



Challenges and opportunities for the Internet in Canada

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The Canadian Internet Registration Authority (CIRA) is the organization that manages the .CA domain space on behalf of all Canadians.

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TABLE OF CONTENTS

METHODOLOGY	2
KEY FINDINGS	2
ANALYSIS	4
Challenges of the Internet:	4
Opportunities for success of the Internet:	4
CONCLUSION	4
APPENDICES	6
Appendix 1	6
Appendix 2	7
Appendix 3	8
Appendix 4	9

CHALLENGES AND OPPORTUNITIES FOR THE INTERNET IN CANADA

Introduction

The Canadian Internet Registration Authority (CIRA) is the member-driven organization that manages Canada's .CA domain name registry, develops and implements policies that support Canada's Internet community, and represents the .CA registry internationally.

The Internet has become a critical piece of domestic and international infrastructure. This fact is demonstrated by Canadians' own increasing use of the Internet, which is nearly double the worldwide average, according to a comScore white paper released in March 2011.

Canadians' interest in the Internet is also reflected in the rapid growth of the .CA domain. Since CIRA took stewardship of the registry in 2000, .CA has become one of the world's fastest growing Internet country code top-level domains (ccTLD) with over 1.7 million registered domain names.

Despite this, Canadians have generally had limited exposure to how the Internet is governed or administered. CIRA created the 2011 Canadian Internet Forum (CIF) to rectify this by initiating a dialogue with Canadians about issues related to Internet governance.

In 2010-11, CIRA held six face-to-face consultations across Canada and an online discussion forum on the broad topics of digital economy and digital literacy. It culminated in a national event held in Ottawa and webcast across the country in February 2011. The full results are summarized in a report entitled *The Internet and Canada's Future: Opportunities and Challenges*. This document is available here: <http://cira.ca/knowledge-centre/white-papers/>.

While Canadians have had limited exposure to how the Internet is governed or administered, CIF participants showed a keen interest in continuing the forum. As stated in the report from the CIF, "The discussions suggested that the fast evolving nature of the Internet requires all stakeholders not only to position themselves to leverage the opportunities it offers, but also to cooperate in the development of innovative, multi-stakeholder governance approaches to the challenges it raises."

CIRA will co-ordinate the 2012 Canadian Internet Forum to maintain the momentum around discussions about Internet governance with Canadians. To further gauge Canadians understanding of Internet governance-related issues, CIRA conducted a national survey in September 2011.

CIRA engaged Ottawa-based Nanos Research to conduct a national random telephone survey on the following:

1. Challenges to the success of the Internet in Canada.
2. Opportunities for the success of the Internet in Canada.
3. Obstacles faced by individual users of the Internet in Canada.

4. Personal benefits for users of the Internet in Canada.

The results of this survey will inform the broad topics explored in the 2012 CIF.

Methodology

CIRA engaged Nanos Research to conduct a survey of Canadians to get a snapshot of their views on perceived obstacles and opportunities of the Internet in Canada.

Nanos Research conducted a random telephone survey, offered in English and French, of 1,210 Canadians between August 29 and September 1, 2011. The survey consisted of four open-ended questions. The margin of error for a survey of 1,210 Canadians is ± 2.8 percentage points, 19 times out of 20.

Key Findings

Responses can be broadly grouped in the following categories:

1. Challenges to the success of the Internet in Canada.

Participants in the survey were asked, unprompted, what the main challenge of the Internet was in Canada. Four in ten (40.1 per cent) could not articulate a challenge.

However, those who did respond were very practical.

Internet security and accessibility have consistently been high profile issues for Canadians. This was clearly demonstrated in the findings of the 2011 CIF, and is again reflected in the results of this survey.

One in ten Canadians (10.7 per cent) said security was the Internet's main challenge and a further one in six responded accessibility (9.7 per cent) or cost (7.1 per cent).

A full list of responses can be found in [Appendix 1](#).

2. Opportunities for the success of the Internet in Canada.

When asked, unprompted, what the main opportunity for the success of the Internet in Canada was, nearly half (49.2 per cent) of all surveyed Canadians answered that they were unsure.

Better access and cost were again among the top responses (9.2 per cent), followed by access to a wealth of information (5.2 per cent), improved communication (5.0



per cent), business and marketing opportunities (4.9 per cent), and education (3.8 per cent).

A full list of responses can be found in [Appendix 2](#).

3. Obstacles faced by individual users of the Internet in Canada.

On their greatest obstacle related to day-to-day usage of the Internet, nearly one-third of Canadians (31.9 per cent) did not identify an obstacle. One in five (17.5 per cent) said out right there was no obstacle at all.

The results also raised another prominent theme at the 2011 CIF. Digital literacy, particularly in regards to online privacy, has been a growing issue among Canadians in recent years. This was largely reflected at the 2011 CIF, as well as a need to offer public education.

The results of this survey underline that this is still an issue of high importance to Canadians. The top unprompted response to daily obstacles to usage of the Internet was lack of digital literacy (9.1 per cent) followed by speed of the Internet connection (6.6 per cent).

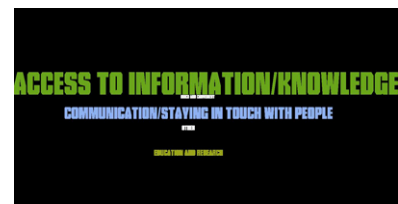
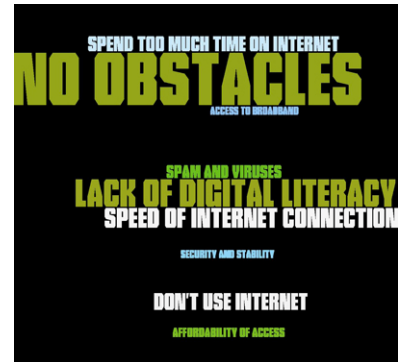
A full list of responses can be found in [Appendix 3](#).

4. Personal benefits for users of the Internet in Canada.

Participants were asked to provide what they believed were the personal benefits the Internet offers on a daily basis. Canadians' top unprompted personal benefit of the Internet was access to information/knowledge (32.0 per cent), followed by communication/staying in touch with people (16.8 per cent) and education and research (8.1 per cent).

Canadians had a comparatively better idea of what to answer to this question, as less than one in six (14.2 per cent) respondents did not identify a personal benefit of the Internet.

A full list of responses can be found in [Appendix 4](#).



Analysis

Based on the results of this survey, opportunities and challenges, both in general and personal, to the success of the Internet were grouped under the following headings. These broad themes are recommended to initiate discussions at the 2012 CIF:

Challenges of the Internet:

1. Security and safety on the Internet: including topics such as stability and security of the Internet, viruses, spam, and cyber-crime.
2. Access and cost: including topics such as accessibility, high speeds and reliable connections, and Canada's technical infrastructure.
3. Digital literacy: including topics such as privacy, parental controls, educating people how to use the Internet, lack of digital literacy, and language barriers.
4. Policy and governance: including topics such as regulating content, general regulation of the Internet, and net neutrality.

Opportunities for success of the Internet:

1. Education/digital literacy: including topics such as privacy, education, and research.
2. Digital economy: including topics such as business and marketing opportunities, jobs, and online banking.
3. Communications: including topics such as improved communications, access to information and knowledge, global connections, and social media and networking.
4. Technology and regulation: including topics such as regulatory/privacy/security issues and wireless technology/progress.

Conclusion

It was not surprising that many respondents could not identify a challenge or opportunity, either in general or personal, to the success of the Internet in Canada. While the Internet has become one of the most critical pieces of infrastructure of our time, underpinning Canada's social and economic systems, these results further demonstrate that Canadians have had only limited opportunities to engage in discussions about the how the Internet is developed and governed.

However, the lack of identifiable challenges to the Internet may be a testament to the model in which the Internet is governed. The current multi-stakeholder, bottom-up approach to governing the Internet is one that gives the technicians and operators as much power as the policy-makers. The model has been a driver of innovation and creativity that has largely contributed to its success and progress.

A lack of perceived challenges indicates an opportunity to educate Canadians to take advantage of opportunities and growth within the digital economy.

With the 2012 CIF, CIRA will offer a venue to engage Canadians in more discussions on how the Internet is developed and governed. While many Canadians could not identify a challenge or opportunity for the success of the Internet, many did, and it is these topics we wish to explore at the CIF.

The fact that the Internet has become so pervasive in the lives of Canadians highlights the importance of engaging a broad sector of people and organizations in discussions about its future. The fact is, all Canadians have a stake in how the Internet develops and is run. The CIF is the venue for their voices to be heard; if they do not speak for themselves, someone will speak for them.

Appendices

Appendix 1

What do you think is the main challenge, in general, to the success of the Internet in Canada today? [Open-ended]

		Frequency	Per cent	Cumulative per cent
Valid	Unsure	485	40.1	40.1
	Security	130	10.7	50.8
	Accessibility	117	9.7	60.5
	Other	99	8.2	68.7
	Cost	86	7.1	75.8
	Nothing	57	4.7	80.5
	Content regulating	46	3.8	84.3
	Privacy	39	3.3	87.6
	High speeds/reliable connection	29	2.4	90.0
	Don't use it/don't have Internet	25	2.1	92.0
	Internet providers/competition	24	2.0	94.0
	Regulations	16	1.3	95.4
	Parental controls	16	1.3	96.7
	Viruses/spam	15	1.3	97.9
	Usage - too much	13	1.1	99.0
	Educating people – how to use it	12	1.0	100.0
	Total	1210	100.0	

Appendix 2

What do you think is the main opportunity, in general, for the success of the Internet in Canada today? [Open-ended]

		Frequency	Per cent	Cumulative per cent
Valid	Unsure	595	49.2	49.2
	Better access/affordability	111	9.2	58.4
	Access to a wealth of information	63	5.2	63.6
	Improved communication	61	5.0	68.6
	Business/marketing opportunities	60	4.9	73.5
	Education	46	3.8	77.3
	Other	45	3.7	81.0
	Global connections	42	3.5	84.5
	Regulatory/privacy/security issues	30	2.5	87.0
	Great/necessary	30	2.5	89.5
	Nothing	28	2.3	91.8
	Wireless technology/progress	25	2.1	93.9
	More competition among providers	19	1.6	95.5
	Jobs/banking online	16	1.3	96.8
	I don't use the Internet	13	1.1	97.9
	Social networking	13	1.1	99.0
	Faster/improved bandwidth	13	1.0	100.0
	Total	1210	100.0	

Appendix 3

In your day-to-day use of the Internet, what do you believe is your greatest personal obstacle? [Open-ended]

		Frequency	Per cent	Cumulative per cent
Valid	Unsure	386	31.9	31.9
	No obstacles	212	17.5	49.4
	Lack of digital literacy	110	9.1	58.5
	Speed of Internet connection	80	6.6	65.0
	Other	75	6.2	71.2
	Don't use Internet	67	5.5	76.8
	Spend too much time on Internet	61	5.1	81.8
	Spam and viruses	52	4.3	86.1
	Affordability of access	38	3.2	89.3
	Access to broadband	33	2.8	92.1
	Security and stability	33	2.7	94.8
	Privacy	15	1.3	96.1
	Net neutrality	15	1.2	97.3
	Language barrier	12	1.0	98.3
	Cyber-crime	10	.9	99.2
	Canada's technical infrastructure	10	.8	100.0
	Total	1210	100.0	

Appendix 4

What personal benefit do you believe the Internet offers you in your day-to-day use of it?
[Open-ended]

		Frequency	Per cent	Cumulative per cent
Valid	Access to information/knowledge	387	32.0	32.0
	Communication/staying in touch with people	203	16.8	48.8
	Unsure	171	14.2	63.0
	Education and research	98	8.1	71.0
	Other	78	6.4	77.5
	Quick and convenient	54	4.5	82.0
	Online banking/transactions	45	3.7	85.7
	Don't use/have the Internet	45	3.7	89.4
	Global connection	32	2.6	92.0
	News	28	2.3	94.4
	Use it for work/work from home	24	2.0	96.4
	Social media/networking	22	1.9	98.2
	Nothing	22	1.8	100.0
	Total	1210	100.0	