

The Rethinking the Information Highway 2007-08 Study

Background

EKOS' *Rethinking the Information Highway* study grew out of a need to better understand how information and communication technologies (ICTs) were reshaping the environment governments and companies were operating within. The study's first findings – undertaken at a time when ICTs and their prospective uses were in their infancy – date back to 1997. Now in its eighth edition and almost 25 surveys later, the study is one of the largest and longest running studies in this area in Canada today. Given its big-picture focus on the full range of issues relating to technology usage, such as the interaction between traditional and electronic service delivery channels, as well as privacy and security-related issues, *Rethinking the Information Highway* remains one of the most relied upon sources for senior decision-makers who are tasked with guiding their organization through what continues to be a changing environment.

As ICTs, led by the Internet, have entered the mainstream, most Canadians have become increasingly experienced and knowledgeable about them. Many end-users today are acutely aware of the channels best suiting their needs. Against this backdrop, governments and the private sector have continued to transform their service delivery networks. With the emphasis on technology being viewed as a move in the right direction and the growing readiness on the public's part to embrace e-channels, there is increased pressure on governments to keep offering citizens a well designed and integrated multiple channel environment. At this point, the public increasingly knows what it wants to use the e-channels for and what they want to do using other channels. More and more, this means meeting end-user demands by refining existing e-channels and developing new e-channels for added convenience.

With prices dropping in real terms over the past decade, a growing number of Canadians from all segments of the population continue to introduce new and increasingly sophisticated technologies into their homes.

Rising ownership of cellphones and mobile email devices is having profound effects on personal communications. Consider the rising popularity of text messaging and Mobile Voice over Internet Protocol, for instance. The "communications household" today is one that continues to be characterized by a need for speed, efficiency and easy usability. With that in mind, it is not surprising that Canadians are gravitating towards high-speed Internet access, multiple PCs and wireless networks in growing numbers than in years past.

Another key trend in this area is the extent to which health care and ICTs have become intertwined on numerous fronts. The Internet continues to play a greater and greater role in facilitating access to pertinent health information for Canadians, especially with respect to information concerning specific diseases. Better informed patients are improving their relationships with healthcare providers, as they are approaching healthcare practitioners with more probing questions. Internet websites fall second only to print media as a primary source for health information. Looking forward, however, there is considerable room for further growth, and we are clearly still very much in the early days of this transformation.

Over the years, a number of lessons have been learned in relation to improving usability and promoting use of new electronic channels. Regardless of valiant initiatives to better adapt the architecture of web-based tools, the process must remain fluid to continue meeting ever-changing needs and expectations. Additionally, certain factors limit use of web-based tools. One such factor includes unfamiliarity with existing online services. Another factor surrounds the value proposition of employing web-based tools. The benefits of e-channels over traditional channels for interaction are not always evident. This is particularly true in light of the fact that most citizens do not have the same high level of frequent contact with governments when compared, for

example, to something like their financial institution. Another limiting factor surrounds pre-held notions and stagnant attitudes related to privacy, security and technology. These factors represent ongoing challenges, which must be adequately addressed to ensure the success of different initiatives.

Despite tremendous improvement to some of the privacy and security risks around the use of ICTs, technological threats are increasingly sophisticated. Phishing and identity theft, which employ social engineering techniques, are a case in point. Not surprisingly, privacy in both the online and offline context continue to be a real issue for citizens, the public sector and the private sector alike.

This Year's Study Objectives

The 2007 study has been designed to assist senior decision makers in understanding how technology continues to shift the environment in which they are operating. The study provides subscribers with ongoing research to support their strategies and navigate the challenges presented by the later half of the decade.

The preliminary themes are as follows:

ICT Usage, Access, Content:

- Internet/technology uptake, usage and access trends – What is becoming most important to Canadians versus what is being left behind and why?
- Communications household – marketplace trends for Internet access, telephony and television
- Cultural information – impact of the Internet

The Service Delivery Environment:

- Broad perceptions of the service delivery environment – awareness, improvements, shifting expectations

- Evolution of channel usage patterns – lessons learned
- Fostering uptake of online channels/existing barriers
- Personalization of online channels
- How needs and preferences of citizens are evolving
- Privacy, security and service delivery – the implications of privacy and security concerns for the provision of government services/streamlining initiatives

Privacy and Security:

- Shift in the privacy and security landscape
- Perceptions of government, business and financial institution information practices
- Identity theft and fraud – victimization, perceived threats, behaviour in response
- Privacy laws – awareness and perceived impact on government and private sector information practices
- Trust and confidence – degree of trust and confidence in public and private sector organizations

Technology and Health Care:

- Online health information – propensity and trends in the search for online health information, trusted sources, and implications for health care providers
- Online health activities – online consultations and doctor-patient relationships, electronic pharmacies
- Electronic Health Records – shifting perceptions and comfort levels

Personal Finance and the Electronic Marketplace:

- Financial services – changes in service channel usage patterns, lessons learned relevant to public sector
- Electronic bill payment and presentment – consumer perception and uptake
- E-consumers – perceptions and emerging patterns within the developing e-marketplace

Methodology

Recognizing the need to explore issues with specific segments of the public, the study is built around large sample sizes that enable drilling down in areas not possible on other syndicated studies.

The methodology uses a panel-based design, relying on the respective strengths of telephone and mail surveys. An optional business survey will also be undertaken assuming similar participation to last year.

Benchmark survey

The first wave of research will involve a telephone survey with a random sample of up to 4,500 Canadians, aged 16 and over (depending on the number of sponsors). The national sample will be stratified along regional lines to ensure that detailed analyses can be undertaken.

Linked self-administered mail-back survey

The second wave of research will involve a mail-back survey sent to participants from the first wave agreeing to a follow-up survey.

This format has several advantages, including: the ability to collect detailed information while reducing recall errors; the ability to use more complex questions; and enabling a greater reflection on answers (particularly for open-ended questions).

Extensive follow-up procedures are used to ensure a high response rate (50 to 60 per cent in previous years).

Business survey (TBC)

Assuming similar participation as last year, the study will involve a business survey — the seventh such survey as part of the study since 1999. The methodology will involve a national stratified random telephone survey of over 1000 businesses in Canada.

Schedule

Assuming a sufficient number of subscribers to the study, the schedule will be as follows:

Phase	Timing
Wave 1	
Design	Summer 2007
Fieldwork	Late Summer/Early Fall 2007
Reporting	Fall 2007
Wave 2	
Design	Summer 2007
Fieldwork	Early Fall 2007
Reporting	Fall 2007
Business Survey (TBC)	
Design	Fall 2007
Fieldwork	Fall 2007
Reporting	Fall 2007

Costs

There are three levels of subscription:

<p>Limited Subscription</p> <p>\$15,000 (excluding GST)</p>	<p>e-version and 1 hard copy of all deliverables (citizen research)</p> <p>One custom presentation during the course of the study</p>		<p>Intended for sponsors who require an in-depth examination of their specific issues</p> <p>Privileged sponsors exert a continuous influence on the study, and are consulted on key study issues</p>
<p>Core Subscription</p> <p>\$35,000 (excluding GST)</p>	<p>e-version and 4 hard copies of all deliverables (citizen <u>and</u> business research)</p> <p>Opportunity to define, jointly with EKOS, 5 special purpose questions* on either the benchmark or mail-back surveys</p> <p>2 customized presentations highlighting key findings for their organization</p>	<p>Privileged Subscription</p> <p>\$60,000 (excluding GST)</p>	<p>e-version and 8 hard copies of all deliverables (citizen <u>and</u> business research)</p> <p>Opportunity to define, jointly with EKOS, 10 special purpose questions* on benchmark, mail-back or business surveys</p> <p>2 customized presentations after <u>each</u> major phase of the study, highlighting key findings for their organization (up to 4 over the course of the study)</p>

Customized services including additional analysis, reporting and presentations are available to study sponsors. Costs are determined based on the scope of the work.

*Client questions are based 2,000 cases on the benchmark survey (or 1,000 cases on the business survey) and closed ended.

** Privileged subscribers can add additional questions at a price of \$900 per closed ended question based on a sample of 1,000 cases (rather than our standard \$1,000/1,000 cases). Open ended questions can be added at a cost of \$1,250 on a sample of 1,000 cases (rather than our standard \$1,500).

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