



Agriculture and  
Agri-Food Canada

Agriculture et  
Agroalimentaire Canada



# New Technologies ('Web 2.0') and GC Communications

*Summary of Telephone Results*

March 2008

Canada 



# Presentation Agenda

Introduction

Internet Usage

Interactions with the Government of Canada (GC)

Awareness & Use of Web 2.0 Applications

Potential Use of Web 2.0 Applications by the GC

Phone vs. Online Comparison

Conclusions and Implications



# Introduction

# Background

- **Context:** New and emerging, Internet-based technologies and applications are changing the way people use the Internet. These technologies and applications collectively are referred to by some as 'Web 2.0' and include:
  - *Blogs*
  - *Wikis*
  - *Social networking sites*
  - *YouTube*
  - *Pod/video/webcasts*
  - *Message boards, forums*
  - *RSS feeds*
- Other countries and other levels of government in Canada have begun using these new technologies in their interactions with their citizens. Some federal departments are also assessing their potential use.
- A number of research companies already track the changing nature of the Internet as part of their syndicated research, as does the biannual Statistics Canada internet use survey.
- However, this study focused in particular on how these new and emerging technologies and applications could be used by the GC.

# Background (cont'd)

- **Purpose:** Conduct a custom research project (both qualitative and quantitative) on the awareness, attitudes and behaviours of Canadians vis-à-vis “Web 2.0” technologies and applications from the perspective of their potential use by the GC in its outreach, communications, and service delivery.
- The project was led by Agriculture and Agri-food Canada, with assistance from PWGSC, TBS, and PCO.
- Funding for this project came from 23 different federal departments and agencies, leveraging many, relatively modest contributions to finance a comprehensive study tailored specifically for GC needs.
- This approach yielded not only a more fulsome body of knowledge, but also a number of spin-off studies including:
  - *an online survey using the GC Internet Research Panel,*
  - *a ground-breaking survey of a sub-sample of Canadians from “cell-phone-only” households; and*
  - *a secondary analysis of “Web Generation” Canadians aged 16-24.*

**NOTE:** The study did not test specific applications, nor did it address reputation management issues vis-à-vis the GC ‘brand’.

# Methodology

## *Qualitative Research*

- 12 focus groups conducted September 17-20, 2007, with two sessions in each of the following locations: Halifax, Montreal, Saint-Hyacinthe, Toronto, Calgary, and Fort St. John.
- These locations were chosen to ensure a representative mix of regions, language groups, and urban/rural populations.
- The focus groups were further designed to ensure a mix of participants by age, ethnicity, education, income, and gender as well as three segments of the general public:
  1. Web 2.0 Users: Internet users who used at least three “Web 2.0” applications a few times a month or more during the past six months
  2. Internet Users, non-Web 2.0: Internet users who have not used any of these applications or used them less than “Web 2.0” users
  3. Non-users of the Internet: Individuals who have never used the Internet

# Methodology (cont'd)

## *Quantitative Research*

### Telephone:

- Sample size: 1,718 respondents
- Average length: 18.5 minutes overall; 21.4 minutes for Internet users
- Random-digit-dialling (RDD) survey
- Fieldwork: October 17 to November 3, 2007
- Response rate: 22%; Margin of error: +/- 2.4%, 19 times out of 20

### Online:

- Sample size: 2,619 respondents
- Average length: 17.3 minutes
- Panel survey (GC Internet Panel)
- Fieldwork: October 23 to November 6, 2007
- Response rate: 66%\*; Margin of error: N/A\*\*

*Both surveys were stratified by region and by gender.*

*Both samples were weighted by age and by gender.*

\* The online portion of this study was fielded using panelists who had already agreed in principle to complete surveys conducted by the government.

\*\* Probability sampling was not used to draw the sample, therefore a margin of error cannot be calculated.

# Methodology (cont'd)

*Note that, for the most part, only results of the telephone survey appear on these slides.*

*These results have been given primacy in this study because:*

- these results are representative of the Canadian population from a methodological point of view, because random-digit dialling (RDD) is used in probability sampling, which is not the case for online surveys;
- the online portion of this study was conducted using the GC Internet Research Panel, i.e., with Canadians recruited only from GC websites.

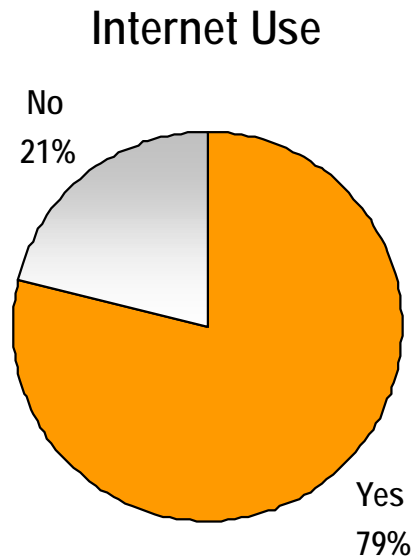
The qualitative research was conducted prior to the surveys; these focus groups were used to gain a more in-depth understanding of Canadians' awareness, attitudes and behaviours vis-à-vis the various 'Web 2.0' applications.



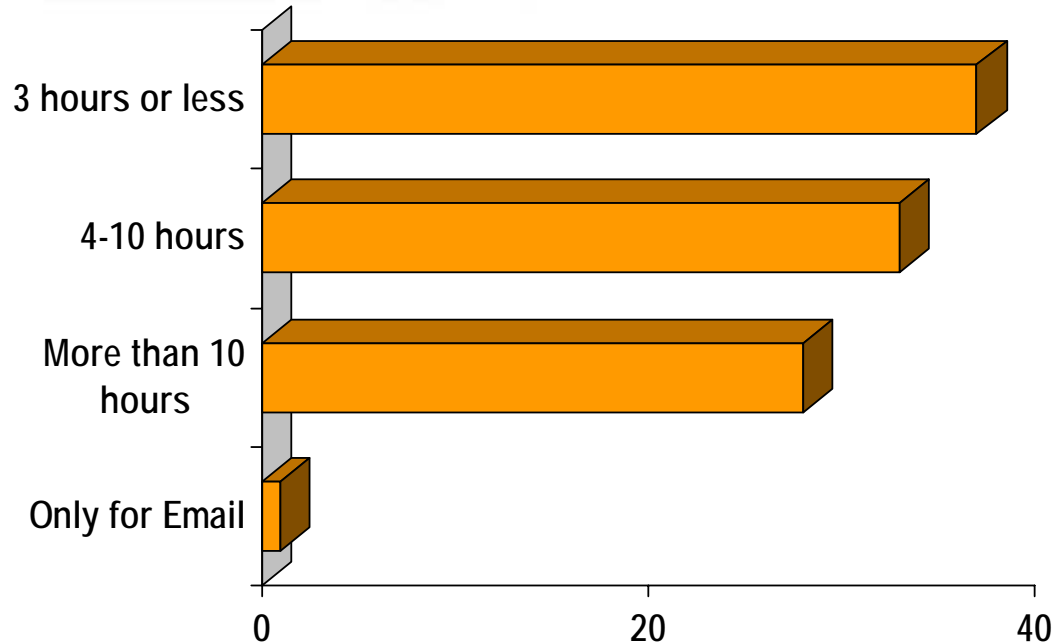
# Internet Usage

# Internet Usage

*Almost eight in ten reported using the Internet; these respondents reported spending anywhere from 3 hours or less to more than 10 hours a week online.*



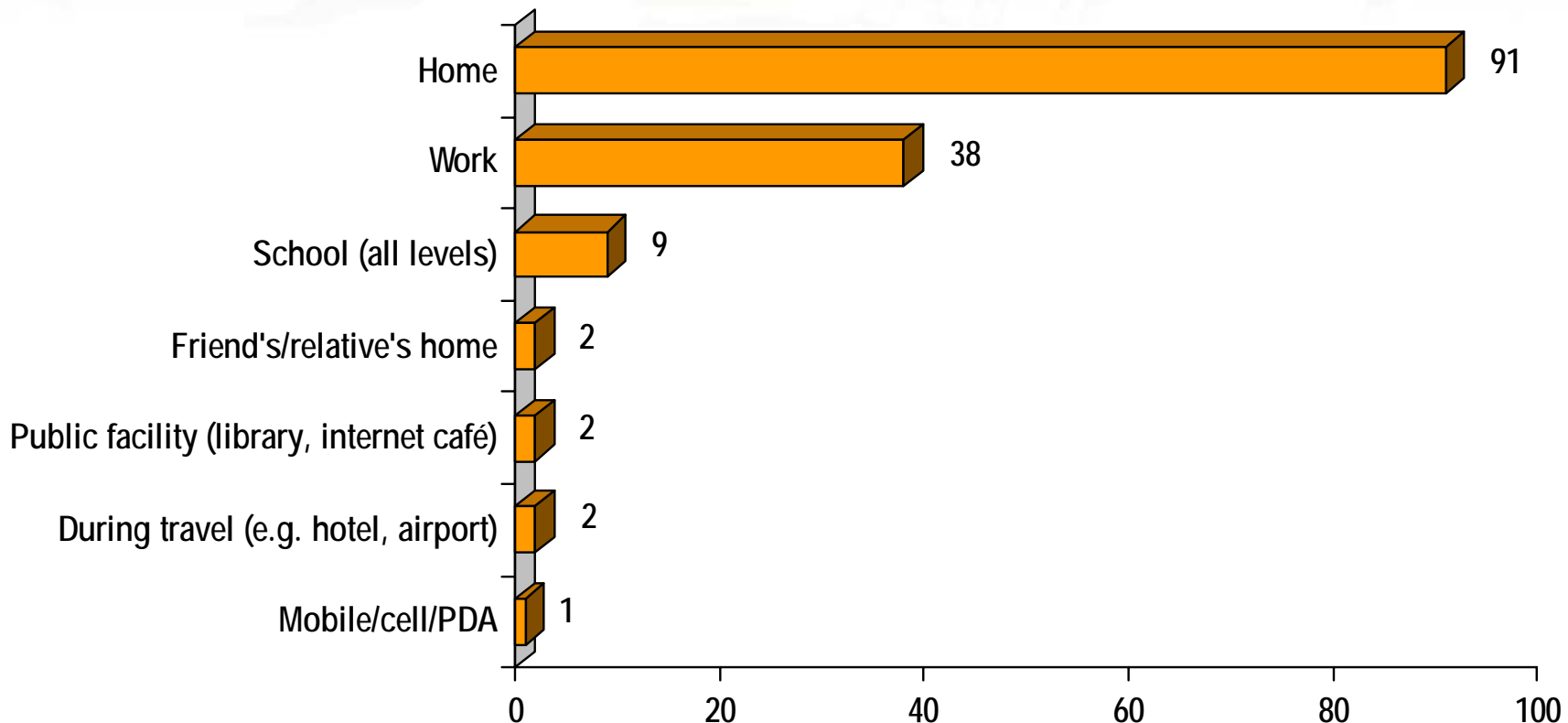
Base = 1,718; all phone respondents



Base: 1,314; all phone respondents who use the Internet (including those who use it for email only)

# Internet Access – Locations

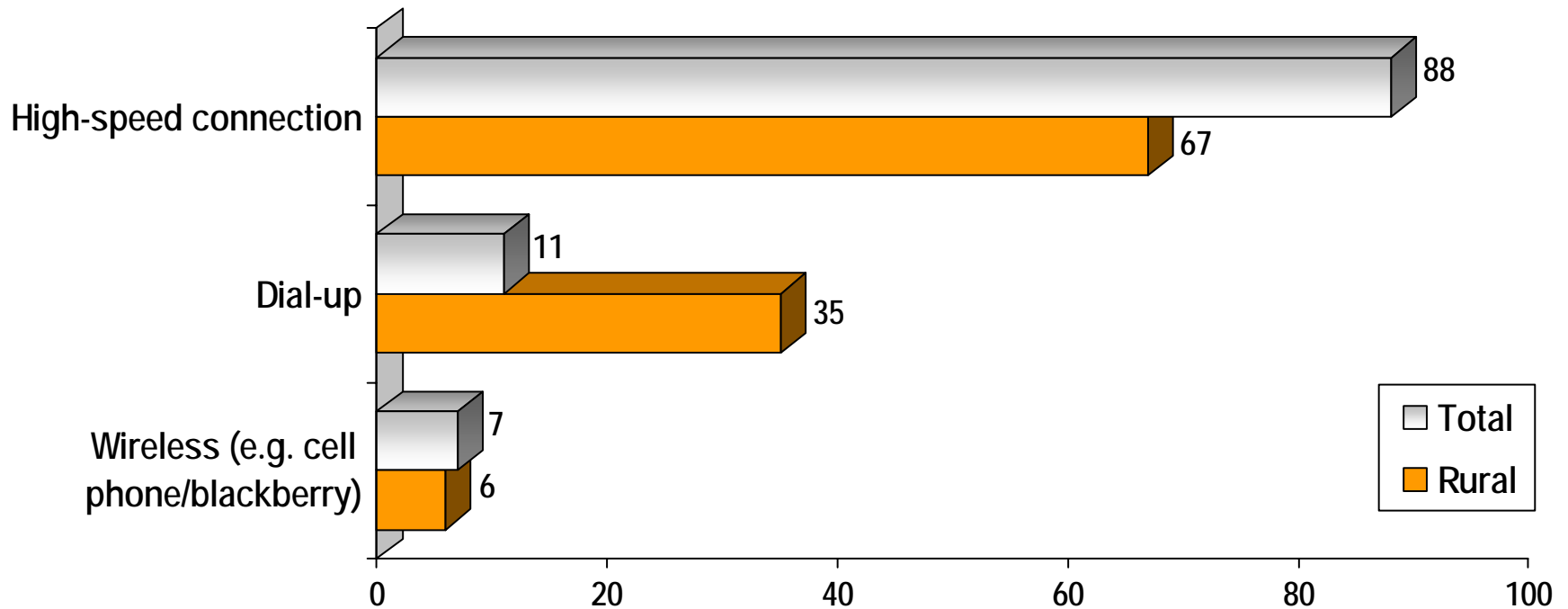
*Almost all Internet users reported having Internet access at home; many also accessed it at work. (Multiple responses accepted)*



Base = 1,292; phone respondents who use the Internet  
(excluding those who use it only for email)

# Internet Access – Methods

*A strong majority of Internet users reported using a high-speed Internet connection to go online. Significantly more rural residents reported using a dial-up connection. (Multiple responses accepted)*

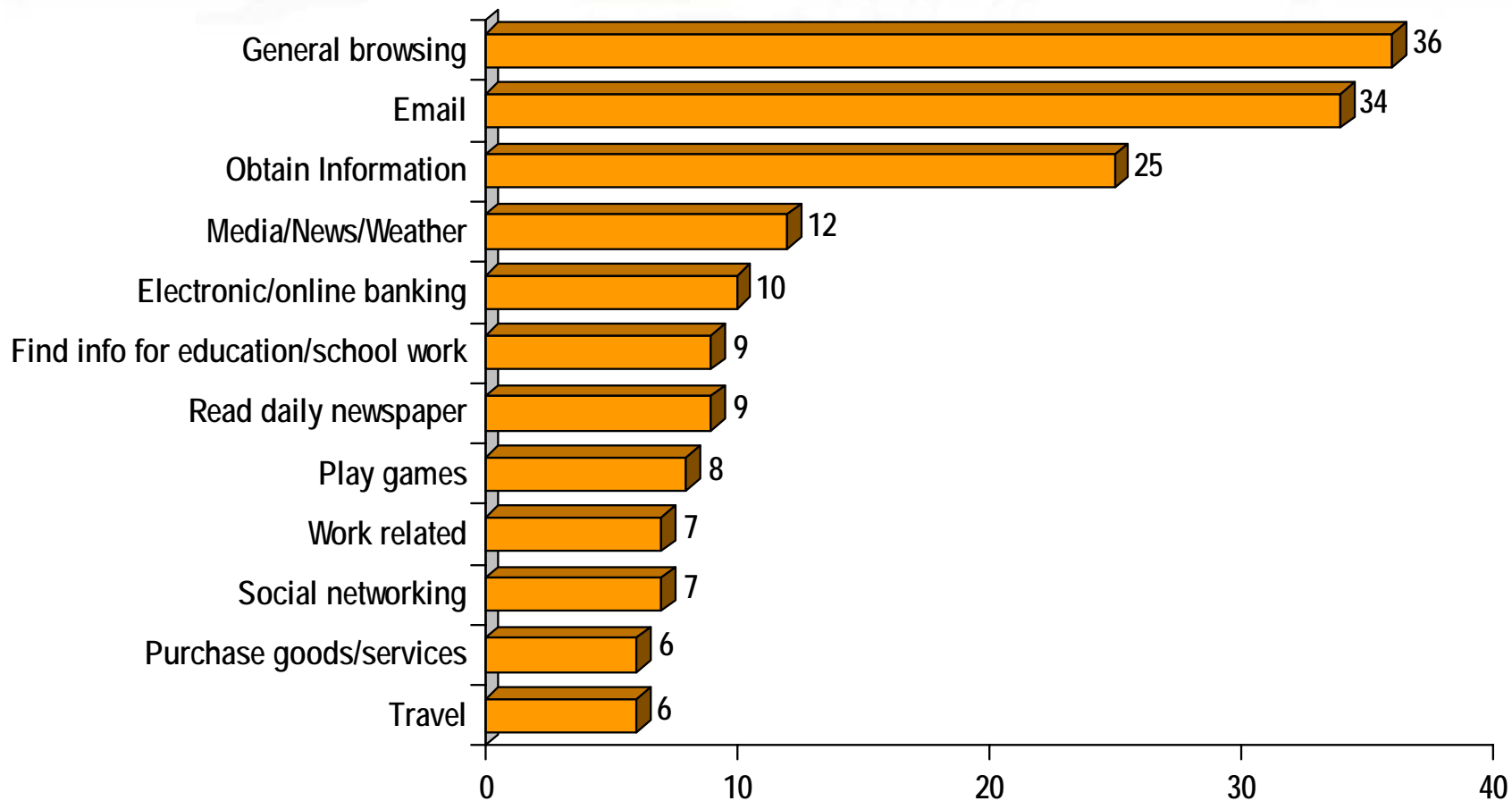


Base = 1,292; phone respondents who use the Internet  
(excluding those who use it only for email)

# Online Activities

*Internet users engaged in a wide variety of online activities, including communicating, information seeking and financial-related activities.*

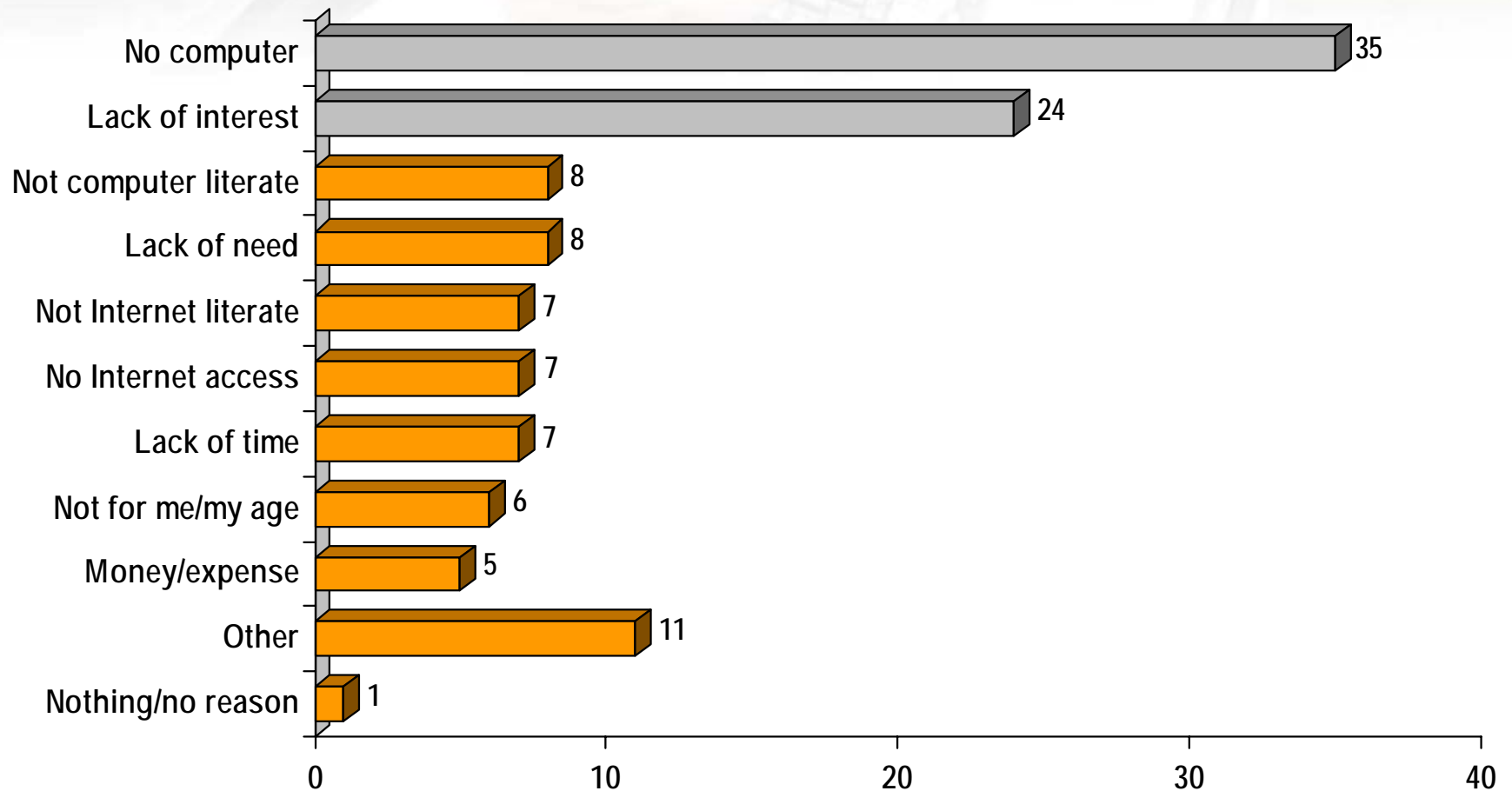
*(Multiple responses accepted, Top-of-mind question)*



Base = 1,292; phone respondents who use the Internet  
*(excluding those who use it only for email)*

# Internet Non-Users

*No computer, lack of interest were the top reasons given by those one in five Canadians who were not using the Internet.*



Up to three responses accepted

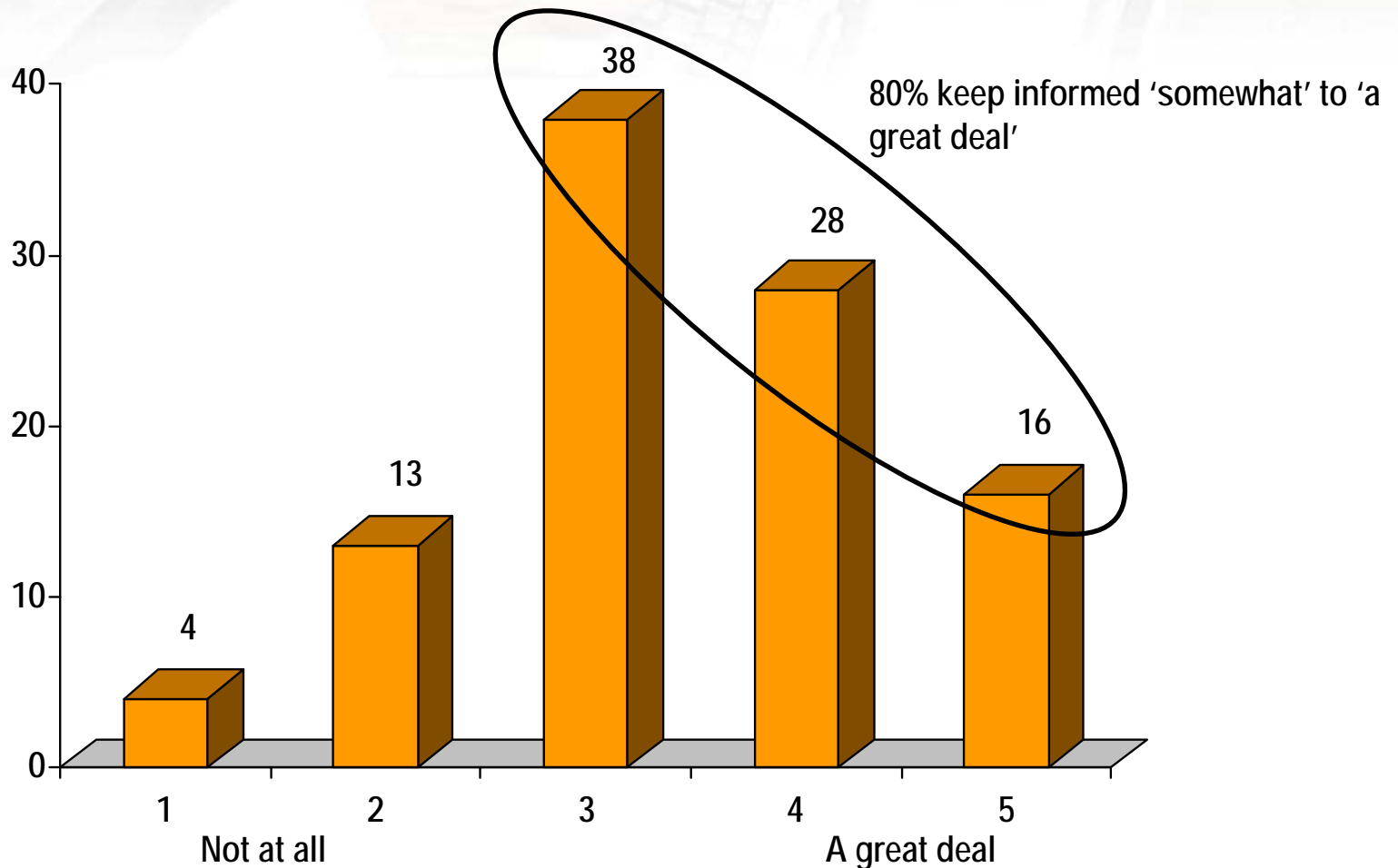
Base = 426; phone respondents who do not use the Internet



# Interactions with the GC

# Extent Informed of GC News/Information

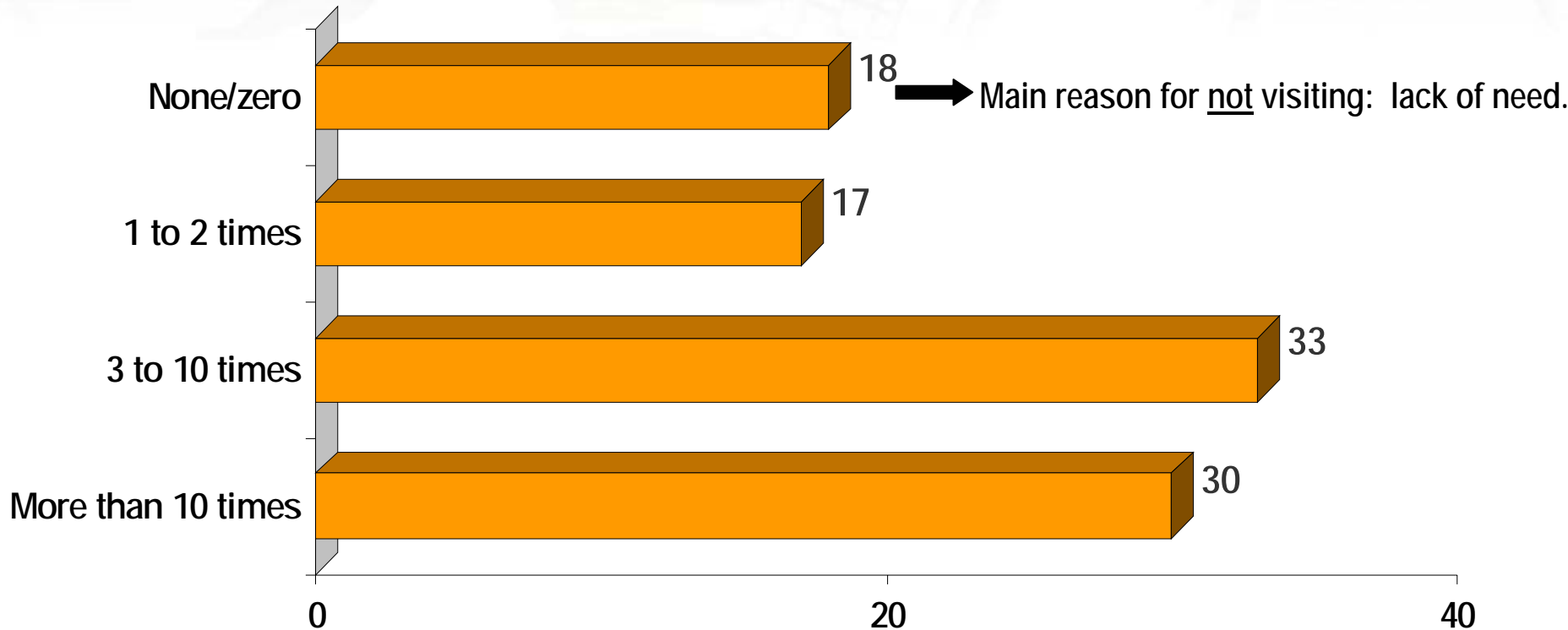
*A large majority of Internet users reported keeping informed about the GC in terms of news and information. (All media, including traditional sources)*



Base = 1,292; phone respondents who use the Internet  
(*excluding* those who use it only for email)

# Frequency of Visiting GC Websites

*More than eight in ten Internet users reported visiting GC websites more than once in the last year.*



Base = 1,292; phone respondents who use the Internet  
(excluding those who use it only for email)

# GC Website Activities

*Respondents from the phone survey reportedly visited GC websites for the same top five reasons as those from the online panel. (Multiple responses accepted)*

Reason	Telephone *	Online **
	%	%
Obtained general/background information	50	85
Obtained information/form/publication	24	74
Employment-related activities	18	84
Obtained answer to specific question	12	62
Got tax form/information	10	48

\* In the telephone survey, this was a “top of mind” question.

\*\* In the online survey, responses were selected from a list.

Base = 1,049 phone respondents (those who use the Internet and who visited GC sites in past year)

Base = 2,619 online respondents (who were all recruited from GC sites)

A photograph of a person's hands using a laptop. The person is wearing a grey suit jacket and a white shirt. The laptop screen shows a webpage with a profile picture and some text. A semi-transparent white horizontal bar is overlaid across the middle of the image, serving as a background for the title.

# Awareness & use of Web 2.0 Applications

# Awareness of Web 2.0 Applications

*Awareness of many Web 2.0 applications was high.  
Canadians 16-24 years reported higher awareness levels.*

Application	Telephone		Online
	Total %	Web Gen % (16-24 yrs)	Total %
Message boards, chat rooms, etc.	80	85	74
YouTube	78	94	83
Social networking sites	74	95	79
Blogs	70	77	78
Wikis	57	78	73
Pod/video/webcasts	56	65	58
RSS feeds	15	17	31

NOTE: This awareness question was asked of all respondents (both phone and online), *even those who were "non-Internet users"*.

# Use of Web 2.0 Applications

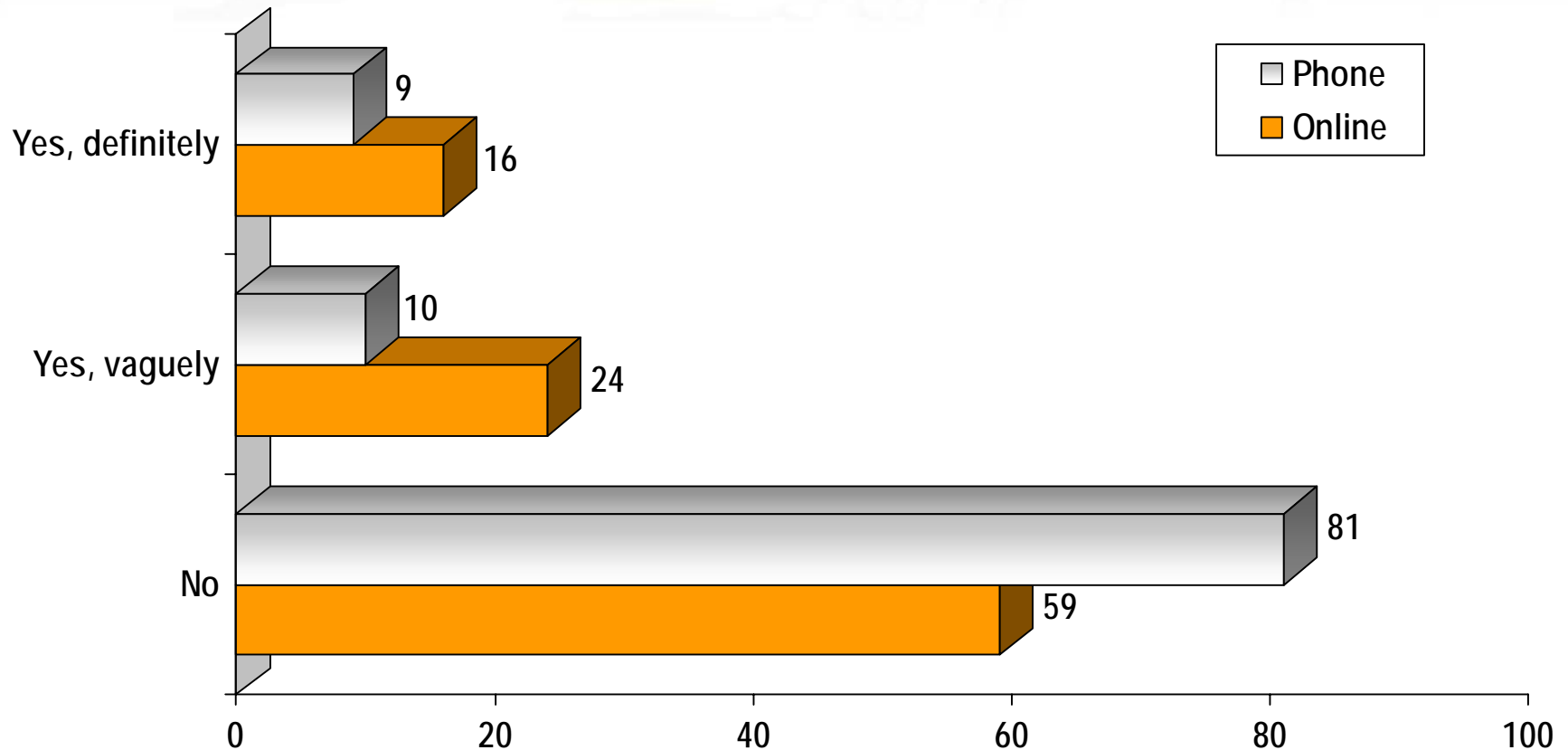
*Levels of use varied considerably, with Canadians 16-24 years significantly more likely to use certain applications.*

Application	Telephone		Online
	Total %	Web Gen % (16-24 yrs)	Total %
Message boards, chat rooms, etc.	15	39	17
YouTube	12	31	12
Social networking sites	23	55	30
Blogs	7	12	14
Wikis	4	8	8
Pod/video/webcasts	5	14	7
RSS feeds	17	11	19

\* Total reflects those Internet users who reported being aware of the specific Web 2.0 application AND reported at least daily use of that application.

# Familiarity With Term 'Web 2.0'

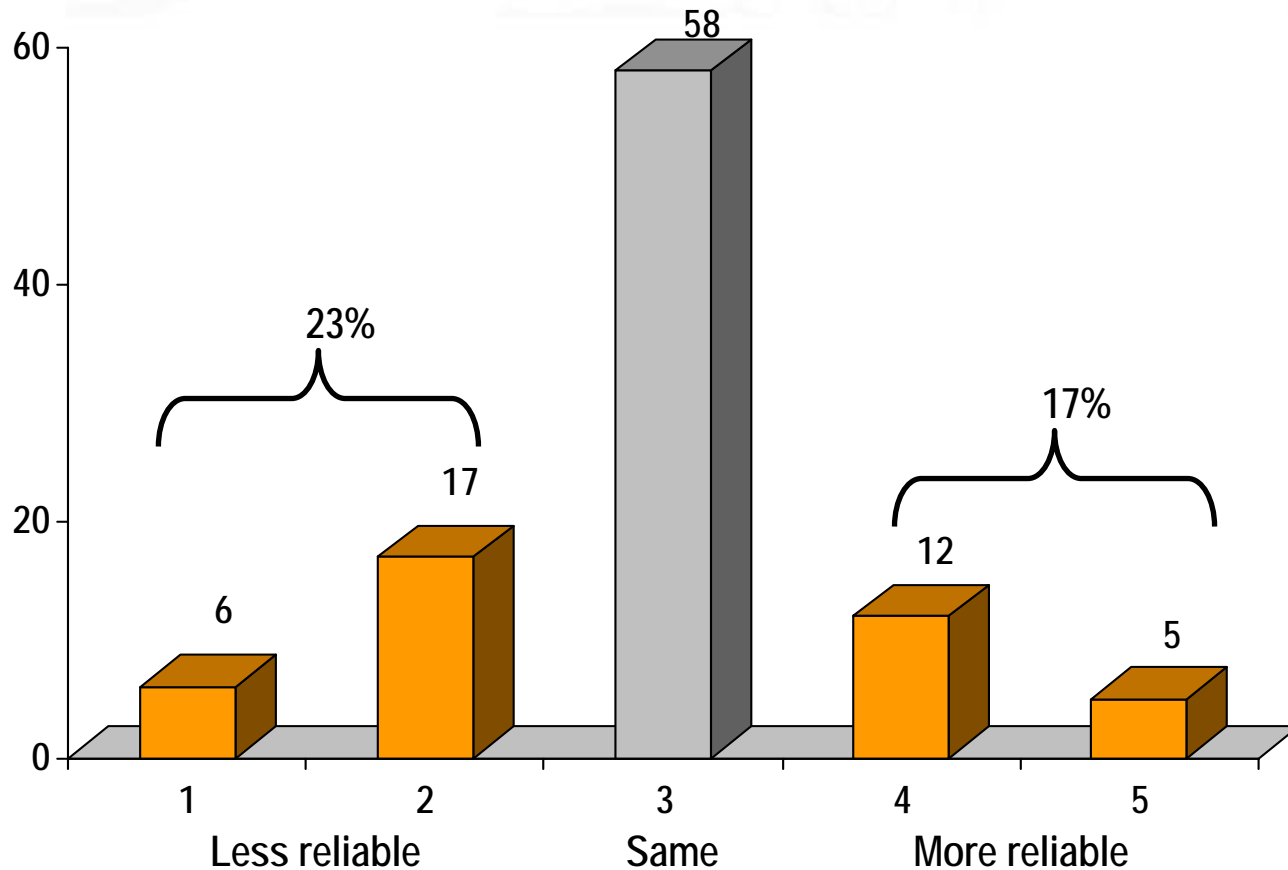
*Respondents from the online panel were more likely to express awareness of the term "Web 2.0" than telephone respondents.*



Base = 1,718; all phone respondents; and  
2,619; all online respondents

# Perceived Reliability: Internet vs. Other Media

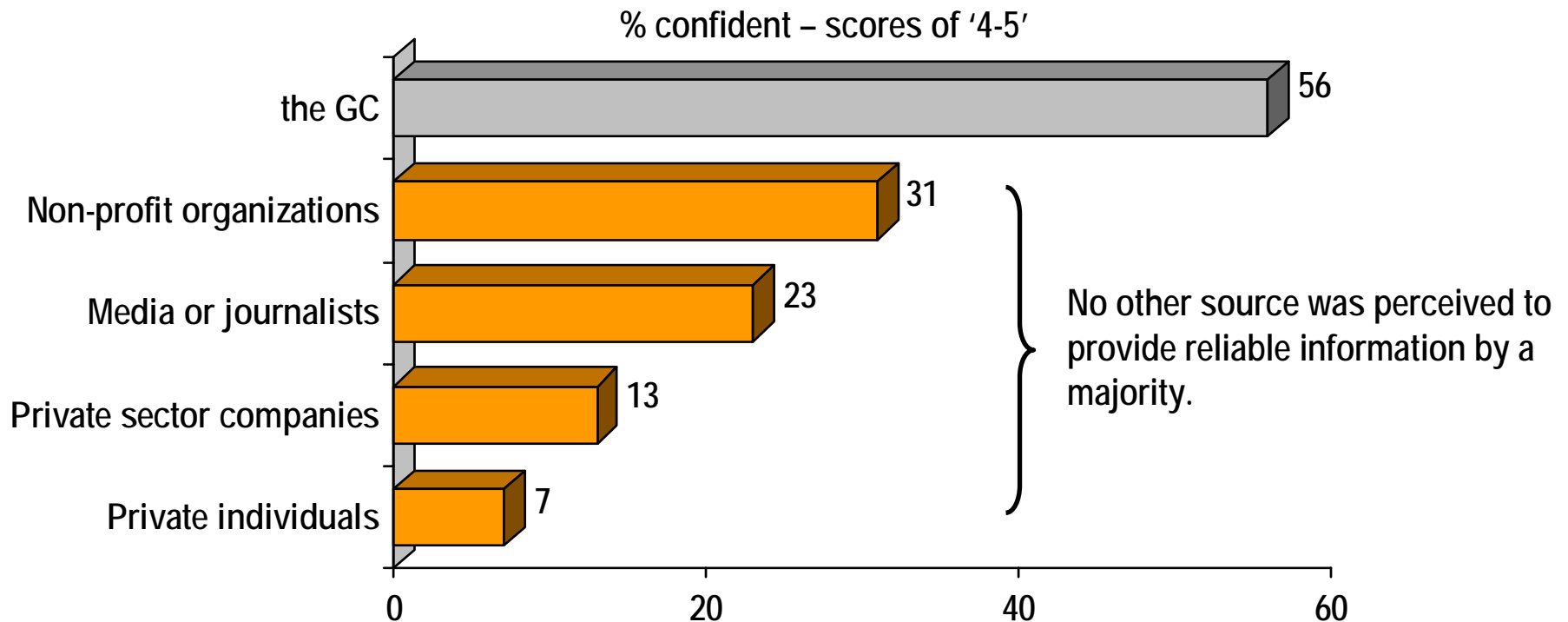
*A majority of Internet users said that information found on Internet sources would be at least as reliable as information coming from "traditional" media sources.*



Base = 1,292; phone respondents who use the Internet  
(*excluding* those who use it only for email)

# Perceived Reliability of Blogs

*More than half of telephone respondents who used the Internet (and were aware of blogs) expressed confidence in information that could be found on blogs hosted by the GC. (Prompted question, 5-point scale)*



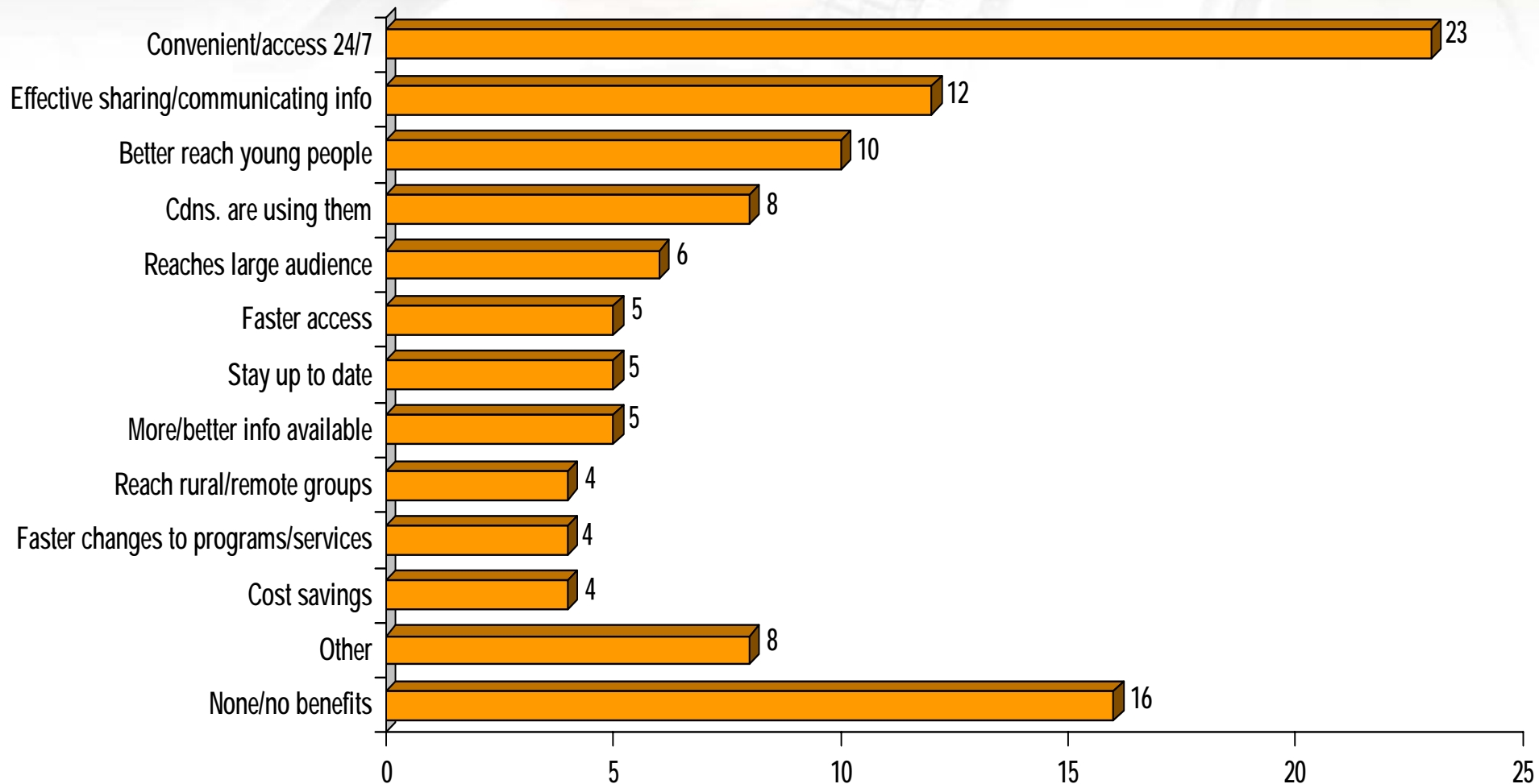
Base = 997; phone respondents who use the Internet AND are aware of blogs  
(excluding those who use it only for email)

A photograph showing a person in a grey suit jacket and white shirt using a laptop. The person's hands are on the keyboard and trackpad. The laptop screen displays a website with a profile picture and text. The image is semi-transparent and serves as a background for the title.

# Potential use of Web 2.0 Applications by the GC

# Main Benefits of GC Using Web 2.0 Applications

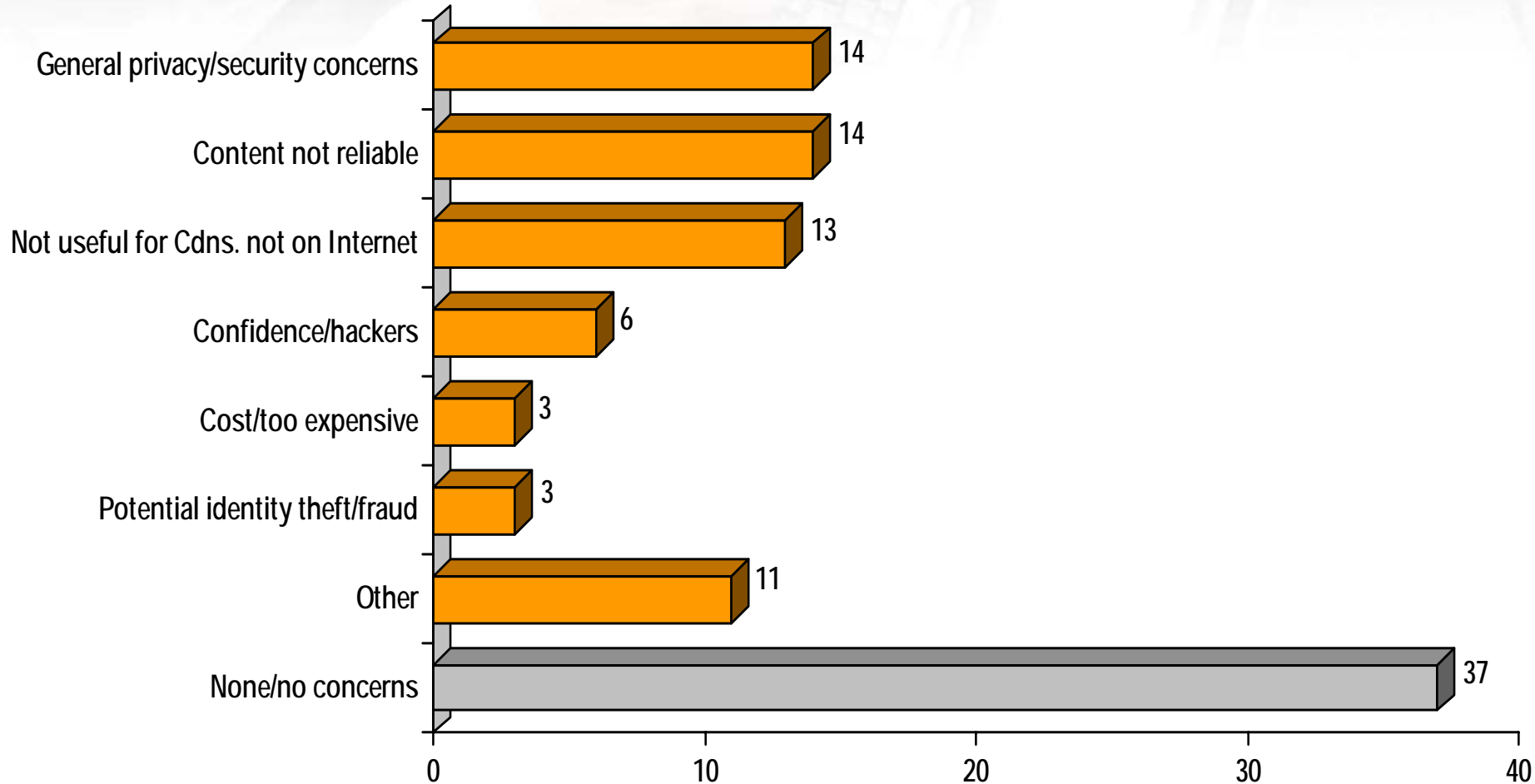
*The main perceived benefits of the GC using Web 2.0 applications were convenience and accessibility. (Multiple responses accepted)*



Base = 1,718; all phone respondents

# Concerns About GC Using Web 2.0 Applications

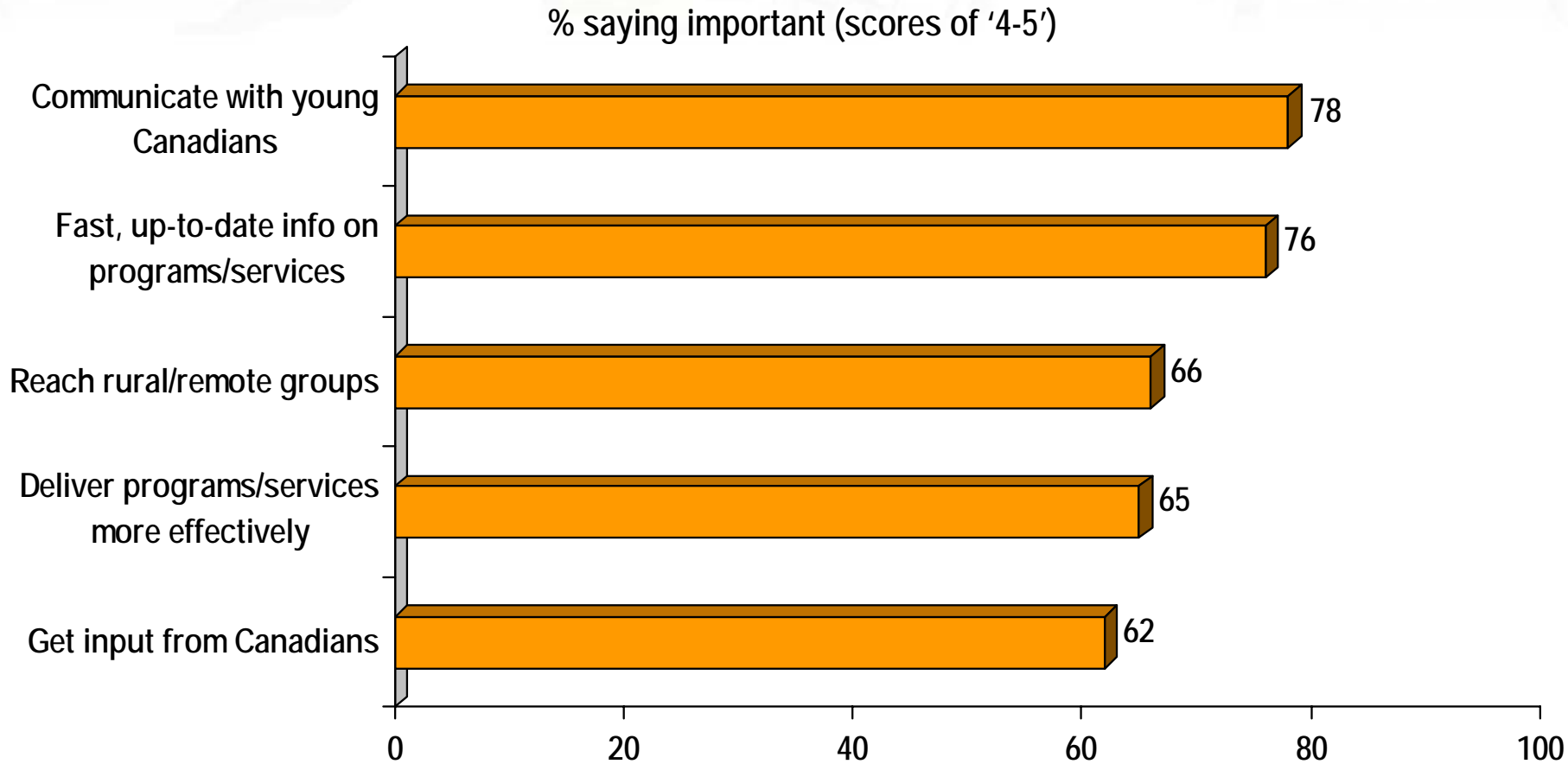
*More than one third of all telephone respondents did not foresee any concerns with the GC using Web 2.0 applications. (Multiple responses accepted, Top-of-mind question)*



Base = 1,718; all phone respondents

# Reasons for GC to Use Web 2.0 Applications

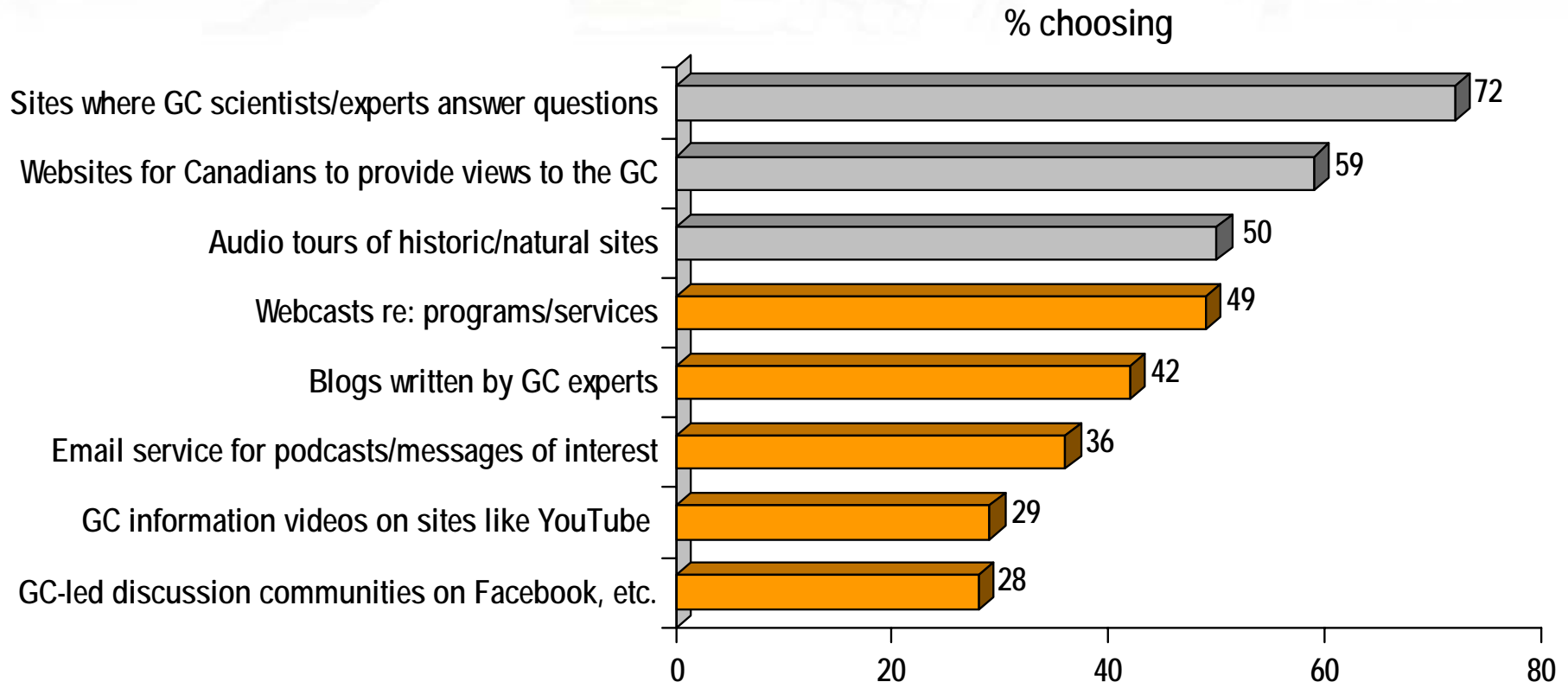
*Telephone respondents saw as important all of the potential reasons presented for the GC to use Web 2.0 applications. (Prompted question, 5-point scale)*



Base = 1,718; all phone respondents

# Specific Ways the GC Could Use Web 2.0

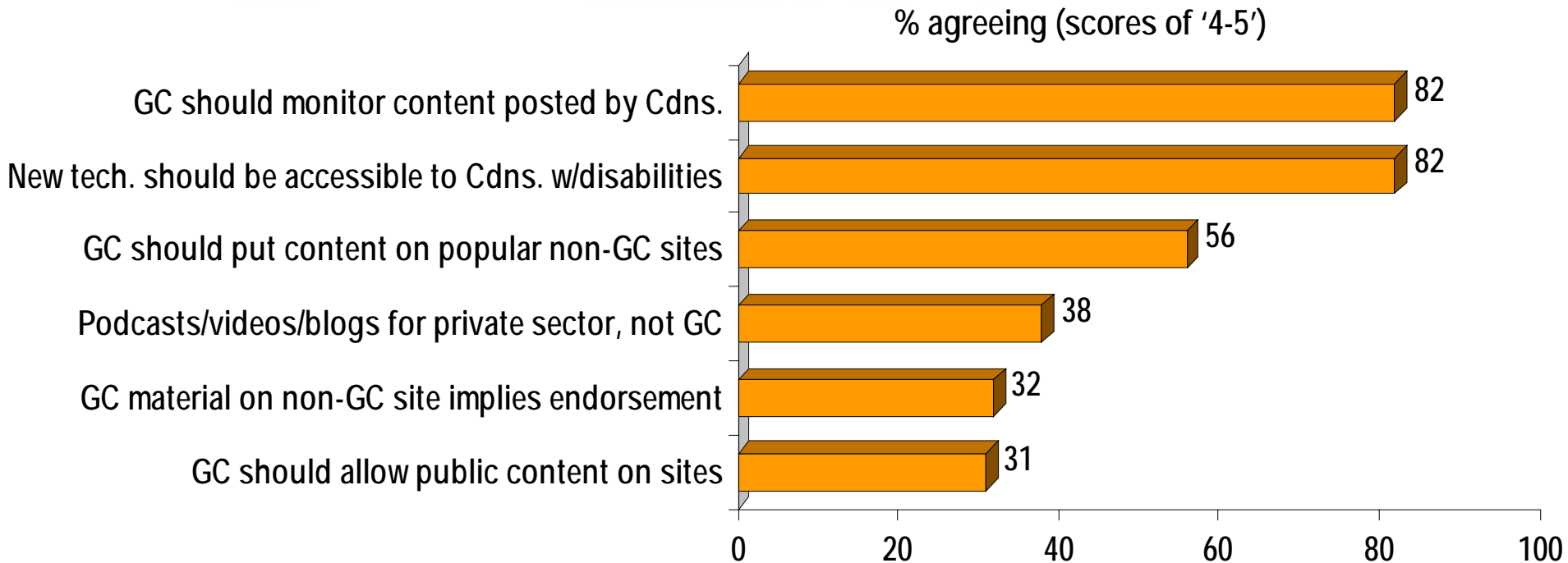
*Internet users gave highest rankings to sites where GC scientists or experts could answer questions, and sites where citizens could provide their views to the GC.  
(Prompted question, Paired choice)*



Base = 1,292; phone respondents who use Internet  
(excluding those who use it only for email)

# How GC Should Manage its Use of Web 2.0

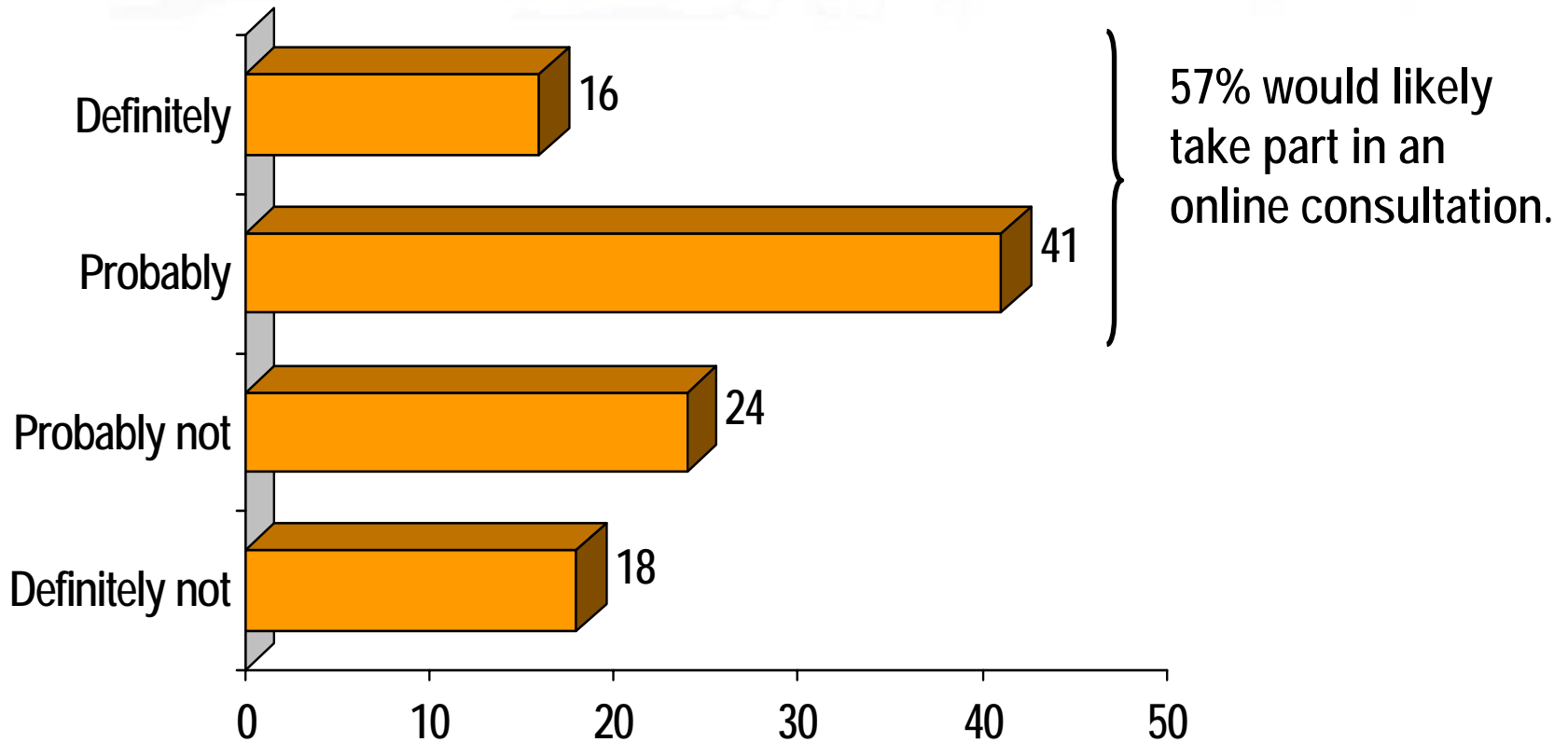
*Strong majorities agreed that the GC should monitor content posted on GC websites, and ensure accessibility to Canadians with disabilities.  
(Prompted question, 5-point scale)*



Base = 1,292; phone respondents who use Internet  
(excluding those who use it only for email)

# Interest in Online Public Consultation

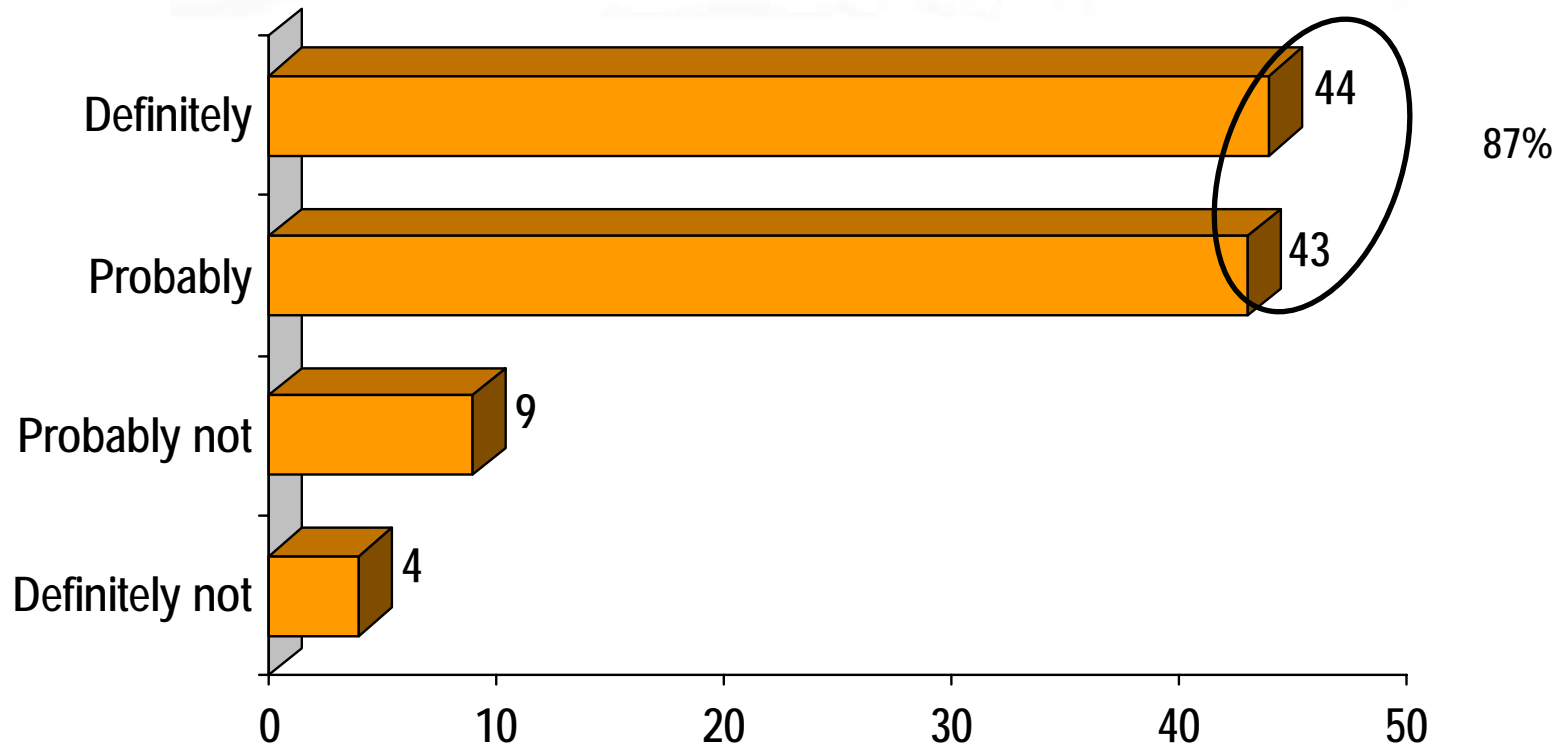
*A majority of Internet users said they would be interested in taking part in an online public consultation on a GC website.*



Base = 1,292; phone respondents who use Internet  
(excluding those who use it only for email)

# GC Investment in Web 2.0 Applications

*A strong majority of telephone respondents agreed that the GC should invest in Web 2.0 applications.*



Base = 1,718; all phone respondents



# Conclusions & Implications

# Conclusions

**Canadian public is open to the GC investing in and using Web 2.0 applications in its interactions with Canadians.**

- There was widespread support for the GC investing in Web 2.0 applications, support that cut across all groups, *regardless of level of Internet use*.

**Canadians identify numerous reasons for the GC to adopt Web 2.0, including:**

- Being more responsive
- Being less remote
- Keeping up-to-date with new technologies.

**Specific ways for the GC to start using Web 2.0 include:**

- Considerable support for online public consultations.
- Interest in GC websites where scientists or experts can answer questions
- Interest in GC websites where Canadians can provide their views on specific topics.

**Privacy, security and reliability concerns will need to be addressed.**

# Conclusions (cont'd)

The GC use of these new Internet-based applications will not necessarily be an opportunity for cost-savings, because Canadians will use these applications in addition to traditional communications and service delivery channels.

- It is not realistic to expect that Canadians will locate Web 2.0-based government content without it being well marketed.
- Canadians felt that Web 2.0 applications should complement and supplement – *but not replace* – traditional GC communications and service delivery channels.

While many Canadians are aware of most of the Web 2.0 applications, fewer are actually *using* them on a regular basis.

Internet-based applications represent an opportunity for creativity in the GC's interactions with its citizens.

Do not use the term 'Web 2.0' because there is limited awareness of it.

# Implications

**The GC will need to determine what shape Web 2.0 adoption should take.**

- Some of these new technologies are embraced more widely than others: YouTube, Facebook, message boards/chat lines are most likely to be used; Wikis and RSS feeds are least likely to be used.

**The GC will need to ensure that adoption of Web 2.0 results in applications that are easy to use – and accessible to all Canadians.**

- Consideration must always be given to those Canadians who are *not* online, or who are less skilled using the Internet.
- There was also strong support expressed for ensuring these technologies are accessible to Canadians with disabilities.

**The GC will need to watch the line between information sharing and recreation.**

- There is already a high level of trust that exists in the minds of Canadians vis-à-vis the GC presence on the Internet.
- Social networking sites and other Web 2.0 applications are often used for entertainment and recreation.

# Implications (cont'd)

The GC should adopt Web 2.0 applications where it makes sense to do so to improve communications and service delivery.

- This approach should be based on a sound analysis matching the right audience with the right subject matter *and* the right medium.
- People will judge the suitability of the places on the Internet the GC decides to use to communicate with Canadians.

A repositioning of current GC policies, directives and guidelines is needed to address current gaps, and to ensure that the GC can encompass Web 2.0 applications in its suite of tools for interacting with Canadians.

- Communications Policy
- Information management
- IT capacity
- Employee accessibility
- Privacy
- Horizontal management
- Official languages...

The GC will nevertheless need to invest resources and dedicate policy work to this emerging form of media as it is an integral part of the future of the Web.

# Reports and data sets available on request

All of the final reports related to this project will be filed with Library and Archives Canada as of May 2008 and can be found

at [www.porr-ropp.gc.ca](http://www.porr-ropp.gc.ca).

*Search for project POR-130-07.*

For executive summaries and any of the data sets related to this project, please contact Agriculture and Agri-food Canada

at [por-rop@agr.gc.ca](mailto:por-rop@agr.gc.ca).

For additional research and secondary analysis conducted on this project, please contact the Public Opinion Research Directorate of Public Works and Government Services Canada

at [por-rop@pwgsc.gc.ca](mailto:por-rop@pwgsc.gc.ca).

The following companies were contracted as part of this study:

Phoenix Strategic Perspectives Inc.,

Phase V, EKOS Research Associates, and Arcturus Solutions



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