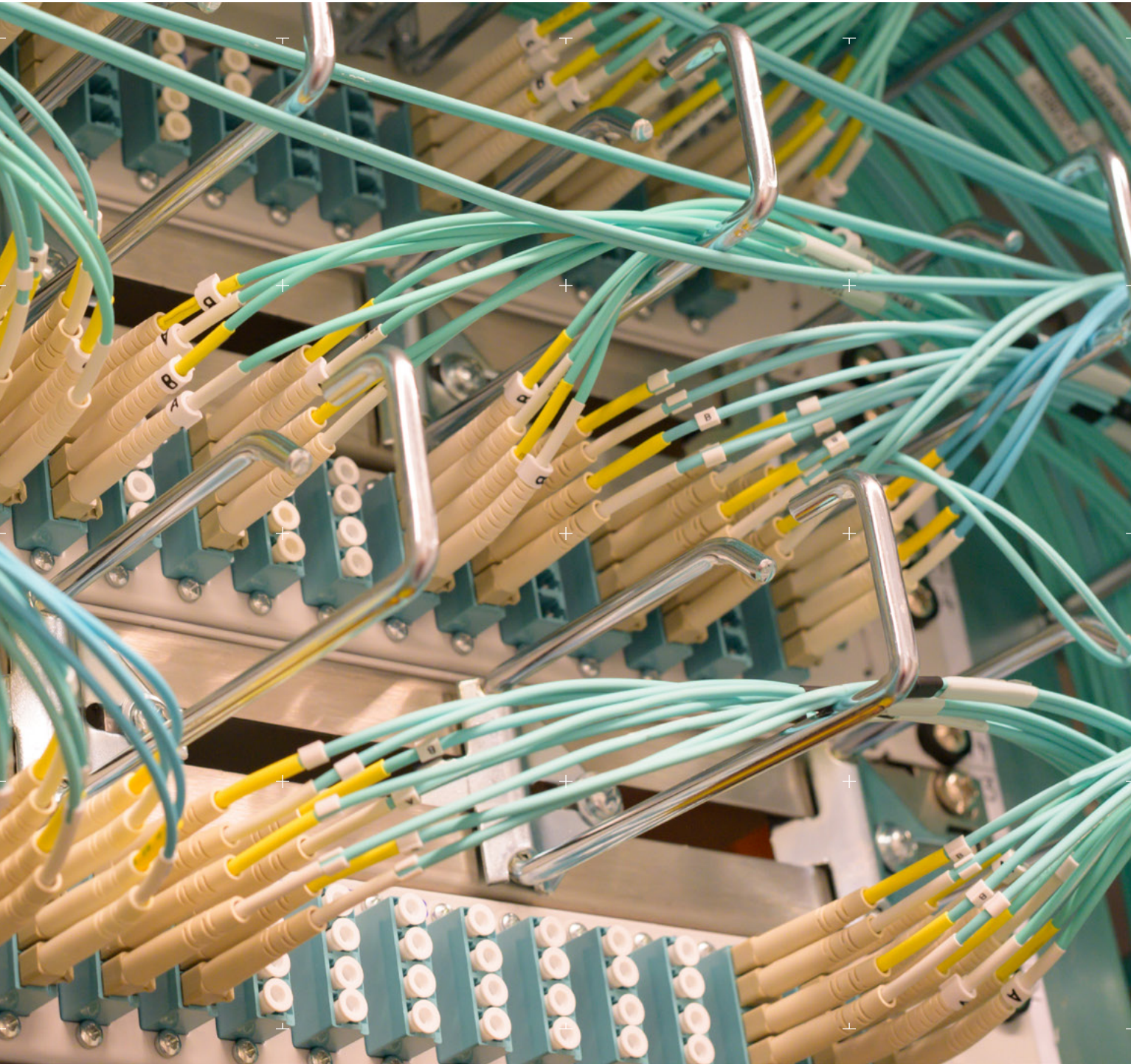




Data Supplement





To create a more digitally equitable Canada by 2030, we must act now.

This requires understanding the current state of digital equity and making bold changes today for the sectors of society that are more likely to fall behind.

To understand Canada's current state of digital equity, Deloitte analyzed more than 50 data points from secondary data sources, including Statistics Canada and the Organisation of Economic Co-operation and Development (OECD). Particular attention was paid to specific population-level statistics (where available) as well as comparisons with peer countries.

1. Access

† *Do people and organizations have the digital infrastructure, devices, and content they need to interact with the digital world?*

2. Participation

† *Do people and organizations have the ability to engage with, learn from, and develop new digital technology?*

3. Ecosystem

† *Do we have a digital and policy ecosystem that enables people and organizations to succeed in the digital world?*

→ **TO UNDERSTAND
A COUNTRY'S STATE OF DIGITAL EQUITY,
THREE COMPONENTS MUST BE ASSESSED.**

- ♦ *In measuring these components, we want to understand how specific demographic groups perform compared to Canada's overall performance.*
- ♦ *The metrics were chosen to provide a contrast between overall statistics vs. population-level statistics. This enabled a clearer view of populations that tend to be disadvantaged.*

THE ANALYSIS OF SECONDARY DATA SOURCES FOUND A TROUBLING LACK OF DATA WITH WHICH TO ASSESS THE STATE OF CANADA'S DIGITAL EQUITY.

	MEASURE	TYPE	KEY DATA INDICATORS
<ul style="list-style-type: none"> → Canadian data incomplete, particularly for population groups → Little to no Canadian data available 	ACCESS	USAGE	→ Internet use by gender, race, age, income
		QUALITY	→ Internet speeds available/accessible by gender, race, age, income → Internet speeds available/accessible by Canadian businesses by size and other characteristics
		INFRASTRUCTURE	→ Broadband subscriptions available/accessible by gender, race, age, income Broadband subscriptions for Canadian businesses, by size and business characteristics
		PRICE	Broadband rates (adjusted for PPP) → % of income spent by household on internet by gender, race, age, income
		ACCESSIBILITY	Web accessibility score by size and industry
	PARTICIPATION	FORMAL EDUCATION	→ ICT specialists by gender, race, age → Digital literacy scores by gender, race, age, income
		DIGITAL SKILLS	% of individuals with basic and above-basic digital skills by gender, race, age, income % of individuals at high risk of job being automated by gender, race, age, income
		TRAINING	→ % of businesses providing training to employees to build digital skills, by size of business → % of individuals accessing digital skills education
		PARTICIPATION	→ % of individuals able to access digital-enabled services (e.g., internet banking or LinkedIn for job search) by gender, race, age, income → % of businesses adopting digital technologies, by size and other characteristics
	ECOSYSTEM	POLICY AND REGULATORY ENVIRONMENT ON ACCESSIBILITY, INFRASTRUCTURE, BUSINESS, AND INDIVIDUAL PROTECTION	→ Digital evolution index → DARE index → Personal information usage/cybersecurity/safety and trust

DESPITE THE LACK OF DATA, IT'S EVIDENT CERTAIN POPULATION GROUPS ARE ALREADY FALLING BEHIND.

1. LOW-INCOME HOUSEHOLDS/INDIVIDUALS*

Canada has among the highest costs of digital access in the world, which limits the ability of people from low-income backgrounds to access the broadband, devices, and skills development needed to interact with the digital world.

3. OLDER POPULATION GROUPS

The adoption of new technology can be more difficult for older segments of the population (not just seniors but people aged 45 and up) for various reasons, including lack of skills and access to timely training.

5. RURAL POPULATIONS

Despite improvements in broadband roll-out in the last year, Canada's geography and high costs mean that digital access remains a major barrier for many rural areas.

**Note: Our qualitative discussions highlighted that persons with disabilities are also similarly disadvantaged but there is a severe lack of data, making it harder to draw any conclusions*

2. SMALL AND MEDIUM-SIZED BUSINESSES (SMEs)

Most businesses recognize the need for digital transformation and invest in data and analytics. However, most SMEs lack resources and so tend to lose out on accessing the tools and talent needed to keep up with larger businesses.

4. RACIALIZED CANADIANS

While data is not widely available, an intersectionality of data between low-income households and racialized Canadians leads us to believe there is a lack of access to digital tools and skills for this group.

6. INDIGENOUS PEOPLES

The data on Indigenous peoples paints a clear picture of a group that has less access to, and participation in, digital society. We lack detailed data, however, including statistics on the divide between on-reserve and off-reserve Indigenous peoples.

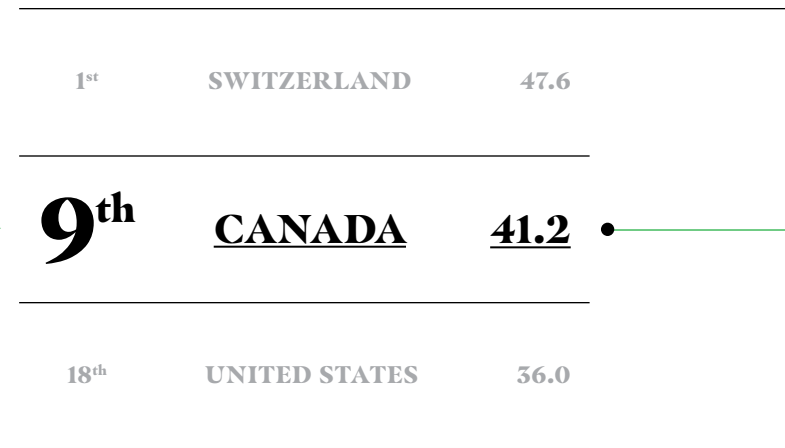
1. ACCESS

QUICK SUMMARY

- ◆ *Canada ranks high among peers in overall statistics regarding individual access—except in cost of services*
- ◆ *Cost is likely to remain the main barrier to internet access for vulnerable populations*
- ◆ *The federal government has therefore pledged to connect 98% of Canadians to high-speed internet by 2026, and all Canadians by 2030. This raises two questions: What about businesses? And, given current social and regional inequities, is this goal achievable?*

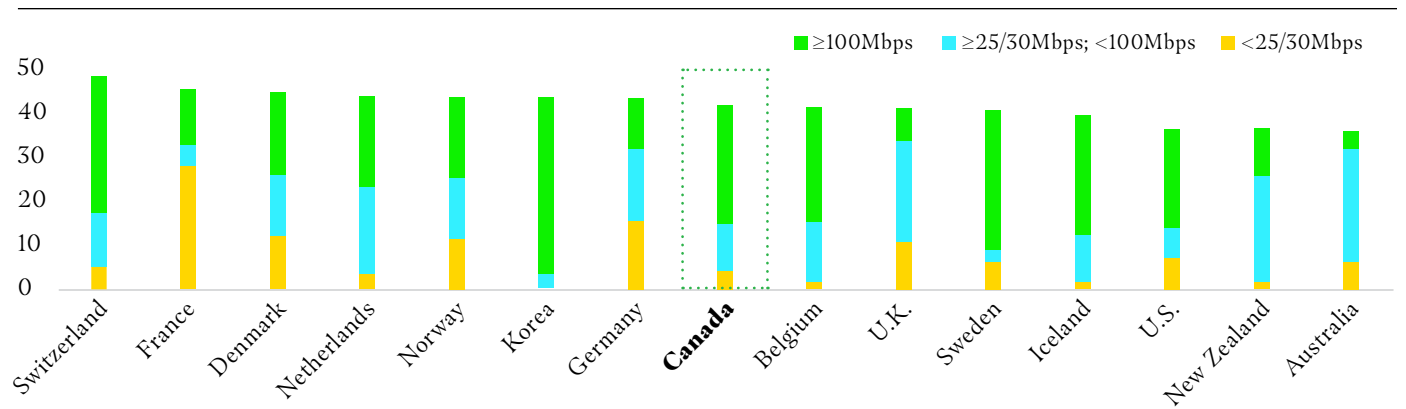
CANADA RANKS IN THE TOP 10 AMONG OECD PEERS FOR BROADBAND CONNECTIONS, BUT ACCESS TO HIGH-SPEED SERVICE DEPENDS ON LOCATION.

Number of fixed broadband subscriptions per 100 inhabitants in 36 countries (June 2020)

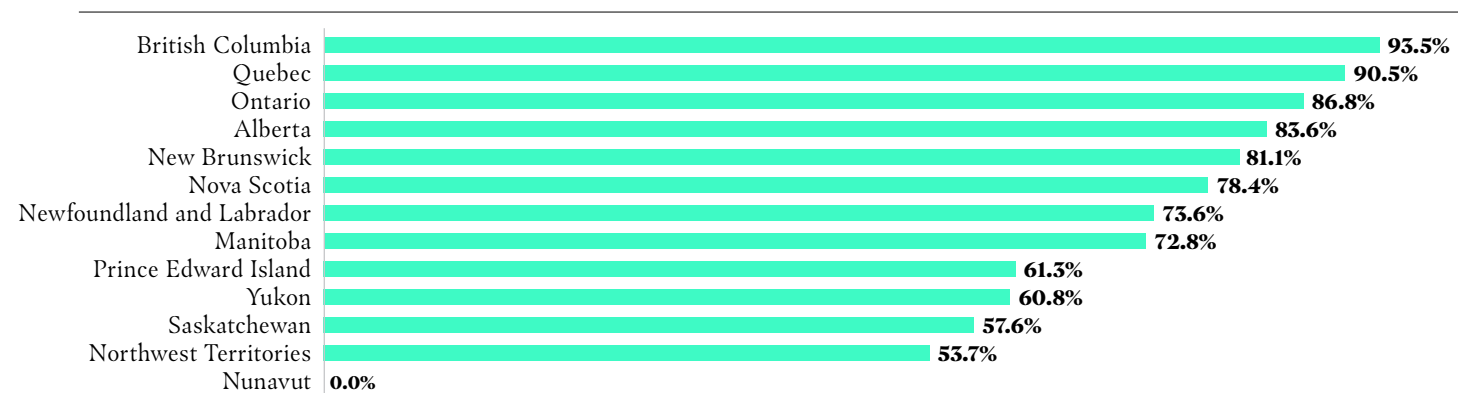


While most of the country's fixed broadband subscriptions are high-speed tiers (>100 Mbps), the service isn't available to everyone. In Nunavut, for instance, only >5 Mbps speeds are widely available.

Fixed broadband subscriptions per 100 inhabitants, per speed tier (June 2020)



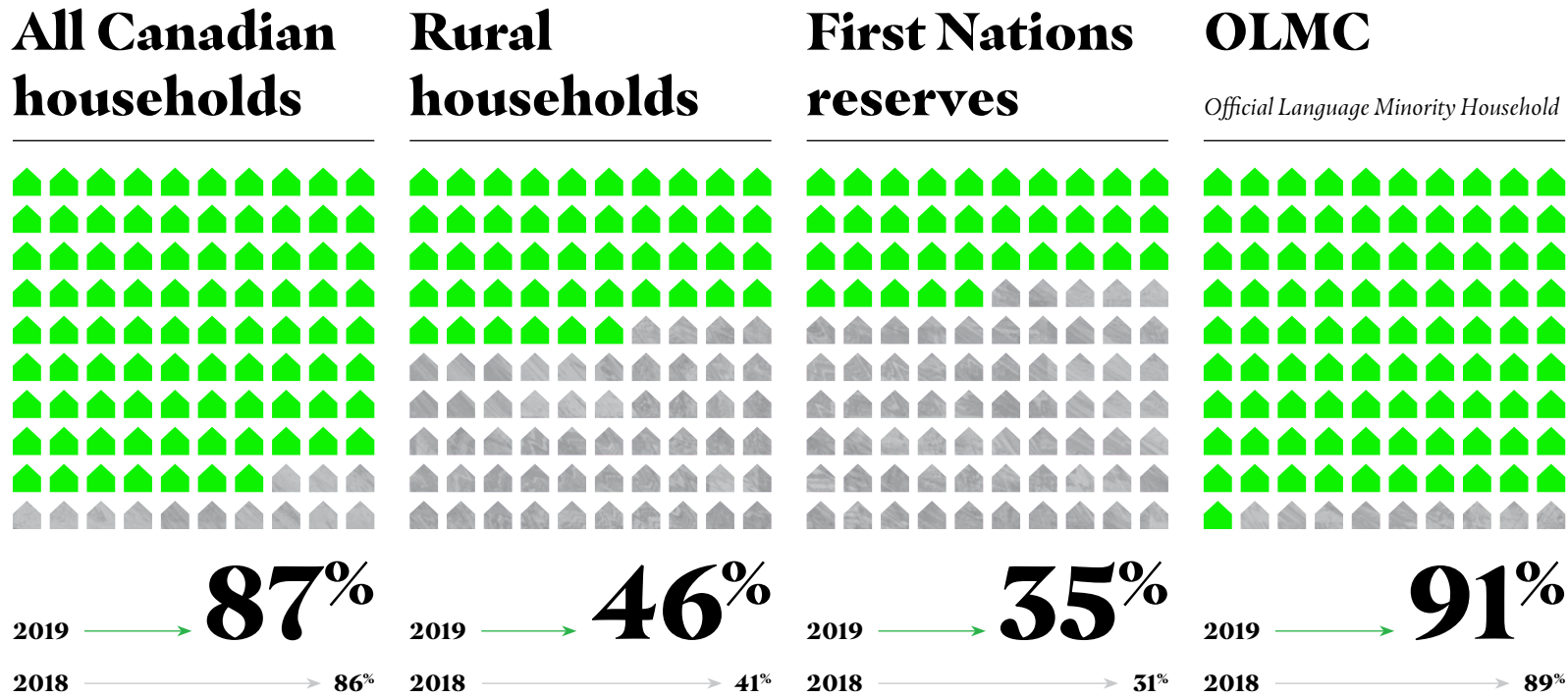
Broadband service availability, by province/territory, % of households with >100 Mbps speed (2019)



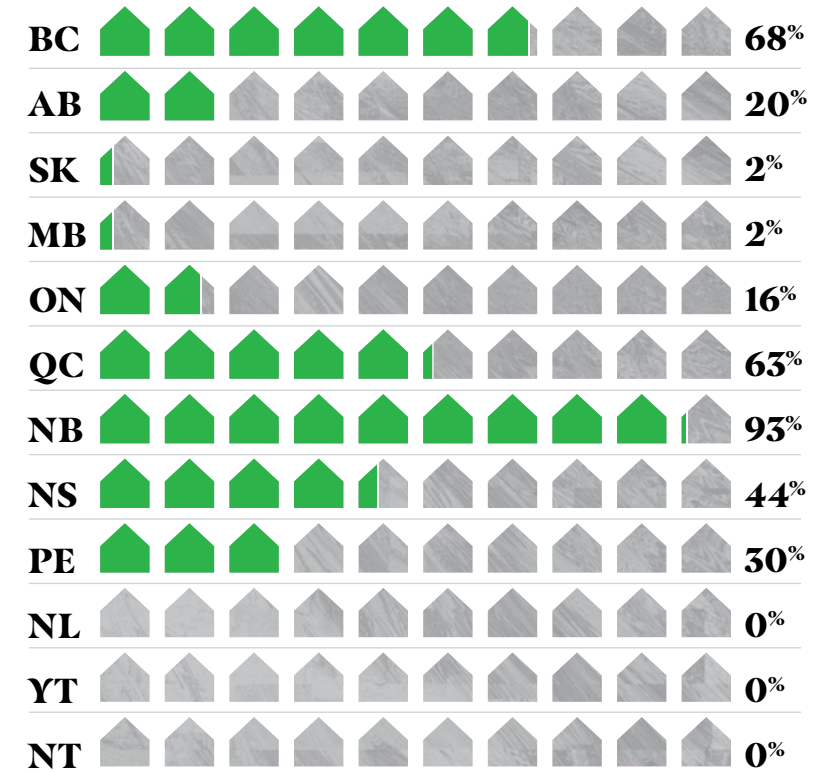
IN CANADA, WHERE YOU LIVE DETERMINES YOUR ACCESS TO MINIMUM BROADBAND SPEEDS. RURAL RESIDENTS AND ON-RESERVE INDIGENOUS COMMUNITIES HAVE MUCH LESS.

While most Canadian households (87%) have access to the minimum speeds of at least 50 Mbps for downloads and 10 Mbps for uploads, such speeds are available to only 46% of rural households and 35% of First Nations reserves.

Availability of 50/10 Mbps broadband with unlimited data by % of households (2018-2019)

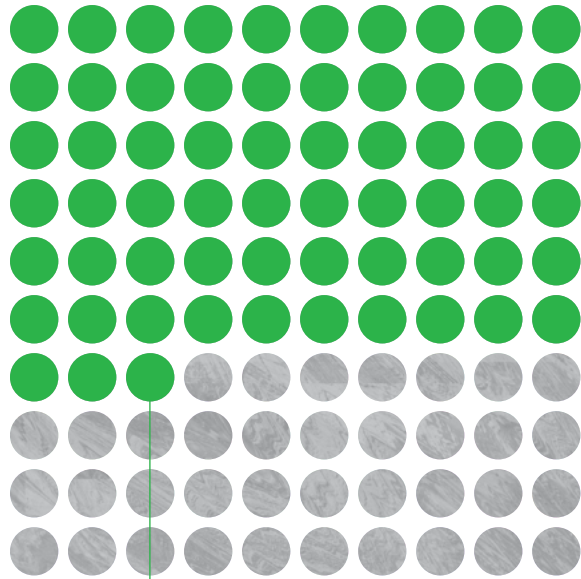


First Nations reserve broadband service availability by province/territory
% of households with 50/10/Unlimited speed (2019)



**MOST CANADIANS HAVE ACCESS TO THE INTERNET AT HOME;
THAT'S NOT THE CASE FOR OLDER PEOPLE AND LOWER-INCOME HOUSEHOLDS.**

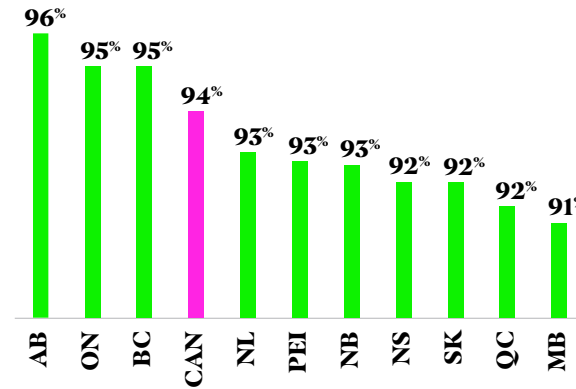
Seniors in the lowest income bracket



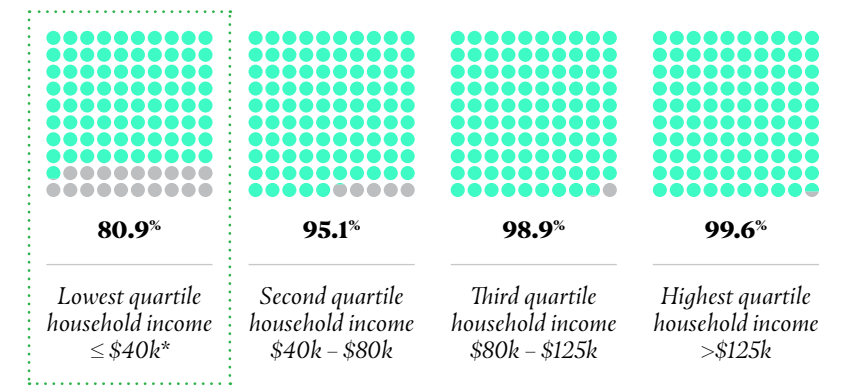
63%

Only 63% of seniors (aged 65+) in the lowest household income bracket (<\$40,000) have access to the internet at home.

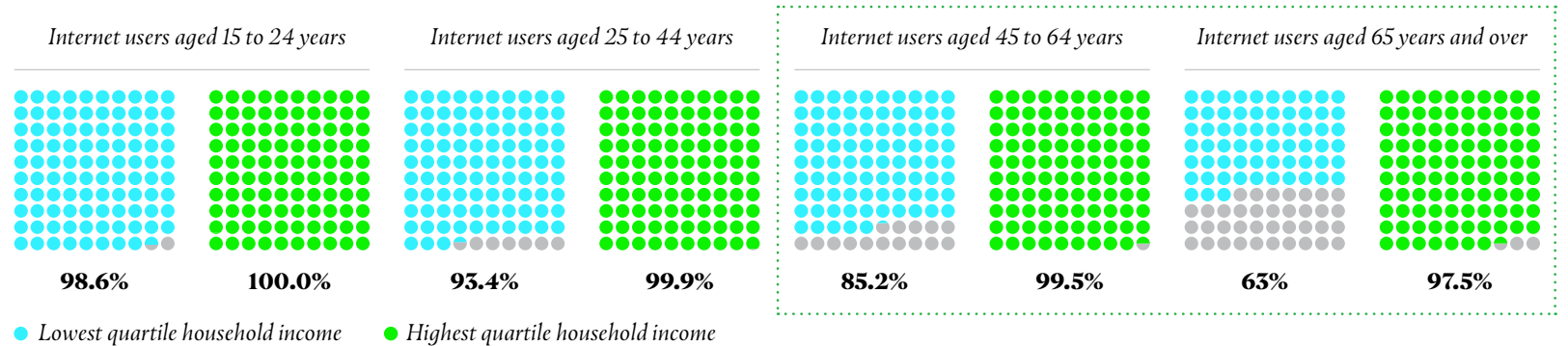
Canadians who have access to the internet at home by province (2020)



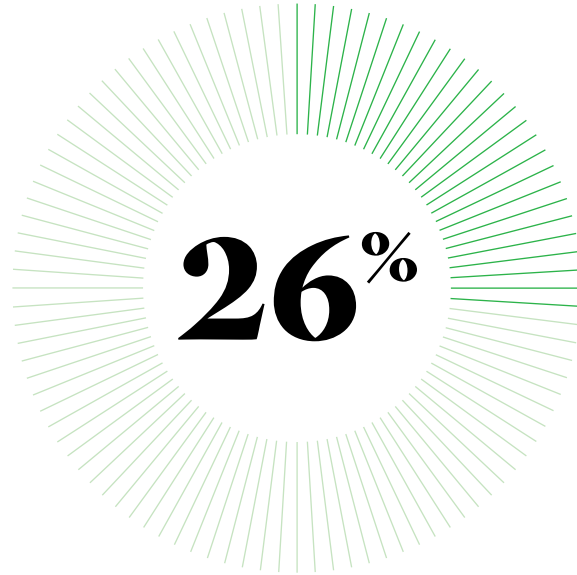
Access to internet at home by household income quartile (2018)



Access to internet at home by age group and household income quartile (2018)



BROADBAND PRICES IN CANADA ARE THE SECOND-HIGHEST IN THE G7. THIS HAS AN IMPACT ON DIGITAL ACCESS, AND THEREFORE EQUITY.



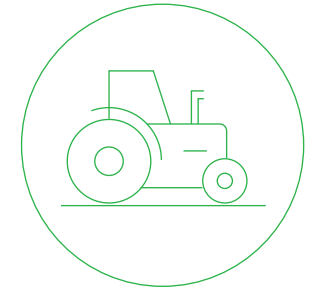
of Canadians who had no access to internet in 2020 cited **cost** as a reason.



In a 2019 study of 62 countries, Canada was found to be in the **top five costliest places** for 100-Mbps plans.



Canadian and US broadband rates (adjusted for Purchasing Power Parity) are **higher** for speeds above 16 Mbps than other G7 countries (2019).



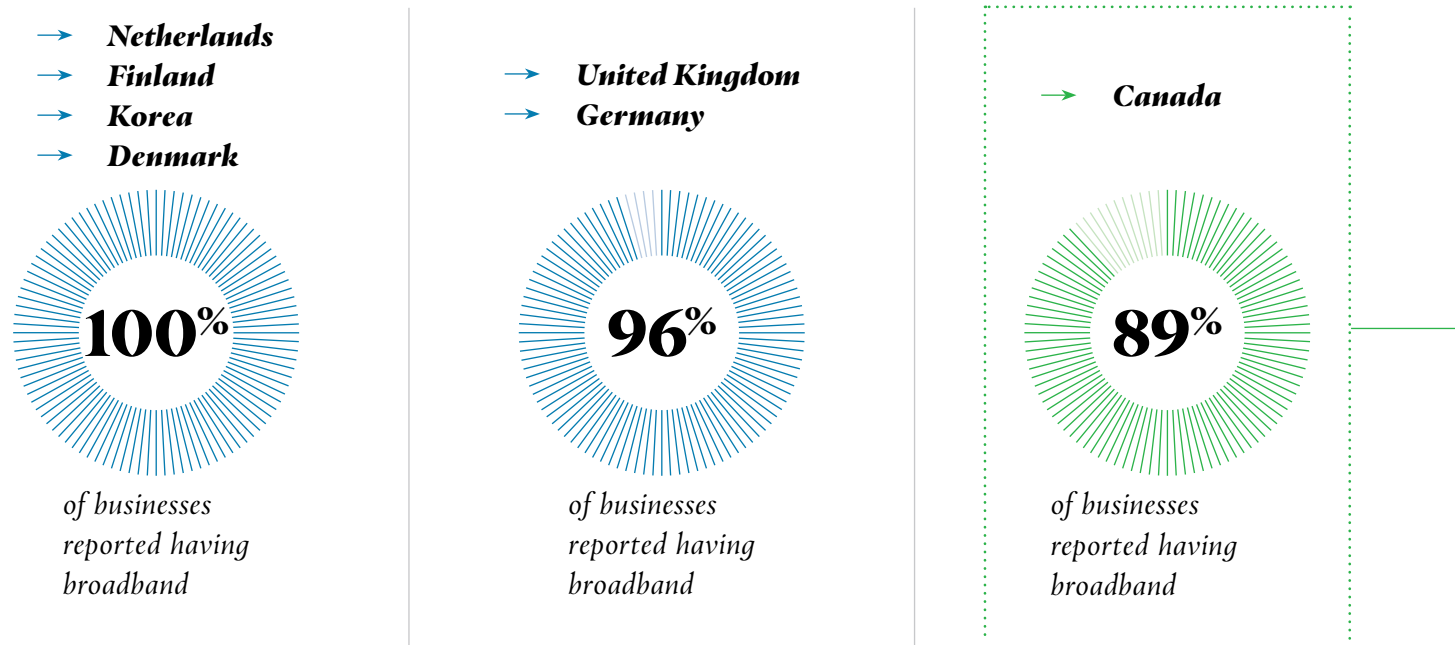
Average internet prices are even **higher in rural areas**, with households there paying about \$7 more per month for the same service as those living in or near urban centres.

Average prices of 50/10 Mbps unlimited internet plans, urban and rural Canada (2019)



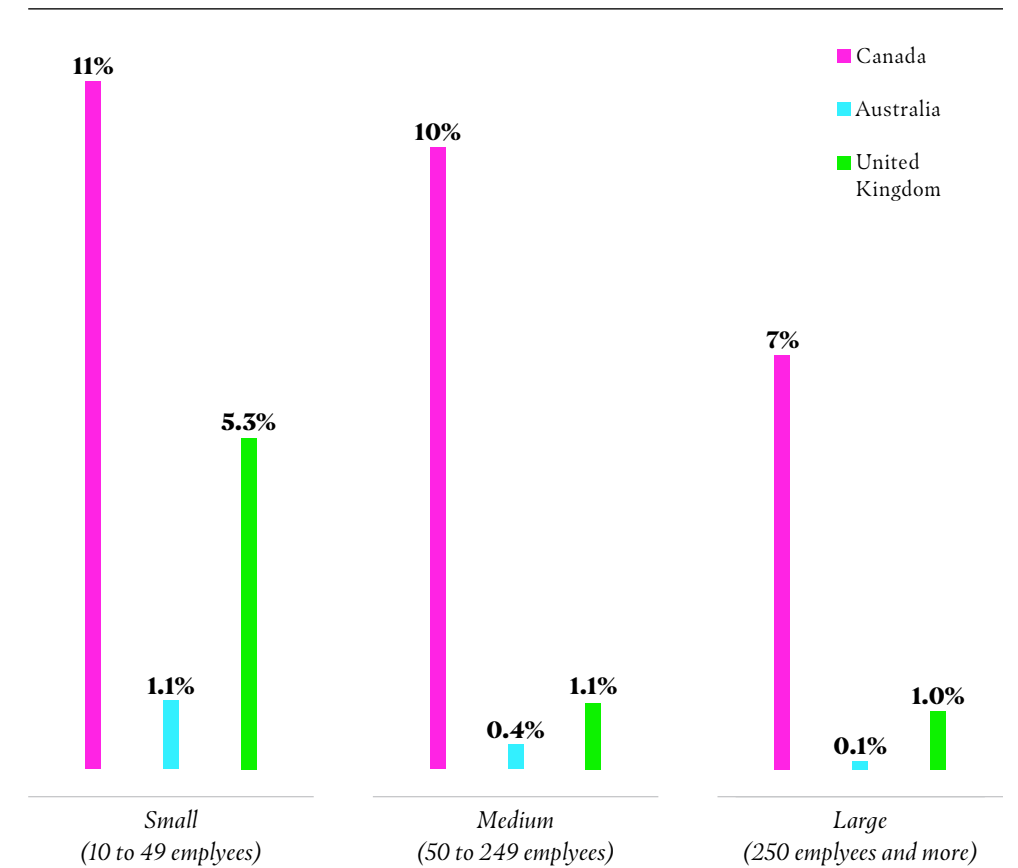
HEADING INTO THE PANDEMIC, 89% OF CANADIAN BUSINESSES HAD A BROADBAND CONNECTION – A DISMAL PROPORTION COMPARED TO OUR OECD PEERS.

Even large Canadian businesses were less likely to be connected compared to large businesses in peer countries.



Canada ranked nearly at the bottom – 27th out of 30 countries – for the number of businesses with broadband, fixed and mobile (2019).

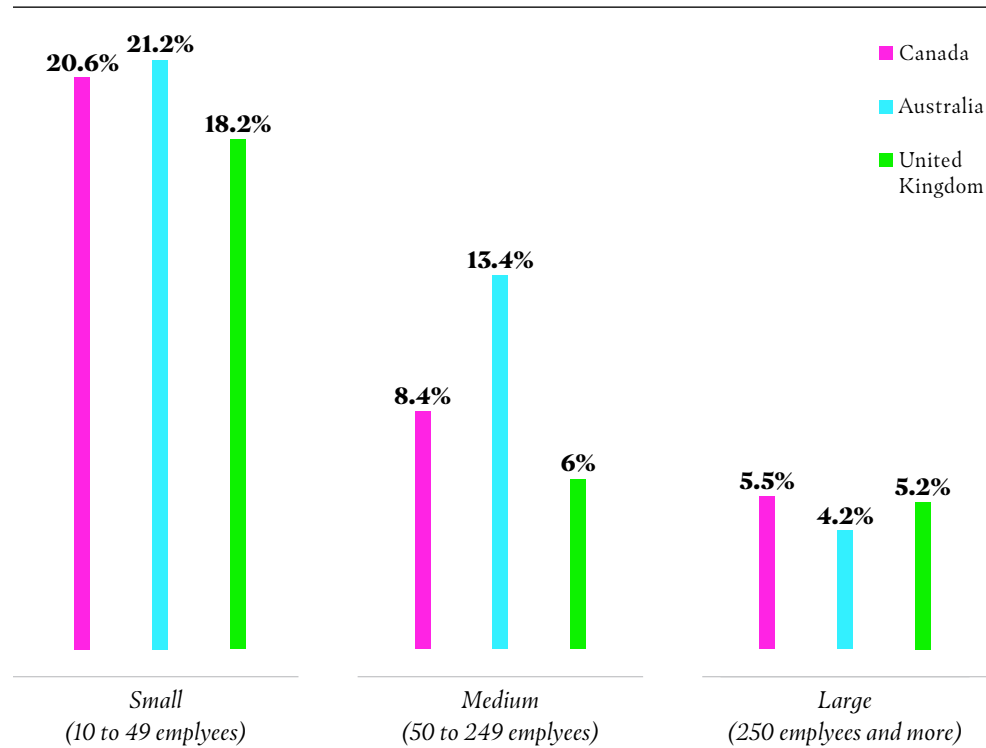
Businesses without a broadband connection, including fixed and mobile (2019)



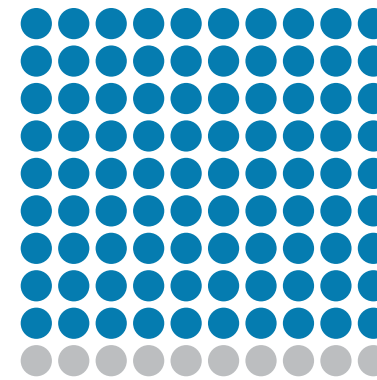
IN 2019, JUST 82% OF CANADIAN BUSINESSES HAD A WEBSITE OR HOMEPAGE. SMALL COMPANIES WERE SIGNIFICANTLY LESS LIKELY TO HAVE ONE.

Business size predicts online presence: while 5.5% of large organizations lacked a website or homepage in 2019, this figure climbed to 8.4% for medium-sized ones and 20.6% for small businesses.

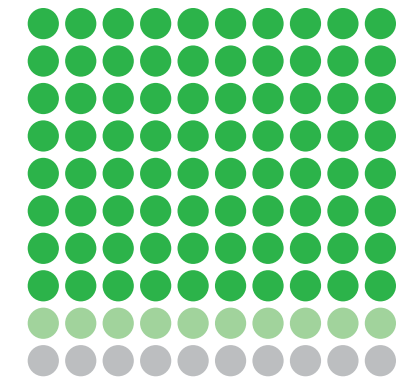
Canadian businesses without a website or homepage, by size (2019)



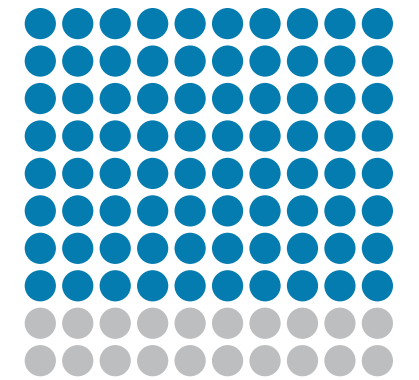
- Netherlands
- Japan
- Denmark



- United Kingdom
- Germany
- Canada



- France
- Korea



Canada is in the middle of the pack – 12th out of 29 countries – for the number of businesses with a website or homepage (2019).

BEFORE THE PANDEMIC, 28% OF CANADIAN BUSINESSES HAD A WEBSITE WITH ONLINE SALES OR E-COMMERCE CAPABILITIES, ABOVE THE OECD AVERAGE – BUT A RECENT SURVEY SHOWS THAT VERY FEW PLAN TO EXPAND THEIR DIGITAL CAPABILITIES.

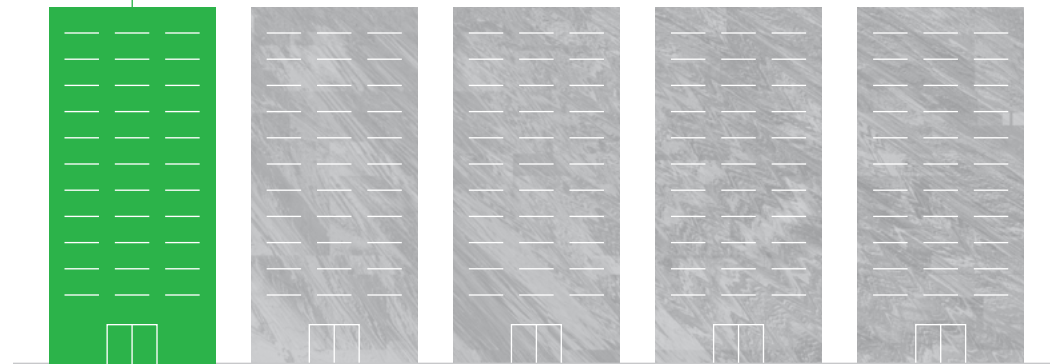
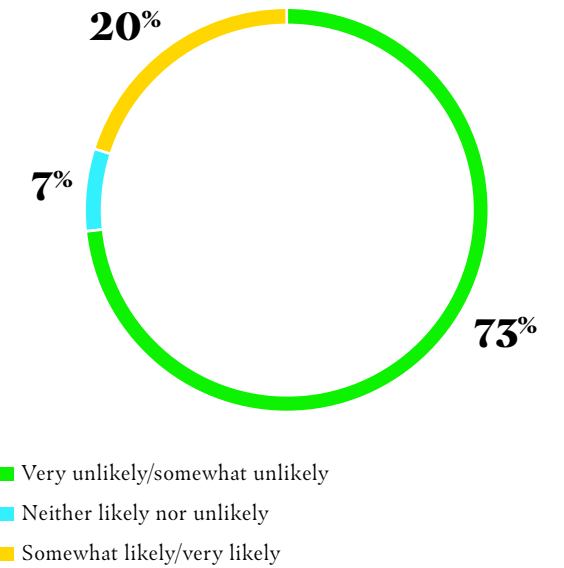
Only 1 in 5 businesses said in a 2021 survey that they're likely to invest in building a website with online ordering, reservation-making, or booking capabilities over the next 12 months, indicating that underinvestment in this area will continue to affect digital equity for businesses.

Percentage of businesses that had a website capable of online ordering and booking (2019)

1 st	NETHERLANDS	34%
7 th	CANADA	28%
10 th	UNITED KINGDOM	24%

Canada ranked 7th out of 25 countries

Likelihood of investment by Canadian businesses in online sales and e-commerce capabilities over the next 12 months (2021)



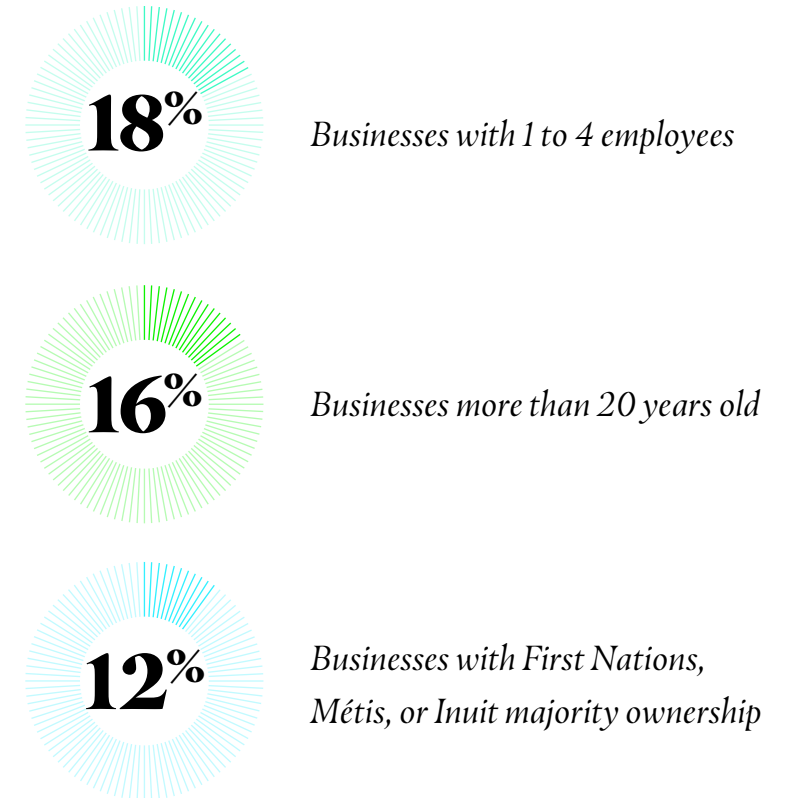
CANADIAN BUSINESSES ARE EVEN LESS LIKELY TO INVEST IN ONLINE SALES AND E-COMMERCE CAPABILITIES IF THEY ARE SMALLER, OLDER, OR INDIGENOUS-OWNED – AND DISPARITIES ACROSS INDUSTRIES ARE TROUBLING.

Just 12% of organizations with Indigenous ownership report they're likely to invest in online sales and e-commerce capabilities over the next year, compared to 20% of all businesses.

Percentage of businesses reporting they're somewhat likely or very likely to invest in online sales and e-commerce capabilities over the next 12 months, by industry (2021)



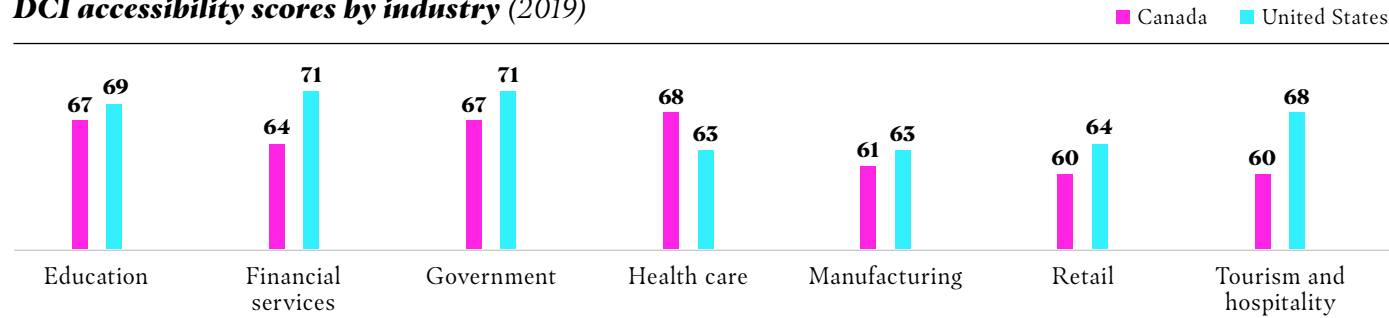
% of businesses that reported they are somewhat/very likely to invest



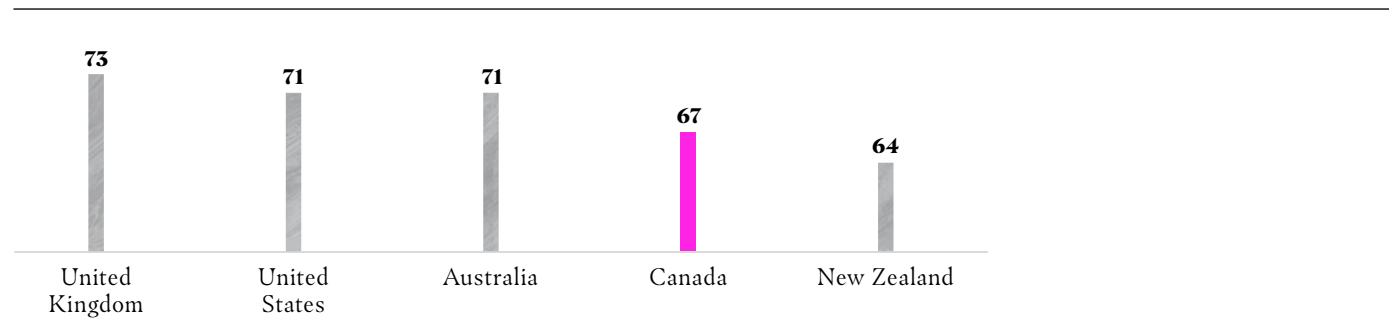
CANADA RANKS HIGHLY IN TERMS OF WEBSITE ACCESSIBILITY, BUT WE'RE OUTPERFORMED BY SEVERAL PEER COUNTRIES.

Industry-specific data reveals that improvements are needed, especially in manufacturing, retail, and tourism and hospitality. The same is true for government website accessibility: Canada scores well but trails the top performers.

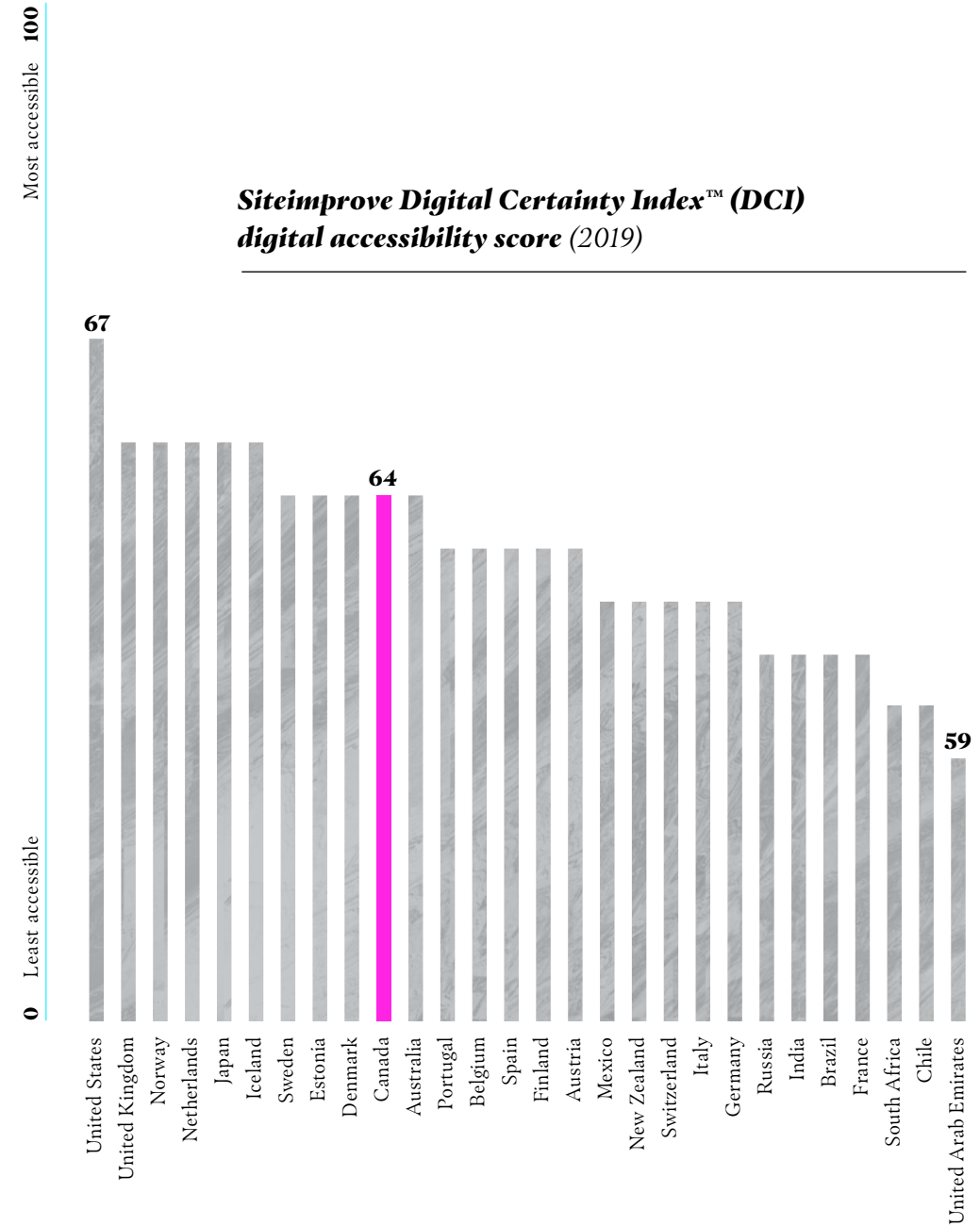
DCI accessibility scores by industry (2019)



DCI accessibility scores for government websites (2019)



Sources: Siteimprove



2. PARTICIPATION

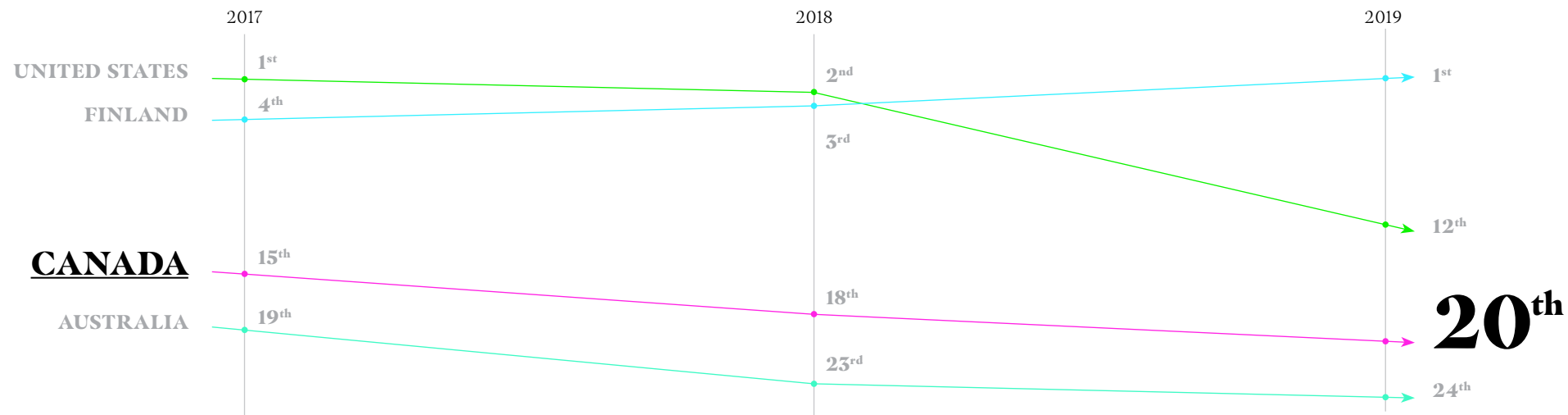
QUICK SUMMARY

- ◆ *At a national level, Canada ranks well in digital skills compared to its peers. But that doesn't hold true for groups that are already facing equity challenges.*
- ◆ *It's difficult to get an accurate picture, however, since there's a troubling lack of data about skills for specific population groups (especially race) and little data on a standardized form of measuring these skills, which is important for digital literacy.*
- ◆ *Businesses have a role to play in improving equity for these groups, but they aren't making the investments required to do so.*

PARTICIPATION

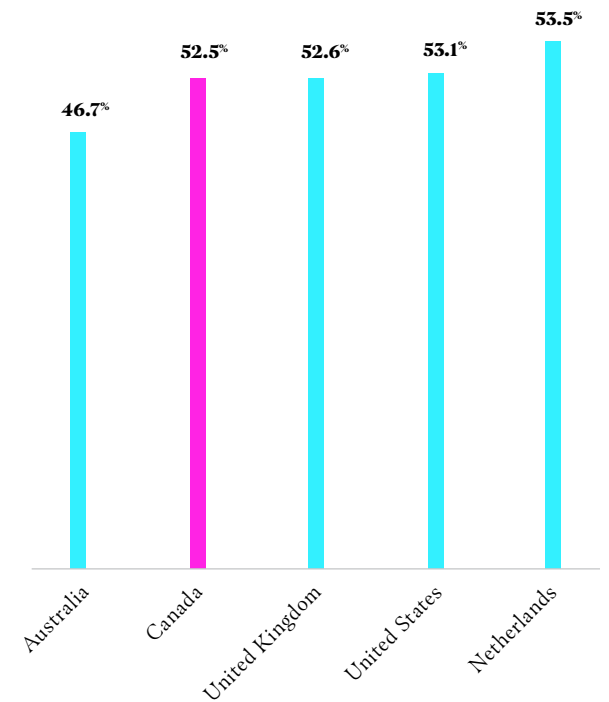
MORE THAN HALF OF CANADIAN WORKERS ARE EMPLOYED IN SECTORS OF HIGH AND MEDIUM-HIGH DIGITAL INTENSITY, BUT THE AVAILABILITY OF WORKERS WITH ENOUGH DIGITAL SKILLS HAS DECLINED OVER THE YEARS.

Businesses reporting the active population in their country possess sufficient digital skills (e.g., computer skills, basic coding, digital reading): *Canada's ranking has been falling*



Canada's ranking in a measure of number of workers with sufficient digital skills fell from 15th to 20th in just two years. This is especially concerning since more jobs are moving into sectors that require greater digital skills.

Share of total employment of high and medium-high digital intensity sectors, 2016 (% of jobs)



THE RISK OF BEING DISPLACED BY AUTOMATION IN CANADA IS NOT EVENLY DISTRIBUTED – AGE, INCOME, RACE, AND FIRM SIZE DETERMINE WHO IS AT HIGHER RISK OF LOSING THEIR JOB.




*Older workers and workers in the lowest employment income percentile are the most vulnerable.
To create a digitally equitable Canada, digital training for these groups will be essential.*

A 2020 study of automation and job transformation in Canada found that:

10.6% of workers were at high risk (probability of 70% or higher) of automation-related job transformation in 2016

29.1% of Canadian workers were at moderate risk (probability of 50 to 70%) of automation-related job transformation in 2016

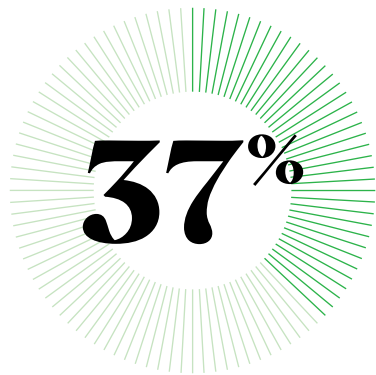
Canadian workers at high risk of automation-related job transformation (%)*

By age 	13.3% 18- to 24- year-olds	7.6% 25- to 34- year-olds	10.1% 35- to 54- year-olds	14.6% >55 years old
By employer size 	14.9% 1-10 employees	8.6% 11-50 employees	11.2% 51-250 employees	9.8% 251-1K employees
By employment income percentile 	26.8% <10th	16.6% 10th to 25th	13.7% 25th to 50th	5.5% 50th to 75th

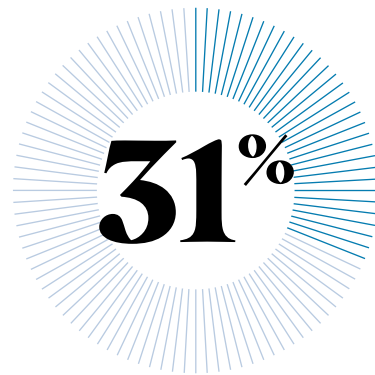
*A recent study by RBC also found that Indigenous workers are at a higher risk of automation than the rest of the population

CANADA PERFORMS WELL IN COMPARISON TO OECD PEERS IN TERMS OF PROBLEM-SOLVING IN TECHNOLOGY-RICH ENVIRONMENTS, BUT OLDER ADULTS ARE FALLING BEHIND.

A 2012 survey of adult workers' ability to problem-solve in technology-rich environments found that Canada performs above the OECD average

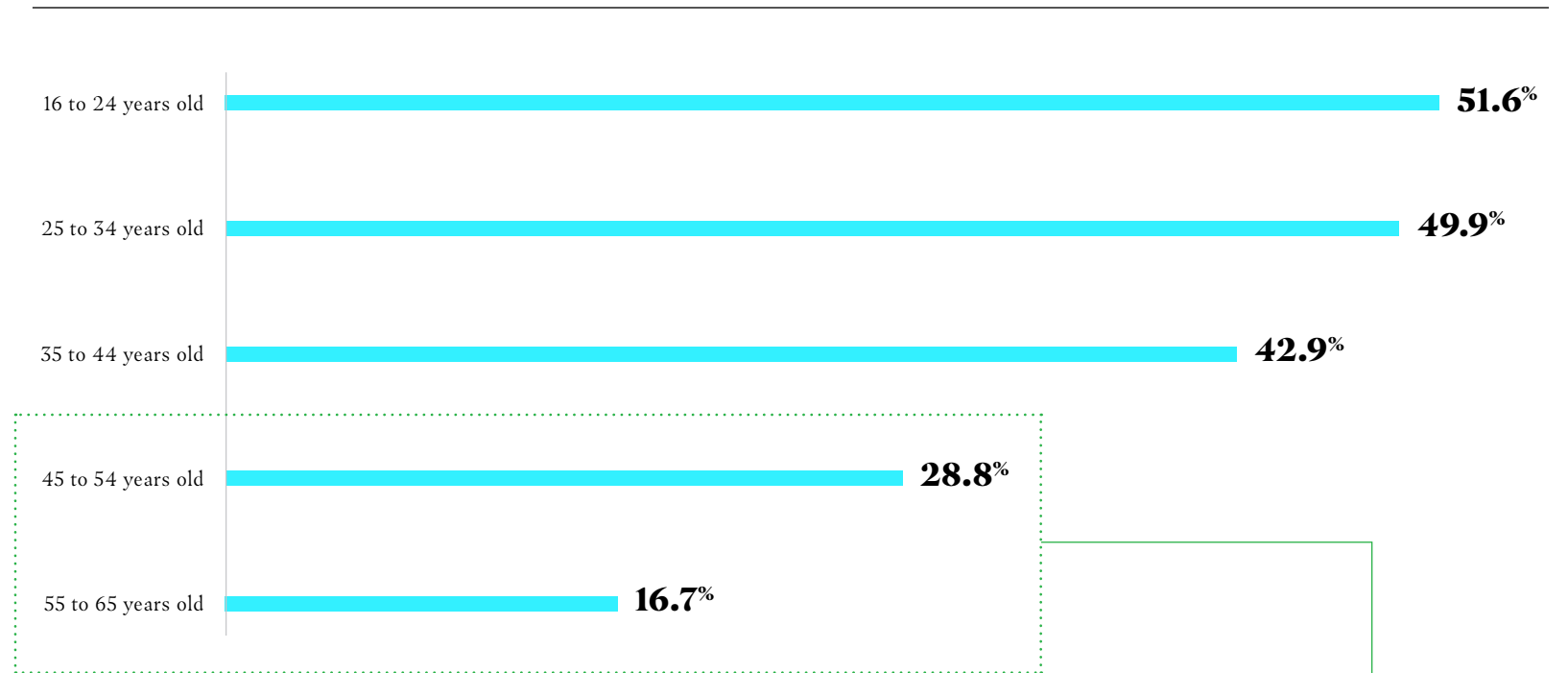


of Canadians scoring at a proficiency Level 2 or 3 in problem-solving



of individuals in the OECD are, on average, at Level 2 or 3 in problem-solving

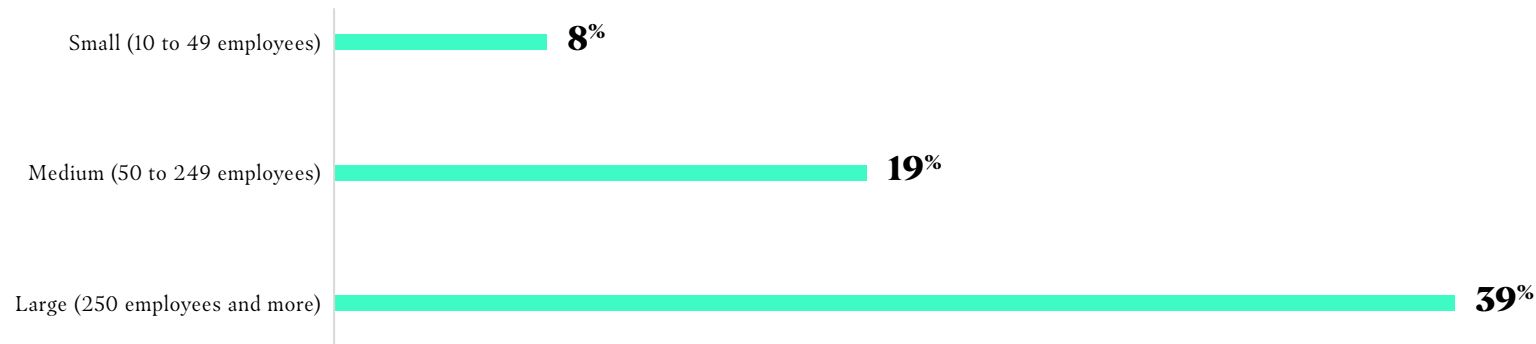
Percentage of the Canadian population scoring Level 2 or Level 3 in problem-solving in technology-rich environments, by age (2012)



Canadians aged 45 and older are less likely to be proficient. Many in this age cohort will still be part of the workforce 10 years from now, so—without targeted intervention—this skills gap will persist.

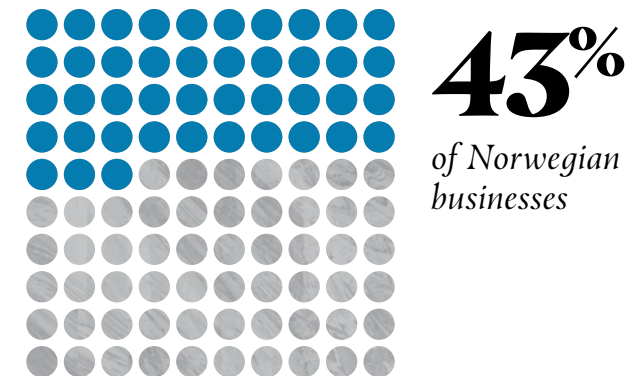
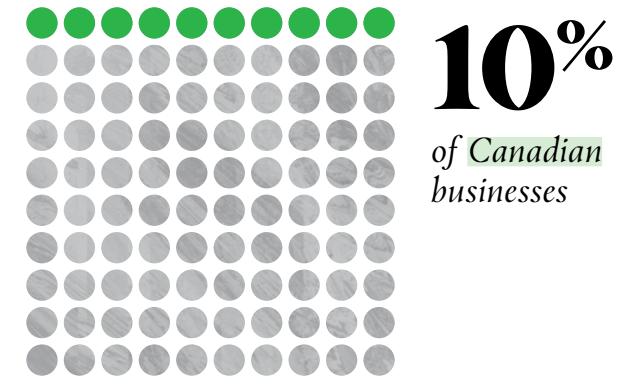
CANADIAN BUSINESSES, ESPECIALLY SMALLER ONES, ARE NOT INVESTING ENOUGH IN ICT SKILLS TRAINING FOR THEIR WORKERS.

Percentage of Canadian businesses that provided any type of training to develop ICT-related skills for persons not employed as ICT specialists, within the last 12 months, by size (2019)



Larger companies were more likely (39%) to provide information and communications technology (ICT) related skills training for their workers who were not directly employed in ICT than medium-sized businesses (19%) and small businesses (8%) in 2019.

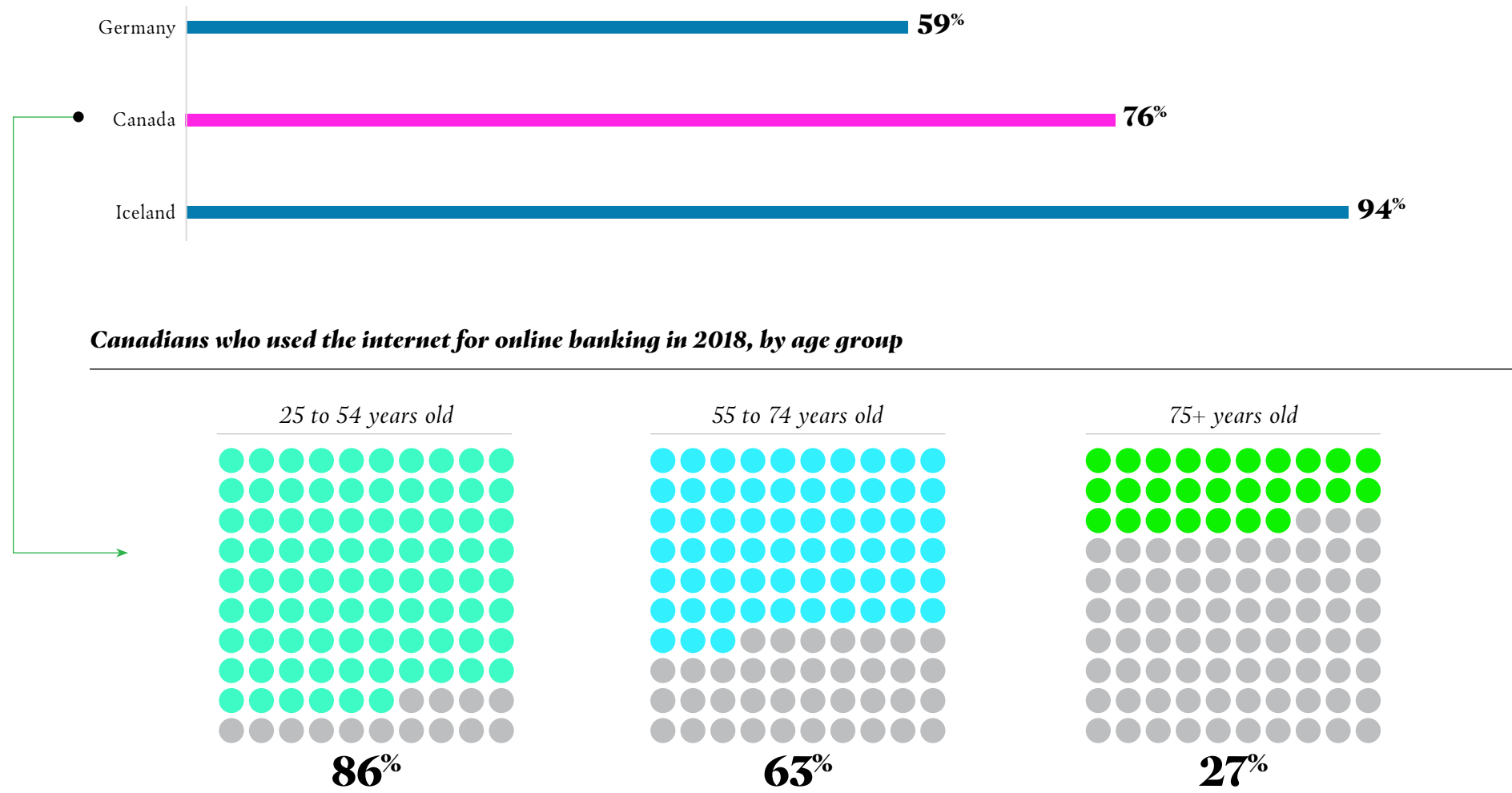
Canada ranked nearly in the bottom – 24th out of 25 countries – in the percentage of businesses that had provided ICT training within the past 12 months for persons not employed in ICT (2019).



ALTHOUGH MOST CANADIANS ARE BANKING ONLINE, THIS VARIES GREATLY BETWEEN DIFFERENT AGE GROUPS.

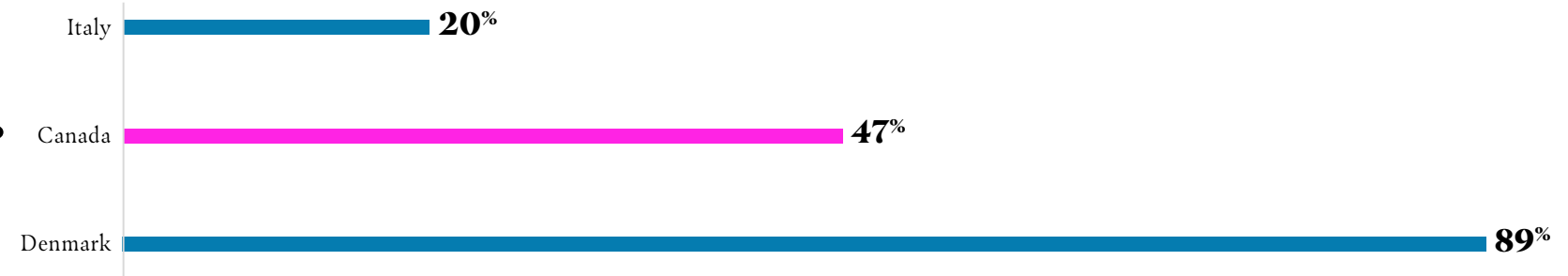
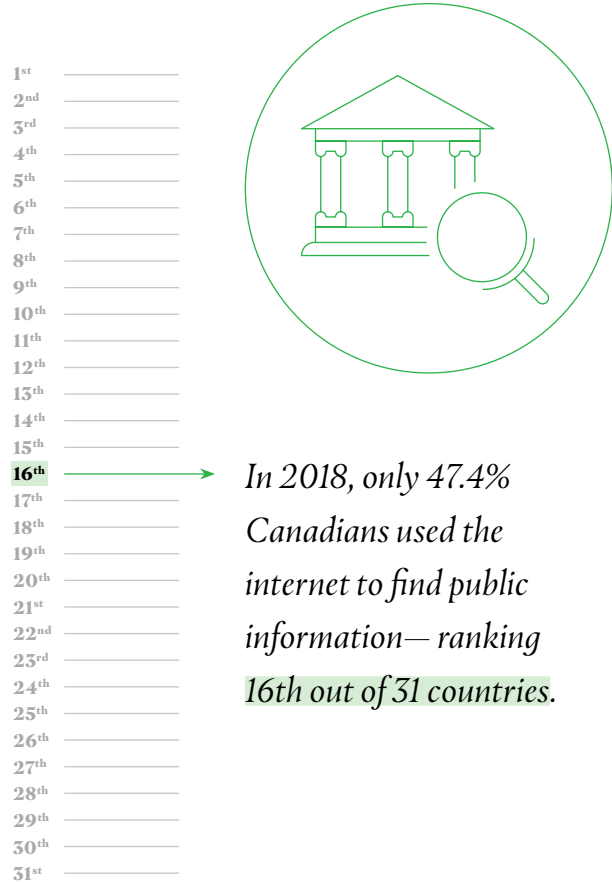
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In 2018, Canada ranked 8th out of 34 countries in the percentage of citizens who banked online.

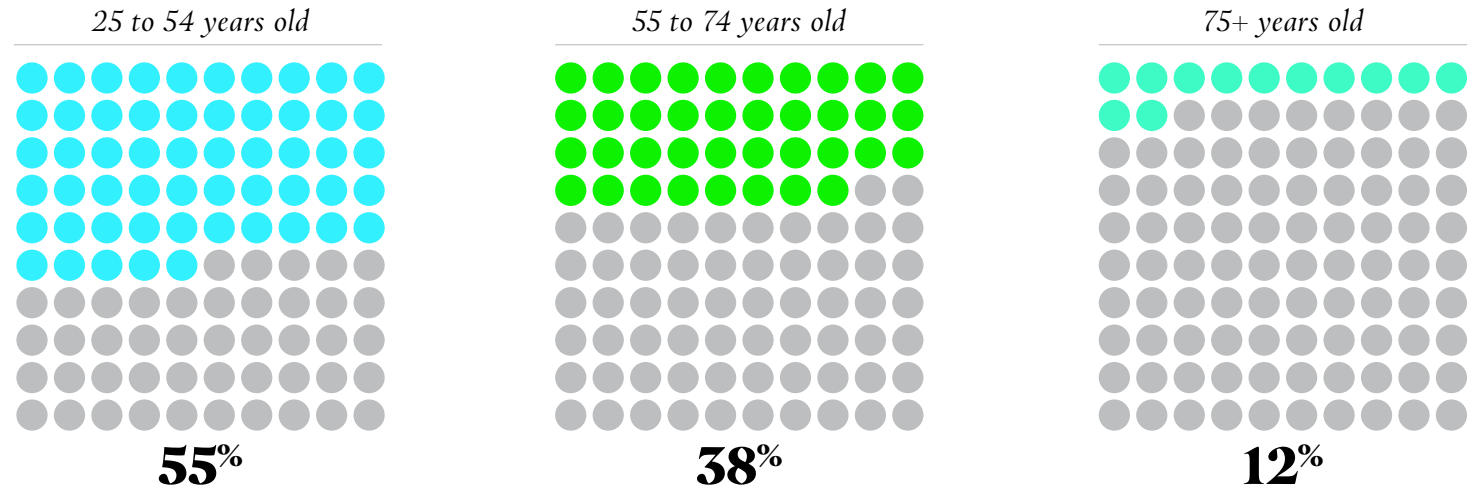


CANADIANS ARE ONLY AVERAGE IN USING THE INTERNET TO LOOK FOR INFORMATION FROM PUBLIC AUTHORITIES, WITH MAJOR GAPS BETWEEN AGE GROUPS.

Seniors are much less likely to look for information from public authorities.



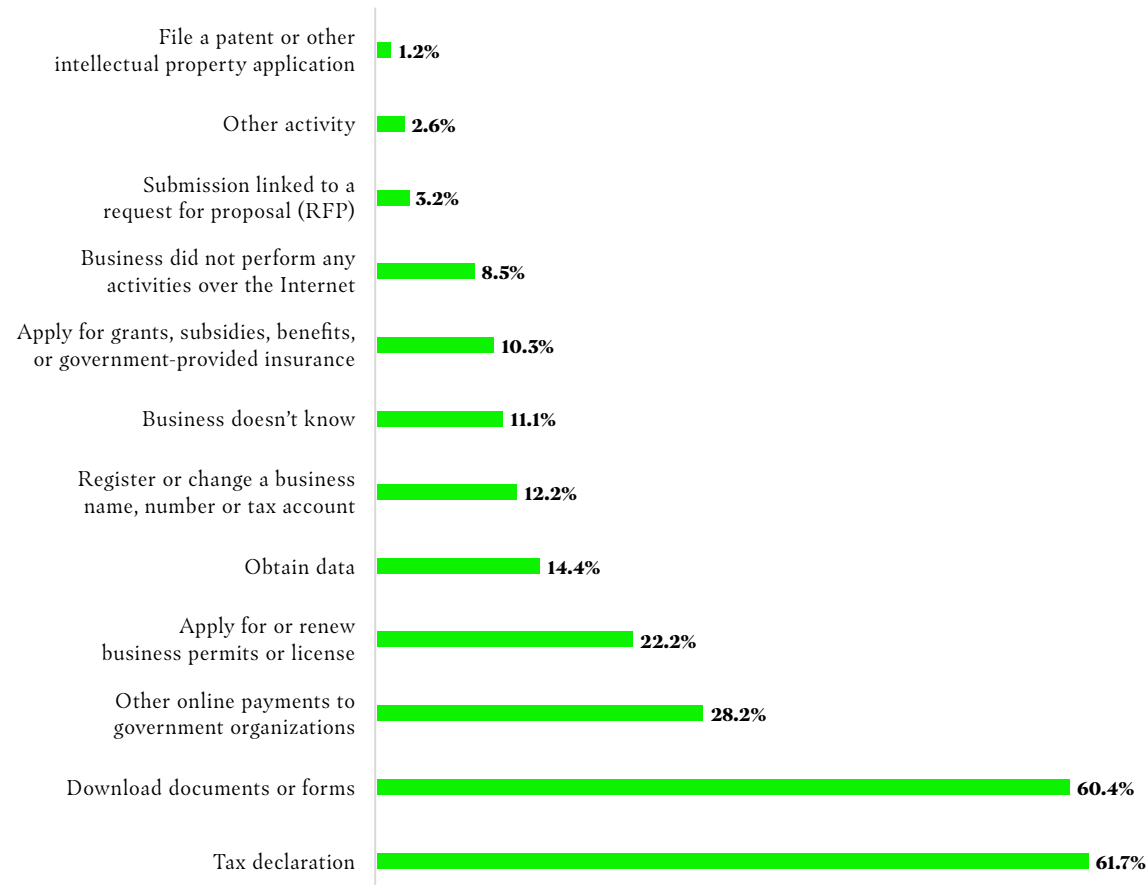
Canadians who used the internet for obtaining information from public authorities in 2018, by age group



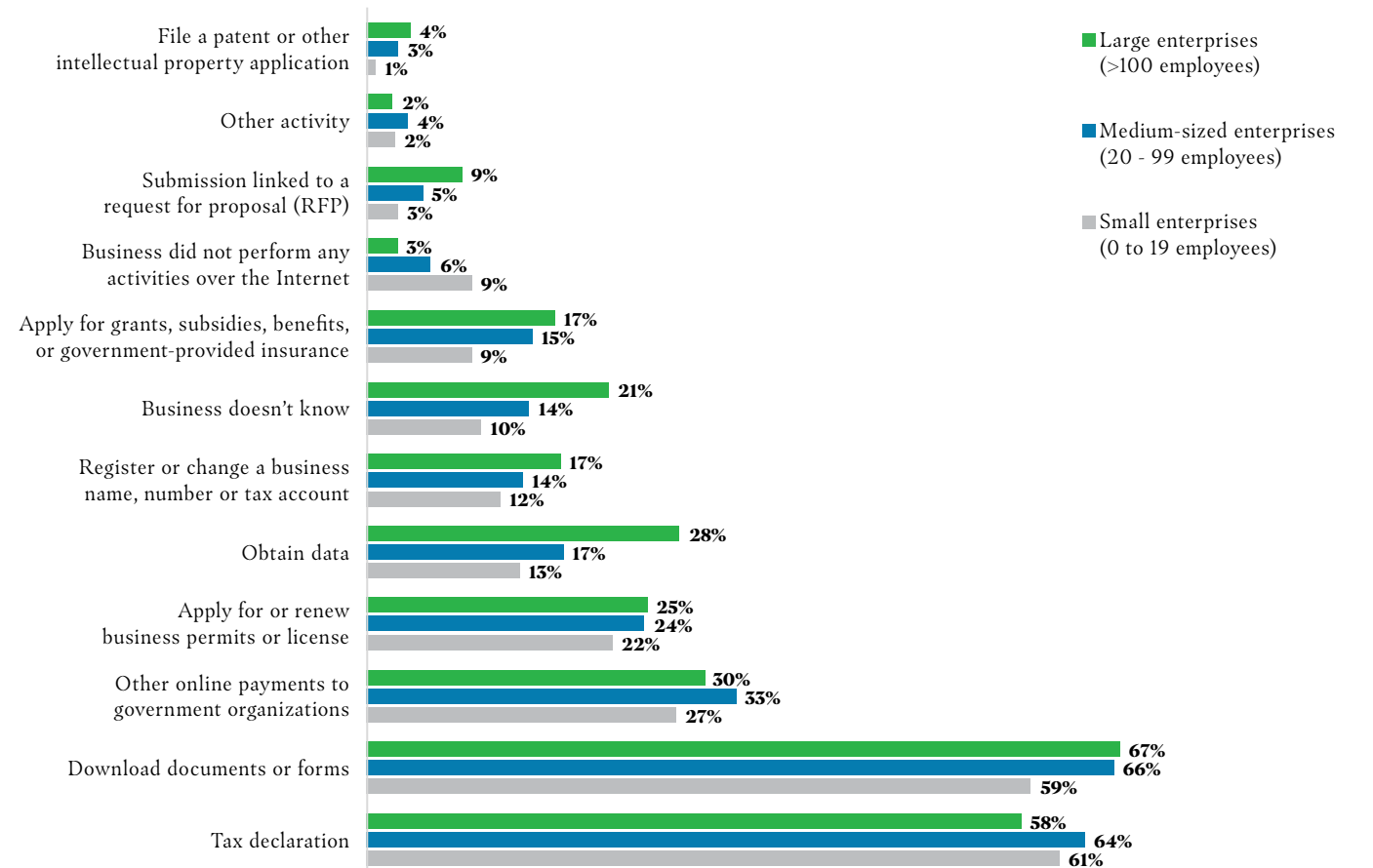
PRIVATE BUSINESSES HAVE FEW ONLINE INTERACTIONS WITH THE CANADIAN GOVERNMENT.

Except for tax declarations and document downloads, private businesses don't tend to use the internet to do such things as renew permits or licences, apply for grants or subsidies, or register a business name. And small businesses are even less likely than large ones to interact with the government online.

Canadian private businesses: percentage of online interactions with the federal government (2019)



Online interactions with the Canadian federal government by size of enterprise (2019)



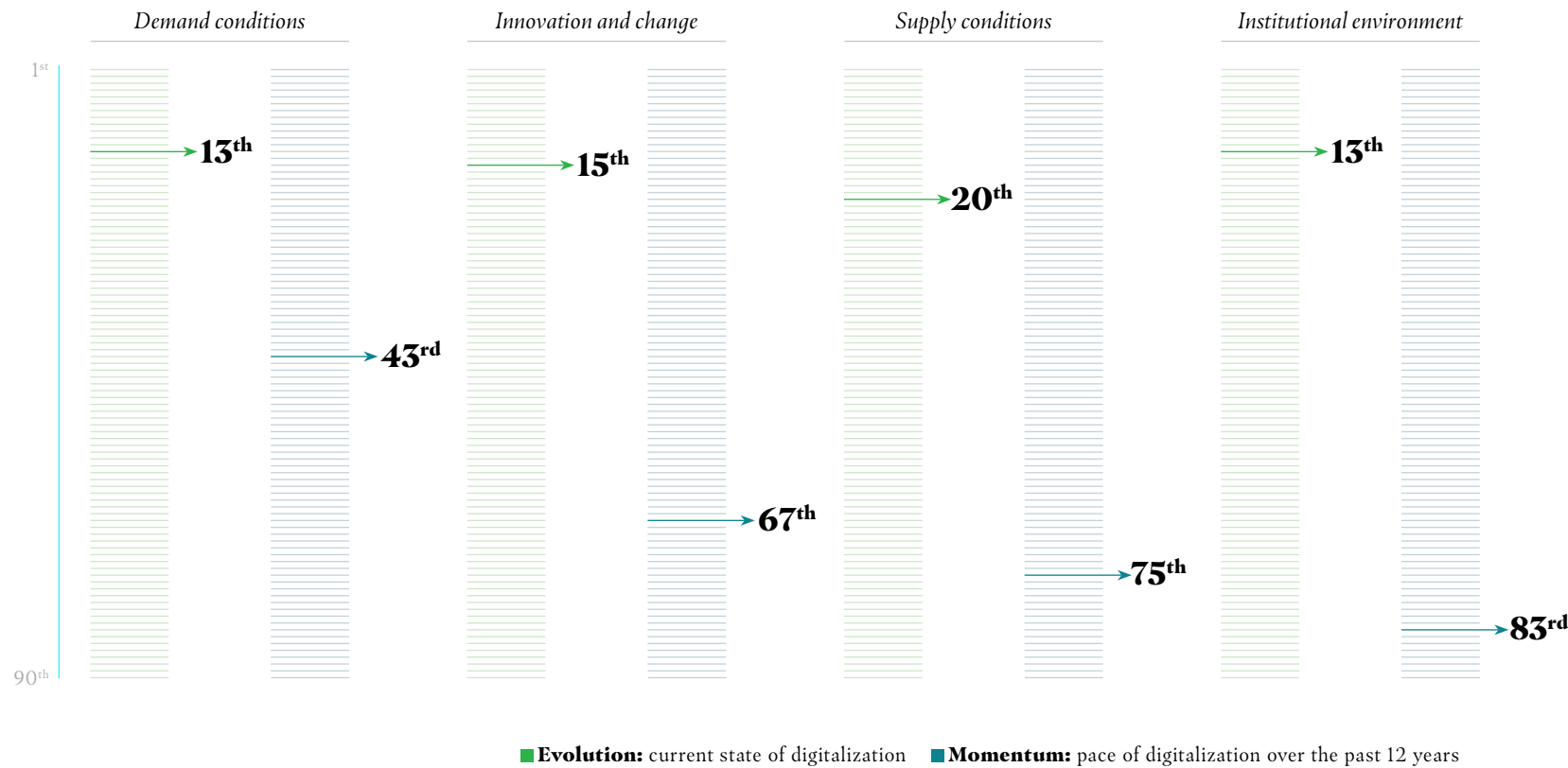
3. ECOSYSTEM

QUICK SUMMARY

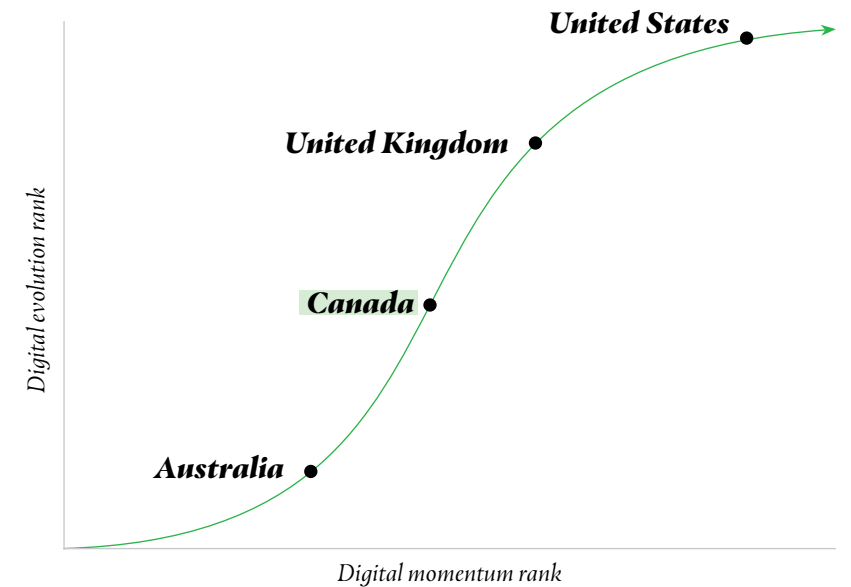
- ◆ *Canada's regulatory ecosystem ranks near the top among its peers, but we risk slipping if regulations don't keep up with the rapid changes occurring in the digital space.*
- ◆ *Investments in the digital space by Canadian businesses lag significantly now and don't currently show any increase is likely in the future, especially in digital transformation and policies.*
- ◆ *Data that tracks the outcomes of certain digital policies and investments for specific population groups is lacking.*

CANADA'S CURRENT STATE OF DIGITALIZATION IS HIGH, BUT WE'RE LOSING MOMENTUM.

Digitalization: Canada vs. 90 countries (2020)



Out of 90 countries ranked in one study on digitalization, Canada scores high on evolution (16th) but poorly on momentum (81st). We risk falling behind by 2030 if we don't address the problem now.



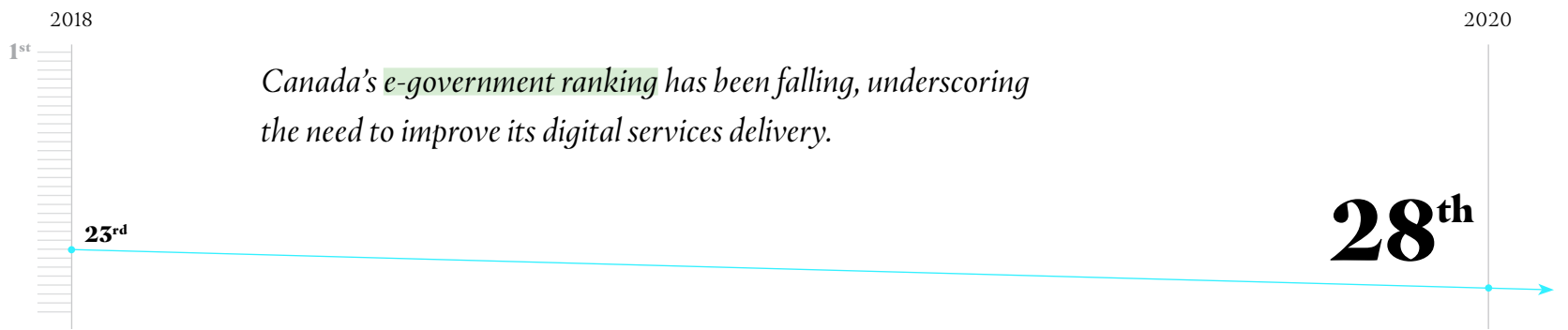
CANADA'S E-GOVERNMENT SERVICES RANKING IS FALLING ON A GLOBAL SCALE, BUT WE'RE IMPROVING WHEN IT COMES TO UPTAKE OF EXISTING ONLINE SERVICES.

Canada ranks well below its peers on the UN's most recent measurement of the readiness and capacity of national institutions to use information and communications technology to deliver public services, but has made progress on boosting public participation.

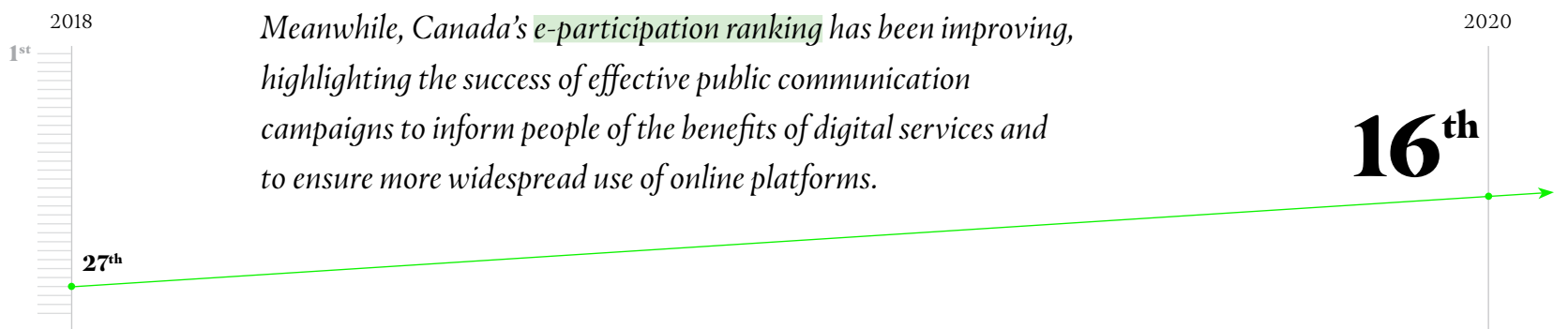
E-government rank (2020)



Canada's position among 193 countries in the UN's 2020 e-government ranking, well below the United States, United Kingdom, and other peers.



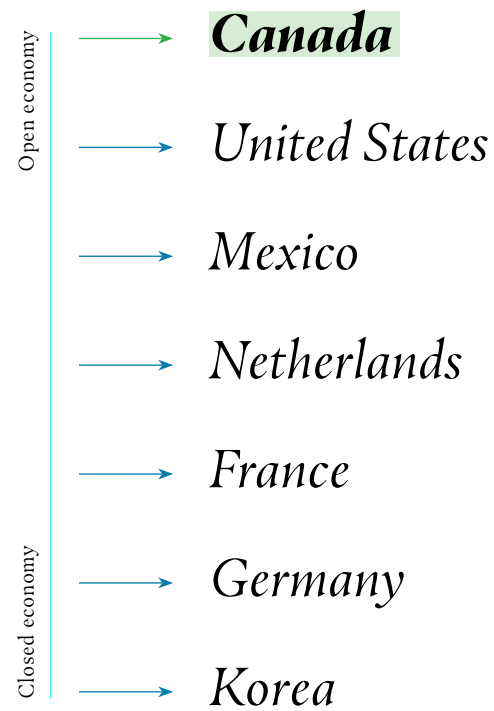
Canada's e-government ranking has been falling, underscoring the need to improve its digital services delivery.



Meanwhile, Canada's e-participation ranking has been improving, highlighting the success of effective public communication campaigns to inform people of the benefits of digital services and to ensure more widespread use of online platforms.

CANADA SCORES WELL AS AN OPEN ECONOMY WITH FEW BARRIERS TO SUPPLYING SERVICES DIGITALLY, BUT LAGS IN CREATING REGULATIONS THAT, ULTIMATELY, SUPPORT INCLUSION AND EQUITY GOALS.

*The adoption of specific initiatives, like open-banking, can advance inclusion and equity.
Canada's regulatory environment holds progress back nationally.*



From 2015-2020, Canada was consistently ranked the most open economy, among the 44 countries measured, in digital services trade.*

Open-banking readiness ranking (2018)

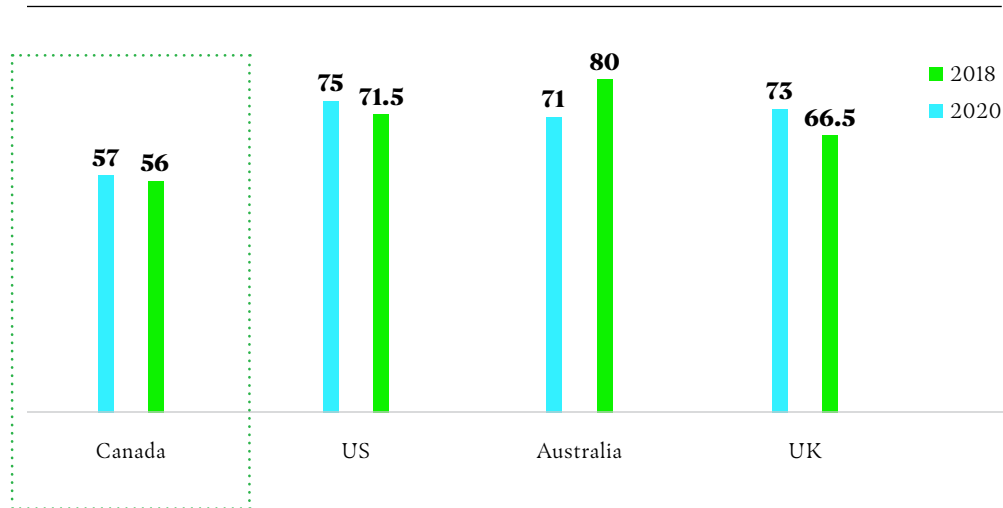
	Overall ranking	Regulatory environment	Adoption potential	Consumer sentiment	Innovation environment
UNITED KINGDOM	1 st	1 st	1 st	7 th	3 rd
UNITED STATES	4 th	9 th	6 th	2 nd	1 st
CANADA	8th	10th	10th	8th	5th
SPAIN	10 th	6 th	7 th	5 th	9 th

*measures barriers to trade—including infrastructure and connectivity, electronic transactions, e-payment systems, intellectual property rights, and others—in digitally enabled services

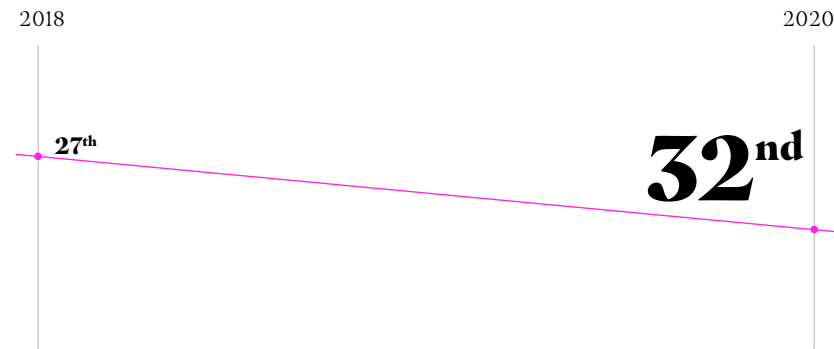
CANADA SCORES IN THE TOP 25% OF COUNTRIES ON MEASURES OF DIGITAL ACCESSIBILITY FOR PERSONS WITH DISABILITIES, BUT WE LACK POLICIES IN KEY AREAS, INCLUDING EDUCATION, EMPLOYMENT, AND INDEPENDENT LIVING.

While our laws and regulations get top marks and we have strong capacity for implementation, the absence of specific policies on digital accessibility drags down our overall ranking. In addition, lack of action in these areas is contributing to a fall in rankings.

Digital Accessibility Rights Evaluation (DARE)
Index scores (out of 100), 2018 and 2020

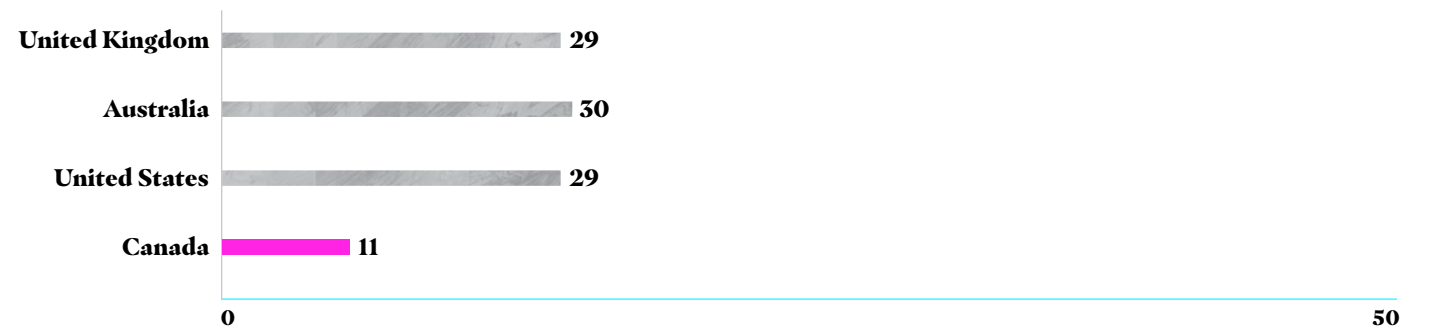


In 2020, Canada ranked 32nd (out of 137 countries) on the DARE Index Score 2020, which measures countries' progress in commitments, capacity to implement, and actual outcomes related to digital accessibility for persons with disabilities.



However, Canada's DARE Index global ranking has fallen since 2018 because it has yet to adopt and implement specific policies related to digital accessibility.

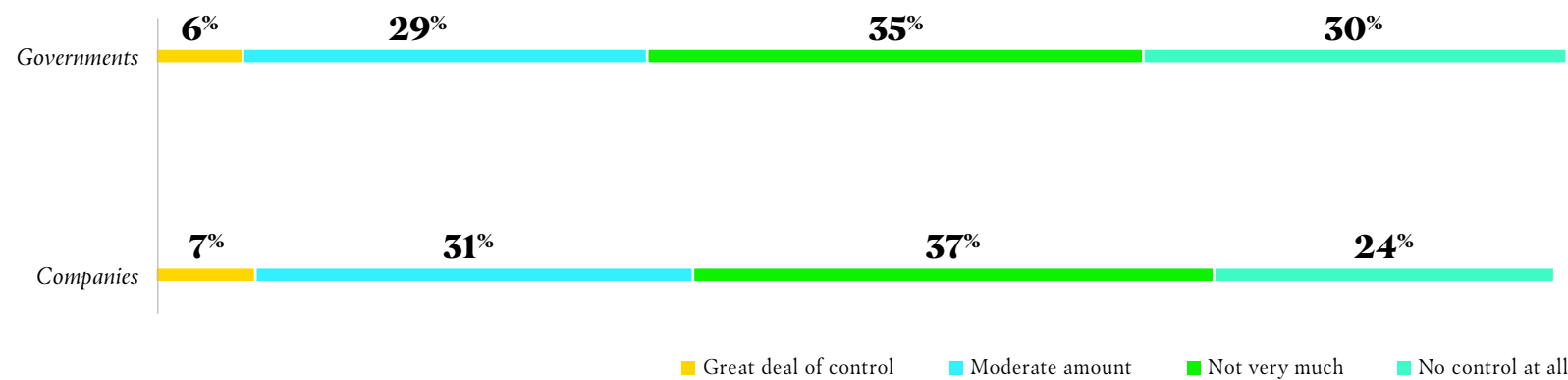
DARE Index 2020: Level of implementation score (0-50)



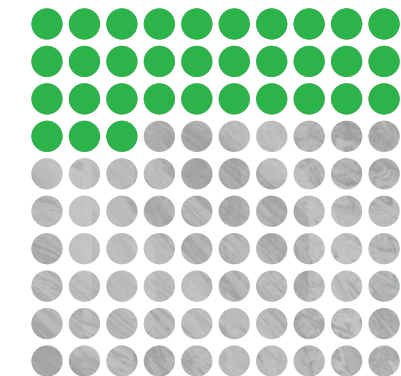
CANADIANS FEEL THEY HAVE LITTLE TO NO CONTROL OVER HOW THEIR PERSONAL INFORMATION IS BEING USED BY EITHER COMPANIES OR BY GOVERNMENT, AND THIS VARIES BY AGE AND PROVINCE.

→ *Canadians feel they have not very much or no control at all over how their personal information is used by companies (61%) or by government (65%), while older population groups and people from BC were more likely to echo this sentiment about companies.*

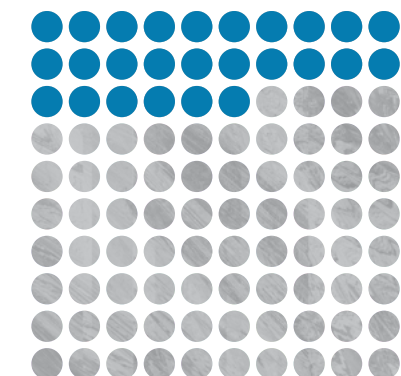
Respondents reply to “How much control do you feel you have over how your personal information is being used by governments and companies”? (2020, N=1,516)



Differences by age and province as to who feels they have control over their personal information given to companies (2020)



33%
of those aged 55 and older said they have a great deal or a moderate amount of control (compared to 53% of 16 to 24 year olds and 36% of 35 to 54 year olds)



26%
of respondents from British Columbia said they have a great deal or a moderate amount of control (compared to 43% from the Prairies, 41% in Atlantic Canada, and 40% in Ontario)

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