Deloitte.

Making digital default
Understanding citizen attitudes

Citizens in the UK are open to engaging more with the public sector online. But government needs to build trust and offer online services so well-designed that people opt to use them if it is to realise its 'digital by default' ambitions.

This report shares four key insights from new YouGov research, commissioned by Deloitte, into public attitudes towards government's digital services.

Key insights

The majority of citizens are open to online government services. Most have already used an existing online facility and 88 per cent are explicitly open to engaging with the public sector online.

Citizens have an unfulfilled desire to do more online. There is an aspiration gap between people's level of past online activity and their willingness to go online in the future.

Government needs to build trust if citizens are to go digital. Security is cited in our survey as the most important feature of any online service, yet one third of respondents said that they fear the government would misuse their data.

Online services need to be designed so well that people opt to use them. People told us that they want the government to provide online services that are safe, simple, informative and worth using to save time and money. They also told us that wider support – and especially clear instructions – was important to get them online.

April 2014

Thinking people.

Introduction

As government pursues a 'digital by default' strategy, understanding citizen attitudes is a vital step towards delivering an online experience that the public will accept and adopt.

This report sets out four key insights from Deloitte, based on an exclusive YouGov survey into how the public react to government's digital services and their appetite for accessing more online.

Our research found that citizens in the UK are keen to conduct more of their engagement with the public sector online, but government needs to build trust and offer online services so well-designed that people opt to use them if it is to realise its 'digital by default' ambitions.

About this research

Deloitte commissioned YouGov to survey the UK public to understand their attitudes towards digital services provided by government. YouGov conducted an online survey in October 2013 to which 5,180 UK adults responded. The data has been weighted to be representative of the UK population by gender, age and social grade.

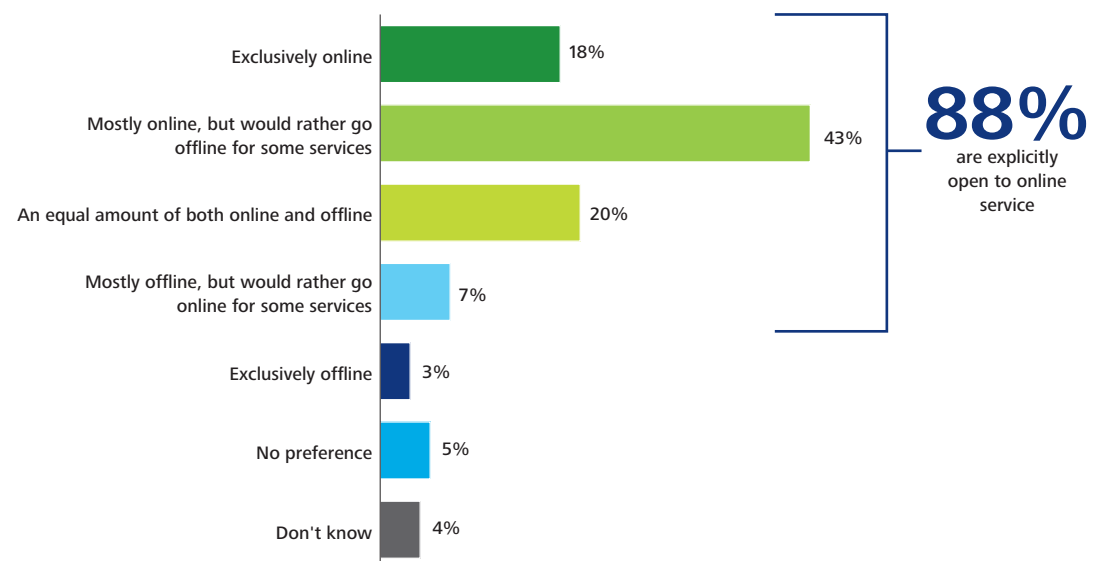### Key insight: The majority of citizens are open to online services

Government online services are already popular. Some 78 per cent of respondents to our survey said they had already used an existing service, ranging from student finance applications to the online crime map.

As figure 1 shows, the overwhelming majority of people – an encouraging 88 per cent – told us that they are explicitly open to accessing government services online.

Just three per cent of respondents said that they preferred exclusively offline access. However, almost one third (31 per cent) of people who prefer more traditional forms of communication told us that nothing would encourage them to go online, as shown in figure 6.

So while alternative access methods are still needed to ensure equality of access, our survey shows that the majority of citizens are already open to online government services.

Figure 1. Preferred ways to access government services

Exclusively online — 18%
Mostly online, but would rather go offline for some services — 43%
An equal amount of both online and offline — 20%
Mostly offline, but would rather go online for some services — 7%
Exclusively offline — 3%
No preference — 5%
Don't know — 4%

88% are explicitly open to online service

Our survey shows that citizens have a strong appetite to do more of their engagement with government online. This is particularly true among people who already access some online services.

For example, while 20 per cent of respondents have previously booked an appointment online with the public sector, some 46 per cent told us that they would prefer to book appointments online in the future.

As figures 2a and 2b show, there is a significant gap between people's historic use of online access and their preferences for the future. Citizens are clearly willing to engage with the public sector online more in the future than they have in the past.

This aspiration gap between past behaviour and future preference suggests an unfulfilled desire to do more online.

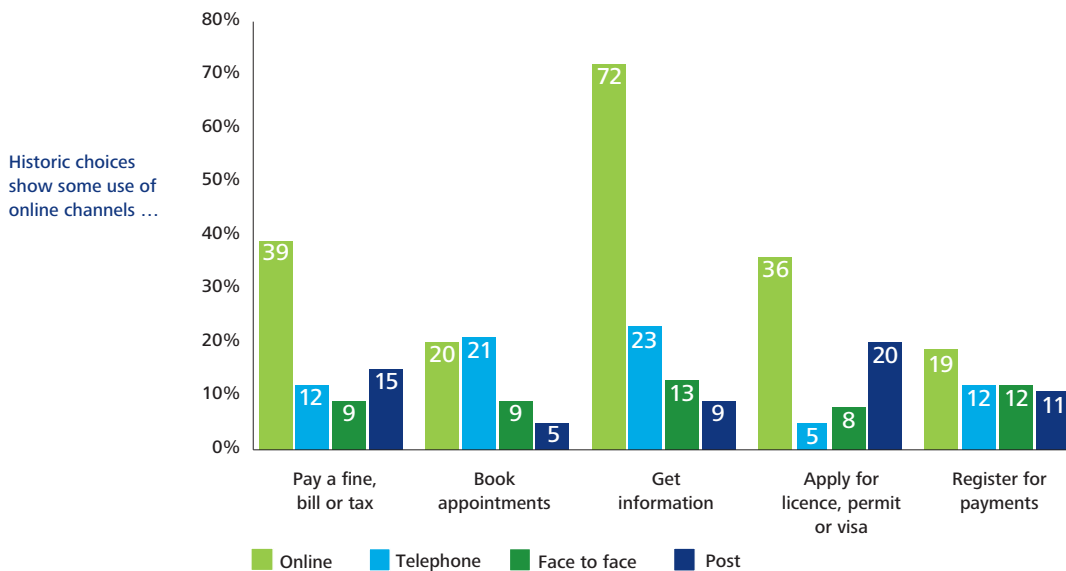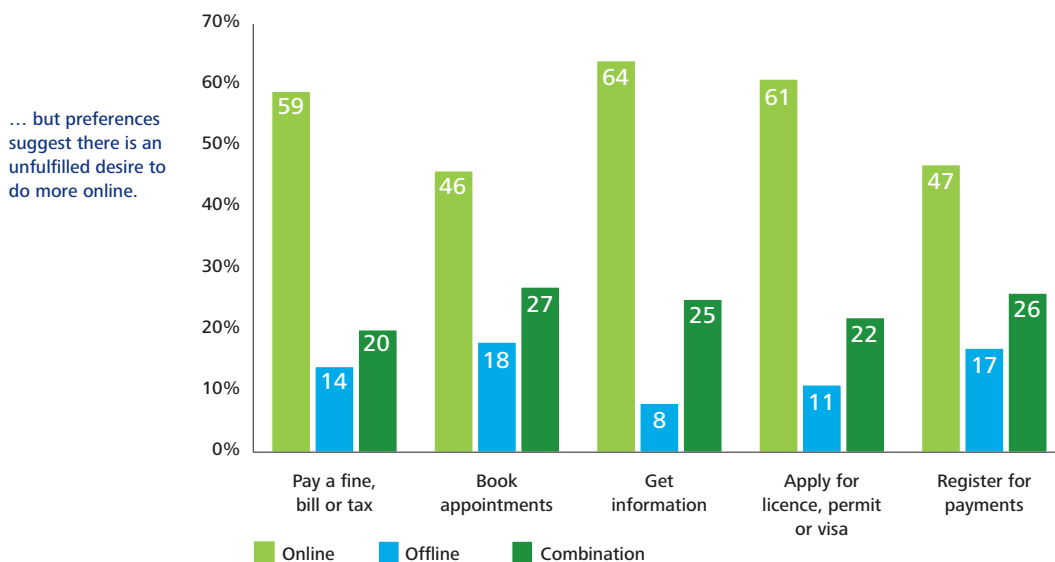**Figure 2a. Access methods that people have previously used**

Historic choices show some use of online channels …

	Pay a fine, bill or tax	Book appointments	Get information	Apply for licence, permit or visa	Register for payments
Online	39	20	72	36	19
Telephone	12	21	23	5	12
Face to face	9	9	13	8	12
Post	15	5	9	20	11

Figure 2b. Access methods that people want to use in future

… but preferences suggest there is an unfulfilled desire to do more online.

	Pay a fine, bill or tax	Book appointments	Get information	Apply for licence, permit or visa	Register for payments
Online	59	46	64	61	47
Offline	14	18	8	11	17
Combination	20	27	25	22	26

Key insight: Government needs to build trust if citizens are to go digital

Government needs to assure the public that it can keep their data secure, will not misuse it and is capable of digital delivery. At present, trust in government is a major barrier to the adoption of online services.

Some 17 per cent of respondents to our survey said that they avoid digital interaction because they do not want to share data online. Of the people who persistently say that they prefer offline access, that figure rises to 42 per cent.

Our survey explored these concerns further by asking what people thought would happen if government departments shared their data. As figure 3 shows, just 18 per cent said they expected data sharing would help improve services and 33 per cent said they thought the data would be misused. As figure 4 shows, levels of trust correlate to age and social grade. In other words, people who are younger or more affluent tend to trust more in government's ability to keep their data secure.

Trust in government in relation to all IT matters is low. Just nine per cent of respondents said they had confidence in the government's ability to deliver IT projects on time and just six per cent think they can deliver on budget.

Building trust – particularly among older and less affluent groups – in government's ability to deliver digital services and keep the public's data secure is therefore a significant challenge in the move towards digital by default.
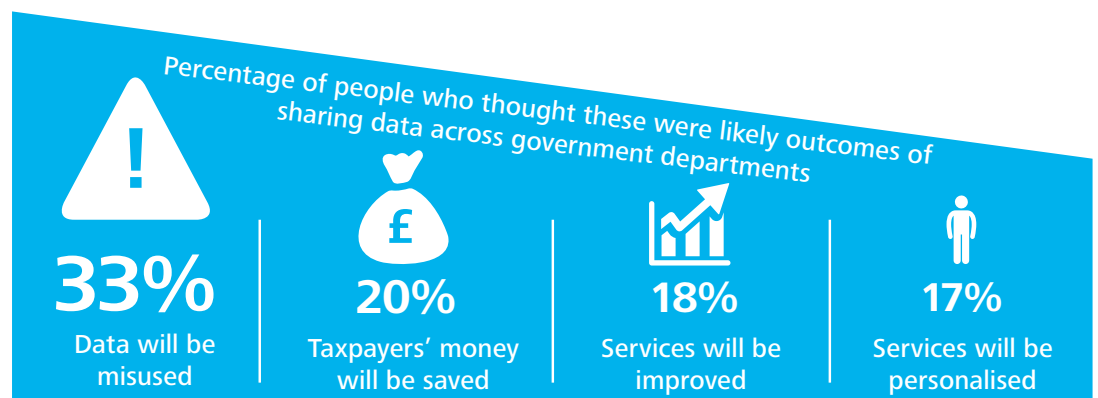
Figure 3.

Percentage of people who thought these were likely outcomes of sharing data across government departments

33% Data will be misused

20% Taxpayers' money will be saved

18% Services will be improved

17% Services will be personalised

Figure 4. Likely outcomes of sharing data by age and social grade

— Improve public services — Save taxpayer money — Personalise services — Misused

Mean scores ranked on a scale of one-ten
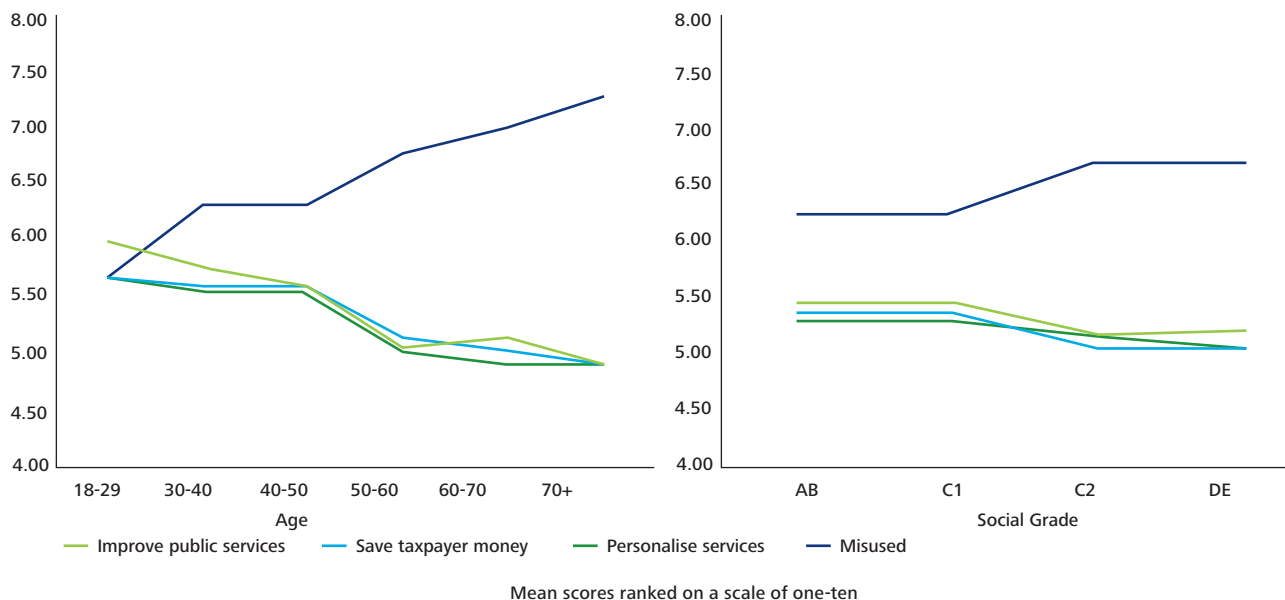
Figure 5. What are the most important features of government online services?

| Strong data security | Simple | Informative | Saves you time | Saves you money | Saves the taxpayer money | Accessible to all | Is as good as best of private sector services | Innovative |
| 75 | 70 | 68 | 68 | 66 | 65 | 65 | 58 | 36 |

Percentage of people who ranked each feature as eight, nine or ten on a scale of one-ten of importance
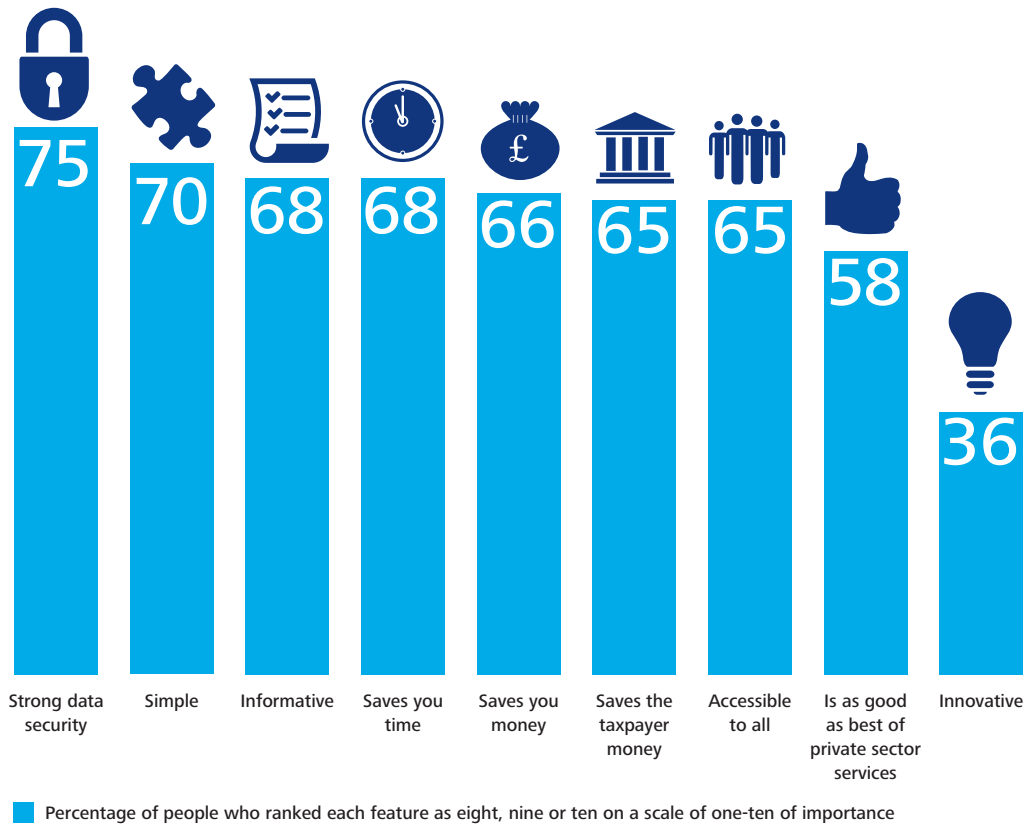
Key insight: Online services need to be designed so well that people opt to use them

Our research shows that people want the government to provide online services that are safe, simple, informative, and save their time and money.

Figure 5 shows the features that people told us were the most important to them. After data security, the most valued features relate to usability. Citizens clearly want services that are straightforward to use, and are worth using to save time and money.

This chart also shows how the public don't value 'innovation' as a concept in itself, but they do value the outcome of innovation when it becomes manifest as well-designed online processes.

Figure 6 shows the kinds of support that would encourage people to access online services. One factor – clear instructions – would encourage 42 per cent of people to use online services. Even 41 per cent of people who prefer offline access methods would be encouraged to use online services by clear instructions designed for the first time user. Overall, just 32 per cent of those surveyed said that support would not make them more likely to use online services. In other words, online and offline support could significantly improve the adoption of online access to government services.

Our research therefore finds that online services that are intuitive and made easy for anyone to use are more likely to be successfully adopted. Government needs to provide online services that are so well designed, and with support available, that people will opt to go online rather than use offline alternatives.

Figure 6. Types of support that would help or encourage adoption of online services

	All respondents	People who prefer offline access
Face-to-face advice (e.g. at a Post Office)	14	24
Tutorials in local public places (e.g. a library)	6	9
Clearer instructions online, designed for first time users	42	41
Increased potential to save time or money	44	26
Improved data security	32	28
Telephone helplines	18	21
Other	5	4
Nothing would encourage/help me to use online goverment services	20	31

Making digital default: five policy actions

Our research aims to provide constructive practical insight for digital strategists across UK government and the public sector. But the survey also points to five suggested policy actions:

Express an explicit mandate for digital investment – Our survey shows that citizens value and welcome a move to greater online interaction with government. All parts of the public sector can react to that by building their investment in digital services, and a clear mandate expressed by public sector leaders would be welcome. Local politicians and public sector non-executives in particular should confirm their commitment to digital by default by expressing an explicit mandate for investment.

Signpost and incentivise online services to drive adoption – Awareness is crucial in order to build adoption of online services. Government should ensure that all existing online services are signposted throughout traditional and hard copy processes. Incentives and behaviour change techniques should also be used. In some circumstances, the public sector could adapt the routine private sector approach of offering discounts for online-only service such as paperless billing and Direct Debit.

Provide online guarantees to build trust – Our research shows that trust is a decisive factor in the adoption of online services. For online shopping facilities such as eBay, buyer protection guarantees help build trust. Similar guarantees could be extended to public sector online services by offering priority redress for any errors that arise from mishandled online interaction where the public sector is at fault.

Design around the citizen to make online the most compelling choice – To drive adoption of online services, the public sector needs to prioritise user experience in their design so that citizens make a rational and active choice to go online. Services need to be intuitive for regular users but also designed for first time users, with instructions and offline support.

Redesign processes as end-to-end digital – Many online services provide a digital interface for essentially traditional processes. For example, web forms are sometimes used to capture information that is ultimately managed by a public sector employee. But digital's best potential is in the fundamental redesign of processes so that digital technology is exploited at every step.

Conclusion

This research provides insight for digital strategists across government and the public sector.

Our findings show that the majority of UK citizens have experienced government services online and have an appetite to do more of their public sector interaction in this way. That is a clear validation of the government's 'digital by default' approach. But our research also shows significant levels of concern over government's ability to keep citizen data safe and deliver IT projects successfully. That is a clear challenge for government to promote its online achievements, mitigate against risks concerning data and build trust in its digital ability.

This research also points to a set of factors that would make online services a compelling first-choice for citizens. People told us that they wanted services that are easy to use and that support, including instructions, would be vital to drive their adoption. The tipping point for adoption of online access is therefore whether services are so intuitive to use, at least with guidance, that citizens make a deliberate choice to use them.

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