alike to rely on different service and information channels or a combination of channels to satisfy information needs or complete a transaction with government.

As shown in Figure 14, no single channel surpasses the 50-percentile milestone as the expected main method of contact in two years. Internet/email reaches majority status for Internet users, telephone doing the same for non-users, but in each case only by a relatively small margin.

- 44 per cent of Canadians expect Internet/email to be their main method of contact with government in two years, 35 per cent indicate telephone.
- 55 per cent of Internet users believe the Internet/email will be their main method of contact with government in two years. 11 per cent of current non-users report the same.
- At 54 per cent non-users are significantly more likely to report reliance on the telephone as their main method of contact with government in the next two years. This number falls to 28 per cent for Internet users.

“There is an assumption being made that if you don’t have the technology, you are not an equal citizen.”

(Ottawa, new user)

“I think that it is wrong, because a lot of people can’t get to the Internet. You are only getting the information to a certain majority.”

(Winnipeg, new user)

“It is alarming. They are not providing information to enough people. They were reckless and took a real gamble the information would get to the people who needed it.”

(Winnipeg, far user)

“By using the Internet you would not get the information to seniors and there are more seniors today than there was before.”

(Winnipeg, far user)

“It is not fair, it is important that everybody has the same access to information.”

(Winnipeg, far user)

Focus group participants indicated they used several different channels when searching for government-related and other types of information. Personal networks, telephone directories and in-person contact at government offices were some of the most common channels used by “near” and “far non-users”. Late adopter “new users” made significant use of the Internet to find the information they needed, but often indicated they used it in conjunction with other traditional resources, such as the telephone, mail and in-person channels.

Focus group participants were also asked to comment on Health Canada’s reliance on the Internet to distribute breaking updates and rapidly evolving information regarding symptoms and precautionary measures during the SARS crisis. Reactions were both immediate and intensely negative for “new user”, “near non-users”, and “far non-users” alike.

Participants made it clear that the practice of a government department relying on a single service channel to provide potentially critical information was an affront to principles of equality. It made little difference to Internet users that they would have been able to access the information themselves; the idea that others could not directly access the same information they could was disturbing. For those who were unable, or did not choose to use the Internet, the perceived exclusion was felt much more personally, but was motivated by the same desire for fairness and equality.

A large number of focus group participants further noted they were not aware that Health Canada was providing information online. These participants indicated that more should have been done to communicate the availability of this information through other traditional channels. It was viewed that this would have better enabled “new users” to take a multi-channel approach to seeking information on SARS. Further, “near” and “far non-users”, a number of whom report they experience the Internet by proxy through members of their social group, indicated may have been able to request friends and family obtain online information on their behalf if they were made aware of its availability.

“It should have been stated in the newspaper and the news. We should have known, we should have been told that if you want further updates go to www.healthcanada whatever.”

(Winnipeg, new user)

Conclusions

1. In only a few years, the Internet has become an important part of Canada's cultural experience. A large majority of Canadians have used the Internet in the past three months, many doing so daily. Still others have had at least some direct experience using the Internet. Even a large number of those with no personal experience using the Internet indicate they often experience it by proxy through their interactions with friends and family.
2. Many of those least likely to have access at home or at work do not view public access sites as a viable alternative. The household is the central hub for Internet usage for all Internet users regardless of geographic, demographic, income or employment profile and is synonymous with connectivity. Even workplace usage, the second most pervasive usage location, trails the home by 47-percentage points in terms of recent usage. Public access site usage is limited, reaching only a small minority of Internet users from even targeted disadvantaged subgroups. Further, a lack of a home computer is cited as a principle barrier for non-users, with public usage tends to hold little appeal for potential late-adopters.
3. To remain in step with Canada's rapidly changing information society, public access sites must re-evaluate the role they play in making Canada the most connected nation in the world. Emphasis must be adjusted to place priority on the continued availability of strategically located public access sites to ensure all Canadians can access government and community information/services and skills development and training programs. Given the lower likelihood non-users and late adopters are able to develop computer and Internet skills at school or the workplace, public access sites are in a position to fill the existing skills gap and provide programming to these target populations at risk of marginalization.

4. Skill development should be orientated to complementing and facilitating home, and to a lesser degree, workplace usage. These programs should begin with basic computer set-up and usage (how to plug in a PC and turn it on/off), purchasing a computer/refurbished computer and available non-computer orientated home access options (Web TV). Computer and Internet usage-related software skills development should build from this base and be transferable to and facilitate home and workplace usage. Creating linkages between skills programming and usage from primary locations will increase awareness of the changing role of access as a strategic component of a basket of information and service channels and enhance usage by those not yet connected, as well as reduce the belief public access sites are an unappealing peripheral alternative to home or workplace Internet usage.

5. Disproportionate availability of high-speed Internet infrastructure is presenting an additional divide between those households who have Internet access. This emerging divide is most acutely felt between rural and urban households. Rural Canadians are significantly less likely to be able to subscribe to high-speed Internet services and are consequently unable to access a substantively similar level of home access enjoyed by urban Canadians. Continue investment in broadband infrastructure will be a key determinant of the full inclusion of rural communities in Canada's evolving information society and global economy.

6. The principle of equality is an important driver behind initiatives to ensure all Canadians are able to access the Internet and the opportunities presented by the global online community. This same principle, however, requires that those who choose to remain offline retain the ability to access substantively similar government-related information and services as those made available to Internet users. As such, government at all levels must continue to maintain a multi-channel approach to government information and service delivery.

Appendix A: Moderator's Guides

Dual Digital Divide: Qualitative Research Project

Moderator's Guide

Guide for New-Users

A. Introduction [10 minutes]

Before the discussion begins, the moderator briefly introduces him/herself and explains the purpose of the group discussion, noting:

- Purpose of the study and focus group;
- Observation, audio recording and confidentiality;
- Explanation of format, “ground rules” and role of moderator; and
- Participant introductions (i.e., first name and nature of employment/stage of study, type of work interested in obtaining, etc.).

B. Current Information Search Techniques and Sources [10 minutes]

1. How do you currently find information about government or city services, community events or products you are thinking of buying? [Go around the table]
 - Are there one or two sources of information you rely on most?
 - Do you rely on different sources of information for government or city services... for community events... for products you are thinking of buying?

2. How did you find information about government or city services, community events or products you are thinking of buying BEFORE you started using the Internet?
 - Is it easier to find the information you need since you started using the Internet?
 - Do you search for information more often since you began using the Internet?

C. General Experience [50 minutes]

3. Has everybody here used the Internet before? When did you first start using the Internet [Go around the table]
4. So, most of you started using the Internet quite recently. Can you tell me why you started (or what made you start) using the Internet recently?
5. Before you started using the Internet, did you expect that you were going to start using the Internet? Or was it something that you did not expect to start using?

Barriers to Internet usage

6. The Internet has existed for quite a few years now, but you only started using it recently. Can you tell me why that is? What took you so long to start using the Internet? Were there barriers that prevented you from using the Internet?
 - [Some of you mentioned that you were not interested in using the Internet]
 - Why do you say this?
 - How did you overcome this? Do you still feel the same way?
 - [Some of you mentioned that you thought that there was no need for you to use the Internet]

- Why do you say this?
- How did you overcome this? Do you still feel the same way?
- [Some of you mentioned that you were concerned about safety of the Internet]
 - Why do you say this?
 - How did you overcome this barrier?
- [Some of you mentioned that you were not comfortable with technology]
 - Why do you say this?
 - How did you overcome this barrier?
- [Some of you mentioned that the reason you did not use the Internet is because of cost/can't afford it]

7. What kinds of things have you used the Internet for so far?

- Searching for information? [Email? Gaming? Banking? Buying things? Interacting with governments?]
- Did you start doing these things the first times you went online, or did it take a while before you were comfortable doing things online?

8. What kinds of things do you expect to be doing on the Internet in the coming year?

- Searching for information? Email? Gaming? Banking? Buying things? Interacting with governments?
- Why/Why not?
- Do you have any concerns regarding these activities that are preventing you from doing them?

D. Health [25 minutes]

Now that we have an idea about using and accessing the Internet, we are going to talk about using the Internet when it comes to health issues.

9. Has anybody here ever searched for health information, for example, information on an illness, a condition or how to make healthy choices in diet and lifestyle?
 - What kind of information did you look for?
 - Where did you search for this information?
 - Did you find the information you were looking for? Where did you find it?

10. What about using the Internet to find health information?
 - What kind of information did you look for?
 - Where did you search for this information? Using what websites?
 - Did you find the information you were looking for? Where did you find it?

11. What about major health issues? Can anybody think of a major health issue that has been in the news? [PROMT IF NECESSARY: SARS, West Nile, Walkerton, flu epidemic, the Norwalk virus]. Did anybody search information concerning these issues?

12. Now, what about the recent issues surrounding SARS? (Does everybody remember the SARS outbreak in Toronto last spring)? At the time, were you interested in finding information on SARS?
 - How did you find information on SARS? From what sources?
 - Do you feel you had enough information?
 - Did you find that the information you were accessing was current enough?
 - Do you know anybody that used the Internet to find information on SARS?

13. Like with any major health issue in Canada, such as West Nile virus, Mad Cow disease Walkerton and safe drinking water and Norwalk for example, Health Canada was involved in providing information to Canadians about SARS.
- How do you think that Health Canada was providing information to Canadians about SARS? Through TV? Newspapers? the Internet?
 - What do you think is the best way for Health Canada to provide information about SARS to Canadians?
14. You might remember that the situation with SARS evolved very rapidly and the information regarding symptoms and precautionary measures changed often, sometimes daily. For that reason Health Canada provided information on SARS only through the Internet because they could update the website as often as they needed.
- What do you think of this? Is this how you want to access this type of information?
 - Why do you think that Health Canada chose to use the Internet for providing information on SARS? What are the benefits of using the Internet in this circumstance?
 - And what are the disadvantages?
15. As we have discussed, it is possible to visit the Health Canada website to get the latest information on health issues such as SARS or Mad Cow disease. However, it is possible to do many more things related to health online. For example, there are resources that help people quit smoking, or eat a more healthy diet. More recently, it has been possible for people to send email to their doctors and for doctors to give patients addresses for websites where they could look up information on specific conditions. There are also online support groups for people or their family members living with conditions such as cancer or diabetes to share their experiences and help each other. It is now also possible for doctors at different hospitals and clinics to be connected by Internet. For example, a specialist living in Toronto could communicate over the Internet to a nurse in Nunavut to help the nurse treat a patient.
- What do you think of interacting with health care professionals over the Internet? Would you be interested in sending an email to your doctor? Or receiving a list of online resources from her?
 - What are the benefits? What are the disadvantages?

E. Workplace and Training [25 minutes]

Now that we have talked about using and accessing the Internet and the Internet and health issues, we are going to change gears and discuss the workplace and training.

Workplace

16. When we were discussing having access to the Internet, some of you mentioned that it is possible to have access to the Internet at your workplace. Could you ever access the Internet in your workplace if you chose to do so?
- Do you use the Internet at work?
 - Why/why not?
 - Up until you recently started using the Internet, did you feel that you were at a disadvantage as a non-user in your workplace?

Training

17. These days, in the course of a person's career, they may need to take training. People may take training in order to start a new job, to pursue a different career, to upgrade their skills to move up in their job or to learn a new system or way of doing things to retain their current job. What about training? Have any of you taken any kind of training courses for your work in the past year? What kind of training was this?
18. Are you interested in taking any training? Why/why not?
19. Is it possible to take training on computers or the Internet with relation to your job?
- Would you be interested in taking this type of training?
 - Why/why not?
20. And are any training courses available over the Internet? Meaning that it is possible to learn about a subject by following a course that takes place on the Internet?

- Would you be interested in taking this type of training?
- Why/why not?

F. CONCLUSION [5 minutes]

21. Is there anything else you would like to add before we end the discussion?

THANK YOU VERY MUCH FOR YOUR PARTICIPATION

Dual Digital Divide: Qualitative Research Project

Moderator's Guide

Guide for Non-Users (Near and Far)

A. Introduction [10 minutes]

Before the discussion begins, the moderator briefly introduces him/herself and explains the purpose of the group discussion, noting:

- Purpose of the study and focus group;
- Observation, audio recording and confidentiality;
- Explanation of format, “ground rules” and role of moderator; and
- Participant introductions (i.e., first name and nature of employment/stage of study, type of work interested in obtaining, etc.).

B. Current Information Search Techniques and Sources [10 minutes]

1. How do you currently find information about government or city services, community events or products you are thinking of buying? [Go around the table]
 - Are there one or two sources of information you rely on most?
 - Do you rely on different sources of information for government or city services... for community events... for products you are thinking of buying?

C. General Experience [50 minutes]

2. Can you describe your experience with personal computers (PCs)? [Go around the table]

- Have you ever used a PC before?
 - Is there a PC in your household? In your workplace? Do your children use a PC at school?
3. And what about your experience using the Internet?
- Have you ever used the Internet before? How long ago was this?
 - Is the Internet used in your household? In your workplace? Do your children use the Internet at school?
4. Do you know someone who uses the Internet regularly? A child/parent/friend?
- What do they use the Internet for?
5. What would you say is the main reason why you have never used the Internet, or have not used it recently?
- [Some of you mentioned that you are not interested in using the Internet]
 - Why do you say this?
 - Is there any specific type of thing that you would be interested in doing on the Internet?
 - [Some of you mentioned there is no need for you to use the Internet]
 - Why do you say this?
 - Can you think of a situation where you would need to go online?
 - [Some of you mentioned that you are concerned about safety on the Internet]
 - Why do you say this?
 - What would make you more comfortable about safety online?
 - [Some of you mentioned that you are not comfortable with technology]

- Why do you say this?
 - What would help you become more comfortable using technology?
 - [Some of you mentioned that the reason you do not use the Internet is because of cost/can't afford it]
 - What about using the Internet in a public place where access is free? Would you be interested in accessing the Internet in a public place? Why/Why not?
6. Do you expect to start accessing the Internet/accessing it more regularly in the next year?
- Why? Why not?
7. There are now three in four Canadians using the Internet. Why do you think so many Canadians are using the Internet? What is the Internet all about?
- What can you do with the Internet?
 - What is it good for?
8. What about email? What can you do using email?

9. Let me give you a brief overview of the Internet. Basically, the Internet connects millions of computers all around the world. Because all these different computers are connected, they can share information between each other. One of the most common things that people use the Internet for is email. Email lets people send messages to others across the city, or across the country in just a few moments. More recently, Internet users have started sending digital photographs over the Internet as well.

Another thing that some people do online is their banking. By connecting to a bank's website on the Internet, people can use their account number and a password to access information on their bank accounts. They can also transfer money from one account to another and pay some bills on the Internet, just like they would at the bank, or over the telephone using telephone banking.

Some people also buy things on the Internet. You might have heard of online stores such as Amazon.com or Chapters.ca where you can buy books on the Internet and they will ship them to your door by mail. It is also possible to buy rare items on the Internet that you might not be able to find in your city, such as collectable hockey cards.

Also, governments are increasingly starting to offer information and programs and services over the Internet. Did you know, for example, that it is now possible to send your income tax return over the Internet to the Canada Customs and Revenue Agency?

Even though it is possible to do all these things online, one in four Canadians is not using the Internet. Do you think you are missing anything by not going online?

- What about email? Are you missing out because you do not use email?
- What about digital images? Are you missing out because you do not send images by email?
- What about e-commerce? Is being able to buy goods online something that you are missing out on?
- What about searching for information? Is this something you are missing out on?

10. Suppose that someone showed you how to use the Internet. Would you be more inclined to start using it?

- What would they need to show you?

11. Suppose that you could access the Internet at school or in a government office. Would you be interested in accessing the Internet there? Why/Why not?

D. Health [25 minutes]

Now that we have an idea about using and accessing the Internet, we are going to talk about using the Internet when it comes to health issues.

12. Has anybody here ever searched for health information, for example, information on an illness, a condition, or how to make healthy choices when it comes to diet and lifestyle?
- What kind of information did you look for?
 - Where did you search for this information?
 - Did you find the information you were looking for? Where did you find it?
13. What about major health issues? Can anybody think of a major health issue that has been in the news? [PROMT IF NECESSARY: SARS, West Nile, Walkerton, flu epidemic, the Norwalk virus]. Did anybody search for information concerning these issues?
14. Now, what about the recent issues surrounding SARS? (Does everybody remember the SARS outbreak in Toronto last spring)? At the time, were you interested in finding information on SARS?
- How did you find information on SARS? From what sources?
 - Do you feel you had enough information?
 - Did you find that the information you were accessing was current enough?
 - Do you know anybody that used the Internet to find information on SARS?
15. Like with any major health issue in Canada, such as the West Nile virus, Mad Cow disease, Walkerton and safe drinking water and Norwalk for example, Health Canada was involved in providing information to Canadians about SARS.
- How do you think that Health Canada was providing information to Canadians about SARS? [Through TV? Newspapers? the Internet?]
 - What do you think is the best way for Health Canada to provide information about SARS to Canadians?
16. You might remember that the situation with SARS evolved very rapidly and the information regarding symptoms and precautionary measures changed often, sometimes daily. For that reason Health Canada provided information on SARS only through the Internet because they could update the website as often as they needed.

- What do you think of this?
 - Why do you think that Health Canada chose to use the Internet for providing information on SARS? What are the benefits of using the Internet in this circumstance?
 - And what are the disadvantages?
17. As we have discussed, it is possible to visit the Health Canada website to get the latest information on health issues such as SARS or Mad Cow disease. However, it is possible to do many more things related to health online. For example, there are resources that help people quit smoking, or eat a more healthy diet. More recently, it has been possible for people to send email to their doctors and for doctors to give patients addresses for websites where they could look up information on specific conditions. There are also online support groups for people or their family members living with conditions such as cancer or diabetes to share their experiences and help each other. It is now also possible for doctors at different hospitals and clinics to be connected by Internet. For example, a specialist living in Toronto could communicate over the Internet to a nurse in Nunavut to help the nurse treat a patient.
- What do you think of accessing health information this way?
 - What are the benefits? What are the disadvantages?
 - Do you feel like you are missing out because you do not have access to this type of health resources?

E. Workplace and Training [25 minutes]

Now that we have talked about using and accessing the Internet and the Internet and health issues, we are going to change gears and discuss the workplace and training.

Workplace

18. When we were discussing having access to the Internet, some of you mentioned that it is possible to have access to the Internet at your workplace. Do you work at a plant, office or other workplace location that has access to the Internet?

- Why have you never used the Internet in your workplace/ or why have you not done so recently?
 - Who accesses the Internet in your workplace? Why do they do so?
19. Can you see any opportunity to use the Internet in the type of work that you do? Or in the type of work that you are looking for?
- Why/Why not?
20. Do you think that you could get a promotion with your current employer or have the possibility of changing jobs if you started using the Internet?
- Would this be a positive move/something that you would be interested in pursuing?

Training

21. These days, in the course of a person's career, they may need to take training. People may take training in order to start a new job, to pursue a different career, to upgrade their skills to move up in their job or to learn a new system or way of doing things to retain their current job. What about training? Have any of you taken any kind of training courses for your work in the past year? What kind of training was this?
22. Are you interested in taking any training? Why/why not?
23. Would you be interested in taking training to help you become more skilled at using personal computers or the Internet? Does your employer offer this type of training or encourage it?
24. What about training on other subjects related to your occupation. Does your employer offer any training opportunities? And are any training courses available through correspondence or distance education? Do any of these include computer-based training on a CD or training that can be completed in part or entirely over the Internet? Would you be interested in taking training that you could complete in part or entirely over the Internet?

- Why/why not?

25. Do you know anybody in your workplace that has taken training over the Internet?

- Do you feel that you are missing out on certain opportunities because you are not using the Internet at work?

E. CONCLUSION [5 minutes]

26. Is there anything else you would like to add before we end the discussion?

THANK YOU VERY MUCH FOR YOUR PARTICIPATION

