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Accenture Public Service Pulse Survey

**Digital government:
"Good enough for
government" is not
good enough**

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As commercial digital experiences continue to improve, the bar for government keeps getting higher. The gap between what citizens experience in their lives and what they will accept for government is closing—fast. How can government get ahead of the curve?

New Accenture research points to the importance of government's "Digital Super-Users," those citizens who use their computer or mobile device multiple times every day. By understanding their habits, preferences and expectations, government can build a foundation to succeed in the not-so-distant future—when every citizen will be a Digital Super-User.





Goodbye to the gap

In the past, citizens held government and commercial organizations to different digital standards—expecting less of government than of banks, retailers, airlines and other providers. New Accenture research reveals that this digital gap is nearly gone.

In 2014, an Accenture Public Services Pulse Survey found that 73 percent of citizens expected the same or higher quality from government digital services as from commercial organizations. In the most recent survey—just two years later—that number surged to 85 percent. The findings suggest that the idea of a digital experience that's "good enough for government" will soon be a thing of the past.

When Accenture surveyed citizens in 2014, they told us they wanted the "basics" from digital government: having questions answered definitively (91 percent) and being assured of privacy (88 percent). In the most recent study, those factors remain important to citizens (68 percent and 72 percent, respectively). But the value of advanced functionality has jumped significantly. Citizens increasingly want a personalized digital experience (54 percent), access to user tips and comments (47 percent), smartphone access (44 percent) and integration with social media (47 percent).

Chalk it up to what Accenture calls "liquid expectations," with demand for a positive service experience permeating every aspect of life. In the face of these higher, more complex expectations, government needs to catch up—fast.



Meet the Digital Super-Users

The Accenture Public Services Pulse Survey identified Digital Super-Users as a crucial—and growing—segment of citizens. Representing 23 percent of the study population, these are citizens who say they use their computer or mobile device multiple times every day for a variety of activities, including shopping, booking travel and managing their finances. These citizens are also heavy users of social media and mobile apps.

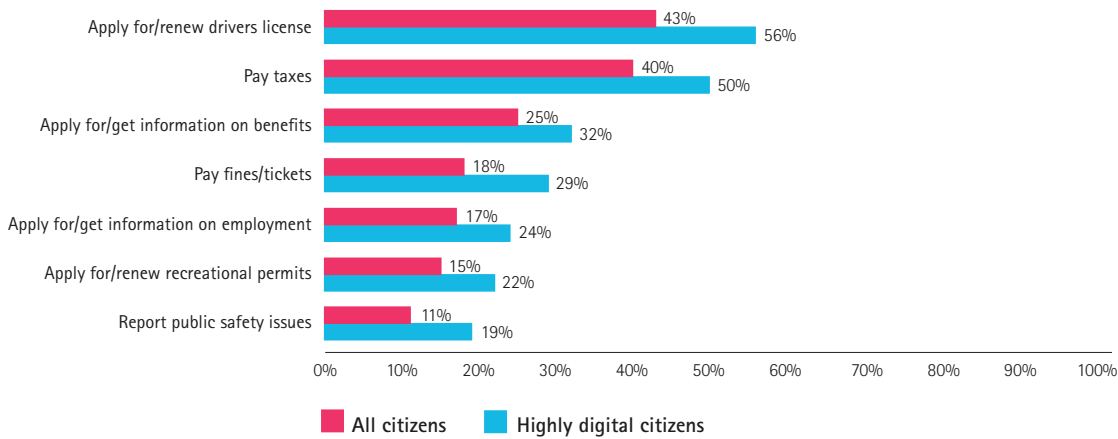
Digital Super-Users opt for email, websites, texting, smartphone apps or social media rather than engaging with government in person via phone or regular mail. And they are more likely to expect a better-than-commercial digital government experience.

What can government learn from Digital Super-Users?

Want to know what citizens of the future will expect, what they will value and what will most affect their views of government? For answers, look to the Digital Super-Users of today. Consider these citizens "leading indicators" for digital government—giving clear signals on how to prioritize and plan investments.

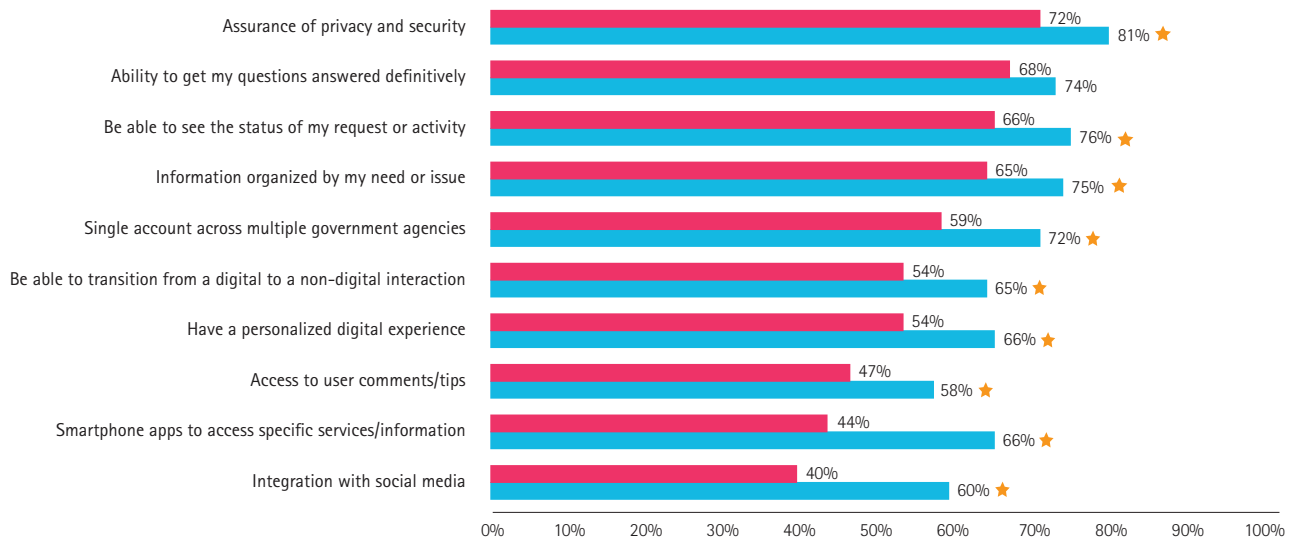
Digital Super-Users are likelier to use certain government digital services.

Activities attempted on city or state government websites in the past 12 months



Digital Super-Users more strongly value full-featured digital services and advanced functionality.

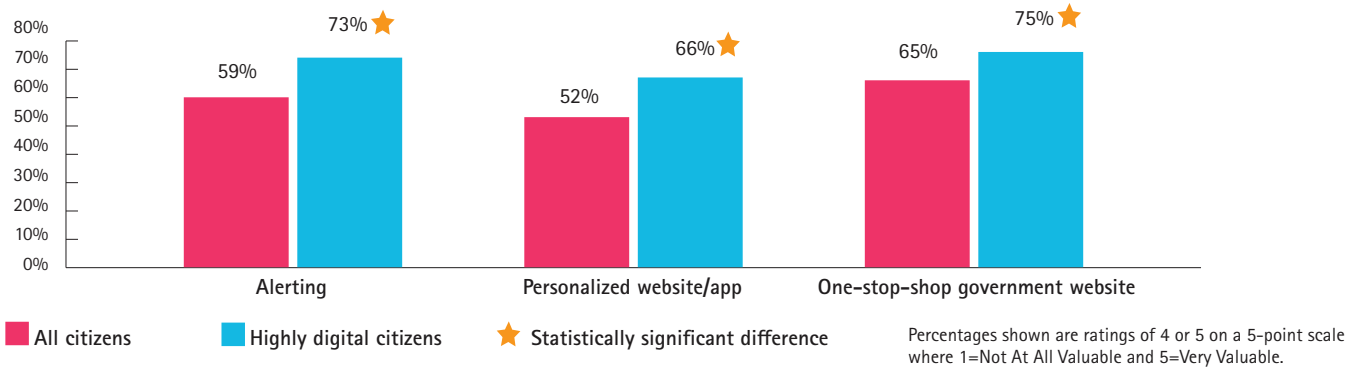
Value of each of the following for creating a positive experience with digital services from government



■ All citizens ■ Highly digital citizens ★ Statistically significant difference

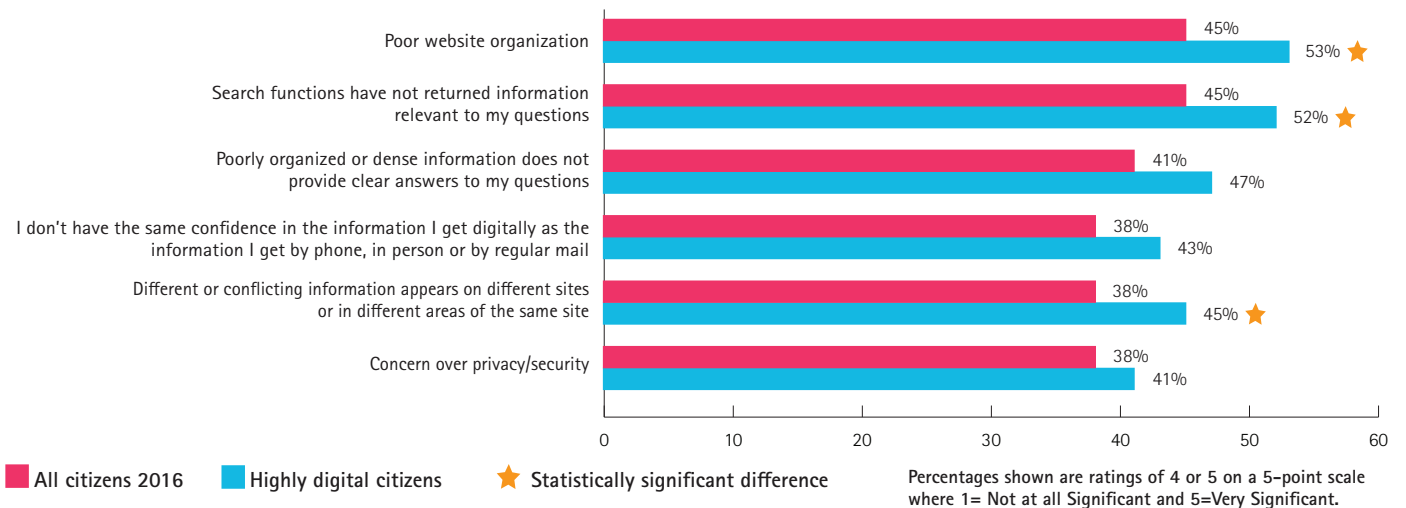
Percentages shown are ratings of 4 or 5 on a 5-point scale where 1=Not At All Valuable/Important and 5=Very Valuable/Important

Digital Super-Users have a more favorable view of advanced functionality.



Digital Super-Users are more frustrated and dissatisfied when government websites and content aren't user friendly.

Most significant obstacles when using digital services from government:





Leaders know they need to do something. Why aren't they doing it?

In addition to the Public Services Pulse Survey, Accenture gathered insights from our panel of public service leaders. Presented with 10 best-practice strategies for delivering digital functionality to citizens, one-half to two-thirds said they consider each of these strategies effective:

- Establishing data-sharing agreements across departments (69 percent)
- Creating a team focused on user experience (69 percent)
- Providing a single sign-on to multiple service (68 percent)
- Establishing customer experience guidelines/governance structures (65 percent)
- Creating a team focused on web/mobile app development (64 percent)
- Creating a dedicated analytics team (63 percent)
- Creating a single point of contact for citizens (58 percent)
- Reforming procurement to make it easier to collaborate with private sector digital specialists (55 percent)
- Investing in mobile apps that meet citizen needs (53 percent)
- Creating a team for digital applications, separate from the traditional IT department (49 percent)

Yet, implementation plans for these strategies lag behind the level of support. One-third to half of leaders say their organizations won't be implementing these best-practice strategies within three to five years or the foreseeable future.

About one-third (36 percent) cited lack of vision as the obstacle to implementation. But most barriers are related to execution—including lack of in-house talent (61 percent), inability to make the business case (61 percent), technology limitations (53 percent) and lack of resources to drive change (53 percent).

Bigger, Better Impact

Improved government digital services would have even greater positive impact on Digital Super-Users' views toward government:

- Overall satisfaction with government (84%)
- Belief that government is forward looking (80%)
- Willingness to engage with government (79%)
- Belief that government is efficient and effective (78%)
- Confidence and trust in government (75%)



Remember: It's not the technology. It's the experience!

Digital Super-Users' behaviors and preferences reflect the digital experiences they enjoy from providers in multiple industries: personalized content and product recommendations, one-click ordering and customer service that moves seamlessly from smartphone to laptop and back.

Rather than assuming that such functionality isn't relevant to public services, government should study digital superstars in the commercial realm. Emulate what's working by tapping into proven service design techniques to help address citizens' stated and unstated needs. That includes embracing user-centered design principles that put people at the heart of the problem-solving and experience-building process. After all, technology is no longer the central decision or differentiator; it's merely the platform for apps, which deliver the digital experience.

For detailed insights and recommendations, see *Stealing a Page from the Private Sector Digital Playbook*. Above all, government organizations should design digital public services as if public outcomes depend on citizen experience. In a world where Digital Super-Users are quickly becoming the norm, they do!

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The "state" of digital

Accenture's Public Service Pulse Survey revealed some noteworthy nuances in these states.

When it comes to government, most Ohioans are analog. In the Buckeye State, a majority of citizens do not use digital to interact with state government. In fact, more than half report using digital for less than 25 percent of their government interactions.

Californians have clear priorities. Citizens of California value assurances of data privacy and security (69 percent) and their ability to have questions answered definitively and accurately (65 percent). They view these features as key to a positive customer experience.

New Yorkers are highly digital. Eighty-seven percent of citizens in New York State use a computer or mobile device at least once a day for shopping, booking travel, conducting financial transactions, checking online reviews or reading online content—and that's true even among those over 65. Nearly 60 percent do so multiple times a day.

Personalization is a priority in the Lone Star State. More than half (58 percent) of Texas citizens feel that personalization of websites and mobile applications would be valuable. That preference is particularly strong among highly digital citizens.

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To learn more about the Accenture Public Service Pulse Survey or Accenture's offerings for state, local and federal government visit:
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