

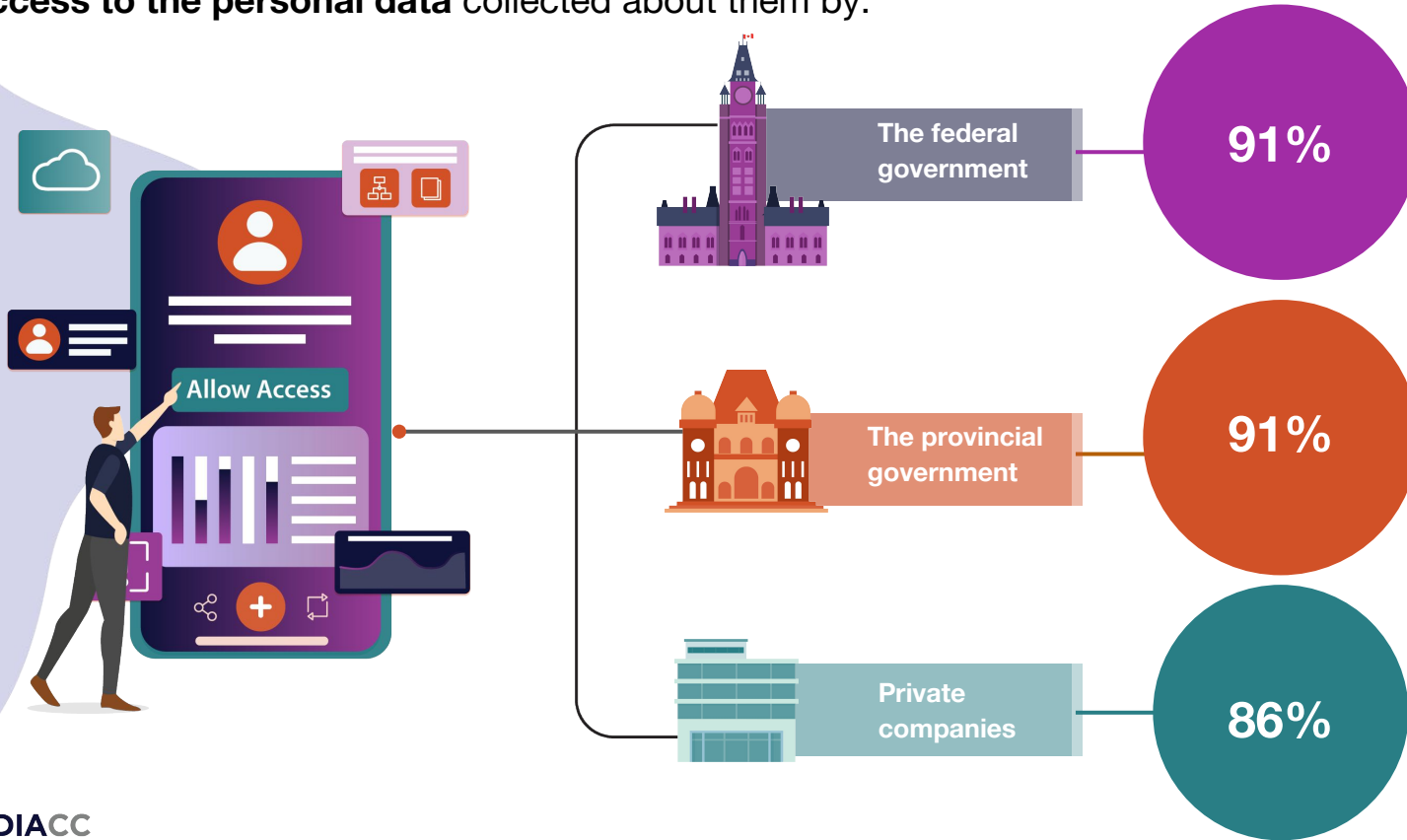


Canadian Digital Identity Research

April 2022

Canadian Perspectives on Digital Identity

A strong majority of Canadians **agree that they should have access to the personal data** collected about them by:



Canadian Perspectives on Digital Identity

~4-in-5 Canadians

(78%) 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 (78%) said the same of their provincial government.



Two-thirds of Canadians

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

Two-thirds of Canadians

(68%) 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.



Canadian Perspectives on Digital Identity



An average of 79% of parents and senior caretakers expressed the most significant interest in leveraging a digital ID to help manage tasks related to those in their care (i.e., tracking health records, registering for school).



Nearly half
Of Canadians
(42%) agree that “vaccine passports issued by the government” fits within their personal definition of “digital identity.”

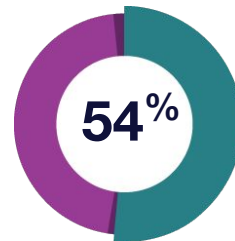
Approximately

8-in-10 Canadians

(82%) 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.



Over half of Canadians



are extremely or somewhat familiar with the concept of a digital wallet.



About 1-in-5 (21%) were completely unfamiliar with the concept.



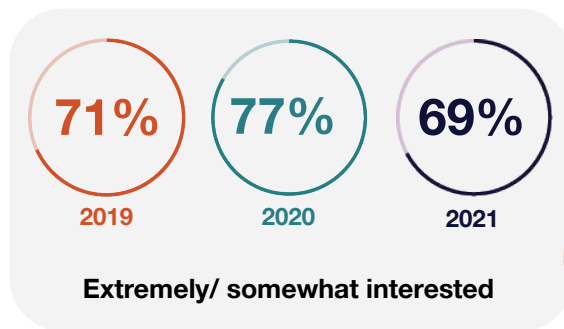
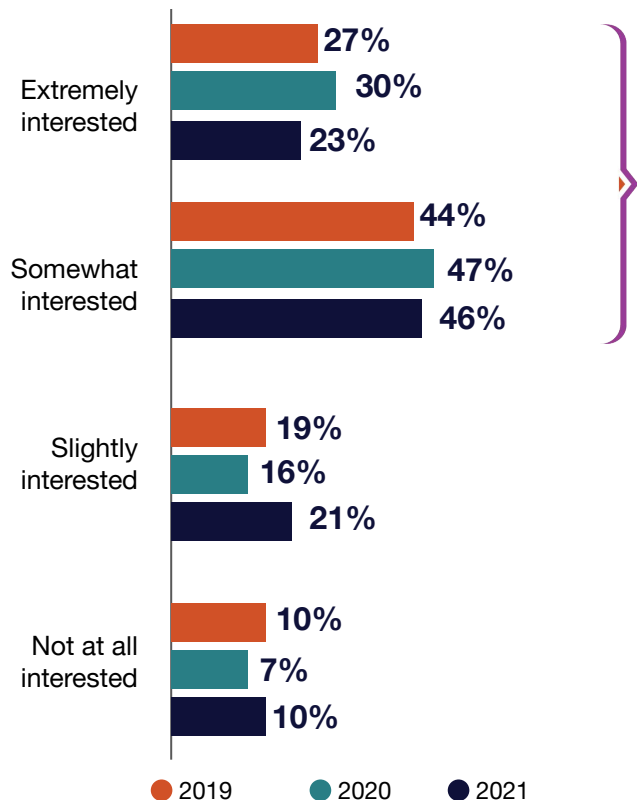
Nearly 4-in-10 (38%) currently use 1+ digital wallet.



Apple Wallet has the highest adoption (17%).

Over two-thirds of Canadians are interested in learning more about the benefits and capabilities of “digital identity.”

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



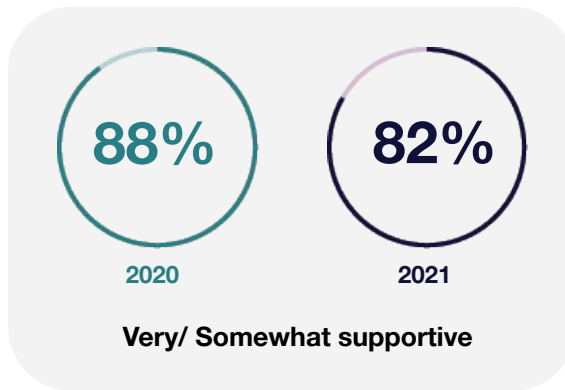
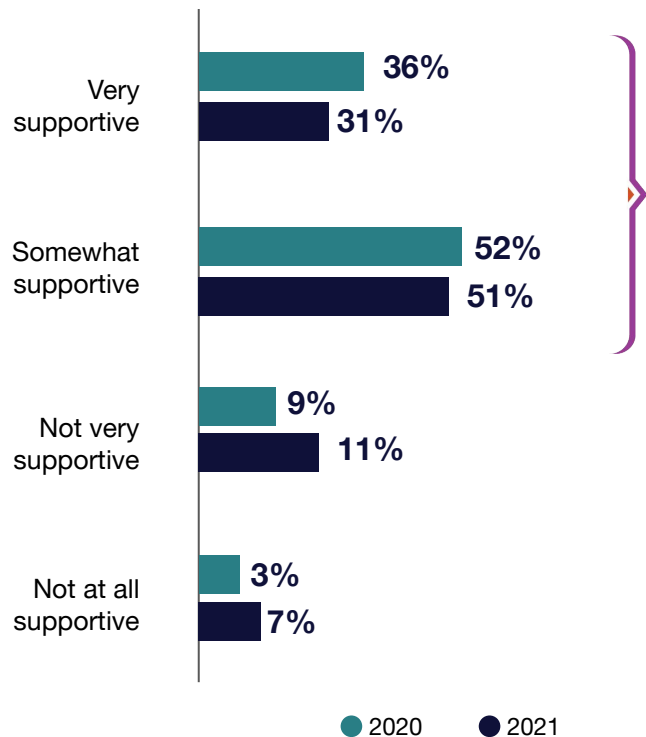
In 2021, Higher among...

| | |
|----------------------|-----|
| Sandwich Generation* | 90% |
| Senior Caregiver | 84% |
| Soccer Parent | 77% |
| \$60k+ HH Income | 76% |
| Disabled | 76% |
| Males | 72% |
| 18-54 | 71% |
| Urban/Suburban | 71% |

Also higher interest among those extremely or somewhat concerned with personal information being compromised (71%)

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

~8-in-10 Canadians are supportive of the concept of digital ID after reading how digital ID would allow many to authenticate themselves, thus redistributing personal support to those who need it most.

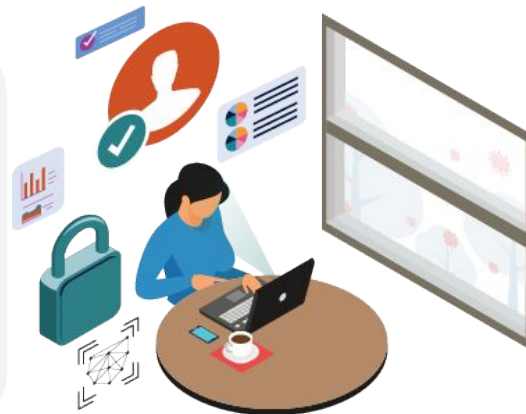
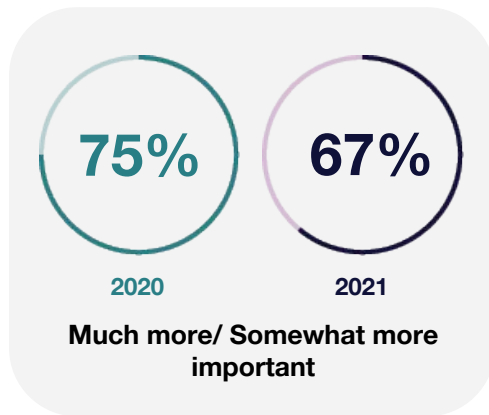
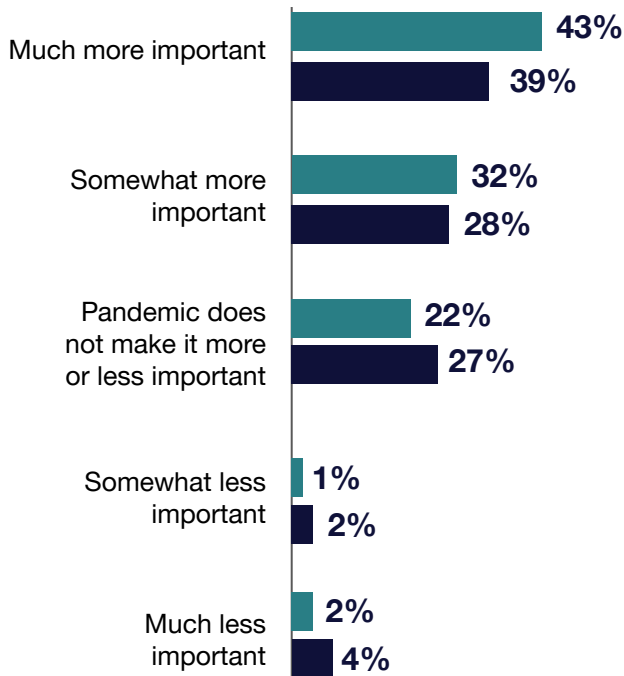


| Higher support among... | | Also higher support among those extremely concerned about their info being compromised (39%) |
|-------------------------|-----|--|
| Sandwich Generation* | 54% | |
| Senior Caregiver | 51% | |
| Disabled | 38% | |
| \$60K+ HH Income | 36% | |
| Soccer Parent | 35% | |

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

Two-thirds of Canadians feel the COVID-19 pandemic has made it more important to have a digital ID.

Do you think the COVID-19 pandemic makes it more or less important to have a secure, trusted, privacy-enhancing digital ID to help Canadians transact safely and securely online?



Greater importance among...

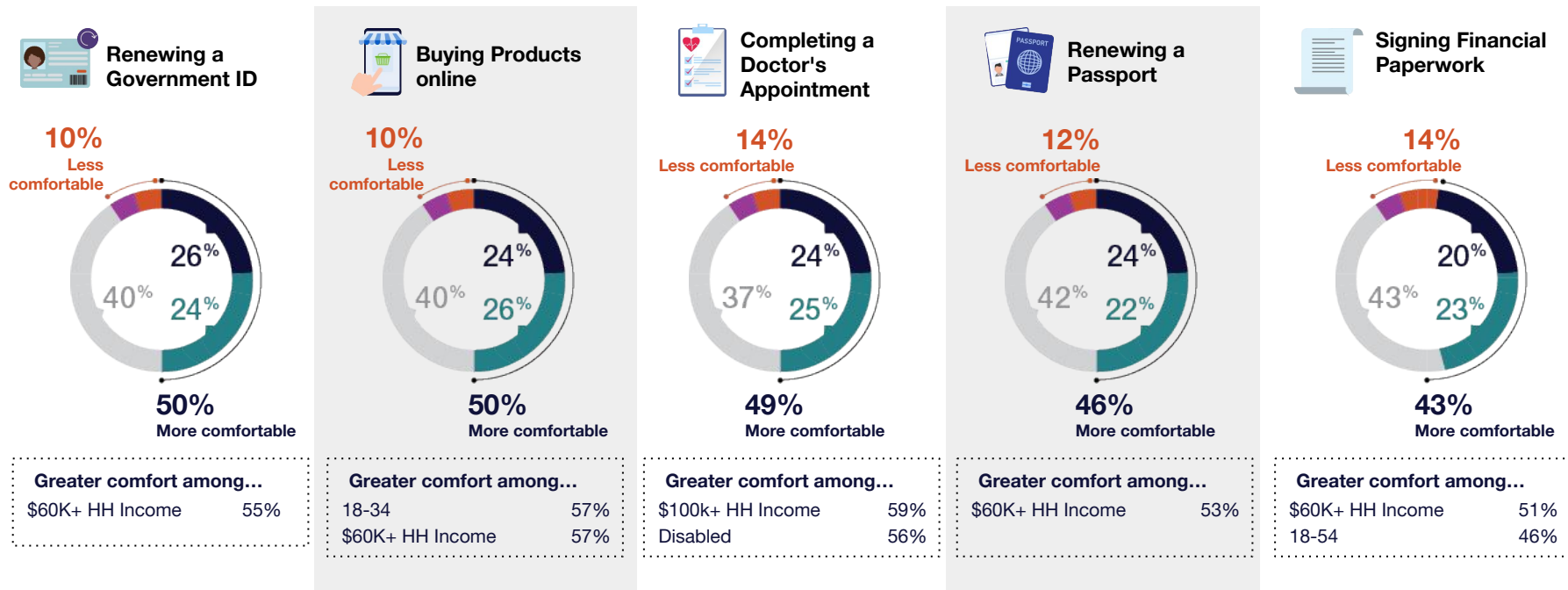
| | |
|----------------------|-----|
| Sandwich Generation* | 82% |
| Senior Caregiver | 74% |
| 55+ | 74% |
| \$60K+ HH Income | 73% |
| Urban/Suburban | 69% |

Also more important among those extremely/somewhat familiar with digital identity & those extremely/somewhat concerned with personal info being compromised (71%)

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

Due to the impacts of COVID-19, around half of Canadians are more comfortable completing various tasks and transactions digitally.

How comfortable are you completing each of these tasks digitally today vs. your comfort level pre-pandemic?

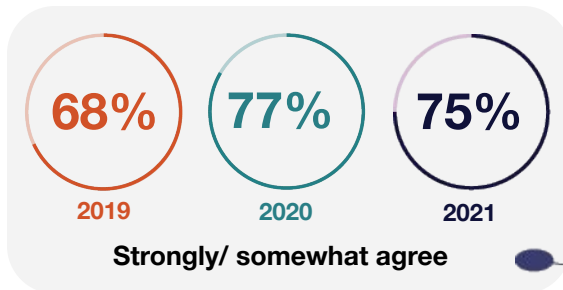
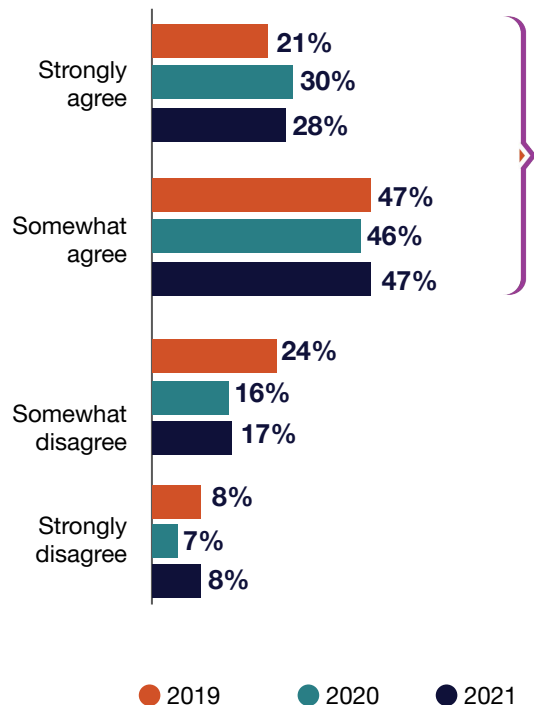


Greater comfort among... Soccer Parents, Senior Caregivers and Sandwich Generation for all digital tasks

● Much more comfortable
 ● Somewhat more comfortable
 ● No difference
 ● Somewhat less comfortable
 ● Much less comfortable

Most Canadians remain willing to share personal information online, while also being 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.



In 2021, greater willingness (strongly agree) among...

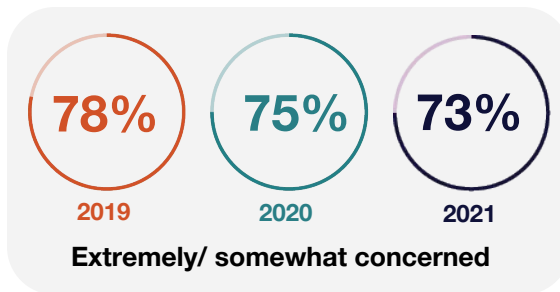
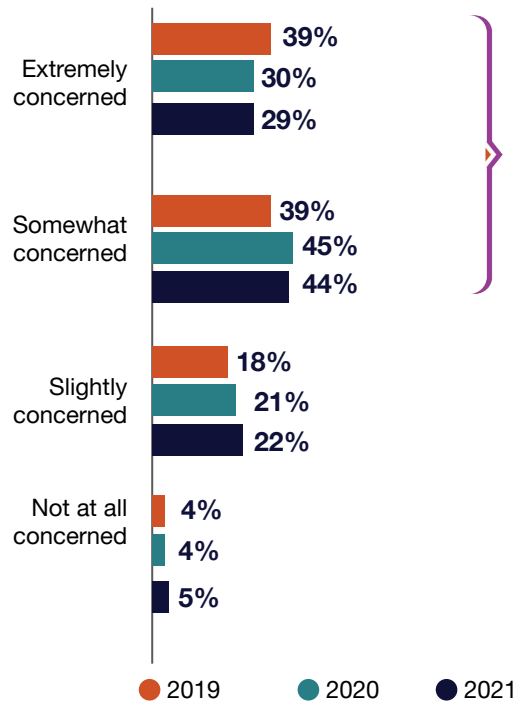
| | |
|----------------------|-----|
| Sandwich Generation* | 51% |
| Senior Caregiver | 41% |
| 18-54 | 38% |
| Disabled | 34% |
| Males | 33% |
| Soccer Parent | 32% |
| Urban | 31% |

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



Most Canadians remain willing to share personal information online, while also being concerned about their information being compromised.

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



In 2021, higher concern (extremely concerned) among...

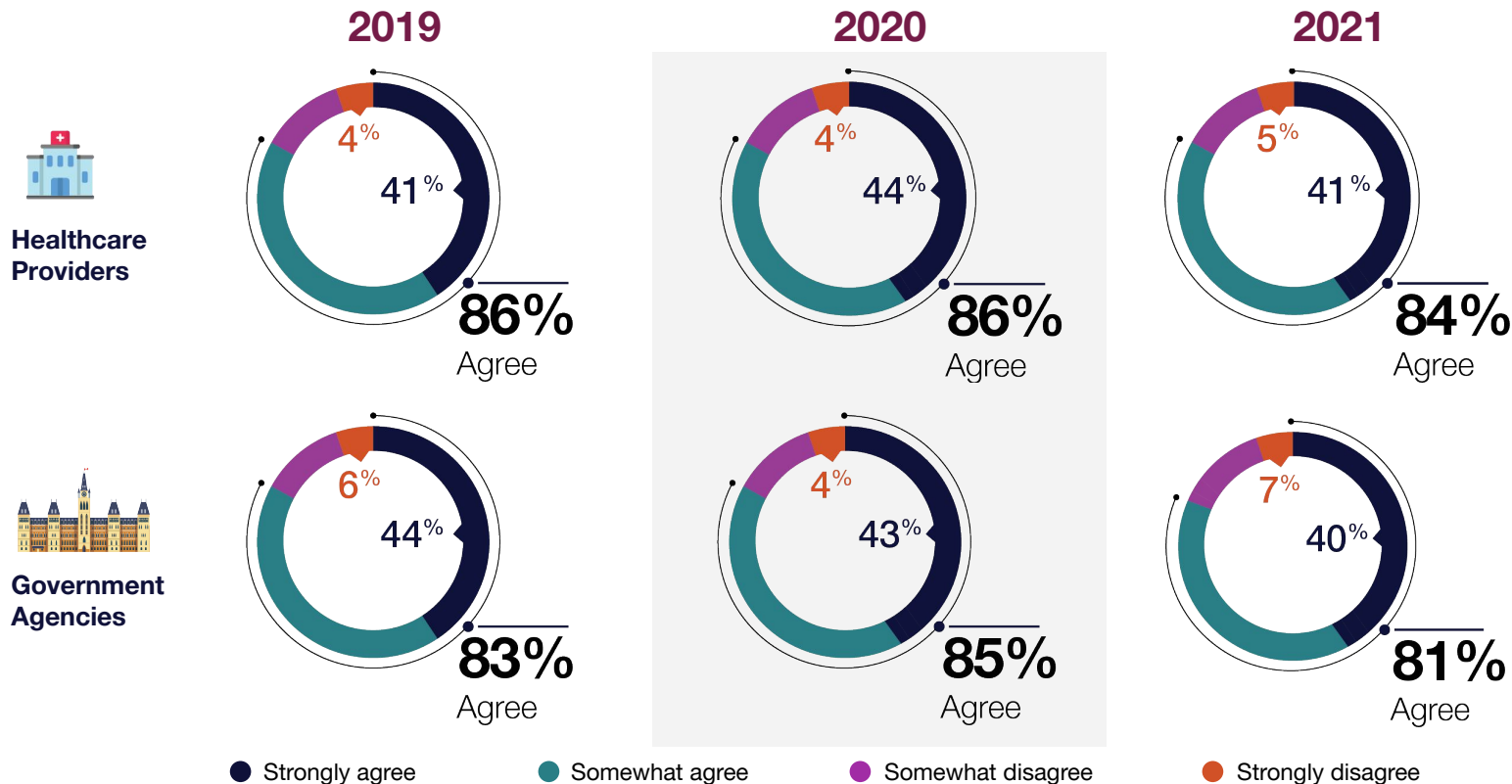
| | |
|----------------------|-----|
| Sandwich Generation* | 40% |
| Senior Caregiver | 36% |
| Disabled | 36% |
| Those in Ontario | 35% |

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



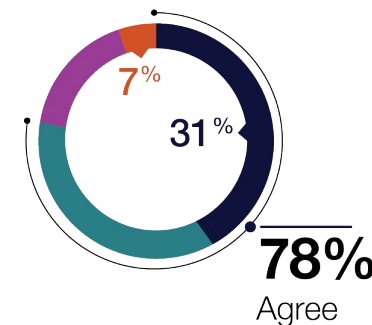
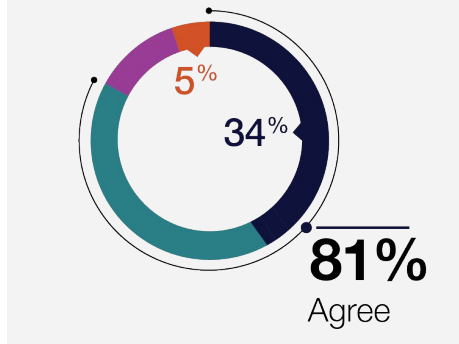
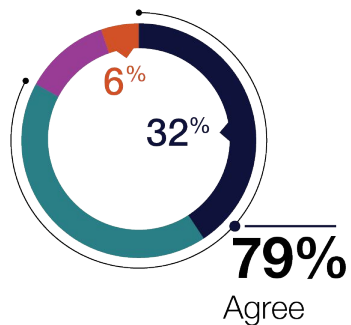
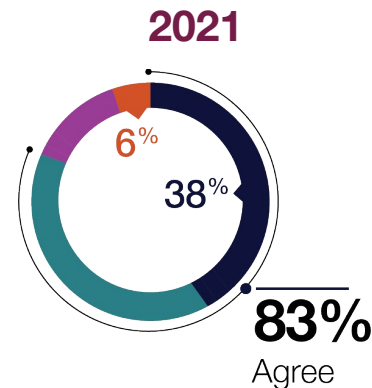
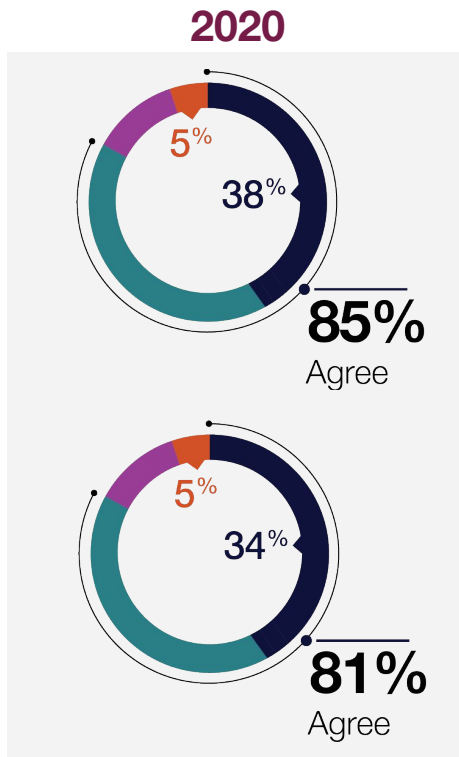
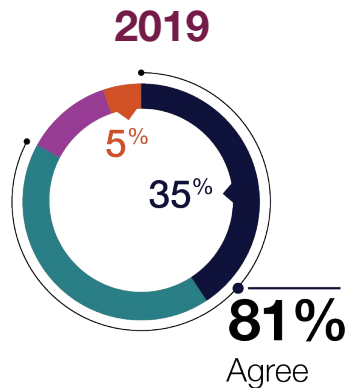
Healthcare providers, government agencies and FIs continue to be viewed as the most trustworthy to keep personal information safe.

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



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

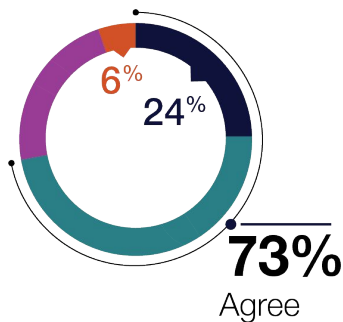
Healthcare providers, government agencies and FIs continue to be viewed as the most trustworthy to keep personal information safe.

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

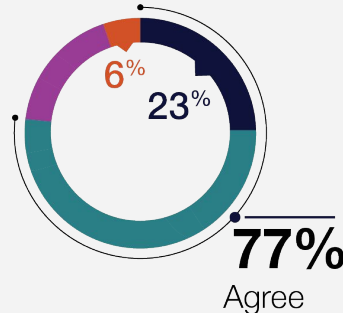


Academic Organizations

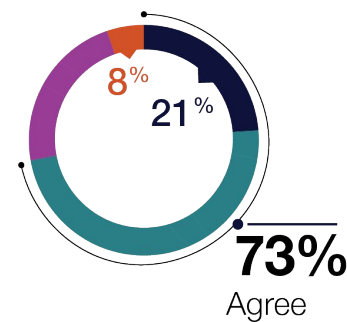
2019



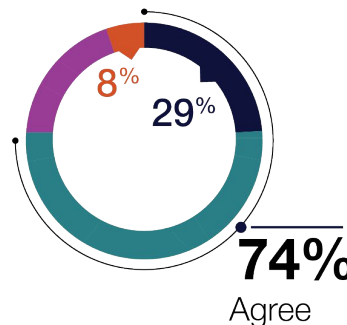
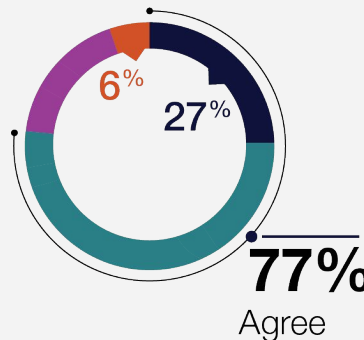
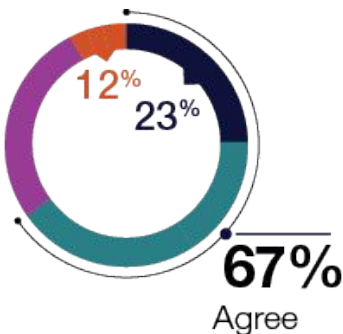
2020



2021



Credit Card Companies



● Strongly agree

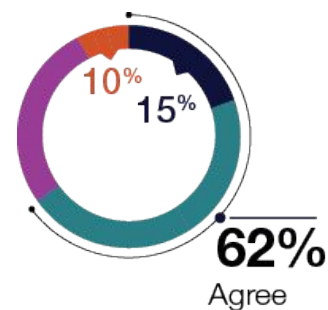
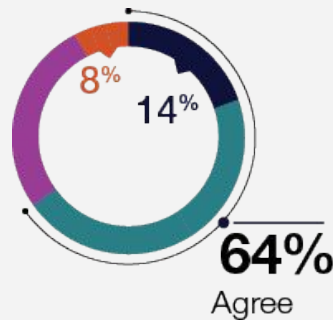
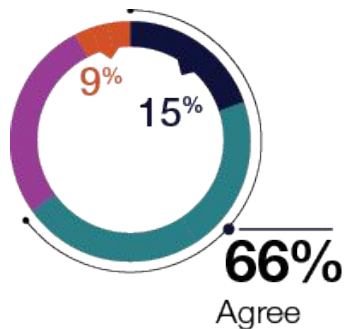
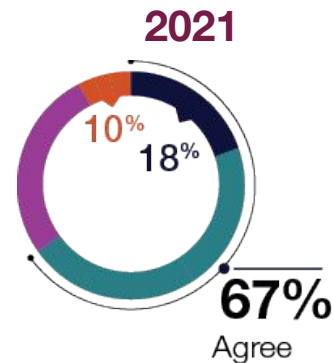
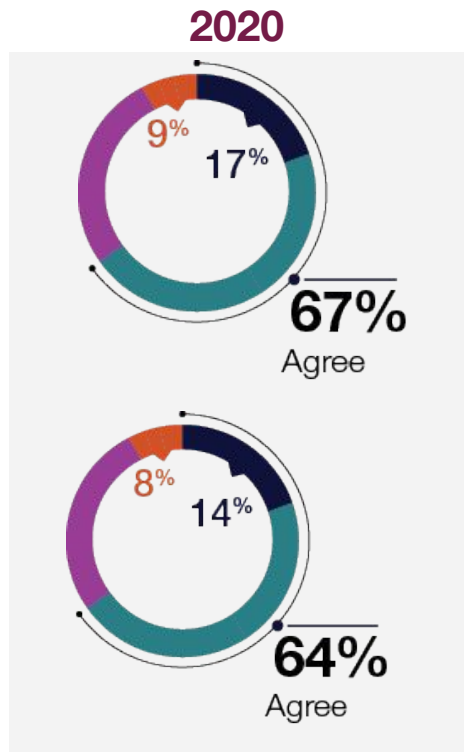
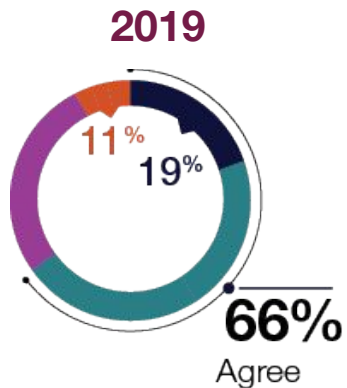
● Somewhat agree

● Somewhat disagree

● Strongly disagree

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

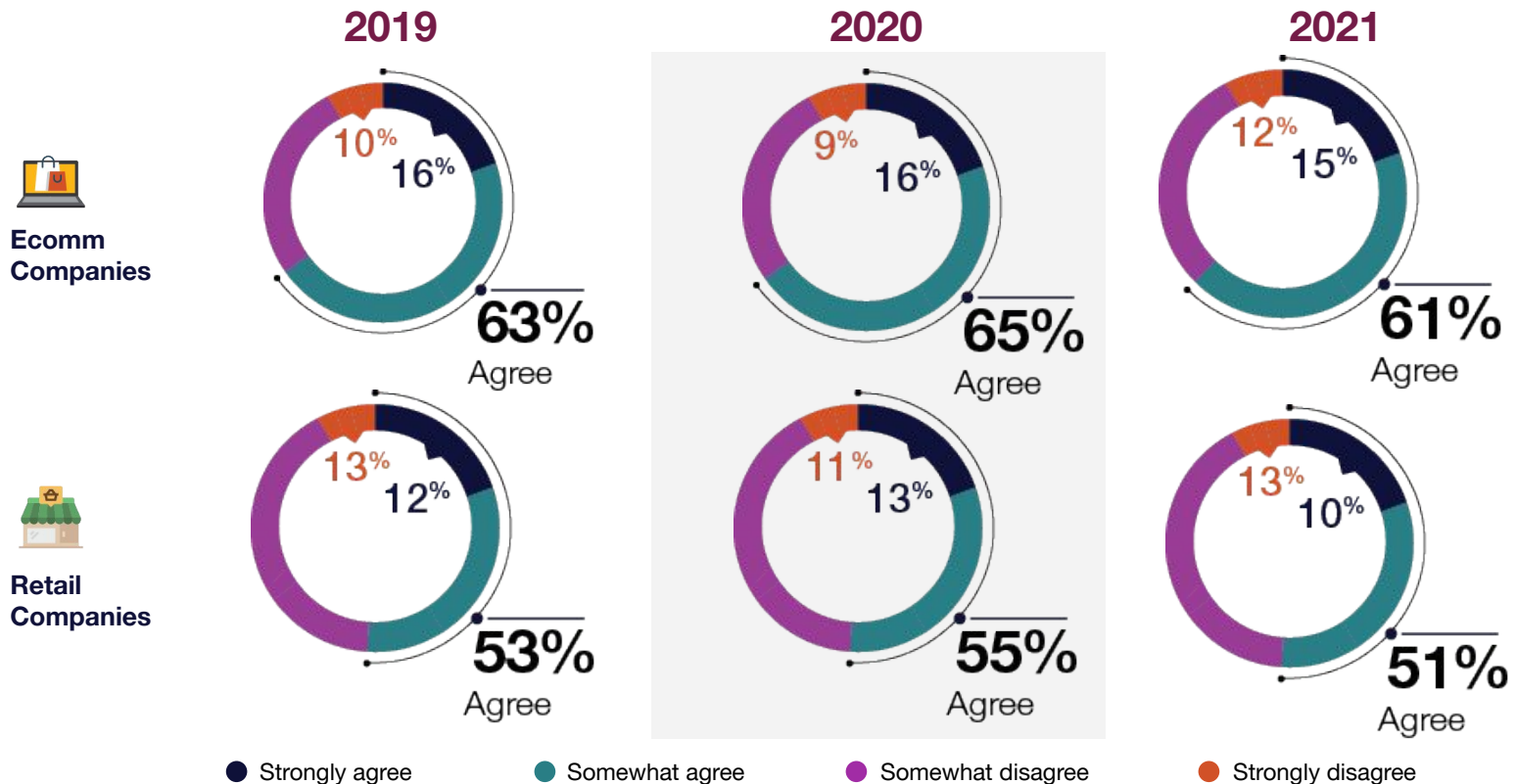
● Somewhat agree

● Somewhat disagree

● Strongly disagree

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?



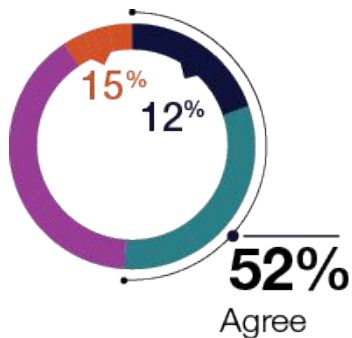
Canadians continue to be least likely to trust social media sites, travel sites, internet providers and retail companies to safeguard their personal information

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

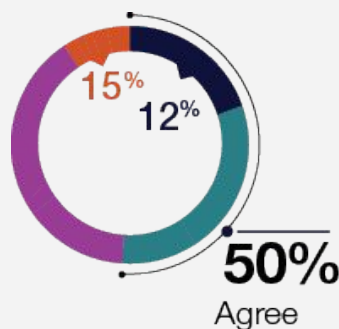


Internet Providers

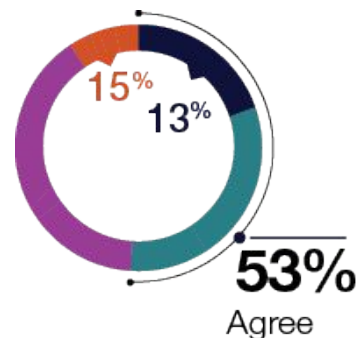
2019



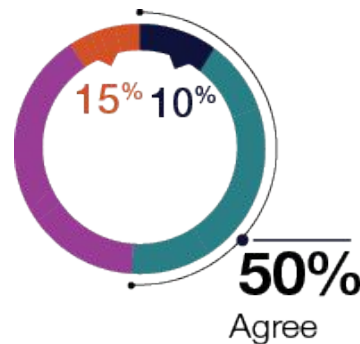
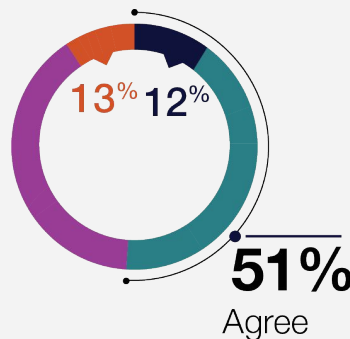
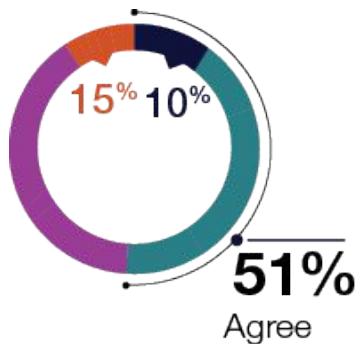
2020



2021



Travel Sites



● Strongly agree

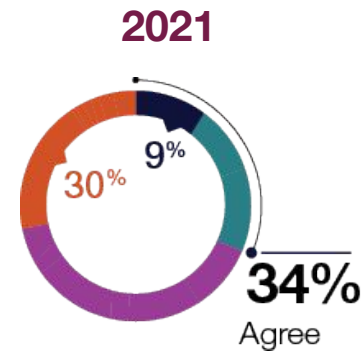
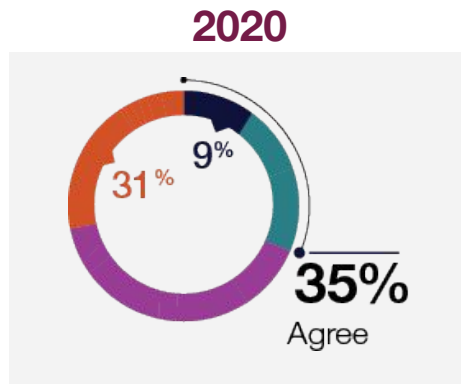
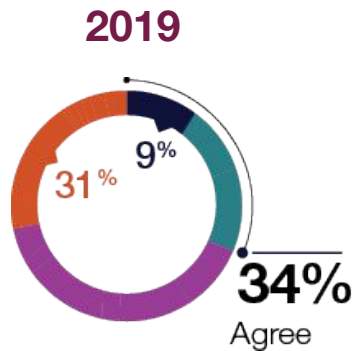
● Somewhat agree

● Somewhat disagree

● Strongly disagree

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

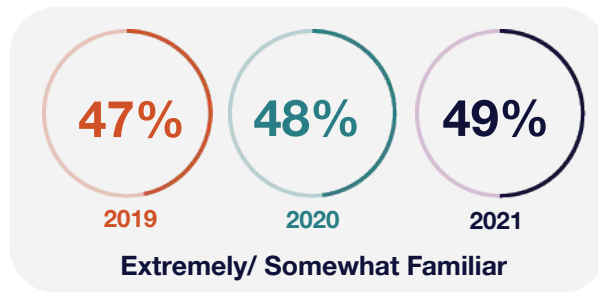
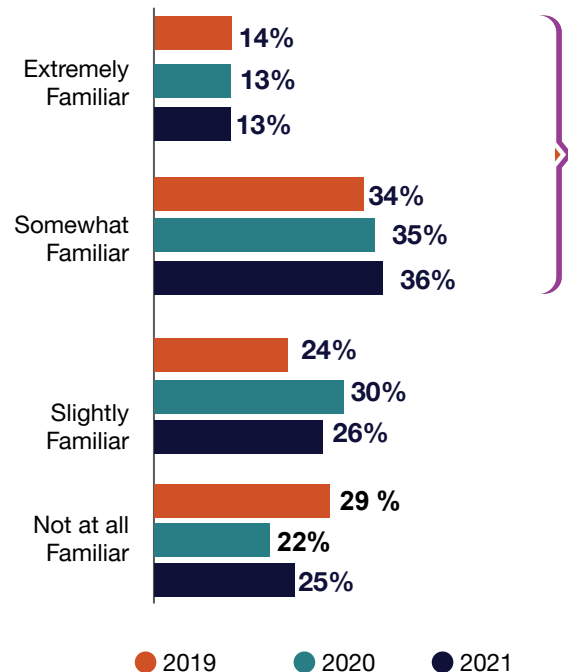
How strongly do you agree or disagree... that you trust each of the following to keep your personal information safe and secure?



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

Similar to previous years, ~half of Canadians continue to be familiar with the concept of “digital identity”.

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



In 2021... Highest Familiarity among...

| | |
|----------------------|-----|
| Sandwich Generation* | 73% |
| 18-34 | 70% |
| Senior Caregiver | 61% |
| Soccer Parent | 60% |
| \$100k+ HH Income | 60% |
| Males | 55% |







Lowest Familiarity among...

| | |
|-----------|-----|
| Quebecers | 40% |
| Rural | 34% |

Also lower familiarity among those only slightly or not at all concerned about personal info being compromised (41%)

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

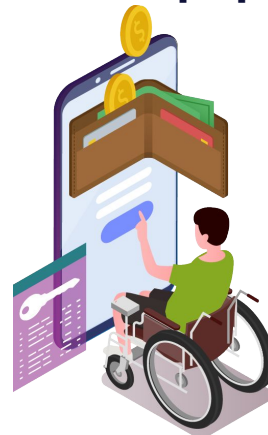
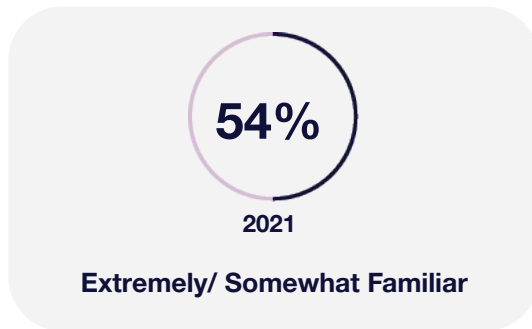
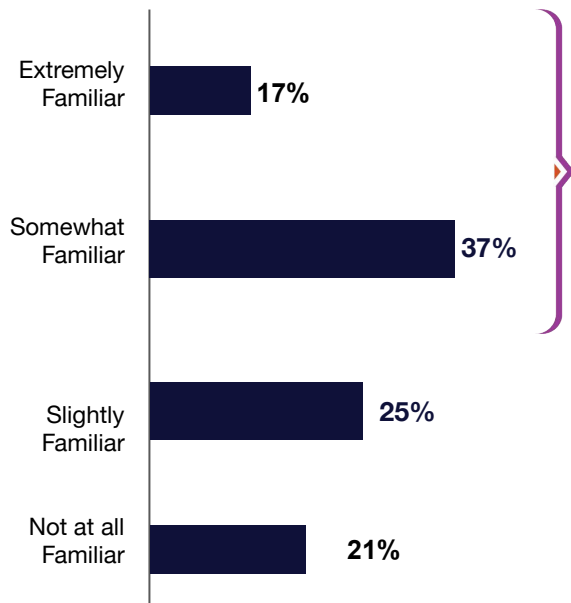
A third of Canadians have used vaccine passports, and familiarity and use of biometrics continues to increase.

| Which of the following... | | Fit within your definition of “digital identity”? | | | Have you personally used? | | |
|---|---|---|------|------------|---------------------------|------|------------|
| | | 2019 | 2020 | 2021 | 2019 | 2020 | 2021 |
|  | Online passwords | 57% | 55% | 54% | 54% | 53% | 51% |
|  | Answering knowledge-based questions digitally | 56% | 52% | 48% | 52% | 49% | 44% |
|  | Logging into social media accounts | 54% | 50% | 52% | 48% | 45% | 47% |
|  | Biometrics | 55% | 61% | 61% | 27% | 35% | 35% |
|  | Vaccine passports issued by the government | n/a | n/a | 42% | n/a | n/a | 32% |
|  | None of the above | 13% | 9% | 8% | 22% | 21% | 19% |



Half are also familiar with “digital wallets”, and 4-in-10 are currently using a digital wallet on a smartphone, with Apple Wallet being the most popular.

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

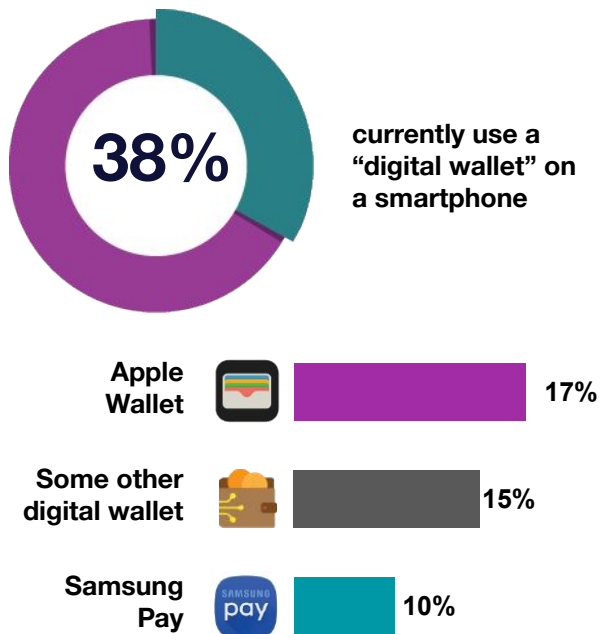


Highest Familiarity among..

| | |
|----------------------|-----|
| Sandwich Generation* | 75% |
| 18-34 | 74% |
| Soccer Parent | 65% |
| Senior Caregiver | 64% |
| Ontarians | 62% |
| \$60k+ HH Income | 60% |
| Disabled | 60% |
| Males | 59% |
| Urban | 59% |

**Also higher among those...
extremely/somewhat familiar
with digital identity (82%)**

Half of Canadians are familiar with “digital wallets”, and 4-in-10 are currently using one on a smartphone, with Apple Wallet being the most popular.



Highest Usage among...

| | |
|----------------------|-----|
| Sandwich Generation* | 78% |
| Senior Caregiver | 62% |
| Soccer Parent | 51% |
| 18-54 | 50% |
| Albertans | 46% |
| \$60k+ HH Income | 46% |
| Urban | 43% |

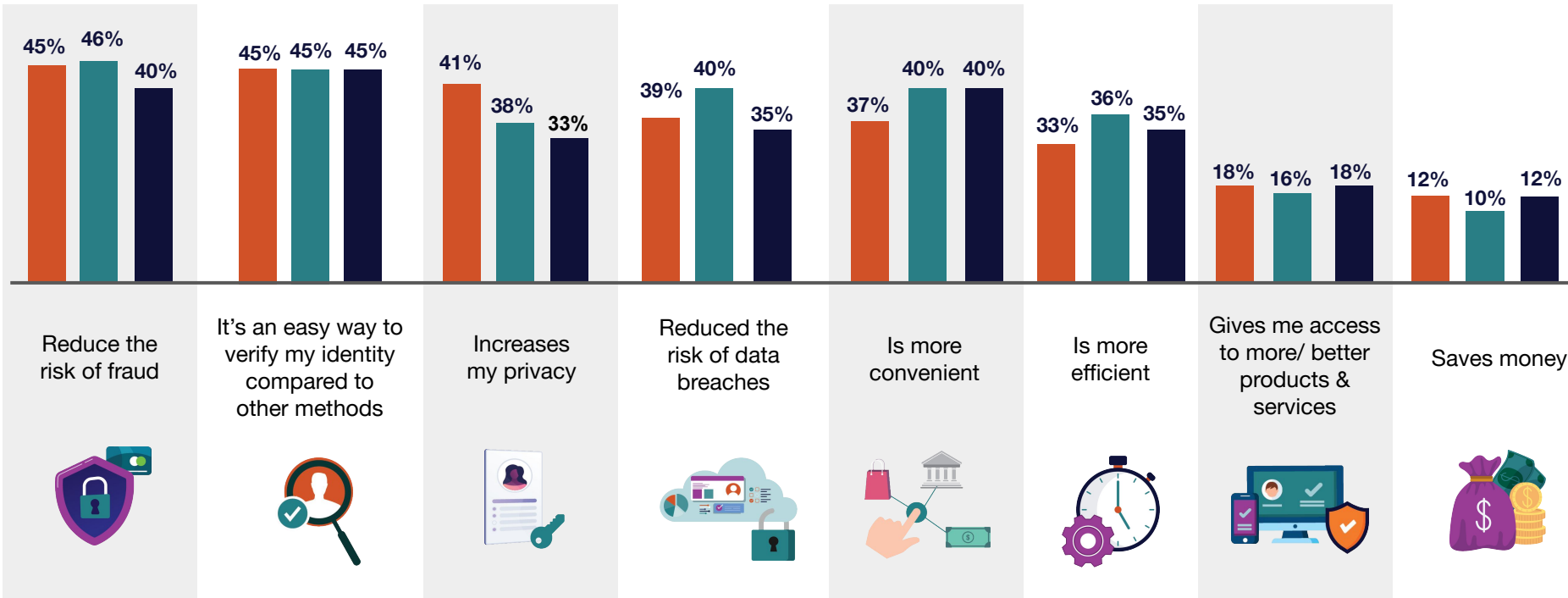
Also higher among those...
extremely/somewhat familiar with
digital identity (55%)

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



The main benefits of “digital identity” are being an easy way to verify one’s identity and reducing fraud. There is more skepticism around “digital identity” protecting personal information.

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



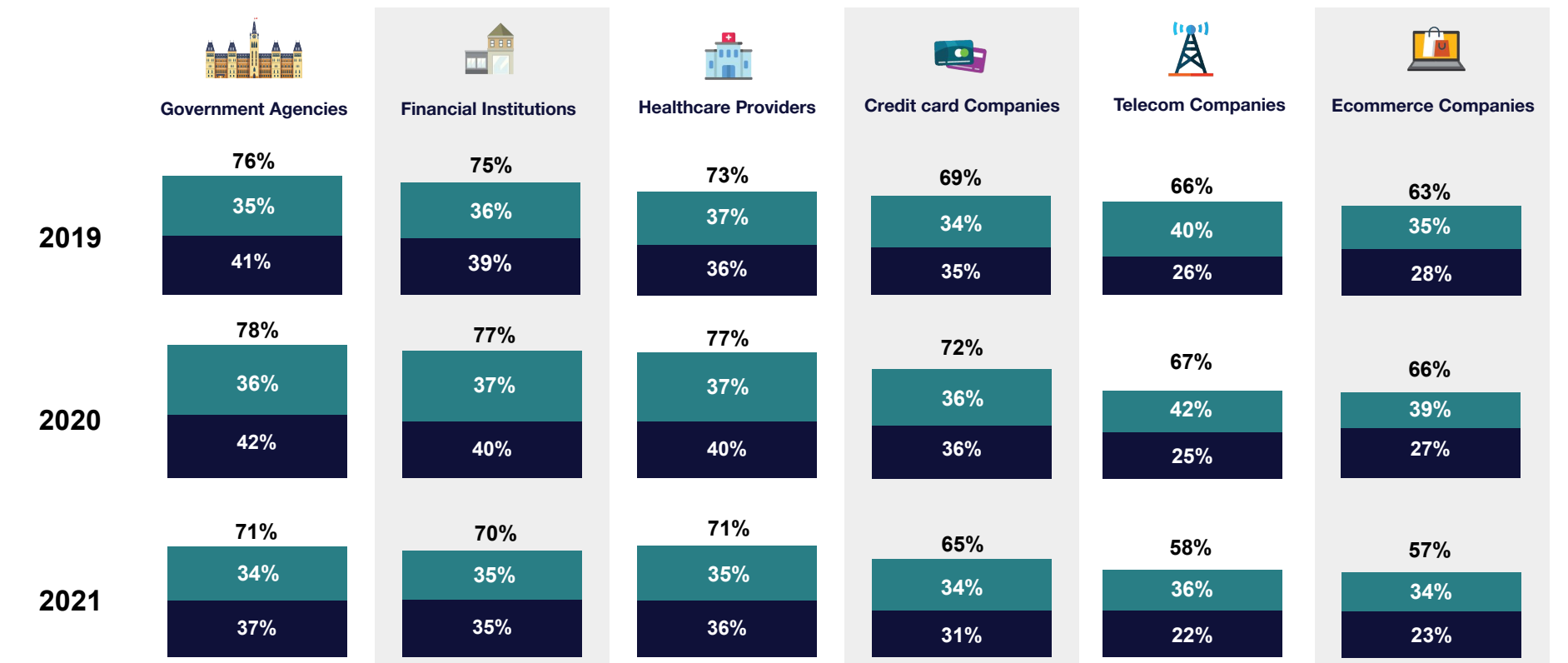
2019

2020

2021

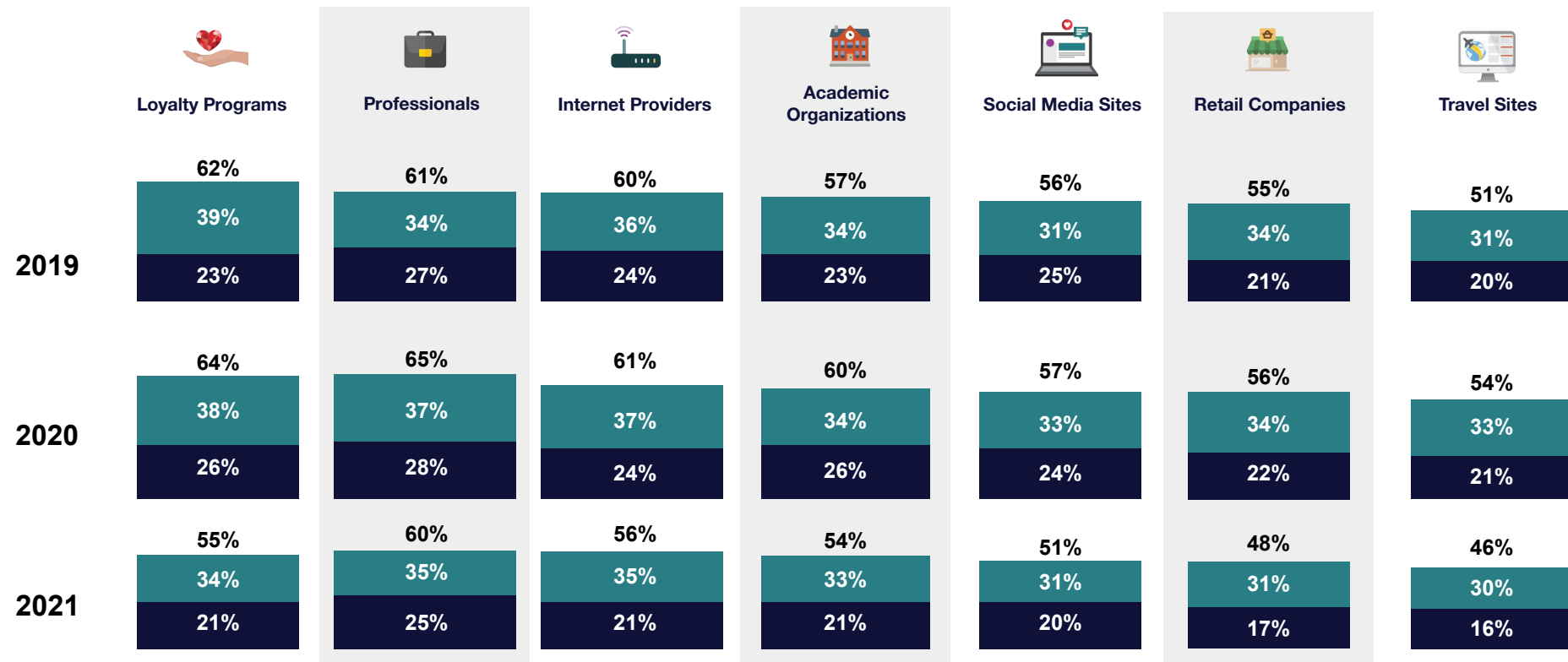
Interest in using digital ID authentication with all organizations has diminished, but still remains quite high for government agencies, FI's and healthcare providers.

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



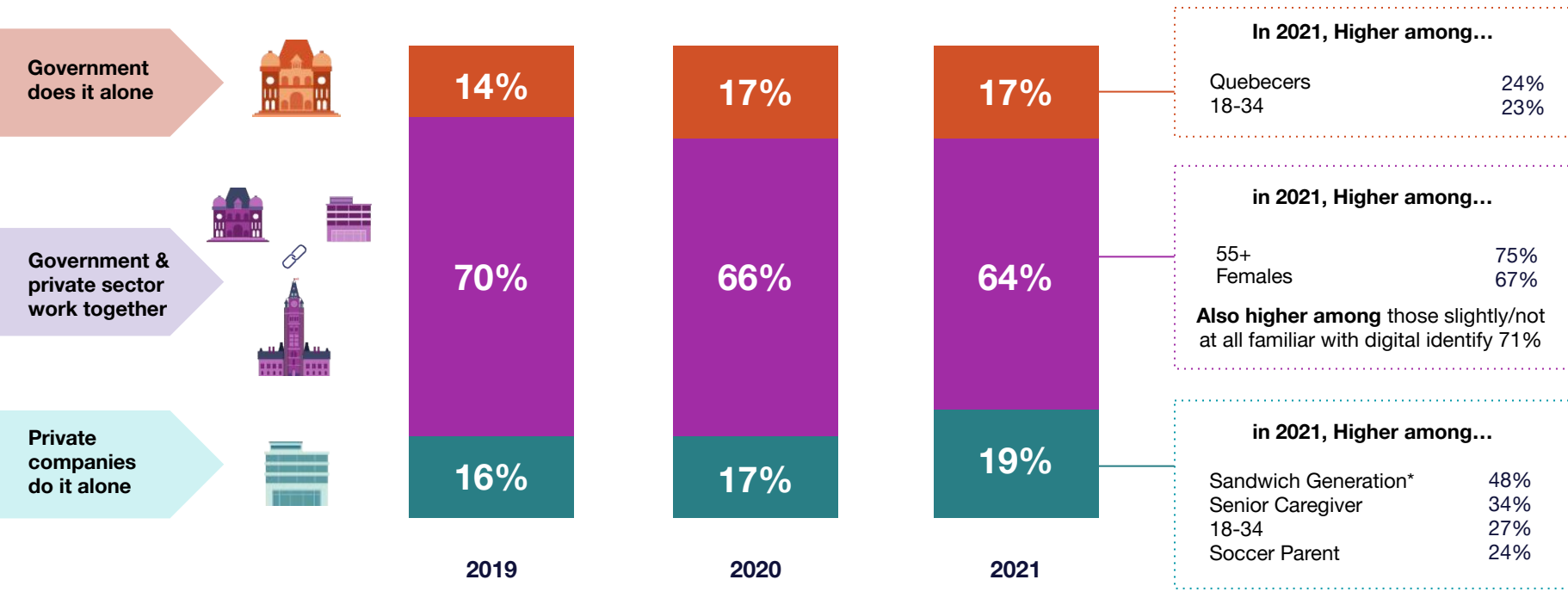
Interest in using digital ID authentication continues to be the lowest for travel sites and retail companies.

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



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?



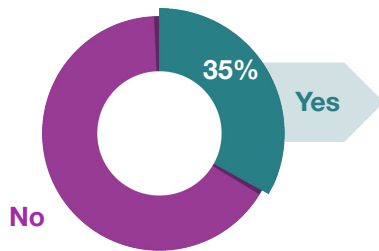
*Individuals caring for both a dependent child and an ageing parent or family member.

Parents/guardians remain interested in using a trusted & secure digital identity for a variety of tasks.

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?

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

2020




Tracking health records

85%

37%

48%


Registering for & managing government programs

81%

37%

44%


Registering for school

79%

39%

40%

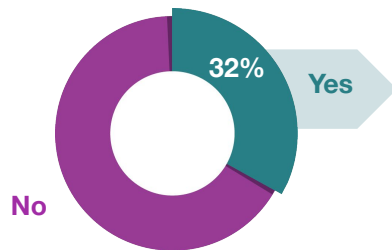

Signing consent forms

79%

39%

40%

2021



78%

35%

43%

78%

38%

40%

77%

37%

40%

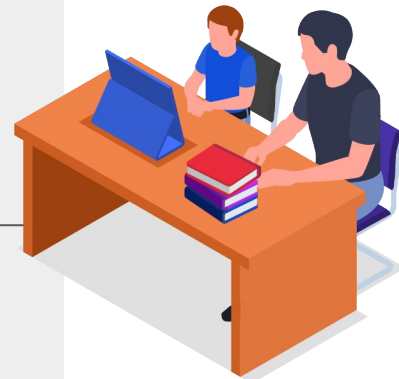
77%

39%

38%

● Extremely interested

● Somewhat interested



Caregivers continue to express an interest in using a trusted & secure digital identity for the tasks they handle for the senior(s) in their care.

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?

Do you care for and/or manage the affairs of any senior citizens?



Registering for & managing government programs



Tracking health records

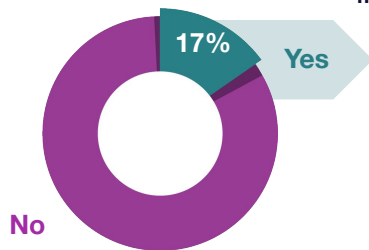


Signing consent forms



Undertaking Legal Transactions

2020



89%

41%

48%

88%

36%

52%

88%

43%

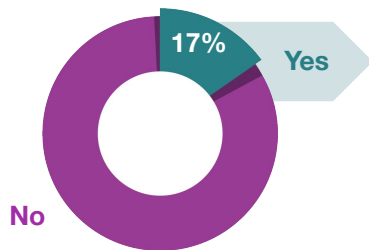
45%

84%

36%

48%

2021



81%

33%

48%

81%

30%

51%

79%

34%

45%

81%

31%

50%

● Very interested

● Somewhat interested



Three-quarters of Canadians believe it's important for federal and provincial government agencies to move quickly to enable a trusted & secure digital ID.

FEDERAL GOVERNMENT



Very/ somewhat important



2020



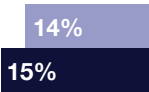
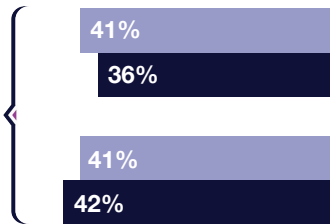
2021

Greater importance among...

| | |
|---------------------|-----|
| Sandwich Generation | 48% |
| Senior Caregiver | 45% |
| Quebecers | 42% |
| 55+ | 42% |
| Disabled | 42% |

Also more important among those who are extremely...

Concerned with personal info being compromised (47%) and familiar with digital identity (57%)



Very important

Somewhat important

Not very important

Not at all important

2020

2021

PROVINCIAL GOVERNMENT



PROVINCIAL GOVERNMENT

Very/ somewhat important



2020



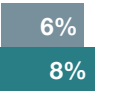
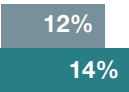
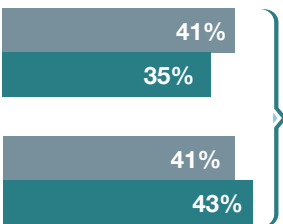
2021

Greater importance among...

| | |
|---------------------|-----|
| Sandwich Generation | 52% |
| Senior Caregiver | 48% |
| Disabled | 42% |

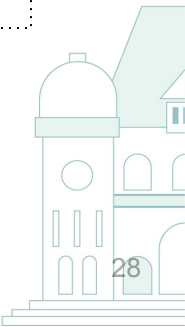
Also more important among those who are extremely...

Concerned with personal info being compromised (48%) and familiar with digital identity (57%)



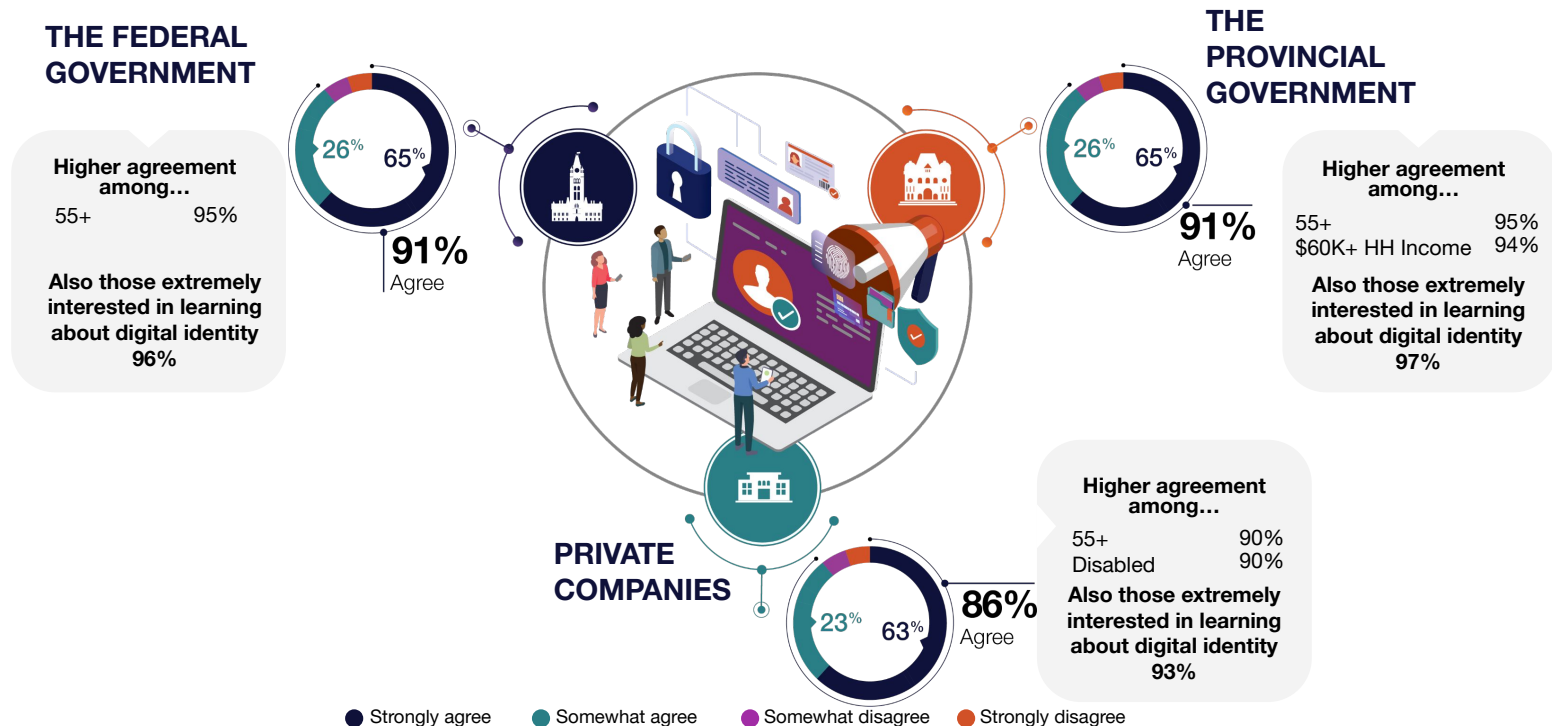
2020

2021



A strong majority of Canadians agree that they should have access to the personal data collected about them by the provincial government, the federal government, and private companies

How strongly do you agree or disagree... I believe I should have the right to access all personal data collected about me by...



Regional Findings For Atlantic Provinces*



Atlantic Canadians report **lower levels of concern** about their personal info getting compromised online (65% while most other regions ranged from 71-78%).

When it comes to vaccine passports issued by the government, those residing in Atlantic provinces are **least likely to have used this form of digital identity.**

32%
Overall

Vs

21%
Least likely



Atlantic respondents are **less likely to be extremely or somewhat familiar** with the concept of “digital identity” (44%, most other regions ranging from 49-54%).

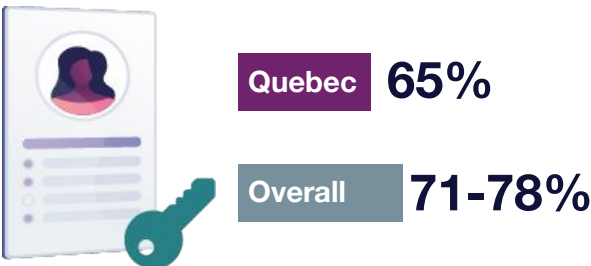
*Atlantic Provinces include Prince Edward Island (PEI), Newfoundland & Labrador, Nova Scotia, New Brunswick.

Regional Findings For Quebec

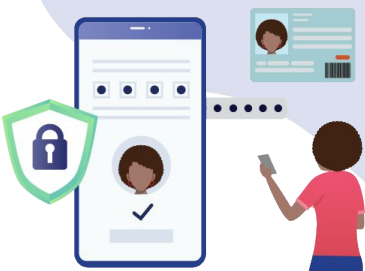
Quebecers are most likely to **prefer the government create a safe & secure digital ID framework for all Canadians on their own without partnering with private companies** (24% vs. 17% overall).



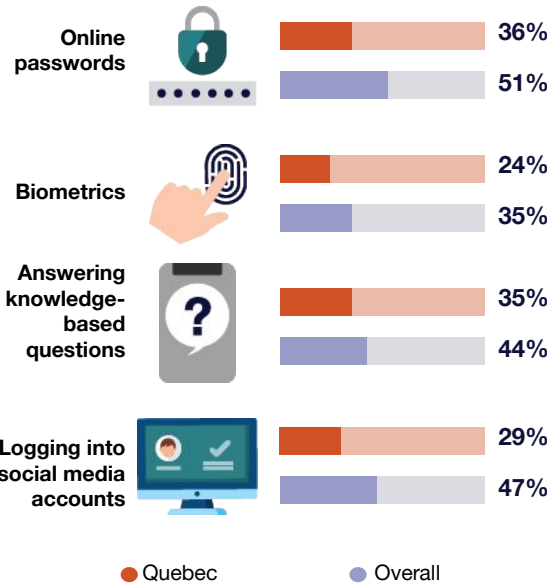
Quebec residents report **lower levels of concern about their personal info being compromised online**



Quebec respondents are least likely to be **extremely or somewhat familiar with the concept of “digital identity”** (40%, other regions ranging from 49-54%).



Quebecers are **less likely to have used most forms of digital identity** asked about specifically, including :



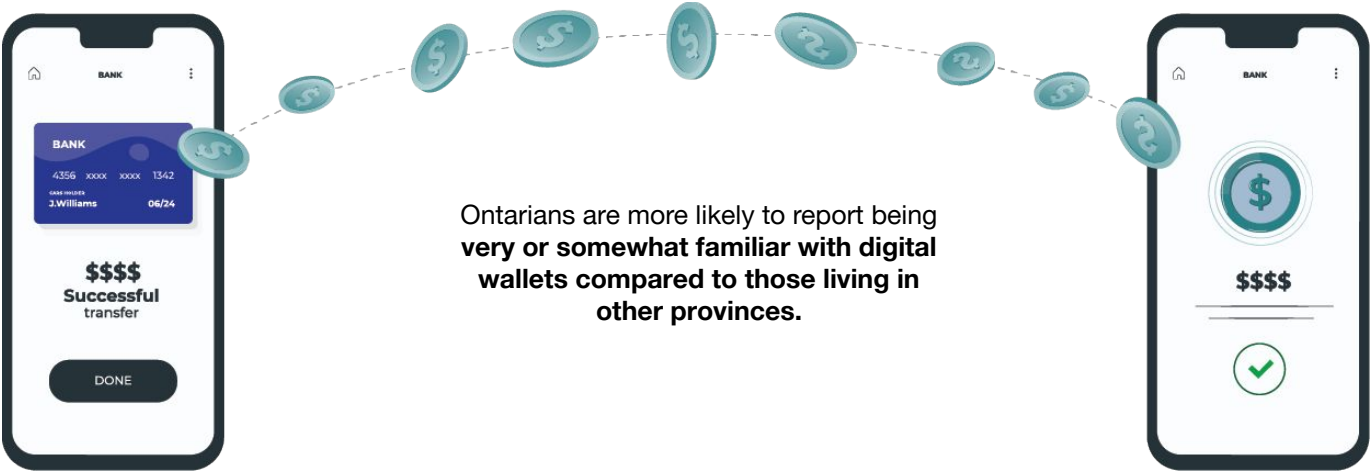
Quebecers are **less likely to think digital ID will increase their privacy** (26% compared to 33% overall).



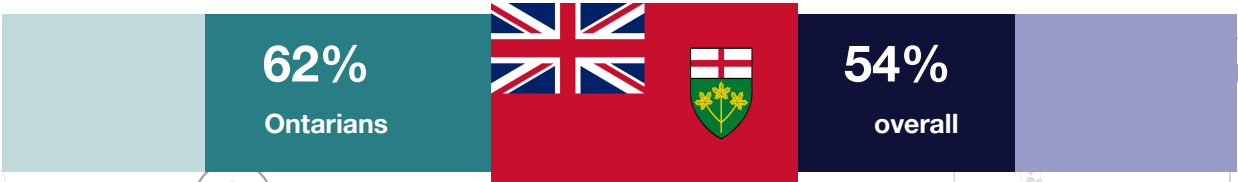
When it comes to comfort levels completing digital tasks online today vs. pre-pandemic, those residing in Quebec report **lower levels of comfort across tasks relative to those living in most other provinces (except Saskatchewan/ Manitoba).**



Regional Findings For Ontario*



Ontarians are more likely to report being **very or somewhat familiar** with digital wallets compared to those living in other provinces.

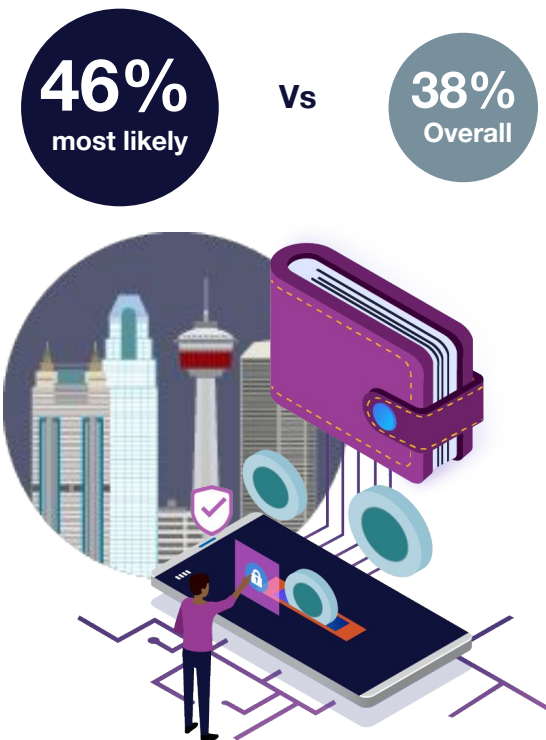


Regional Findings For Western Canada*

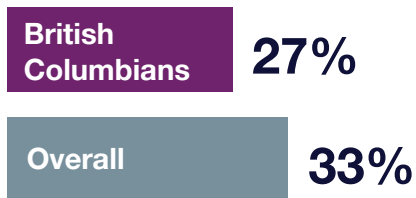
When it comes to comfort levels completing digital tasks online today vs. pre-pandemic, those residing in Manitoba/ Saskatchewan report **lower levels of comfort across tasks relative to those living in other provinces (except Quebec).**



Albertans are **most likely to have used a digital wallet**

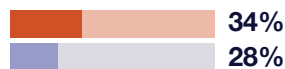


British Columbians are **least likely to think digital identity will increase their privacy**

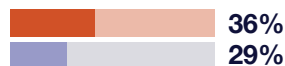


Difference by key subgroups: Self-assessed as disabled

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



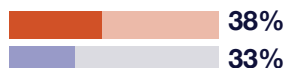
More likely to be concerned about their personal information being compromised online



More likely to be very or somewhat familiar with the concept of a “digital wallet”



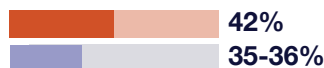
More likely to consider “increases my privacy” as a benefit of digital ID



Higher interest in learning more about digital ID



They are more likely to consider it “very important” that their provincial government and the federal government



Report higher levels of comfort completing doctor’s appointments digitally today vs. pre-pandemic



● Self-assessed as disabled ● Overall

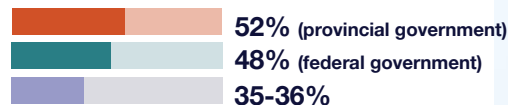


Difference by key subgroups: Sandwich generation

More likely to think the pandemic makes it much/somewhat more important to have a secure, trusted, privacy-enhancing digital ID to help Canadians transact safely and securely



More likely to consider it “very important” that their provincial government move quickly on digital ID



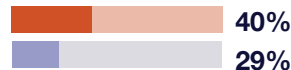
More interested in leveraging a trusted digital ID for four childcare-based tasks (i.e., tracking health records, registering for and managing government programs, registering for school and signing consent forms).



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



● Sandwich generation

● Overall



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

Difference by key subgroups: Sandwich generation

More familiar with the concept of digital ID



More likely to be very or somewhat familiar with the concept of a “digital wallet”.



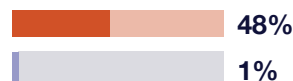
They are also most likely to use a “digital wallet” on their smartphone.



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



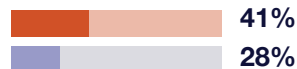
*Individuals caring for both a dependent child and an ageing parent or family member.

Difference by key subgroups: Caretakers for seniors

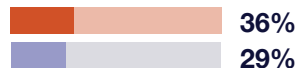
They are more likely to think the pandemic makes it much/somewhat more important that Canadians have a secure, trusted, privacy-enhancing digital ID to help Canadians transact safely and securely online.



More likely to strongly agree that they are willing to share more personal info 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



● Caretakers for seniors

● Overall



Difference by key subgroups: Caretakers for seniors

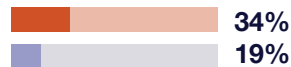
More likely to be very or somewhat familiar with the concept of a “digital wallet”.



They are also more likely to use a “digital wallet” on their smartphone



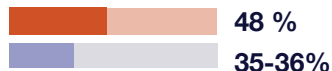
More likely to think private companies alone should create a pan-Canadian digital ID framework.



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 the government move quickly on digital ID



● Caretakers for seniors

● Overall



Survey Methodology

The survey was conducted by Burak Jacobson Research Partners from Dec 7 - 9, 2021 with over 1,500 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, Other, Prefer not to answer
- 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 caretakers = care for and/or manage the affairs of any senior citizen(s)
- Sandwich generation = both soccer parent AND senior caretaker
- Concern about personal information being compromised online = Extremely concerned vs. other 3 options

Breakdown of participants by province:

| Province | Number |
|-------------------------|-------------|
| British Columbia | 205 |
| Alberta | 171 |
| Manitoba & Saskatchewan | 97 |
| Ontario | 587 |
| Quebec | 339 |
| Atlantic | 101 |
| Number | 1500 |

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



Join the DIACC

Be part of the world-leading community unlocking economic and social opportunities for all by building a robust, secure, interoperable, and privacy-enhancing digital identification and authentication ecosystem.

Contact

The Digital ID and Authentication Council of Canada



diacc.ca

[in /company/mydiacc](https://www.linkedin.com/company/mydiacc)



[@mydiacc](https://twitter.com/mydiacc)

[f /mydiacc](https://www.facebook.com/mydiacc)

