

## **A blueprint for enhanced citizen experiences**

The case for simple, smart and personalised  
government services

2021

# Foreword

## Adobe

2020 marked a significant turning point in the relationship between Australians and government. As millions of people sought government support to help manage the COVID-19 crisis, departments and agencies across the country stepped up to the task. A focus on meeting Australians' need for reliable, accessible information has strengthened the bond between citizens and government, but there is plenty more to be done.

One of the key findings from the Adobe and Deloitte *A Blueprint for Enhanced Citizen Experiences* report is that Australians now have an overwhelming preference for digital engagement with government. In fact, websites across government have had over one billion visits since the beginning of the pandemic. That's **one billion** reasons to deliver a personalised and relevant digital experience to every citizen coming to government's digital front door.

And while most people trust government websites, one in two Australians still encounter inconsistent information across departments and agencies. This deficit in citizens' digital experiences may help explain why so many Australians are still turning to non-government sources like search engines and family for public information.

Looking at the pathways for government to improve the digital delivery of information and services to citizens, and capitalise on growing public trust into the future, is central to our work with Deloitte Access Economics.

In the report, we closely examine how government can move from a one-size-fits-all approach to serving populations digitally, to delivering the right information at the right time to individual citizens. Beyond driving efficiencies for both parties, this shift to personalisation has the potential to strengthen public service outcomes for Australians and build further trust in government. In fact, there exists potential for the Australian government to become one of the most trusted and innovative in the world. The successful, rapid recovery from the events of 2020 is likely to rely on it.



**Suzanne Steele**  
Vice President,  
Australia and New Zealand (ANZ)  
Adobe

# Foreword

## Deloitte

The COVID-19 pandemic has highlighted the crucial role that government plays in assisting Australians. Since the onset of COVID-19, demand for government information has increased significantly amid a rapidly evolving health emergency and roll-out of support packages designed to help individuals and the economy withstand the crisis.

During this time, digital has become the medium of choice for Australians seeking access to government services and information. And previous research undertaken by Deloitte and Adobe showed that digital transactions can deliver efficiency and cost benefits to citizens and government if delivered effectively.

This *A Blueprint for Enhanced Citizen Experiences* report explores how government can potentially amplify these mutual benefits by improving the 'digital citizen experience'. Substantial progress has already been made on this front; however, many Australians still encounter challenges when interacting with government online.

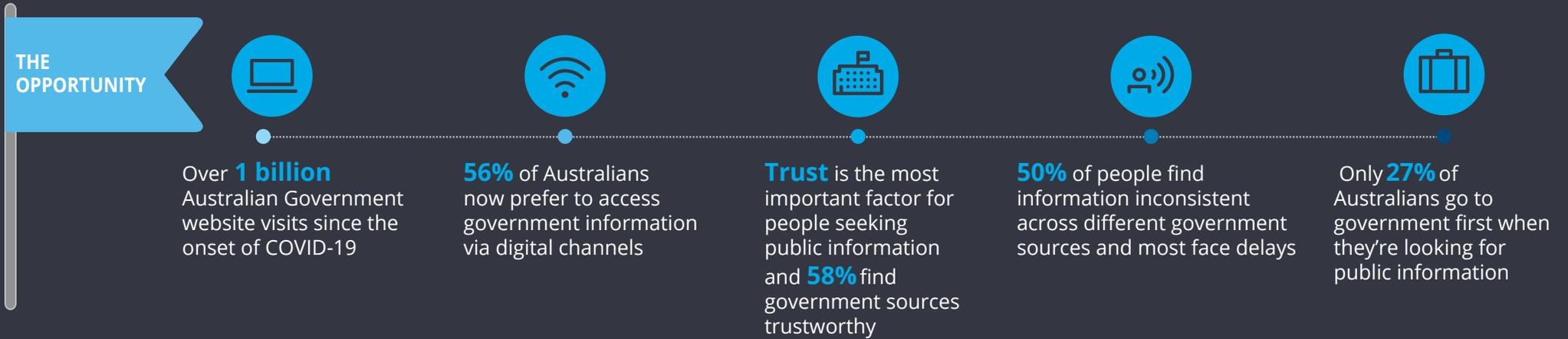
The current focus on the digital economy presents a timely opportunity for government to better meet the needs of its citizens. The next step in the government's digital transformation is to provide each citizen with a more personalised digital experience, directing them to the information they need based on who they are.

The benefits of personalisation are evident. Government can instil greater trust among citizens as they support each one with relevant information, and more efficient delivery of services. Citizens, on the other hand, can feel more assured they will get the outcomes they seek and spend less time doing so. Therein, a compelling value exchange.

We are delighted to once again team up with the Adobe team to drive positive outcomes for both government and all Australian citizens.



**Richard Deutsch**  
Chief Executive Officer,  
Deloitte Australia



### THE SOLUTION

**Personalisation** harnesses the signals that citizens send online to deliver a tailored digital experience based on their individual needs

**3 in 4** Australians say they would be equally or more likely to use government websites if they're personalised

### OVERCOMING CHALLENGES

Delivering personalisation requires an achievable shift in how government operates

FROM	TO
From data privacy concerns	to transparent data collection and use
From cyber security fears	to leveraging trusted platforms
From mass communication	to personalisation at scale
From lack of capabilities	to leveraging in-house and external skills
From complex internal systems	to being integration ready

### THE BENEFITS TO GOVERNMENT AND CITIZENS

- Better uptake** of online government services
- Support citizens** to complete transactions more accurately
- Increased citizen trust** and perception
- Enhanced service delivery** outcomes

# Executive summary

Since the onset of the COVID-19 pandemic, Australian government websites have received over 1 billion visits as the demand for trusted public information and support services significantly increased across the population. At one stage, MyGov alone had 3.2 million logins in a 24-hour period.

While the nature of the public health crisis meant that online access to government services and information was a necessity, it has also now embedded digital as the medium of choice for the majority (56%) of Australians.

To understand this better - what government information individuals access online, what they value and their experiences, preferences and expectations - Dynata and Deloitte Access Economics surveyed 1,000 Australians on behalf of Adobe.

In this uncertain environment, the research shows that trust consistently emerged as the most important factor for Australians seeking public information. Encouragingly, most people already consider government sources to be trustworthy. More broadly, academic research suggests that public trust in government at all levels has grown since the pandemic struck.

While departments and agencies have done well to manage the uplift in demand for digital access, there is room to improve the citizen experience. The survey revealed that more than half of Australians found government information to be inconsistent and 22% said they have to go to more than one source to get the information they need.

In addition, many Australians say they face delays in interacting with the government. Some 75% cite long hold times, and 59% are not sure when they will get the requested information.

As a result, many individuals turn to non-government sources including search engines, friends and family or media. While 70% of Australians have looked for public health updates, only 24% of people access them directly from government.

How then can government be sure the correct messages are consistently getting through to the people who need them most to improve public service outcomes and galvanise elevated trust?

Delivering a more personalised citizen experience has the potential to meet these objectives. That is, using the digital behaviours and context that each citizen provides to tailor the delivery of support and services no matter which department or agency they engage with online. For example, knowing where someone is located, or remembering information to avoid having to enter it twice, across government channels.

Our survey found one third of Australians would be more likely to use government websites if they were better tailored, and four in five are willing to use a personalised service. For government leaders, understanding their citizens' behaviours, their attitudes and frustrations, will help deliver better, more efficient outcomes.

Previous research by Deloitte and Adobe also identified that digital transactions bring down costs and save time for both citizens and government.

The reality is government leaders interviewed for this report aspire to provide great customer service across all mediums. However, many noted they came up against various barriers when it comes to digitising and personalising services.

There were perceived roadblocks around cost, regulation, and security. Yet personalisation does enable time savings for citizens, and time and cost savings for government, producing a better all-round experience. Regulators also generally encourage personalisation given its benefits and the fact that it can also improve security.

Such a triple dividend provides a compelling case for simple, smart and personalised government services and an opportunity for government to bring forward this crucial step in its digital transformation journey.

# This report

A blueprint for enhanced citizen experiences: The case for simple, smart and personalised government services. This edition looks at why citizens and governments stand to benefit from more personalised services.

The first report, 'Digital Government Transformation' considers the economic benefits that can be realised from greater adoption of digital technologies for government transactions, identifying a potential \$17.9 billion in savings over a decade.<sup>1</sup>

The second report, 'Rethinking the digital dividend'<sup>2</sup> made the case for the use of digital experience platforms.

It outlined how governments are yet to realise the benefits of digitisation, and identified that the average Australian spends the equivalent of one working day every year waiting in queues, on hold, or mailing forms to complete government transactions via traditional channels.



Technical expertise and experience working with government sector clients



Public sector expertise, human/citizen centred design approach to delivering relevant, timely and sustainable digital transformation solutions

Understanding of government and the public sector in Australia and around the world

This research follows on from the two reports. It sets out to investigate the potential citizen and government benefits of personalisation. It draws on Australian and global examples, uses case studies and insights from senior government leaders, and incorporates a survey of 1,000 individuals from across Australia.

It contains three sections:

1. government information
2. personalisation
3. government actions and challenges.

## Citizen survey

Deloitte conducted a citizen survey to investigate the benefits and the attitudes to personalisation in government information and services.

The survey was fielded by Dynata in September 2020 to 1,000 Australians aged 18 and older. This sample was nationally representative across ages, genders and locations. It sought to understand:

- what government information people access online, how and why
- experiences with accessing government information from government services
- attitudes and frustrations when using government services online
- views regarding personalisation of government services.



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# Government information

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# Government information in daily life

GOVERNMENT INFORMATION

GOVERNMENT PROVIDES CRUCIAL INFORMATION AND A RANGE OF SERVICES BEYOND TRANSACTIONS.

Almost 9 in 10 Australians seek government information at some point. Beyond transactions, the government offers an important public service by providing information. People access this information on average, twice a year.<sup>3</sup> Recent bushfires and the COVID-19 pandemic have both illustrated and increased that rate. At an extreme, government information can save lives.

PERSONALISATION

## Government payments

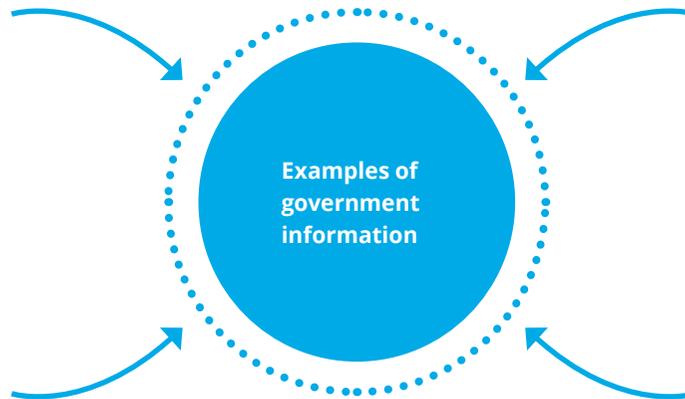
74% have sought information about, or requested, government payments (e.g. Medicare rebates, JobSeeker).

## Education and schools

65% have found information about education institutions (e.g. school holidays, childcare).

## Work rights

67% have looked for information about employment such as rights at work or superannuation.



## Tax

84% have accessed tax information (e.g. what's deductible, filing a tax return).

## Education and schools

70% have accessed public health updates or looked for COVID-19 testing centers.

## Registrations

89% have registered a car, or renewed a car, boat or other license.

## Plus so much more...

- Comparison tools (e.g. FuelCheck, Energy Switch)
- Financial information (e.g. MoneySmart service)
- Public registers (e.g. of doctors, lawyers)
- Emergency information (e.g. bushfire preparation plans, updates)

GOVERNMENT ACTIONS AND CHALLENGES



Citizens are engaging with government information more than ever.

**9/10**

have looked for government information at some point.

**188m**

visits to government websites in July 2020 alone.<sup>4</sup>

**1.7b**

visits to Australian government websites since the COVID-19 crisis started.

# Where people look

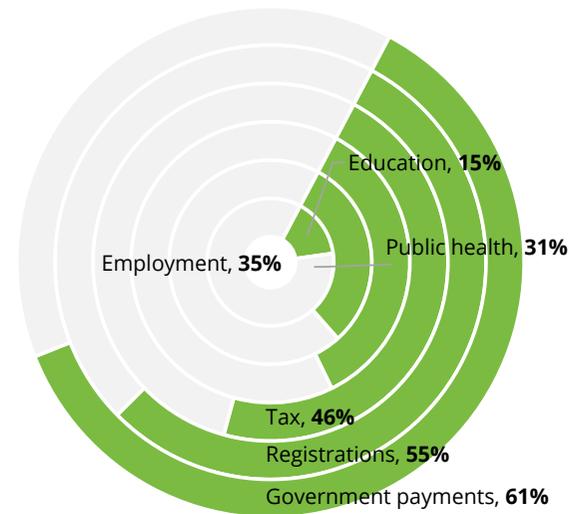
WHILE GOVERNMENT GENERATES PUBLIC INFORMATION, PEOPLE CHOOSE TO ACCESS IT FROM A RANGE OF SOURCES.

Australians aged 15 and over transact with government on average more than once a week. This includes filing a tax return, paying a fine, or claiming a Medicare rebate. Most people see these transactional touchpoints as the primary way they interact with government.

Government is primarily responsible for creating 'public information'. This can include information relating to transactions – for example, changes in tax brackets or hospital locations. However, it can also include more general information such as school holiday dates, public health updates, and employment rights.

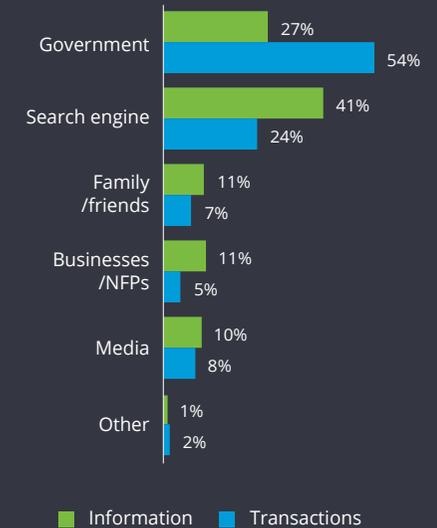
**Citizens are most likely to go directly to government for transactions. However, people tend to use other sources to find public information.**

While government may generate both general and specific information, citizens may choose to access it from other sources. For example, 15% of people use private businesses or other institutions to get tax advice. 20% use the media to get public health updates.<sup>3</sup>



Survey question: what source do you go to first when looking for the following types of public information and services?<sup>3</sup>

## Where citizens go to look for public information or conduct government transactions.



Survey question: what source do you go to first when looking for the following types of public information and services? Aggregated.<sup>3</sup>

'Transactions' are classified as tax, benefits and registrations. 'Information' is classified as public health, education and employment rights.

# Citizens prefer digital

Citizens can access government information through a variety of sources, either in-person, on the phone, via government websites or through broadcast television or radio.

## The majority of respondents prefer to access government information via digital channels.<sup>3</sup>

Almost three in five (**56%**) selected websites as their preferred medium. This is almost **five times** as many as the next most preferred medium—in-person (11%).

The preference towards government websites is consistent across all age groups, genders and regional and metropolitan respondents.

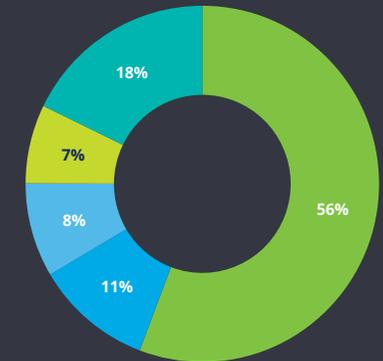
In contrast, the preference for information sourced in-person varies more significantly across different demographic groups, reflecting specific needs or differences in access.

For example, elderly respondents (aged 65 years and over) and regional respondents were more likely to prefer in-person sources for their information. It ranked first by 18% and 17% of respondents respectively.

In contrast, just 5% of respondents aged 35-44 preferred in-person sources of information. This is less than half the average.

Similarly, the preference towards social media also varied. For Aboriginal and Torres Strait Islander Australians, social media (21%) was their second most preferred medium behind websites.

## Top ranked medium to access government information.



Survey question: what source do you go to first when looking for the following types of public information and services?<sup>3</sup>

# Why people get government information from non-government sources

People are able to seek the information they require from a range of sources. Provided the information is accurate, attaining government information from non-government sources is not always a bad thing. These sources may be more readily available, or they may provide people with information in a way that is easier to understand.

**But when people do seek information from government sources, many report experiencing a range of frustrations.**

Long hold times (75% of respondents) were the most frequently reported frustrations, followed by uncertainty around how long it will take to satisfy a request for information (59%) and that there are too many passwords to remember (53%). In addition, one third of respondents identified concerns around how their data is used or might be used on government websites.<sup>3</sup>

These complaints mirror those received by government departments. In 2018-19, Centrelink recorded more than 250,000 complaints and Medicare more than 9,500.<sup>5</sup>

For both departments, the most common complaint related to waiting too long and not being updated on the progress of a claim or application—40% of complaints for Centrelink and 29% for Medicare.<sup>5</sup>

For Centrelink, individuals also complained about difficulties with phone services, including call wait times (10%). For Medicare, individuals were more likely to cite frustrations with digital services (15%), including the inability to access digital services, or information being incorrect or unclear.<sup>5</sup>

**Understanding common frustrations among users is the first step to improving the citizen experience. Even small changes could help governments deliver information more effectively and provide better services.**



**22%** of people surveyed are required to check multiple sources when searching for government information.

**59%** of people remain unclear as to how long it will take to satisfy their request for information.

**9%** don't believe that their personal data is being stored securely.

**75%** say there are long hold times for phone calls.

**50%** find information inconsistent across different sources.

**53%** say there are too many passwords to remember.

GOVERNMENT INFORMATION

# The aspiration: delivering a trusted service to citizens

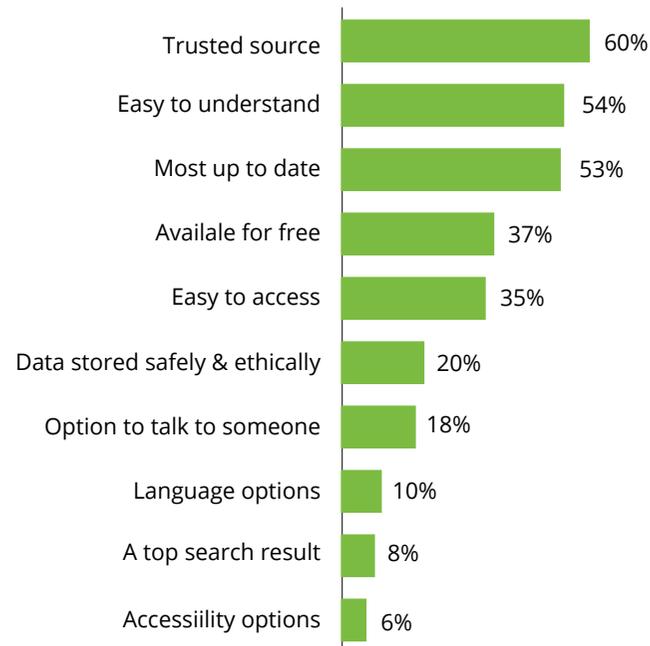
60% of citizens surveyed placed 'trust' in their top three most important considerations when accessing public information. This is followed by 'easy to understand' (54%) and 'most up to date' (53%).<sup>3</sup>

This aligns with survey respondents indicating that information found through government sources is trustworthy (58%) and generally easy to understand (60%).<sup>3</sup> Trust in government is increasing. Research conducted by Curtin University and the University of Otago suggests that trust in government at all levels has increased since the onset of the pandemic.<sup>6</sup>

Because government information shared through secondary sources is at a higher risk of being out of date or misinterpreted, government is in a unique position to leverage its growing trust, given it is the primary source of this information. There is an opportunity to syndicate content to third-party information sources using APIs.

GOVERNMENT ACTIONS AND CHALLENGES

Percentage of respondents ranking in top three, by importance factors



Survey question: Most important factors when choosing how/ where to access public information. Responses ranked 1st, 2nd or 3rd.<sup>3</sup>

**Trust** is consistently considered the most important factor across all age groups, particularly for 45-54 year-olds, with 65% placing it in their top three most important factors.<sup>3</sup>

**Male and female preferences** are mostly consistent, with females indicating a slight preference for public information to be 'easy to understand' (57% compared with 52%) and 'most up to date' (55% to 50% respectively).<sup>3</sup>



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# Personalisation

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# Connecting with people

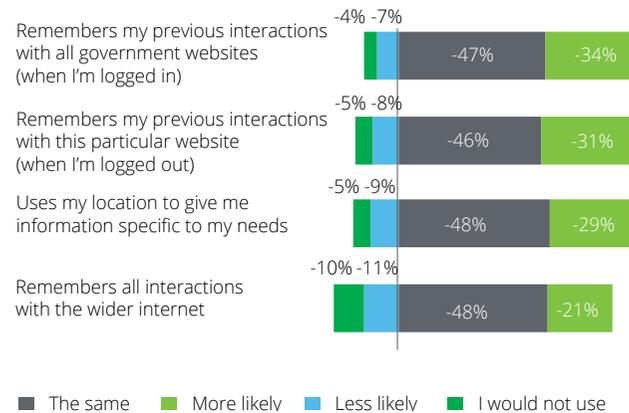
PERSONALISING ACCESS TO INFORMATION OFFERS GOVERNMENTS A WAY TO BUILD A MEANINGFUL AND TRUSTED RELATIONSHIP WITH THEIR CITIZENS AS PEOPLE, NOT JUST NUMBERS.

Governments can provide an option to citizens to remember their details, so they don't have to enter their information twice. This can be done by citizens choosing to provide information specific to need, based on location, and according to the individual's internet habits.

In this way, the government can deliver information that is more relevant to each individual, as opposed to being a generalised recipient of broadcast information.

Of course, public perceptions about using internet data does vary across the population. Some people are not comfortable sharing their data, citing privacy and data security issues. Modern technology allows government to give citizens the choice – to opt-in for personalised, relevant information, or opt-out if they choose.

### Three people say they are likely to use personalised government information and services for every person who chooses not to (3:1).



Survey question: Most important factors when choosing how/where to access public information. Responses ranked 1st, 2nd or 3rd.<sup>3</sup>

Results from the survey suggest Australians are interested in personalised, relevant information. Consider: 29% would be more likely to use a service if based on their location, 31% are more likely to use a service if their information was remembered from other government interactions.<sup>3</sup>

**3 out of 4 Australians surveyed say they would be more or equally likely to use government websites if they were personalised.<sup>3</sup>**

Personalisation technologies can facilitate comprehensive access to government services, which according to the OECD, is one of the key components of trust.<sup>7</sup>

Indeed, leaders consulted for this research noted that personalisation brings an accessibility dividend for 'hard-to-serve' cohorts, such as regional and remote communities and people with a disability. It may be the difference between using the service or not.

Providing accessible experiences benefits all users, not just those that are disabled or impaired, and government should focus on ensuring services are accessible-by-design.

# What are personalised services?

GOVERNMENT INFORMATION

Personalisation takes information shared by a person and their digital behaviour to deliver the citizen a relevant experience that is connected across all channels.

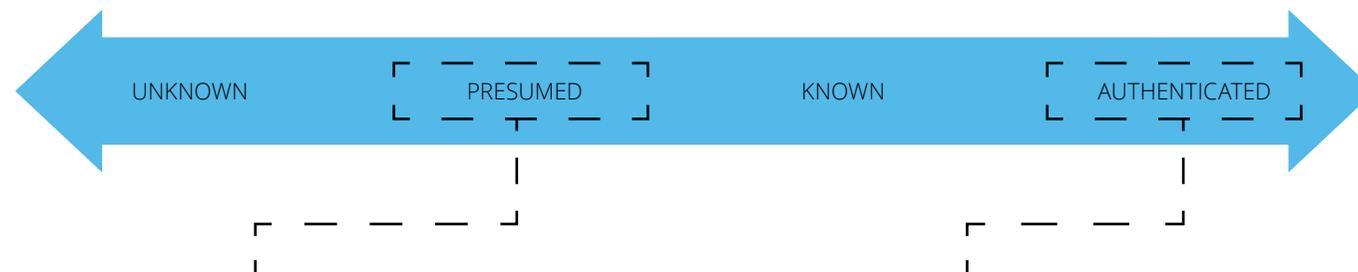
The objective is to make it easier for a citizen or employee to find what they want, how and when they want it.

Personalisation can take place across the end-to-end citizen journey. It starts when a person first enters a channel anonymously, information such as location, device type and browser are used to assist the citizen in meeting their future needs.

This journey extends to when a user has authenticated themselves and are linked to a customer relationship manager (CRM) database for further recognition and relevance.

PERSONALISATION

**Personalisation occurs along a continuum. It may be as simple as personalising based on device type in an unauthenticated environment, or as detailed as personalising based on past interactions and web history.**



## Implicit personalisation

When you don't know who your visitor is. This relies on analysis of metrics and behaviors to understand who they are. By tracking an anonymous user's geolocation or showing suggested or related pages based on where they have been browsing you can be relevant and useful.

## Explicit personalisation

When you know who the visitor is. This relies on specific data that the visitor chooses to share by performing actions. For example, the visitor creates a profile using an email address and personal information. This profile data is often stored in a database such as a CRM, enabling you to meet the individual needs of the user.

GOVERNMENT ACTIONS AND CHALLENGES

*Information provided by Adobe and Deloitte consultation with government leaders.*

## Personalisation tailors experiences to an individual's context.

This can be done using any or all of the following variables. Citizens can opt-in and opt-out based on their preferences.

### ENVIRONMENTAL VARIABLES

- IP address
- Country of origin
- Location
- Time zone
- Device type
- Operating system
- Browser
- Mobile carrier
- Connection speed
- Screen resolution

### SITE BEHAVIOUR VARIABLES

- Citizen
- New/return visitor
- Previous visit patterns
- Interests and affinities
- Previous purchases
- Previous activity exposure
- Previous activity responses

### OFFLINE VARIABLES

- CRM/CDP
- Call centre
- Second party data
- Third party data

### REFERRER VARIABLES

- Referring domain
- Campaign ID
- Affiliate/PPC
- Natural search

### TEMPORAL VARIABLES

- Time of day
- Day of week
- Recency
- Frequency

# Personalisation in action

AN ILLUSTRATIVE EXAMPLE: AN EDUCATION JOURNEY.

1. James and Jane's daughter, Chloe, is turning five next year and will need to start primary school.
2. They begin researching the best local schools in the area. They conduct a google search and click through to the Department of Education Website. The department presents James with their privacy policy and James consents to provide his information. Recognising that it is James' first visit and the search term that brought him in, the website presents James with relevant information that includes a link to a step-by-step guide to enrolment and a school finder tool.
3. James clicks on the school finder tool. Using the family's geolocation, schools are automatically filtered to those in their area and includes information such as distance to the school, saving the parents time and effort.
4. After careful consideration and comparison, James and Jane select a school. James, who is driving the search, is taken to the school's web page. Clicking on enrolment, he begins to fill out an online enrolment form.
5. James gets called away from his computer and other activities take precedence over the family's application. Recognising a period of inactivity, James is sent an automated reminder to his email, and is shown an ad for the school's enrolment on Facebook. He clicks on the ad and is taken back to the enrolment form. The details he previously completed are pre-populated. James is able to photograph and upload the critical documents required on his phone to support and complete the enrolment application.

## CASE STUDY: INCREMENTAL PERSONALISATION JOURNEY<sup>18</sup>

In 2016 **South Australia Tourism Commission** (SATC) began an incremental investment into Adobe Marketing Cloud as the foundation to support a 3.5 year digital marketing transformation.

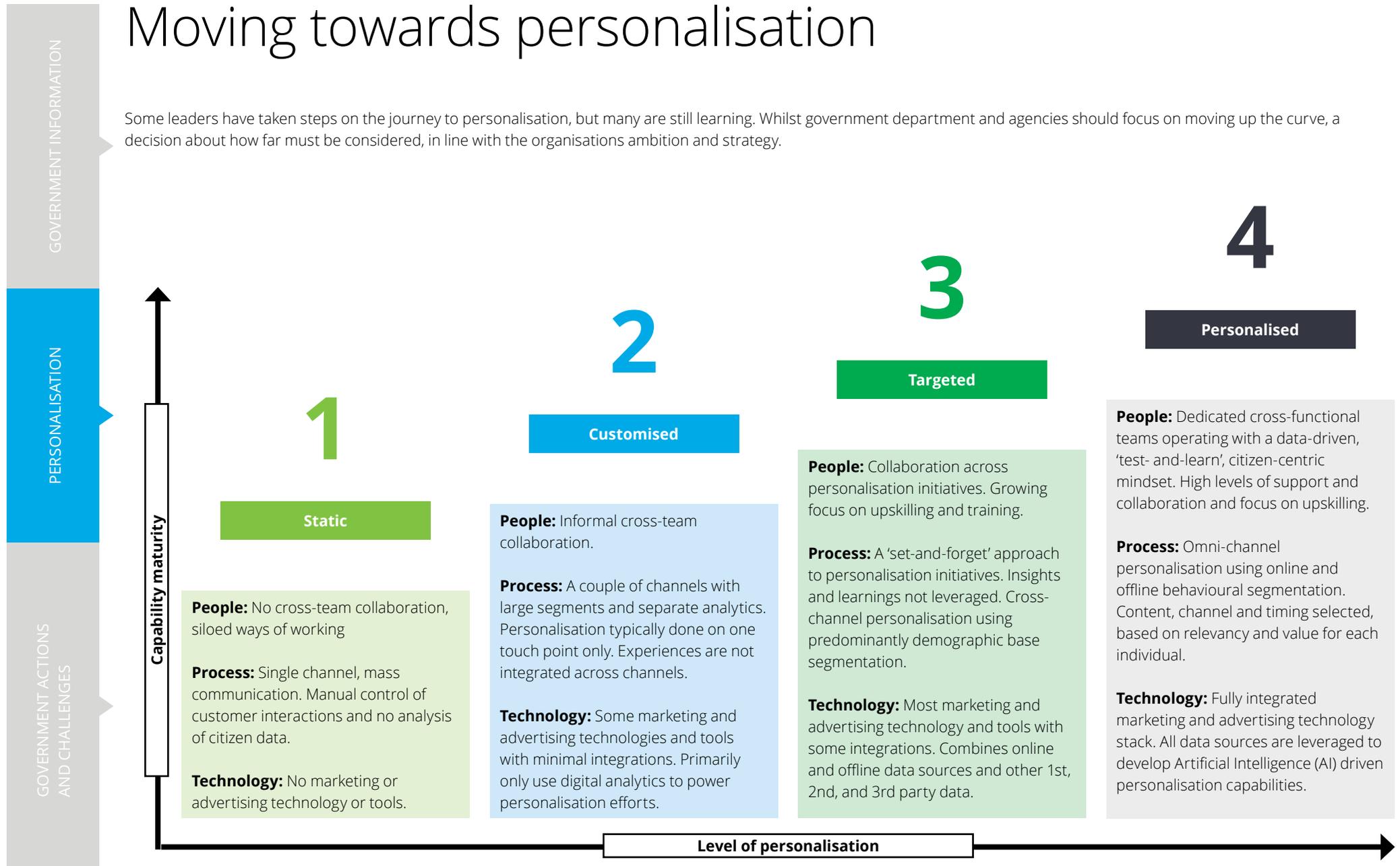
SATC's journey with Adobe began with an instance of 'Audience Manager' to simply manage data. It is now running the full suite of products that cover marketing and media activities both domestically and internationally.

Alongside the tech stack, SATC restructured its marketing team to ensure digital became a native skill across the entire marketing team.

This allowed SATC to develop a better understanding of their customers and deliver more cost efficient and effective marketing campaigns. It increased leads from 287,000 to 620,000 in one year, and decreased costs.

# Moving towards personalisation

Some leaders have taken steps on the journey to personalisation, but many are still learning. Whilst government department and agencies should focus on moving up the curve, a decision about how far must be considered, in line with the organisations ambition and strategy.



# Personalisation is a global commitment

GOVERNMENT INFORMATION

Both domestically and globally, governments have committed to delivering personalised experiences, and many have already begun their journey.

PERSONALISATION

## United Kingdom

Gov.uk has set out to provide trusted, connected and personalised interactions for users with an aspiration to offer services that are proactive, low-friction, channel-agnostic and more rapidly iterating. Gov.uk has been at the centre of the government's response to the COVID-19 pandemic, providing vital and up-to-date information and services.

## Singapore

Part of Singapore's 'GovTech' Strategy will identify high-impact areas for the deployment of AI in government, including automating rule-based tasks, providing personalised and anticipatory services, and anticipating situations such as traffic or security incidents

## Canada

Digital Operations Strategic Plan outlines a commitment for digitally enabled by design and easy-to-find information. Through the Web Renewal Initiative, Canada consolidated 1,500 websites across government into a single, user-centric website that makes its online information and services easier to find and use.

## United States

21st century integrated digital experiences act (IDEA) directs government agencies to provide simpler, more cost effective digital experiences for citizens, and generally make it easier to conduct business and transact online.

## Argentina

Argentina's Digital Government Strategy outlines a central ambition to build a personalised government experience for citizens. This led to the creation of Mi Argentina, a one-stop-shop service delivery platform. The platform integrated 1,000 government websites into a single website domain to service more than 123 million users as a 'front door' to government services.

## Digital Transformation Strategy:

'Digital transformation strategy' outlines an objective for smart services that adapt to the data individuals choose to share. This is already beginning to be implemented. Customised messages for individuals based on data that was pre-filled in myTax helped more than 230,000 people prepare their tax returns correctly in 2018.

## New South Wales Government:

'Beyond Digital' Strategy outlines a vision to deliver 'smart, simple and seamless personalised services available from anywhere'.

GOVERNMENT ACTIONS AND CHALLENGES



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## Government actions and challenges

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# Rethinking roadblocks

Government is about serving the very distinct needs of individuals, acknowledging each person's unique circumstances. Digital experiences provide rich opportunities to create personalised services. However, there are still some misperceptions in this area.

## MYTHS

## REALITIES

**Citizens don't want it**



**Citizens expect personalisation as an integral part of their online experience.**

Private sector experiences (for example food ordering and online streaming) are shaping citizen expectations in a public sector context. The reality is personalised experiences are no longer a nice to have. Three in four Australians surveyed are willing, or more likely to, opt in for tailored experiences if this could enhance their service delivery.<sup>3</sup>

**It's expensive or too hard to curate**



**Personalisation has a low barrier to entry and it's very easy to get started.**

Personalisation encompasses many techniques of varying cost and complexity. Organisations can start small with low hanging fruit and readily available data before scaling up and expanding capabilities over time leveraging customisable, commercial off-the-shelf personalisation technology that is accessible and affordable.

**It's prevented by legislation**



**Personalisation is encouraged by legislation.**

The US 21st Century IDEA Act mandates that agencies provide users with the option of a more customised experience when interacting with web forms, applications, or other digital services. Closer to home, privacy legislation helps by providing specific requirements and practical steps to guide organisations in providing a consistent and high standard of personal information management, considering the rights of the individual.

**There are privacy/security issues**



**There are security benefits.**

According to a Deloitte Access Economics report<sup>7</sup> on improved services, reliability and data security is the third most identified benefit of public cloud. Further, the Australian Cyber Security Centre Protected Certification provides greater certainty around the security of vendors, meaning data can now be stored and processed at the protected security level classification.

**It's purely a marketing tool**



**Personalisation is about equitable service delivery.**

Government has an obligation to serve all citizens equally. In an online environment this is enabled by personalisation. Personalisation improves accessibility for all, enabling flexibility of digital services to accommodate people with more complex needs, including vulnerable Australians, those in rural and remote regions, or those speaking different languages and or suffering mental or physical handicaps.

# Learning from experiences

GOVERNMENT INFORMATION

Today, government represents 23%<sup>9</sup> of total public cloud spending in Australia. However, use cases are not yet sophisticated, with government lagging industry with respect to personalisation. Even though the benefits of personalisation in public services are clear, the reality can seem unachievable for many government leaders who perceive several barriers in practice:

1. data privacy concerns
2. cyber security concerns
3. lack of skills and capabilities
4. building or buying technology

PERSONALISATION

We conducted interviews with key government leaders and subject matter experts to understand and learn from their experiences. This allowed for a better insight into the challenges faced in delivering personalised experiences.

GOVERNMENT ACTIONS AND CHALLENGES

## PERSONALISATION ACROSS INDUSTRIES<sup>10</sup>

Using a publicly available tool, Deloitte looked at the average number of marketing cookies dropped onto a user's device when visiting brand websites. Using this as a proxy for personalisation efforts, the findings indicate that government is lagging relative to industry.

Industry	Average marketing cookies
Information technology	43
Health and Fitness	38
Travel and Transport	37
Telecommunication and Media	31
Retail	28
Education and Employment	27
Financial	26
Real Estate	19
Energy and Utilities	17
Government	6

# Data privacy concerns

PERSONALISATION MUST CONSIDER AN INDIVIDUAL'S RIGHT TO PRIVACY.

Privacy risks increase when collecting and using big data, as does the challenge to fully comply with relevant legislation. Given personalisation requires significant data collection, secure retention, and maintenance of privacy, this is a challenge for government.

Personalisation has the potential to bridge whole of government services. However, complex internal policies and data privacy laws that can prevent the sharing of citizen data between departments are key barriers to achieving cross-services goals.

Because privacy is central to maintaining trust between citizens and government, agencies and departments rightly fear getting it wrong. Data used in the right way can help organisations deliver relevant, and personalised experiences that can make the overall citizen experience better. Privacy is an essential element of building and maintaining trust between citizens and government.

However, a fear of getting it wrong, coupled with a perceived resistance from citizens prevents many government organisations from acting. Our findings show that 3 in 4 survey respondents welcome the chance to personalise their interactions with the public sector, while others may still be wary.<sup>3</sup> Government has an obligation to serve all citizens equally and must respect individuals' choices, boundaries and preferences, to build and maintain trust.

Providing transparency around how citizen data is used, as well as obtaining meaningful consent from individuals, will be crucial as governments begin to provide more personalisation. Individuals must be informed about how their data will be handled and the value they will receive. Consent must be voluntary, informed, expressly given, specific as to purpose, time-limited and able to be easily withdrawn. Indeed, best practice in this space is enabling opt-in consent for personalisation and incorporating privacy by design. We are already seeing examples of this in government for instance, GDPR and NSW digital restart fund both mandate 'privacy by design'.

*Information provided through Deloitte consultation with government sector leaders.*

## CASE STUDY: DELIVERING A TRUSTED EXPERIENCE<sup>19</sup>

The Canadian Government sought to modernise its main website (considered the 'digital front door') to create a resilient and scalable destination that could provide crucial information to more than 37 million residents.

Leveraging Adobe Experience Cloud, Canada.ca **delivered stability and resiliency**, along with an authoring platform to support content publishing and measurement.

This proved critical during COVID-19 where the site could deliver new information from more than 50 departments.

The outcomes have so far have been very encouraging with a recent survey finding that 80% of visitors found Canada.ca to be a trustworthy and reliable resource.

**"The practical application of concepts of fairness and the role of consent will be central to the future of privacy in Australia."** <sup>11</sup>

- OAI Submission to the ACCC Digital Platforms Inquiry, May 2019

# Cyber security fears

THE CHALLENGE FOR GOVERNMENTS IS MAKING SURE THEY ARE PROTECTED, PREPARED AND RESILIENT.

Mistrust is exacerbated by digital security incidents, that have increased in terms of sophistication, magnitude and frequency over the past decade.<sup>12</sup> The more individual data an organisation holds, the more attractive it is to cyber attackers. This does cause government departments and agencies to tread carefully as they consider personalisation strategies.

In the digital economy, cyber risk is inevitable. However, according to a Deloitte Access Economics report, there is a correlation between a country's exposure to cyber risk and its preparedness for cyber attacks. Australia scores high on both fronts.<sup>9</sup>

Cloud-based personalisation can offer a range of potential security benefits with a clear understanding and definition of the shared responsibilities between government and its vendors. However, the issue of data sovereignty<sup>^</sup> and the location of data storage presents the biggest challenge to government when pursuing personalisation strategies.

Perceptions and policies regarding the storage of sensitive information has meant that much of this information is still stored on-premise. While the use of on-premise IT infrastructure is declining, it remains a critical part of government IT strategies.

Where cloud-based vendors can provide sovereign data centre and cloud capabilities in Australia, this may well satisfy government requirements.

To fully understand the risk of personalisation, government leaders should quantify and define the risks and rewards of personalisation, including the risk of not pursuing it. This will require input from both business and security teams. This will be a large cultural shift for government, where the security lead has typically had final say.

**'Organisations that manage and secure their own Information Technology (IT) infrastructure, such as an on-premise environment, need to consider as part of their risk assessment of cloud computing, the risks of not transitioning to cloud computing.'**<sup>13</sup>

- Anatomy of a Cloud Assessment and Authorisation: Australian Signals Directive

*Information provided through Deloitte consultation with government sector leaders. ^ Data sovereignty is the idea that data is subject to the laws and governance structures within the nation it is collected.*

## CASE STUDY: SECURING NATIONAL DATA<sup>20</sup>

The **US Census Bureau** sought to reduce barriers to participation, making it easier for people to self respond through a new online option.

Adobe Experience Manager (AEM) offered the security, scalability, uptime, and robust features needed to pull off the online census without a hitch.

Safety and uptime were other major factors in the Bureau's decision to partner with Adobe.

Because AEM Managed Services is FedRAMP certified, it passed the high levels of scrutiny necessary for government websites.

And because it's a cloud solution, the 24/7 monitoring added a layer of safety and security that was vital to collect a tremendous amount of census data in a short window of time — especially during high-traffic moments.

# Personalisation at scale

AN INTEGRATED ARCHITECTURE IS REQUIRED TO IMPROVE THE CITIZEN EXPERIENCE AND INCREASE OPERATIONAL EFFICIENCY.

GOVERNMENT INFORMATION

PERSONALISATION

GOVERNMENT ACTIONS AND CHALLENGES

## Delivery

The digital and physical channels where citizens interact with you and where personalisation can be leveraged to test and optimise experiences.

## Decisioning Engine

Ingests segment data and content metadata to deliver personalised content and messages to different channels. Often powered by AI/ML.

## Segments

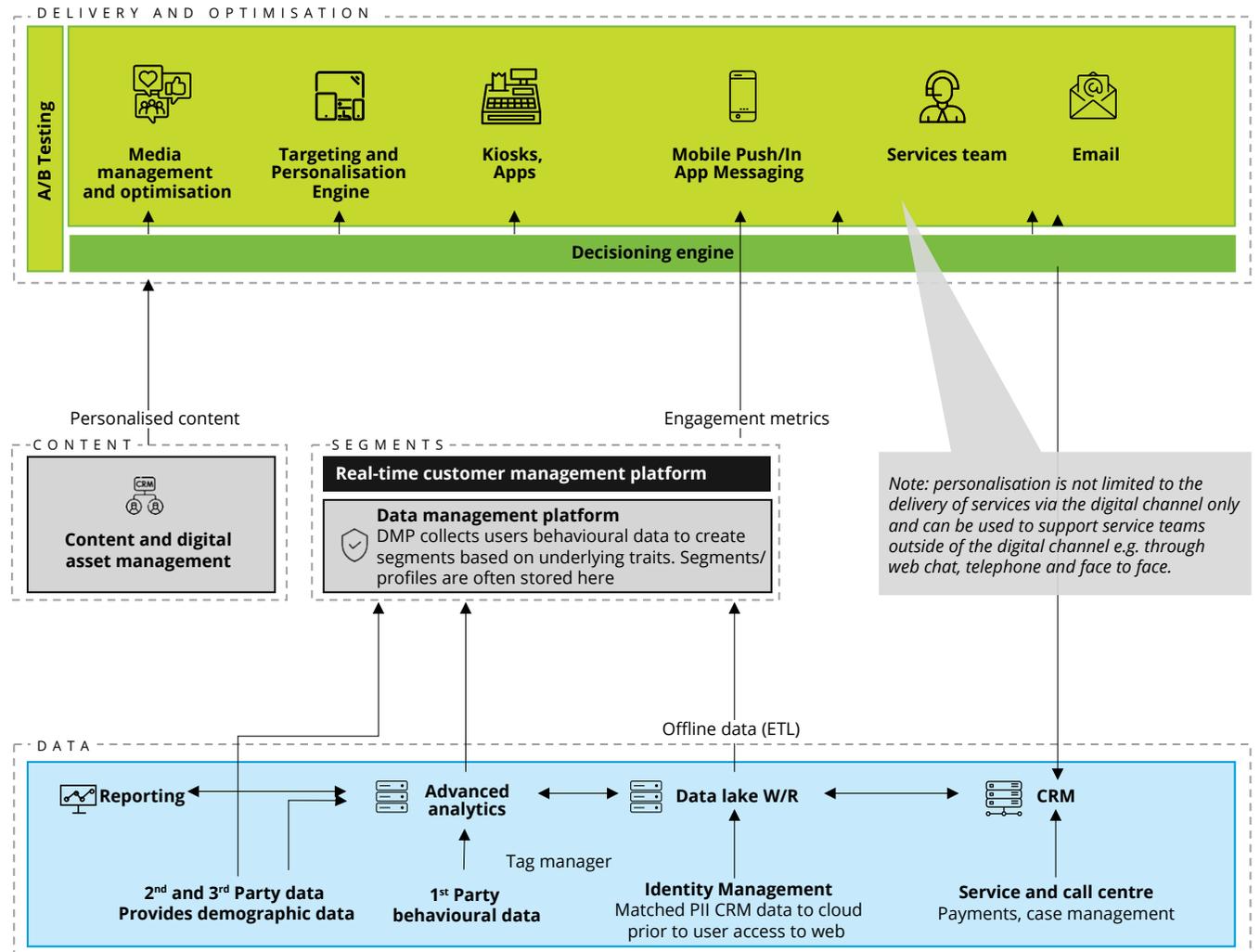
Segments/profiles are stored and accessed by the rest of the marketing stack especially the delivery channels. These can be shared with the analytics solution to align them with data captured onsite. Can also look at behavioral and demographic profiles for matching with existing customers using functions such as look-a-like modeling.

## Content

Content is created, managed and approved, then stored in an accessible place—typically a data asset manager that integrates with a suite of content creation tools and capabilities.

## Data

Data is aggregated, processed and stored to be made available for the systems above and ad-hoc use cases.



# Lack of in-house skills and capabilities

GOVERNMENT INFORMATION

PERSONALISATION

GOVERNMENT ACTIONS AND CHALLENGES

THE PUBLIC SECTOR FACES CONSIDERABLE SKILLS SHORTAGES.

Personalisation at scale requires the right technologies and data as well as the right skills and culture to enable it. This must be supported by processes, operations and governance to embed personalisation across all interactions.

Government organisations are struggling to deliver personalised experiences, citing insufficient resources as a top challenge. With the Australian Public Service (APS) requiring 100,000 additional technology workers between 2018 and 2024,<sup>15</sup> this shortage represents a substantial task for governments that have typically struggled to attract and retain the necessary IT talent.<sup>16</sup>

Recognising a need to upskill staff in digital, technology and data analytics, leaders are beginning to invest in capability uplift and enablement, moving skills away from traditional roles like managing webforms and working with industry to design training to support reskilling.

While leaders recognise the skills and capabilities needed to enable personalisation, changing organisational culture to support it is a different task. Achieving personalisation at scale requires a 'test-and-learn' mindset to start simply before scaling up, based on learnings and outcomes.

However, leaders noted that government's culture of risk aversion, decision inertia, and low tolerance for error is a key impediment to adopting new technologies and ways of working.

While skills and culture remain key barriers, the COVID-19 recession has helped to attract key talent to the public sector, which they may have otherwise dismissed. It has also forced many government departments to adopt a 'test-and-learn' approach to delivering services and accelerated the advancement of digital initiatives. Government is now in a unique position to capitalise on this momentum to drive national conversations around digital transformation and personalisation.

## CAPABILITIES REQUIRED DELIVER PERSONALISATION

Personalisation requires cross-disciplinary collaboration. This means traditional siloed marketing teams won't work. The following skills and capabilities will be needed:

- Cyber security
- Data analytics and segmentation
- Content management and creation
- Multi-channel content delivery
- Customer journey mapping
- Agile execution and a test and learn mindset
- User experience design

## CASE STUDY: UPLIFTING CAPABILITIES

The **University of Adelaide** aimed to establish a modern, secure and scalable digital marketing and insights platform by leveraging the Adobe target and Adobe Analytics tools. Deloitte assisted the University to improve its digital marketing capability by designing an end-to-end personalised user journey that was centred around implementing *Adobe Marketing Cloud*.

Information provided through Deloitte consultation with government sector leaders.

# Building or buying technology

GOVERNMENT INFORMATION

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BUILT OR CUSTOMISED TECHNOLOGY HAS CREATED COMPLEX INTERNAL SYSTEMS FOR GOVERNMENT.

While personalisation makes up 14% of the marketing budget, more than one in four marketing leaders cite technology as a major hurdle to personalisation.<sup>16</sup> This is true for the public sector.

In the past, government has taken a build approach to technology, driven by concerns over security, control and a belief that its specific use cases were unique and ill-suited for vendor technology.

This has created several present day challenges including aged infrastructure, legacy systems that are difficult to integrate, requiring manual updates, siloed data, and often high or unknown costs.

However, many agencies have since realised that the needs of government are not so different from those of industry, and that existing vendors have the capabilities to support their requirements.

In fact, government spending on cloud technology has increased dramatically in recent years,<sup>8</sup> with government leaders identifying the key drivers as the potential to lower costs, enable simpler procurement, increase access to innovation, and increase the ability to scale.

Indeed, the potential to lower the cost to serve by creating efficiencies through connected websites will be more important than ever in a post-COVID-19 world, where government will need to do more with less.

However, the greatest benefits for personalisation lie not in short-term cost savings, but rather greater access to future innovations and scalability.

As government increasingly turns to private sector vendors, it introduces the necessary capabilities to employ personalisation at scale, and enables its ability to keep pace with technological changes and increasing citizen service expectations.

As citizens increasingly demand timely, relevant omni-channel information, this will be an imperative for government leaders.

Information provided through Deloitte consultation with government sector leaders.

**500%** Increase in US Government spending on cloud providers in the past 8 years<sup>2</sup>

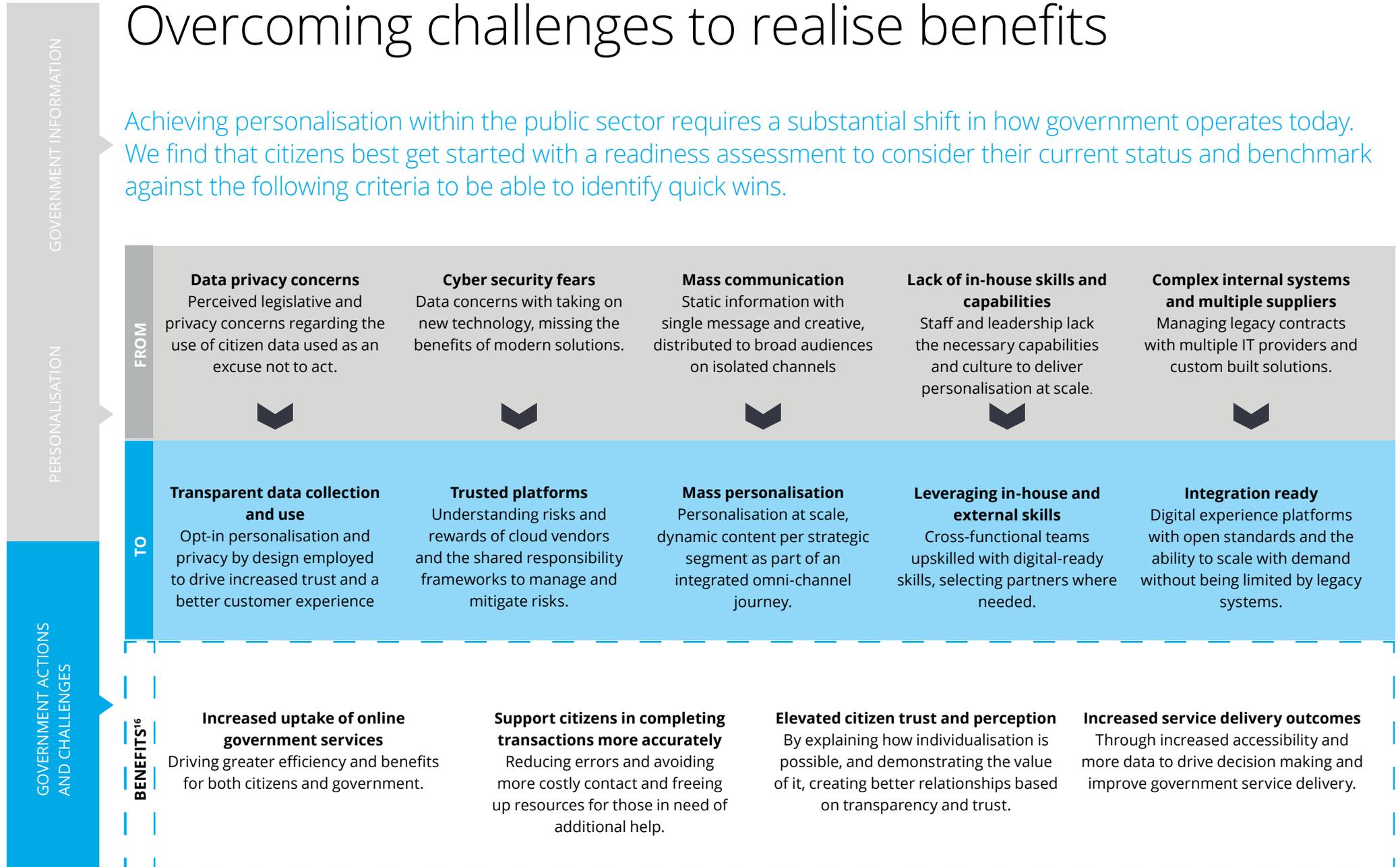
## CASE STUDY: PERSONALISATION DRIVING GOVERNMENT EFFICIENCY<sup>21</sup>

NSW Department of Education sought to migrate 2,200 of its websites to *Adobe Experience Manager* to provide a unified foundation from which both the department and the schools could start to better personalise and adapt digital experiences and content for teachers, students and parents. The move enabled the Department to push global content out to 2,200 school sites, 1,300 Facebook pages, and mobile apps from a central location within a matter of minutes.

This proved invaluable during both the bushfire and COVID-19 periods, enabling the Department to broadcast closure alerts to thousands of websites within five minutes, saving time and money.

# Overcoming challenges to realise benefits

Achieving personalisation within the public sector requires a substantial shift in how government operates today. We find that citizens best get started with a readiness assessment to consider their current status and benchmark against the following criteria to be able to identify quick wins.



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