



accenture[>]consulting

WHAT PEOPLE WANT

ACCENTURE PUBLIC SERVICE
GLOBAL CITIZEN SURVEY

WAVE 3

JULY 2017

WHAT DO PEOPLE WANT FROM DIGITAL GOVERNMENT?

**We asked thousands of citizens
across six countries: Australia,
France, Germany, Singapore,
UK and USA.**



THREE PART AGENDA

We suggest a three part agenda for decision makers in governments, public service agencies and digital government program offices:

01

CREATE DELIGHTFUL EXPERIENCES

Easy, comprehensive, personalised and safe. Look for the best digital experiences from any sector. This is what your citizens expect.

02

FOCUS ON CYBER SECURITY AND TECHNOLOGY TO SUPPORT PUBLIC SAFETY

**These are incredibly important to your citizens
in what they perceive to be very uncertain times.**

03

DEVELOP STRATEGIES TO LEVERAGE DIGITAL PLATFORMS TO INVOLVE CITIZENS

There is an overwhelming expectation for more say by people.

ABOUT THE STUDY

The purpose of this study is to assess citizen opinions about a variety of digital government service issues and topics.

Study results are based on a sample of more than 5,400 citizens aged 18 or older who completed an online survey in January-February 2017, with the sample by country as follows:

UNITED STATES
1,014

AUSTRALIA
1,014

FRANCE
1,005

UNITED KINGDOM
1,019

SINGAPORE
997

GERMANY
1,004

Results for the full global sample in this report are statistically significant with a confidence level of 95% and a margin of error of +/-1.3%.

Results for each country are statistically significant with a confidence level of 95% and a margin of error of +/-3.1% except for Singapore where the margin of error is +/-3.2%.

KEY FINDINGS



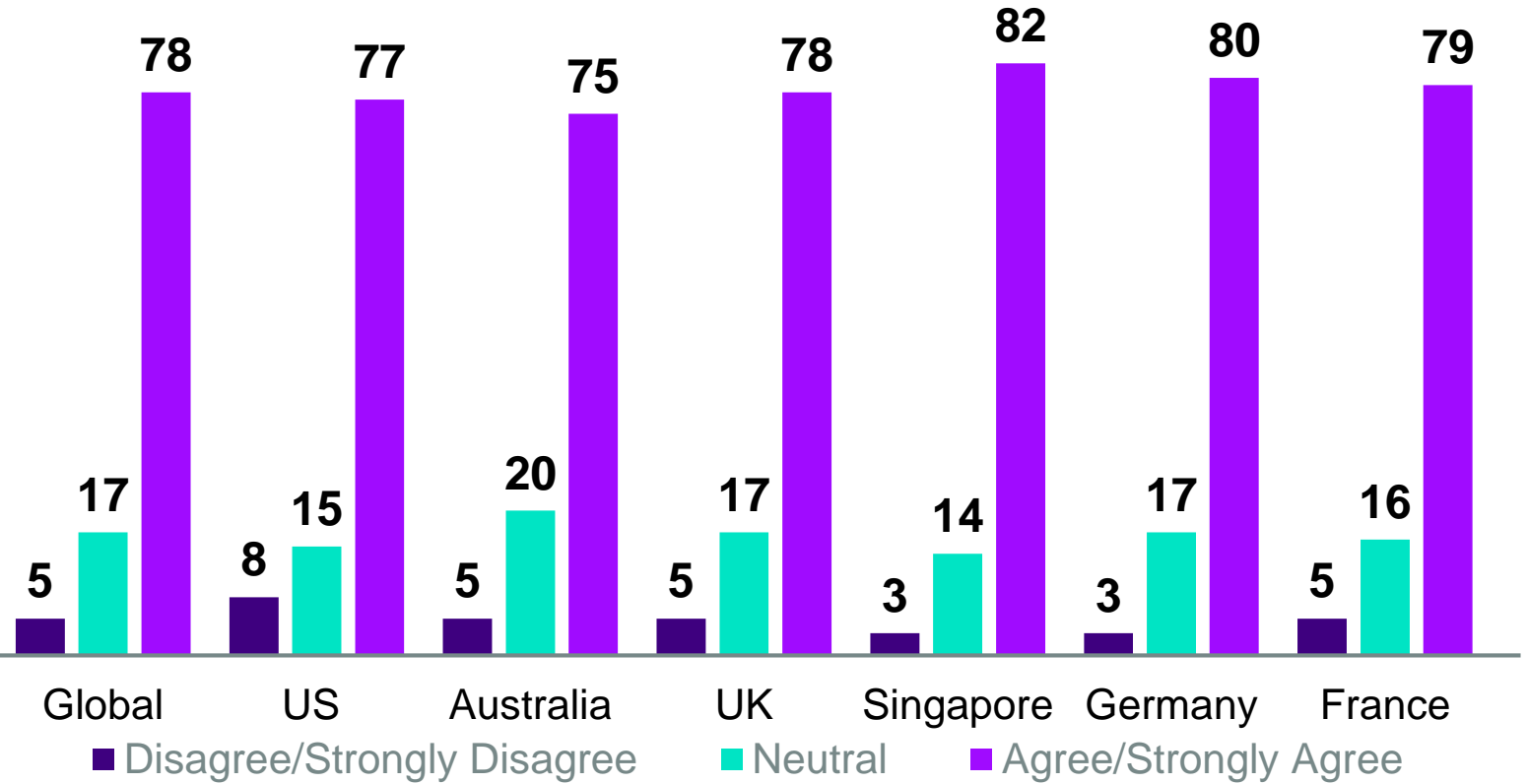
ALL VALUES EXPRESSED
AS A **PERCENTAGE**

**DATA SECURITY AND
PRIVACY MUST BE A
GOVERNMENT
PRIORITY.**

SECURITY

78% want government to do more to keep personal data more private and secure.

Government agencies must do more to keep the personal data I share with them private and secure.

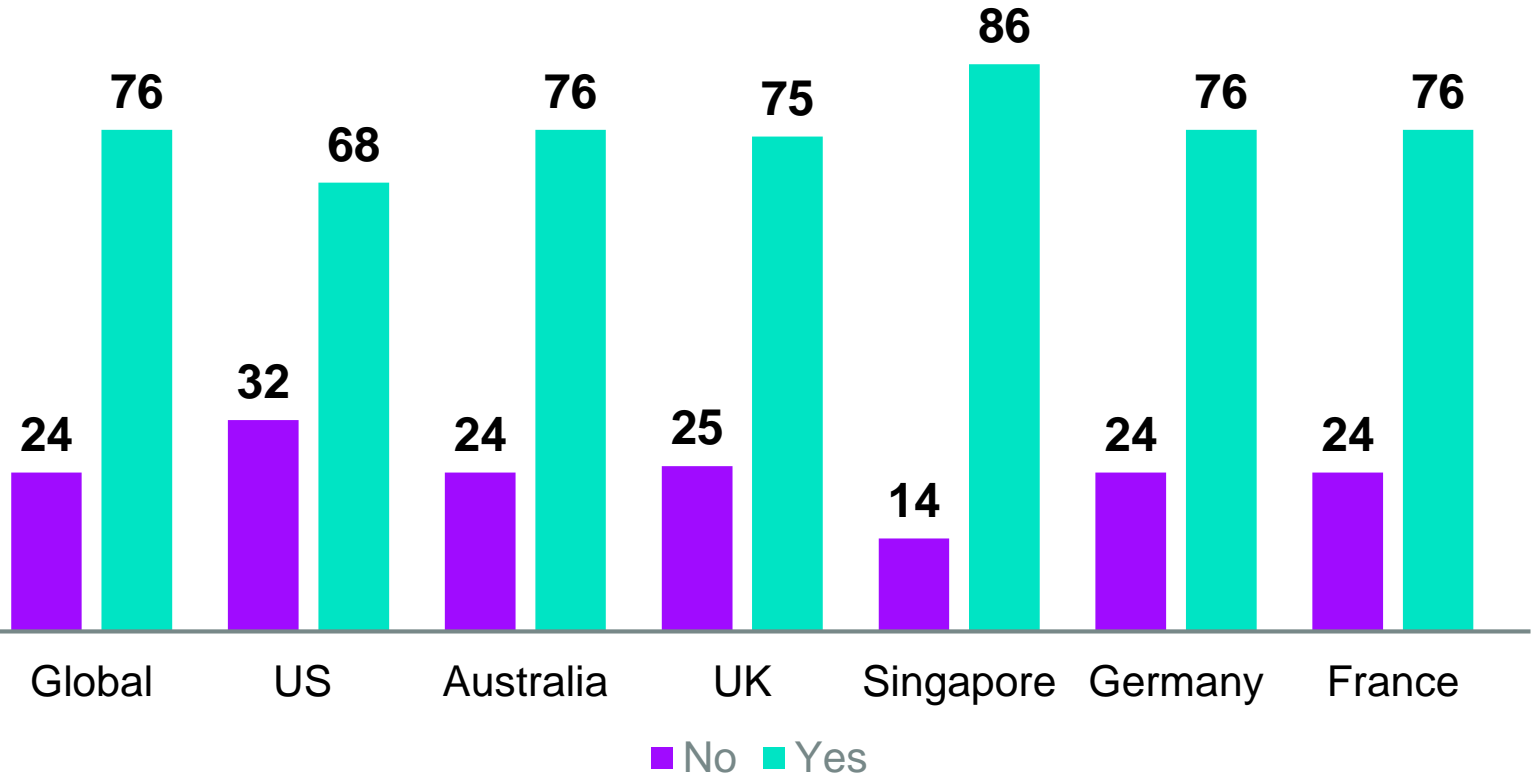


Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree

POSTAL SERVICES

76% want their national postal operator to get involved in protecting against identity theft and making online purchases more secure.

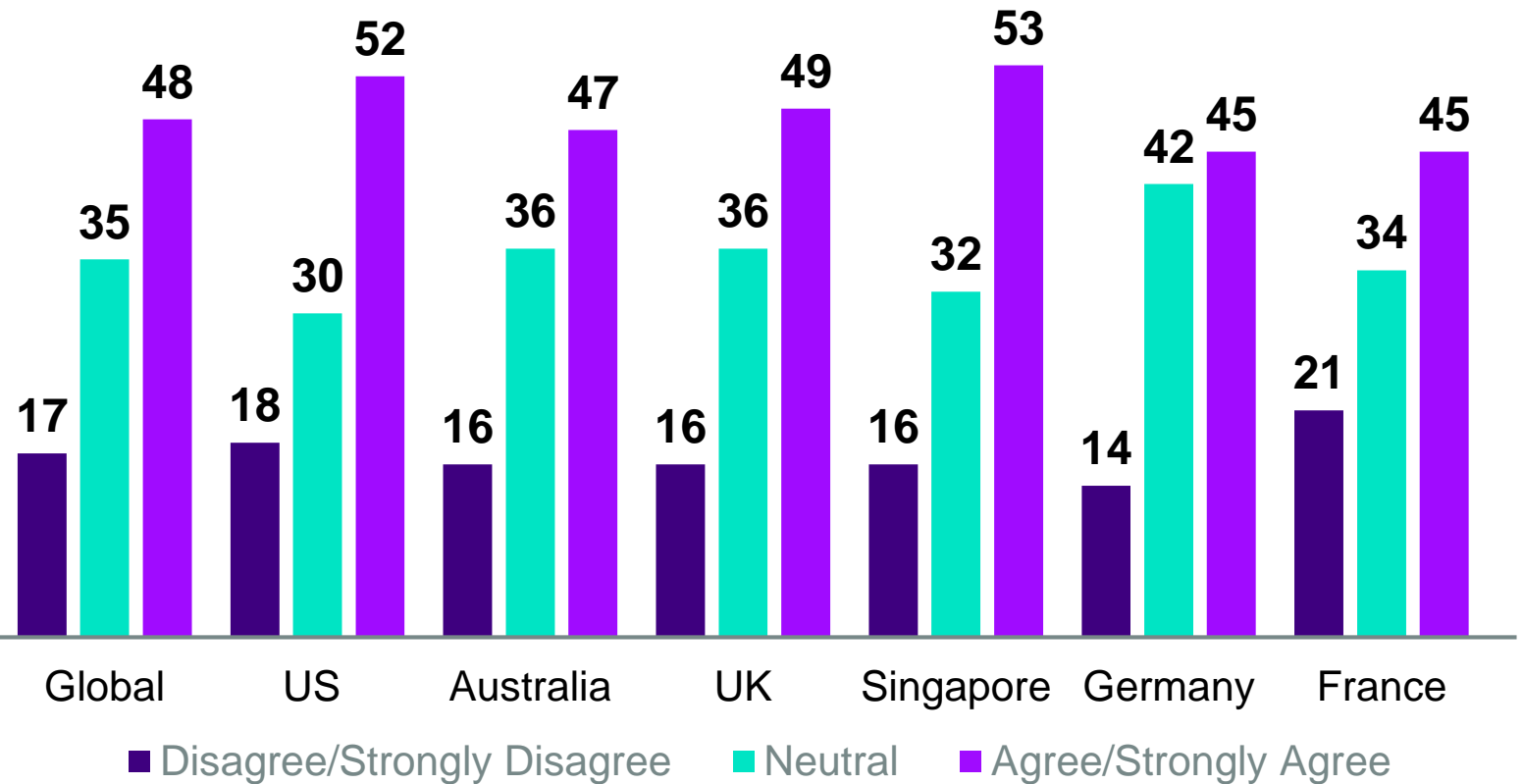
Do you think your national postal operator should get involved in protecting you from identity theft and making all your online purchases more secure?



EDUCATION

About half (45%-53%) think it is acceptable for higher education institutions to use personal data gathered from students if it supports student success and an improved student experience.

It is acceptable for higher education institutions to use personal data gathered from students if it supports student success and an improved student experience.

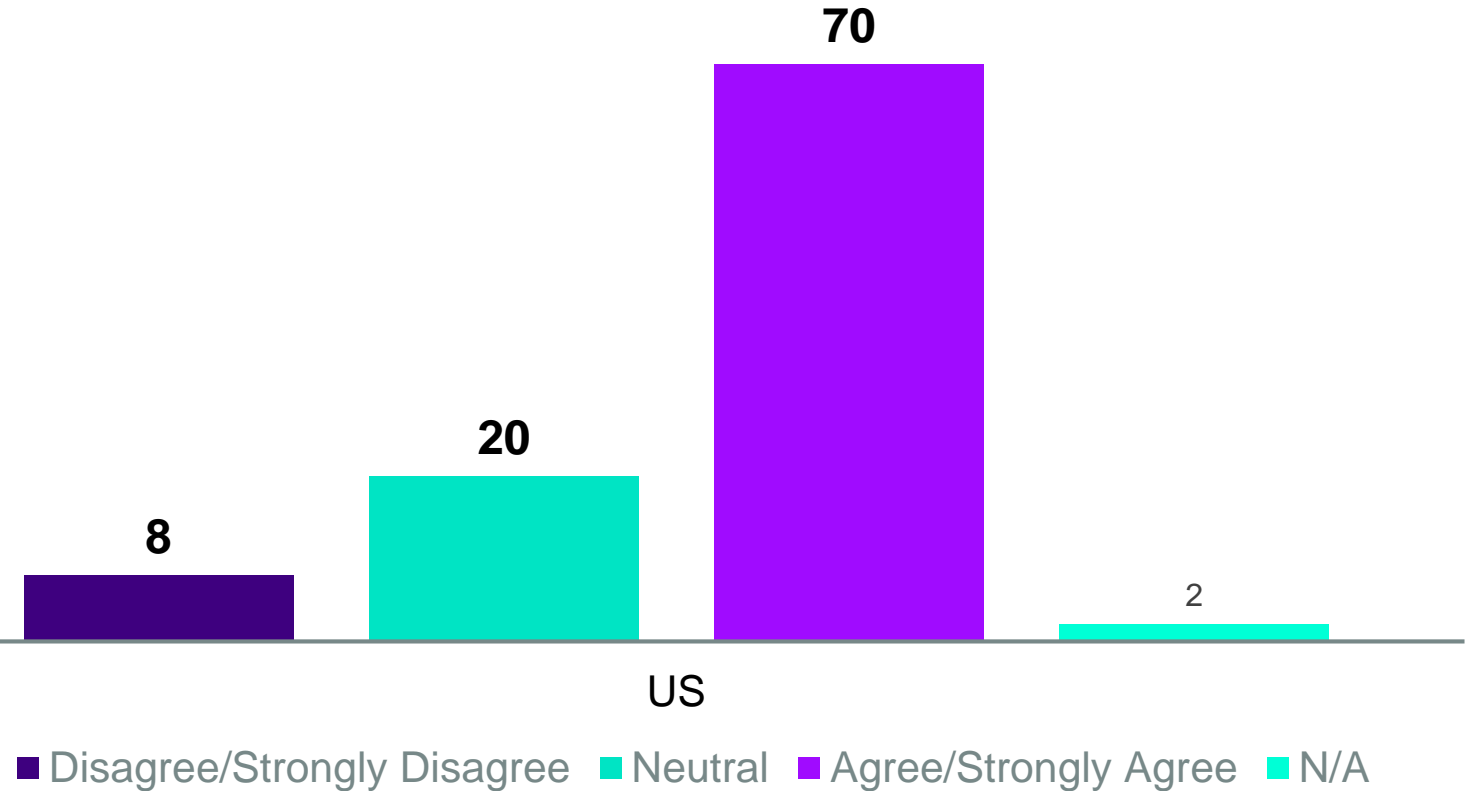


Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree

HEALTH AND HUMAN SERVICES

7 in 10 US citizens think their data may be more vulnerable to identity theft or hackers when health and human services agencies share it across agencies, and 6 in 10 think those agencies may misuse their data when sharing it.

I am concerned that my data may be more vulnerable to identity theft or hackers when health and human services agencies share it across agencies.

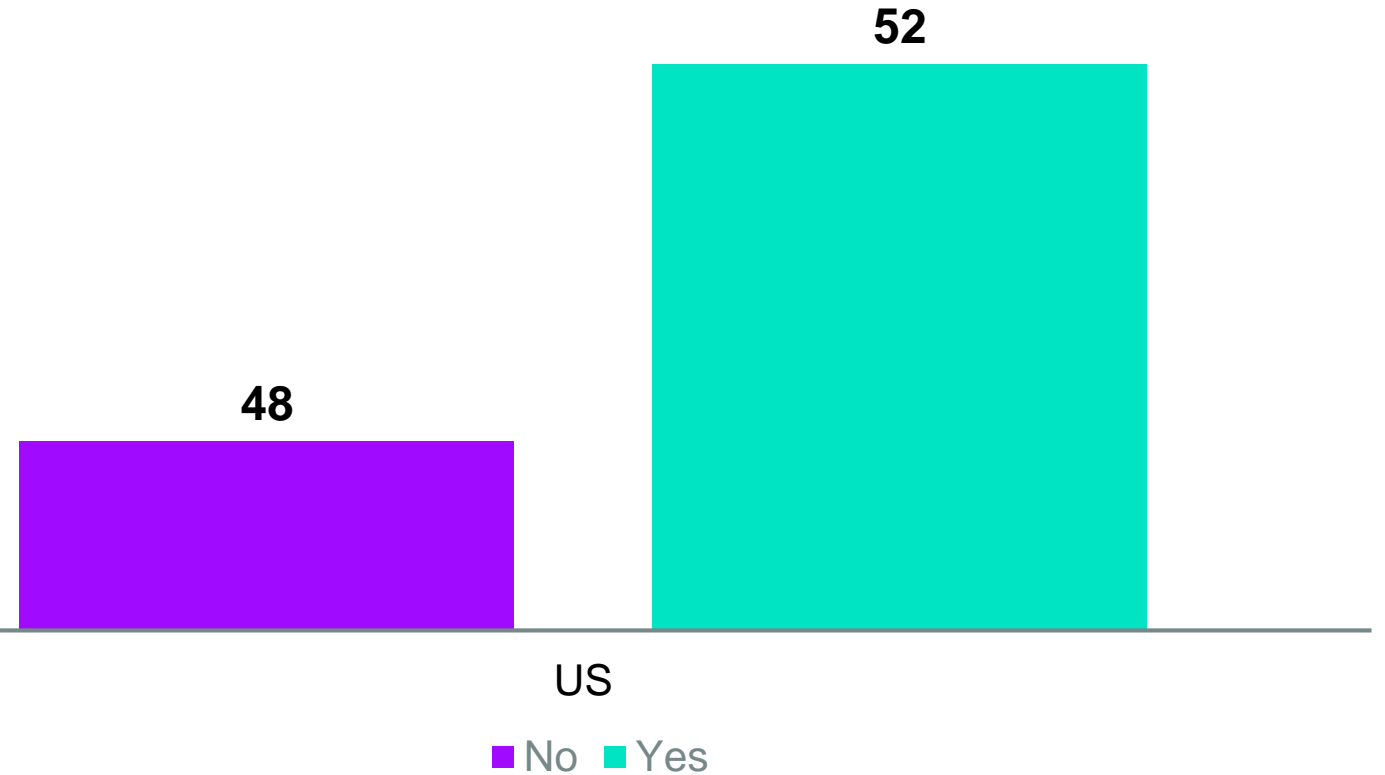


Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree

PENSIONS

Just over half of US citizens (52%) feel that their financial and health data used by Social Security or their public retirement agency are secure.

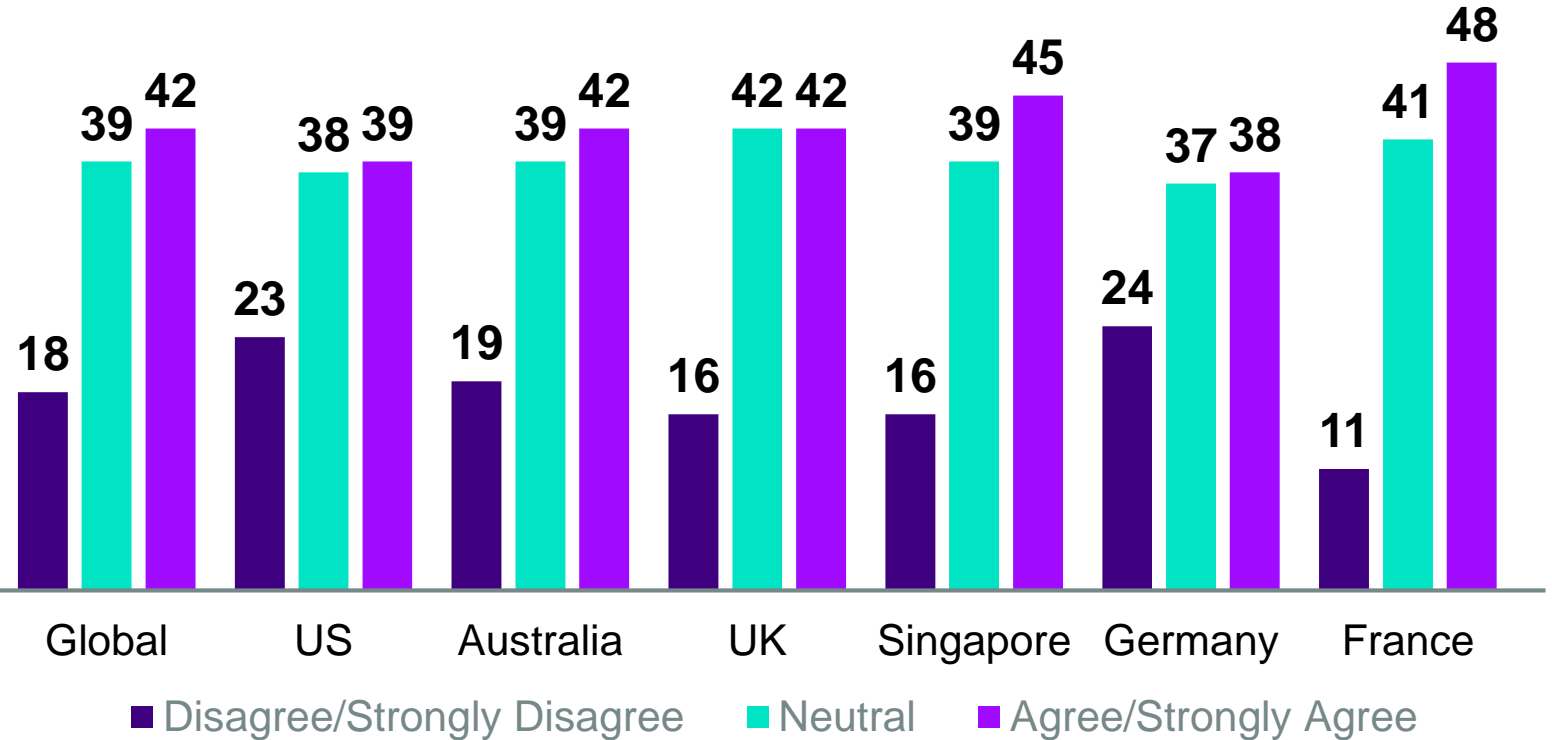
Do you feel that your financial and health data used by Social Security or your public retirement agency are secure?



BORDERS

Among all citizens surveyed, about 4 in 10 support border agencies sharing their information with other government agencies, even if the data can be properly encrypted for security.

I would be supportive of border agencies sharing my information with other government agencies in my country or other countries if the data can be properly encrypted for security.



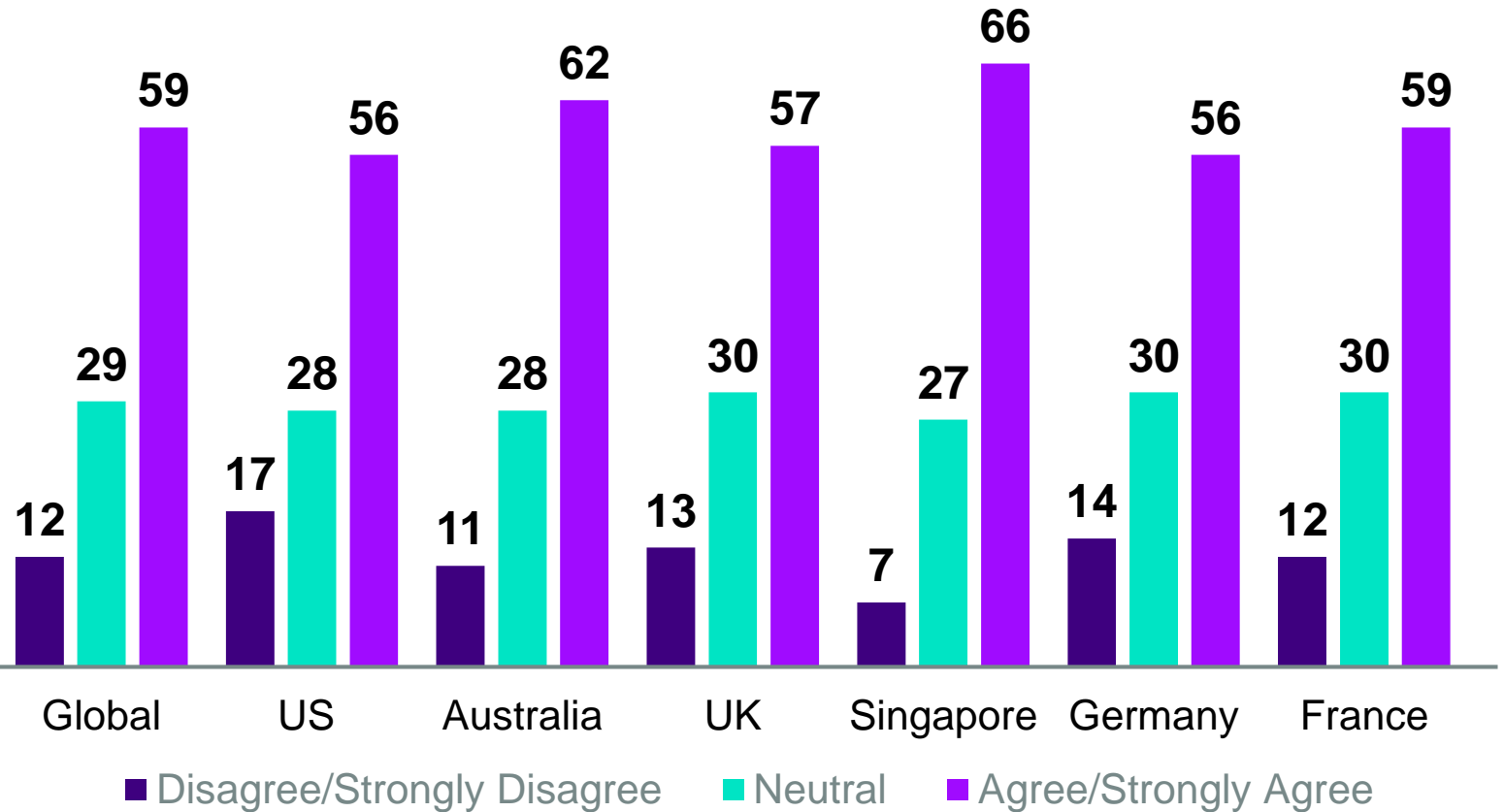
Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree

TRUST IN LOCAL POLICE IS STRONG, BUT TRUST IN GOVERNMENT BUDGETING IS WEAK.

PUBLIC SAFETY

Among all citizens surveyed, about 6 in 10 (59%) trust their local police force.

I trust my local police force.

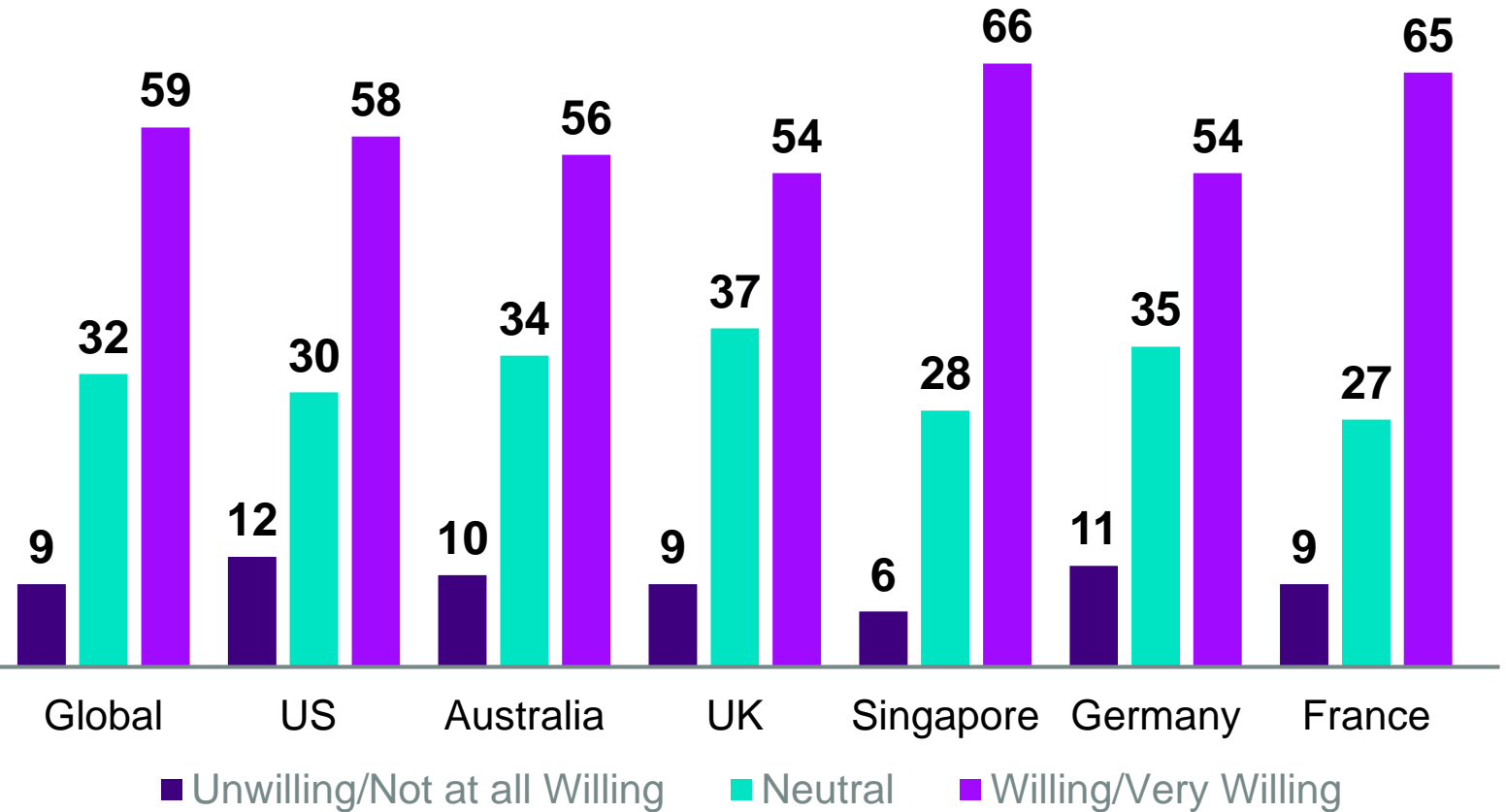


Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree

PUBLIC ADMIN/REGULATORY

For strong majorities of citizens (54%-66%), easier access to government budgeting and spending would increase their trust in government.

Easier access to public information on government budgeting and spending would increase my trust in government.

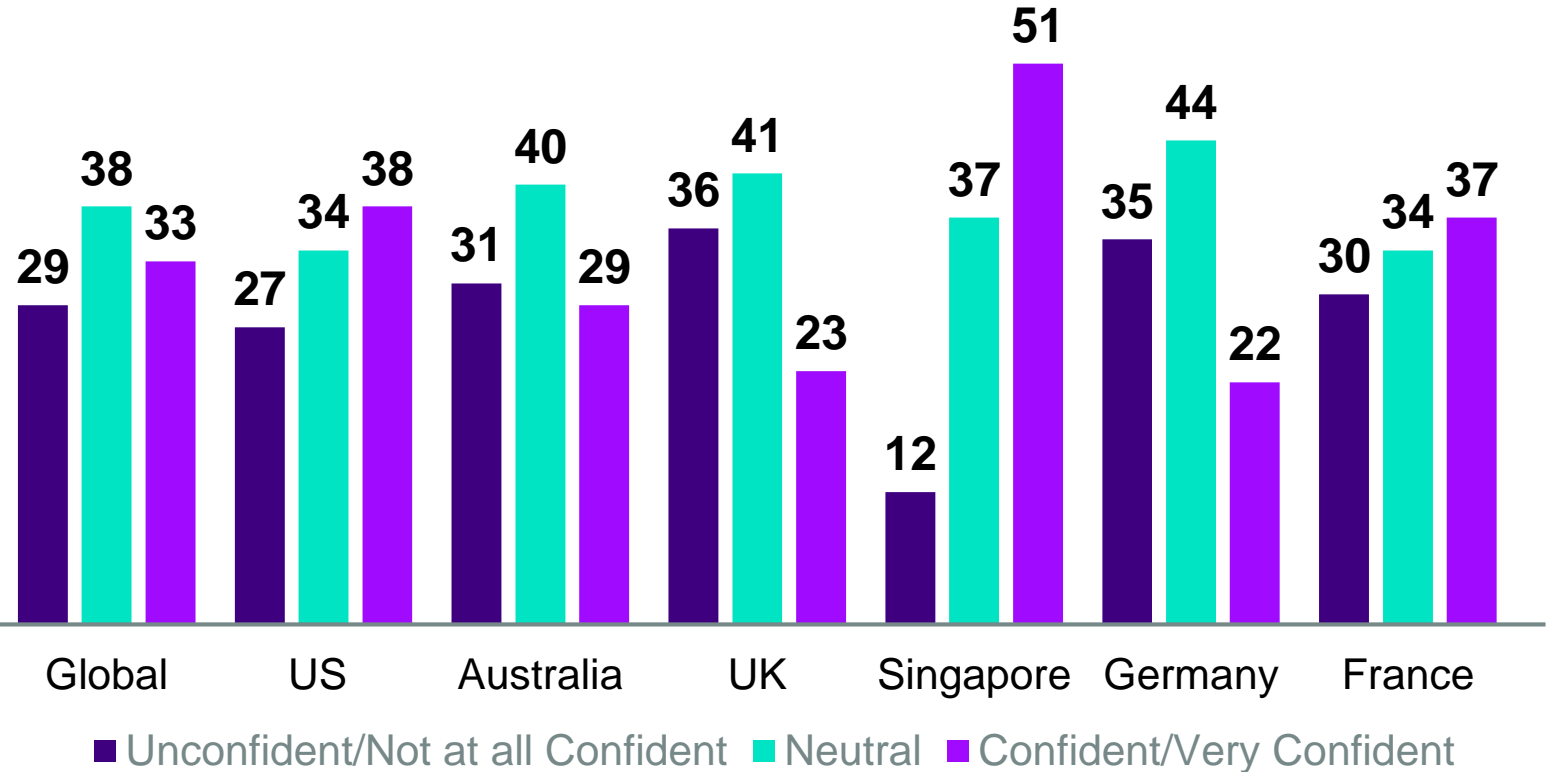


Percentages are based on a 5-point scale where 1=Not at all Willing, 2=Unwilling, 3=Neutral, 4=Willing, and 5=Very Willing

CONSULTING

Only 1 in 3 trust that local government is budgeting to address top local priorities.

How confident are you that your local government is properly budgeting to address the city's most important priorities?



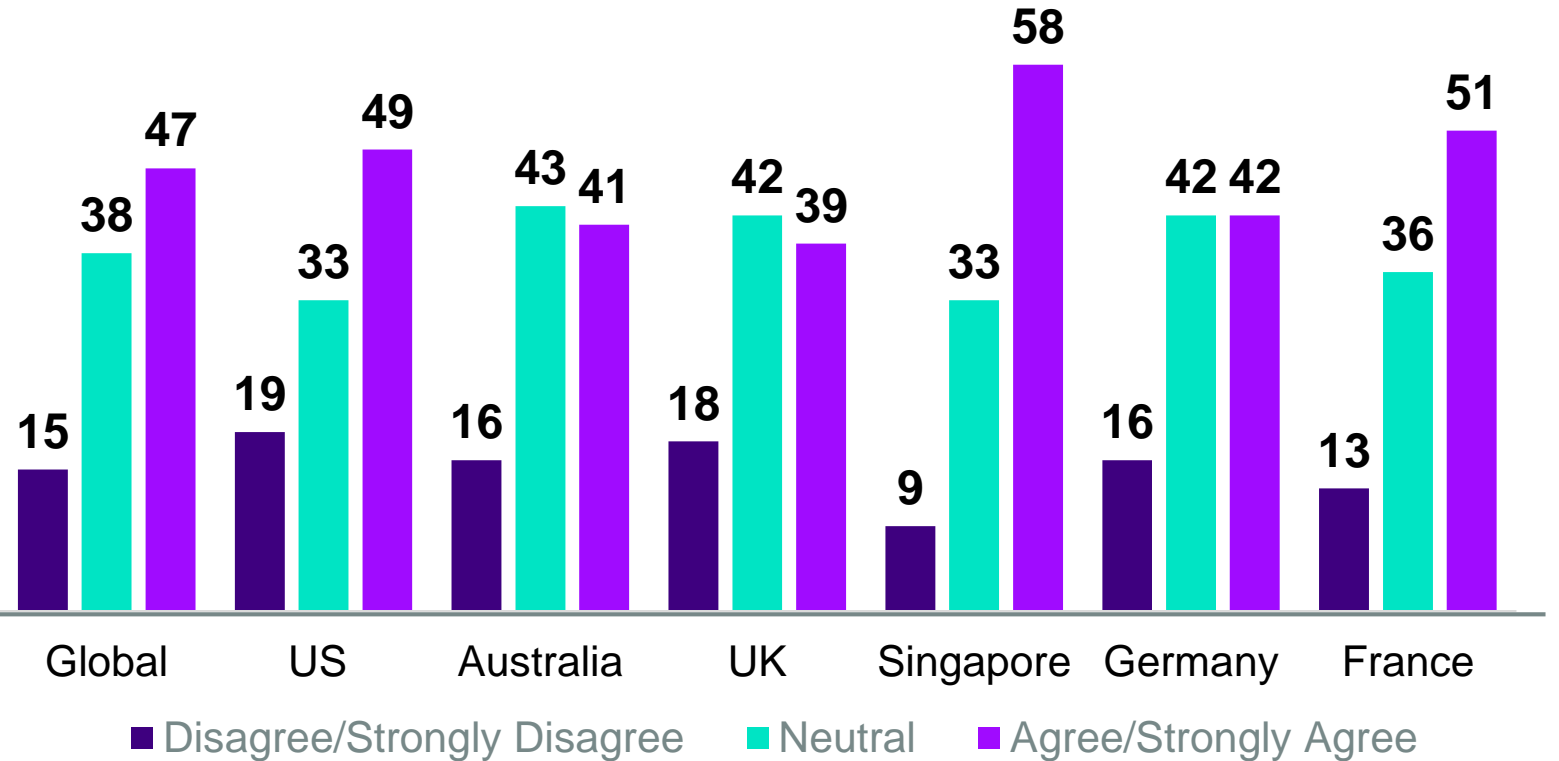
Percentages are based on a 5-point scale where 1=Not at all Confident, 2=Unconfident, 3=Neutral, 4=Confident, and 5=Very Confident.

**GOVERNMENT TECHNOLOGY
INNOVATION CAN INCREASE
CITIZEN ENGAGEMENT.**

PUBLIC ADMIN/REGULATORY

More innovative use of emerging technologies would make about half of all citizens surveyed (47%) more interested in working for government.

My interest in working for government agencies would increase if they were more innovative in using emerging technologies like artificial intelligence, biometrics, and advanced analytics.

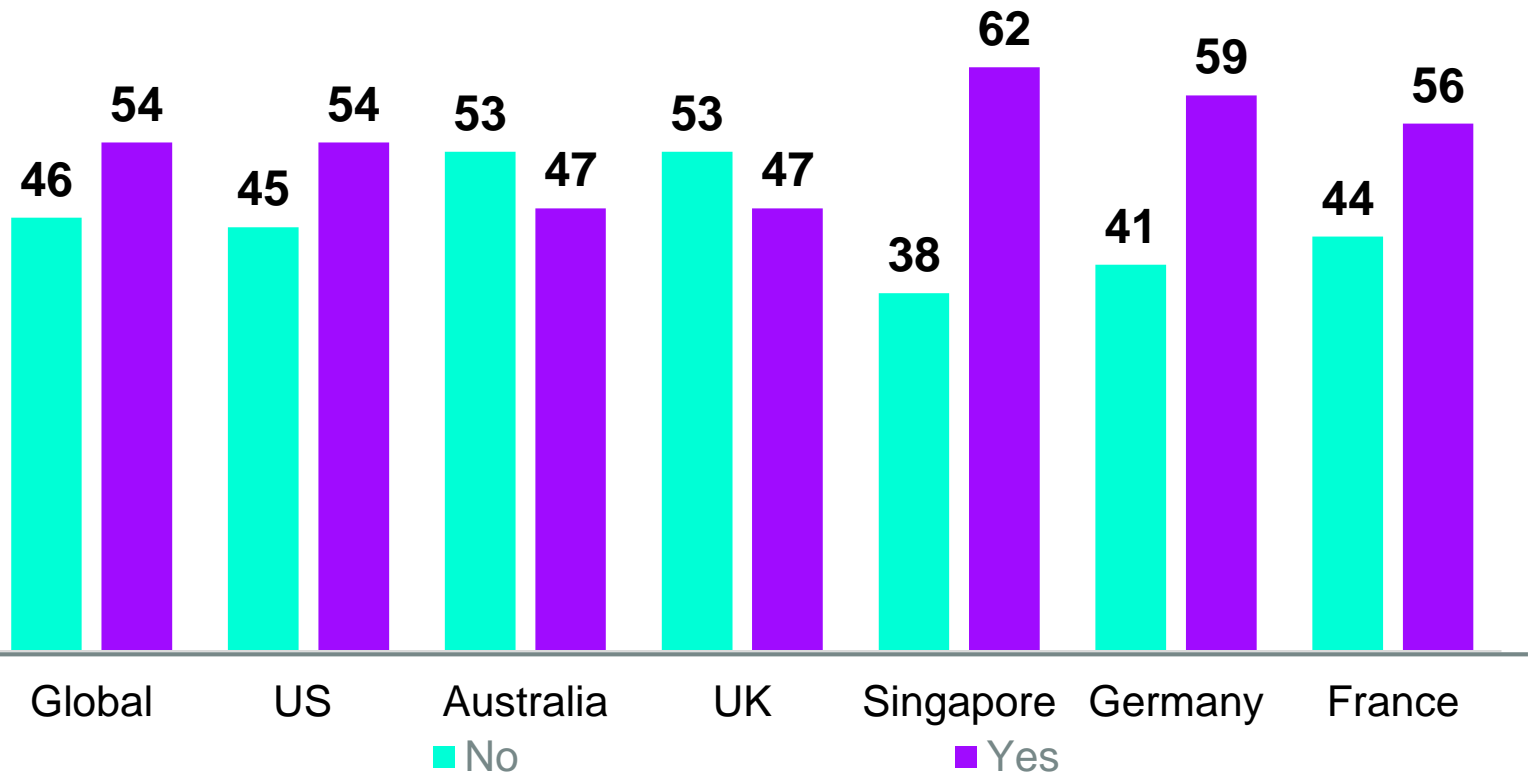


Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree

REVENUE

A majority (54%) would join or participate in online webinars proposed by their tax authority.

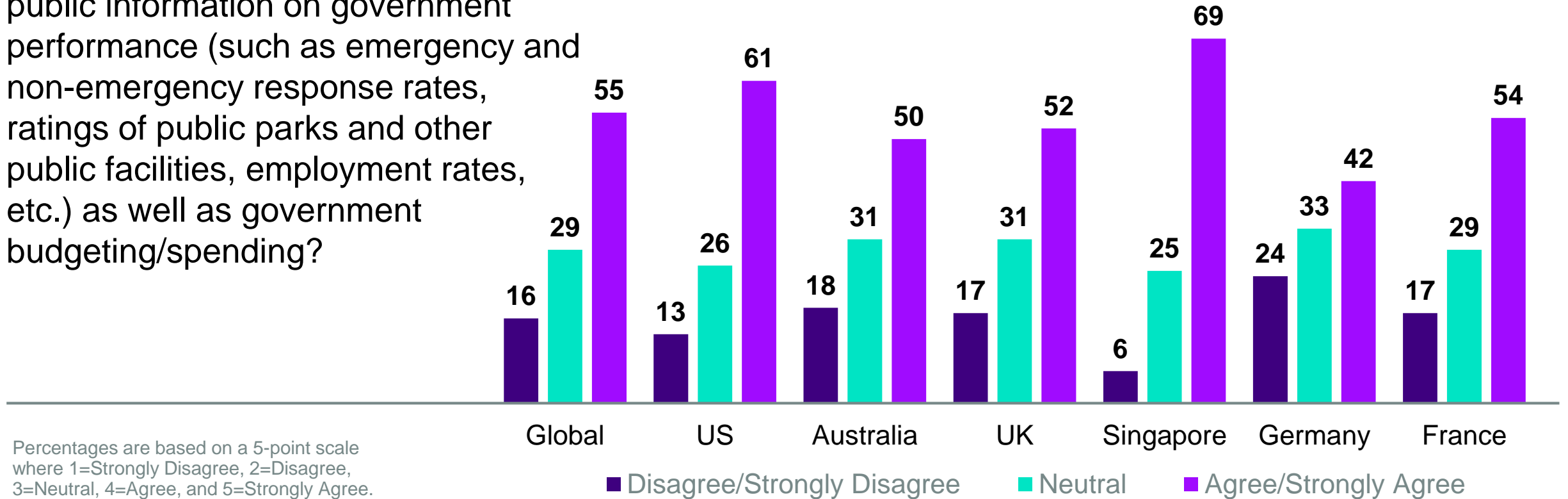
Would you join or participate in online webinars proposed by your tax authority to explain and help you complete your tax forms?



PUBLIC ADMIN/REGULATORY

A majority (55%) are likely to use an app that makes it easier to access public information on government performance.

How likely would you be to use an app that made it easier for you to access public information on government performance (such as emergency and non-emergency response rates, ratings of public parks and other public facilities, employment rates, etc.) as well as government budgeting/spending?

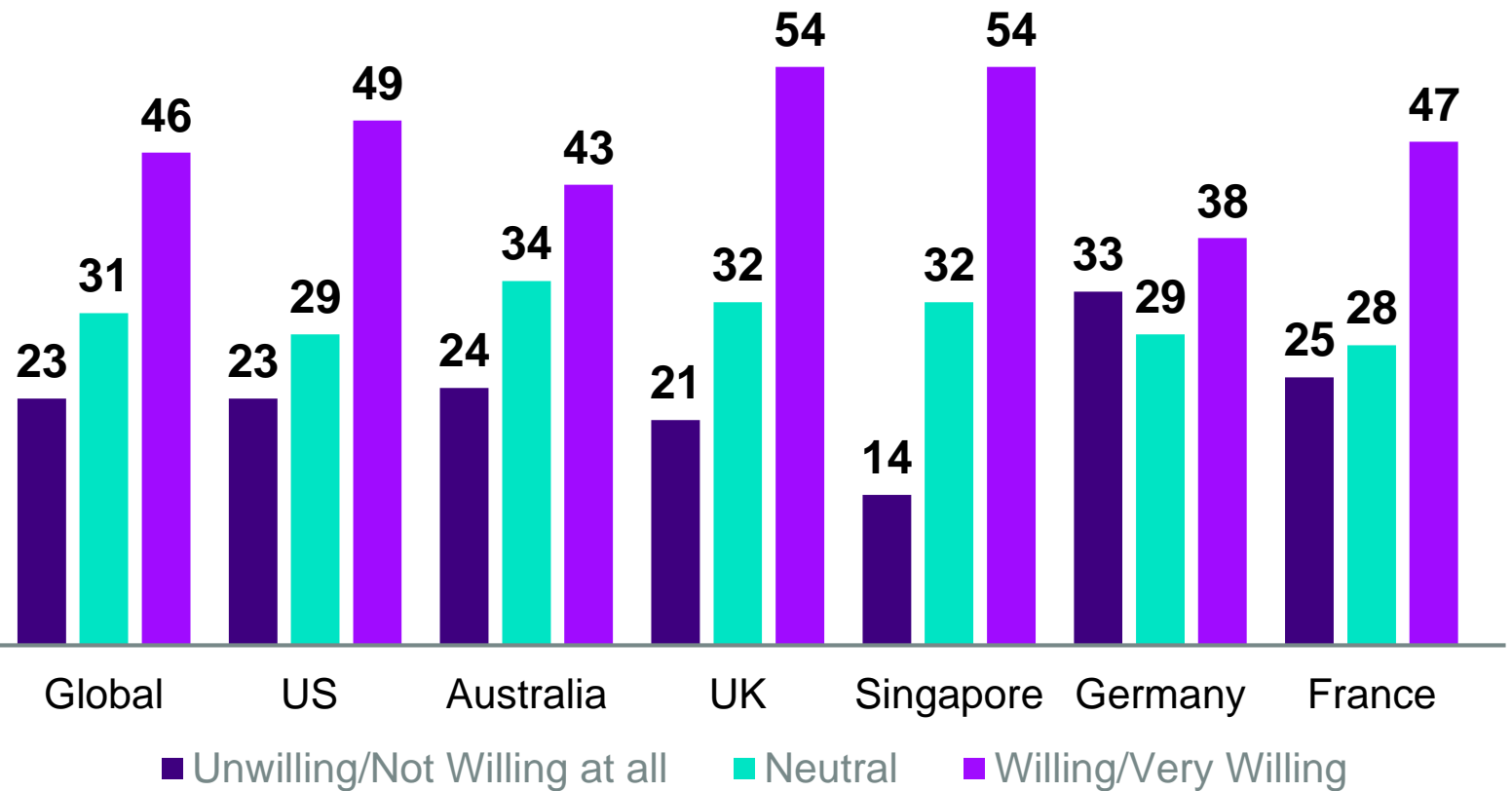


Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree.

BORDERS

Moderate percentages (38%-54%) would use mobile apps and social media to interact and share data (including biometrics) with government to speed up international travel.

To speed up travel across international borders, how willing would you be to use mobile apps and social media to interact and share data – including biometrics (e.g., scan of fingerprint, palms, face, eyes) – with the government?

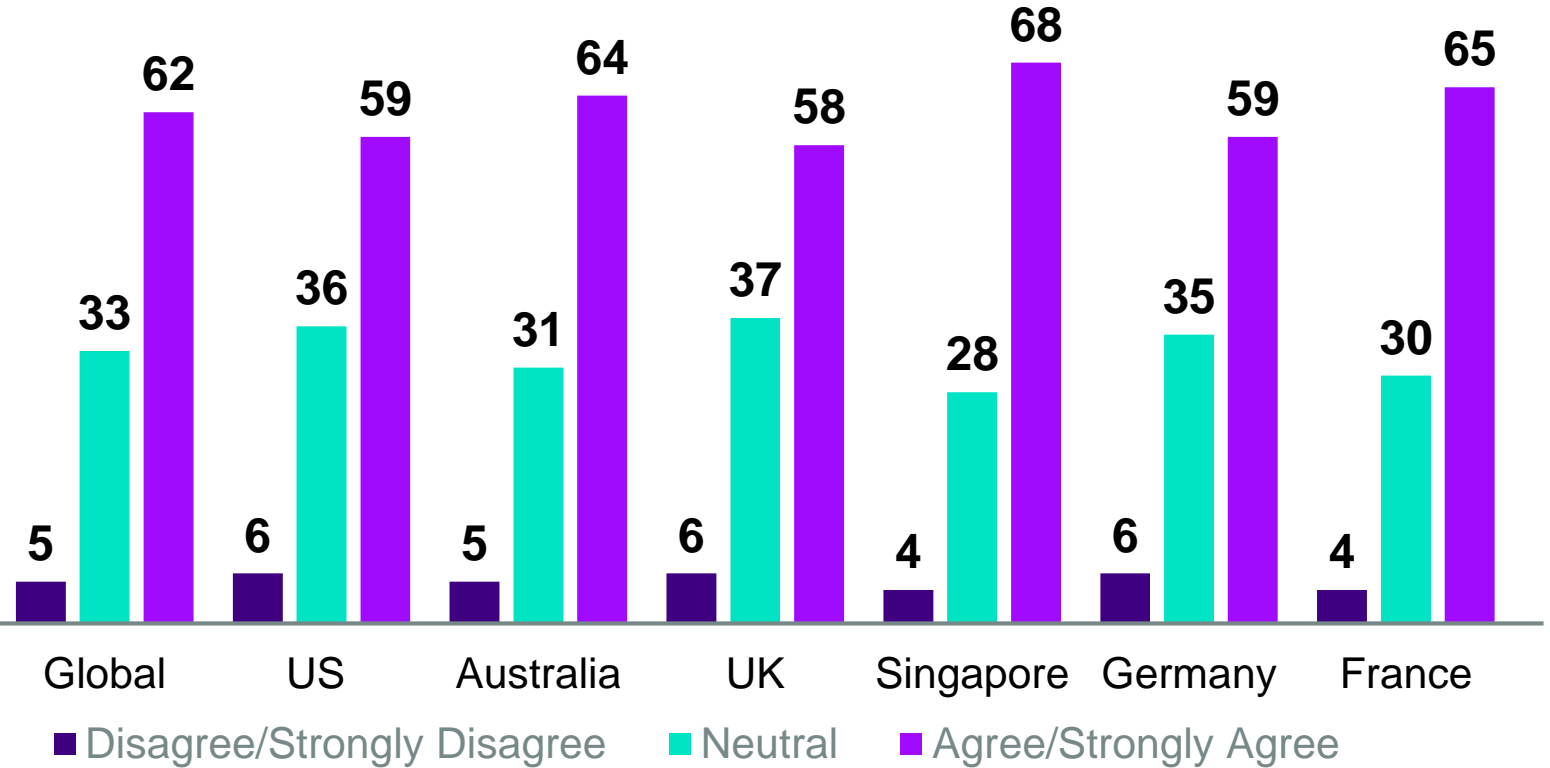


Percentages are based on a 5-point scale where 1=Not at all Willing, 2=Unwilling, 3=Neutral, 4=Willing, and 5=Very Willing

CONSULTING

Among all citizens surveyed, more than 6 in 10 (62%) expect public service organisations to use innovative technologies and solutions to improve service delivery while driving down cost.

I expect public service organisations to use innovative technologies and solutions to improve the services they deliver to me while driving down cost.



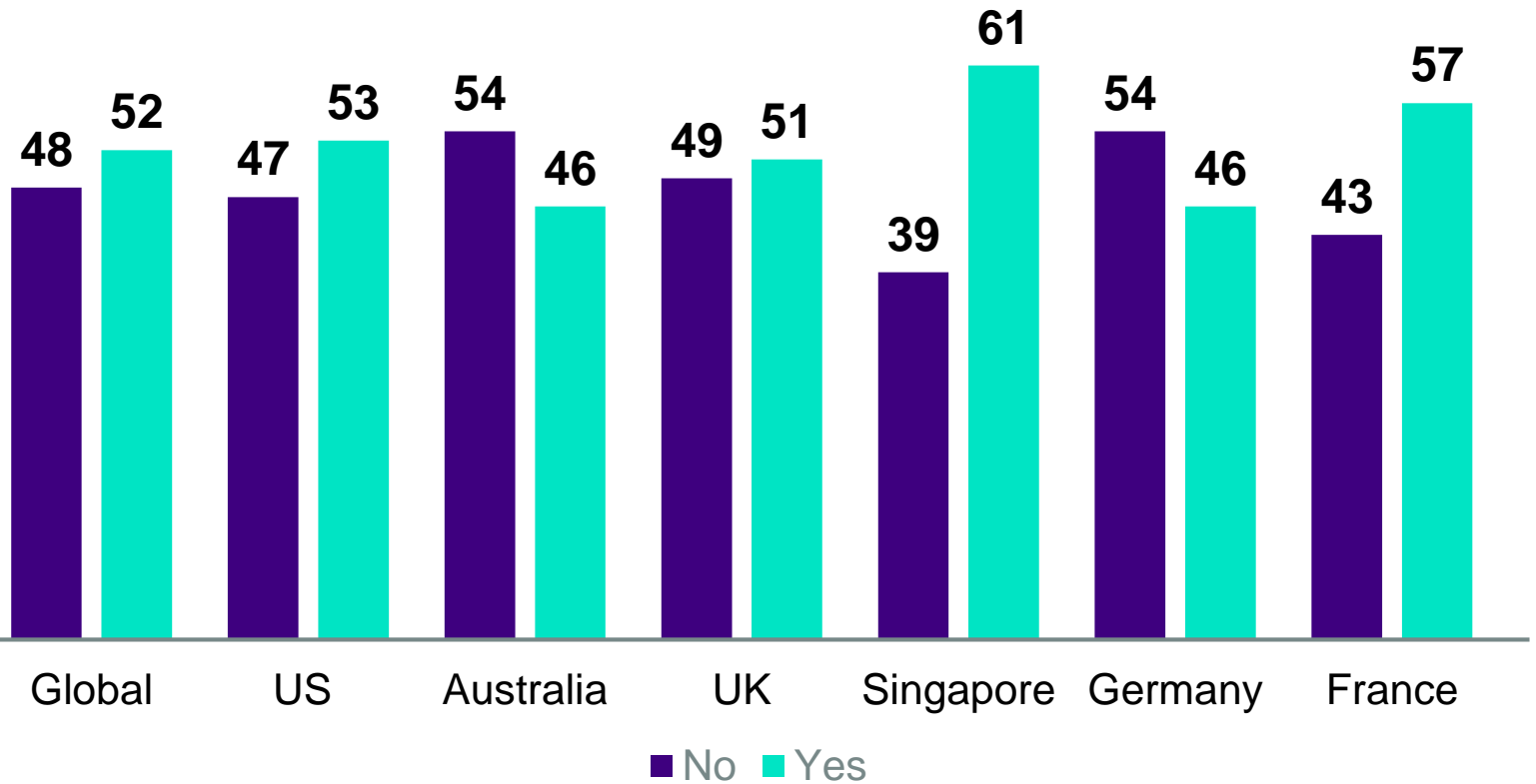
Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree.

**SUPPORT FOR AI REMAINS
MODERATE, WITH
GROWING INTEREST.**

REVENUE

A majority (52%) would like to see their tax authority create a virtual ID for public service and online shopping transactions

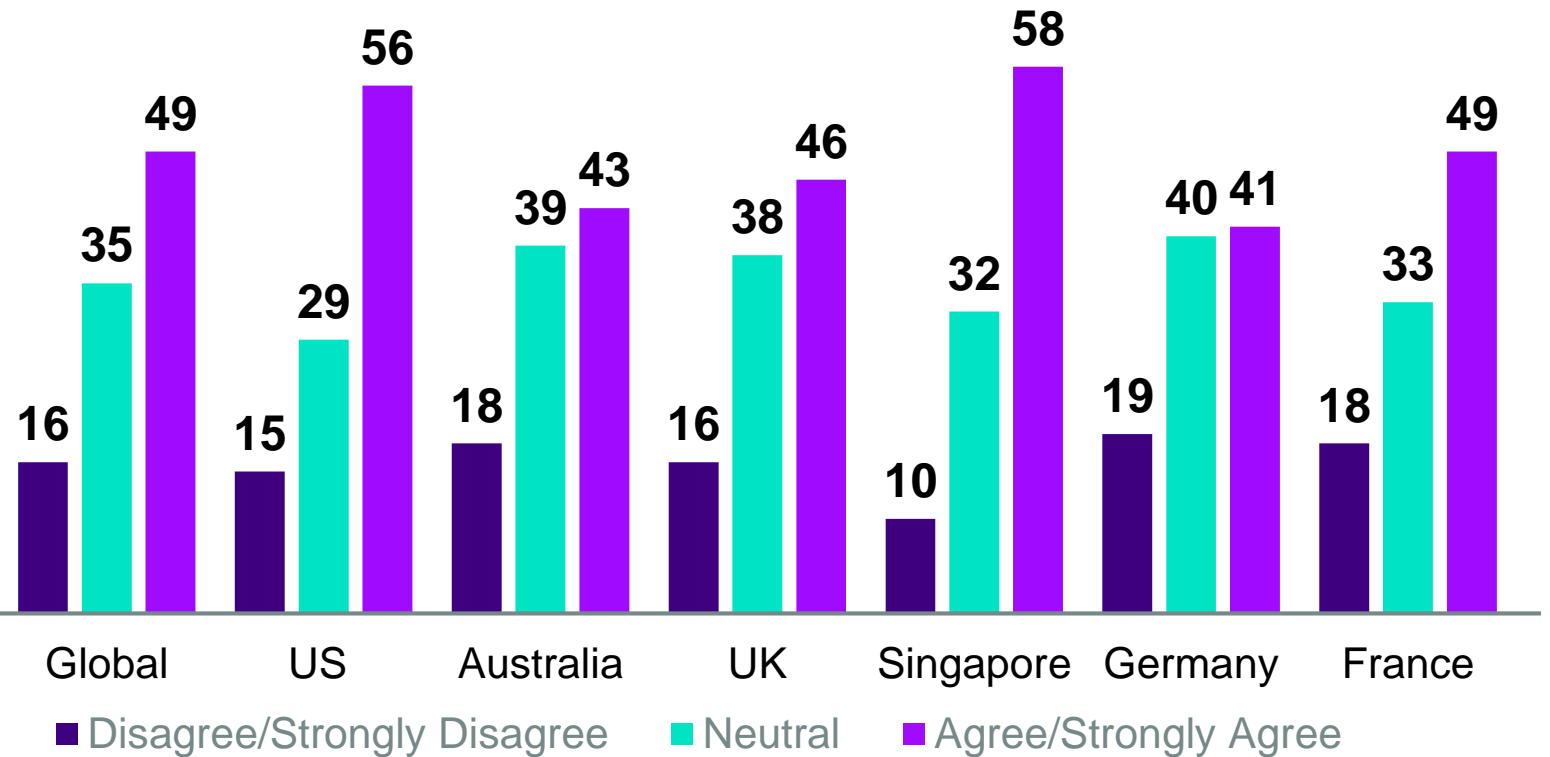
Would you like to see your tax authority create a virtual ID that you could use for all your transactions with public services and online shopping?



EDUCATION

About half (49%) think using a virtual assistant to help students manage course schedules and stay on track to graduate is an appropriate use of AI in higher education.

Using a virtual assistant to help students manage course schedules and stay on track to graduate would be an appropriate use of artificial intelligence (AI) in higher education.

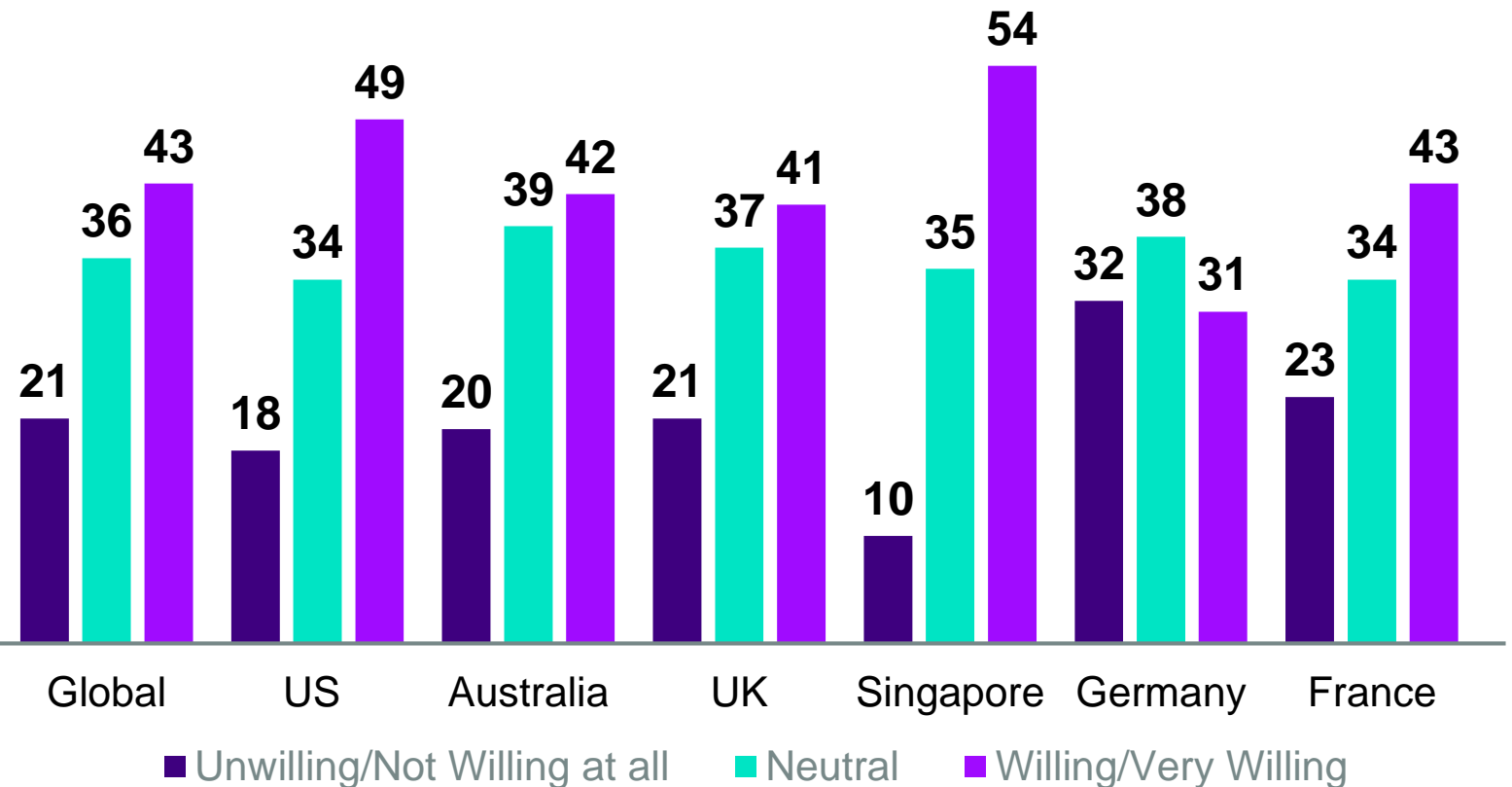


Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree.

BORDERS

About 4 in 10 (43%) support using AI-delivered services when crossing borders for a more secure, simplified experience.

When crossing international borders, how willing would you be to use services delivered by emerging technologies such as artificial intelligence (e.g., chat bots, robots, virtual assistants, intelligent machines) in return for a more secure, simplified experience?

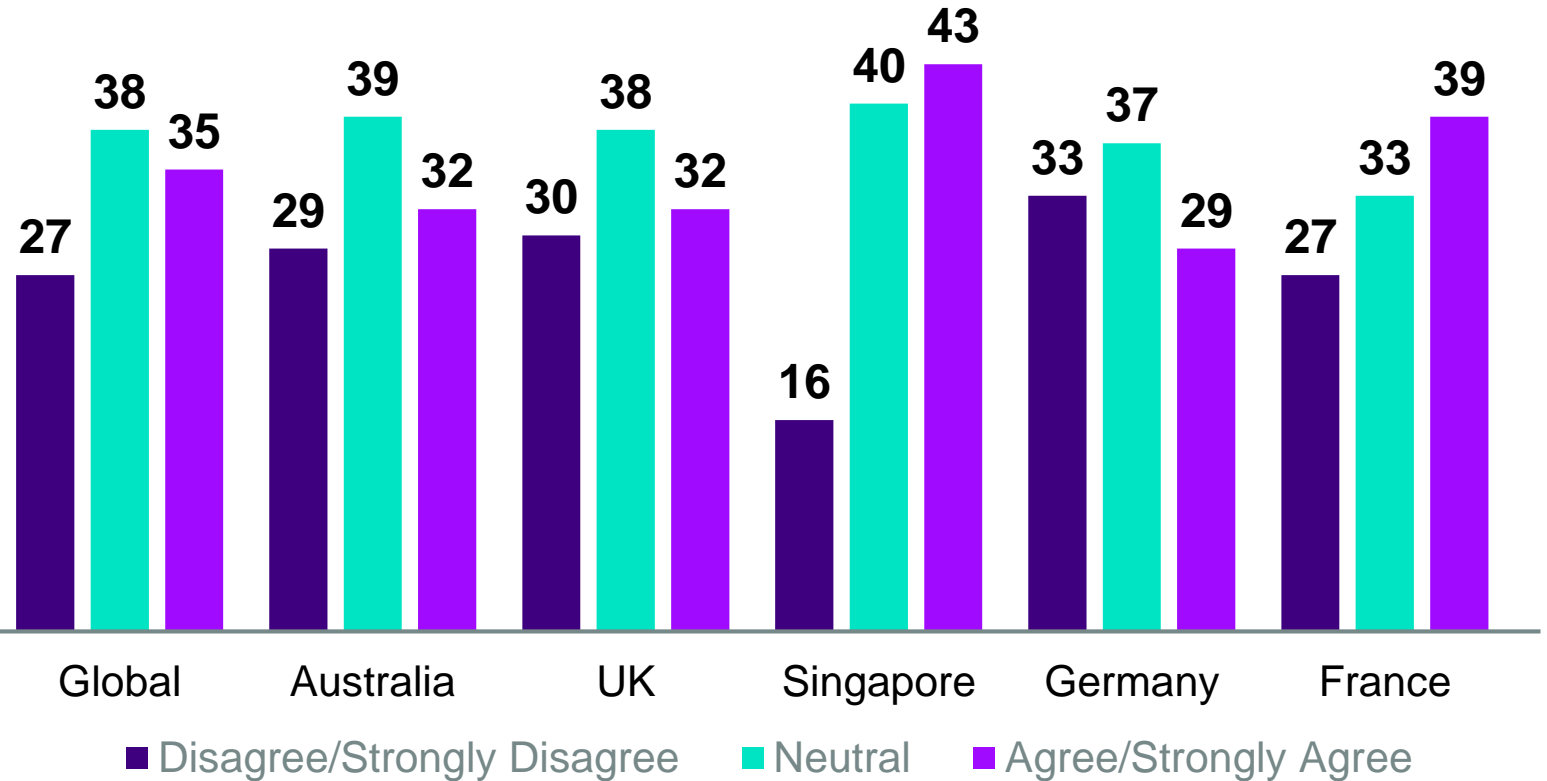


Percentages are based on a 5-point scale where 1=Not at all Willing, 2=Unwilling, 3=Neutral, 4=Willing, and 5=Very Willing

SOCIAL SERVICES

Only about 4 in 10 (42%) agree that using a virtual agent to help citizens get quicker responses to queries would be an appropriate use of AI in social services.

I am comfortable having artificial intelligence (e.g., chat bots, robots, virtual assistants, intelligent machines, etc.) used in other areas of my life and believe it could improve interactions with social service agencies.



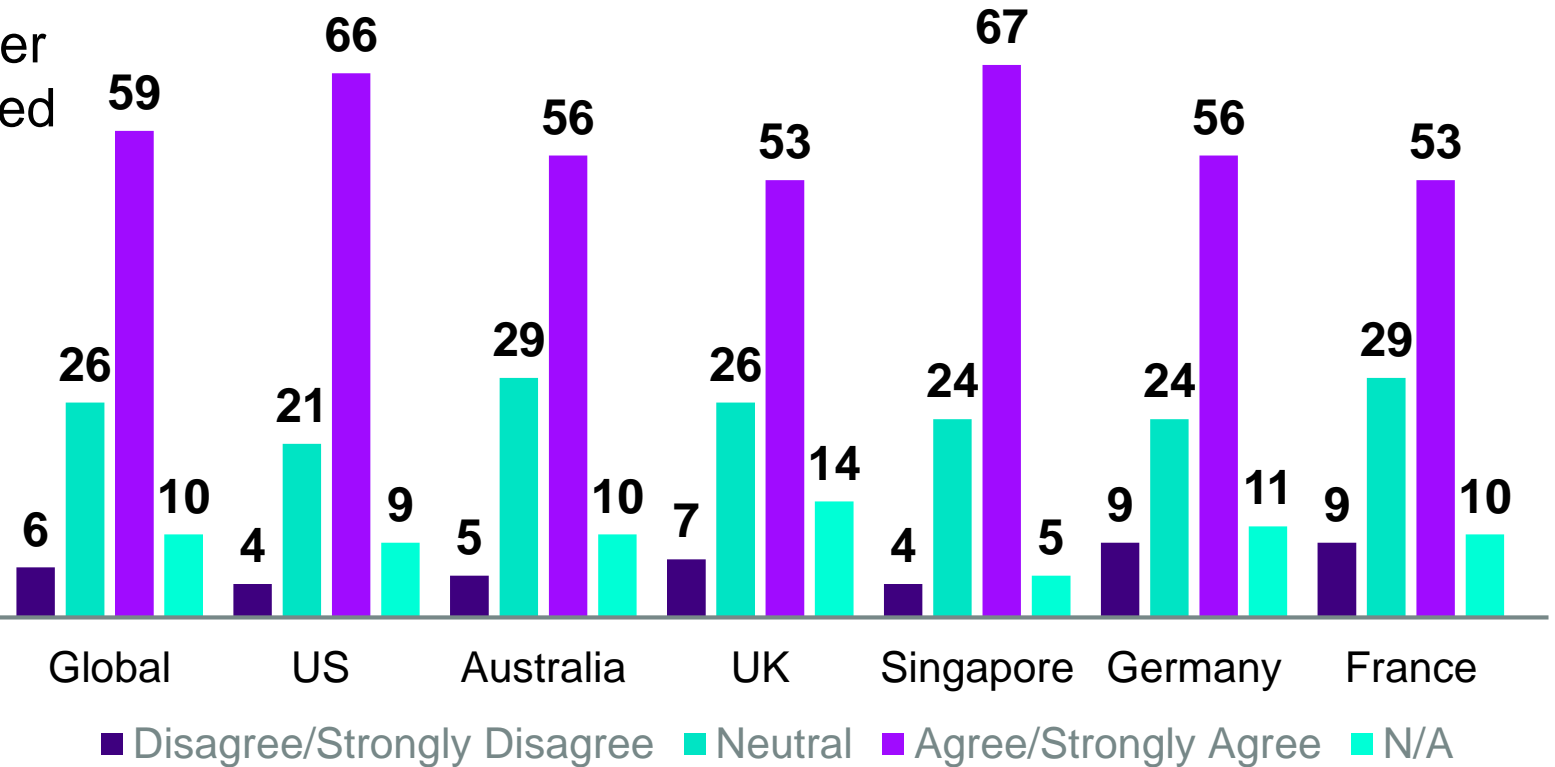
Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree.

**PERSONALISATION HAS
VALUE BUT IS UNDER-
DELIVERED.**

NONPROFIT

A strong majority (59%) think information about the real outcomes of charitable donations or volunteer work would create a more personalised non-profit experience 59%.

Informing me about the real outcomes of my charitable donations or volunteer work would create a more personalised experience for me with non-profit organisations to which I contribute.

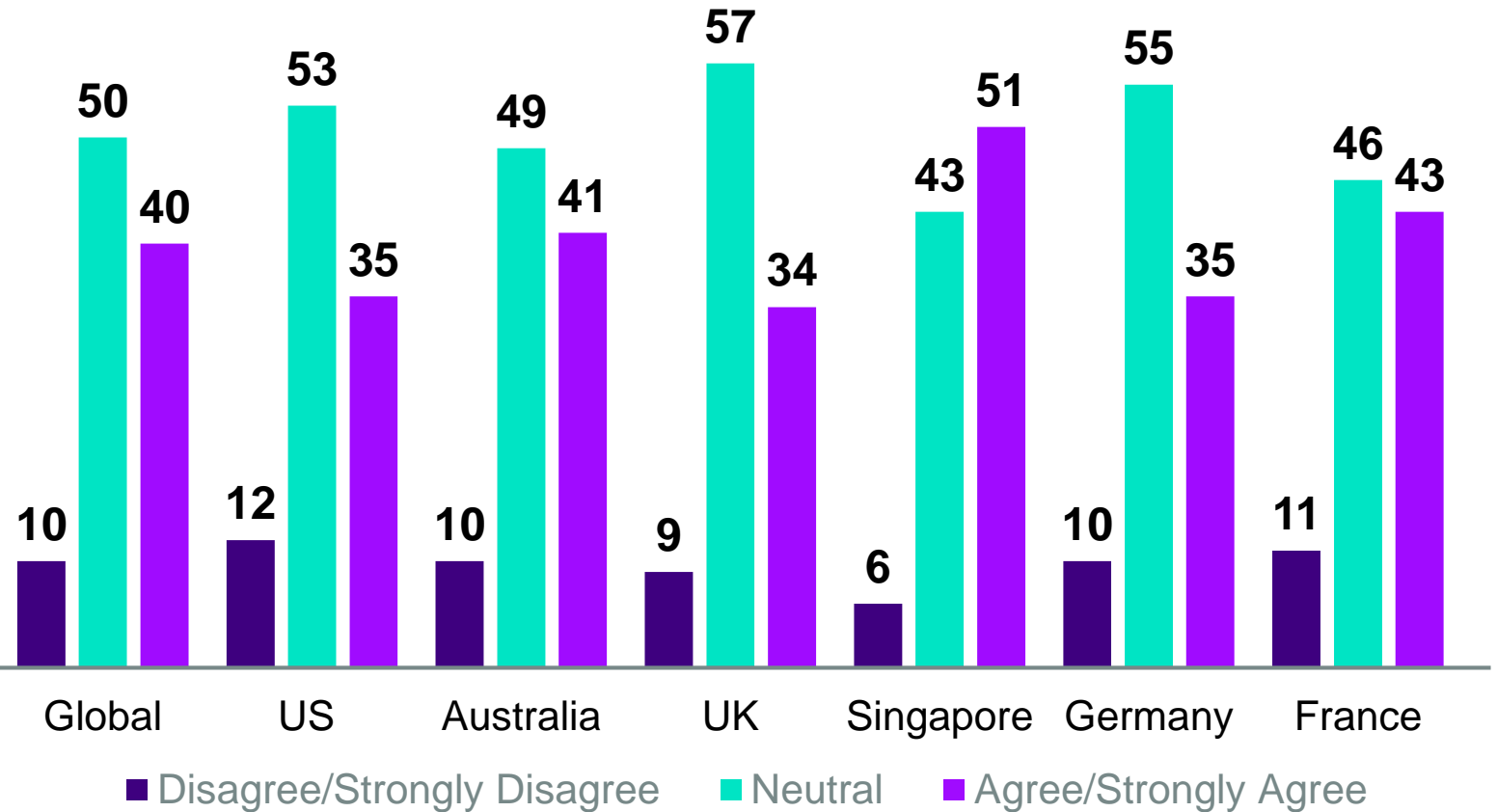


Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree

BORDERS

Only 4 in 10 are satisfied with the customer experience they have when dealing with border agencies – considering it personalised, easy to use and simple to understand.

I am satisfied with the customer experience I have when dealing with border agencies – either online or in person. It is personalised, easy to use, and simple to understand.

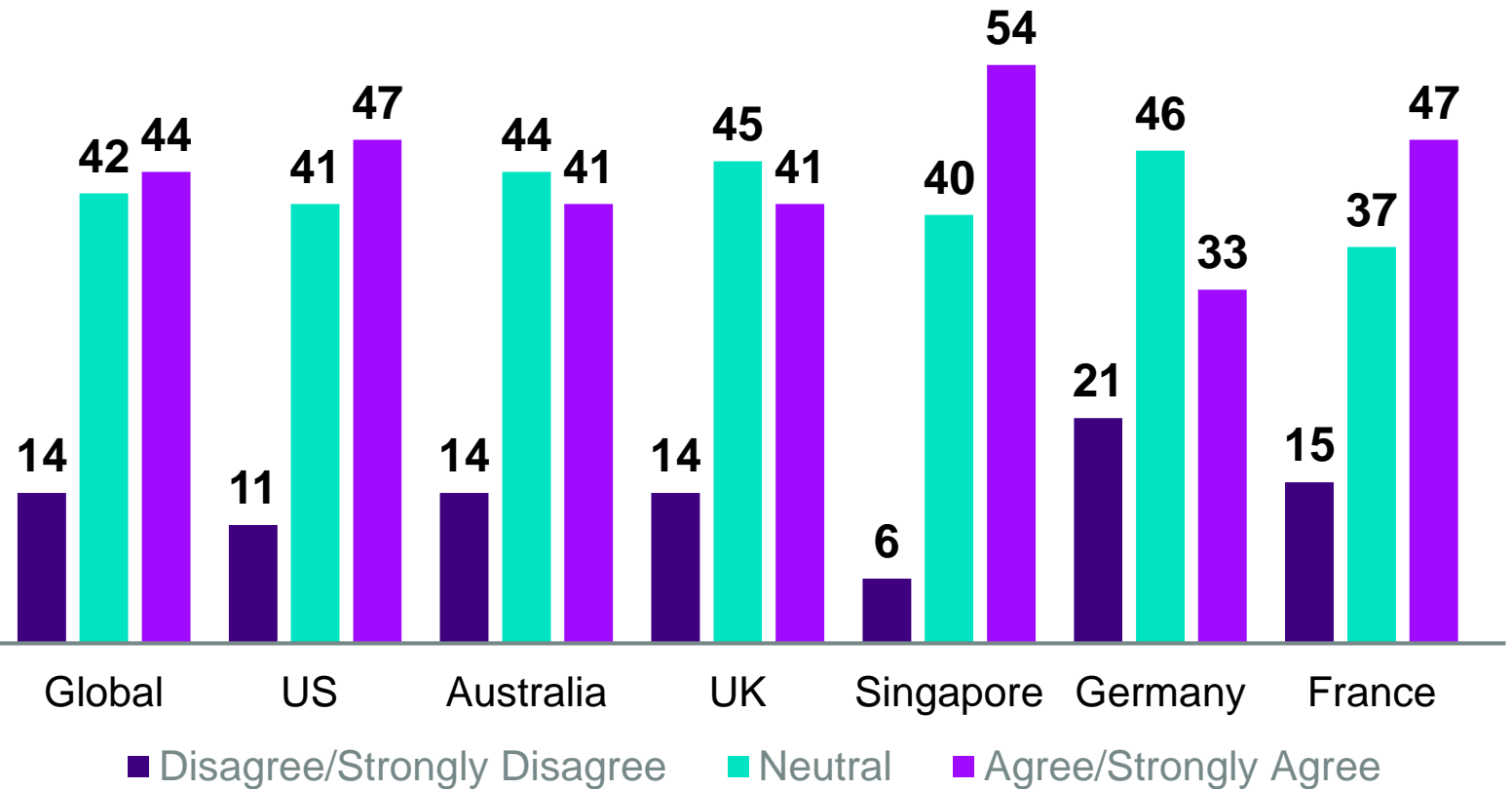


Percentages are based on a 5-point scale where 1=Strongly Oppose, 2=Oppose, 3=Neutral, 4=Support, and 5=Strongly Support

CONSULTING

44% want public service agencies to collaborate more with private sector digital organisations for a more personalised experience.

I want public service agencies to collaborate more with private sector digital organisations (e.g., start-ups, innovation labs, companies like Amazon and AirBnB, etc.) in order to give me a more personalised experience.

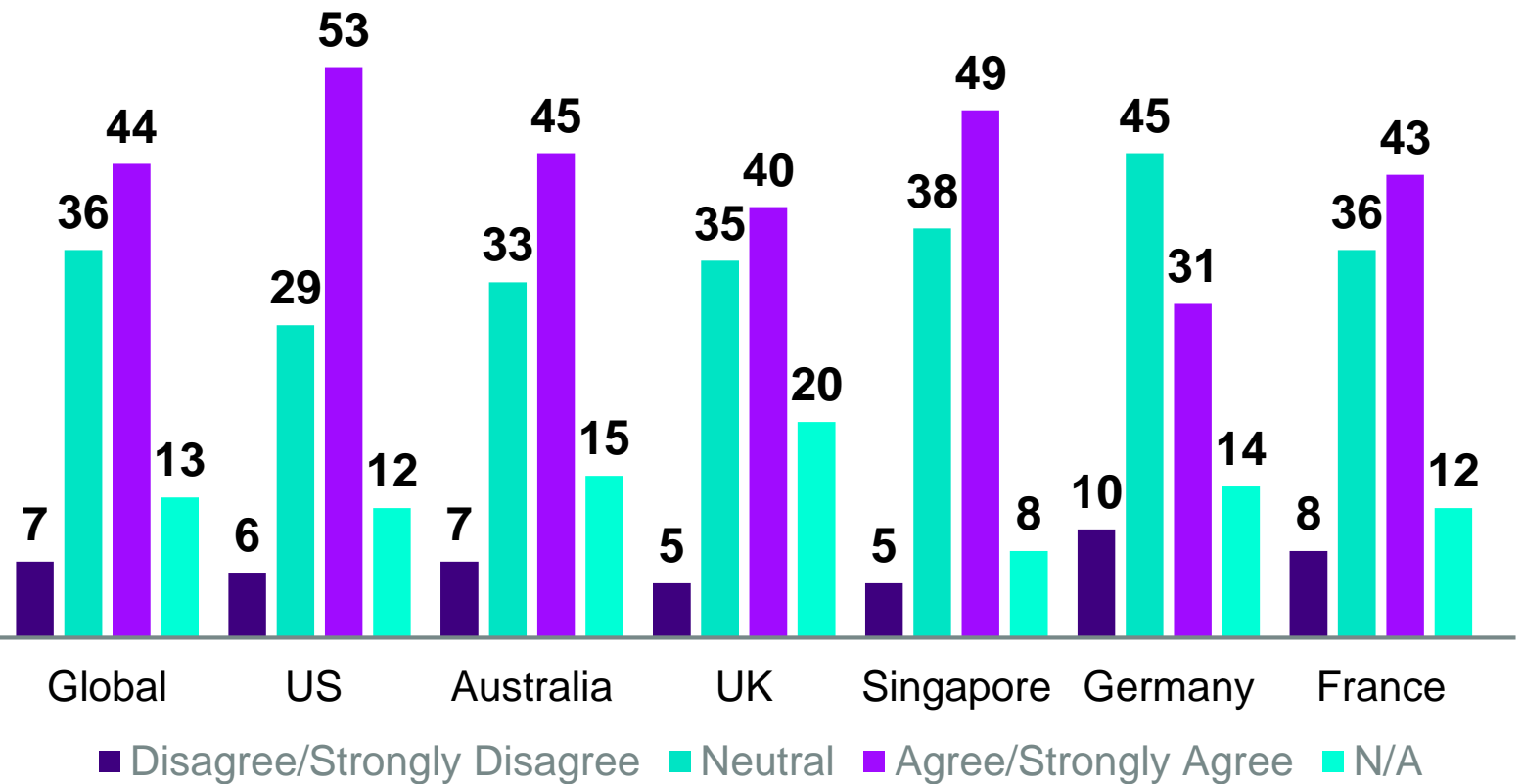


Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree

NONPROFIT

43% are satisfied with the personalised experience provided by nonprofit organisations to which they contribute to.

How satisfied are you with the personalised experience provided by the non-profit organisations to which you contribute?



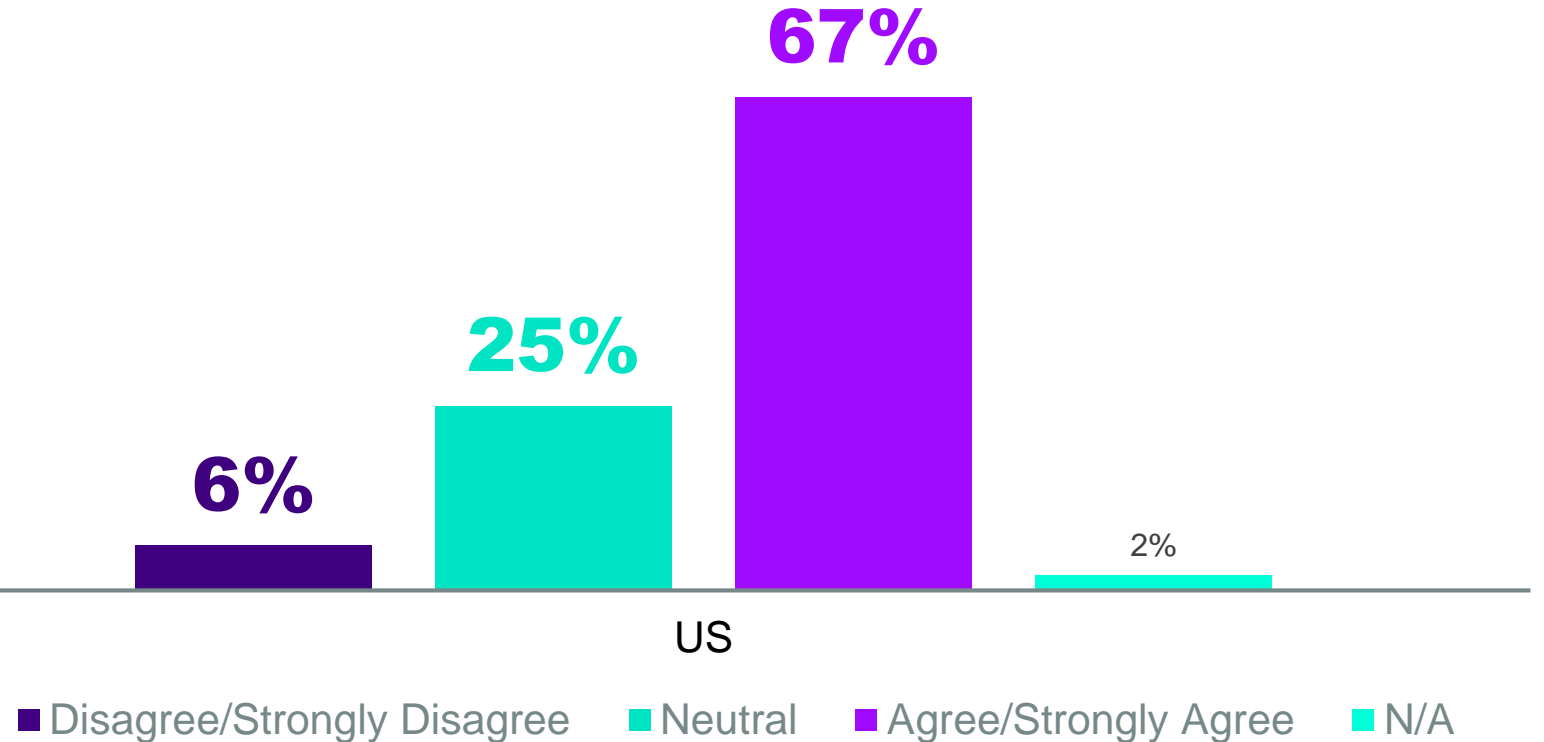
Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree

**CITIZENS WANT GREATER
CONTROL, ENGAGEMENT,
AND IMPACT.**

HEALTH AND HUMAN SERVICES

Two-thirds of US citizens will have greater confidence in the privacy and security of their data if the agencies who share it provide citizens with the ability to specify how it can be shared.

I will have greater confidence in the privacy and security of my data if the health and human services agencies who share it give me the ability to specify how it can be shared.

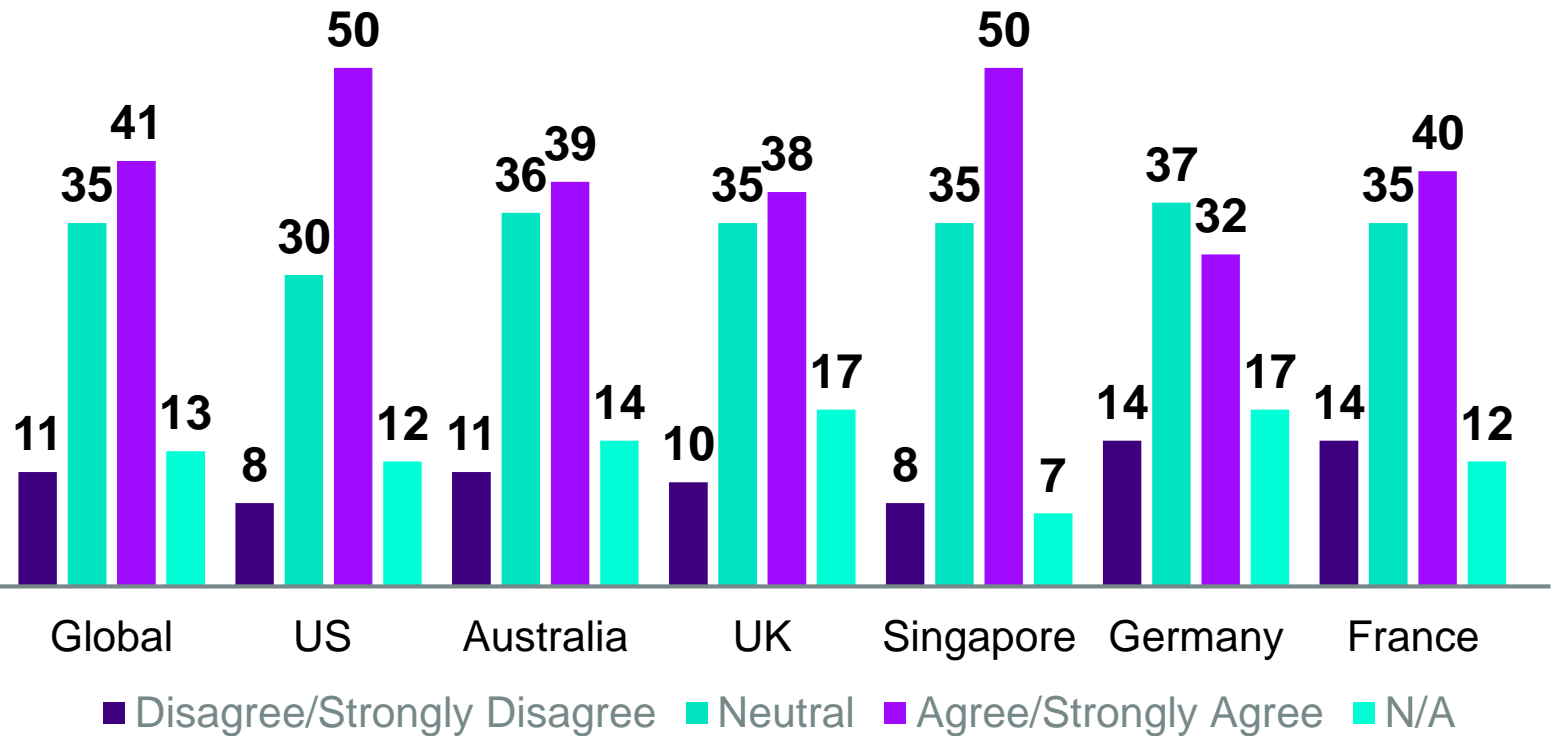


Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree.

NONPROFIT

Only 4 in 10 of all citizens surveyed think non-profit organisations to which they contribute are effectively using social media to engage/motivate them.

The non-profit organisations to which I contribute are effective at using social media in a way that engages and motivates me to share, promote, and spread the word about issues important to me.

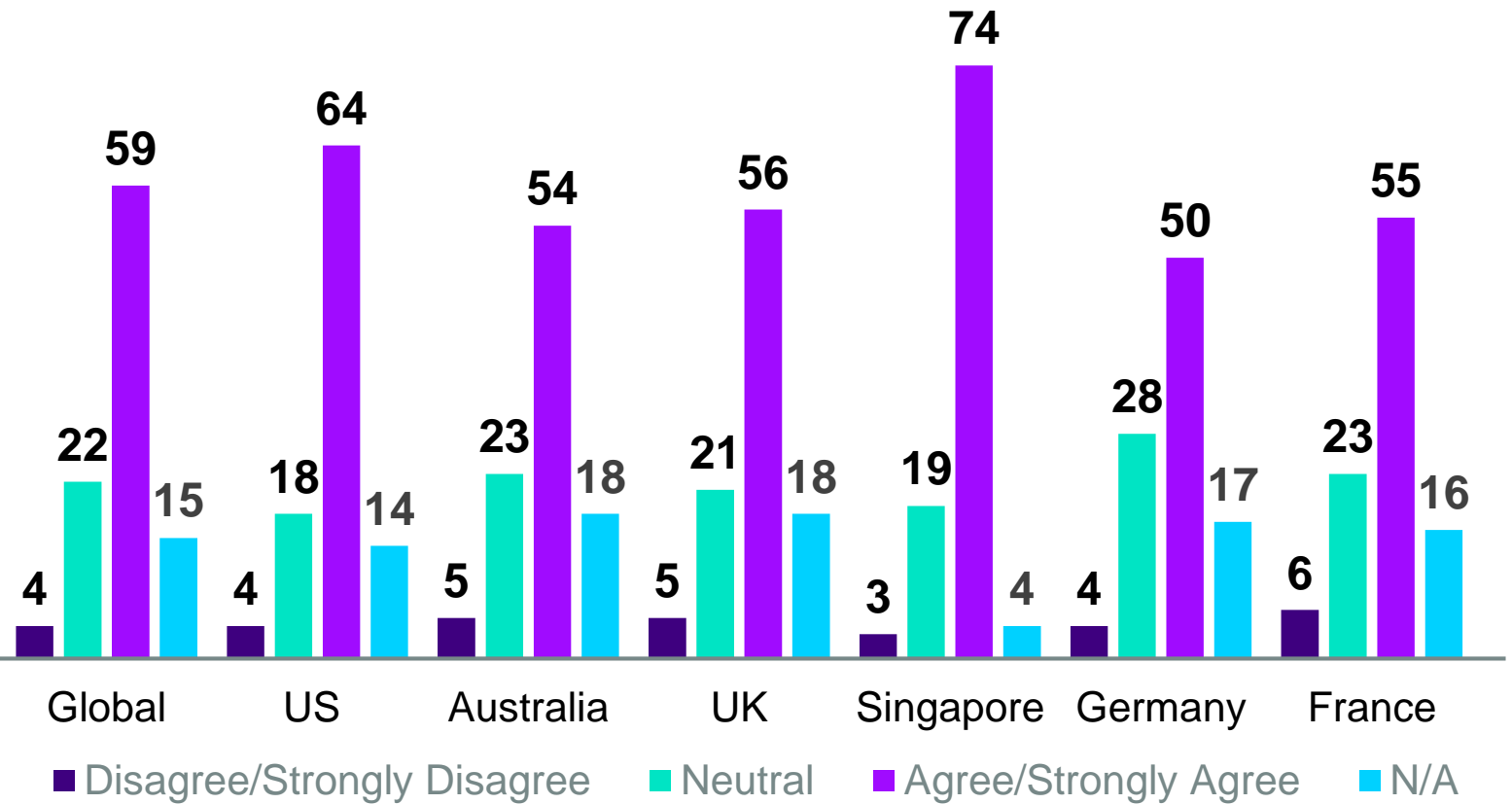


Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree.

CONSULTING

A strong majority (59%) are more likely to stay with their current employer if they know they will be making a positive impact inside or outside the organisation.

I am more likely to stay with my current employer if I know I will be making a positive impact inside or outside the organisation.



Percentages are based on a 5-point scale where 1=Strongly Disagree, 2=Disagree, 3=Neutral, 4=Agree, and 5=Strongly Agree.

APPENDIX

APPENDIX: SAMPLE DETAIL BY COUNTRY

		GLOBAL		US		AUSTRALIA		UK		SINGAPORE		GERMANY		FRANCE	
		Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
TOTAL POPULATION		6053	100%	1014	100%	1014	100%	1019	100%	997	100%	1004	100%	1017	100%
GENDER	MALE	2941	49%	476	47%	476	47%	502	49%	491	49%	507	50%	469	47%
	FEMALE	3112	51%	538	53%	538	53%	517	51%	506	41%	497	50%	536	53%
AGE	18-34 YEARS	2047	34%	389	38%	389	38%	390	38%	360	36%	239	24%	280	28%
	35-44 YEARS	1528	25%	231	23%	231	23%	256	25%	339	34%	187	19%	217	22%
	45-64 YEARS	1259	21%	330	21%	230	21%	192	19%	229	23%	226	23%	194	19%
	65 YEARS OR OLDER	1219	20%	164	20%	164	20%	181	18%	69	7%	352	35%	314	23%

MEET OUR SUBJECT MATTER EXPERTS



GOVERNMENT AS A PLATFORM

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MEET OUR SUBJECT MATTER EXPERTS



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MEET OUR SUBJECT MATTER EXPERTS



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MEET OUR SUBJECT MATTER EXPERTS



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