

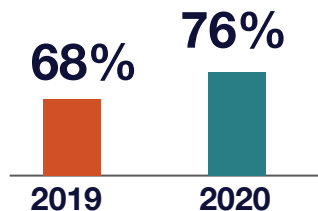


Canadian Digital Identity Research 2020

February 2021

Executive Summary

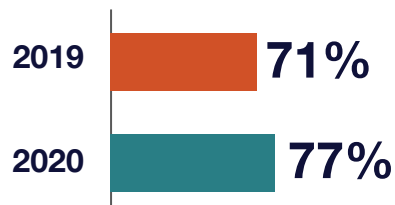
The proportion of Canadians who are willing to share personal information if it makes their online experience more convenient **increased significantly in 2020**



meanwhile, concerns about personal information being compromised online declined directionally in 2020.

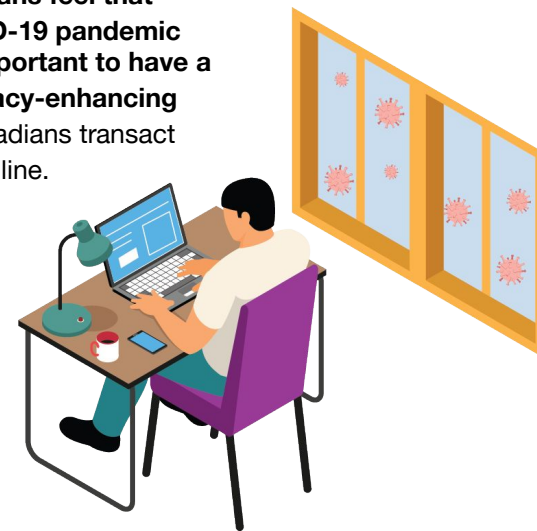


Interest in learning more about digital ID **increased significantly in 2020** with just over three-quarters saying they're very/somewhat interested.



A strong majority

75% of Canadians feel that the COVID-19 pandemic has made it more important to have a secure, trusted, privacy-enhancing digital ID to help Canadians transact safely and securely online.



An isometric illustration of a man and a woman sitting at a round wooden table, working on a laptop. The woman is on the left, wearing a blue long-sleeved shirt, and the man is on the right, wearing an orange t-shirt. On the table are two white coffee cups on saucers, a blue smartphone, and a yellow notepad. Surrounding them are various floating icons: a large teal padlock, a green checkmark in a circle, a large orange circle with a white silhouette of a person, a blue document with a checkmark, a document with a bar chart, a document with a pie chart, a document with a network diagram, a purple folder, and several yellow circles.

9-out-of-10 Canadians



88% are very/somewhat supportive of the concept of digital ID

after reading a description of how digital ID would allow many to authenticate themselves, thus redistributing personal support to those who need it most.

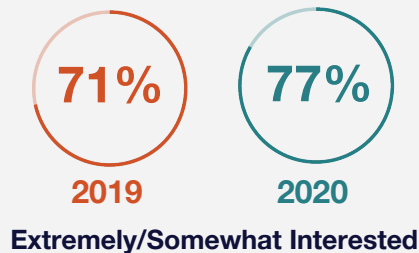
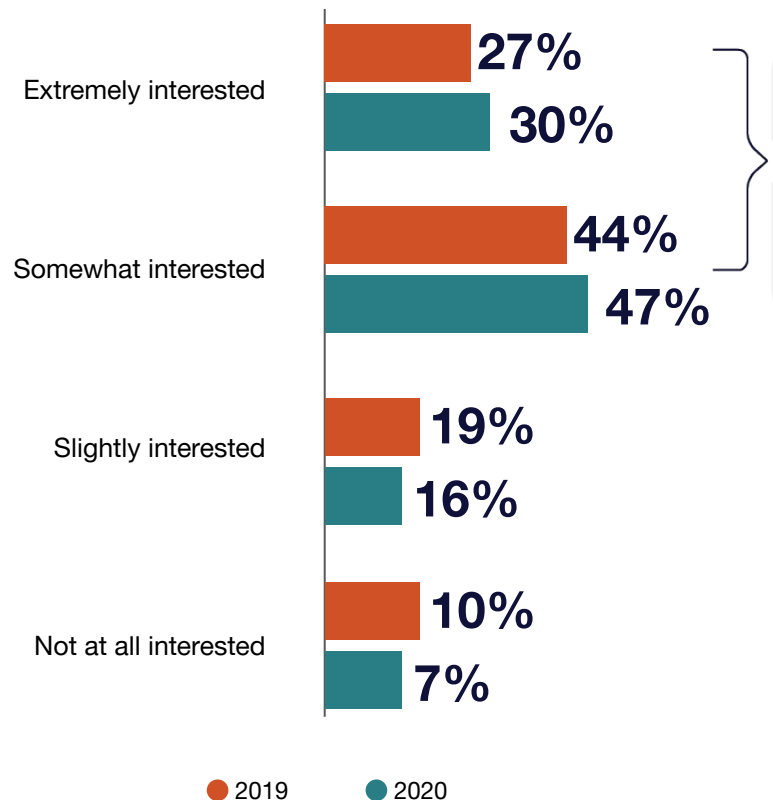
Parents demonstrate moderate-to-strong interest in leveraging a digital ID to help manage tasks related to their child(ren), i.e. tracking health records, school/government registrations, etc; the same is true of caretakers for seniors.



believe it is very/somewhat important that the federal government move quickly to enable a safe & secure digital ID for all Canadians; the same proportion (82%) said the same of their provincial government.



The proportion of Canadians interested in learning more about the benefits and capabilities of “digital identity” has significantly increased since 2019.



Higher among...	
Sandwich generation	90%
Senior caregiver	89%
\$100k+ HH income	86%
18-34	82%
Soccer parent	82%
Males	80%

Among those extremely concerned with info being compromised, 41% are extremely interested



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.



9
out of
10

88%

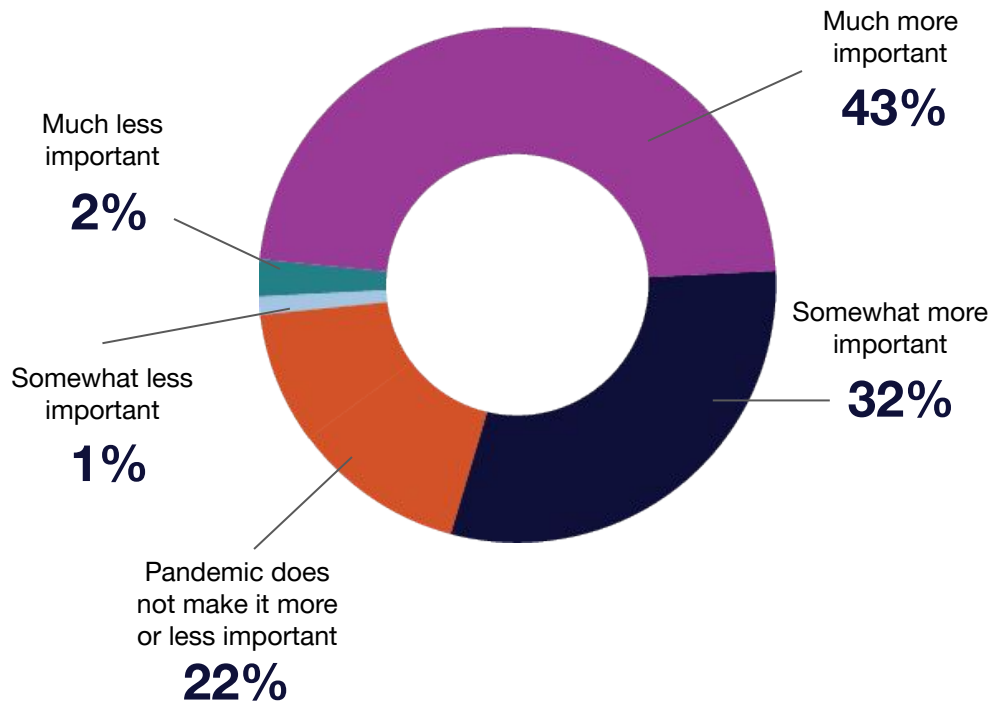
Very/Somewhat Supportive

Higher “very supportive” among...

55+	41%
Soccer parent	41%
Senior caregiver	47%
Sandwich generation	54%

Among those extremely
concerned about their info being
compromised,
46% are Very Supportive

Three-quarters of Canadians believe COVID-19 has made having a digital ID more important; only a small minority felt COVID-19 made it less important.

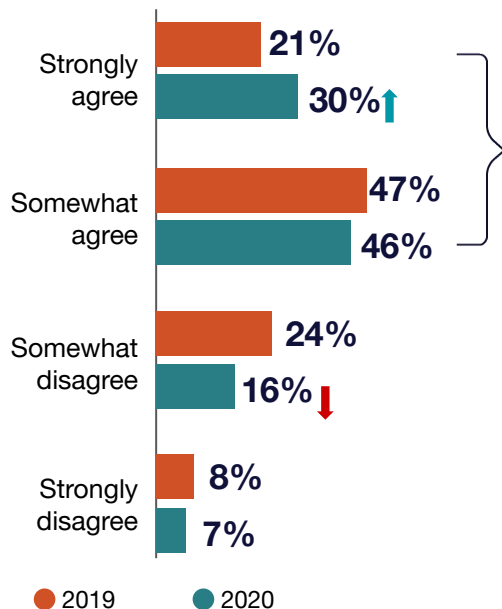


Greater importance among...

Soccer parent	80%
Sandwich generation	82%

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

How strongly do you agree or disagree with the statement:
I am willing to share more of my personal information online if it makes my experience online more convenient.



Agree Strongly/Somewhat

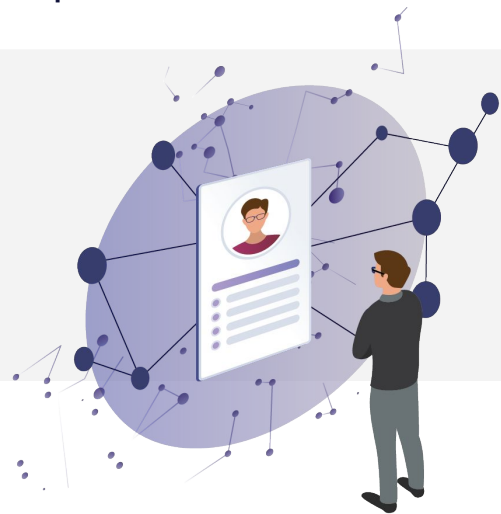
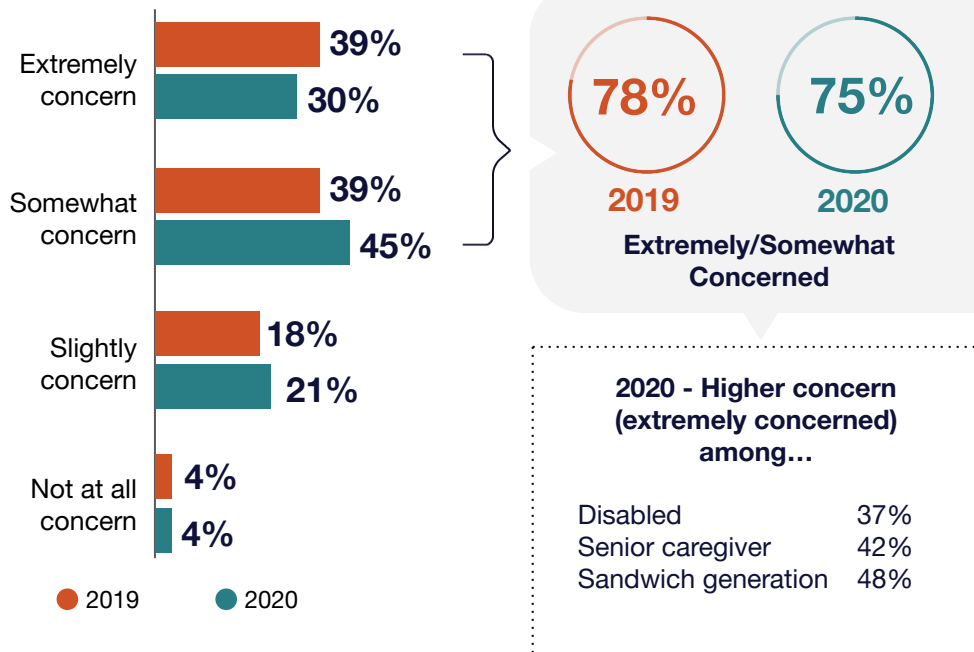
2020 - Greater willingness
(strongly agree) among...

Males	35%
18-34	38%
Soccer parent	36%
Senior caregiver	42%
Sandwich generation	56%



Canadians are more willing to share personal info online relative to 2019; they are also a bit less concerned about their information being compromised (shift from extremely to somewhat/slightly).

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

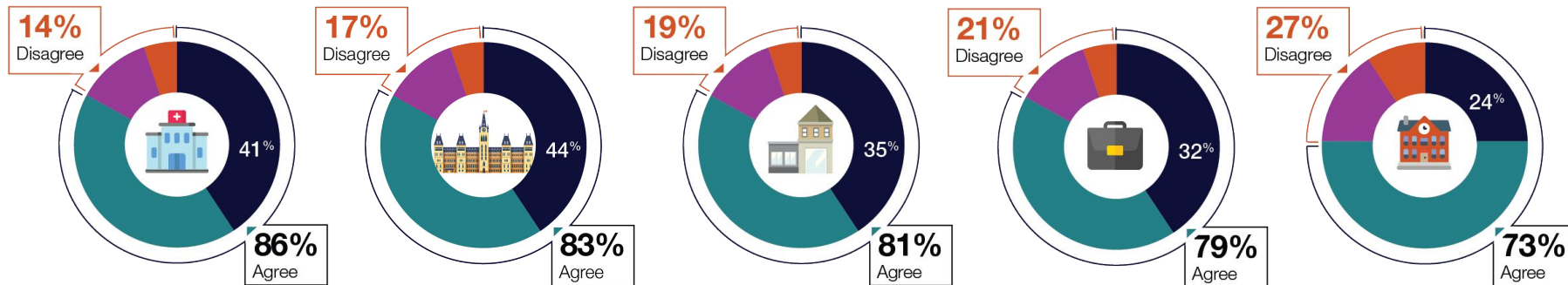


Healthcare providers, government agencies and FIs continue to be viewed as the most trustworthy to keep personal information safe.

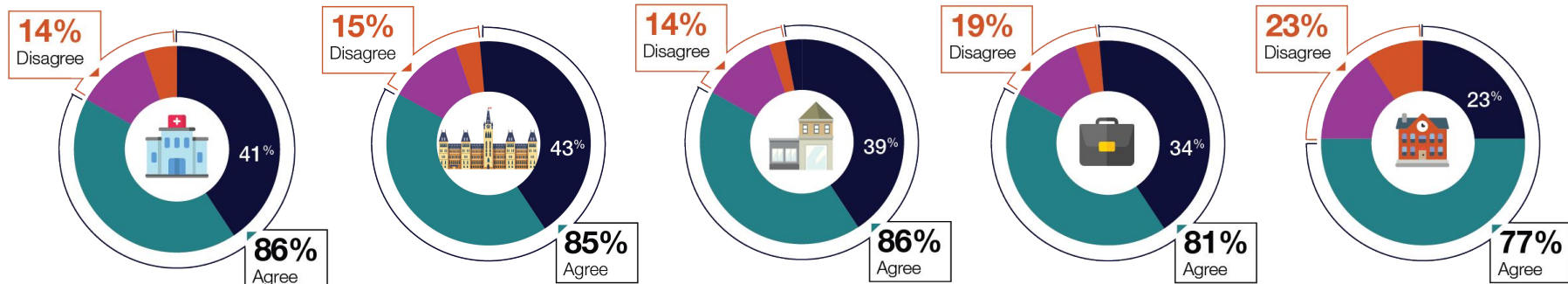
How strongly do you agree or disagree... that you trust each of the following to keep your personal information safe and secure?

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

2019



2020



Healthcare Providers

Government Agencies

Financial Institutions

Professionals

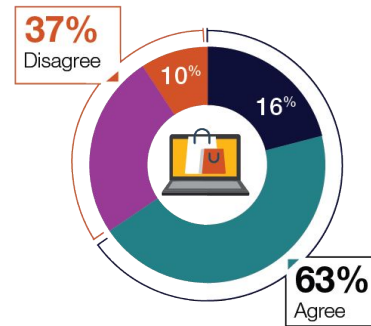
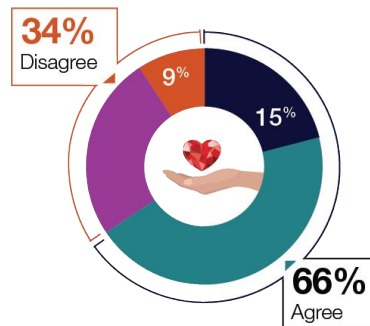
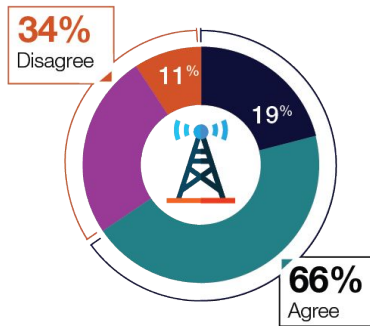
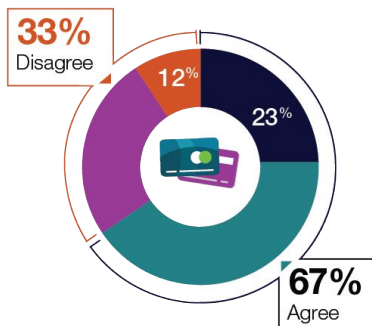
Academic Organizations

Interestingly, trust in credit card companies improved.

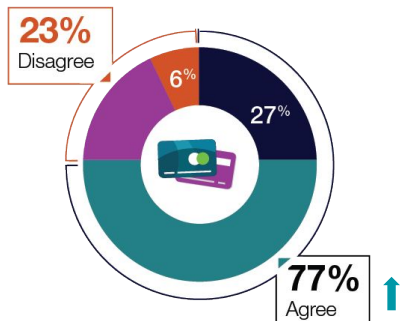
How strongly do you agree or disagree... that you trust each of the following to keep your personal information safe and secure?

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

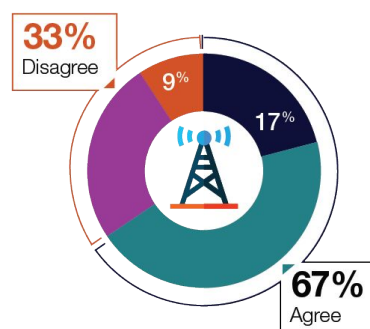
2019



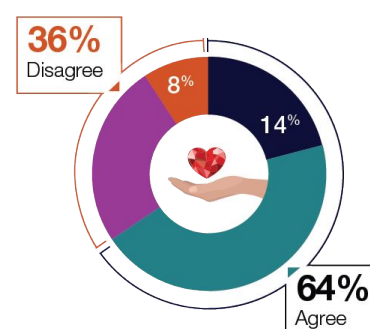
2020



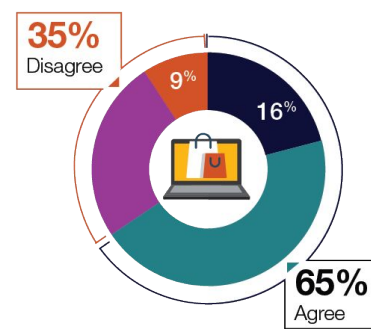
Credit Card
Companies



Telecom
Companies



Loyalty
Programs



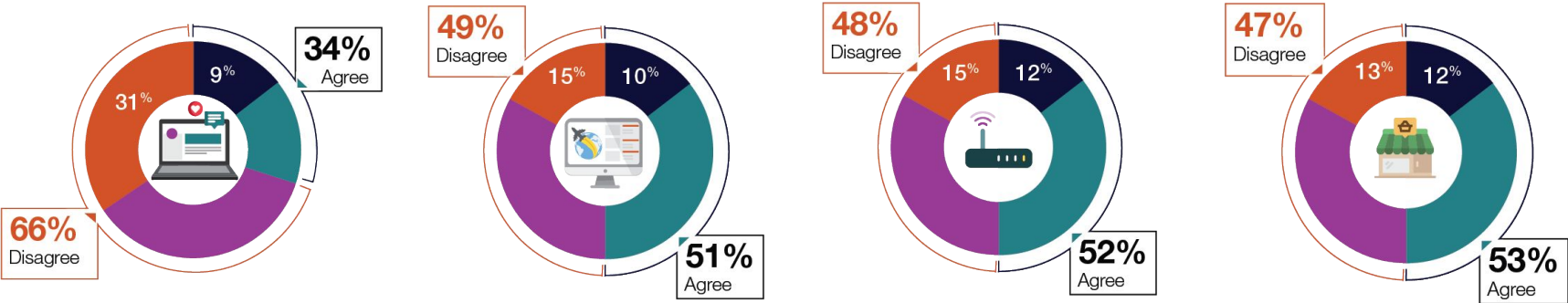
Ecommerce
Companies

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

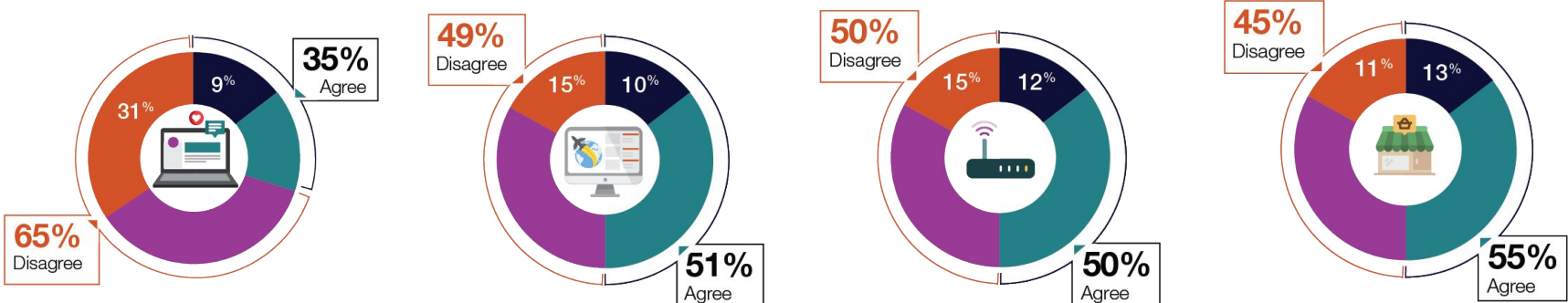
How strongly do you agree or disagree... that you trust each of the following to keep your personal information safe and secure?

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

2019



2020



Social Media Sites

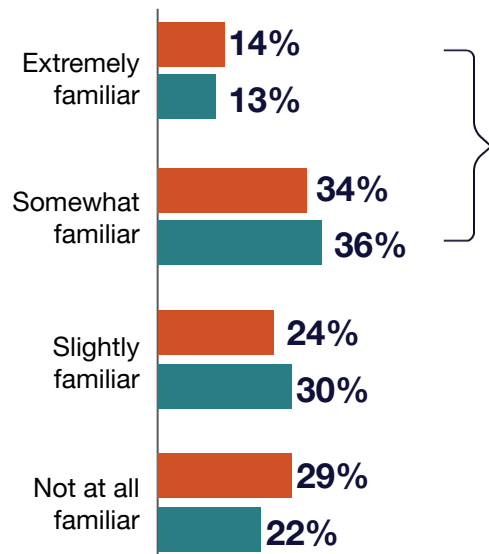
Travel Sites

Internet Providers

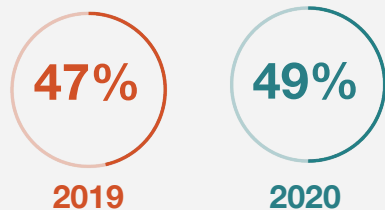
Retail Companies

Similar to 2019, 1 out of 2 Canadians continue to be familiar with the concept of “digital identity”. Familiarity with and use of biometrics increased since 2019.

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



● 2019 ● 2020



Extremely/Somewhat Familiar

2020 Greater familiarity among...

Males	55%
18-34	71%
\$100k+ HH income	62%
Soccer parent	57%
Senior caregiver	61%
Sandwich gen	72%

Familiarity higher in...

Ontario (55%) and
Manitoba/Saskatchewan (56%)
lowest in Quebec (38%)



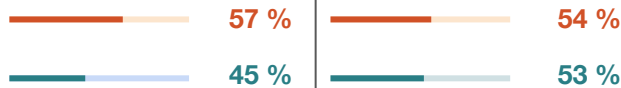
Similar to 2019, 1 out of 2 Canadians continue to be familiar with the concept of “digital identity”. Familiarity with and use of biometrics increased since 2019.



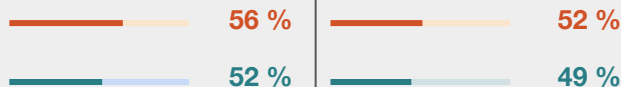
Which of the following...



Online passwords



Answering knowledge-based questions digitally



Logging into social media accounts



Biometrics



None of the above



2019

2020



Reducing fraud and being an easy way to verify one's identity continue to be seen as the main benefits of “digital identity”. There were no significant shifts in perceived benefits year-to-year.

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

45% 46%



Reduce the risk of fraud



45% 45%



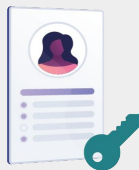
It's an easy way to verify my identity compared to other methods



41% 38%



Increase my privacy



39% 40%



Reduced the risk of data breaches



37% 40%



Is more convenient



33% 36%



Is more efficient



18% 16%



Gives me access to more/better products & services



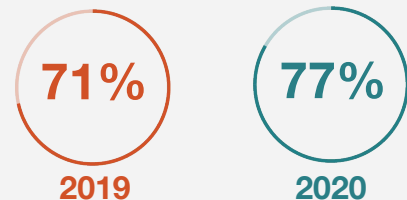
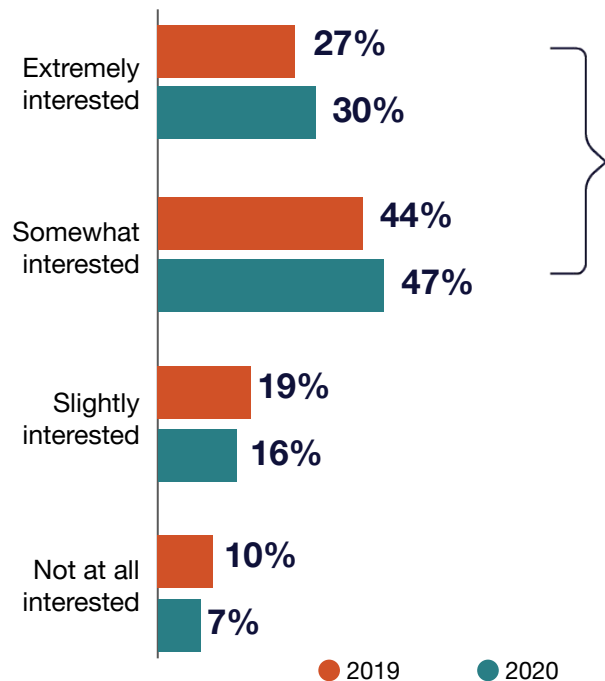
12% 10%



Saves money



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

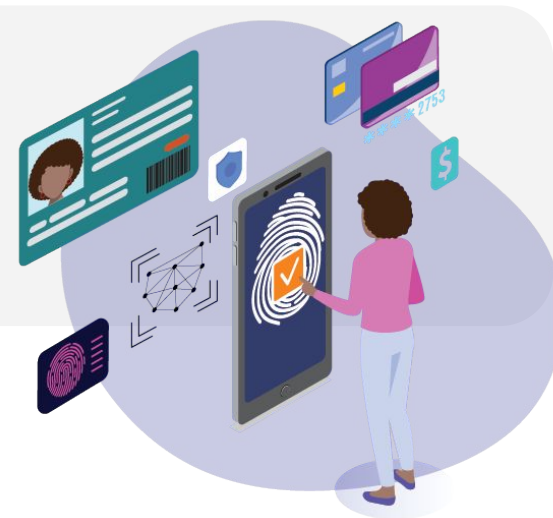


Extremely/Somewhat interested

Higher among...

Males	80%
18-34	82%
\$100k+ HH income	86%
Soccer parent	82%
Senior caregiver	89%
Sandwich gen	90%

Among those extremely concerned with info being Compromised, 41% are extremely interested



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.

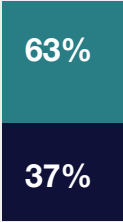
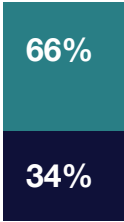
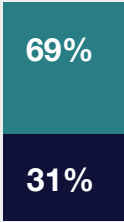
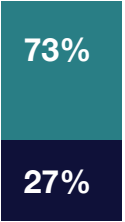
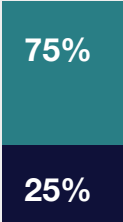
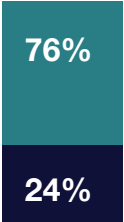
While digital ID can help to prevent fraud and increase privacy; it's also about asserting who we are in this society. People are interacting more and more online making it necessary for businesses and government to adapt and ensure people claim who they are in the digital economy.

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

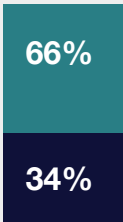
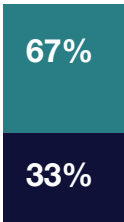
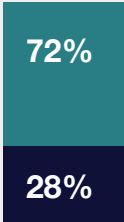
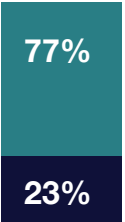
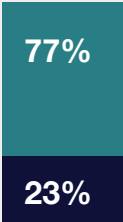
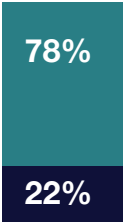
How interested are you in verifying your online identity through digital ID authentication with these organizations?

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

2019



2020



Government Agencies



Financial Institutions



Healthcare Providers



Credit card Companies



Telecom Companies

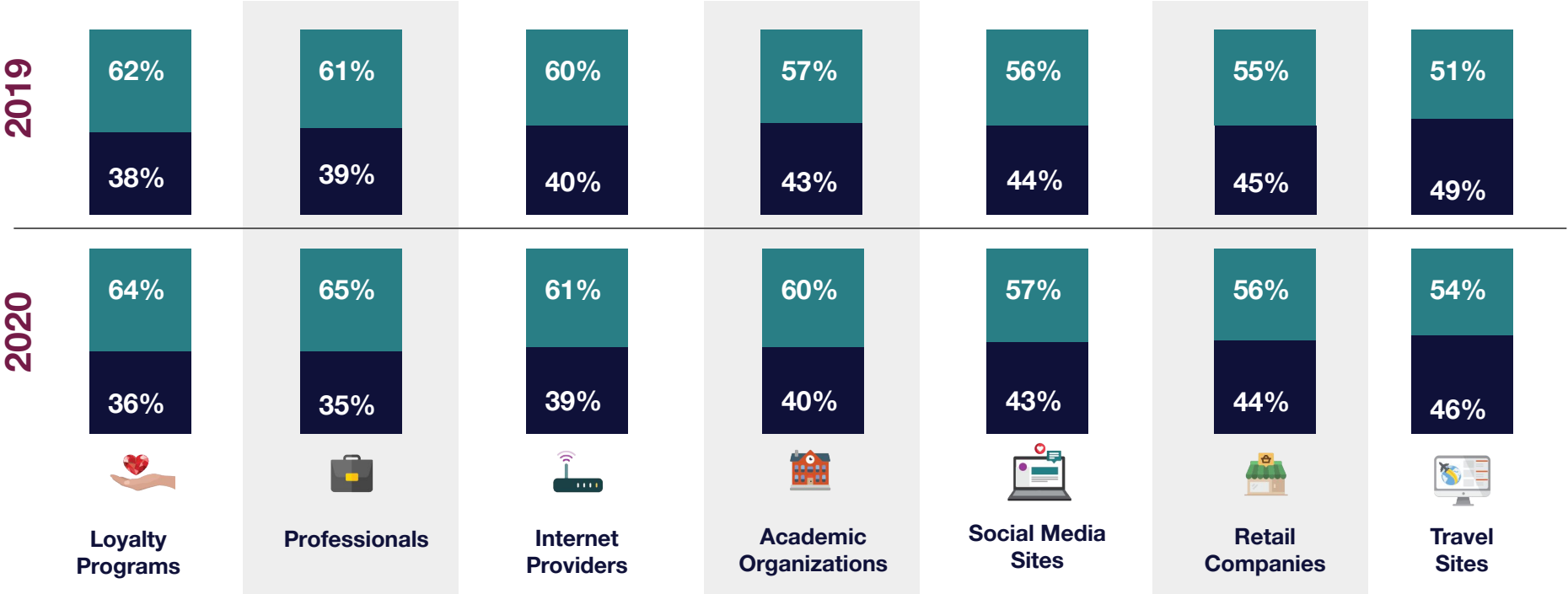


Ecommerce Companies

Interest in using digital ID authentication continues to be lower for travel sites and retail companies.

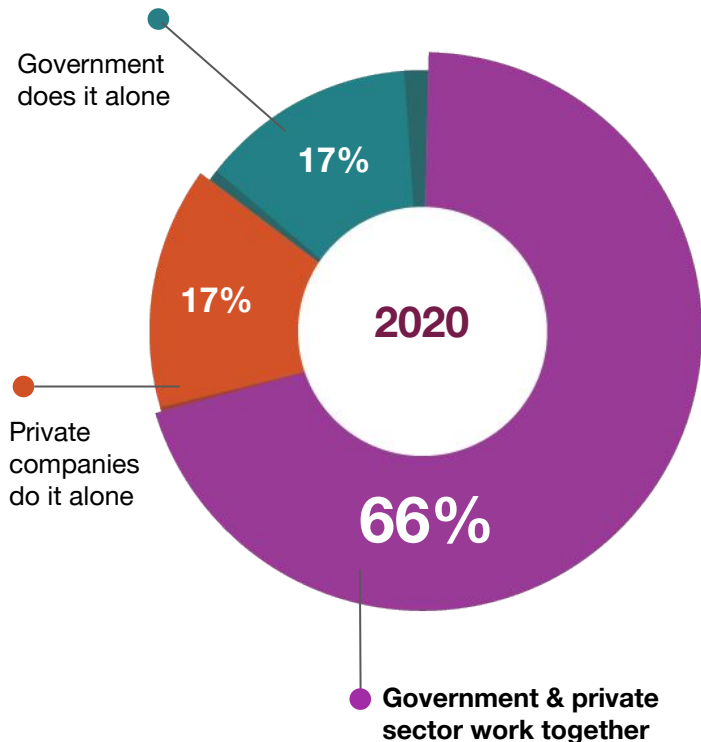
How interested are you in verifying your online identity through digital ID authentication with these organizations?

Extremely/Somewhat interested Slightly/Not at all interested



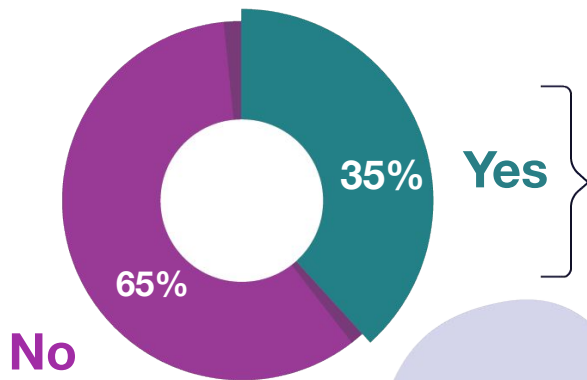
A collaboration between government and the private sector continues to be considered the best approach to create a pan-Canadian digital ID framework.

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



Parents/guardians demonstrate moderate-to-strong interest in using a trusted & secure digital identity for a variety of tasks, particularly tracking their child(ren)'s health records.

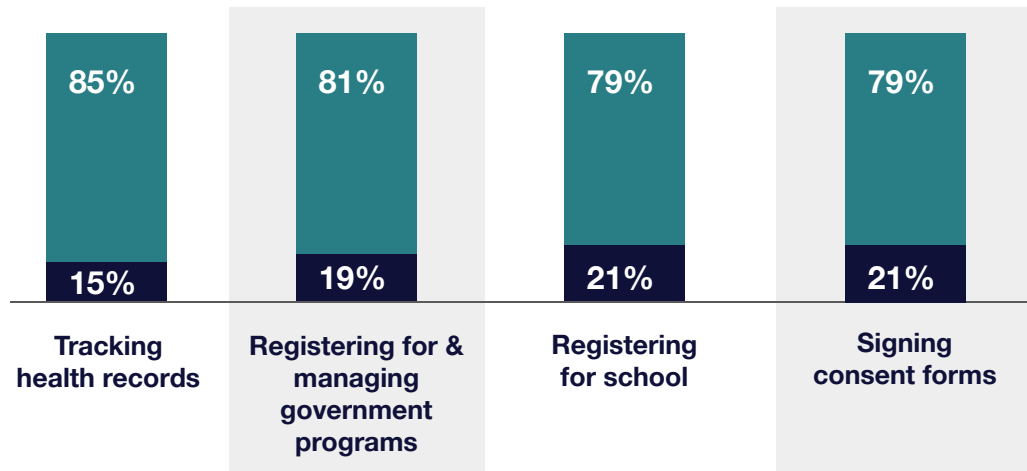
Parent/legal guardian of a child(ren) living in your household?



How interested would you be in leveraging a trusted and secure digital identity to do each of the following for the child(ren) in your household?

● Extremely/Somewhat interested

● Slightly/Not at all interested

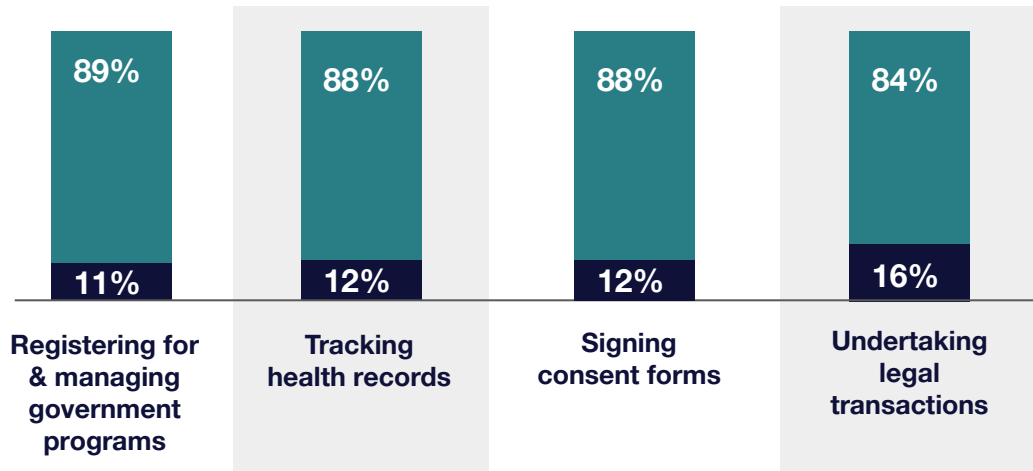


Canadians who are caring for seniors are interested in using a trusted & secure digital identity for a variety of tasks for the senior(s) they are responsible for.

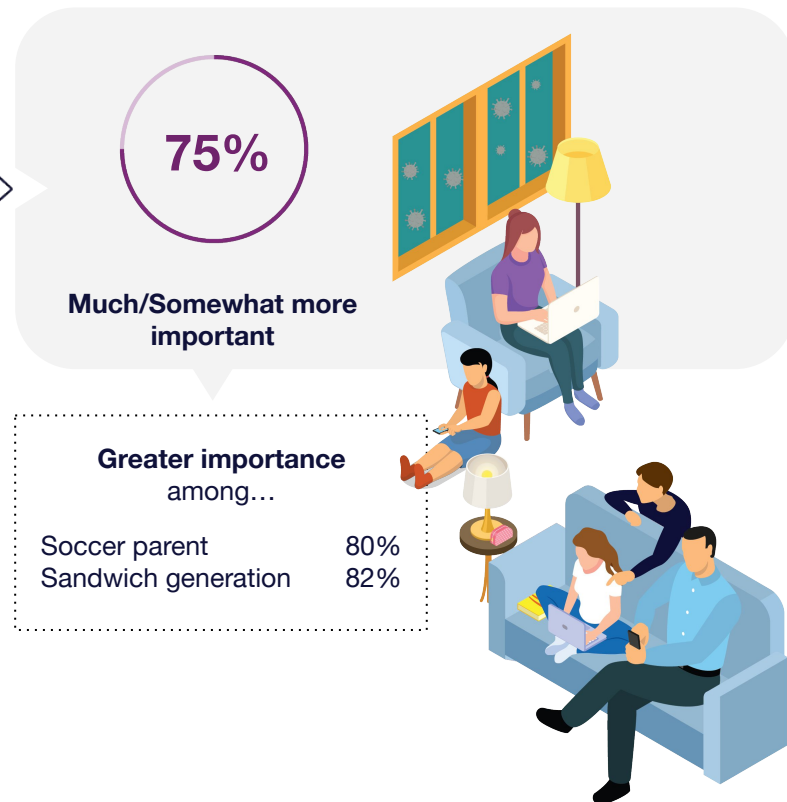
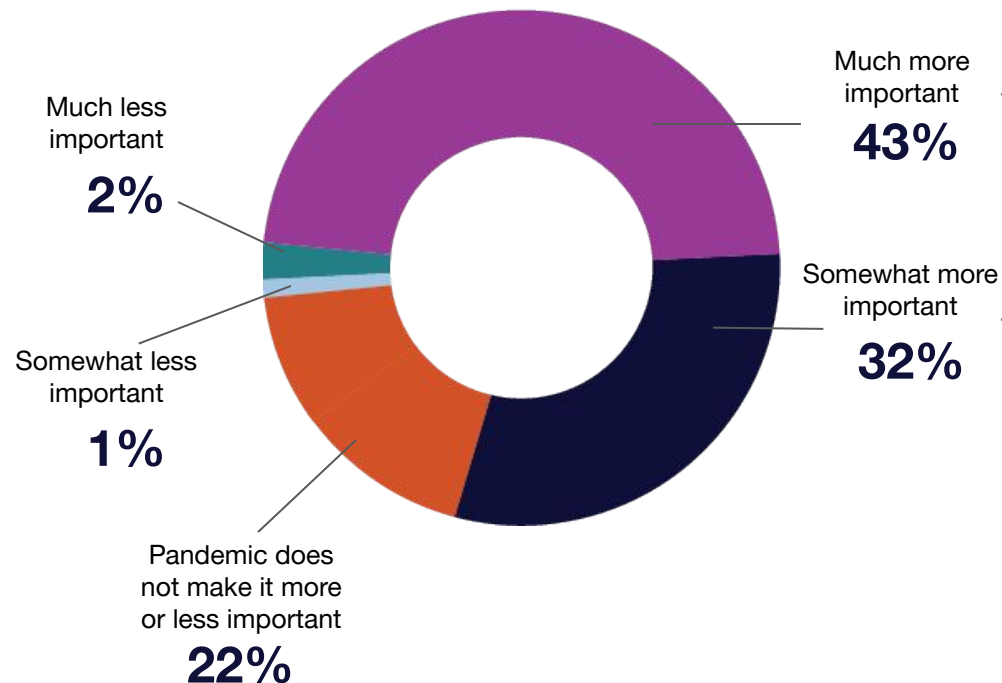
How interested would you be in leveraging a trusted and secure digital identity to do each of the following for the senior(s) you look after?

● Extremely/Somewhat interested

● Slightly/Not at all interested

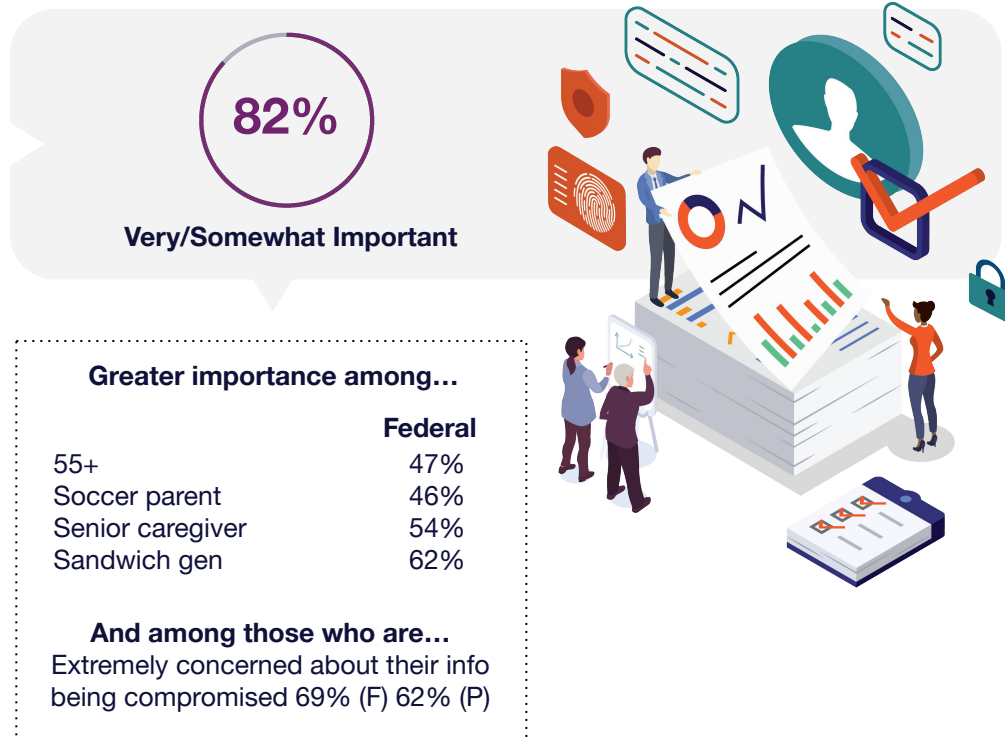
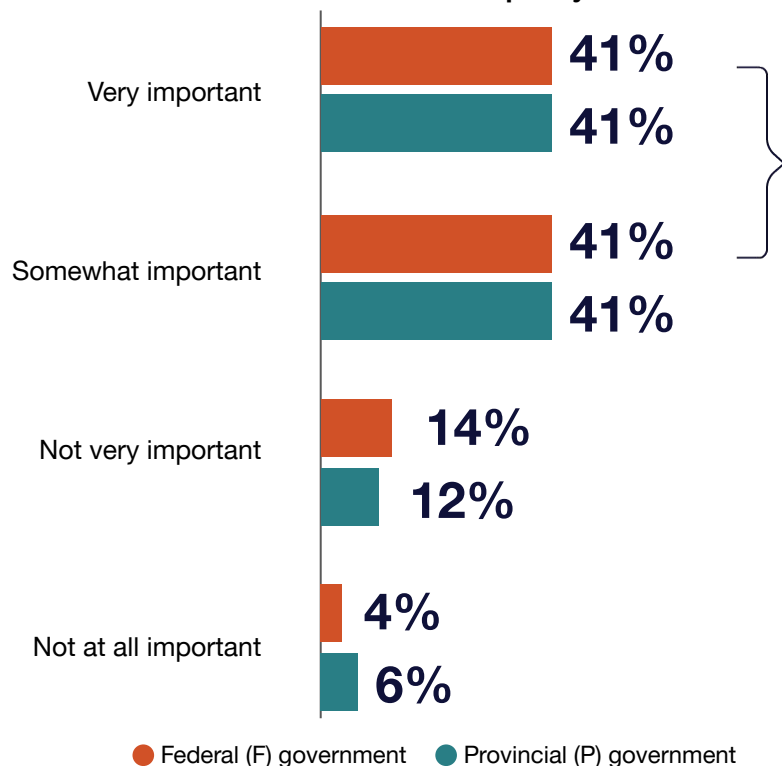


Three-quarters of Canadians believe COVID-19 has made having a digital ID more important.



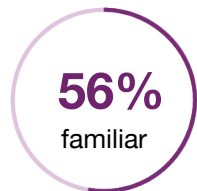
4-in-5 Canadians believe it is important that governments - both federal and provincial - move quickly to enable a trusted & secure digital ID for all

How important is it to you that the Federal government/Provincial/Territorial government move quickly to enable a trusted and secure digital ID for all Canadians?

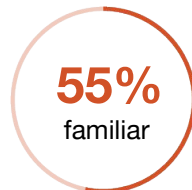


Key Findings For Regions

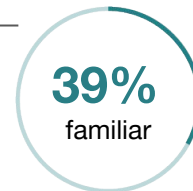
When it comes to “Digital identity”,
Ontario and Manitoba/
Saskatchewan have
**the highest level
of familiarity with
the concept**



**Manitoba/
Saskatchewan**



Ontario

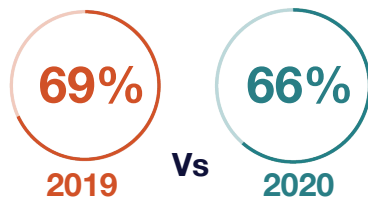


Quebec

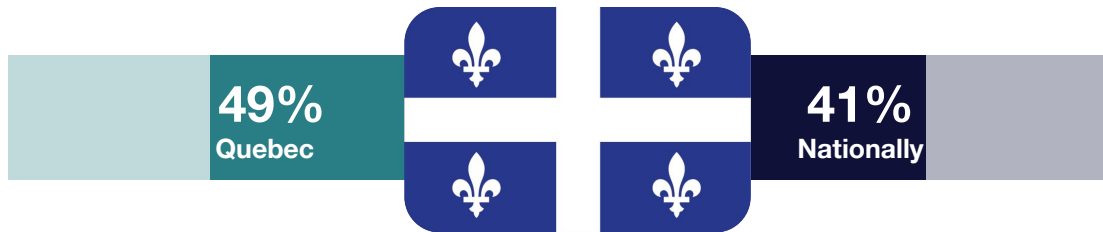


Key Findings For Regions: Quebec

Compared to other regions
Quebec continues to be
the least concerned
when it comes their
personal information
being compromised online

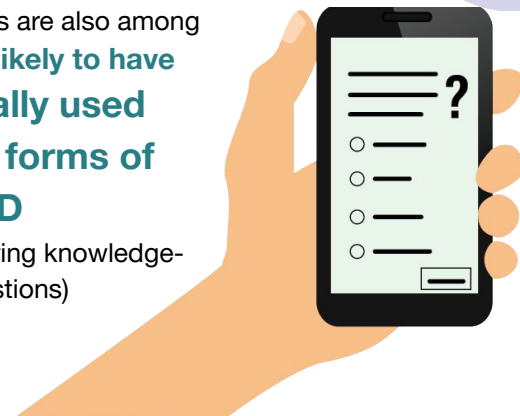


Lastly, Quebec residents are **more likely** to consider it “very important” that their provincial government move quickly on digital ID



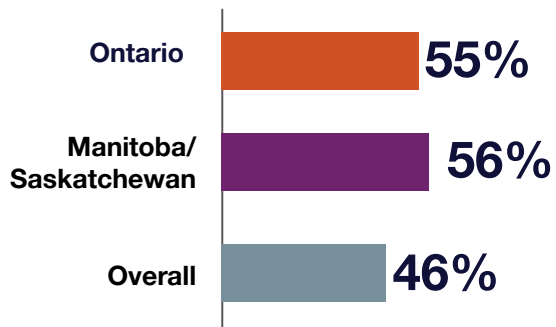
Quebeckers are also among
the least likely to have
personally used
various forms of
digital ID

(i.e. answering knowledge-based questions)

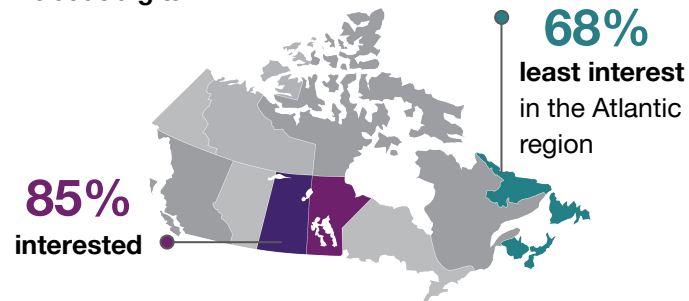


Additional Key Findings For Regions

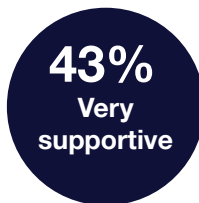
Familiarity with the concept of digital ID is directionally higher in Ontario and Manitoba and Saskatchewan



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

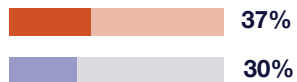


Vs

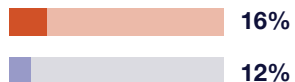


Difference by key subgroups: Self-assessed as disabled

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



Difference by key subgroups: 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



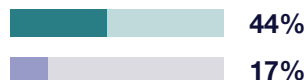
More familiar with the concept of digital ID



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



● Sandwich generation

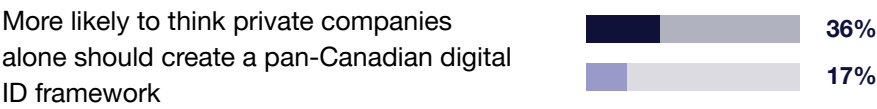
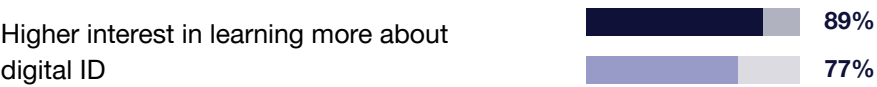
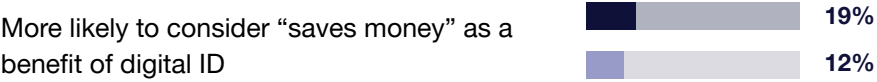
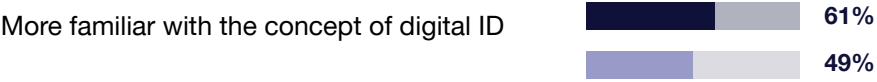
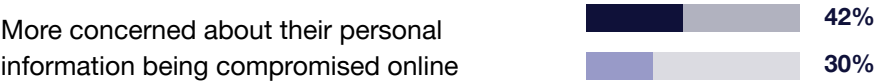
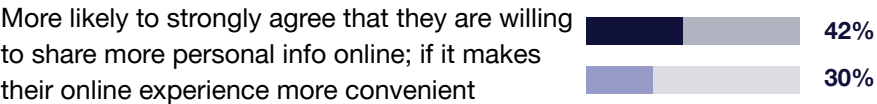
● Overall



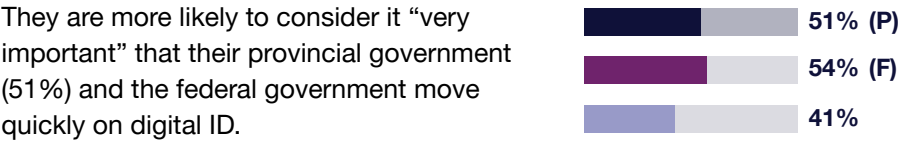
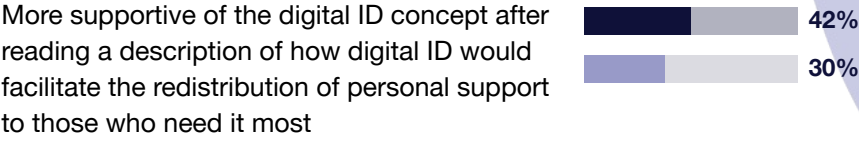
They are more likely to consider it “very important” that their provincial government (51%) and the federal government move quickly on digital ID.



Difference by key subgroups: Caretakers for seniors



● Caretakers for seniors ● Overall



Survey Methodology

They survey was conducted by Burak Jacobson Research Partners from Dec 14 - 31, 2020 with over 1000 Canadians in an online format.

Definitions of the population segments:

(self reported by respondents):

- “Soccer parent” = have kid(s) <18 in the HH and 25+ years old
- Age = <35, 35-54, 55+
- Gender = Male, female
- Region = BC, AB, Sask/MB, ON, QC, Atlantic
- Density = Urban, Rural, Suburban
- Disabled = identify as a person with a disability
- HHI = <\$60k, \$60-<\$100k, \$100k+
- Senior Caregiver = care for and/or manage the affairs of any senior citizen(s)
- Sandwich Generation = have kid(s) <18 in the HH AND care for and/or manage the affairs of any senior citizen(s)
- Concern about personal info being compromised online = Extremely concerned vs. other 3 options

Breakdown of participants by province:

Province	Number
BC	136
Alberta	115
Manitoba and Saskatchewan	68
Ontario	386
Quebec	235
Atlantic provinces	68
Total	1012

Burak Jacobson Research Partners is 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.

Survey Methodology - continued

Screening Questionnaire:

Where is your primary residence?

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland and Labrador
- Northwest Territories
- Nova Scotia
- Nunavut
- Ontario
- Prince Edward Island
- Quebec
- Saskatchewan
- Yukon
- Outside of Canada

If "Outside of Canada" selected survey ends.

Would you like to complete the remainder of the survey in English or French?

- English
- French

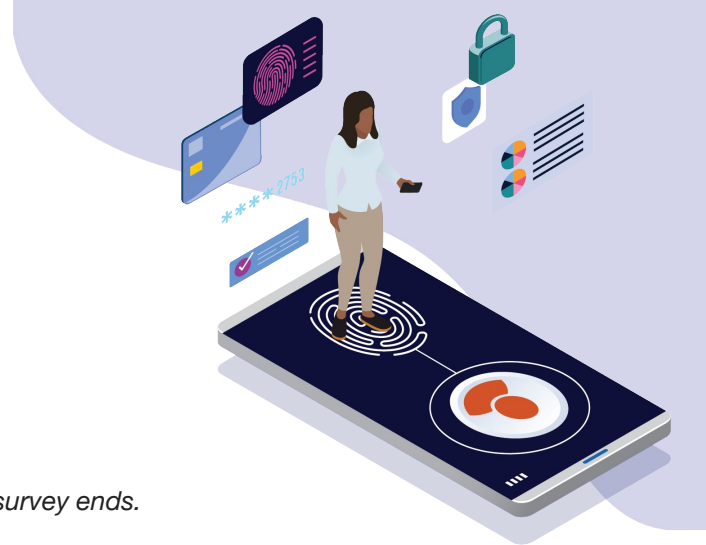
How old are you?

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+

If under age 18 selected the survey ends.

What is your gender?

- Male
- Female
- Other
- Prefer not to answer



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