

Government Online

an international perspective



2001 Benchmarking Research Study

Introduction

- Taylor Nelson Sofres (TNS) is the fourth largest market information company in the world, listed on the London Stock Exchange with offices in over 50 countries.
- TNS' clients span a wide range of interests, including Social and Government research.
- Every year TNS holds an international conference for its Social and Government researchers to exchange ideas and learn from the experience of others.
- In 2001, this conference was held in Berlin during which there was considerable discussion about the impact of the Internet on Government at all levels. TNS researchers felt there was a gap in their client's information regarding the use of government services online (e-government) and, as a result, this study was conceived. This study's objective was to provide global and national benchmarks.
- This study has been funded by the 27 TNS offices who participated, with the coordination and global report writing provided by Australia. It is anticipated that this study will be repeated in future by TNS, in order to assist our clients to better understand the environment in which they operate.
- Earlier in 2001, TNS undertook a major global study of Internet usage. These results have already been publicly released. (www.tns Sofres.com/ger2001) Reference to those results has been made in this report to provide contextual information.
- For more information about the e-government study, please contact your local TNS office or email gostudy@au.tns Sofres.com to be put in touch with the relevant contact in your country.

Study Objectives

- The key aim of this study is to understand the impact of the Internet on government globally and nationally.
- More specifically the study objectives are to...
 - Establish a benchmark against which to measure future growth of e-government, globally and nationally.
 - Measure the ‘adoption curve’ for the utilisation of government services online, from information seeking to engaging in some sort of transaction.
 - Understand whether e-government is reaching the broader community in terms of demographics.
 - Determine any levels of fear associated with providing government with personal information over the Internet, and the extent to which this may be a barrier to e-government uptake.
 - Provide global and national benchmarks against which individual government departments can measure themselves against in terms of:
 - reach;
 - adoption;
 - demographic characteristics; and
 - concerns over safety of personal information.

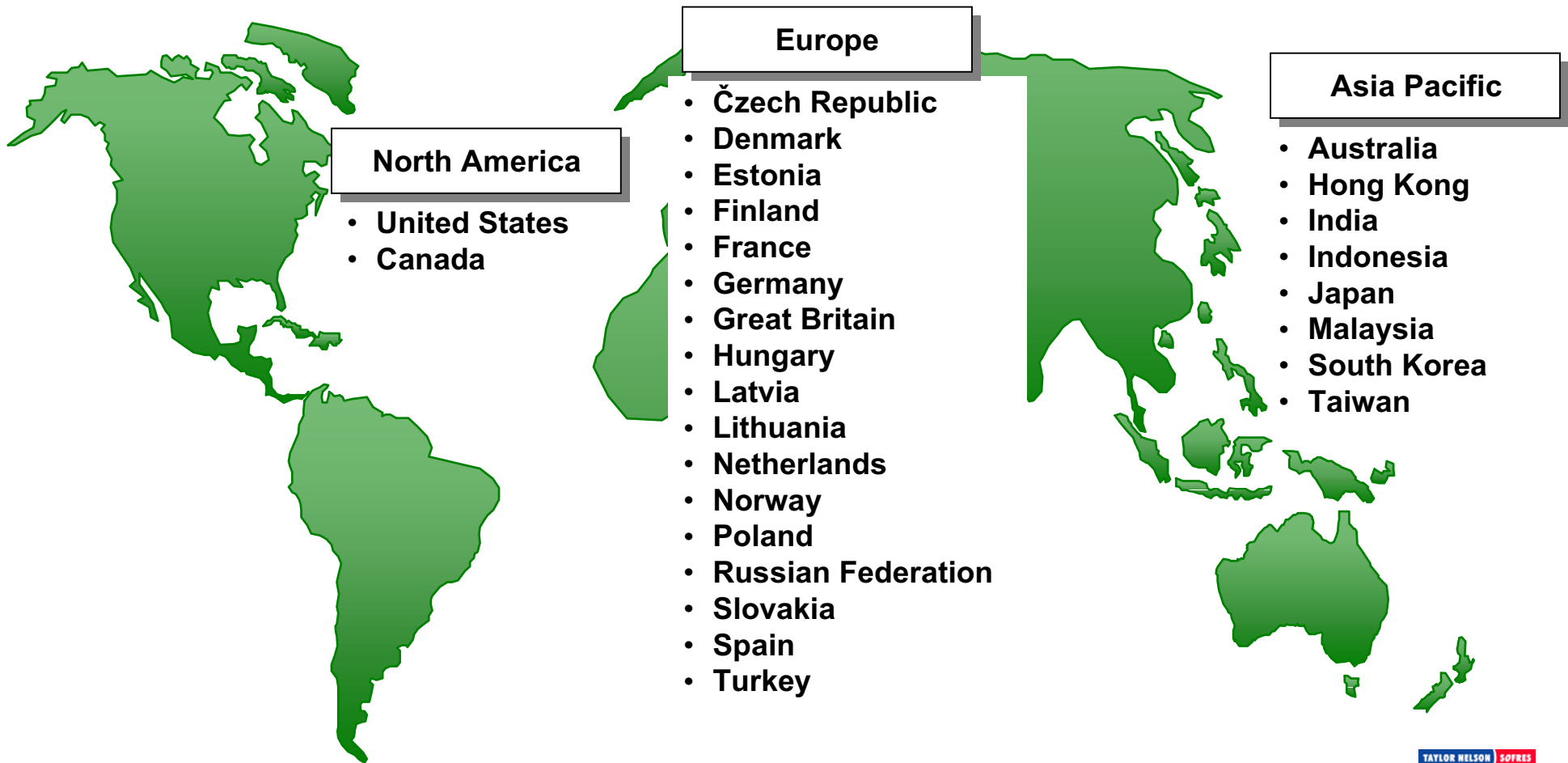
Methodology

- One identical question about the use of government services online was placed on a substantial, nationally representative survey in 27 countries between July and September 2001*. All field work was conducted by TNS offices.
- An optional second question, regarding perceptions of safety when providing personal information to Government was asked of everyone in 20 countries, and asked of Internet users in five countries.**
- Across the 27 countries, a total of 29,077 people have been interviewed.
- All country results have been weighted to be representative of their country population.
- This report was prepared by Wendy Mellor, Victoria Parr and Michelle Hood, TNS Australia.

* India And Hungary Only Sampled Internet Users

** India, Hungary, Indonesia, Russian Federation and Spain

The 27 Countries Covered



Report Definitions And Glossary

- **Information Seekers** - Have used the Internet to get information from a Government website.
- **Downloaders** - Used the Internet to print off government forms that were then sent by post or fax (e.g. tax form, form to claim Government rebates).
- **Providers** - Used the Internet to provide personal/household information to Government.
- **Transactors** - Used the Internet to pay for Government services or products through the use of a credit card or bank account number (e.g. rates, driving licences, recycle bins, traffic fines).
- **Non-users** - Have not used the Internet to get or provide information or transact with Government.
- The '**adoption curve nets**' have assumed that the highest level of e-government use is a Transactor, the next highest a Provider, then a Downloader and least is only an Information Seeker. In other words, people's highest level of adoption has been plotted.
- "**e-government**" refers to any usage of Government Online

Key Results And Discussion Points

What are the levels of e-government usage?

- Of the 27 countries surveyed, Norway has the highest level of e-government (53% over the last 12 months) and Internet usage (63% in last month).
- The average for e-government usage is 26% across the general global population. There is wide variation in the level of e-government uptake across all the countries measured (3% Turkey - 53% Norway).
- The high e-government user countries include: Norway, Denmark, Canada, Finland, USA, Hong Kong, Australia and the Netherlands.
- The countries with low levels of e-government usage include: Indonesia, Russian Federation, Turkey, Poland, Lithuania, Slovakia, Latvia, Malaysia and Great Britain.
- Whilst Internet penetration is strongly correlated with age (the younger you are the more likely you are to use the Internet), this is not the experience of e-government. e-government usage is strongest among 25-34 year olds and it tends to plateau between 35-54 year olds. Men are more likely to use e-government but gender differences globally are not strong.

Key Results And Discussion Points

How is e-government being used?

- The major use made of e-government is Information Seeking (20%) and as many as 41% Norwegians have got information from a Government website over the previous 12 months. Other countries with high e-government Information Seeking levels are Denmark (39%), Finland (37%), Canada (36%) and Hong Kong (27%).
- Over the last 12 months, 9% of the global population has used the Internet to print off Government forms (Downloaders); 7% have used the Internet to provide personal or household information to Government (Providers).
- 6% of the global population have used the Internet to pay for Government services or products involving the use of a credit card or bank account number. 19% of Norwegians have used the Internet in the last 12 months for this sort of e-government transaction and this is the highest level recorded anywhere in the world. Other countries with relatively high e-government transactions are Finland (17%), Estonia (16%), Denmark (15%) and Canada (10%).
- Almost one in five (19%) of Internet users globally are e-government Transactors. This compares favourably with the incidence of online product shoppers (15% on Internet users)

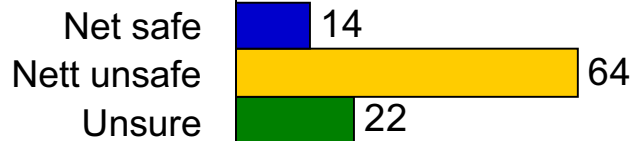
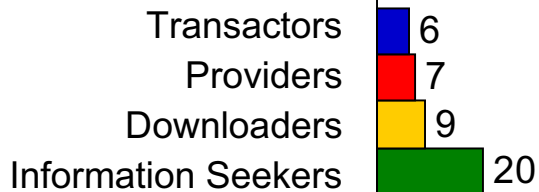
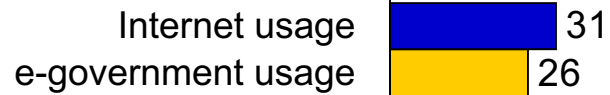
Key Results And Discussion Points

Are safety issues a barrier to e-government uptake?

- Concern about safety when providing Government with personal information such as a credit card, bank account number or salary size is substantial. 64% of the total adult population globally said they felt unsafe using the Internet for this purpose. More say 'unsafe' (47%) than say 'very unsafe' (17%).
- Only 14% of the global adult population said they felt safe, and few (1%) felt 'very safe'.
- Countries with the highest levels of perceived safety are Finland (37%), Hong Kong (32%), Denmark (31%), Canada (30%) and Estonia (27%). Four of these countries are also in the top 5 countries for e-government transacting.
- There are higher levels of safety perceived by under 25 years olds and males.
- More non-users consider government online to be unsafe (62%) rather than safe (19%) while a further fifth (18%) had no opinion. Information Seekers globally have the greatest concern about safety (76%). However even among Transactors there is concern (63%), despite them having used the Internet with their credit card or their bank account number to transact with Government. This suggests that security is an issue, but it does not necessarily prevent a person from transacting on the Internet. So whilst it is a concern, it is not always a barrier to uptake.
- Countries with the highest concerns about safety are Germany (85%), Japan (84%), France (84%), USA (72%) and the Czech Republic (72%).
- The greatest safety concerns are among women and those aged 25-44 years.

Key Numbers

Globally...



0 50 100

Lowest

Highest

Indonesia 4%
Turkey 3%

Norway 63%
Norway 53%

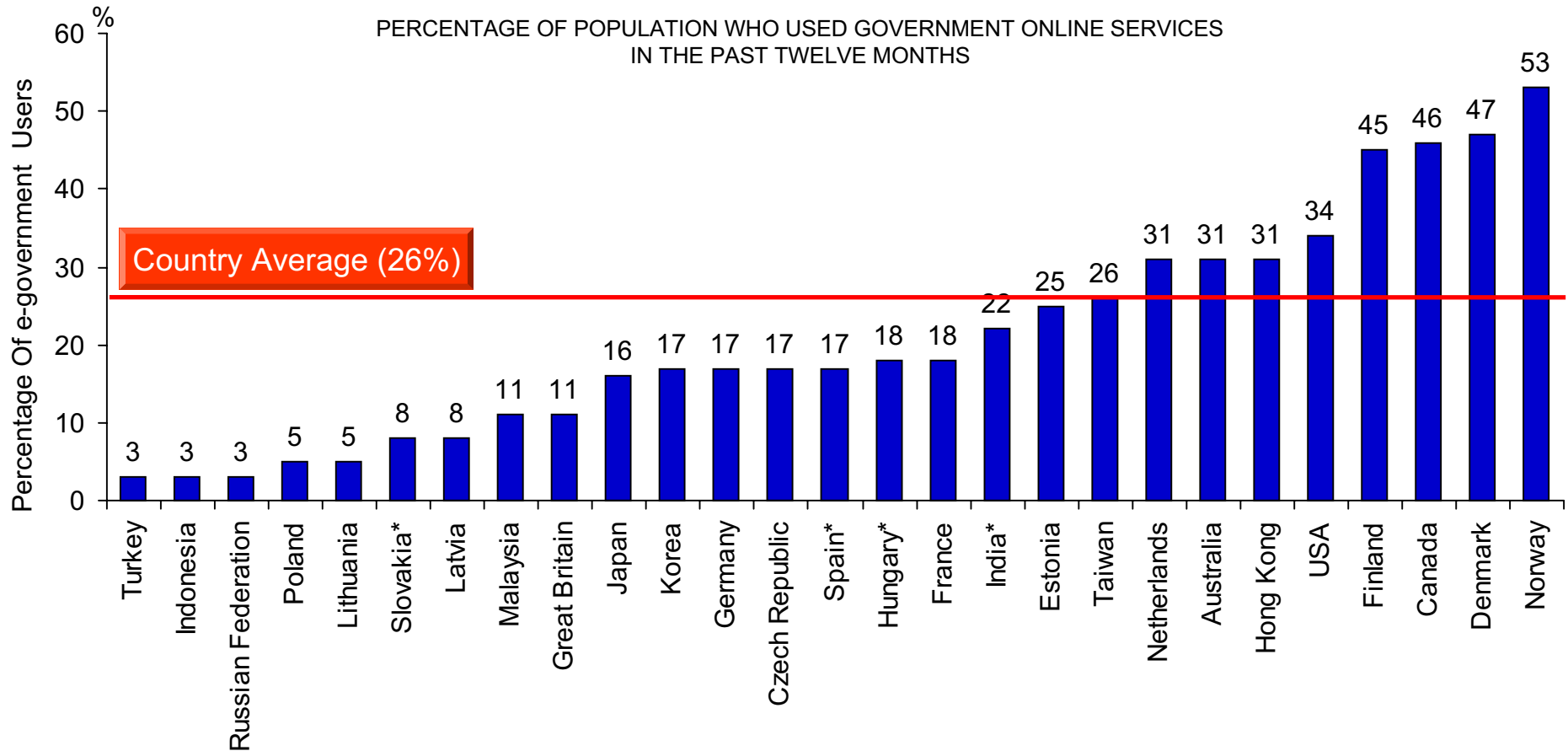
Indonesia 0%
Turkey 0%
Turkey 1%
Turkey 2%

Norway 19%
Denmark 21%
Norway 22%
Norway 41%

Japan 6%
Lithuania 35%
Germany 1%

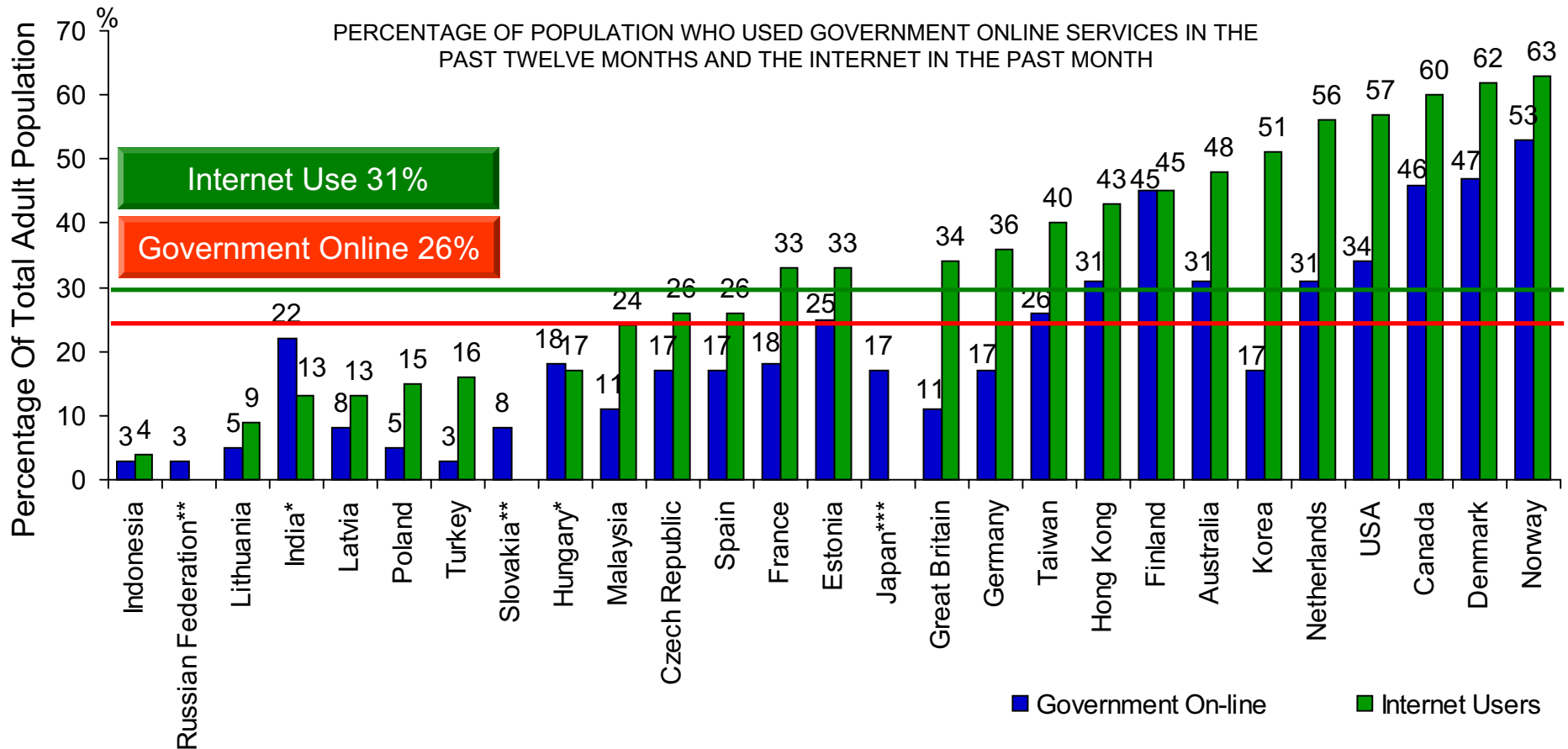
Finland 37%
Germany 85%
Lithuania 49%

What Is The Level Of Government Online Use In 2001?



* Due to sampling differences Slovakia, Spain, Hungary and India have not been included in the Global Nett

How Does Government Online Compare To Internet Use In The World In 2001?



* Government online usage based on internet users not total population ** Internet usage data not available

***Japan 2001 Internet usage results, data collected in a different TNS study = 68%

Who Are The Heavy And Light Government Online User Groups?

Low Penetration

(less than 15% are users)

- Indonesia
- Russian Federation
- Turkey
- Poland
- Lithuania
- Slovakia
- Latvia
- Malaysia
- Great Britain

Medium Penetration

(15% to 30% are users)

- Taiwan
- Estonia
- India
- France
- Hungary
- Spain
- Czech Republic
- Germany
- Japan
- Korea

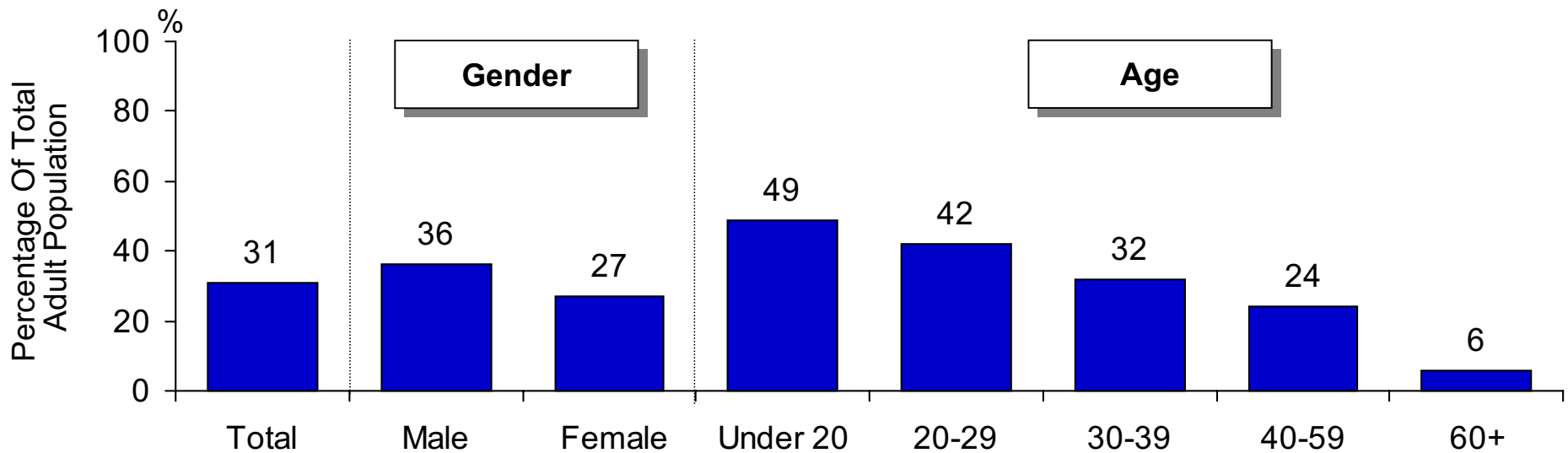
High Penetration

(more than 30% are users)

- Norway
- Denmark
- Canada
- Finland
- USA
- Hong Kong
- Australia
- The Netherlands

Who Uses The Internet?

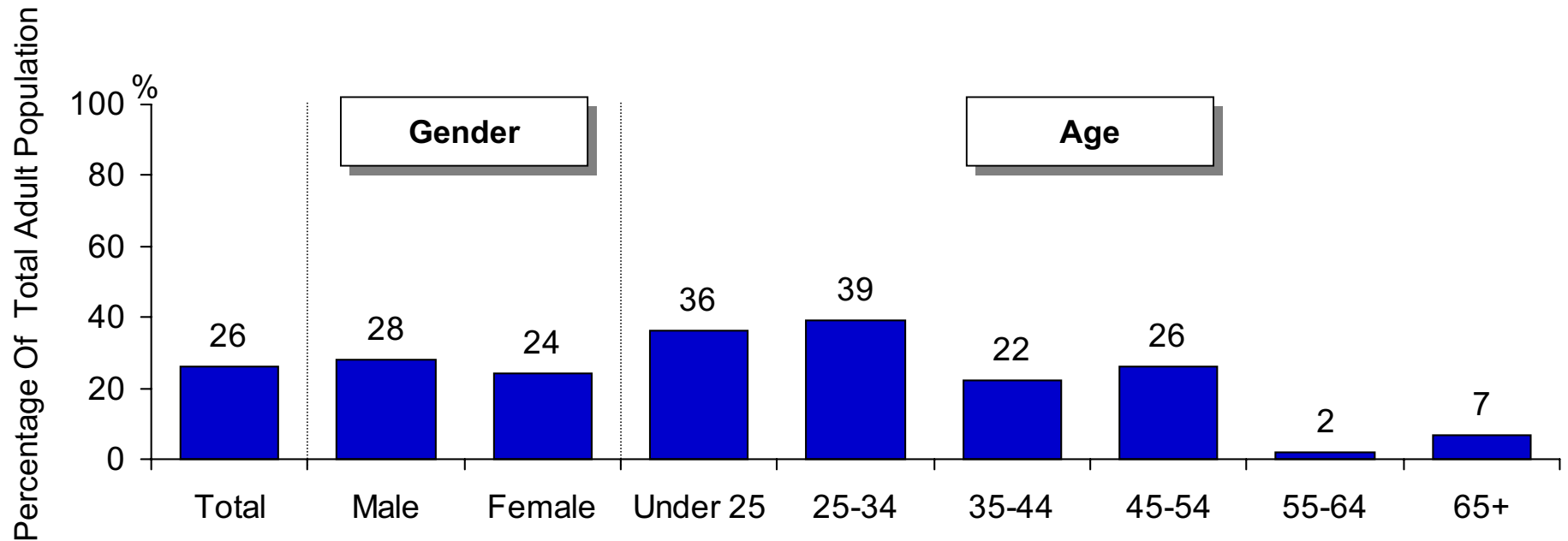
- A very large percentage of the younger adult population have used the Internet in the past month. The total penetration figures are reduced by the general trend of an ageing population and their non-use of the Internet.
- Men are still more likely to have used the Internet than women, although this differs greatly across countries and cultures.



Please note that percentages given for the different age groups exclude data from Portugal, France, Canada, Ireland, Israel and Japan - where different age bands are used

Who Uses Government Online?

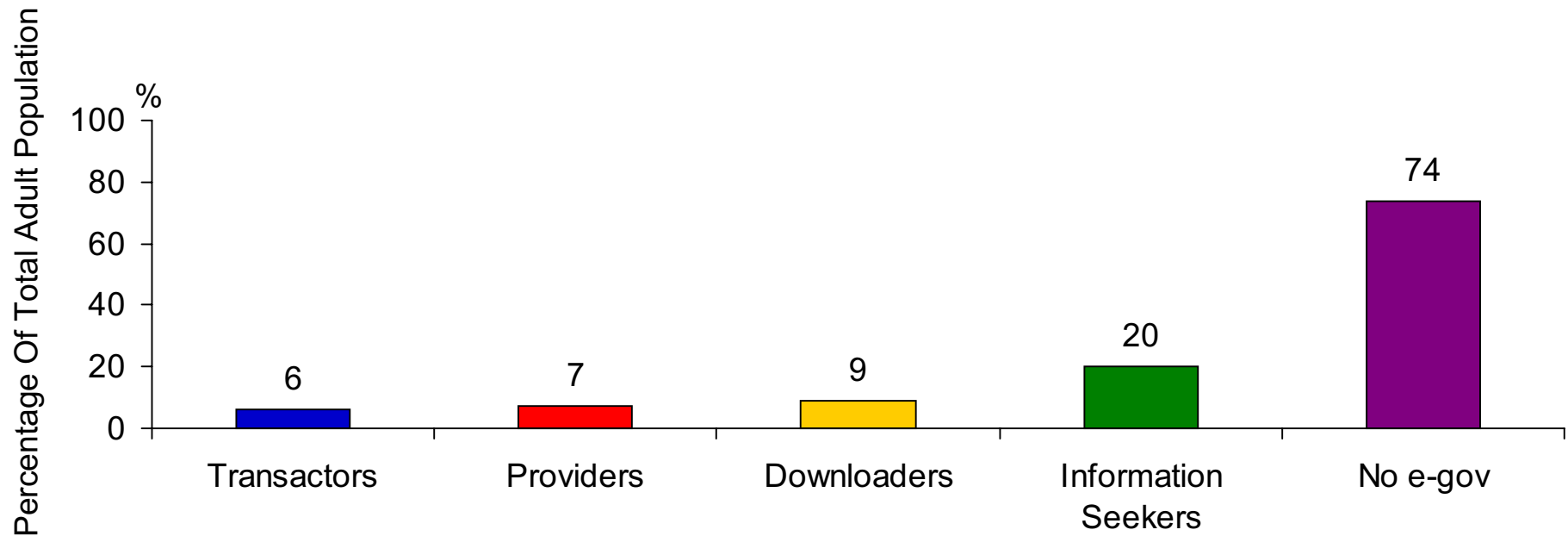
- e-government usage is strongest among 25-35 year olds. Usage plateaus among 35-54 year olds.
- Men are more likely to use e-government but gender differences are not strong.



Please note that percentages given for the different age groups exclude data from India, Hungary, Slovakia and Spain - where samples were not compatible

What Is The Level Of Involvement With Government Online?

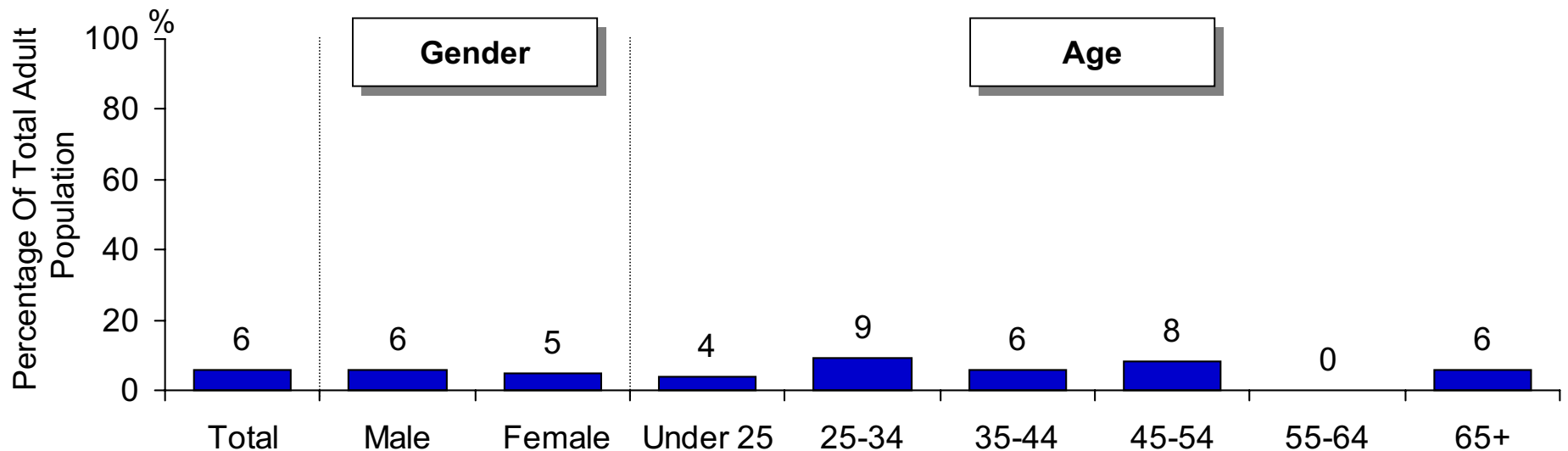
- Information Seeking is currently the most common use of e-government worldwide.
- Transacting is currently the least common.



Note: This is multiple response data

Government Online User Demographics - Transactors

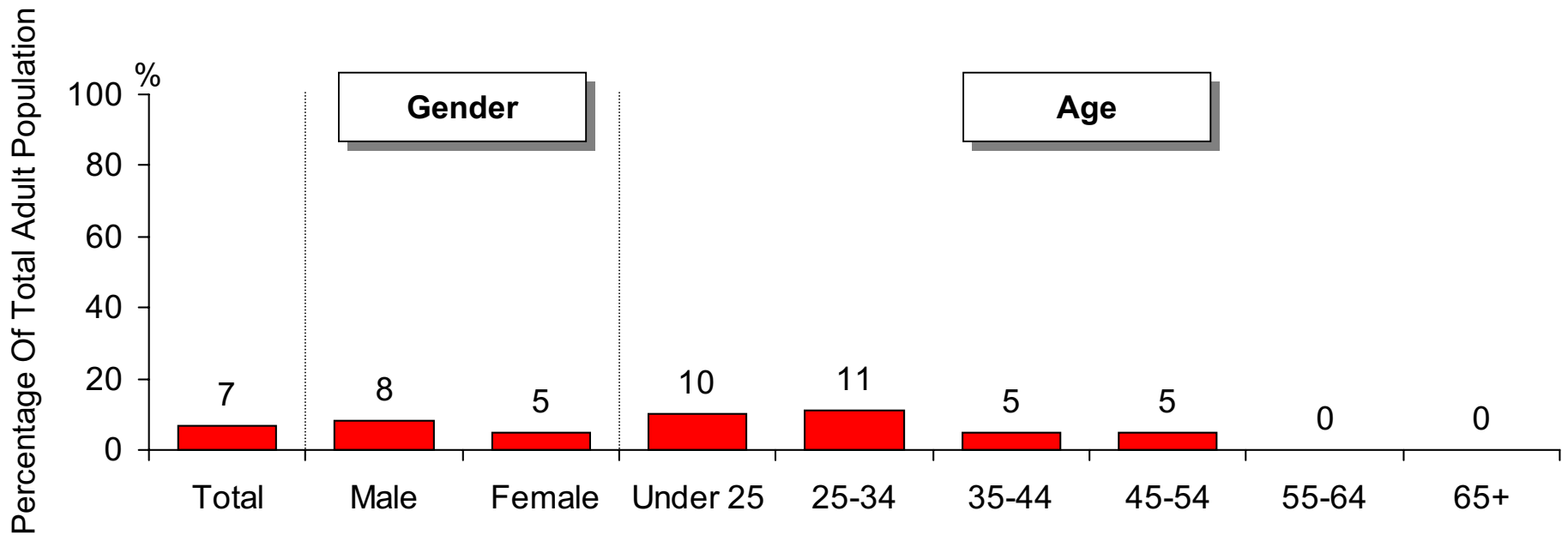
- Transactors are less likely to be aged under 25 years old than between 25-54 year olds..
- e-government transacting is significant among those aged 65+ years and older.
- There are no gender differences.



Please note that percentages given for the different age groups exclude data from India, Hungary, Slovakia and Spain - where samples were not compatible

Government Online User Demographics - Providers

- Information providers are more commonly found among those 34 years of age and under.

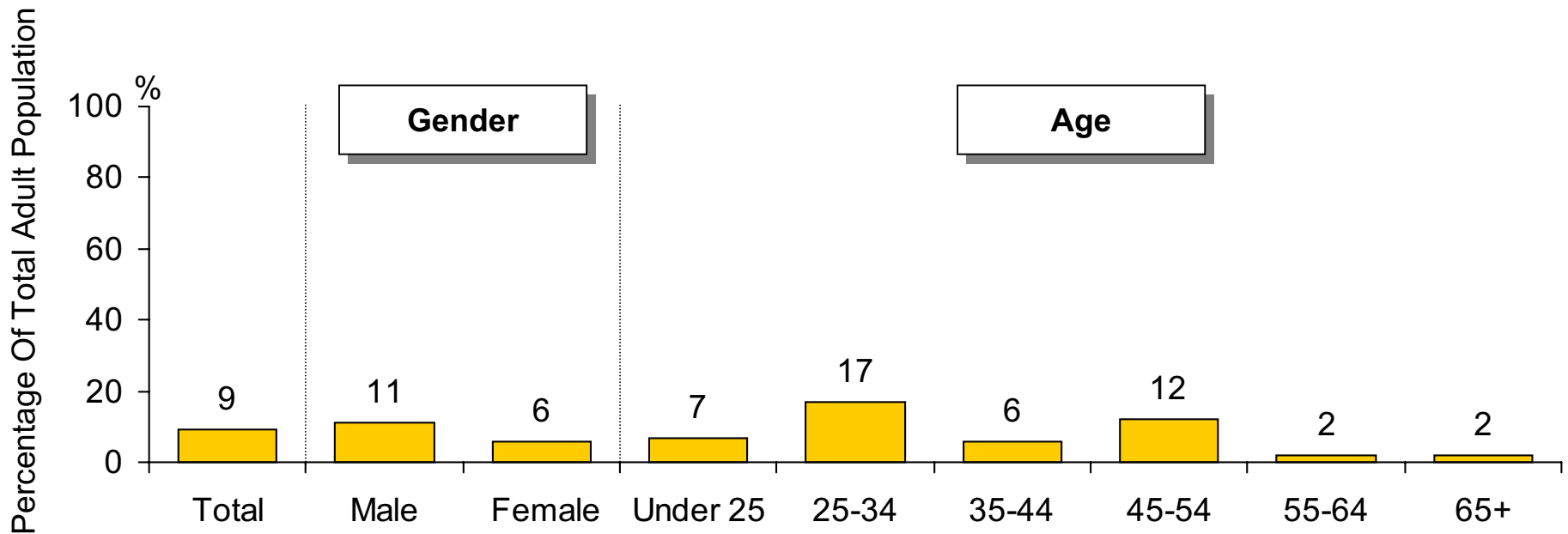


Please note that percentages given for the different age groups exclude data from India, Hungary, Slovakia and Spain - where samples were not compatible



Government Online User Demographics - Downloaders

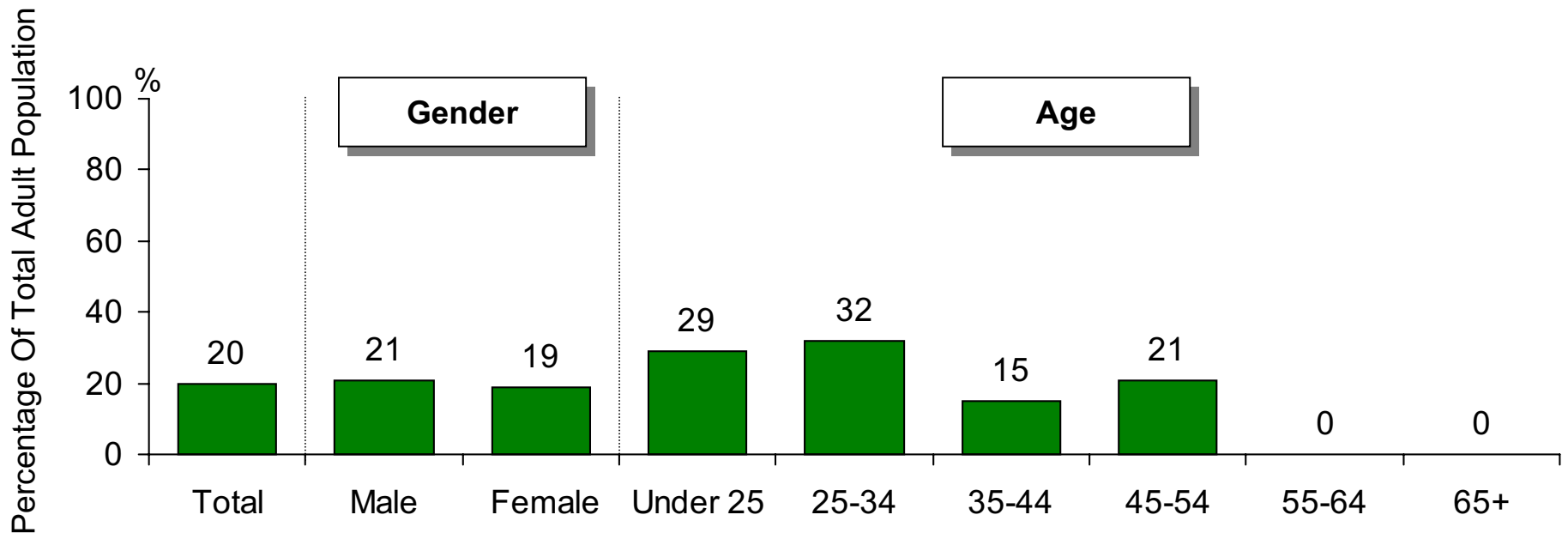
- Those using the Internet to download government forms tend to be aged between 25-34 years. 45-54 year olds are also above average on downloading.
- Females are less likely to download forms although gender differences are not large.



Please note that percentages given for the different age groups exclude data from India, Hungary, Slovakia and Spain - where samples were not compatible

Government Online User Demographics - Information Seekers

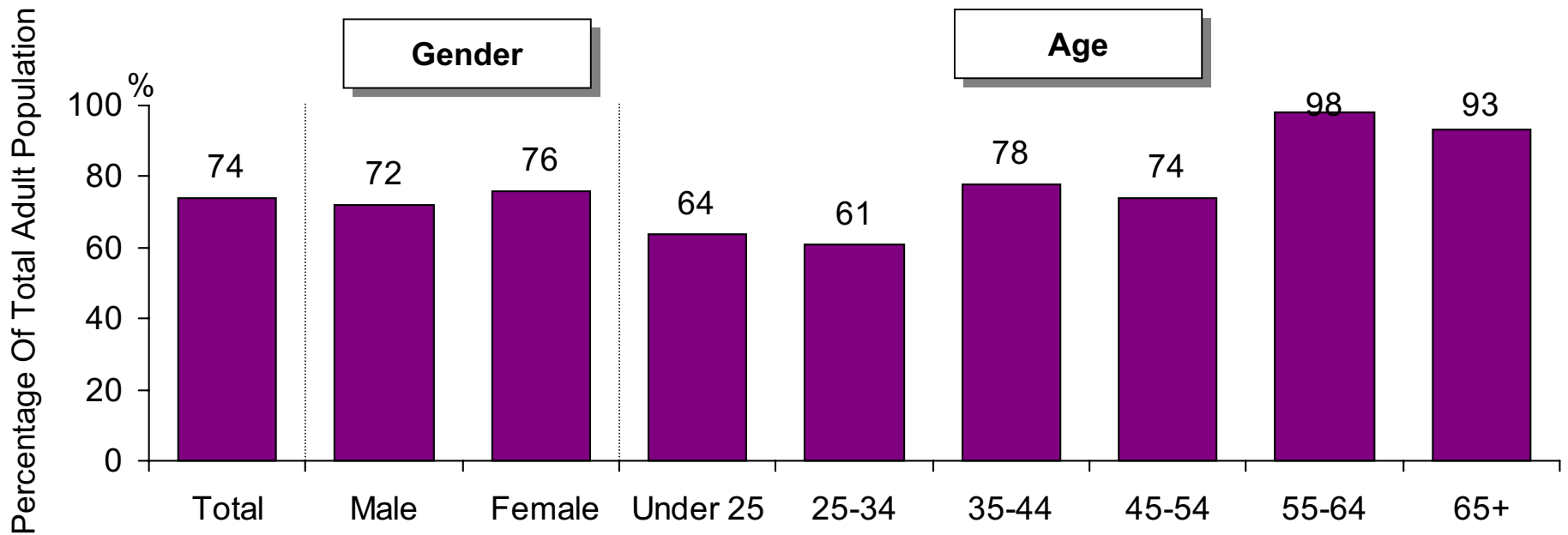
- Those aged under 34 years undertake significant information seeking of Government information through the Internet.
- One in five 45-54 year olds (21%) are Information Seekers.



Please note that percentages given for the different age groups exclude data from India, Hungary, Slovakia and Spain - where samples were not compatible

Government Online User Demographics - Non Users Of e-government

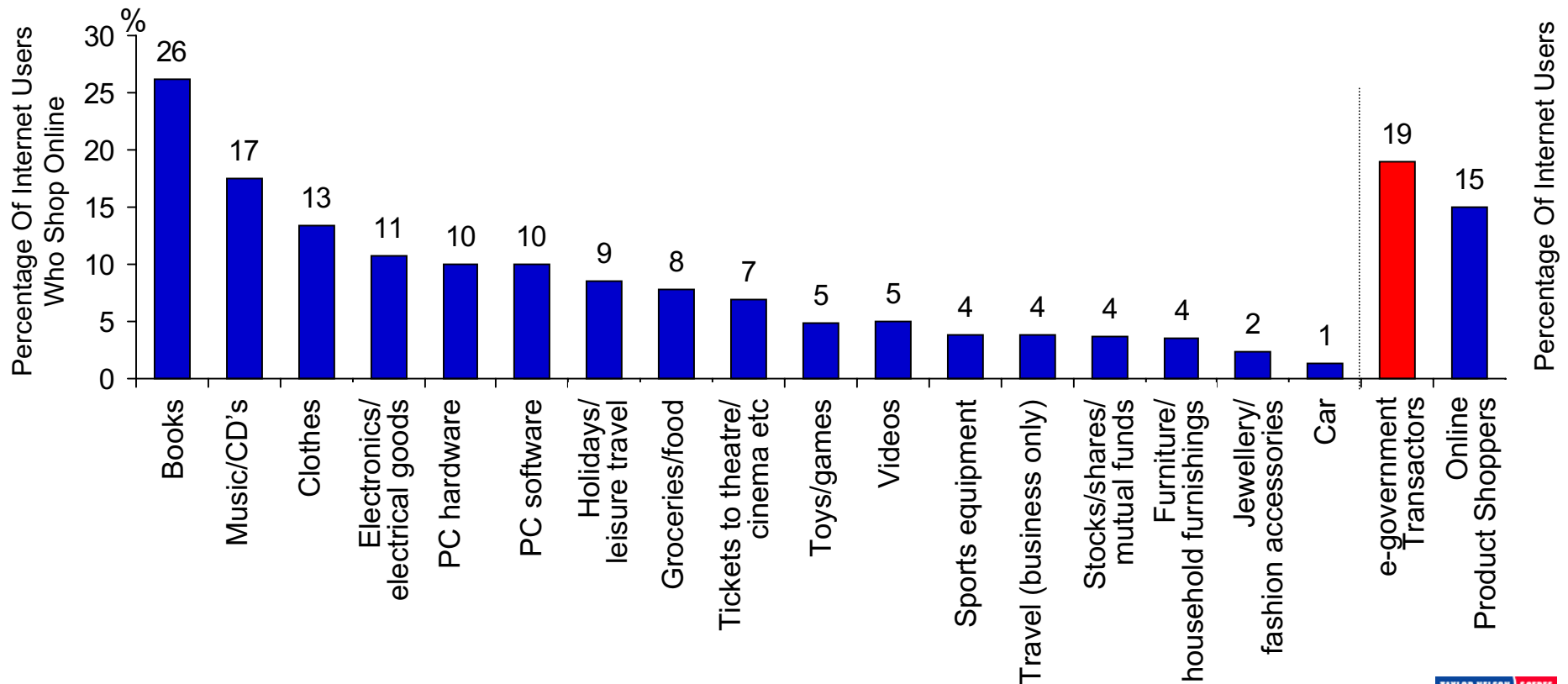
- Currently e-government is less likely to be used among people 55 years and over.
- There are many opportunities for people of all ages to be introduced to e-government.



Please note that percentages given for the different age groups exclude data from India, Hungary, Slovakia and Spain - where samples were not compatible

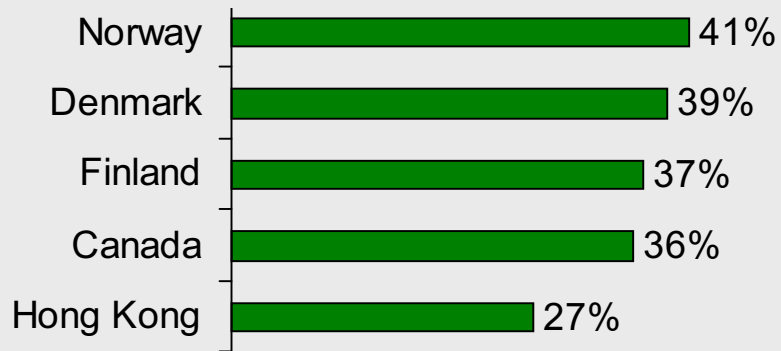
How Does Government Online Transacting Compare To Other Online Transacting?

- 19% of Internet users have made an e-government transaction in the last twelve months.
- This compares very favourably with purchase of goods over the Internet.

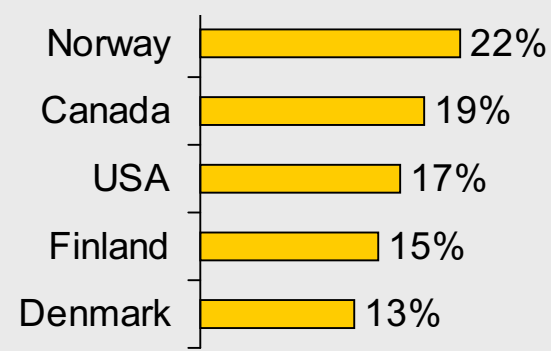


Which Countries Do The Most Interacting With Government Online?

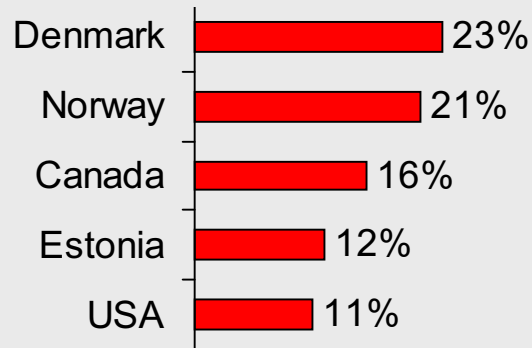
Information Seeking



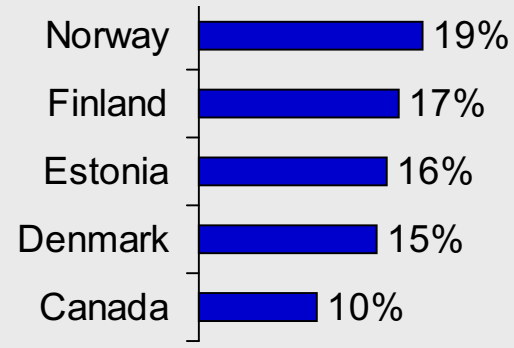
Downloading



Providing



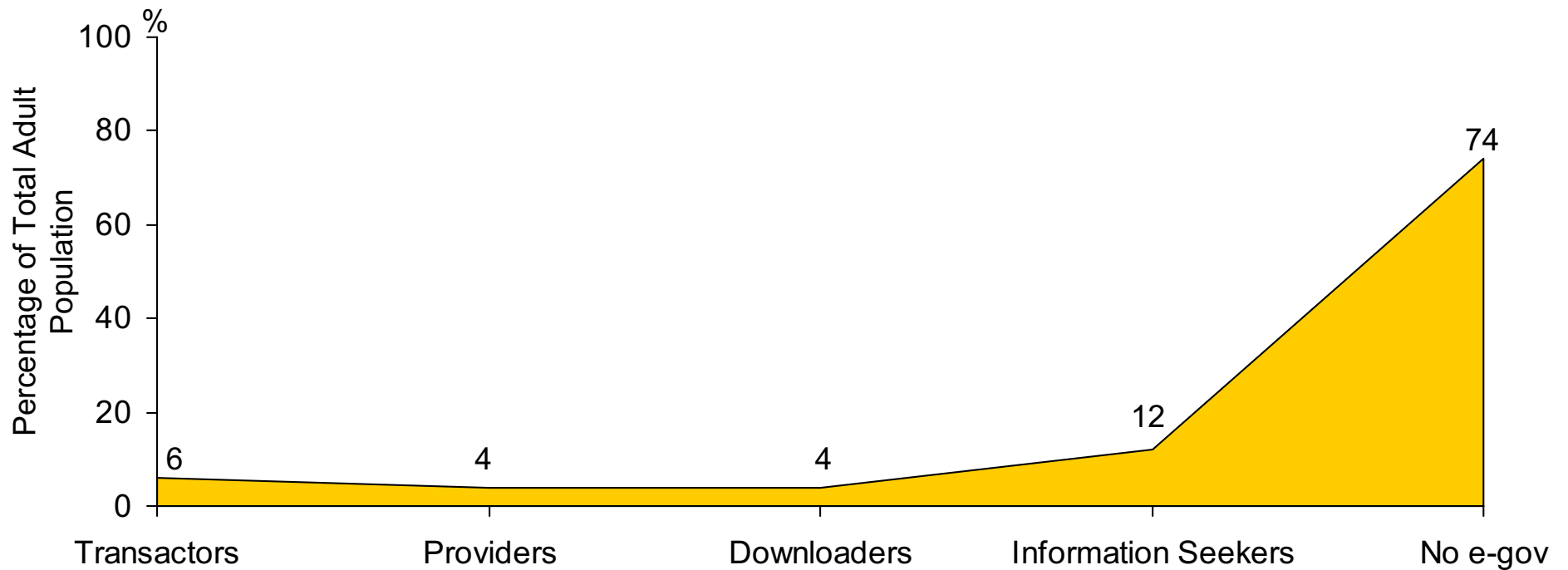
Transacting



Percentage of all adults using e-government activities

What Is The Global Government Online Adoption Curve?

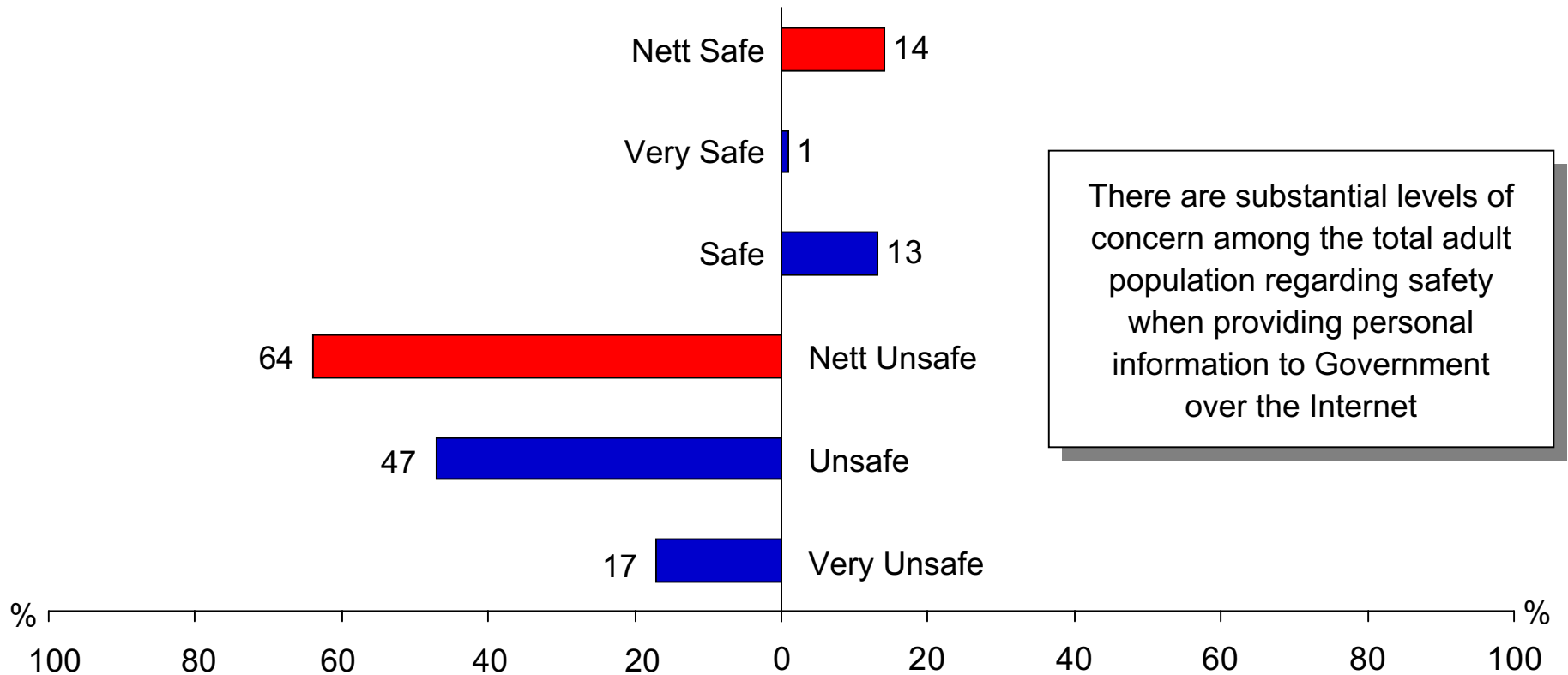
- 12% of total population only information seek.



Highest level on usage achieved

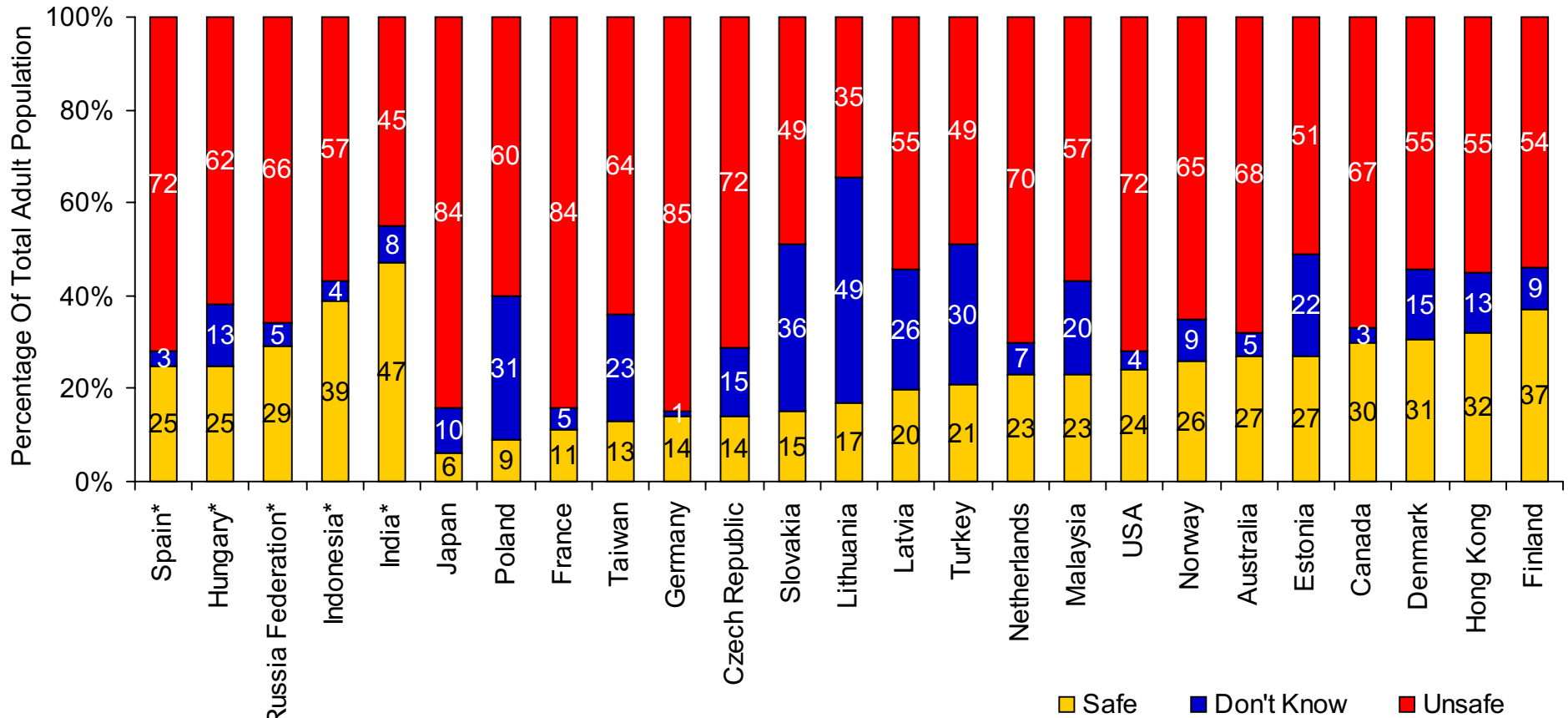
What Is The Perception Of Government Online Safety?

Global Nett Safe And Specifics, Nett Unsafe And Specifics



Please note that percentages given exclude data from India, Hungary, Indonesia, Russian Federation and Spain - where samples were not compatible

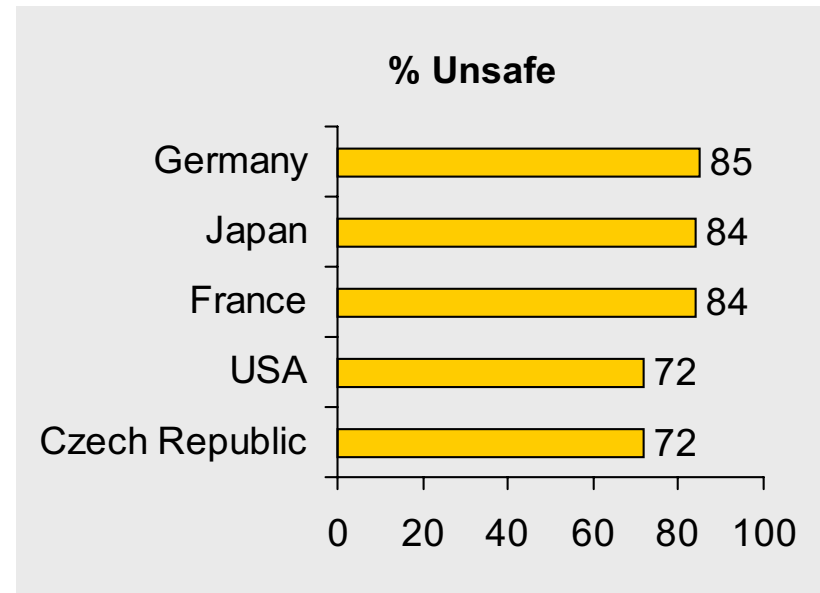
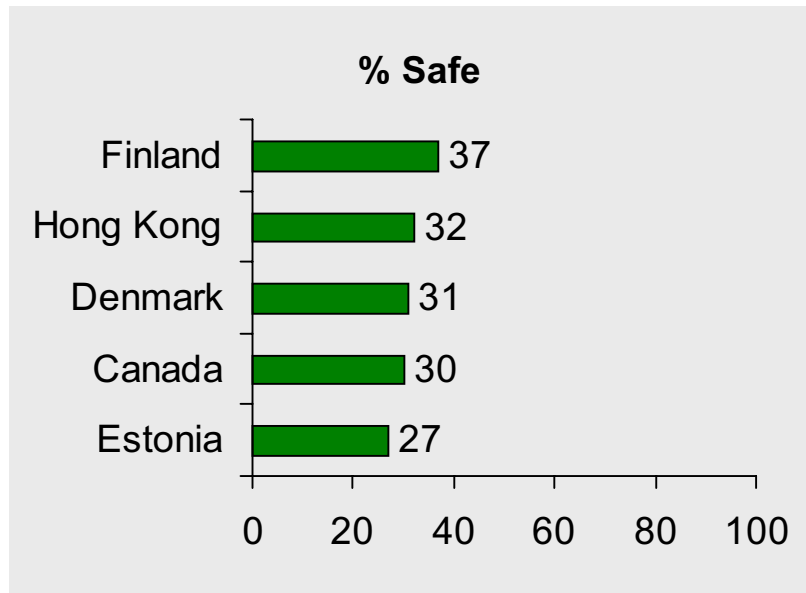
What Is The Perception Of Government Online Safety?



*Data from Hungary, Russian Federation, Indonesia, India and Spain is based on Internet users only

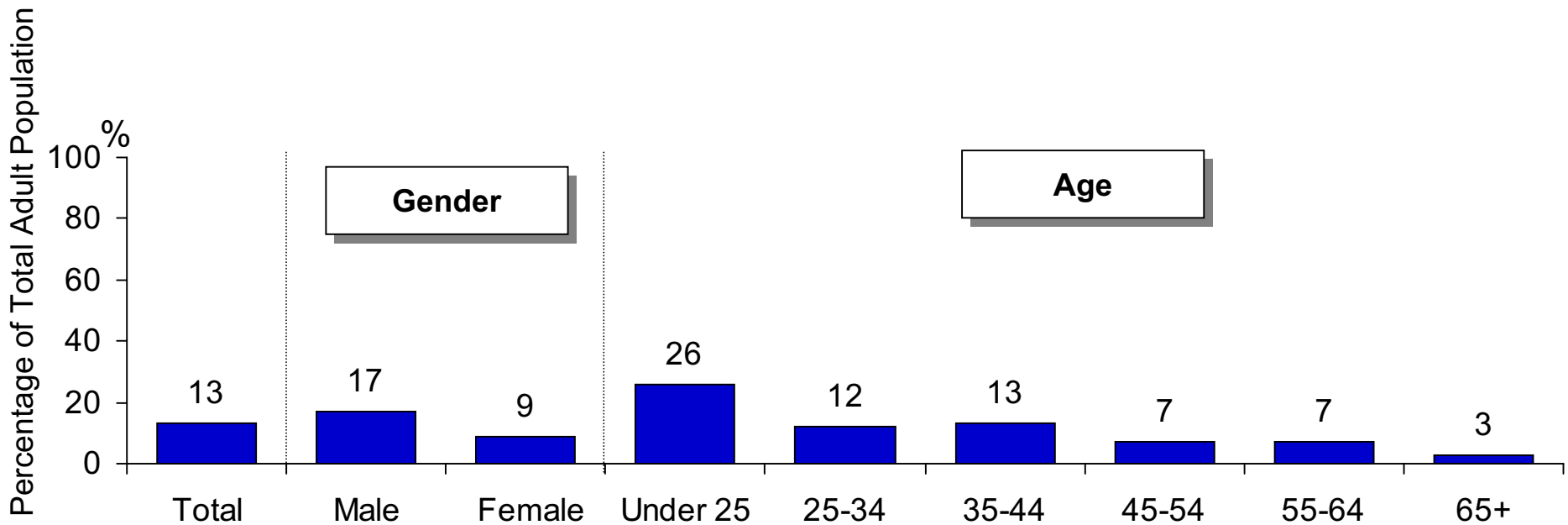
Which Countries Consider Government Online To Be...?

Base: Total Adult Population



Who Thinks Government Online Is Safe?

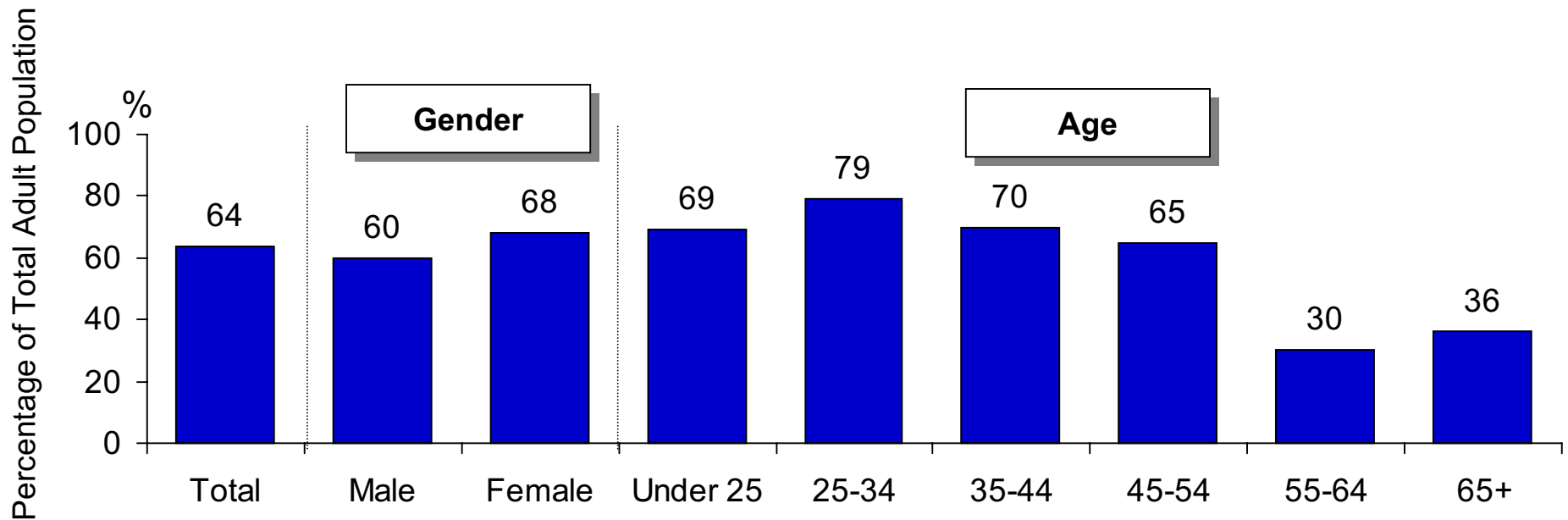
■ Males and people aged under 25 years are more likely to consider e-government as safe.



Please note that percentages given exclude data from India, Hungary, Slovakia, Indonesia, Russian Federation and Spain - where samples were not compatible

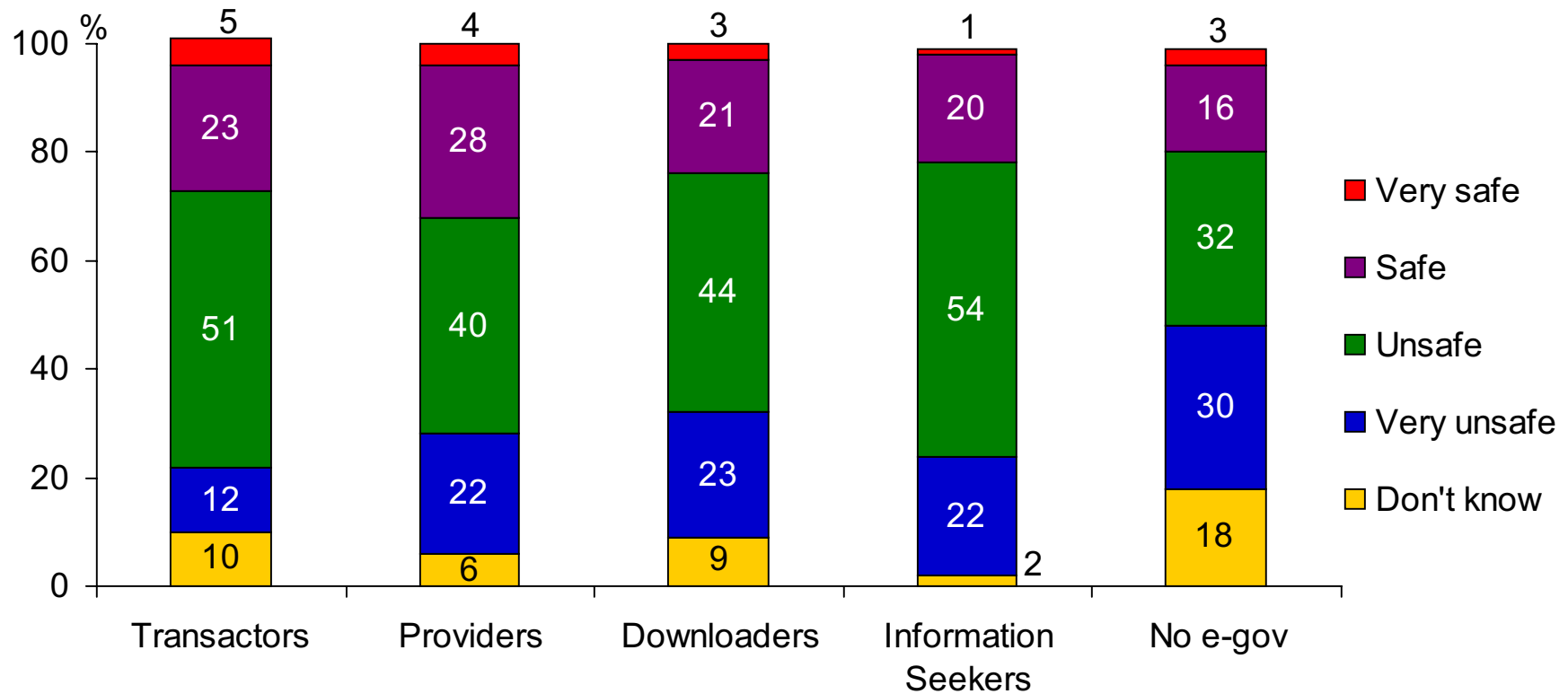
Who Thinks Government Online Is Unsafe?

- Concerns over safety are stronger among women and those aged between 25-34 years.



Please note that percentages given exclude data from India, Hungary, Slovakia, Indonesia, Russian Federation and Spain - where samples were not compatible

Is Safety A Barrier To Adoption?



Note that percentages given exclude data from India, Hungary, Slovakia, Indonesia, Russian Federation and Spain - where samples were not compatible

Appendices

The Questionnaire

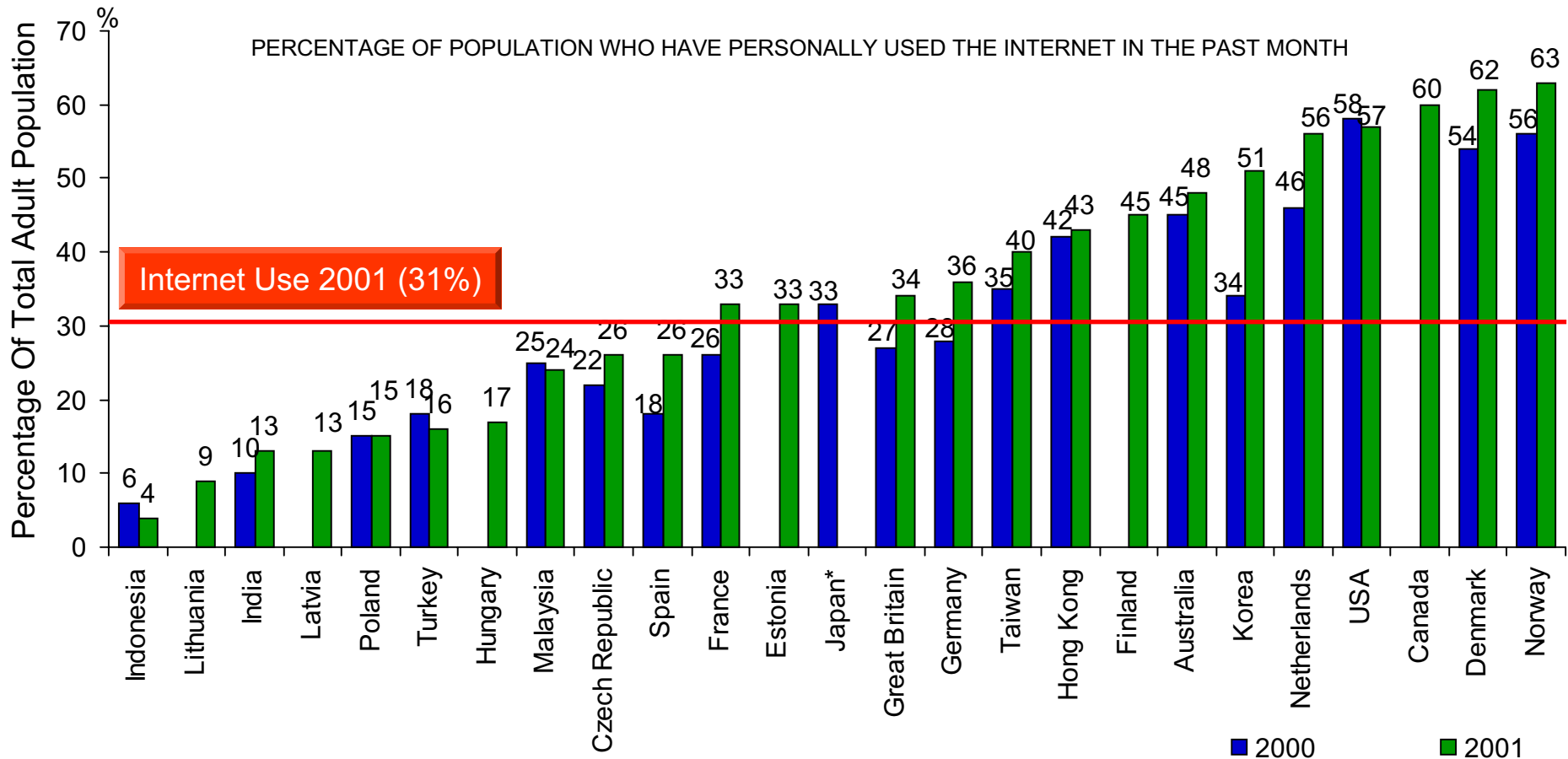
Now I'd like to talk to you about Government information and services. By Government I mean local, State and Federal (tailor to country)...

- In the last twelve months, have you yourself used the internet to...
 - Get information from a Government website?
 - Used the Internet to print off Government forms (e.g. tax form, form to claim a government rebate) which you have then sent by post or fax?
 - Used the Internet to provide personal/household information to Government (e.g. complete and lodge a tax form, apply for a service, change your address)?
 - Used the Internet to pay for Government services or products (e.g. rates, driving license, recycle bins, traffic fine) involving the use of a credit card or your bank account number?
 - None of these?

Now I'd like you to think of a situation where you were asked to provide some personal information (for example, your credit card number, your bank account number, the size of your salary) to a Government department or agency...

- How safe would you feel about using the internet to provide the Government with this sort of personal information?
 - Very safe, safe, unsafe, very unsafe, don't know?

Internet Users Across The World 2000/2001



*Japan 2001 Internet usage results, data collected in a different TNS study = 68% Note: Russian Federation and Slovakia did not participate in the Global e-commerce Report where data is taken from

Three Groups Of Countries Based On Their Level Of Internet Penetration

Low Penetration

(less than 20% are users)

- Indonesia
- Lithuania
- India
- Latvia
- Poland
- Turkey
- Hungary

Medium Penetration

(20% to 40% are users)

- Malaysia
- Spain
- Czech Republic
- France
- Estonia
- Great Britain
- Germany
- Taiwan

High Penetration

(more than 40% are users)

- Hong Kong
- Finland
- Australia
- Korea
- Netherlands
- USA
- Canada
- Denmark
- Norway
- Japan

Reasons For Abstaining From Product Shopping Online

The biggest reasons for not purchasing products and services online are security related with 25% of abstainers stating that they didn't want to give credit card details and 21% citing general security concerns. (Please note: that 8% highlighted both of these as reasons)

