

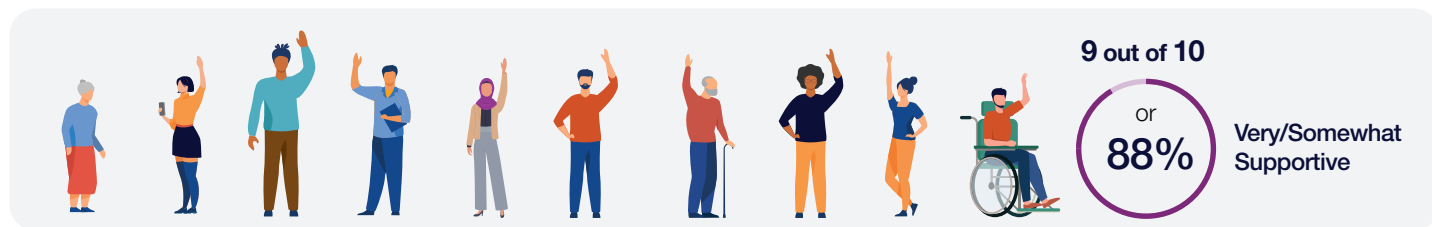


Canadian Digital Identity Research 2020

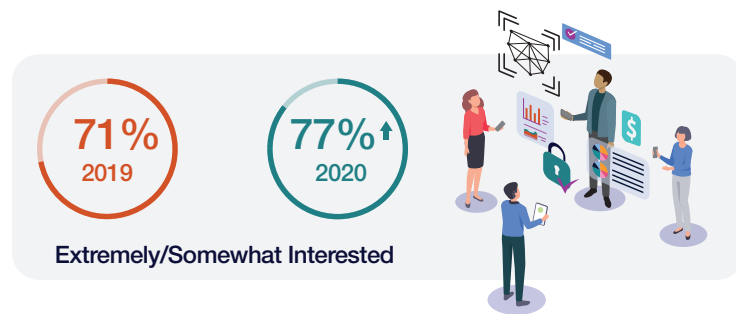
February 2021

Canadians' Perspectives on Digital Identity

9 in 10 Canadians are supportive of digital ID.

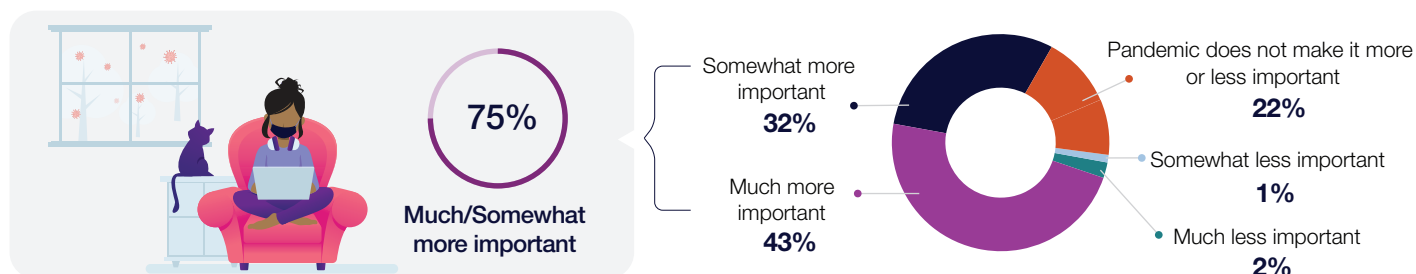


Canadians want to learn more about digital identity.



A significant majority of Canadians believe that digital ID is important to the digital economy.

The Pandemic has made digital ID more important than ever.

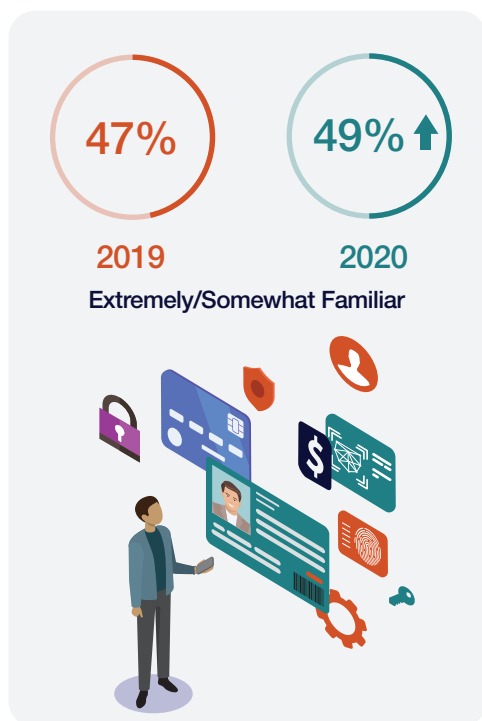


Canadians are looking to their elected officials to make digital ID a priority.

4 in 5 Canadians believe that it is somewhat/ very important that governments move quickly to enable safe and secure digital ID for all Canadians. Respondents are looking to both the federal and provincial governments to take action.



Similar to 2019, 1 out of 2 Canadians continue to be familiar with the concept of “digital identity”, with a notable increase in familiarity with biometrics.



Online passwords

? Answering knowledge-based questions digitally

Logging into social media accounts

Biometrics

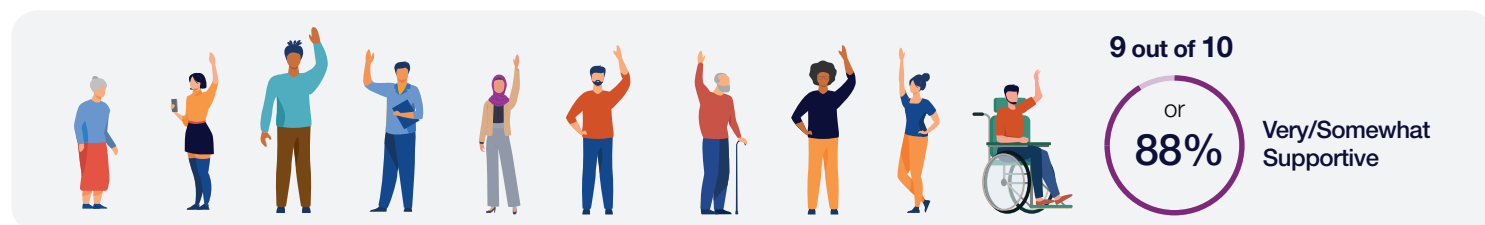
✕ None of the above

Which of the following...

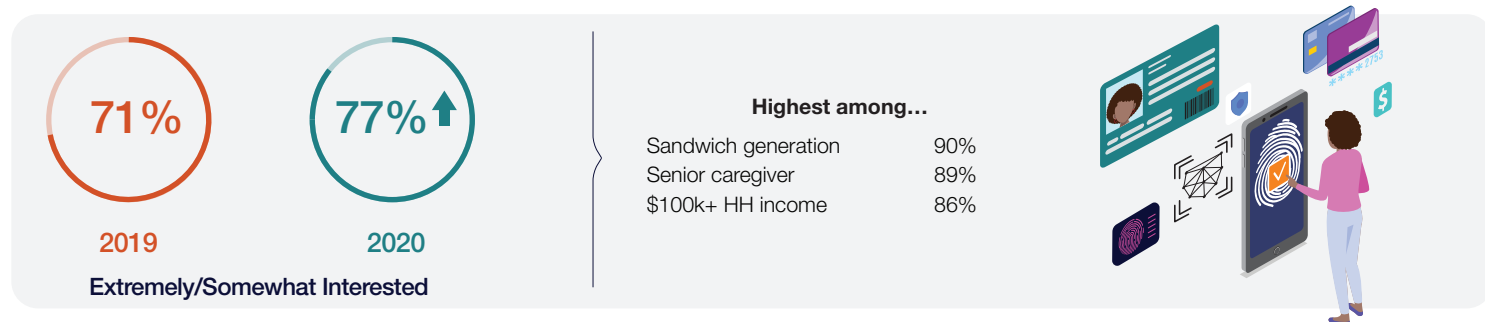
Fit within your definition of “digital identity”	Have you personally used
57%	54%
55%	53%
56%	52%
52%	49%
54%	48%
50%	45%
55%	27%
61% ↑	35% ↑
13%	22%
9%	21%

● 2019 ● 2020

After reading how digital ID will efficiently redistribute one-on-one support to those who need it most, approximately 9-in-10 Canadians stated they are supportive of the digital ID concept.



77% of Canadians are more interested in learning about the benefits and capabilities of “digital identity”.†

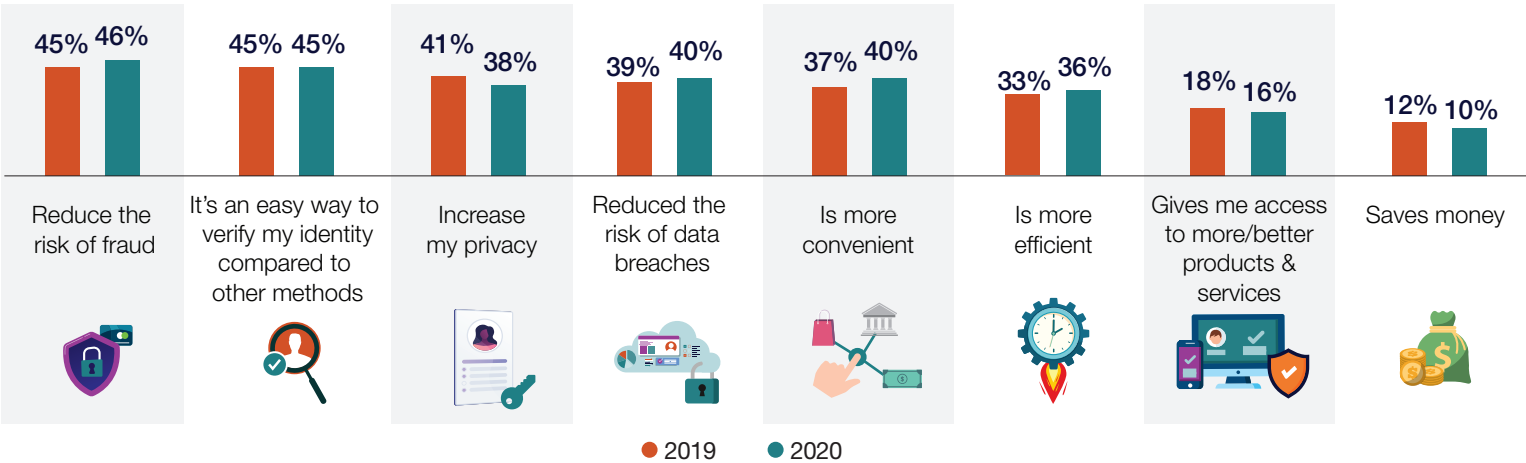


† DEFINITION OF DIGITAL IDENTITY

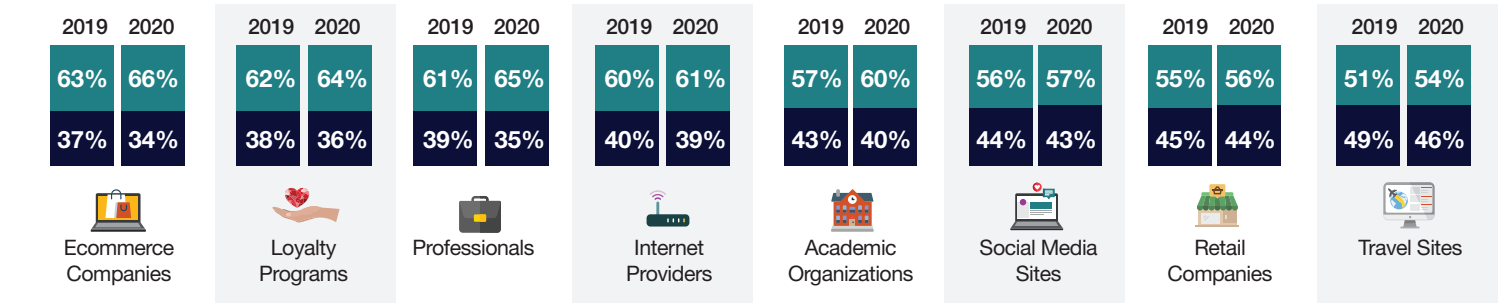
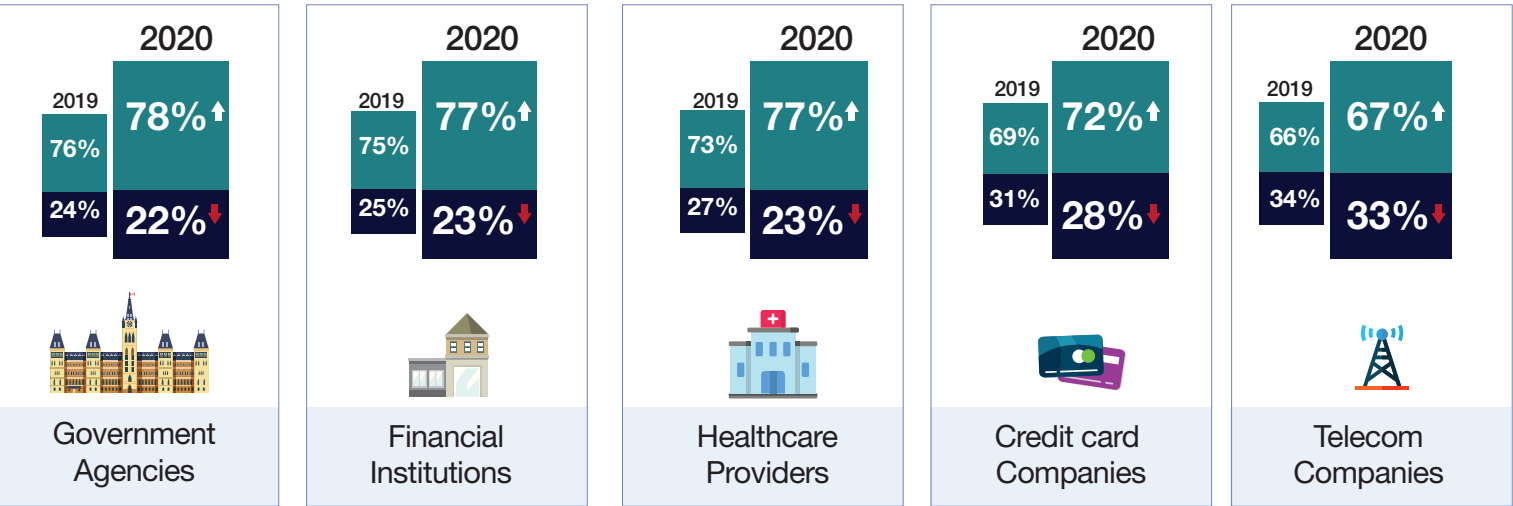
A person’s digital identity is an amalgamation of attributes and information available online that can bind a persona to a physical person. It’s similar to the way that your name and an ID card make up your identity in the physical world.

While digital ID can help to prevent fraud and increase privacy; it’s also about asserting who we are in this society. People are interacting more and more online making it necessary for businesses and government to adapt and ensure people claim who they are in the digital economy.

Reducing fraud and being an easy way to verify one’s identity continue to be seen as the main benefits of “digital identity”.

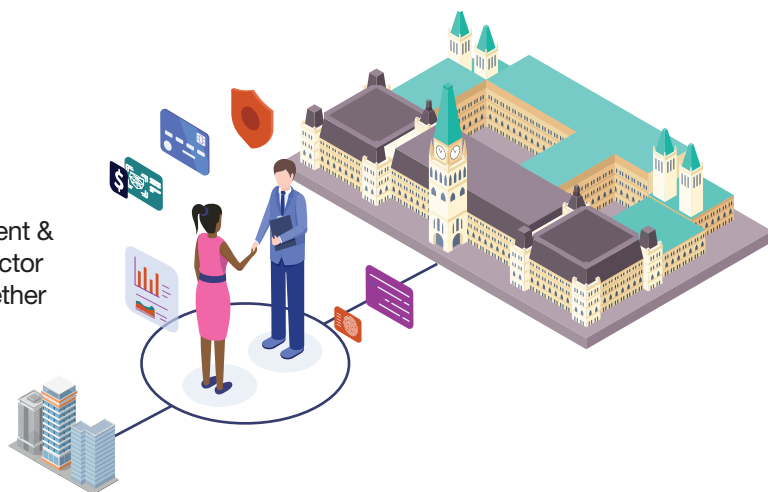
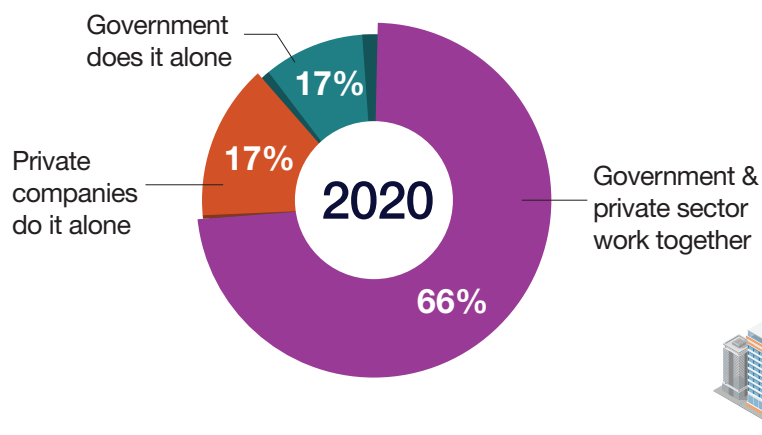


Interest in using digital ID authentication continues to be high for a variety of organizations, particularly government agencies, financial institutions and healthcare providers.

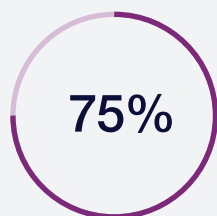


● Extremely/Somewhat interested ● Slightly/Not at all interested

A significant majority of Canadians believe that a collaboration between governments and the private sector is the best approach for creating a pan-Canadian digital ID framework.



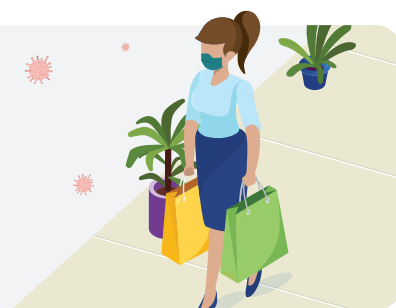
Three-quarters of Canadians believe COVID-19 has made having a digital ID more important.



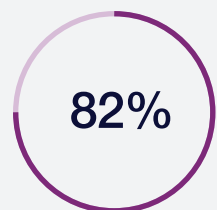
Much/Somewhat more important

Greater importance among...

Soccer parent	80%
Sandwich generation	82%



4-in-5 Canadians believe it is important that governments - both federal and provincial - move quickly to enable a trusted & secure digital ID for all.



Very/Somewhat more important

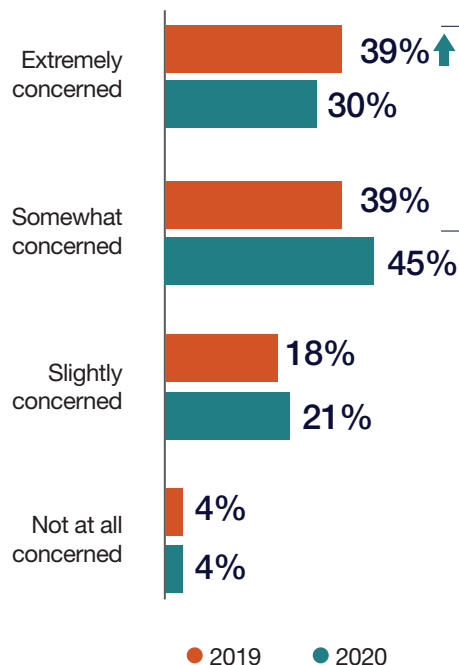
Greatest importance among...

	Federal
Sandwich generation	62%
Senior caregiver	54%
55+	47%

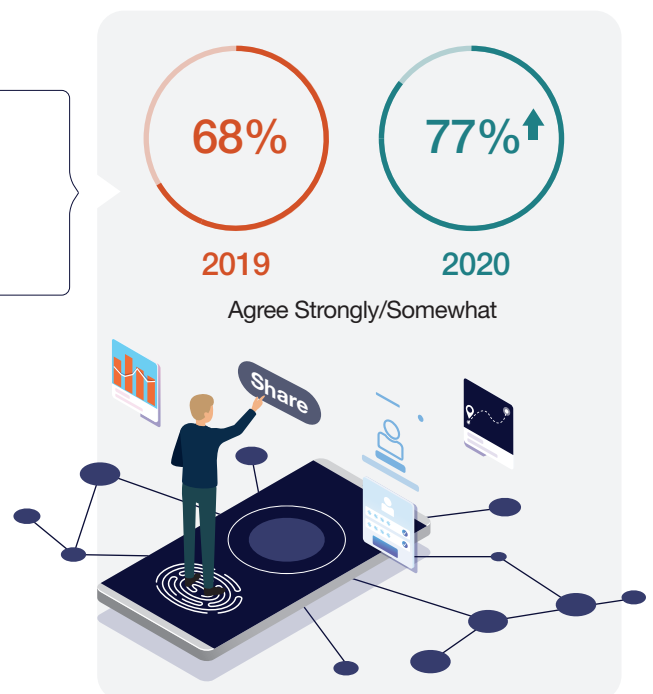
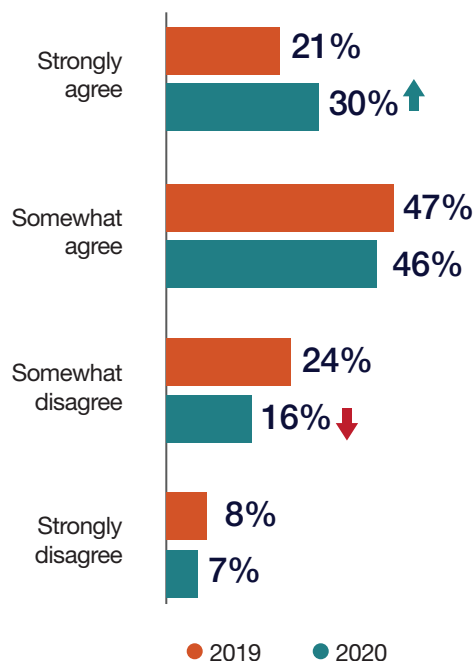


Canadians are more willing to share personal info online relative to 2019; while being less concerned about their information being compromised.

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



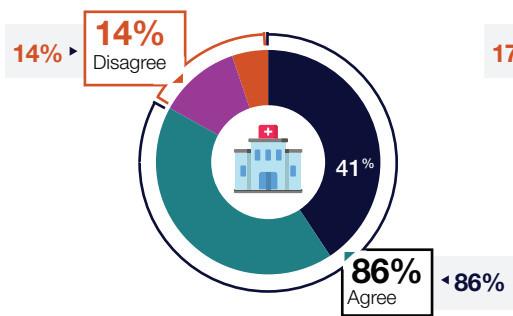
I am willing to share more of my personal information online if it makes my experience online more convenient.



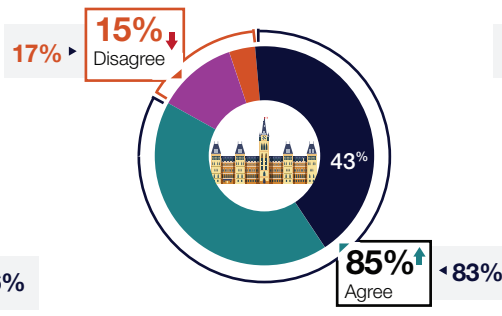
Canadians continue to view healthcare providers, government agencies and financial institutions as the most trustworthy to keep personal information safe.

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

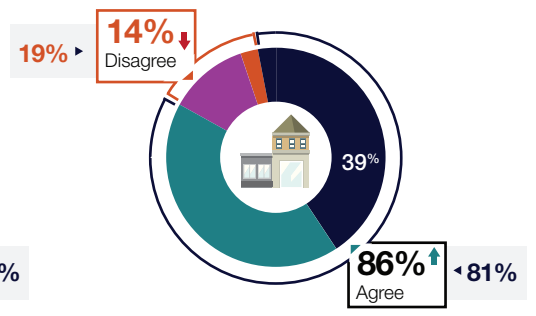
Healthcare Providers



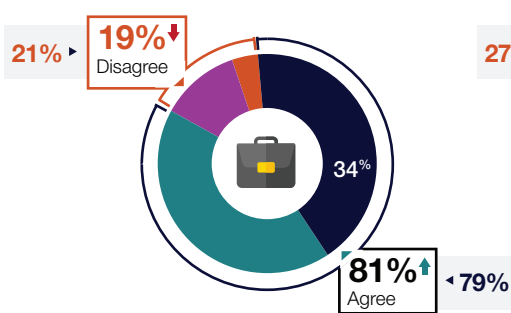
Government Agencies



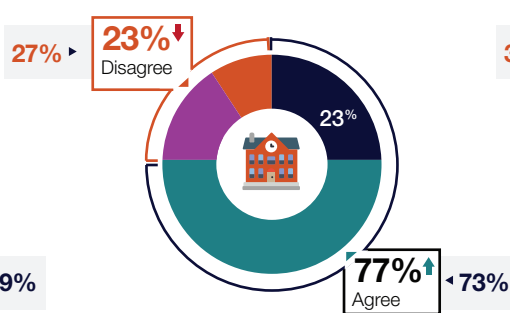
Financial Institutions



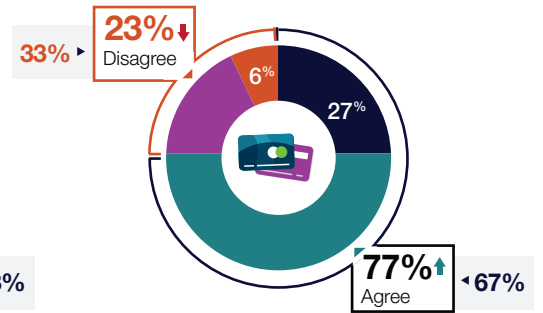
Professionals



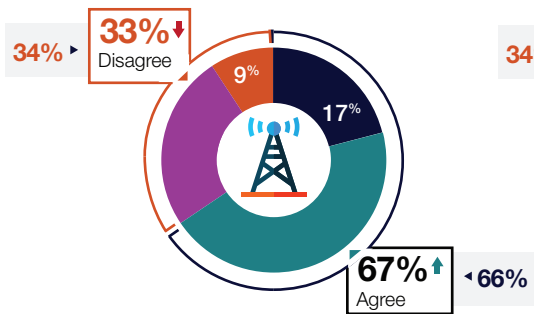
Academic Organizations



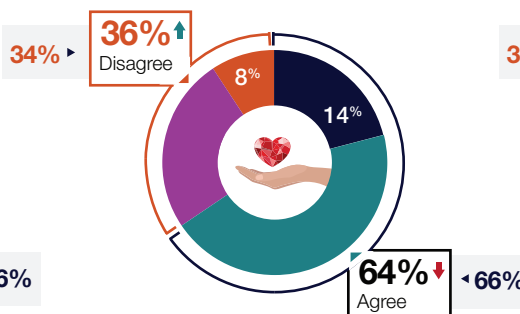
Credit Card Companies



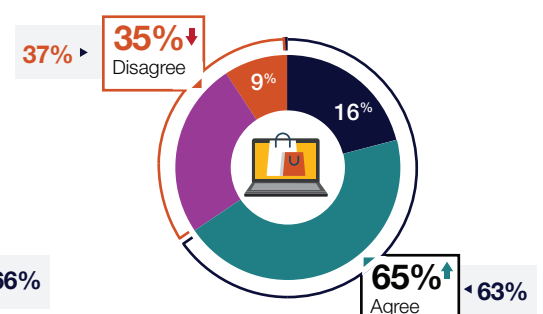
Telecom Companies



Loyalty Programs



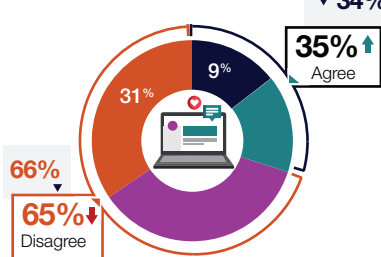
Ecommerce Companies



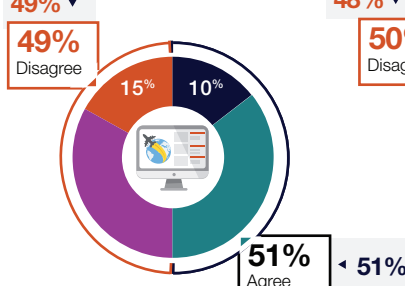
● Strongly agree ● Somewhat agree ● Somewhat disagree ● Strongly disagree 2019 Responses

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

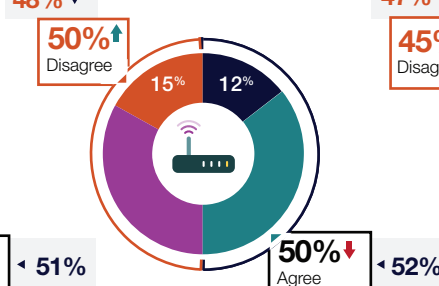
Social Media Sites



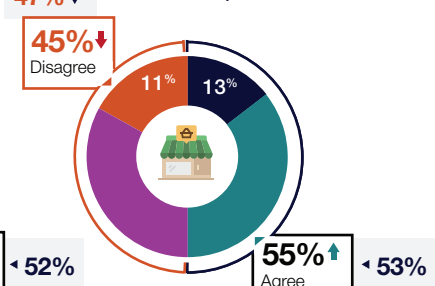
Travel Sites



Internet Providers

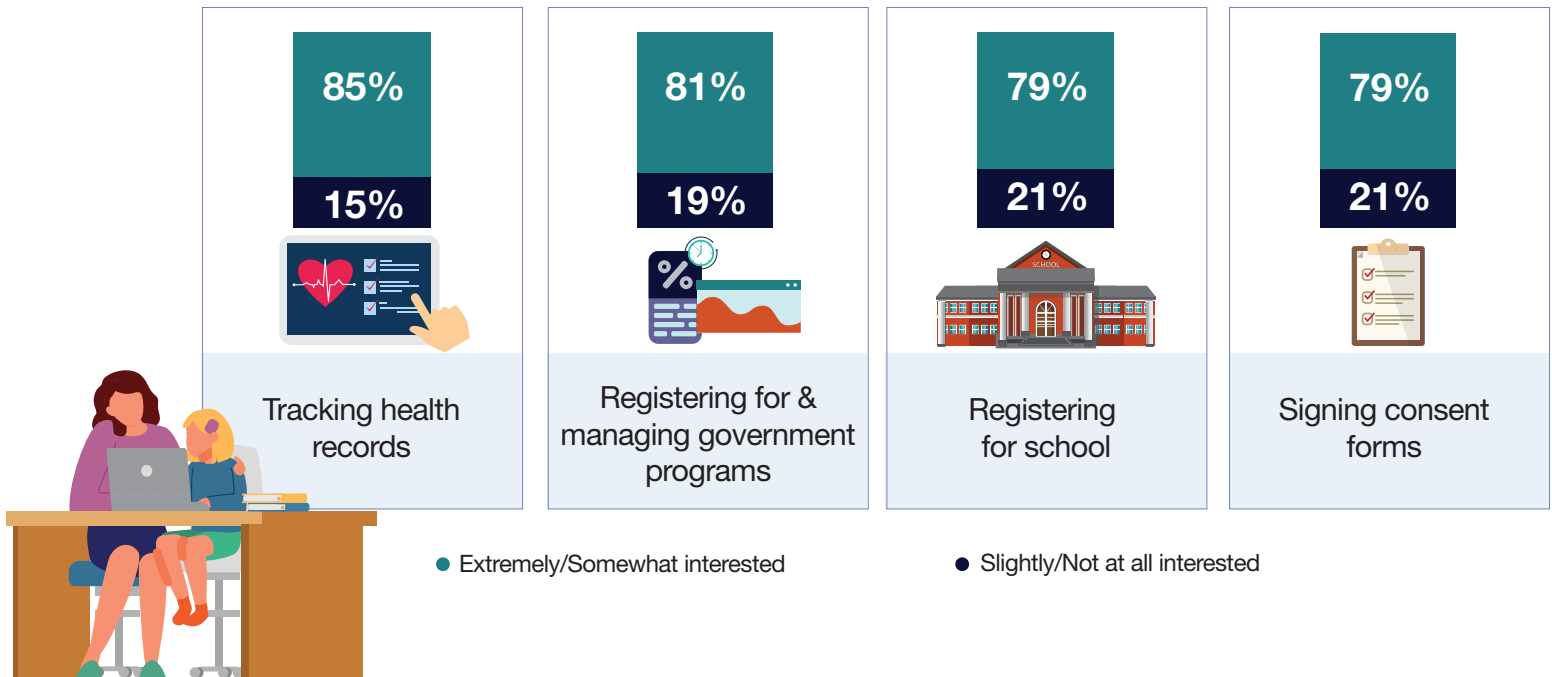


Retail Companies

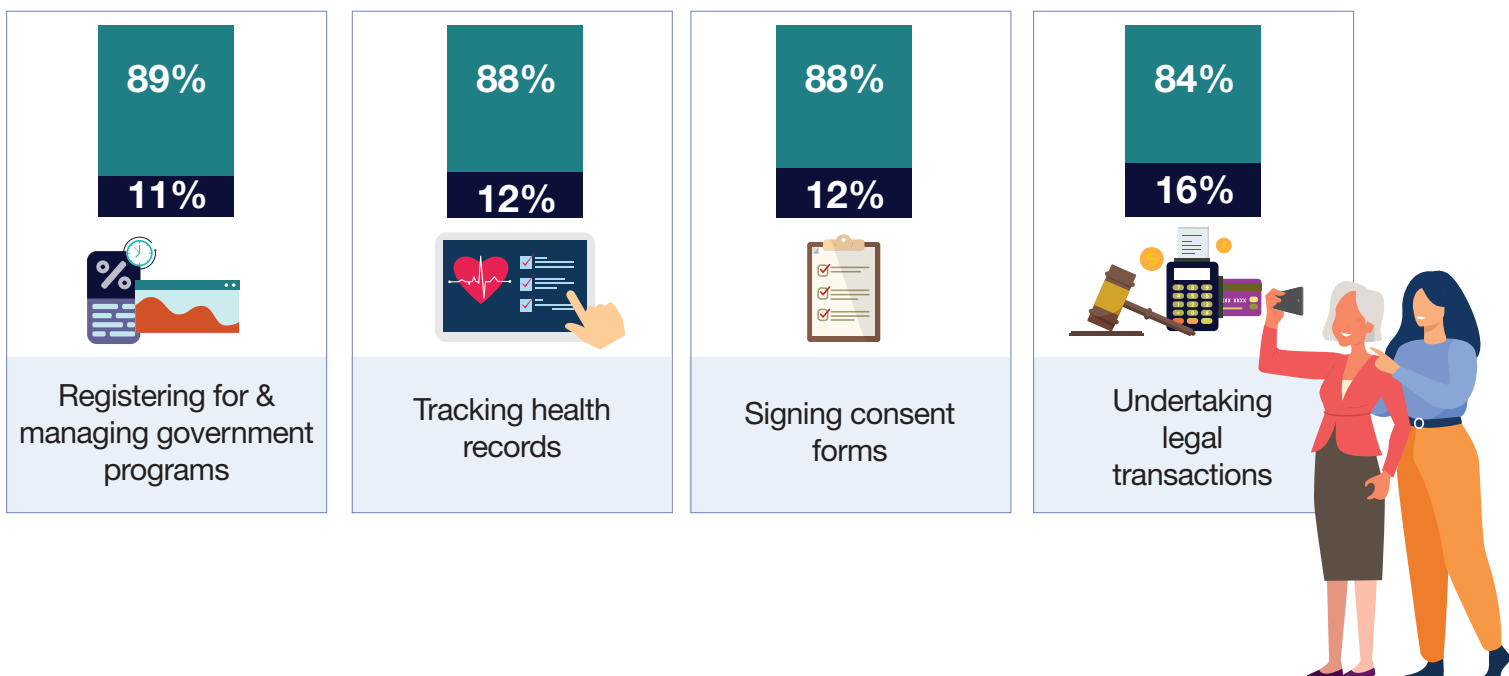


Parents and caregivers see digital ID as an important tool to help them manage the demands of caring for children and ageing parents.

From tracking children's health records and registering for government benefits, to signing consent forms, caregivers recognize the need for digital ID to help them support both their children and their parents.

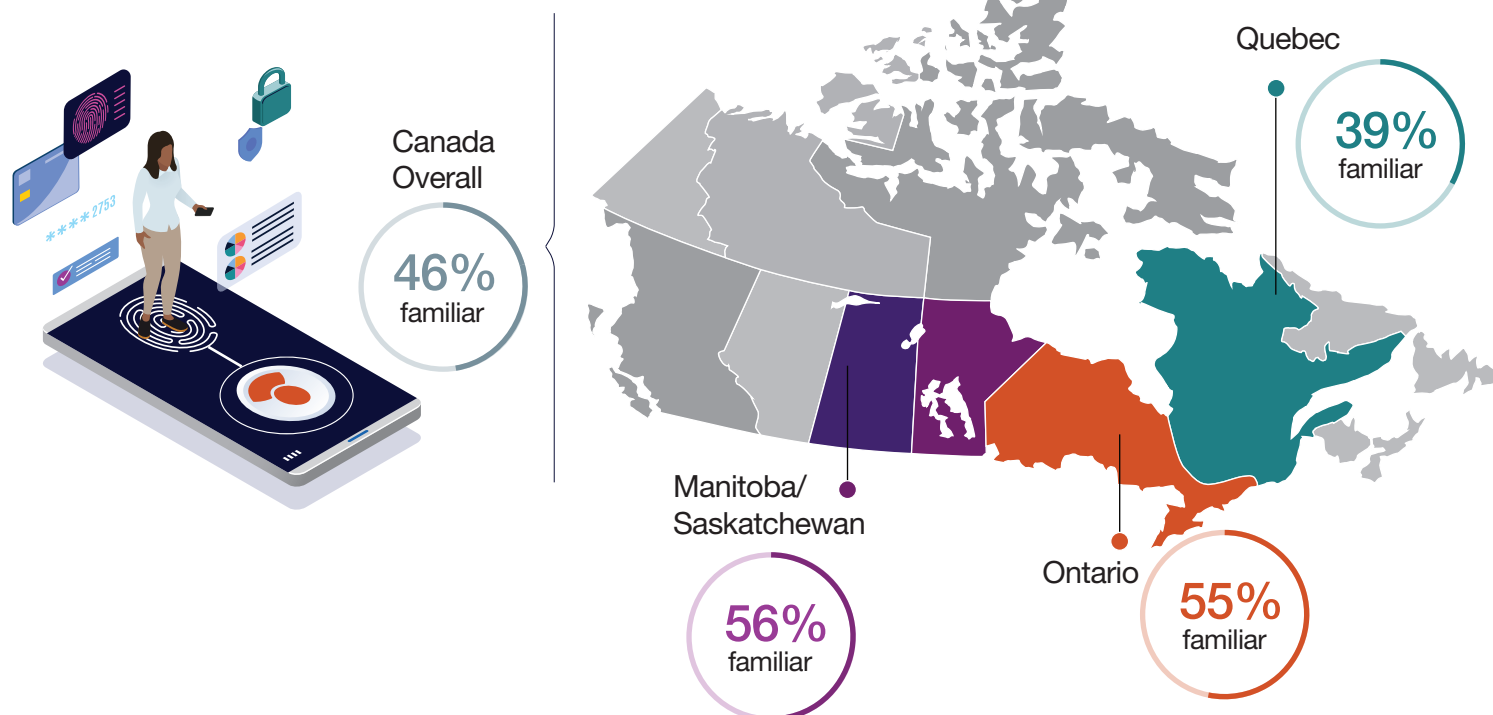


With an increasing number of Canadians caring for ageing parents, there is significant demand for digital ID to support seniors and their families in accessing critical services.

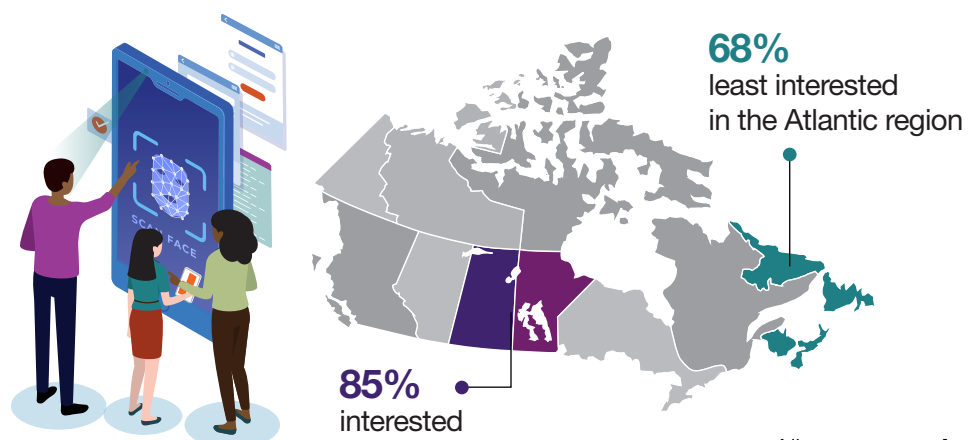


Key Regional Insights

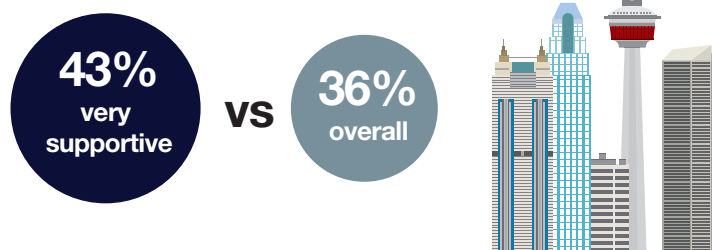
When it comes to “Digital identity”, Ontario and Manitoba/ Saskatchewan have the highest level of familiarity with the concept.



Those residing in Manitoba and Saskatchewan show **the highest level of interest in learning more about digital ID**

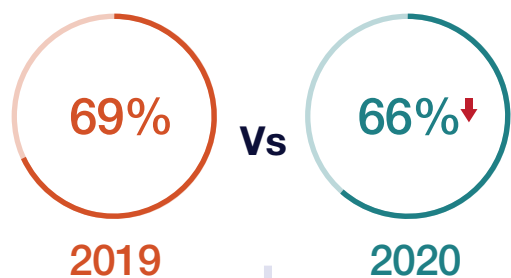


Albertans are **the most supportive of the digital ID concept** after reading a description of how digital ID would facilitate the redistribution of personal support to those who need it most.

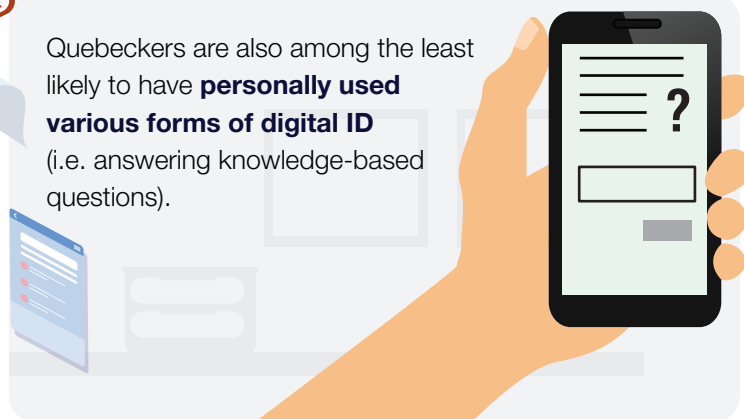


Key Findings for Regions: Quebec

Quebeckers continues to be the least concerned when it comes their personal information being compromised online.



Quebeckers are also among the least likely to have **personally used various forms of digital ID** (i.e. answering knowledge-based questions).



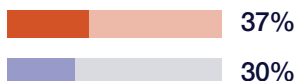
Quebec residents are **more likely to consider it “very important”** that their provincial government move quickly on digital ID.



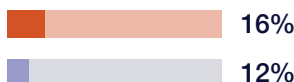
Differences by key subgroups

Self-assessed as disabled

More concerned about their personal information being compromised online



More likely to consider “saves money” as a benefit of digital ID



● Self-assessed as disabled ● Overall

Sandwich generation

Individuals caring for both a dependent child and an ageing parent or family member.

More likely to strongly agree that they are willing to share more personal info online; if it makes their online experience more convenient



More concerned about their personal information being compromised online



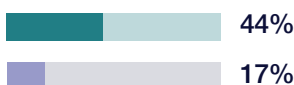
More familiar with the concept of digital ID



Higher interest in learning more about digital ID



More likely to think private companies alone should create a pan-Canadian digital ID framework



More supportive of the digital ID concept after reading a description of how digital ID would facilitate the redistribution of personal support to those who need it most



They are more likely to consider it “very important” that their provincial government (51%) and the federal government move quickly on digital ID.



● Sandwich generation ● Overall (P) Provincial (F) Federal

Caretakers for seniors

More likely to strongly agree that they are willing to share more personal info online; if it makes their online experience more convenient



More concerned about their personal information being compromised online



More familiar with the concept of digital ID



More likely to consider “saves money” as a benefit of digital ID



Higher interest in learning more about digital ID



More likely to think private companies alone should create a pan-Canadian digital ID framework



More supportive of the digital ID concept after reading a description of how digital ID would facilitate the redistribution of personal support to those who need it most



They are more likely to consider it “very important” that their provincial government (51%) and the federal government move quickly on digital ID.



● Caretakers for seniors ● Overall (P) Provincial (F) Federal

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Survey results reflect a sampling of 1000 Canadians across all regions over a two week period. The 2020 Canadian Digital Identity Research was undertaken by Burak Jacobson Research Partners, a full-service market research consulting firm headquartered in Toronto, Ontario. Founded in 1981, Burak Jacobson has conducted over 4,000 research projects in 39 countries across a variety of industries.