





82%

Citizens say digital tools help improve police services



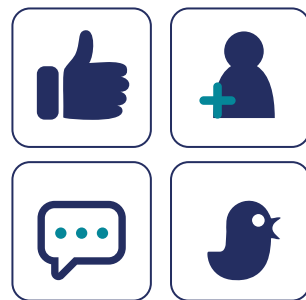
79%

Citizens want digital interaction instead of or in addition to face-to-face



88%

Citizens say digital technology helps beat crime



72%

Citizens say more likely to use social media than one year ago

# DEMAND FOR DIGITAL

Following on from similar Accenture research undertaken in 2012, our survey of more than 4,000 citizens found that they not only see digital police solutions as essential to crime fighting, but also are open to widespread use of digital channels as a means to communicate with the police. Indeed, eight out of 10 citizens said greater use of digital tools—such as mobile devices—could help improve police services. Yet the survey highlights that police forces across the world still need to grow their digital presence and invest in engaging citizens to close the gap between expectations and perceived reality.

In the 2014 survey of citizens across eight countries (see "About the survey," page 11), a convincing 96 percent of respondents said the public should play a role in police services. Coupled with the fact that two-thirds (66 percent) of respondents said they wanted more interaction with their local police, this public enthusiasm offers a golden opportunity to rebalance responsibilities for public safety through greater involvement from local communities. What is more, 79 percent of citizens who expressed an interest in more interaction said that they wanted the interaction to be digital (such as social media, e-mail or websites), either instead of or in addition to face-to-face. Indeed, digital was identified as a vital crime fighting tool; 88 percent of citizens said the use of digital technology can aid in investigating crimes and catching criminals. In addition, 77 percent of respondents said digital can help prevent crime—and since 79 percent of citizens said crime prevention is a key police service

(consistent with the 2012 findings), then police solutions that use digital technologies are clearly at the forefront of managing a top priority, according to the public.

Perhaps this pro-digital stance is unsurprising in a social culture where "always on, always aware" connectivity is the norm. What the survey findings highlight, however, is that certain technologies are considered fundamental to communication and interaction between citizens and the police. In particular, mobile devices led the field as most popular when we asked how comfortable citizens are with the police using advanced digital tools. Eighty-nine percent of citizens said they are comfortable with mobile devices being used to help police officers with information on the move—maybe reflecting the fact that more people have mobiles than electricity or drinking water.<sup>1</sup> Indeed, citizens' comfort levels run high when it comes to the police using a wide variety of digital tools—88 percent are at ease with the police using predictive technologies (to assist with crime patterns and prevention), 83 percent said they are comfortable with the use of security cameras, and—showing a keen interest in innovative police solutions—80 percent endorsed the use of wearable devices, such as body cameras.

Digital could also be a valid route for citizens who are seeking greater information sharing. When asked for their views on whether they receive enough information from their local law enforcement agency, 68 percent of citizens said they do not. In a climate of information overload, police forces need to think carefully about how best to improve the information deficit—and, once again, citizens suggest digital is a favored approach. Seventy-two percent of respondents said they are more willing to engage with their local police via social media today than they were a year ago. What is more, nearly three-quarters of respondents (74 percent) would use a mobile app created by their local police force to report crimes or obtain information about crimes in their area.

<sup>1</sup> Source: *Business Insider*, April 2012



Leap in demand for neighborhood contact

Police solutions that include digital options are on the rise in terms of citizen engagement preferences, too. Although 51 percent of respondents said they still prefer to interact with the police by telephone, and 19 percent in person, the desire to use mobile devices, social media, and websites has increased—more than doubling for the latter method in the last two years from 4 percent in 2012 to 9 percent in 2014.

As the police progress their digital journey, our survey respondents are also offering some interesting perspectives on how far and how fast that journey should go. While 82 percent said the use of digital tools could help improve police services, they do not want to lose sight of more traditional policing methods. More than three in four who do not have a police contact currently said they want neighborhood contact with the police (76 percent)—a 14 percent increase in desire since the 2012 findings (62 percent). Perhaps citizens are being influenced from two perspectives: not only the media's often sensational reportage of crime at a national level, which can lead to greater apprehension, but also the extent of police force cost cutting, which is having an impact on citizens' perception of the service. With austerity measures likely to continue to affect local resources, reassurance will be an important element of police communications to address citizens' ongoing desire for a physical police presence.

So, where are the gaps between citizens' expectations and perceived reality for the use of digital channels with the police? Here, the police should be congratulated for making






significant progress in adopting police solutions that advance their digital capabilities. The percentage of citizens saying that their local police force currently uses digital channels has more than doubled in the last two years—42 percent in 2014 versus 20 percent in 2012. However, despite this increase, in 2014, 77 percent of citizens said that digital should be used—a gap of some 35 percentage points from where they perceive the police are today. The expectation falls further short of perceived reality when we drilled down to the specific digital channel being used. Twenty percent of citizen respondents said that the police currently use websites or Web portals to communicate, whereas 46 percent perceive that they should; similarly, 13 percent said their local police used smartphone apps against 34 percent who believed that they should. Finally, 24 percent of respondents said the police use social media—such as Twitter, Facebook or YouTube—and 42 percent believe that they should use these digital methods. Indeed, the demand for certain social media increased against the 2012 survey results; for instance, of those who would use social media to interact with police, 35 percent said they would most likely use Twitter in 2012 versus 42 percent in 2014.

In all, according to citizens, the police have demonstrated an increased use of digital technologies, in scale and scope, over the past two years. Such digital progress is proving to offer positive outcomes—not only as a means to better fight crime, but also to develop a more effective relationship with citizens.

Citizens are open to police solutions that embrace digital channels

-  **79%**  
Citizens want more digital interaction with their police force
-  **72%**  
Citizens are more willing to deal with the police using social media today than a year ago
-  **68%**  
Citizens want greater use of mobile apps between citizens and police
-  **74%**  
Citizens would use a mobile app created by their local police

Citizens are comfortable with the police using advanced digital tools, such as:

-  **89%**  
Mobile devices
-  **88%**  
Predictive technologies
-  **83%**  
Security cameras/CCTV
-  **81%**  
Identification devices
-  **80%**  
Wearable devices

# THE DIGITAL IMPACT

In general, the survey shows an increase in citizens' perception of the police use of digital tools between 2012 and 2014, and many positive indications around the use of digital channels. However, the use of digital technologies is a fairly recent phenomenon; as a result, factors such as age and geography may influence variations in the response to both the use and desired use of digital channels. Let us take a deeper dive into the data to assess the impact:

## AGE IMPACT

The survey asked respondents to indicate whether they were part of five different age group categories (see "About the survey," page 11). Nearly everyone surveyed expressed a desire for more digital interaction—78 percent of 18 to 24 year olds who want more interaction with police want to interact in a more digital way, along with 78 percent of 25 to 34 year olds and 78 percent of 35 to 44 year olds who desire greater interaction. However, when we evaluate the responses to a demand for more digital interaction only, as opposed to a combination of more digital and more face-to-face contact, we see some differences emerge: 18 to 24 year olds who want more interaction with police are 10 percentage points more likely to want more purely digital interaction compared to 25 to 34 year olds and 35 to 44 year olds (that is, 50 percent versus 40 percent and 39 percent respectively).

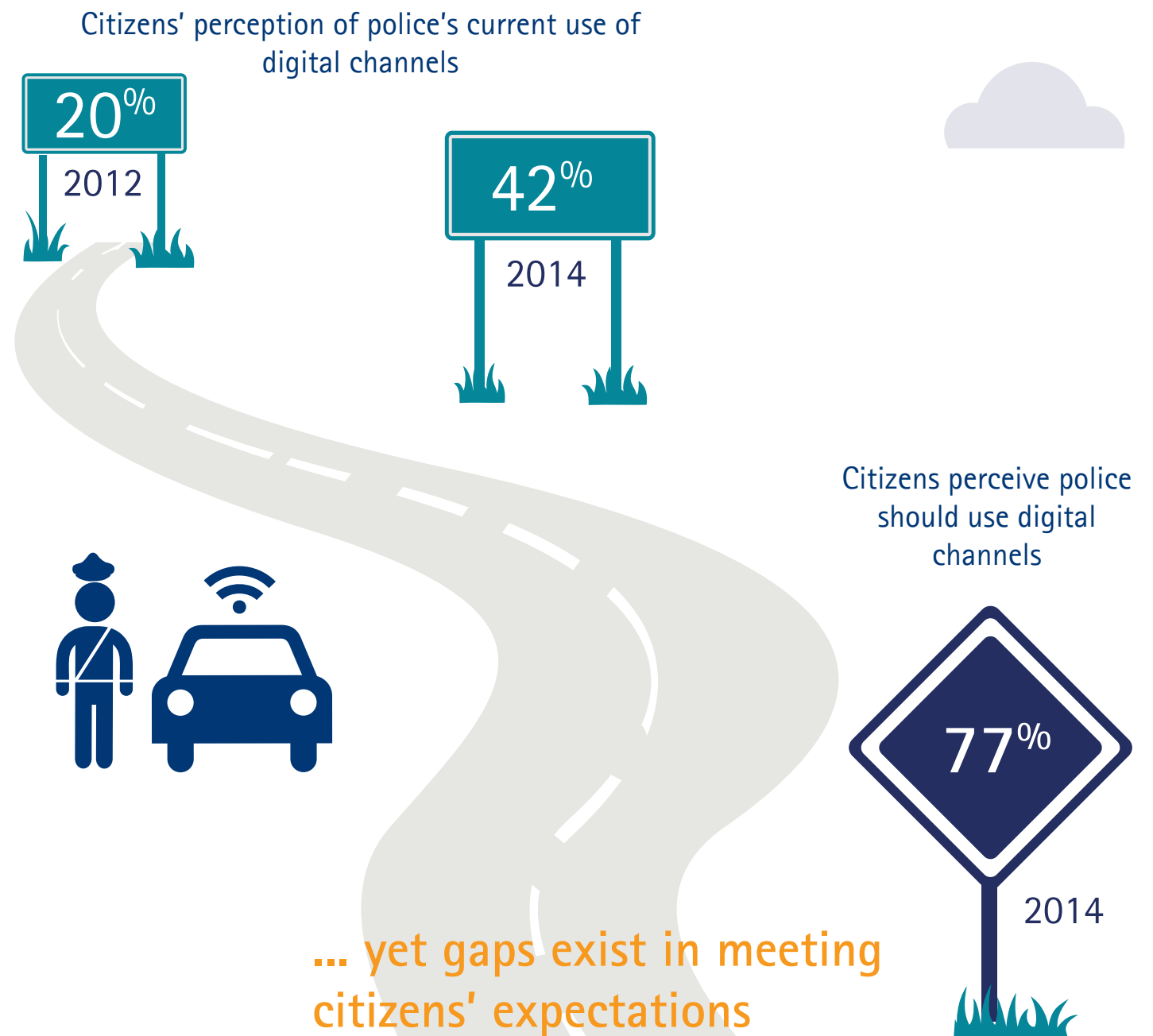
There are further interesting nuances with respect to specific types of digital interaction. Older respondents lead with interest in the use of websites with the police; 73 percent of 18 to 24 year olds would consider a community/neighborhood website helpful, compared to 80 percent of 25 to 34 year olds and 82 percent of 35 to 44 year olds. The gap is not considerable and it would be hard to gauge whether the discrepancy is due to websites not being seen as such a compelling proposition among younger citizens, or whether it is due to the younger group being less likely to live in a neighborhood environment and therefore not placing as much value on community activities.

Perhaps unsurprisingly, we found younger citizens skew toward social media. When asked what social media sites respondents would most like to use to interact with the police, 86 percent of 18 to 24 year olds choose at least one social media platform from a list of options,<sup>2</sup> versus 88 percent of 25 to 34 year olds, 82 percent of 35 to 44 year olds, 79 percent of 45 to 54 year olds, and 64 percent of 55 to 64 year olds.

However, interest in mobile apps spans the generations. Irrespective of age, nearly everyone wants greater use of mobile apps as a communication tool between citizens and police (74 percent of 18 to 24 year olds, 75 percent of 25 to 34 year olds, 76 percent of 35 to 44 year olds, 71 percent of 45 to 54 year olds, and, with just a slight drop, 60 percent of 55 to 64 year olds).

<sup>2</sup> Respondents were asked to select all that apply from a list as follows: Twitter, Facebook, YouTube, a blog, LinkedIn, Snapchat, Instagram, Pinterest and other.

## Police are making excellent progress on their digital journey...





## COUNTRY IMPACT

Four more countries were added to our sample since the 2012 survey. Of the countries we approached—Australia, France, Germany, the Netherlands, Singapore, Spain, the United Kingdom and the United States—77 percent of citizens said the local police are doing an effective job. Indeed, respondents showed less concern about crime in local neighborhoods (46 percent) or their county or state (69 percent) than they did about the broader, country-wide level (77 percent are concerned at the country level).

From a digital perspective, the police across all countries were considered to be moving forward with digital, with Singapore and the Netherlands exceeding 50 percent in terms of the perceived use of digital channels.

Specific highlights include:



Australian citizens are keen to engage with the police; 84 percent said the public should play a role in crime reporting, and 78 percent said the public should participate in neighborhood watch programs.



France's citizens feel least safe among countries surveyed, although nearly two-thirds said their police are effective; 70 percent rank neighborhood safety as the top service they want their police to provide, ahead of preventing crime (68 percent) and investigating and catching criminals (62 percent).



In Germany, 67 percent of citizens said the police should interact with the public via some type of digital means, although just 34 percent say the police currently interacts with the public in a digital way—the lowest percentage among countries surveyed.



Singapore's citizens have the highest scores of any country surveyed for feeling safe (91 percent) and saying their police force is effective (92 percent).



Despite a desire for more, digital interaction with police in the Netherlands is higher than most other markets surveyed (51 percent).



Eighty-four percent of Spanish citizens said the police should be using digital channels more—the highest percentage of any other country.



In the United Kingdom, 76 percent said the police should interact with the public via some type of digital means, although only 38 percent said the police currently interacts with the public in a digital way.



For United States citizens, 66 percent are more willing to engage with the police via social media versus a year ago, and 66 percent would use a mobile app created by the police to obtain information about or report crimes.

Citizen opinions are similar across geographies

Citizens say they ...



Feel Safe



Want to play a role in crime reporting



Expect the police to use digital



Believe digital improves police services



Australia

79%

84%

78%

82%



France

69%

66%

72%

80%



Germany

90%

80%

67%

68%



Netherlands

88%

80%

80%

83%



Singapore

91%

84%

85%

91%



Spain

73%

68%

81%

92%



UK

83%

83%

76%

75%



US

84%

75%

74%

82%

# THREE WAYS TO DEVELOP THE DIGITAL JOURNEY

The 2014 research offers insights into how police forces around the world can develop their digital journeys. Here are three key takeaways for the police:

## Embrace “show and tell” digital



Citizens expect to play a role in policing

Citizens are keen to take an active role in policing and are responsive to the use of digital channels—even new technologies such as wearables. By using digital technologies, the police can take advantage of this willingness to be involved, while at the same time expanding their use of digital to tackle crime. In doing so, police services may need to consider ongoing education programs that advise citizens on the “what” and “how” of their digital capabilities. By being more open and transparent about police activities—using digital to run Web chats or tweeting about their daily challenges—forces can use these channels to serve other communications purposes, such as when they want to remind citizens to watch for thieves in certain areas.

## Adopt a “prevention is better than cure” approach

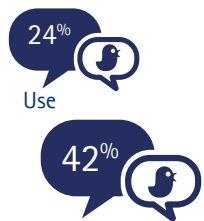


66%

Citizens want more police interaction

Citizens recognize that digital can be useful to prevent crime, as well as detect it. A keen majority of respondents said prevention should be a police priority—and the public expects to help, with nearly every respondent saying that they are willing to play a role in policing. Digital offers the ideal means for the police to communicate and build trust with citizens—whether using social media to inform or websites to help citizens share information, the opportunity for dialogue is more readily available. As resources decline and citizens’ demands change, it is likely to become more important that the police teams with relevant organizations, such as local authorities or health departments. In doing so, the police can gain insights that will help them understand when and how to intervene—preferably before a crime has been committed. And with greater access to more data, the police can perform analytics on this wider data set to open up further potential for preventative measures.

## Balance physical and virtual neighborhoods



Use

Should use

Citizens say police should use social media channels more to communicate

Using traditional means to interact with the police is clearly still important to citizens—and with 70 percent saying they want contact via the telephone or in person, demand for the physical presence of the police is not in question. By balancing a physical presence (for example, neighborhood contacts, face-to-face services) with the virtual world (for example, Facebook, websites, mobility), the police can better transition to digital and help citizens gain more confidence in the new channels. Over time, physical boundaries are blurring and citizens are seeking to interact with the police in different ways. Virtual criminality, where the perpetrators may be anywhere in the world, requires a new kind of policing that takes account of different data sets and the means to manage them. Information has never been in short supply; now, the police need to consider how to share it, who they share it with and how they use it to achieve the best possible outcome.

# ABOUT THE SURVEY

The 2014 online citizen survey included 4,000 respondents (global margin of error  $\pm 1.55$ ), across eight countries, with approximately 500 respondents each from Australia, France, Germany, the Netherlands, Singapore, Spain, the United Kingdom and the United States (margin of error  $\pm 4.38$  per country). Year-over-year data comparisons from 2012 to 2014 are based on the full set of countries in each wave. Even when accounting for variations in the markets between the two waves, patterns in the data show consistent year-over-year trends.

The survey age categories represented include 30 percent between 18 years and 34 years of age 37 percent between 35 and 54 years of age and 32 percent who were more than 55 years old. Fifty-one percent of respondents were female and 49 percent were male. The survey was conducted by Penn Schoen Berland in August 2014.



## CONTACTS

For more information about the Accenture online citizen survey, or to learn more about technology-led transformation in policing, please contact:

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What does it take to deliver public service for the future? Public service leaders must embrace four structural shifts—advancing toward personalized services, insight-driven operations, a public entrepreneurship mindset and a cross-agency commitment to mission productivity. By making these shifts, leaders can support flourishing societies, safe, secure nations and economic vitality for citizens in a digital world—delivering public service for the future.

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