MORNING CONSULT®

IBM

URGENCY FOR TECHNOLOGY MODERNIZATION IN THE CANADIAN GOVERNMENT STUDY RESULTS

SEPTEMBER 2–10, 2021

KEY FINDINGS

1. Over nine in ten (93%) of Canadian IT decision makers are concerned, with 46% saying they are very concerned, about security risks and the potential impact of cybercrime in Canada.

2. Cybersecurity is seen as most critical to reducing government costs and improving delivery of services.

3. Nearly half of Canadian IT decision makers (49%) and government IT decision makers (47%) strongly agree that the federal government IT modernization efforts should be focused on security and data protection.

4. Around 60% of Canadian IT decision makers think it is very important for the federal government to modernize its technology and cloud infrastructure to protect the privacy of Canadians' personal data (64%) and for heightened cybersecurity (60%).

5. 50% of Canadian IT decision makers strongly agree cloud computing better helps modernize federal IT systems in terms of stronger cybersecurity. However, bureaucracy (67%), cost (65%), and party politics (65%) are seen as the greatest obstacles to technology/cloud modernization.

MODERNIZATION OF FEDERAL GOVERNMENT TECH

IMPACT OF TECH ON COST & DELIVERY OF SERVICES

CONCERNS AROUND CYBERCRIME

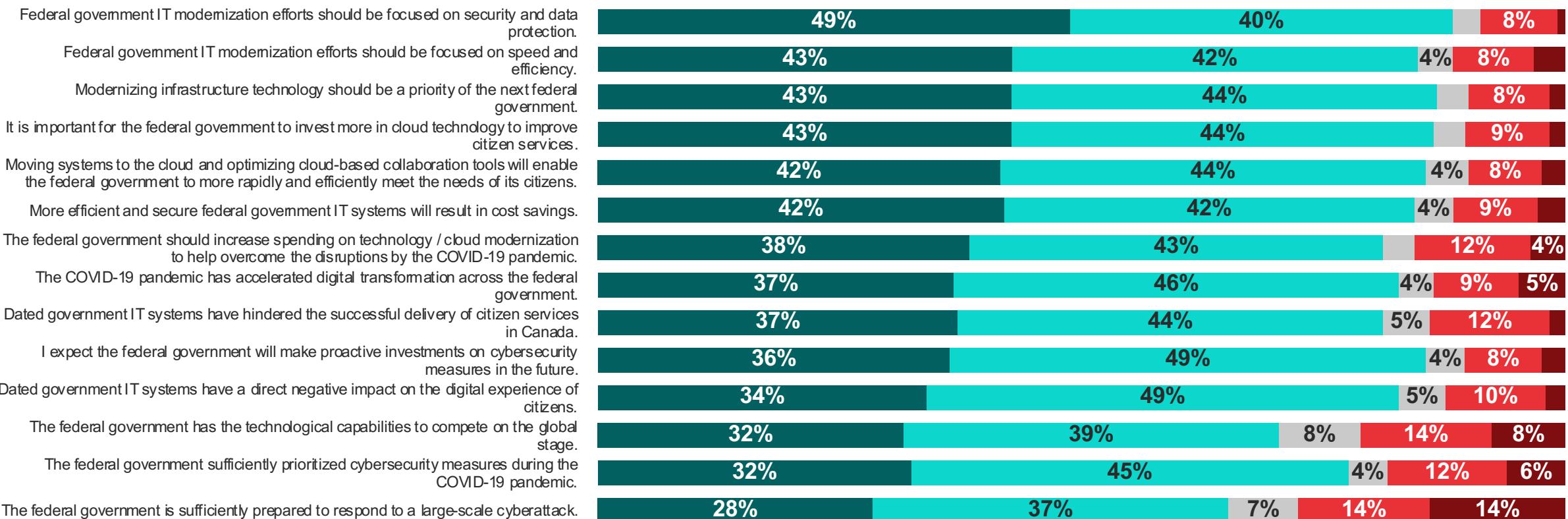# Nearly half (49%) of Canadian IT decision makers strongly agree federal government IT modernization efforts should be focused on security and data protection

To what extent do you agree or disagree with the following statements?

● Strongly agree   ● Somewhat agree   ● Don't know/Not sure   ● Somewhat disagree   ● Strongly disagree

Statement	Strongly agree	Somewhat agree	Don't know/Not sure	Somewhat disagree	Strongly disagree
Federal government IT modernization efforts should be focused on security and data protection.	49%	40%		8%	
Federal government IT modernization efforts should be focused on speed and efficiency.	43%	42%	4%	8%	
Modernizing infrastructure technology should be a priority of the next federal government.	43%	44%		8%	
It is important for the federal government to invest more in cloud technology to improve citizen services.	43%	44%		9%	
Moving systems to the cloud and optimizing cloud-based collaboration tools will enable the federal government to more rapidly and efficiently meet the needs of its citizens.	42%	44%	4%	8%	
More efficient and secure federal government IT systems will result in cost savings.	42%	42%	4%	9%	
The federal government should increase spending on technology / cloud modernization to help overcome the disruptions by the COVID-19 pandemic.	38%	43%		12%	4%
The COVID-19 pandemic has accelerated digital transformation across the federal government.	37%	46%	4%	9%	5%
Dated government IT systems have hindered the successful delivery of citizen services in Canada.	37%	44%	5%	12%	
I expect the federal government will make proactive investments on cybersecurity measures in the future.	36%	49%	4%	8%	
Dated government IT systems have a direct negative impact on the digital experience of citizens.	34%	49%	5%	10%	
The federal government has the technological capabilities to compete on the global stage.	32%	39%	8%	14%	8%
The federal government sufficiently prioritized cybersecurity measures during the COVID-19 pandemic.	32%	45%	4%	12%	6%
The federal government is sufficiently prepared to respond to a large-scale cyberattack.	28%	37%	7%	14%	14%

Nearly half of both Canadian IT decision makers (49%) and government IT decision makers (47%) strongly agree that the federal government IT modernization efforts should be focused on security and data protection

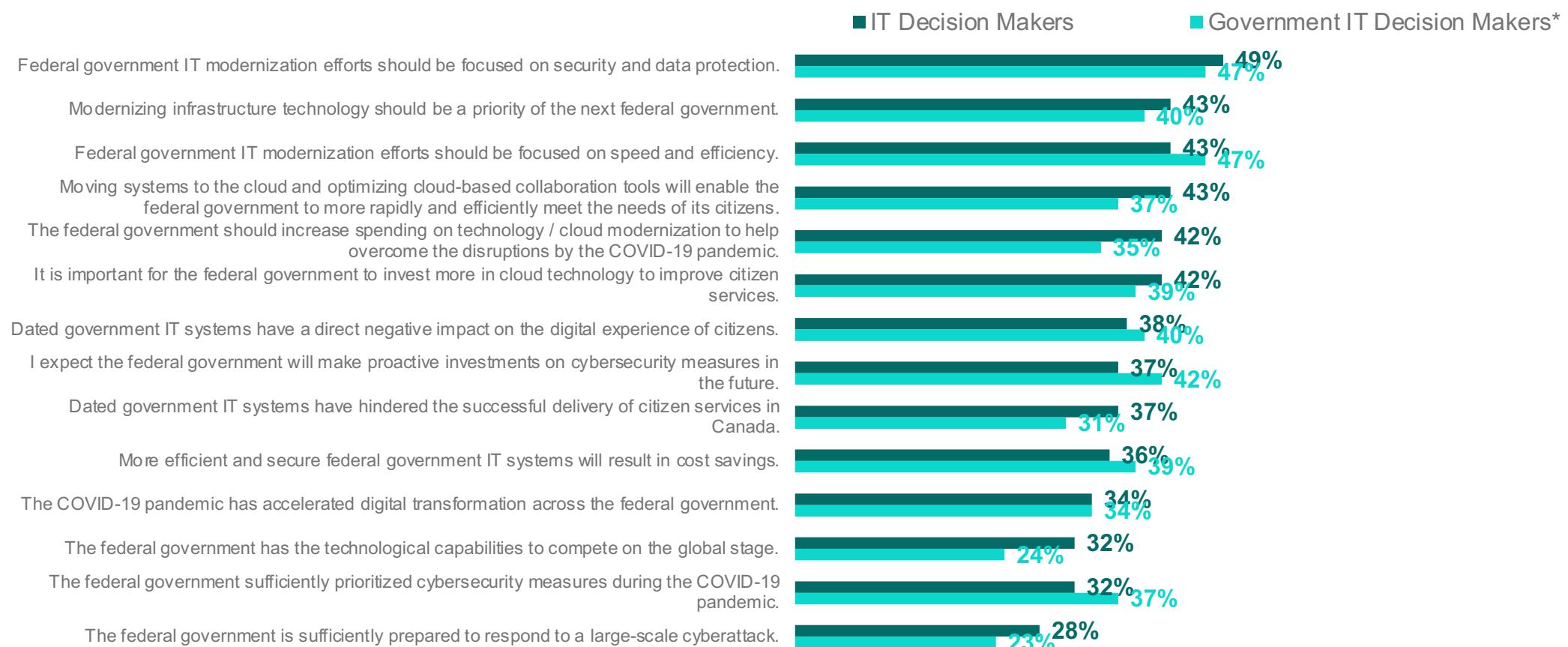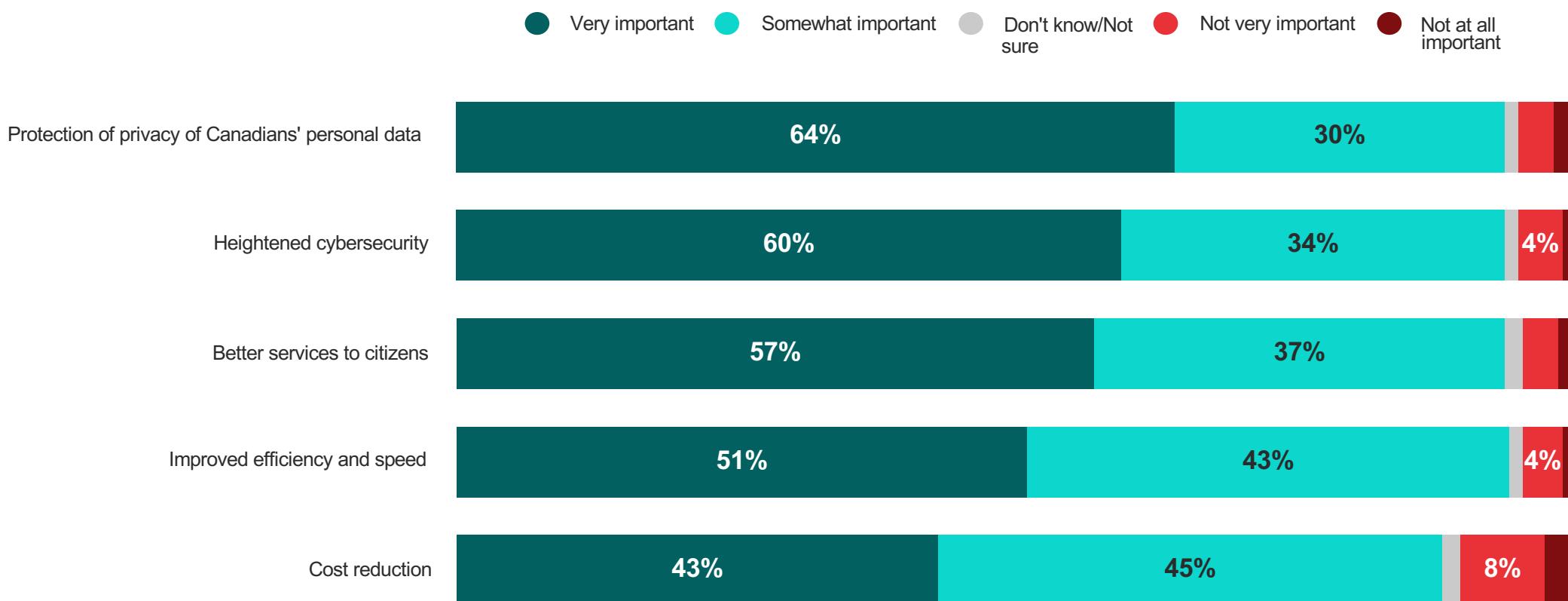To what extent do you agree or disagree with the following statements? **[Showing % Strongly agree]**

■ IT Decision Makers ■ Government IT Decision Makers*

Statement	IT Decision Makers	Government IT Decision Makers*
Federal government IT modernization efforts should be focused on security and data protection.	49%	47%
Modernizing infrastructure technology should be a priority of the next federal government.	43%	40%
Federal government IT modernization efforts should be focused on speed and efficiency.	43%	47%
Moving systems to the cloud and optimizing cloud-based collaboration tools will enable the federal government to more rapidly and efficiently meet the needs of its citizens.	43%	37%
The federal government should increase spending on technology / cloud modernization to help overcome the disruptions by the COVID-19 pandemic.	42%	35%
It is important for the federal government to invest more in cloud technology to improve citizen services.	42%	39%
Dated government IT systems have a direct negative impact on the digital experience of citizens.	38%	40%
I expect the federal government will make proactive investments on cybersecurity measures in the future.	37%	42%
Dated government IT systems have hindered the successful delivery of citizen services in Canada.	37%	31%
More efficient and secure federal government IT systems will result in cost savings.	36%	39%
The COVID-19 pandemic has accelerated digital transformation across the federal government.	34%	34%
The federal government has the technological capabilities to compete on the global stage.	32%	24%
The federal government sufficiently prioritized cybersecurity measures during the COVID-19 pandemic.	32%	37%
The federal government is sufficiently prepared to respond to a large-scale cyberattack.	28%	23%

Around 60% of Canadian IT decision makers think it is very important for the federal government to modernize its technology and cloud infrastructure to protect the privacy of Canadians' personal data (64%) and for heightened cybersecurity (60%)
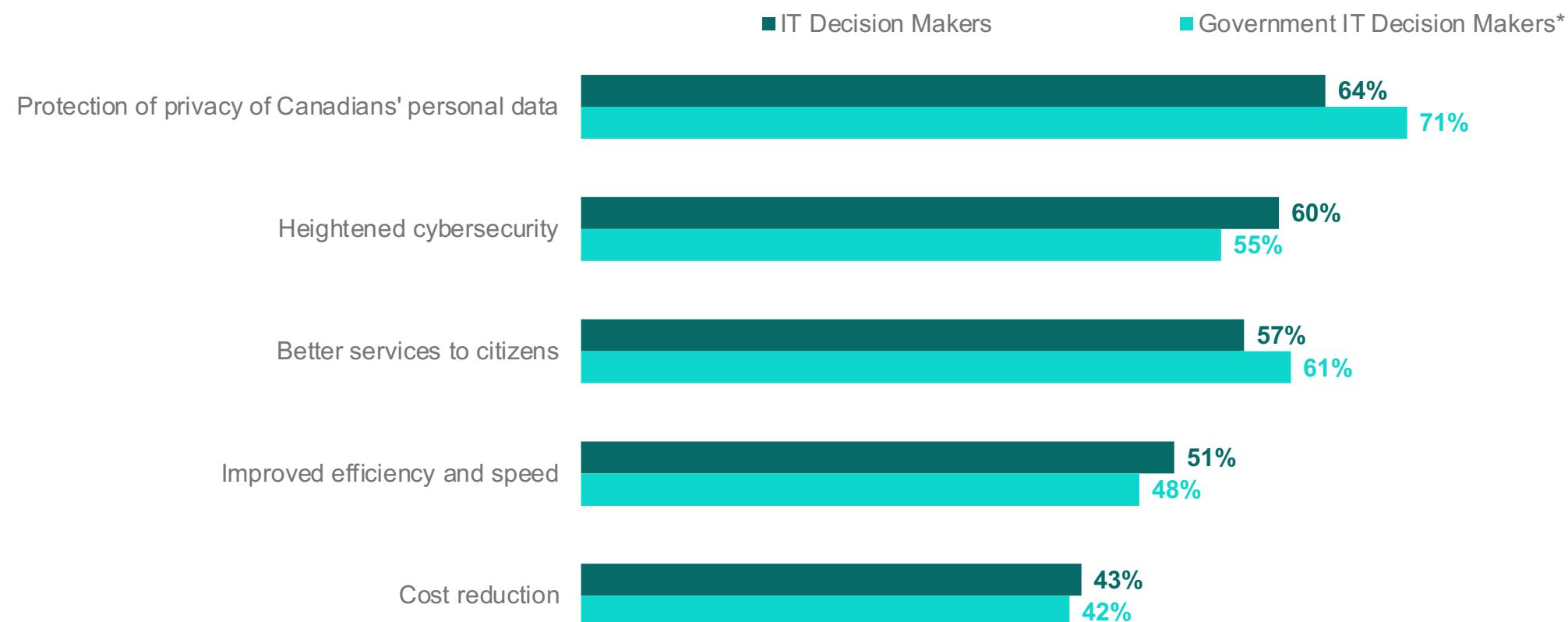
How important do you think it is for the federal government to modernize its technology and cloud infrastructure to achieve the following?

● Very important   ● Somewhat important   ● Don't know/Not sure   ● Not very important   ● Not at all important

Protection of privacy of Canadians' personal data
64% | 30%

Heightened cybersecurity
60% | 34% | 4%

Better services to citizens
57% | 37%

Improved efficiency and speed
51% | 43% | 4%

Cost reduction
43% | 45% | 8%

A majority of Canadian IT decision makers and government IT decision makers think it is very important for the federal government to modernize its technology and cloud infrastructure to achieve protection of privacy of Canadians' personal data, heightened cybersecurity, and better services to citizens
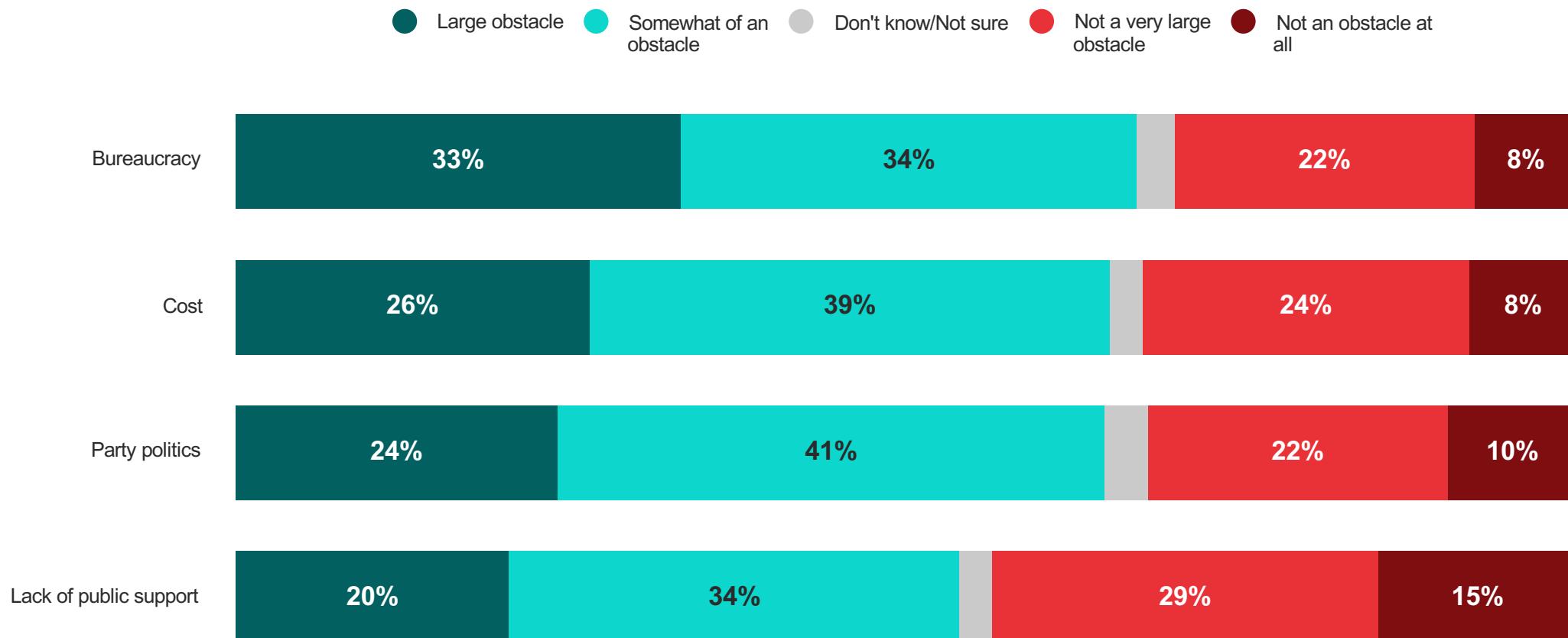
How important do you think it is for the federal government to modernize its technology and cloud infrastructure to achieve the following? **[Showing % Very important]**

■ IT Decision Makers   ■ Government IT Decision Makers*

	IT Decision Makers	Government IT Decision Makers*
Protection of privacy of Canadians' personal data	64%	71%
Heightened cybersecurity	60%	55%
Better services to citizens	57%	61%
Improved efficiency and speed	51%	48%
Cost reduction	43%	42%

*Government IT Decision Maker audience is less than 100 respondents; results compared to IT decision maker audience overall are not statistically significant

MORNING CONSULT®

About two thirds of Canadian IT decision makers think bureaucracy (67%), cost (65%), and party politics (65%) are obstacles to technology/cloud modernization
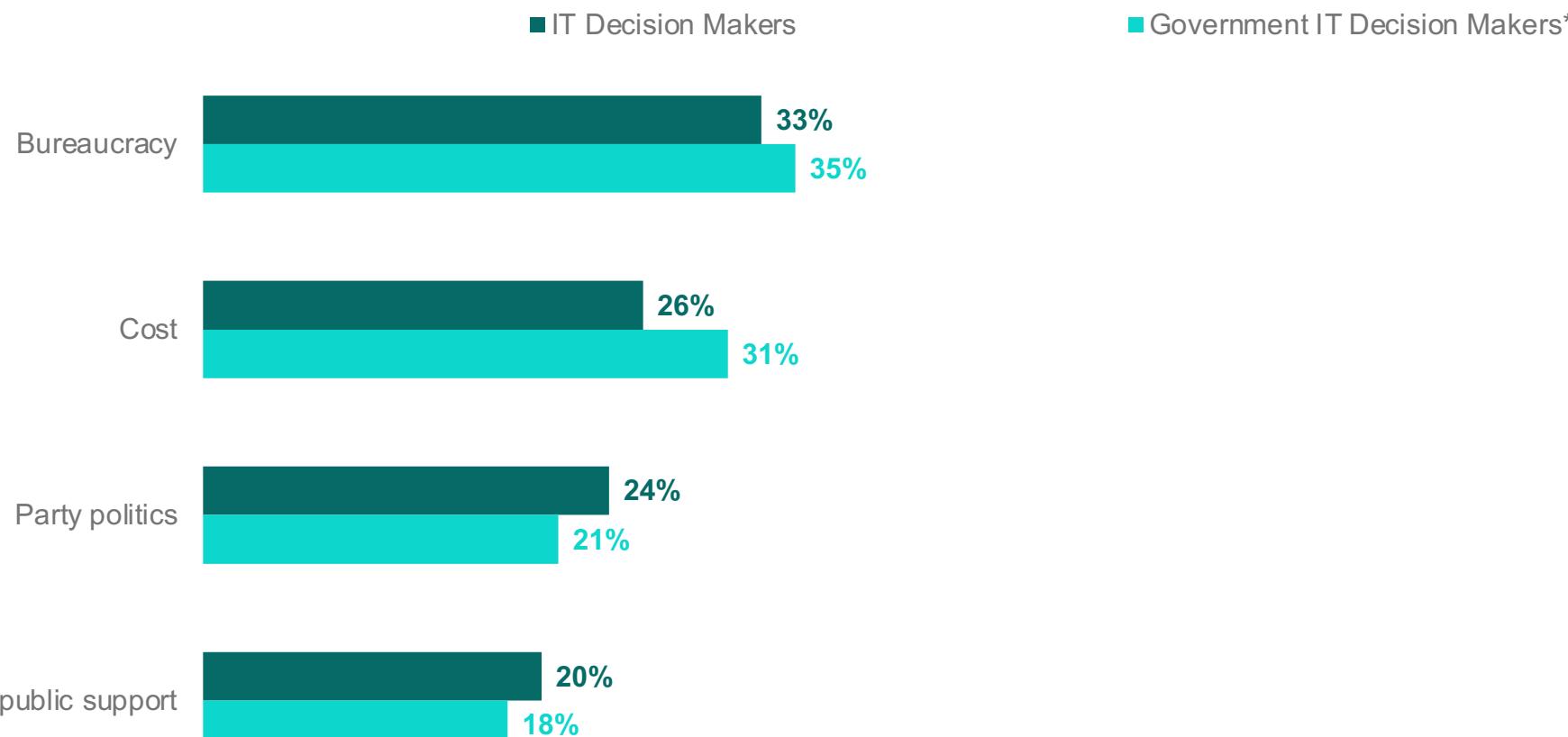
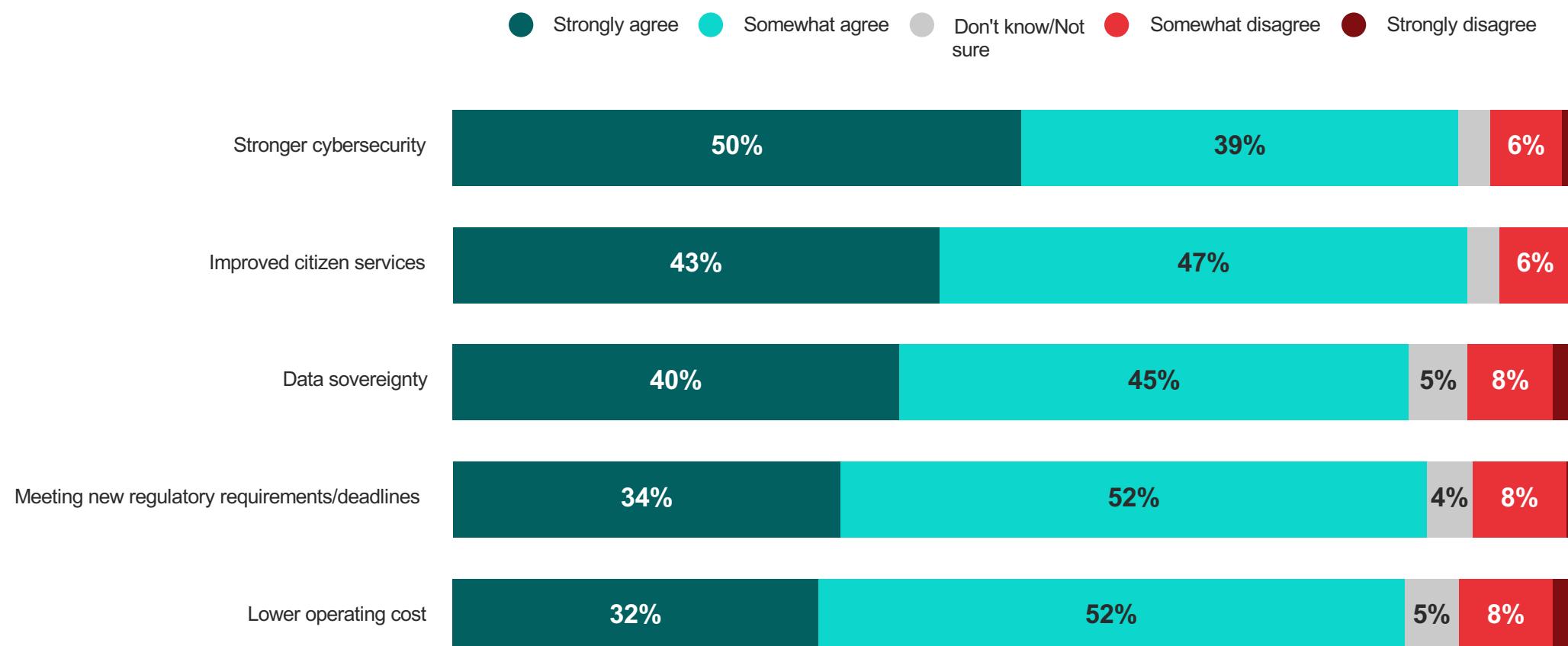How much of an obstacle to technology/cloud modernization do you think the following are?

● Large obstacle   ● Somewhat of an obstacle   ● Don't know/Not sure   ● Not a very large obstacle   ● Not an obstacle at all

	Large obstacle	Somewhat of an obstacle	Don't know/Not sure	Not a very large obstacle	Not an obstacle at all
Bureaucracy	33%	34%		22%	8%
Cost	26%	39%		24%	8%
Party politics	24%	41%		22%	10%
Lack of public support	20%	34%		29%	15%

Bureaucracy and cost are seen as the largest obstacles to technology/cloud modernization by both Canadian IT decision makers and government IT decision makers

How much of an obstacle to technology/cloud modernization do you think the following are? **[Showing % Large obstacle]**
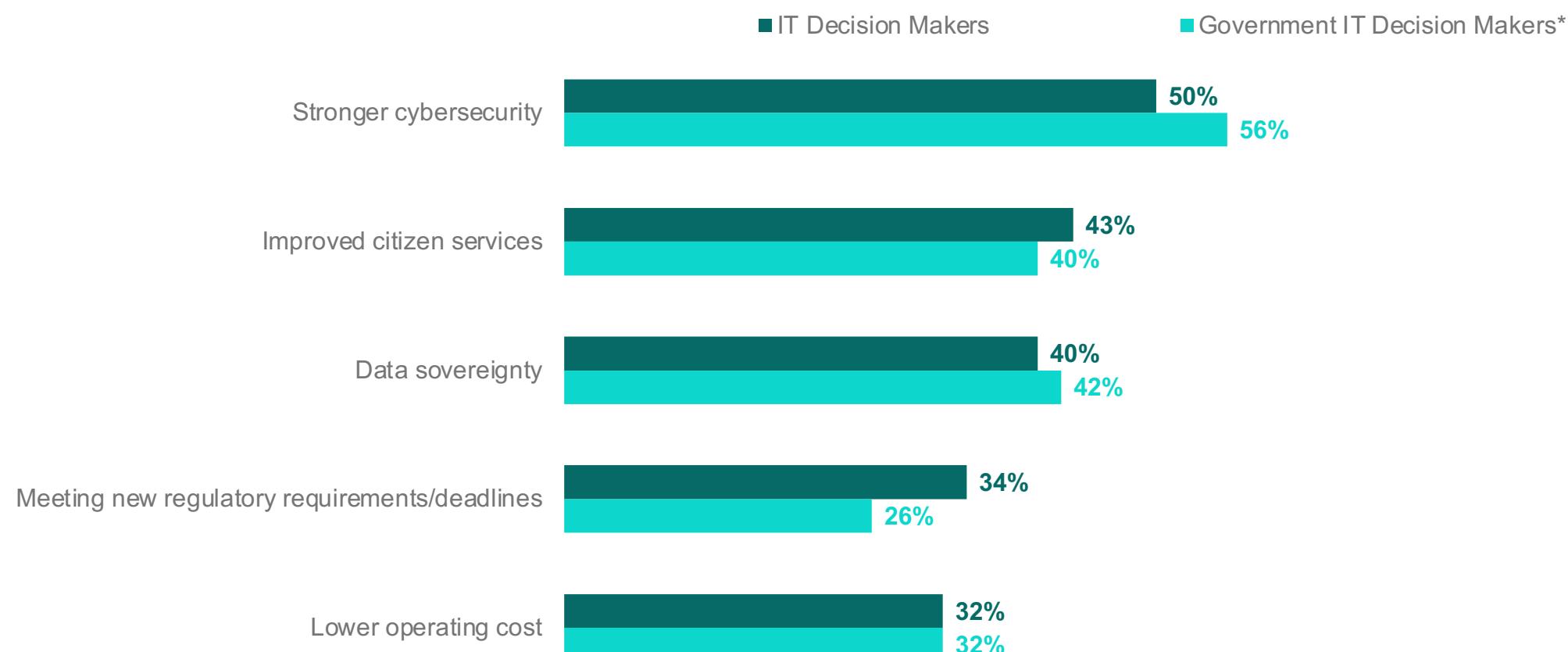
■ IT Decision Makers   ■ Government IT Decision Makers*

	IT Decision Makers	Government IT Decision Makers*
Bureaucracy	33%	35%
Cost	26%	31%
Party politics	24%	21%
Lack of public support	20%	18%

*Government IT Decision Maker audience is less than 100 respondents; results compared to IT decision maker audience overall are not statistically significant

50% of Canadian IT decision makers strongly agree cloud computing better helps modernize federal IT systems in terms of stronger cybersecurity

To what extent do you agree that cloud computing better helps modernize federal IT systems in the following ways?

● Strongly agree　　● Somewhat agree　　● Don't know/Not sure　　● Somewhat disagree　　● Strongly disagree

	Strongly agree	Somewhat agree	Don't know/Not sure	Somewhat disagree
Stronger cybersecurity	50%	39%		6%
Improved citizen services	43%	47%		6%
Data sovereignty	40%	45%	5%	8%
Meeting new regulatory requirements/deadlines	34%	52%	4%	8%
Lower operating cost	32%	52%	5%	8%

Over half of Canadian IT decision makers and government IT decision makers strongly agree that cloud computing helps modernize federal IT systems in terms of stronger cybersecurity

To what extent do you agree that cloud computing better helps modernize federal IT systems in the following ways? **[Showing % Strongly agree]**

■ IT Decision Makers ■ Government IT Decision Makers*

	IT Decision Makers	Government IT Decision Makers*
Stronger cybersecurity	50%	56%
Improved citizen services	43%	40%
Data sovereignty	40%	42%
Meeting new regulatory requirements/deadlines	34%	26%
Lower operating cost	32%	32%

*Government IT Decision Maker audience is less than 100 respondents; results compared to IT decision maker audience overall are not statistically significant

11

MODERNIZATION OF FEDERAL GOVERNMENT TECH

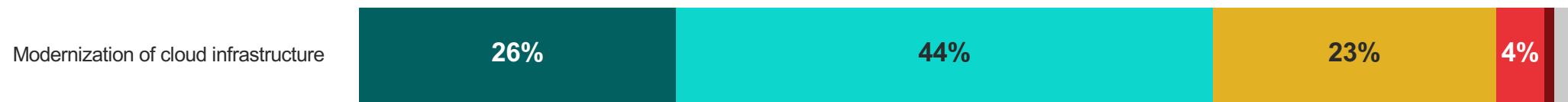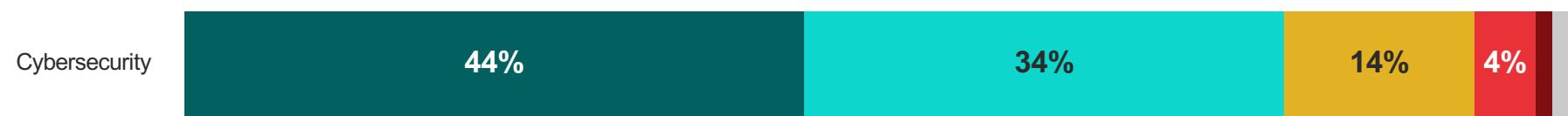IMPACT OF TECH ON COST & DELIVERY OF SERVICES

CONCERNS AROUND CYBERCRIME

MORNING CONSULT®

44% of Canadian IT decision makers think cybersecurity is critical in reducing government costs and improving delivery of services

How important do you think the following technologies are in reducing government costs and improving delivery of services?
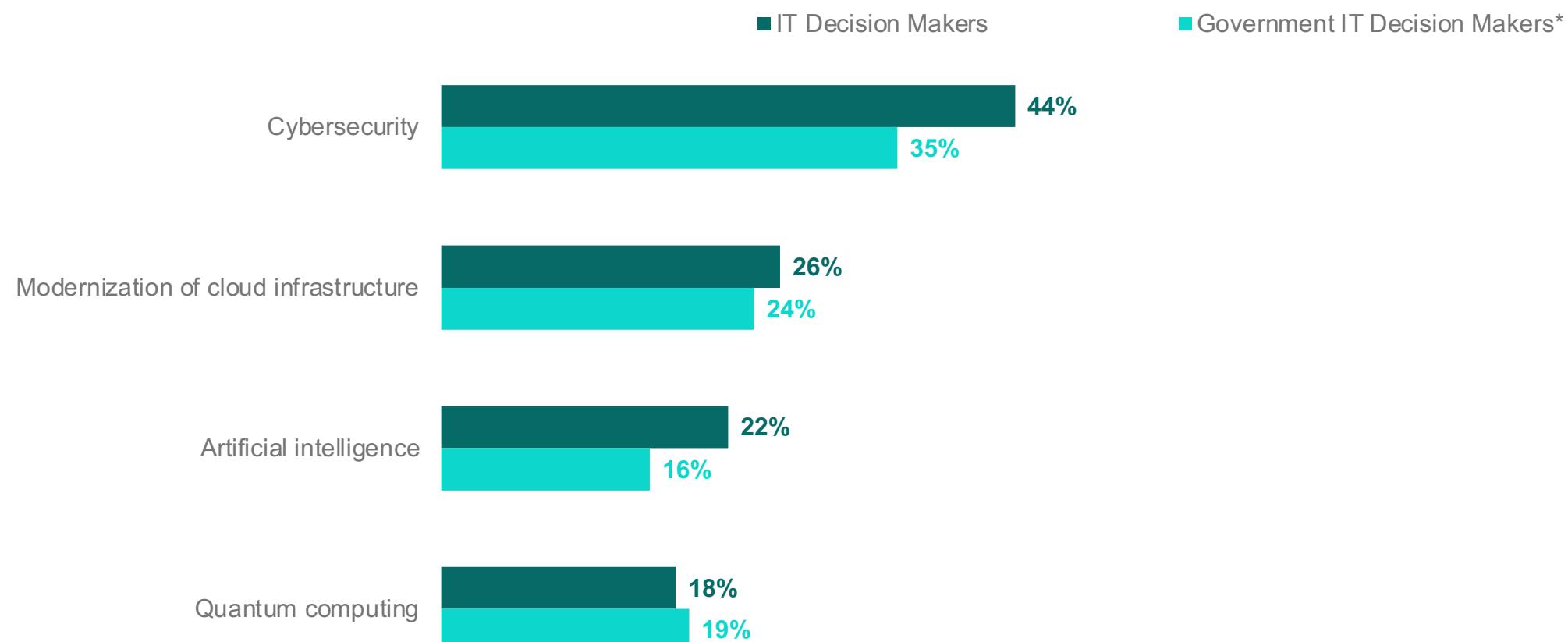
● Critical ● Very important ● Somewhat important ● Not very important ● Not at all important ● Don't know/Not sure

Technology	Critical	Very important	Somewhat important	Not very important
Cybersecurity	44%	34%	14%	4%
Modernization of cloud infrastructure	26%	44%	23%	4%
Artificial intelligence	22%	42%	24%	7%
Quantum computing	18%	36%	31%	6% (Not very), 7% (Don't know)

MORNING CONSULT®
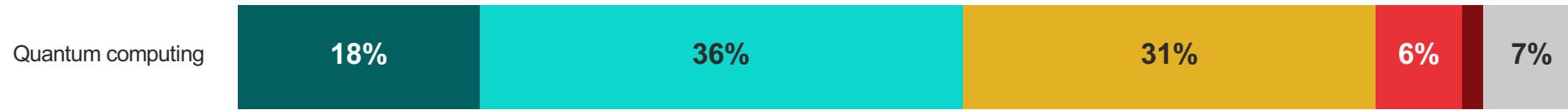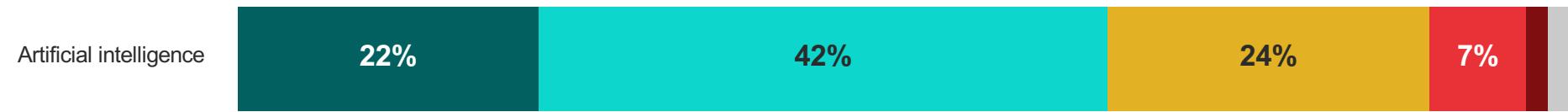
Canadian IT decision makers (44%) and government IT decision makers (35%) see cybersecurity as most critical in reducing government costs and improving delivery of services

How important do you think the following technologies are in reducing government costs and improving delivery of services? **[Showing % Critical]**

■ IT Decision Makers   ■ Government IT Decision Makers*

Technology	IT Decision Makers	Government IT Decision Makers*
Cybersecurity	44%	35%
Modernization of cloud infrastructure	26%	24%
Artificial intelligence	22%	16%
Quantum computing	18%	19%

14

*Government IT Decision Maker audience is less than 100 respondents; results compared to IT decision maker audience overall are not statistically significant

MODERNIZATION OF FEDERAL GOVERNMENT TECH

TECH IMPACT ON COST & DELIVERY OF SERVICES
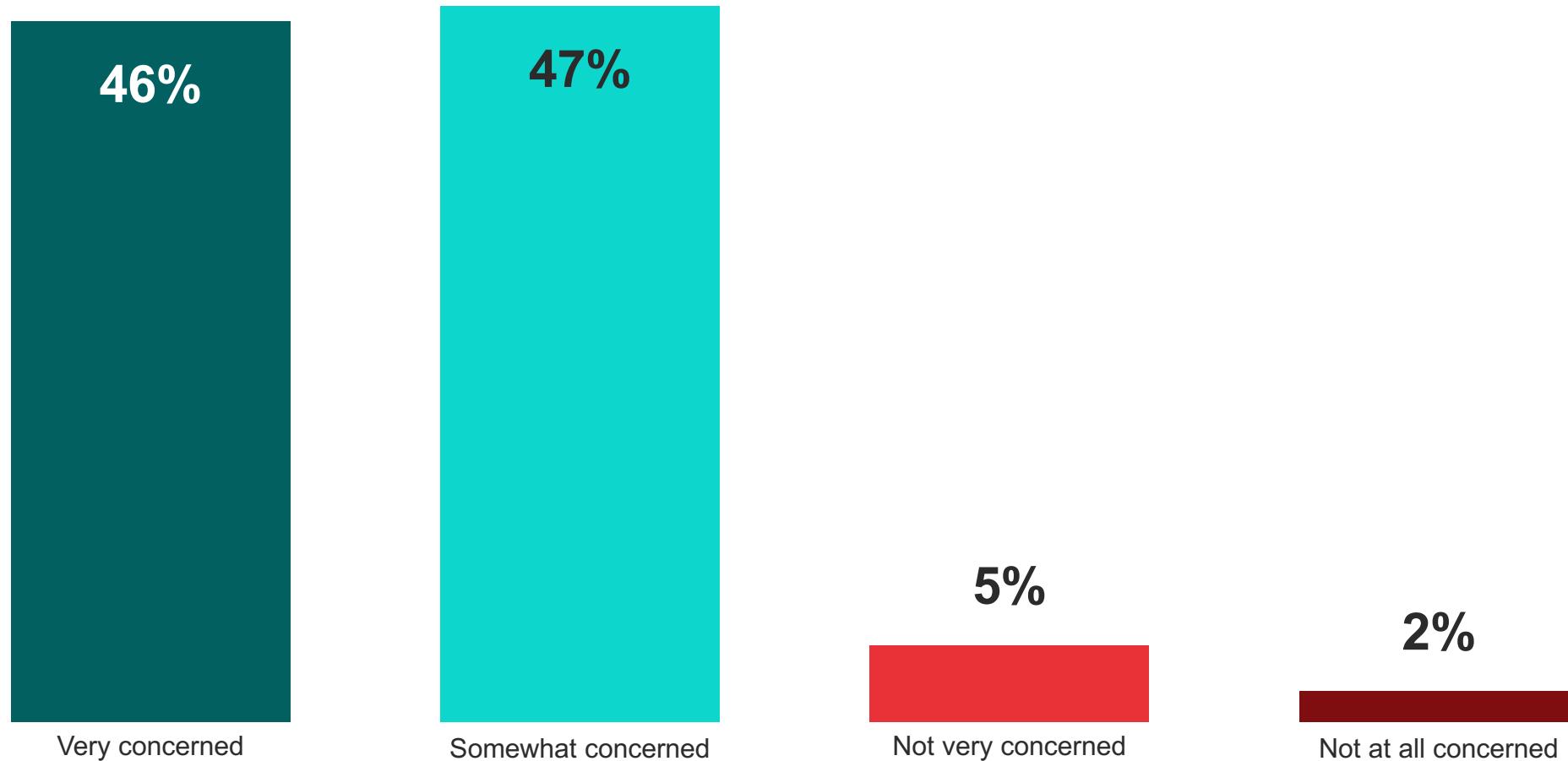
CONCERNS AROUND CYBERCRIME

Over nine in ten (93%) of Canadian IT decision makers are concerned, with 46% saying they are very concerned, about security risks and the potential impact of cybercrime in Canada

How concerned are you about security risks and the potential impact of cybercrime in Canada?

| 46% | 47% | 5% | 2% |
| Very concerned | Somewhat concerned | Not very concerned | Not at all concerned |

A majority of Canadian IT decision makers and government IT decision makers are very or somewhat concerned about security risks and the potential impact of cybercrime in Canada

How concerned are you about security risks and the potential impact of cybercrime in Canada?

● Very concerned   ● Somewhat concerned   ● Not very concerned   ● Not at all concerned

IT Decision Maker

| 46% | 47% | 5% |

Government IT Decision Maker*

| 37% | 58% |

*Government IT Decision Maker audience is less than 100 respondents; results compared to IT decision maker audience overall are not statistically significant