

Research Brief

DIGITAL ACCESS IN GOVERNMENT

WHAT 2,000 CITIZENS SAY ABOUT
ONLINE GOVERNMENT SERVICES



SUMMARY

Booz Allen launched a public survey to 2,000 participants to understand citizen sentiments on government digital services and how those sentiments have evolved in light of COVID-19. The findings highlight key opportunities for federal agencies as they carry out ambitious digital transformation agendas this year.

The research brief includes:



COMPARISON OF SERVICES

Which services are most preferred for digital government interactions

KEY BARRIERS TO DIGITAL ACCESS

What respondents have to say about perception and trust of digital government

THE IMPACT OF COVID-19

How behaviors and preferences have changed in response to the pandemic

DEMOGRAPHICS TO ENGAGE

Which population segments are less engaged with online services

A DIGITAL FUTURE

What respondents say about the concept of a digital profile in the future

COMPARISON OF SERVICES

Not All Service Is Equal Online

There is more comfort accessing government services online with tasks that are routine and familiar to them, such as filing for student financial aid, responding to the census or paying for their taxes. When it comes to activities that are performed less frequently, such as getting help with housing or a natural disaster, respondents don't have as strong a preference for conducting these activities online.

Please indicate what would be your preferred way of accessing the following government services. *Showing on the Internet



Methodology

- This poll was conducted with Morning Consult in December 2020.
- Data were collected among a total national sample of 2,000 U.S. adults aged 24 or older.
- The interviews were conducted online using a panel of adults.
- The data were weighted to approximate a target sample of adults based on age, gender, educational attainment, and region.

KEY BARRIERS TO DIGITAL ACCESS

Perception of Digital Government Services

Respondents are not convinced services will be better or faster online—when compared to services in person, on the phone, or by mail. And when comparing digital government to other institutions, 62% of participants stated that they trust financial and healthcare institutions more than government organizations to keep their personal information private.

Thinking about why you would prefer not to access certain government services from the Internet, please indicate whether you agree or disagree with the following statement: “I think accessing services in person, on the phone, or by mail is faster.”

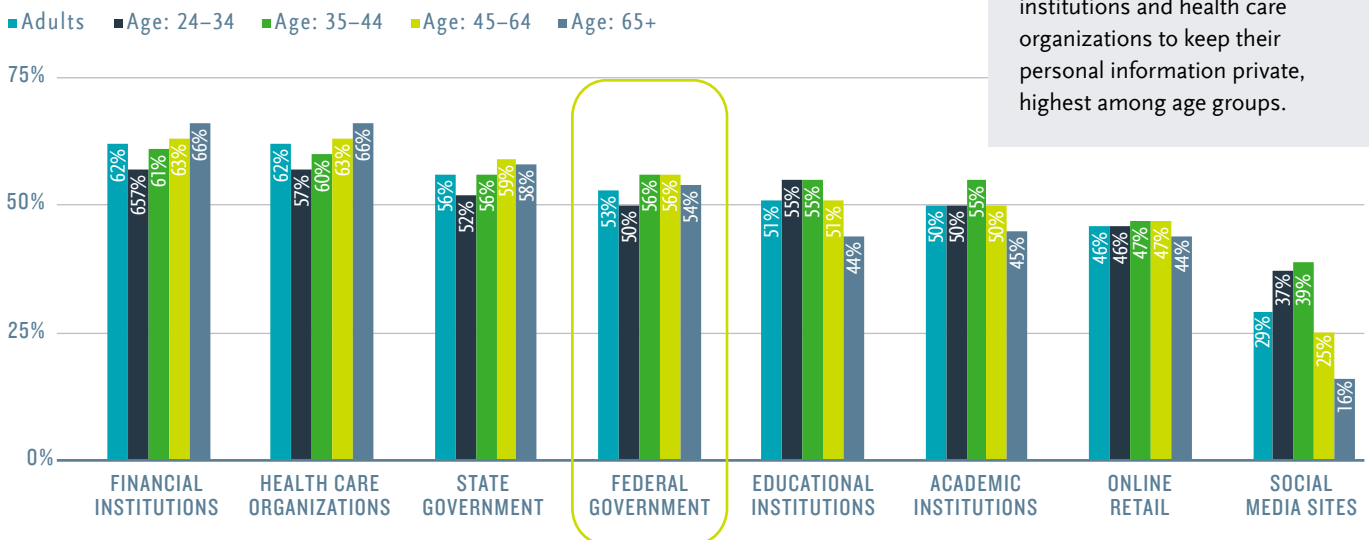


“The future is digitizing your services. The future is trust in online interactions between government and citizens. More work needs to be done to realize that transformation.”
—Julie McPherson, Digital Business Lead at Booz Allen



Six in ten (61%) adults agree that accessing services in person, on the phone, or by mail is faster than accessing from the Internet.

How much do you trust the following institutions to keep your personal information private when you use their digital services? *Showing A Lot and Some



Two thirds (66%) of respondents ages 65+ trust both financial institutions and health care organizations to keep their personal information private, highest among age groups.

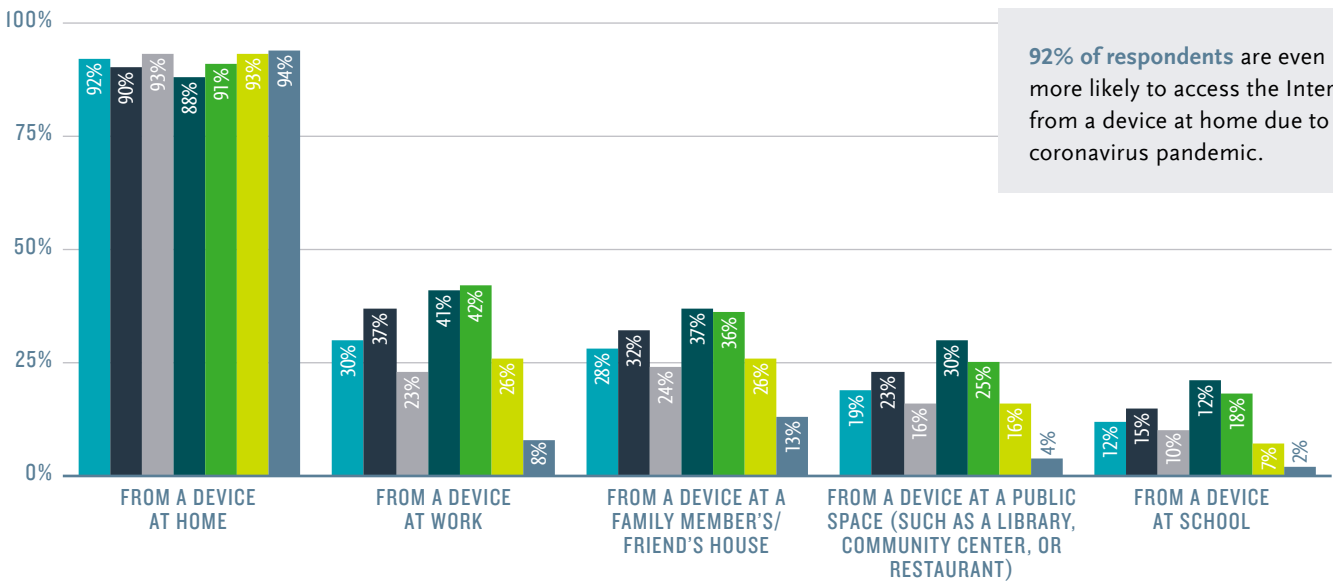
THE IMPACT OF COVID-19

Digital Access During COVID-19

Digital platforms have become even more critical to access government services during the pandemic, allowing the government to provide critical services in unprecedented times. It's no surprise that over the past year, preferences changed for many Americans as day-to-day interactions became digital to preserve safety and health.

Based on what you know about how the coronavirus pandemic has impacted you and your community, please indicate if you are more or less likely to access the Internet at each of the following places. *Showing Total More Likely

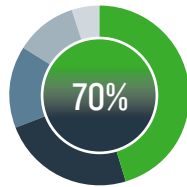
■ Adults ■ Male ■ Female ■ Age: 24-34 ■ Age: 35-44 ■ Age: 45-64 ■ Age: 65+



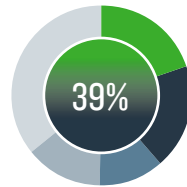
92% of respondents are even more likely to access the Internet from a device at home due to the coronavirus pandemic.

Please indicate how much each of the following has caused your preference for accessing federal government services through the Internet to change due to Covid-19.

*Showing A Lot or Some

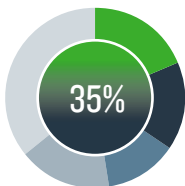


CONCERNED ABOUT GETTING SICK

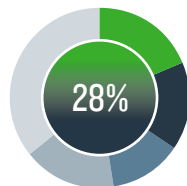


HOURS IN THE OFFICE ARE MORE LIMITED

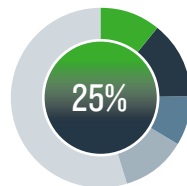
Seven in ten adults said concern about getting sick caused their preference for accessing government services through the Internet to change by a lot or some.



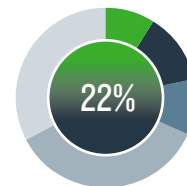
UNABLE TO GO TO PUBLIC SPACES WHERE FREE INTERNET IS OFFERED



UNABLE TO TAKE PUBLIC TRANSPORTATION



CHILDCARE ISSUES AFFECT WHERE I CAN GO AND WHEN



LIMITED ACCESS TO DEVICES AT HOME

■ A Lot ■ Some ■ Just a Little ■ Not at All ■ This Doesn't Apply to Me

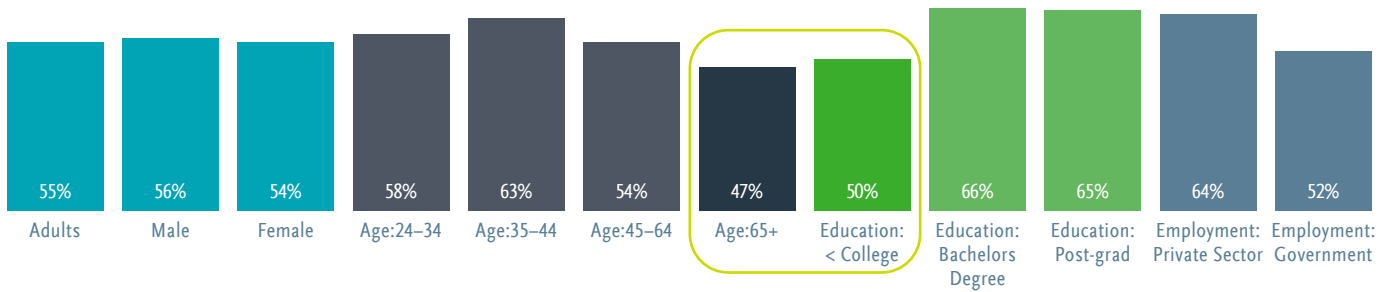
DEMOGRAPHICS TO ENGAGE

How Demographics Impact Online Preferences

We asked people how they would get information, access, or apply for government services on the internet. Certain demographics, like the 35-44 age segment, reported a definite preference for online government services. Other demographic groups were less positive. Respondents over the age of 65, along with participants who do not have a college education, were less likely to report that they prefer to use digital government services.

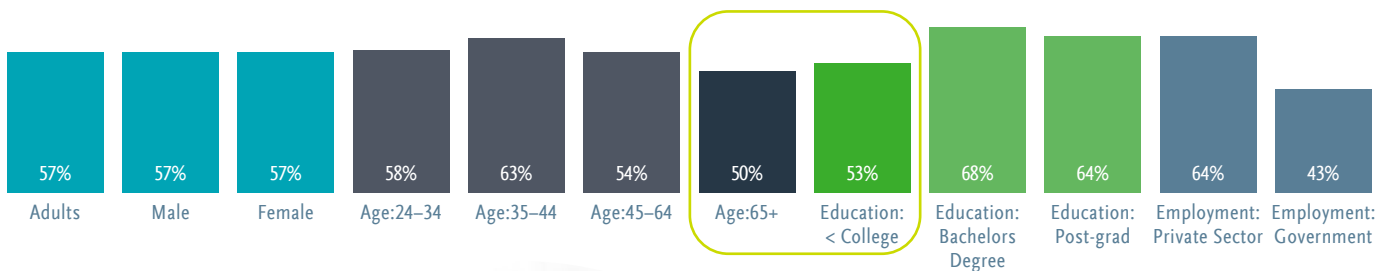


*Thinking about government services, in general, how do you prefer to get information about government services (such as taxes, passport information or social security benefits)? *Showing On the Internet*



Older respondents with lower education levels are less likely to report preferring to access or apply for government services on the internet.

*And in general, how do you prefer to access or apply for government services (such as taxes, passport information or social security benefits)? *Showing On the Internet*



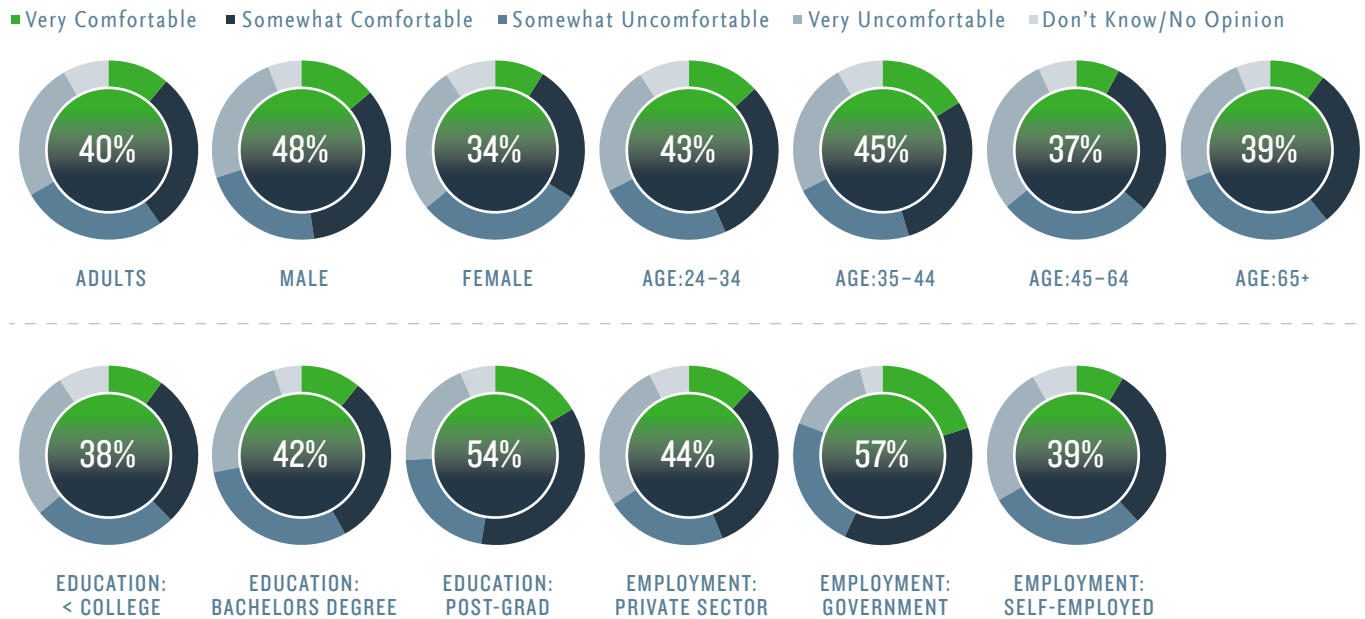
A DIGITAL FUTURE

Citizen Readiness for a Digital Profile

Federal IT leaders are at the vanguard of digital customer experience, creating products that deliver new value with every interaction. And while certain segments continue to prefer non-digital options, other segments are leaning toward a digital-first future. In fact, 40% of the respondents said they would be comfortable with the government eventually keeping a digital profile for them—eliminating the need to input similar information in multiple places and creating a more seamless experience for citizen-government interactions.

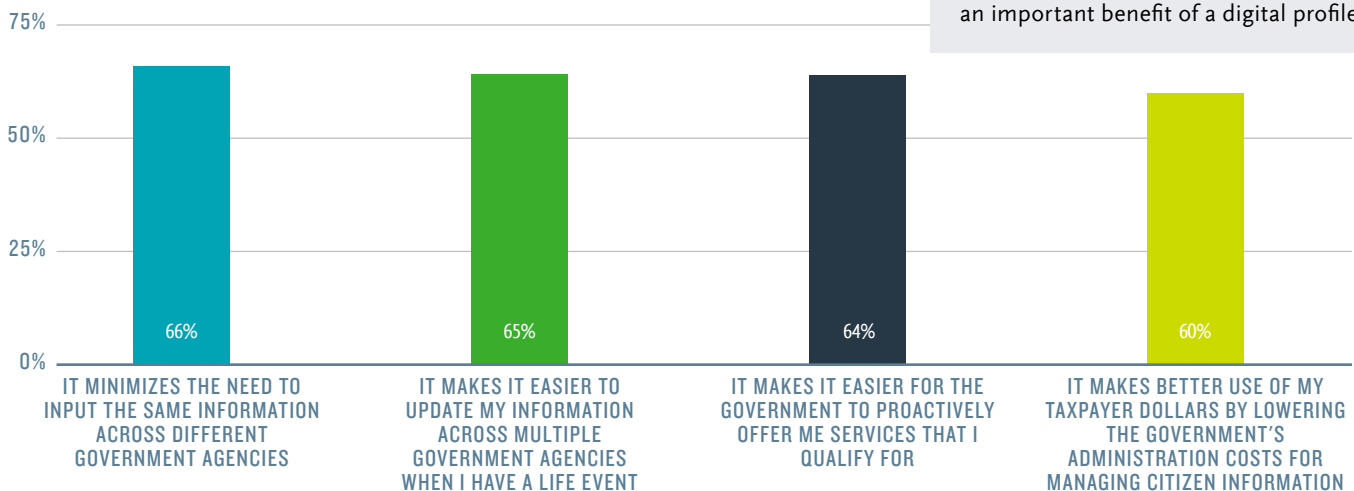


*How comfortable or uncomfortable are you with the federal government keeping a digital profile on you? *Showing Total Comfortable*



*Thinking about the benefits of a digital profile, how important do you think each of the following is? *Showing Very important and Somewhat important*

Two thirds of adults say minimizing the need to input the same information across different government agencies is an important benefit of a digital profile.



About Booz Allen

For more than 100 years, military, government, and business leaders have turned to Booz Allen Hamilton to solve their most complex problems. As a consulting firm with experts in analytics, digital, engineering, and cyber, we help organizations transform. We are a key partner on some of the most innovative programs for governments worldwide and trusted by their most sensitive agencies. We work shoulder to shoulder with clients, using a mission-first approach to choose the right strategy and technology to help them realize their vision. With global headquarters in McLean, Virginia and offices worldwide, our firm employs nearly 27,200 people and had revenue of \$7.5 billion for the 12 months ending March 31, 2020. To learn more, visit BoozAllen.com. (NYSE: BAH)

For more information visit
BoozAllen.com/digital