

Build It and They Will Come?

The Accenture Digital Citizen Pulse Survey
and the Future of Government Operations



High performance. Delivered.



The majority of people responding to a new Accenture survey say they would use digital services if offered by government, especially for routine transactions. And over half want to conduct all their government business digitally in the future. The biggest challenge for government is not catching up with the private sector—it's giving digital citizens what they want while using digital channels to improve public value.

The digital citizen has arrived

From online portals to mobile to self-service kiosks, the rise of digital has forever changed how people live and work. Consumer demand for access, relevance and personalization has redefined business-to-consumer interaction in every industry.

The digital wave is also transforming the relationship between citizens and government. Governments at local and national levels worldwide are building and enhancing digital channels and government solutions for citizen access and interaction and are at different phases of the journey. Each must address its own opportunities and obstacles, such as differences in public debt, resources and existing government IT infrastructure, while navigating unique social, cultural and political realities.

Digital citizens are empowered in a way that people in previous generations never were. They can initiate and dictate the dynamics of the citizen-to-government relationship in a whole new paradigm. As such, one aspect of successful, sustainable digital government is to align initiatives with the intent, expectations and preferences of digital citizens.

It is an important move for government operations because digital interactions save money—they cost 80 percent less than non-digital interactions. They also free up time for citizens to be productive because they can conduct their government business more conveniently.

While the past few years have seen increased availability of online services for citizens, many are still clamoring for more. Moving past this potential disconnect between what governments are doing and what citizens want—and getting digital right so that it is a well used and preferred channel—means that governments must take a strategic approach that accounts for a range of external and internal influences. Understanding citizen perceptions is an important starting point. So how do citizens view digital government? What digital channels do they use today? Which channels do they expect to use tomorrow?

Background

The Accenture Digital Citizen Pulse Survey explores questions like these and is designed to take the temperature of trends shaping people's understanding and experience of digital government now and into the future.¹

This online survey included more than 1,400 respondents from Australia, France, Germany, India, Singapore, the United Kingdom and the United States. Forty-one percent of respondents live in urban areas, 33 percent reside in suburban areas, and 26 percent live in rural areas or small towns. Sixty-seven percent of those completing the survey were between ages 18 and 45 when the survey was conducted in November 2011.

Nearly all the respondents are connected—only one percent report using no connected devices such as computers, smartphones, tablets, e-readers and game consoles in their households.² In fact, one-half of respondents use three or more connected devices to access the Internet at home. The majority of respondents also report that they have a broadband Internet connection at home, with one-quarter saying that they have a home network connecting more than one device.

The objectives of the survey were to:

- Understand the digital interactions between citizens and government.
- Explore any differences in digital government interactions based on various demographic classifications.
- Determine current and future channels used for different types of government transactions.
- Gauge the likelihood of citizens using various digital services for government transactions.
- Discover general attitudes toward the digitization of government operations.

¹ Respondent answers are not necessarily representative of the population as a whole, but give helpful insight into trends among connected digital citizens.

² This high level of connection is likely due to the fact that the survey was conducted online.

Key findings

Access is everything

The survey findings reveal an encouraging story of progress in digital government that begins with some surprising citizen perceptions around how they view access to and interactions with government in general—through both traditional and digital channels.

Historically, governments have often had an unfair reputation when it comes to citizen service. The notion that government service is about long lines, longer response times, cumbersome processes and confusing procedures is not uncommon. As a point of comparison, the private sector is often held up as a beacon of speedy, streamlined, customer-first service.

Challenging these stereotypes, nearly one-half of respondents find interacting with the government and accessing government services easy while only one-quarter report that it is difficult.

When asked how they would compare accessing government services and private sector services, 42 percent of people surveyed say it is about the same. Twenty-nine percent report that it is actually easier to access government services (see Figure 1). Generally, those that find it easy to interact with government also say it is easier to access government services than private sector services. The inverse is also true: Those who find interacting with the government difficult tend to report that it is easier to access private sector services.

These response trends reveal an interesting consideration. In certain geographies and with certain populations, though there is work to be done, governments may have come farther in their game of catch up with the private sector than many observers have suspected.

As governments become more digital, access should only improve—63 percent of survey respondents agree that digital

interactions will make the government more easily accessible. Moreover, 51 percent of respondents believe that the ability to interact digitally with government would encourage them to be more engaged with government, while 49 percent say that digital interactions would make the government more transparent. All of this is good news for the future of a communications channel rooted in access, engagement and transparency.

But delivering on the promise of digital government—one that those surveyed overwhelmingly embrace—will mean that government solutions must actively and strategically meet the needs of digital citizens who are open to and wired for digital government, and on terms that work for both parties. All the while, public service management must continue to address the real challenges associated with the digital divide, bringing more citizens into the digital age.

Figure 1. Ease of Accessing Government vs. Private Sector



Align channels and services

Meeting digital citizens where they are begins with understanding the digital channels that they are most likely to use. It is important to remember that digital is not a monolithic access and interaction channel. Instead, it encompasses a variety of services including the following:

- **Website or portal.** A secure Internet site allowing self-service for multiple transactions across government organizations.
- **Mobile websites and apps.** Secure websites optimized for mobile devices and downloadable applications specifically for mobile devices that allow self-service for many transactions.
- **Digital post.** A government-provided electronic mailbox for bills and government correspondence that could eventually replace physical postal mail.

- **Electronic emergency broadcasts and alerts.** A service that sends emergency alerts via e-mail or mobile device.
- **Electronic renewal alerts.** A service that sends alerts via e-mail or mobile device as reminders of recurring or time-sensitive transactions.
- **Secure identity as a service.** A single identity enabling access to all government and private sector services.

Asked which of these channels they would be most likely to use if offered by the government, the majority of survey respondents are open to all of them, with emergency broadcasts, electronic renewal alerts and a website or portal being the most likely to be used (see Figure 2).

Understanding channel preferences is one thing, but as the survey shows, it is critical for governments to understand citizens' digital channel preferences within the broader context of the types of transactions conducted.

Consider possible government interactions in three distinct phases—initiation, resolution, and tracking and payment, which include the following transaction types:

Initiation

- Notifying government/public services of an issue
- Making inquiries
- Submitting forms

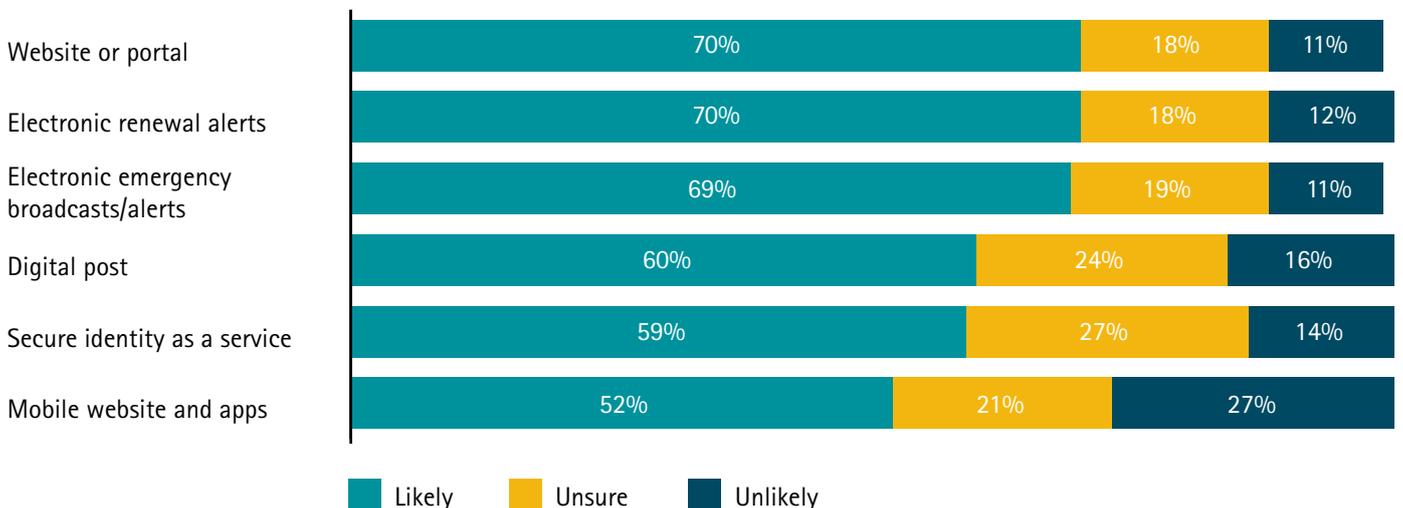
Resolution

- Resolving an issue

Tracking and Payment

- Receiving notifications
- Tracking the progress of submitted forms
- Making a payment
- Using secure identity as a service

Figure 2. Digital Services That Citizens Are Most Likely to Use



A look at how respondents are currently using digital channels to conduct government transactions reveals a fundamental split in those they conduct digitally and those they conduct via traditional channels. Overall, respondents are comfortable interacting with the government through the Internet and e-mail for tasks in the initiation phase. They also prefer to use the Internet for tracking and payment purposes. However, most prefer to speak to someone either in person or on the phone to resolve issues.

In addition, when asked about their use of social media to connect with government, 49 percent of respondents say they would not use it to contact a government official to request a service or resolve a problem. Perhaps this is because social media often privileges scale over personalization and privacy as a one-to-many communication channel. But with the popularity of social media, and its recent role in grassroots political movements around the world, there is clearly a place for greater use of social media in the digital government dialogue because citizens are using social media in other aspects of their lives. The task for governments will be to figure out the best use of this channel.

Asked about the future, respondents indicate a desire to use the Internet and e-mail for most government transactions. Fewer say they would like to use their mobile devices, self-serve kiosks or social media for these types of transactions. However, 60 percent still would prefer to speak to someone in person or over the phone to resolve issues. It seems that citizens still hold on to traditional channels in some ways, and that part of government's role in the digital evolution is to build trust in new channels of communication just as the banking industry has done in making online banking more acceptable in many countries.

These findings also reveal the importance of the concept of "citizen" in digital citizen. As sophisticated as digital channels become, there will always be a need for human contact, particularly in the most personal of government services—from pensions and child support to welfare and social security. As government solutions move more and more services online and on-the-go, the challenge will be to find creative ways to infuse digital with the human element that even the most savvy digital citizen will expect for certain transactions.

Move through the barriers

As governments move toward delivering public service of the future, part of this commitment is to deliver citizen services at the point of need—the right service to the right person at the right time. Digital government solutions will play a significant role in the realization of this vision—as long as citizens see it the same way.

Despite the apparent enthusiasm for digital government, three-quarters of survey respondents believe that there are barriers to interacting with the government digitally. Even if respondents may not believe these barriers apply to their own situations, they do see them applying more broadly.

Among those people who see barriers to digital government interactions, the most significant one is that they do not want government to have access to their personal data. Lack of awareness of digital channels is another barrier—one-third of respondents say they are not aware of the ways to interact with the government digitally. Another third simply prefer to interact with the government in other ways. Further, one in five respondents believe other ways of interacting with government are more available, digital interactions are too complex and that it is difficult to access digital channels.

Respondents' hesitancy to share personal data with government is a finding that deserves more exploration. The hesitancy could stem from a lack of trust—only 44 percent of those surveyed say that they trust the security of digital interactions with the government. Lack of awareness, myths and misperceptions around government as "Big Brother" or loss of control likely factor in as well. Cultural differences also shape attitudes here. In the Nordic countries, for example, citizens are generally much less concerned about sharing their personal information compared to the United Kingdom or the United States.

What is clear is that some citizens will struggle with the apparent double bind of their desire for more accessible, anytime, anywhere government operations and their need to hold personal data close. Moving forward, governments must address this issue head on so that it does not become a significant obstacle to adoption of digital programs. One key will be for governments to present the move to digital as a social contract—that the "return" of sharing data is greater access, more personalized services and other benefits that people want.

Citizen perspectives from around the globe

Australia

Half of Australian respondents find it easy to interact with the government. However, eight out of 10 indicate that they find it easier or about the same to access private sector services when compared to government.

Respondents are split as to whether they prefer to initiate interactions with the government over the phone or digitally via e-mail or the Internet. While they expect use of non-digital channels to decrease for these tasks in general, phone is still expected to be one of the preferred channels for initiating interactions. The Internet is vastly preferred for tracking and payment purposes both now and in the future. Speaking to someone on the phone is currently, and will continue to be, the preferred channel for resolving issues, although increases are expected in digital channels.

One-quarter of Australian survey respondents believe that there are no barriers to digital interaction with the government. Approximately three out of 10 identify not wanting the government to have their personal data and a preference to interact with the government in other ways as the greatest barriers to digital interaction with the government.

France

Three-quarters of French respondents find it easier or about the same to access private sector services when compared to government.

These respondents also tend to initiate interactions with the government in a variety of ways, and will likely decrease their use of non-digital channels in the future. They lean slightly toward digital channels such as the Internet and e-mail for tracking and payment purposes. French respondents still prefer to resolve issues in person, even though they will likely increase their use of digital channels for this in the future.

More than one-third identify no barriers that prevent them from interacting with the government through digital channels. Of those who report barriers, three in 10 cite not wanting the government to have their personal data as the greatest barrier to digital interaction.

Germany

Three-quarters of German respondents find it easier or about the same to access private sector services when compared to government services.

Citizens in Germany tend to initiate interactions with the government via non-digital channels currently; however, they expect decreases in these channels and increases in digital ones in the future. They also prefer in person or postal mail for tracking and payment currently, although many are willing to use the Internet for these tasks both now and in the future. Issue resolution is also a task that German citizens prefer to do in person, although they will likely increase their use of digital channels in the future.

Nearly half of all Germans surveyed mention that the greatest barrier to interacting digitally with the government is not wanting their personal information to be shared with the government. Only 14 percent indicate that there are no barriers preventing them from interacting with the government through digital channels.

India

Half of respondents in India find it easy to interact with the government; however, citizens are split nearly evenly as to whether it is easier to access government or private sector services.

Respondents in India are equally likely to use all channels except postal mail to initiate interactions with the government, with decreases expected for non-digital channels in the future. They prefer to use the Internet for tracking and payment

tasks both now and in the future.

Currently, citizens overwhelmingly prefer to speak to someone in person to resolve issues, although increases are expected for Internet use in the future.

Nearly one in five Indians surveyed identify no barriers that prevent digital interactions with the government. Of those who report barriers, one-third mention not wanting the government to have all of their data and preferring to interact with the government in other ways as the greatest barriers.

Singapore

More than one-half of respondents in Singapore find it easy to interact with the government, and eight out of 10 report that it is easier or about the same to access government services as compared to private sector services.

People in Singapore are equally likely to use the Internet, e-mail or the phone to initiate interactions with the government currently, and expect decreases in non-digital channels in the future. They prefer the Internet, and secondarily e-mail, for tracking and payment purposes both now and in the future. Citizens are split between phone and e-mail for resolving issues both currently and in the future, although they expect a decrease in non-digital channels and an increase in digital ones in the future.

Approximately three out of 10 people surveyed in Singapore identify not wanting the government to have their personal data and not being aware of ways to interact with the government/public services digitally to be the greatest barriers to digital interaction with the government. One-third of citizens report that there are no barriers to digital government interaction.

United Kingdom

Approximately half of those surveyed find it easy to interact with the government. Accordingly, the majority of respondents in the United Kingdom (UK) also find it easier or about the same to access government services when compared to private sector service access.

Citizens in the UK use a variety of methods to initiate interactions with the government currently, and expect to decrease their use of non-digital channels in the future. They tend to use the Internet for tracking and payment purposes, but prefer phone interactions when resolving issues.

Approximately one-quarter of UK respondents indicate that there are no barriers preventing them from interacting with the government through digital channels. However, another quarter mention not being aware of ways to

interact digitally and not wanting the government to have access to personal data as the top two barriers that prevent digital interaction.

United States

Approximately three-quarters of United States respondents find it easier or about the same to access private sector services when compared to government services.

US respondents are willing to use the Internet or phone to initiate interactions with the government currently, with decreases in non-digital interactions expected in the future. They also prefer to use the Internet and postal mail for tracking and payment purposes, but will likely decrease their use of postal mail in the future.

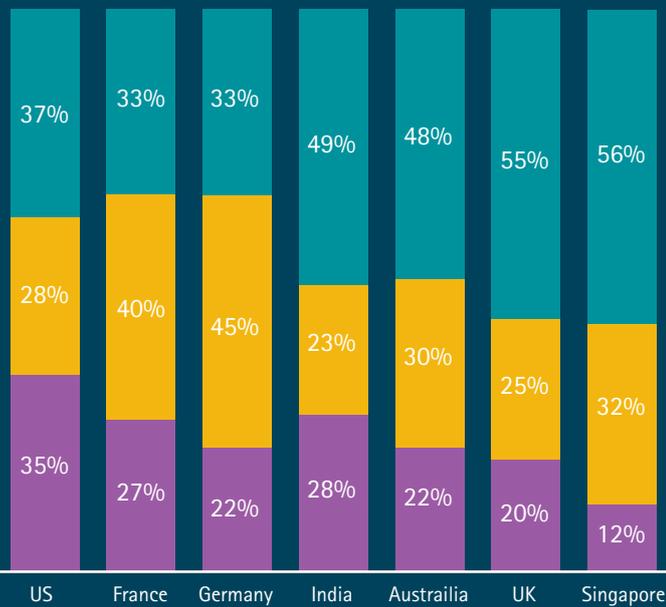
Although willing to use digital channels for many interactions with the government,

the plurality of US respondents still prefer to speak to someone on the phone to resolve issues.

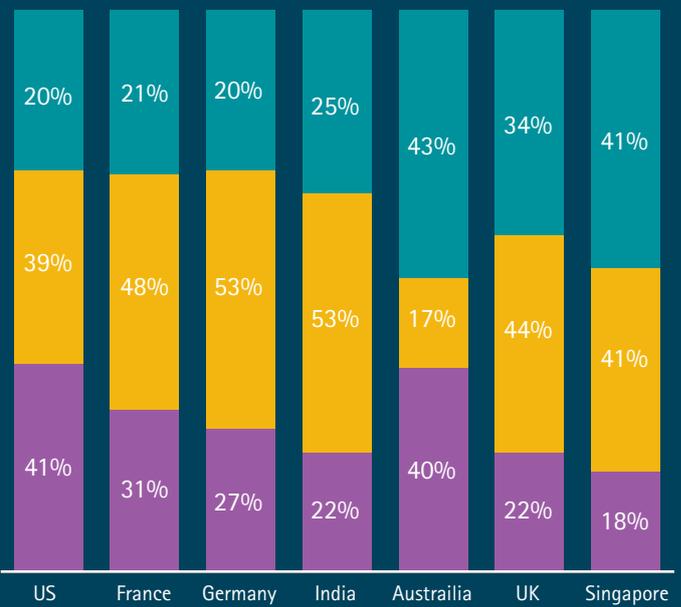
Nearly one-quarter of respondents identify no barriers that prevent them from interacting with the government via digital channels. However, three out of 10 mention not wanting the government to have their personal data, preferring other methods of interaction and being unaware of ways to interact digitally as major barriers to digital interaction.

Figure 3.

Interacting with Government by Country



Ease of Access by Country



- Easy to interact and access
- Neither easy or difficult
- Difficult to interact or access

- Easier to access government/public services
- About the same
- Easier to access private sector services

Moving forward

In many ways, the responses to this survey validate what the world's governments already know—that digital government solutions are a reality for government operations, and that the digital citizen is more than ready for them. Yet response trends also point to some new, actionable insights for governments as they develop their digital government initiatives:

- **Ride the wave.** Positive citizen perceptions around access to government through both traditional and digital channels provide an excellent starting point for governments. Governments with resources to invest can commit to improving access and engagement with digital. Those that must cut costs must do so in a way that builds in digital capacity while locking in strategic gains to date. Either way, digital has the inherent potential to create its own efficiency gains, a clear benefit in any funding environment.
- **In with the new.** To build effective digital government services that are consistently used by citizens, governments must avoid the trap of simply replicating and digitizing old processes that are inherently ineffective. Instead, when going digital, governments must take a holistic look at existing processes and build online services with a differentiated approach that takes into account, and full advantage of, the entire spectrum of benefits of the online channel.
- **Mind the gap.** While many citizens are connected today, the digital divide is still a critical concern in countries as diverse as the United States and India. The majority of survey respondents are aware of this issue—56 percent think that digitization of government will create a service gap for those without Internet access or for citizens who have not yet embraced digital interactions. Governments have a lot of work to do here. Digital government must be about fostering greater inclusion with programs that go beyond implementation to account for driving lasting adoption among target audiences with unique demographic profiles.
- **Knowledge is power.** Many governments have understandably moved toward digital government as a means to work more efficiently and effectively. Clearly, this is a fundamental benefit. However, governments should not lose sight of the fact that the best digital programs give citizens what they want. The more that governments understand their citizens' needs, preferences and intent, the more relevant their digital programs will be. This includes strong communications efforts focused on educating citizens about the availability of and how to access these services. And because digital services create a citizen footprint in a way that isn't possible with traditional services, governments can create a virtuous circle in which direct citizen insight informs and enhances continuous improvements in government IT programs and enables better service design and delivery.
- **Create one door.** From the old days of e-government's infancy, agencies have made various inroads in breaking down organizational and process silos to better integrate citizen service, and technology has played a large role in facilitating this. As digital programs mature, it will continue to be important to create consistent "one-stop-shopping" service experiences for citizens that leverage automation, customization and customer-insight analytics.
- **Build on trust.** While data ownership and security are clearly points of concern among citizens that must be addressed, there is a silver lining to consider. The majority of respondents want to conduct all of their government business via digital channels in the future. A significant number are already comfortable with the idea of making future payments via e-mail, Internet and mobile channels, indicating there is a foundation of trust to build on. Survey data also indicate that there may be larger trust capital among younger people, and governments have new opportunities to consider how to maintain this relationship as people age and their interactions with government become more complex.

Beyond the digital citizen

While the citizen perceptions detailed in this pulse survey are important to rethinking government operations, it is also important to remember that the evolution of digital government is not solely about meeting citizen expectations.

For many governments, the driving imperative for digital government rests in a critical effort to cut costs, often dramatically, while delivering services. For these governments, the digital citizen agenda is more about service enhancement than it is a primary focus—at least for now. While governments from local to national levels are in a unique place on their digital government journey, digital government is fundamental to the next generation of government operations.

About Accenture Digital Citizen Pulse Survey Methodology

To better understand the trends and perceptions around the digital interactions between citizens and government, Accenture surveyed more than 1,400 people (the majority of whom were ages 18 to 45) in an online survey conducted from November 29 to November 30, 2011. Respondents included people living in urban, suburban and rural areas in Australia, France, Germany, India, Singapore, the United Kingdom and the United States. Accenture will continue to develop additional research insights related to the rise of the digital citizen.

About Accenture

Accenture is a global management consulting, technology services and outsourcing company, with more than 244,000 people serving clients in more than 120 countries. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world's most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. The company generated net revenues of US \$25.5 billion for the fiscal year ended Aug. 31, 2011.