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The Digital Citizen Survey

Issue 1: Uncovering opinion around digital government services



Overview of the Survey



In 2021, Publicis Sapient commissioned one of the largest private surveys on digital government services in Australia.

It looked at usage, experience and perspectives on different aspects of how citizens engage with governments through digital.



It was carried out online in October 2021 and involved more than 5,000 participants across Australia with a demographic range of states, age groups, income status and other factors reflective of the country's population.



Our intention is to run this as an ongoing survey, building an index on progress and changes to how citizens engage or would like to engage with government digital services over time.

We will also continue to include topical issues to gauge citizen responses to them and are always open to suggestions for questions to incorporate.



Summary Insights



Overall Demand and Support for Digital Services

There's a large and growing demand for digital government services across Australia—nearly all Australians are using at least one government service digitally, with the most cited services (used by more than half of the population) being healthcare and finance/tax-related services.

Australians want more digital services in all areas—the majority of citizens are open to as many services being made available digitally as possible. Healthcare, ATO and Centrelink were the most common areas where citizens have suggested extending digital service offers.

Increasing uptake of digital services is all about user experience—financial incentives or increasing service offers are less likely to drive new digital users. The key drivers are making services easier to access, simpler to understand and saving citizens' time.



Service Area and State Comparisons



Digital usage varies by service area, whereas user experience is high across the board—there is a significant difference in digital usage across key service areas with citizens three times more likely to use digital health services compared to legal services, even though experience is rated highly across all areas.

Usage and experience is broadly consistent across states, with some exceptions—whilst user satisfaction is high across all states and usage is consistent, there are opportunities to learn from best practices in some areas, for example legal and family services, given more material differences between higher-performing states and others.

COVID-19 had a significant impact on the demand and use of digital services—those states most affected by COVID-19 have seen the greatest proportion of new users in the last 18 months, as well as the highest demand for digital services.



Artificial Intelligence and Trust

Australians are generally comfortable with Artificial Intelligence (AI)-generated services—the majority of citizens are open to services that remember their details or tailor offerings based on personal information, though the comfort levels are higher for people who are younger, on higher incomes, have good tech skills and are currently using digital government services.

High levels of trust in government overall with targeted interventions required to build trust further—trust is a key consideration for openness to innovations in AI. Whilst trust levels are high overall, there is a dip from an age perspective between younger and older citizens. Addressing issues around a perception of losing control of information and reassuring people around security protocols are the key priorities for building trust.



Targeted Digital Support When Citizens Need It

There are opportunities to scale and enhance service offers around life

events—governments' focus on life event service offers are well-placed, with over half of Australians experiencing a major life event in the last year. Younger Australians have the greatest needs in these areas. They're the most willing to engage in this way, but also the most likely to not find what they need.

There is a high demand for digital support for those experiencing mental health issues—more than half of the population has sought treatment for mental health issues. Those who are more likely to experience mental health issues—younger people, those with a precarious financial position and those who have experienced a major life event in the last year—are also significantly more likely to seek support if offered digitally.



Experiences and Perceptions of Different User Groups

Openness to innovation within

Indigenous communities—Aboriginal and Torres Strait Islander people are an above-average user group for digital services. They are significantly more trusting of governments in using AI and value service customisation higher than the average. They also self-assess as needing more help and guidance in navigating digital services as a key driver to increase uptake compared to the average.

Potential service gaps for people with

disabilities—people with disabilities have a higher-than-average enthusiasm for digital services and are very open to services being personalised based on their disability status; however, they are nearly twice as likely to not use digital channels because they don't cover the services they need.

Lower support for digital in rural

areas—people in rural areas appear to be more reluctant users of digital services, suggesting the need to engage and build trust with these communities if digital is to help provide a consistent service across the county.



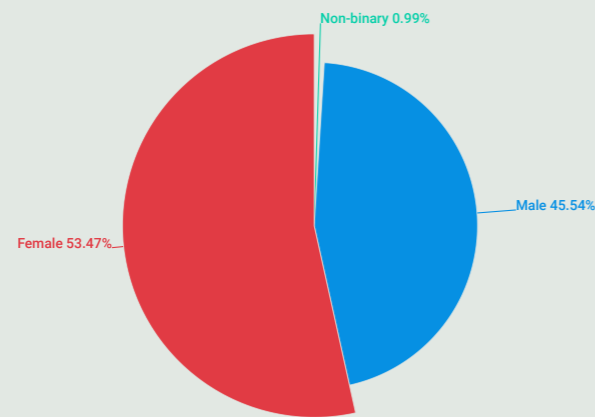


Scope, Analysis
and Findings

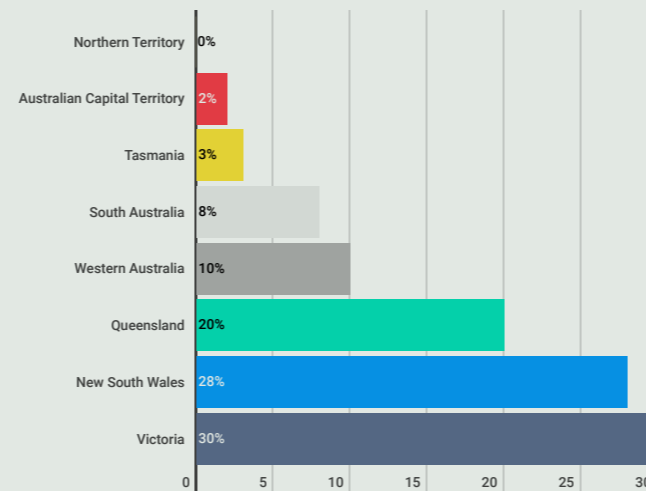
Survey Approach and Key Demographics

The survey was conducted online over the course of approximately one week in mid-October 2021. The survey involved 5,051 participants with a range of demographic characteristics that broadly reflect the population of Australia.

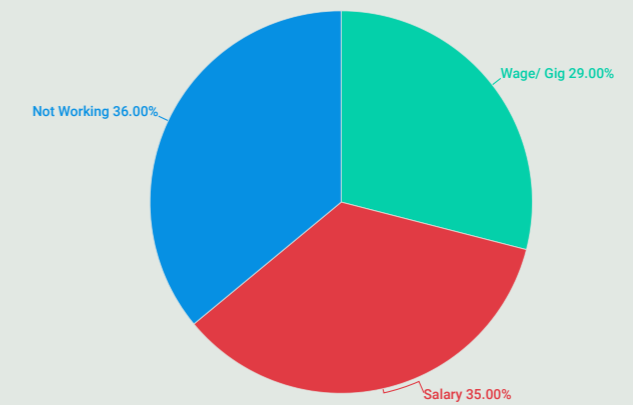
Gender



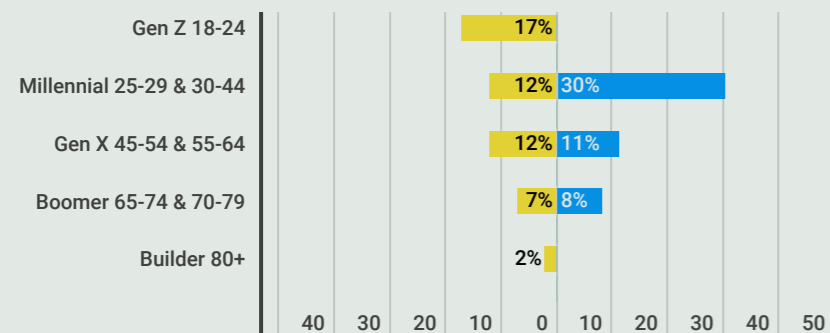
State



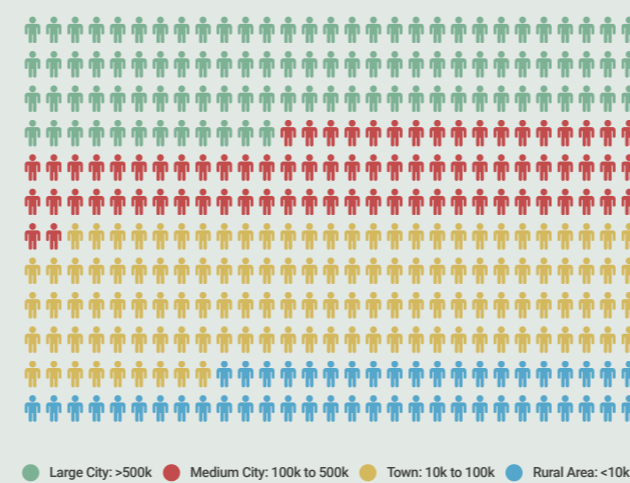
Career



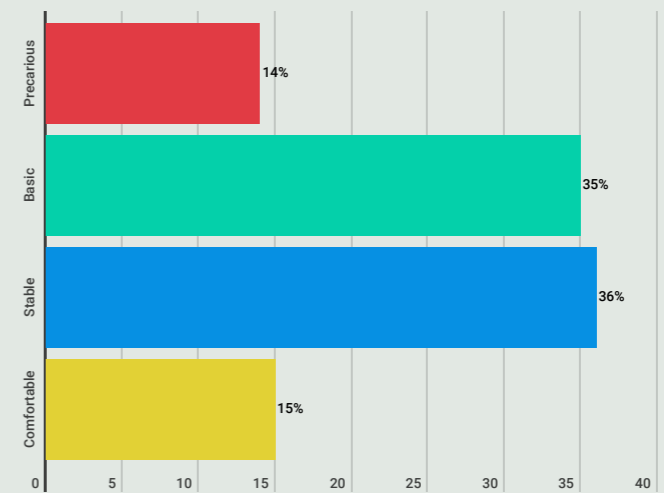
Age Group



Community Size



What is the financial situation of the employed participants?



- **Comfortable** - My finances allow me to lead a comfortable life.
- **Stable** - I am doing fairly well. Bills are paid and I have some savings. Overall, I am in good shape.
- **Basic** - I am mostly making ends meet. I may have some debt. I don't have any significant savings.
- **Precarious** - I have unpaid bills and I am unsure about how I will pay them. I have debt that will take a long time to pay off.

Use of Government Digital Services

Nearly all Australians are using at least one government service online, highest within the Millennial group and those living in large cities. For those working, financial situation has less of an implication on usage.

88 percent of respondents are using government digital services.

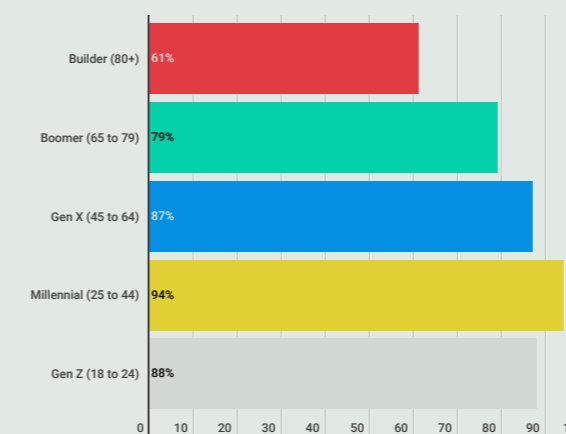
Millennials are the most likely of any age group to use government digital services (94 percent compared to 79 percent of Boomers and 61 percent of Builders), which is driven by their higher use of employment and family-related services.

The very few non-users are more likely to be older, not working, rural, less educated, unvaccinated and not supportive of government (as a concept, not specifically the party in power).

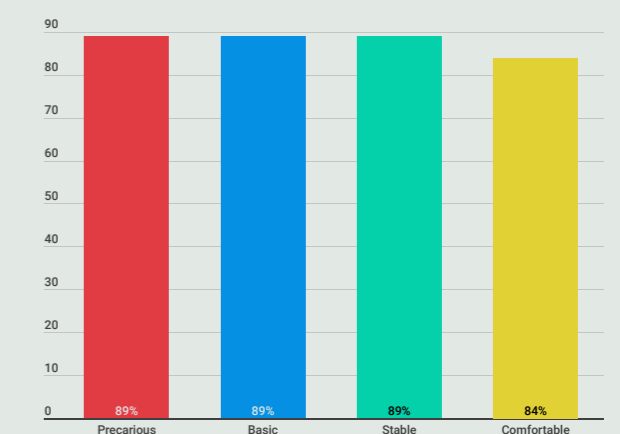
Financial position doesn't appear to be as strong a driver of digital usage, with 'precarious,' 'basic' and 'stable' financial positions all having similar levels of usage and a higher percentage of users than those self-assessed as 'comfortable.'

Overall, Australians who access government services digitally have been doing so for at least one year, with the average being 6.6 years. Not surprisingly, number of years used follows age profile, with Builders at 8 years through to Gen Z at 4.8 years.

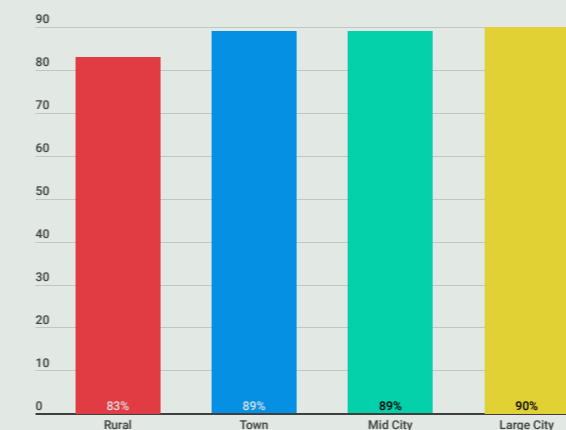
Use of Digital Services by age groups



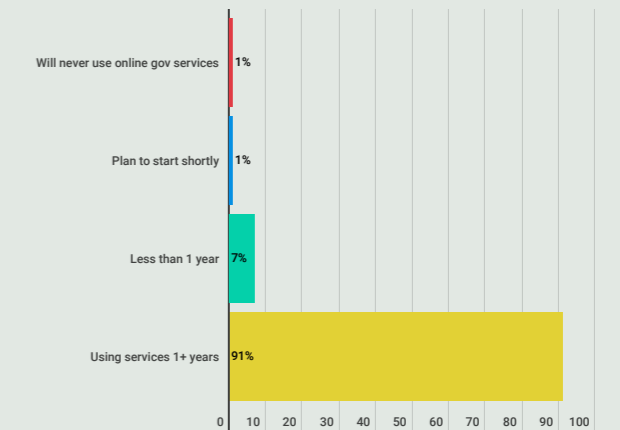
Use of Digital Services by financial situation



Use of Digital Services by community size



How long have they been accessing some government services online?



Reasons for Using Government Digital Services



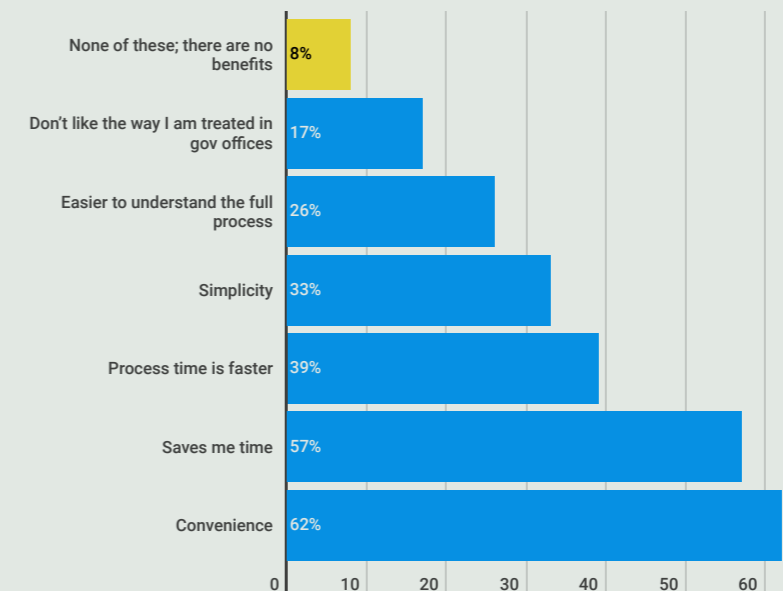
92 percent of Australians want to use digital services more, with 'convenience' and 'saves me time' as the biggest drivers of accessing services this way.

92 percent of Australians want to use more digital government services.

'Convenience' and 'saves me time' are more important than simplicity to established users of government digital services.

Dissatisfaction with face-to-face services is not a major driver of seeking digital services. This may suggest that citizens are generally happy with these channels, but also emphasises the importance of creating a good omni-channel experience for citizens across service access points.

What did you like about using online government services?



Resistance to Government Digital Services

Only a small proportion of Australians won't use digital government services, with 'time taken' and 'difficulty finding information' cited as key barriers.

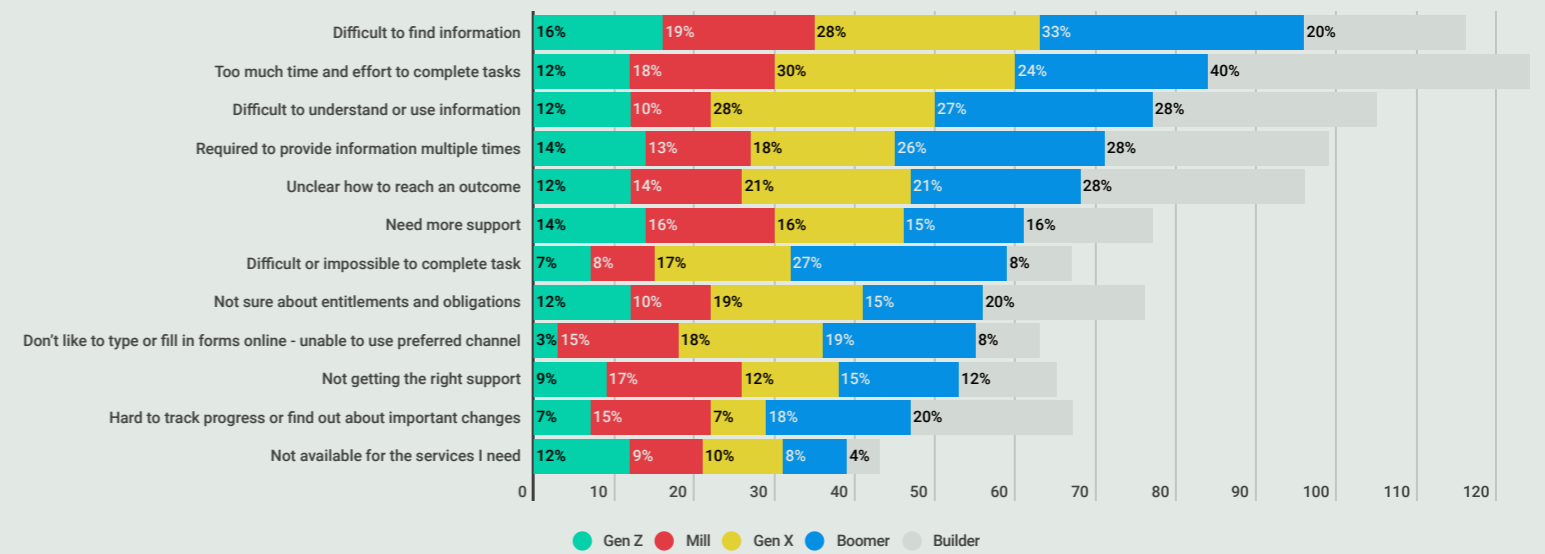
Only 8 percent of Australians refuse to use digital government services.

Of the few who indicated they are not using digital government services, the main reasons given are as follows:

- Too much time and effort to complete tasks (highest among 'Builder' age group and those unsupportive of governments)
- Difficult to find information (highest among 'Boomers' and those without technology skills)
- Difficult to understand or use information (highest among 'Gen X' and 'Builder' age groups)

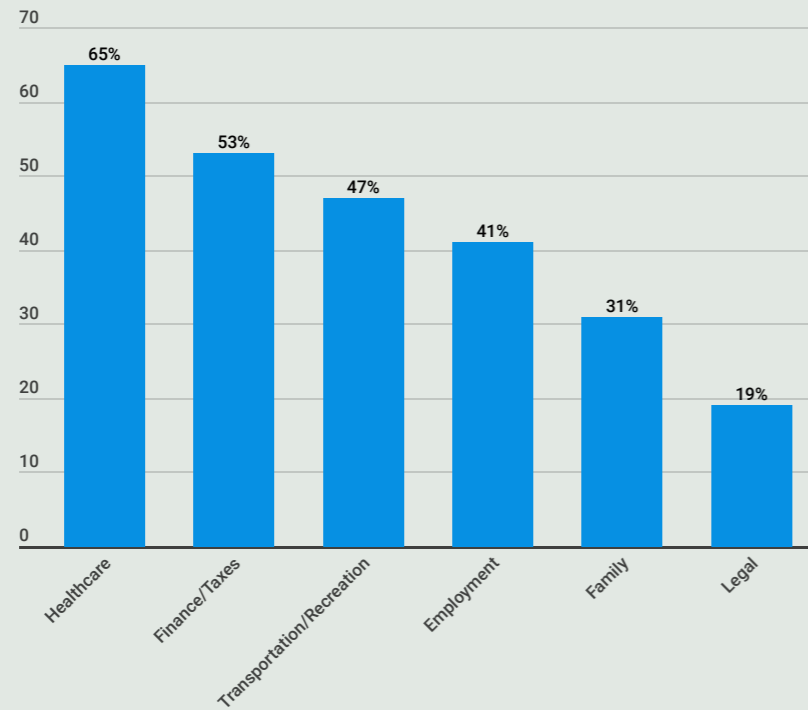
Only a small number, skewed towards younger generations, were not using digital government services, as they don't meet their service needs.

What didn't you like about using online government services?

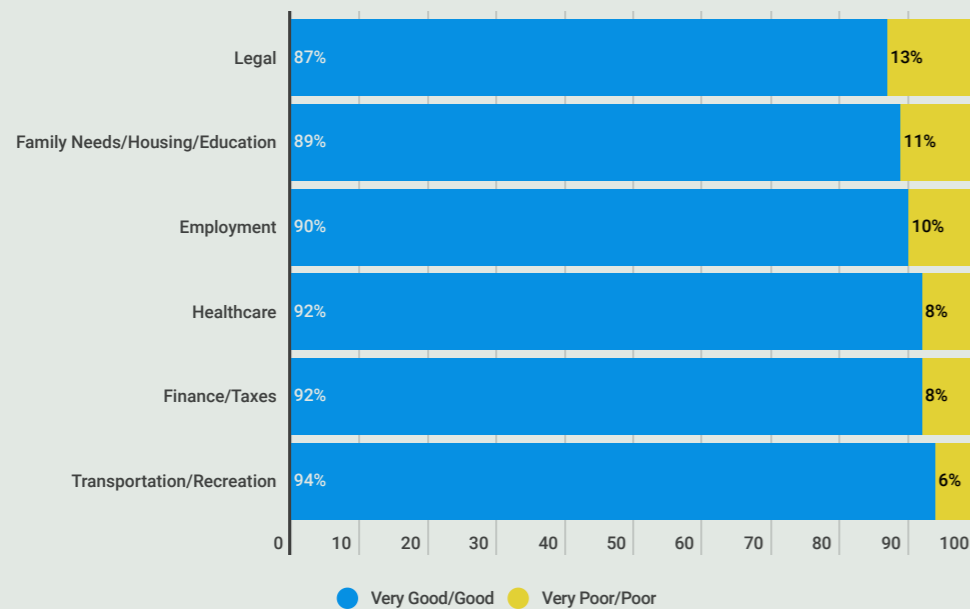


Digital Service Usage and Satisfaction by Service Area

Which, if any of the following, have you ever accessed online using the government website or app?



What do you think about these digital government services?



Although usage varies considerably across six core service areas, satisfaction levels are consistently high across the service areas.

There is quite a variation of usage across the six defined service areas.

Healthcare is the most popular at 66 percent of those using digital government services, and legal is the least popular at 19 percent.

There is some variation by age group, with Gen Z and Millennials using a much higher proportion of employment services (52 and 50 percent, respectively) than older generations (e.g. Boomers, 14 percent).

Millennials and Gen X are high users of tax and other financial-related services at 67 percent and 66 percent, compared to Builders at 28 percent.

Healthcare services are the most consistently used across age categories.

Nearly universally, those who use digital services are satisfied with them, rating them as good or very good.

The highest level of satisfaction is for digital transport and recreation services (94 percent rating 'very good' or 'good'), and the lowest is legal, which is still rated 'very good' or 'good' by 87 percent of users.

Opportunities to Grow Digital Service Uptake

There are some opportunities to grow service uptake further through improving the user experience, especially simplifying and making services easier to access.

Overall, 92 percent of respondents said they would use additional services.

The key factors to improving service and encouraging usage are creating a simple (44 percent), easy (44 percent) and efficient (41 percent) experience.

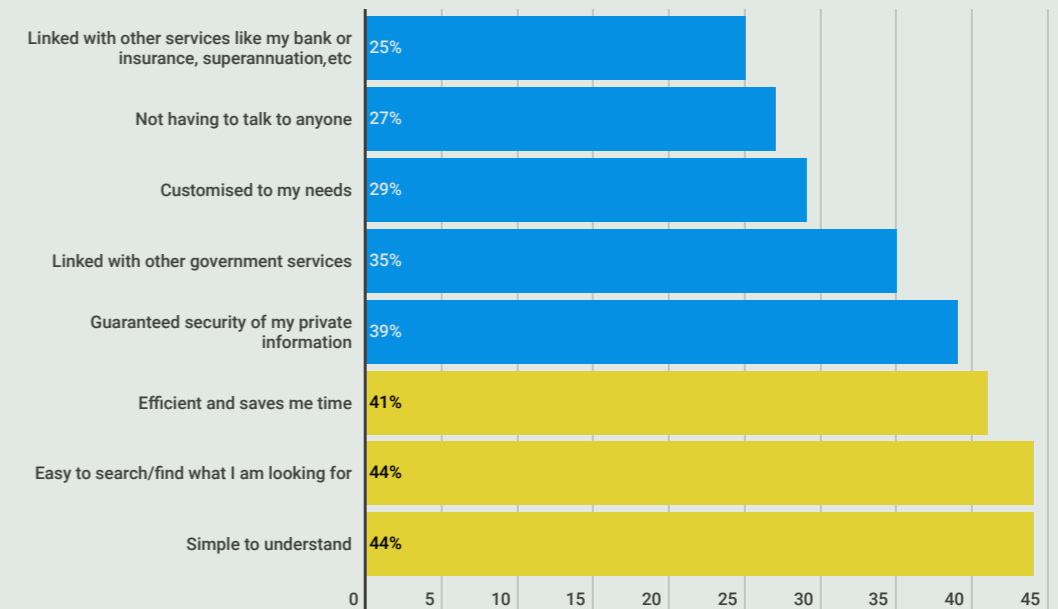
This suggests that ‘saves time’ and ‘ease of access’ are more important than clarity or guidance as a message when promoting digital government services to existing users.

Respondents did not rate customisation as a particular driver of improved experience (27 percent), although this may indicate the need to educate them on the potential benefits of a more personalised experience.

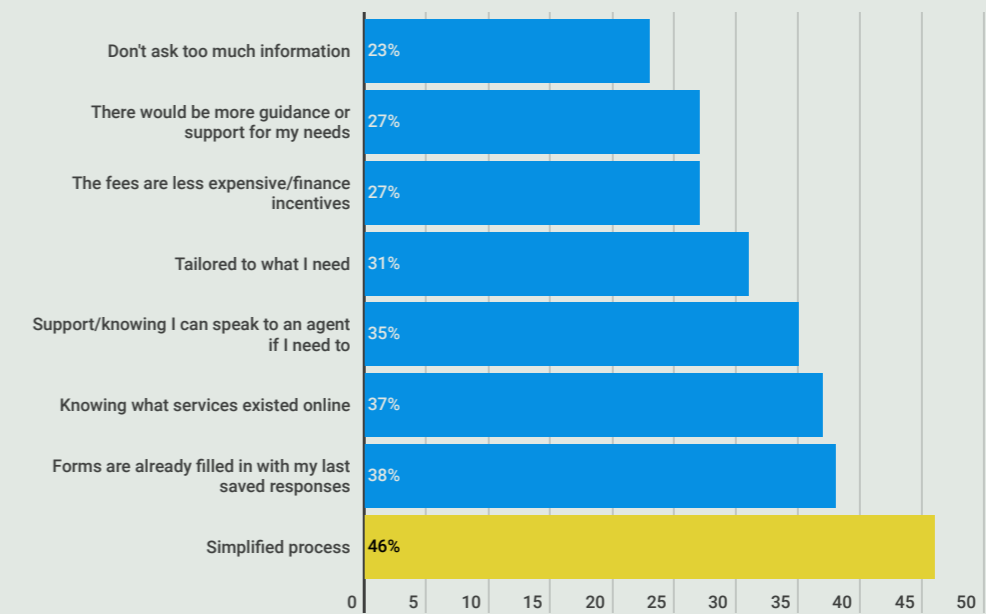
Notably, financial incentives are not a major driver of increased usage, with only 27 percent of users saying this would encourage increased use of digital services.

Whilst simplicity isn’t seen as a particularly strong benefit for those already using digital services, it is a significant factor to encourage greater use of online services.

Which of the following would most improve your experience?



Which of the following would encourage you to use more digital government services?





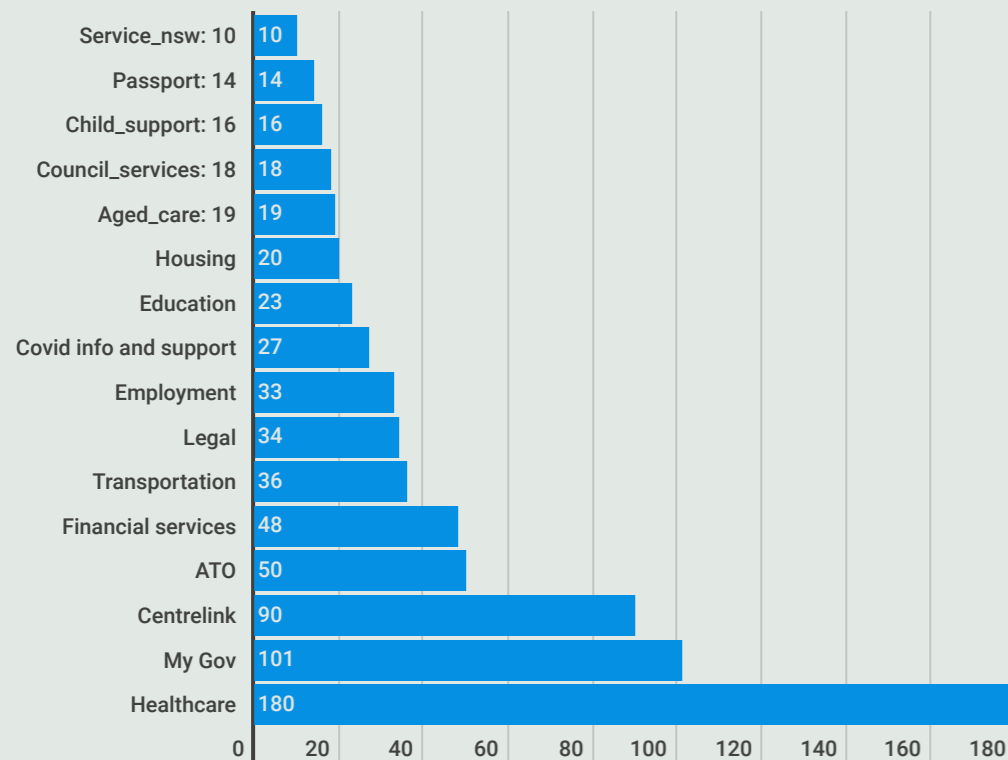
Scope, Analysis and Findings

Suggestions for Filling Gaps in Digital Service

In general, citizens are happy for governments to keep increasing digital service offers in all areas. The most suggestions for increased service offers were around health, Centrelink and ATO.

What other government services would you like to be able to access online?

*Top aggregated categories with a frequency count > 20



The majority of survey respondents were open to any or as many as possible services being made available digitally.

When asked for suggestions on where to fill service gaps, healthcare was suggested the most, especially elements including pathology, electronic health records and Medicare services.

My Gov and Centrelink specifically were called out as the next most common suggestions for improved digital services.

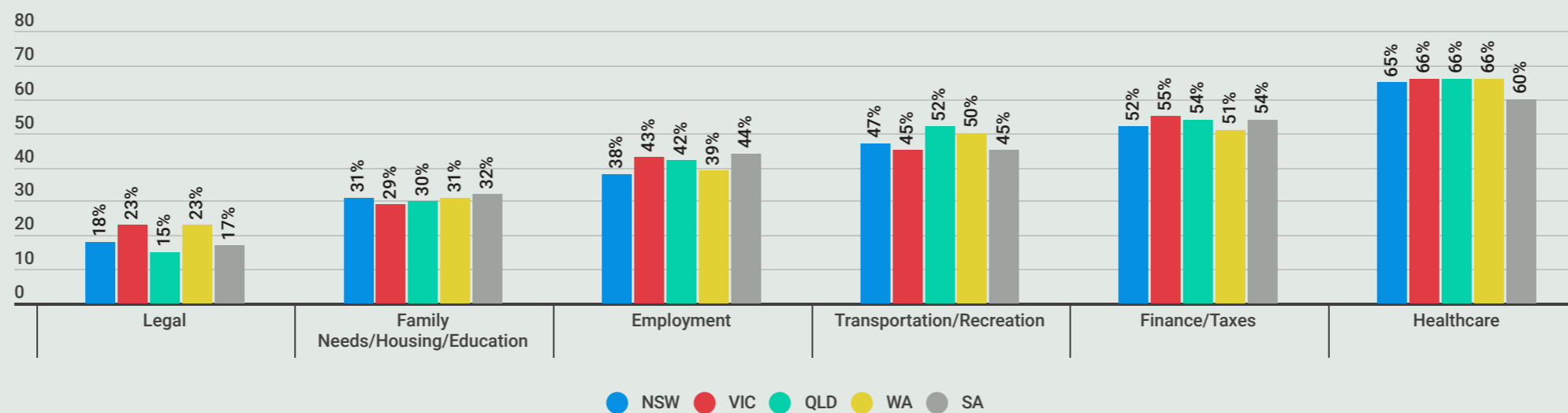
Other suggestions for expanding the digital service for citizens included online voting, real-time citizen surveys/consultations and digital identification/certification.

There were other suggestions for improving user experience in general, such as integration with Apple Wallet, showing the importance of integrating government with other services.

Inter-state Usage Comparisons

Digital service usage is broadly consistent across states. There are service areas with higher usage in some states compared to others— notably legal and employment services—which suggest opportunities to learn from best practices.

Use of Digital Services by state



Digital service usage is broadly consistent across states—all states have a usage proportion of between 88 percent and 90 percent except for South Australia (SA) at 85 percent.

Digital service usage by state varies a bit in some key service areas. For legal services, Queensland (QLD) has a 15 percent usage rate compared to 23 percent in Victoria, and employment-related services usage varies from 38 percent in New South Wales (NSW) to 44 percent in SA.

Confidence in the readiness of respective governments to meet digital needs over the next few years varies somewhat, from 78 percent in NSW to 69 percent in SA.

Inter-state User Experience Comparisons

User satisfaction is high across all states, although there appear to be more opportunities to learn from best practices in legal and family services from high-performing states.

Percentage of users who rate digital government services as 'Good' or 'Very Good' by state



When looking at satisfaction in digital services across states, there is consistency in key service areas including employment, finance and health. This is likely reflective of the fact that many key services in these areas are driven by Federal Government and are therefore common across states.

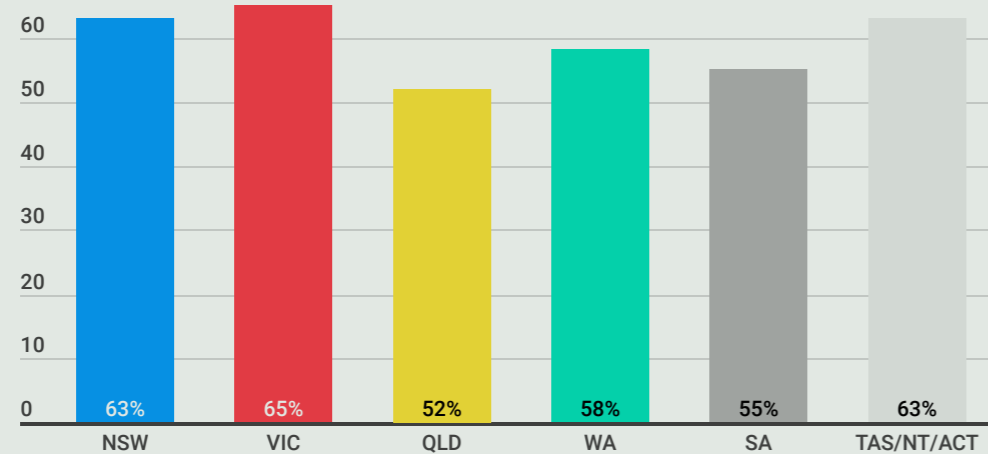
There are more material differences in other service areas, including legal, where 'good' satisfaction varies from 72 percent (SA) to 92 percent (in Western Australia), and family services, where 'good' varies from 91 percent NSW to 87 percent in QLD. This suggests that there are opportunities to learn from best practices across states.

Transport and recreation-related services were rated very highly across all states.

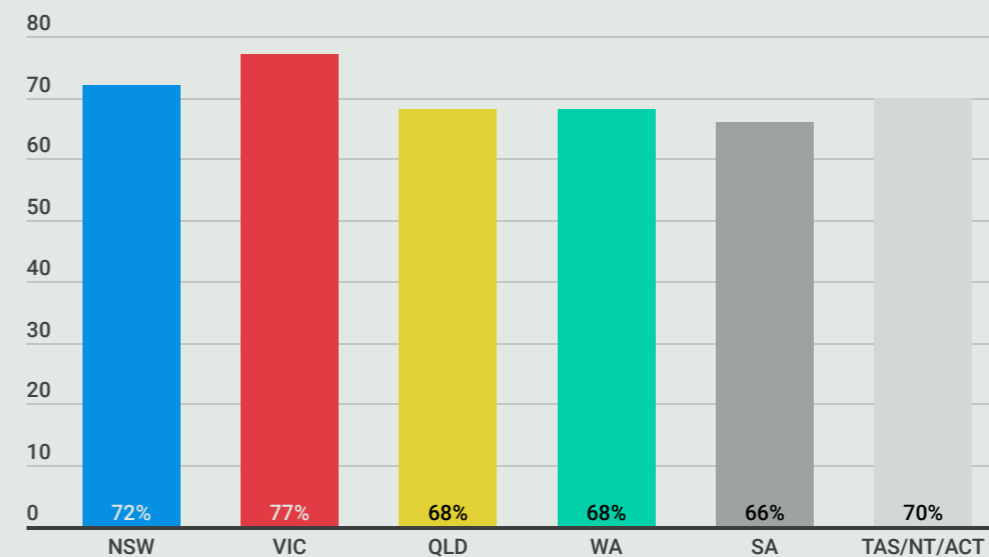
Impact of COVID-19 on Usage and Demand Across States

Those states most impacted by COVID-19 have seen the greatest proportion of new users in the last 18 months, as well as the highest demand for digital services.

Users in states who have used a government service for the first time during the pandemic



Users in states who wish the government had more digital services during the pandemic



First-time usage of government digital services was highest in Victoria (65 percent) and NSW (63 percent).

Demand for a greater number of services delivered digitally is also highest in Victoria (77 percent) and NSW (72 percent).

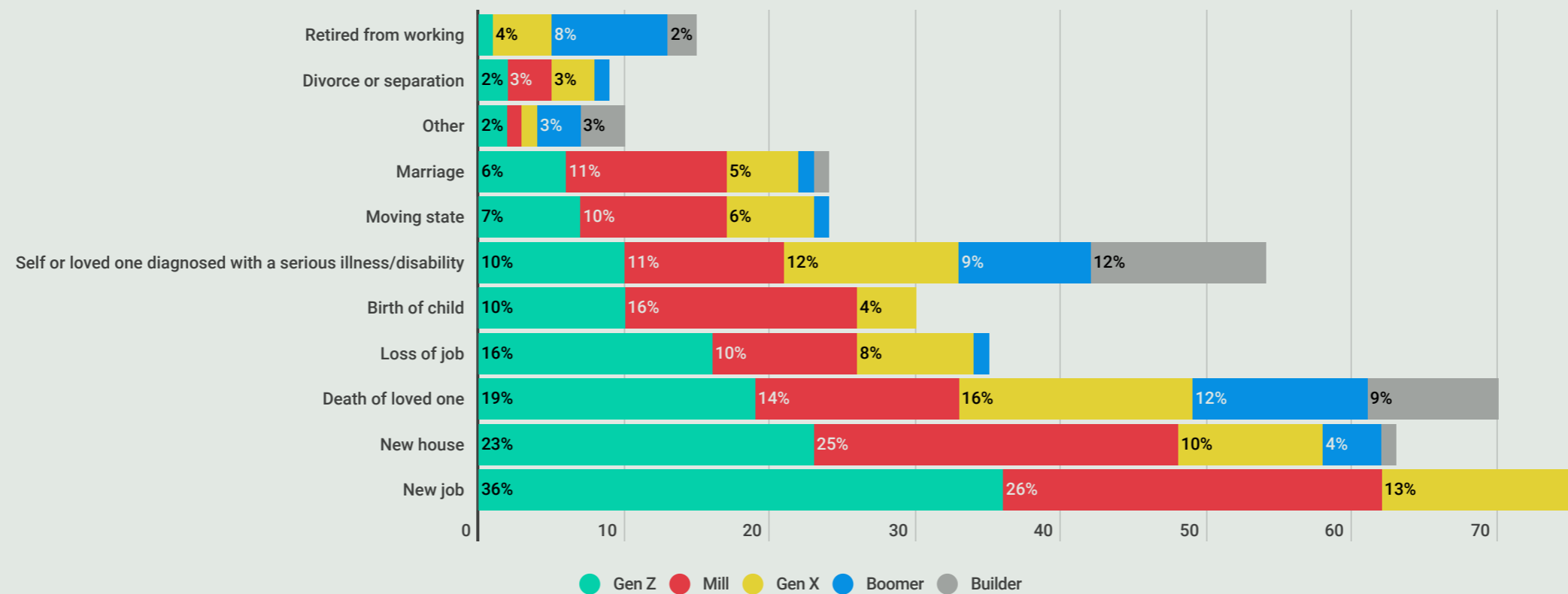
Given these states have been most impacted by COVID-19, in terms of number of cases and lockdowns, this suggests that the pandemic has had a significant impact on citizens' appetites and response to digital services.

Citizens in these states also have a higher opinion of their government's performance.

Citizens Experiencing Major Life Events

A significant proportion of Australians experience major life events each year. Of these, new jobs and new homes were the most common and especially experienced by those in Gen Z and Millennial age groups.

Have you experienced any of the following life events in the last 12 months?
Age demographic view



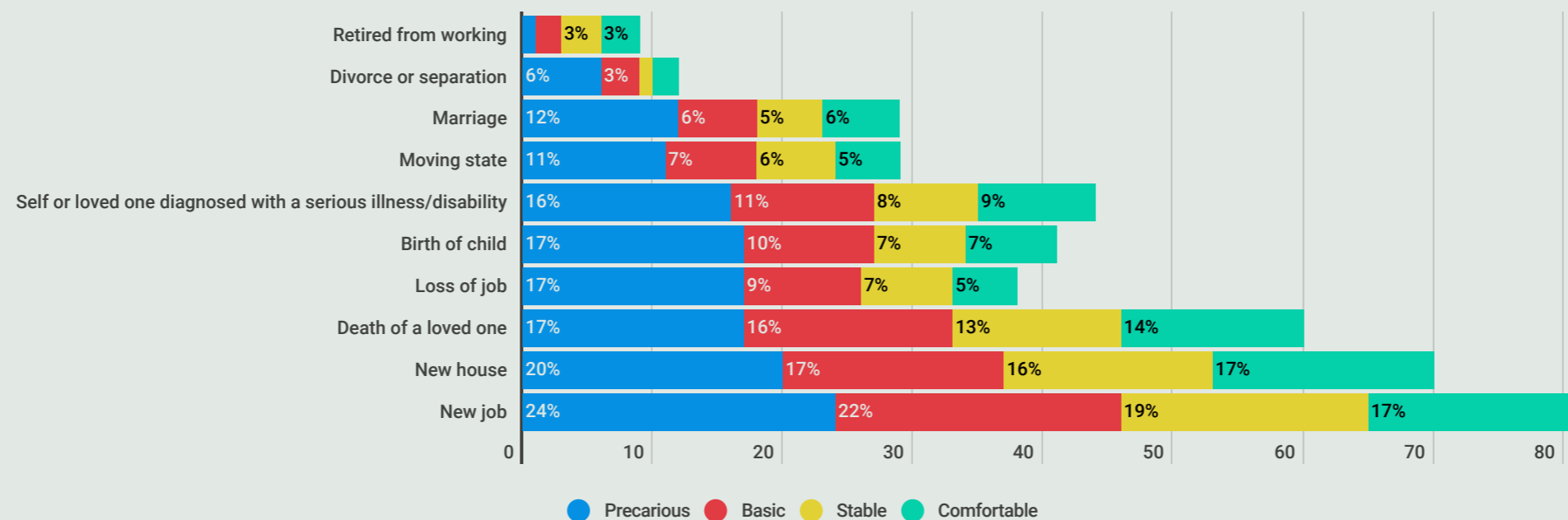
There is a large demand for life event-focused services across government, with 60 percent of Australians having experienced a significant life event in the past 12 months.

Those most likely to have experienced a life event are younger—Gen Z (75 percent) and Millennial (70 percent) vs Gen X (50 percent), Boomer (32 percent) and Builder (24 percent). This is driven particularly by events around new jobs and new houses. The death of a loved one and self or loved one’s serious illness or disability diagnosis are proportionately higher for older ages. This suggests opportunities to tailor and target specific services to some user groups.

Prevalence of Life Events Based on Financial Position

Those in precarious financial situations are likely to experience more life events. Whilst they are also more likely to find and use government digital services at these critical points, there is likely to be work required to support this cohort as offers evolve.

Have you experienced any of the following life events in the last 12 months?
Financial position view



Based on survey responses, in almost all cases, life events do tend to impact citizens in less secure financial situations, with retirement being the only event in our survey with higher proportions of stable or comfortable citizens reporting this experience in the last 12 months.

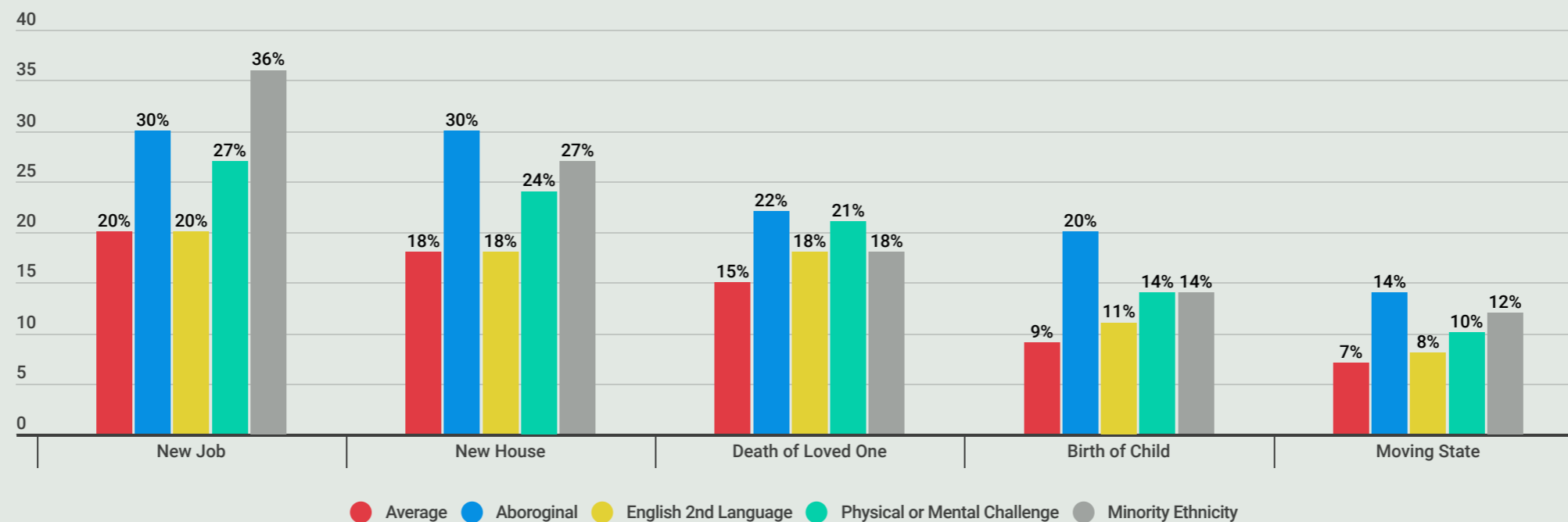
Loss of job is the life event most disproportionately impacting people in a more precarious financial position, but moving state, marriage and divorce are all twice as likely for people in a precarious financial situation than those who are in a stable position.

Those with precarious or basic incomes are more likely to use digital government services during a life event and generally find them useful. But given these groups are also more likely to have lower tech skills and be less comfortable with digital service innovations, work will be required to educate and support them as life event services evolve.

Experience of Life Events on Different Citizen Groups

Citizens from different ethnic groups or with physical or mental health challenges are proportionately more likely to experience many of the key life events, highlighting the importance of designing support and accessibility into these services.

Have you experienced any of the following life events in the last 12 months?
Specific citizen cohort view



Survey respondents identifying as Aboriginal, Torres Strait or Indigenous were likely to experience most key life events, including new job, new house, death of a loved one, birth of child and moving state.

Those with physical or mental health challenges are more likely to experience life events around new job, new house and death of a loved one.

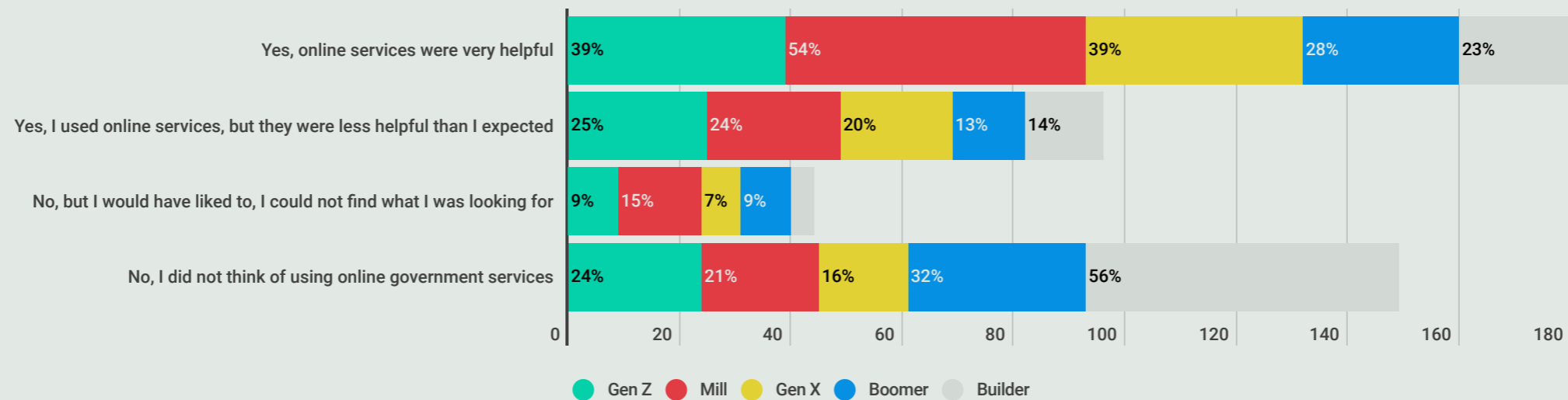
People from ethnic minorities are far more likely to experience new job and new house life events.

All these differences highlight the importance of building support and accessibility thinking into life event service design.

Citizen Experiences of Life Events Services

There is an opportunity for Australian governments to raise awareness and extend life service offerings to support citizens.

Did you use online government services related to this life event?
Age demographic view



Despite the large number of citizens experiencing life events, there is a significant proportion (32 percent) who were not aware of the services or could not find what they needed. These citizens are unaware of or unable to find relevant services at a key life event point.

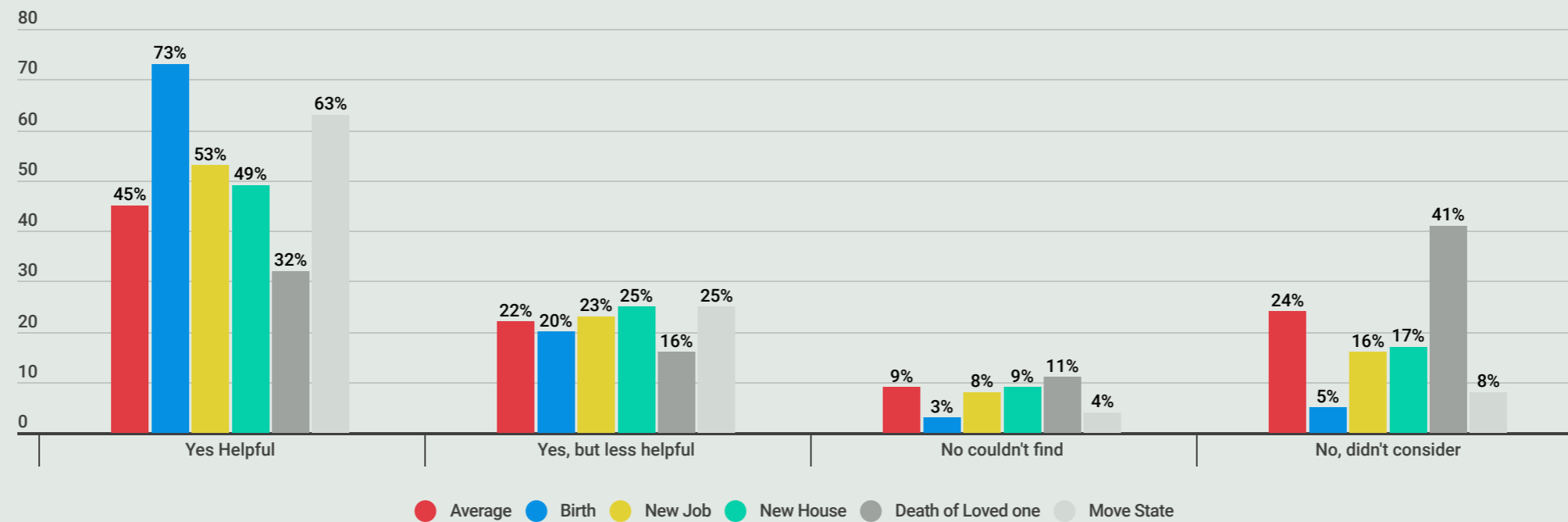
The Builder age category are most likely to be unaware of the service offers available at 56 percent of that cohort.

Millennials and Gen X were most likely to find life event services helpful, although 13 percent of Millennials also recorded that they couldn't find what they were looking for, suggesting opportunities for extending digital service offers in areas such as new job or new home.

Use and Usefulness of Support by Life Event Type

There is a material difference in the use and usefulness of life event services depending on the event itself. Based on survey responses, services around birth and inter-state moves are the most helpful whereas the biggest gap is seen around support dealing with the death of a loved one.

Did you use online government services related to this life event?
Life event type view



Citizens find life event services around births the most helpful, with 73 percent of respondents using digital services and finding them useful, followed by the support provided for those moving state at 63 percent.

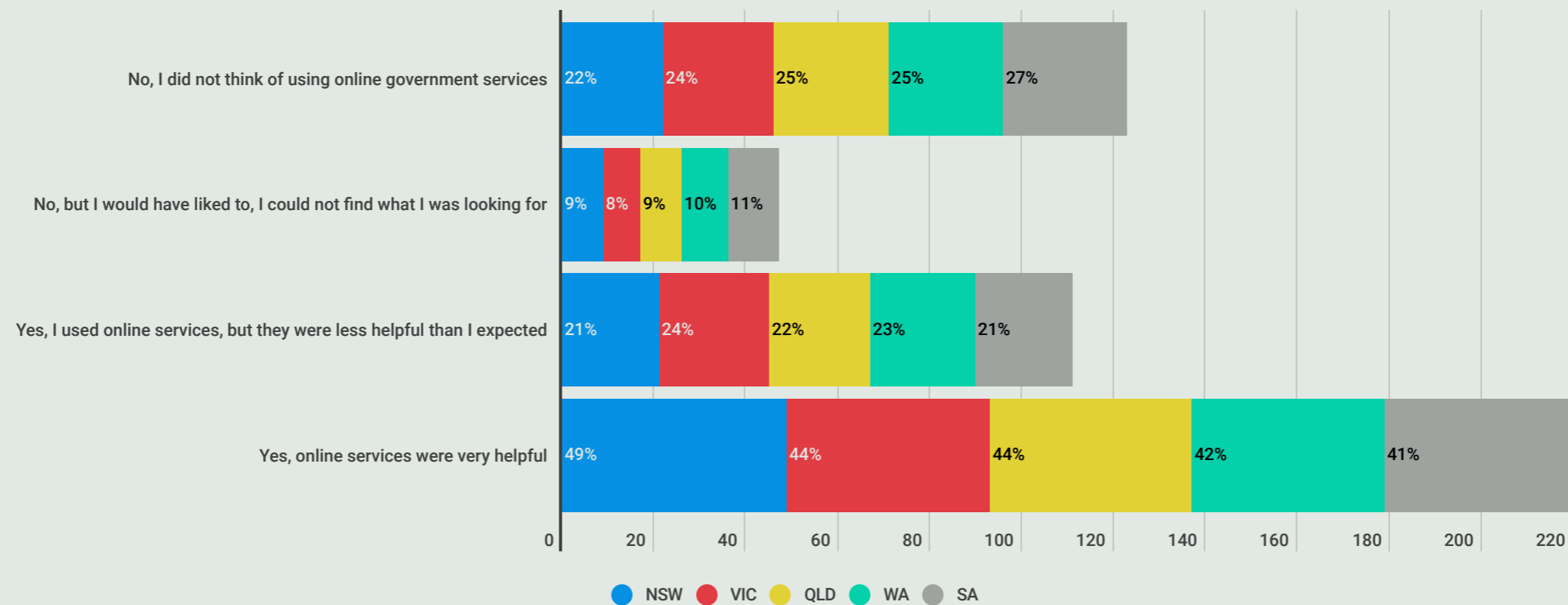
Life event services around new job and new house attracted quite a few users who wanted to use services and found them less helpful (at 23 percent and 25 percent, respectively).

Support services for those dealing with the death of loved one were the least considered by citizens, at 41 percent. This suggests governments need to publicise the additional support that has been created in this area.

Experience of Life Event Services Across States

Usage and usefulness of digital government life event services is broadly similar across states, with NSW slightly leading other states.

Did you use online government services related to this life event?
State comparison view



The highest level of usage and satisfaction with life event services was in NSW, where 49 percent of respondents reported using digital government support and finding it helpful. This could be reflective of earlier or greater investment in life event services in NSW.

Respondents across different states recorded similar levels of not being able to find the services hoped for, with WA and SA slightly higher at 10 percent and 11 percent, respectively. These states also returned the highest level of ‘not considering’ digital government support during a life event, at 25 percent and 27 percent, respectively.

Support for Different Applications of Artificial Intelligence (AI)

78 percent of Australians are comfortable when it comes to AI-generated and data privacy issues, including a significant percentage of those who do not support the concept of government.

83 percent of Australians are comfortable with a government website that remembers their last interactions (including name/services).

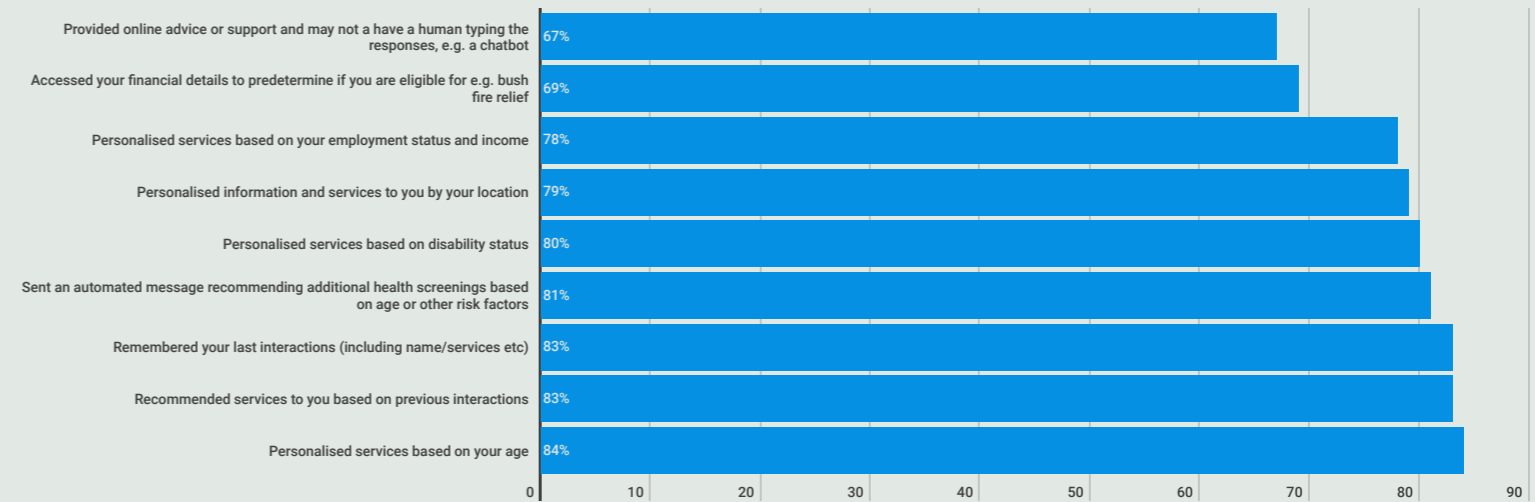
83 percent of Australians are comfortable with a government website that recommends services to them based on previous interactions.

78 percent of Australians are comfortable with a government website that personalises services based on their employment status and income.

Comfort levels are all significantly higher among:

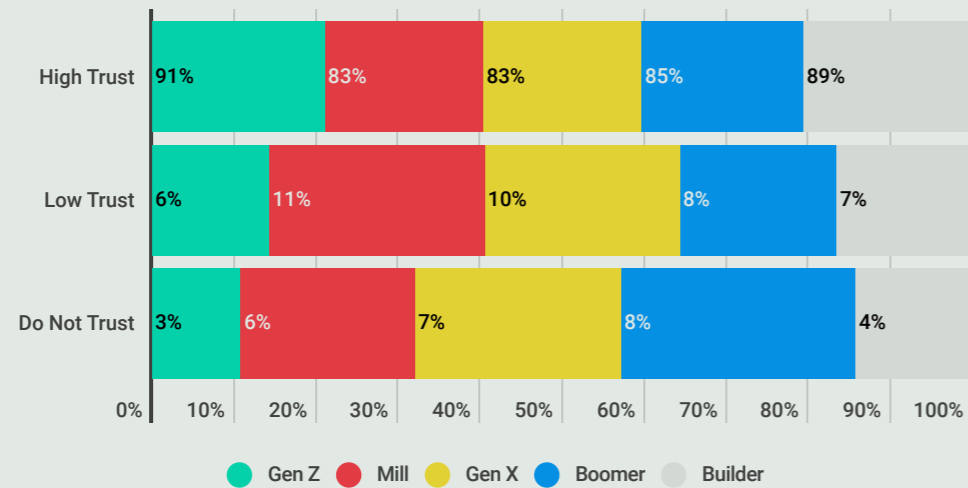
- Those who support governments (average 82 percent compared to 65 percent of those who do not)
- People with good tech skills (82 percent compared to 65 percent of those with no tech skills)
- Those with a household income of \$100k+ (83 percent compared to 76 percent of those with a household income of <\$100k.)
- Current users (81 percent vs 59 percent of non-users)
- Millennials (83 percent compared to 73 percent of Boomers and 69 percent of Builders)

Rate how comfortable you would be if a government website or app:

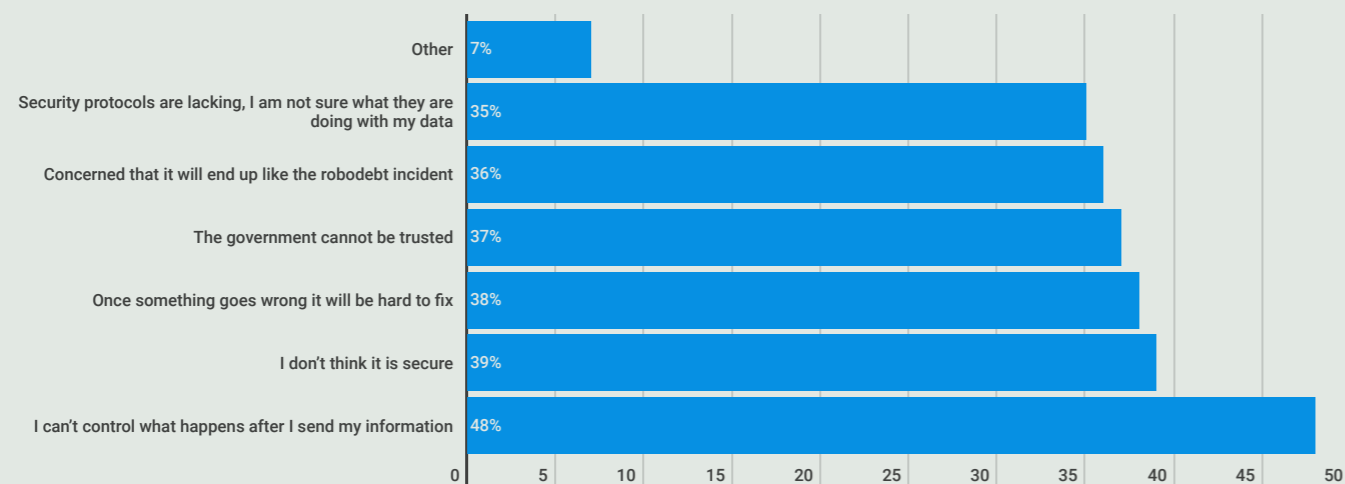


Trust in Government Around Digital Services

What level of trust do you have in online government services?



Breakdown of reasons for those who selected 'Do not trust online government services'



Trust in digital government services is high across the country; with younger and older age groups as the most trusting. The main barriers to trust are lack of control of information and security.

Overall trust in digital government services is a significant driver of comfort in innovations such as AI applications.

Trust in digital government services is high, with a total of 92 percent citizens trusting in the services.

From an age perspective, trust dips in middle age categories—for example, 7 percent of Gen X and 8 percent of Boomers do not trust government compared to just 3 percent of Gen Z and 4 percent of Builders.

The main barriers to trust in government digital services are lack of control of information (48 percent), concerns around security (39 percent) and ability to fix issues (38 percent). 'Robodebt' is still a concern for greater than a third of those who do not trust digital government services.



Prevalence of Mental Health Issues

57 percent of the population has sought treatment for mental health issues. Younger people, those in precarious financial positions and those who have experienced a major life event in the last year are more likely to have sought support.

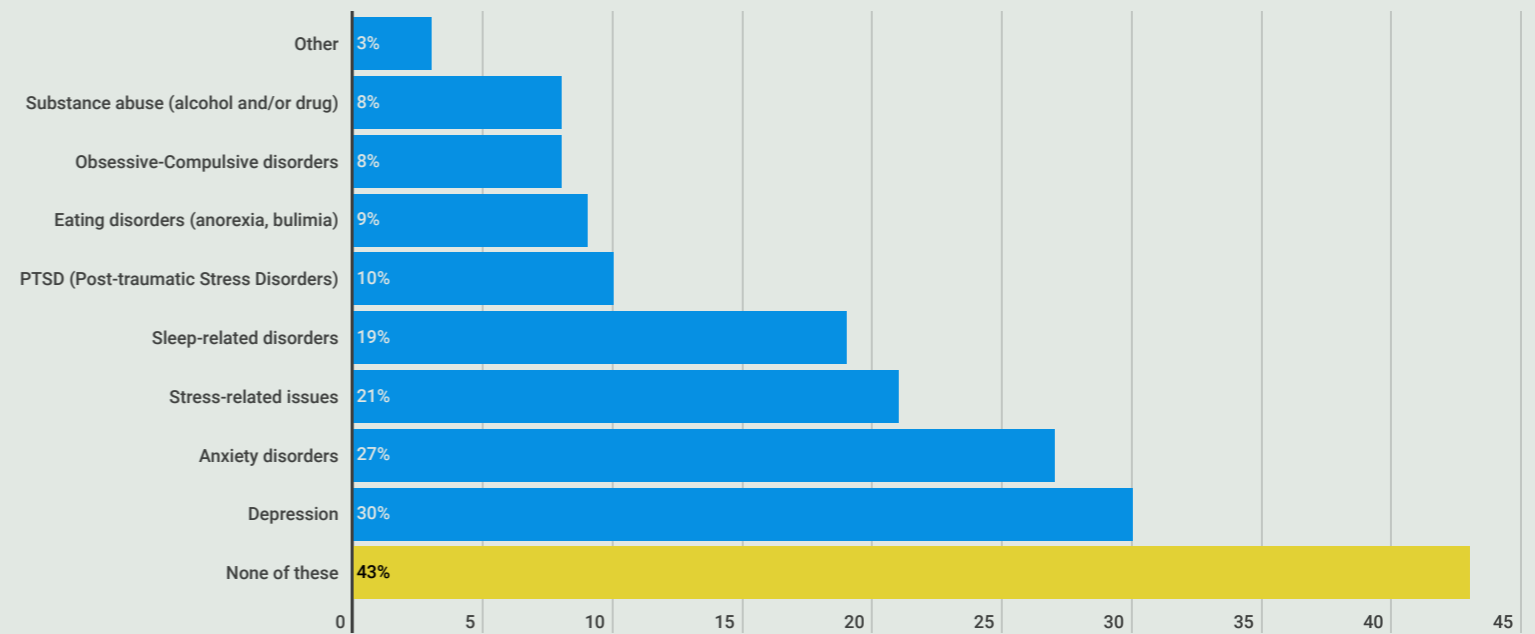
57 percent of Australians have sought treatment for a mental illness. Prevalence is significantly higher among younger age demographics.

The most cited conditions are depression, anxiety and stress-related.

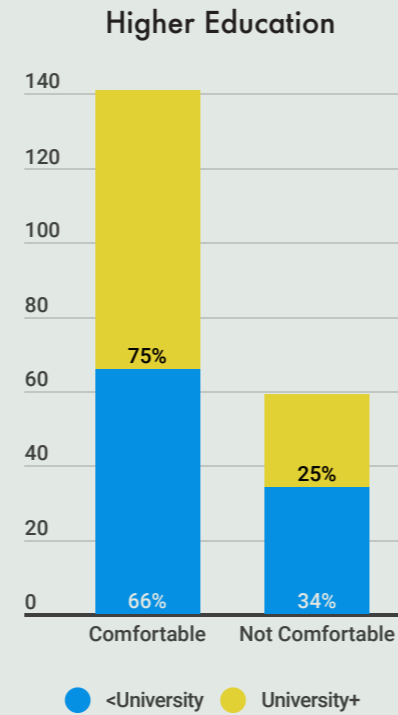
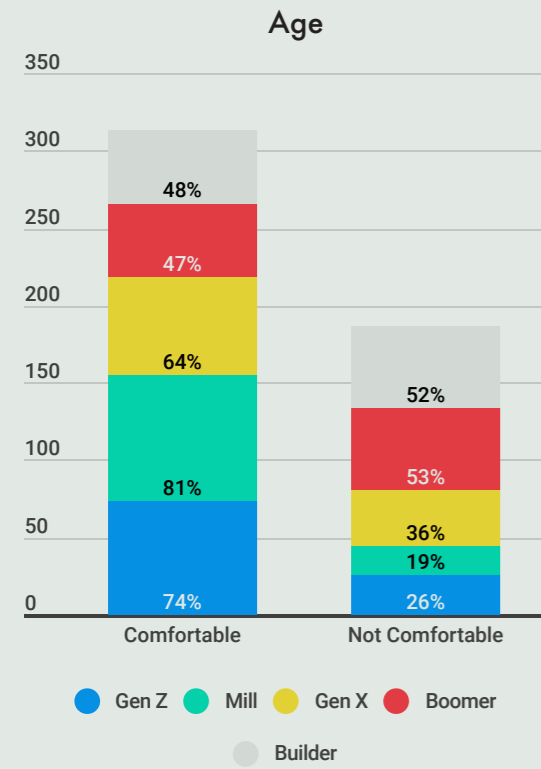
Those most likely to have sought treatment are:

- Those with precarious finances (79 percent vs 64 percent basic, 48 percent stable and 43 percent comfortable)
- Younger (Gen Z at 66 percent, Millennials at 64 percent and Gen X at 54 percent vs Boomers at 37 percent and Builders at 21 percent)
- Those who experienced a life event (68 percent vs 41 percent)

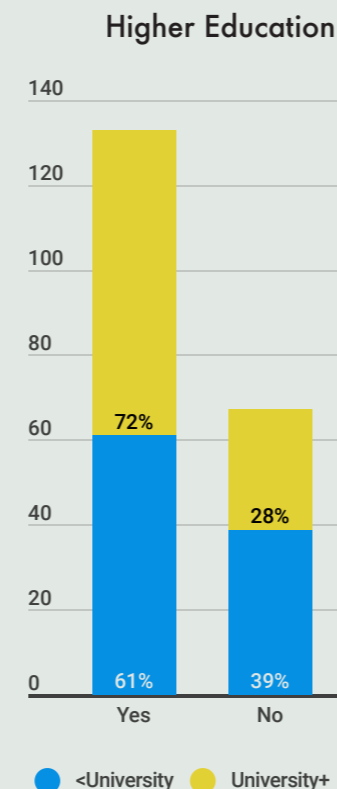
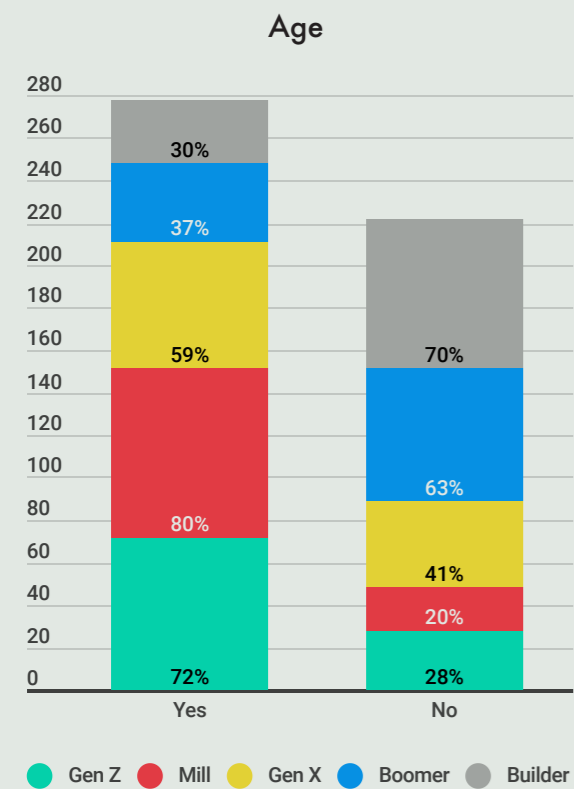
Have you every sought treatment for any of the following?



How comfortable would you be with online text or video based assistance with mental health counselling or a platform that connects you to a familiar platform?



Would knowing that the consult would be an online experience make you more likely to reach out for help with a mental health issue?



Scope, Analysis and Findings

Demand for Mental Health Digital Services

72 percent of those with a mental health condition say that an online consult for mental health would make them more likely to reach out for help.

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This perspective is notably higher among younger populations (who are also more likely to have sought treatment), with Gen Z at 72 percent and Millennials at 80 percent compared to Gen X at 59 percent.

Overall, 70 percent of Australians say they are comfortable with line text or video-based assistance with mental health counselling.

Comfort with digital support is higher (75 percent) among those with a mental health condition compared to those without (63 percent).



Digital Service Usage Within Indigenous Communities

People from Indigenous communities are higher users of digital government services overall. They also seek services more following key life events.

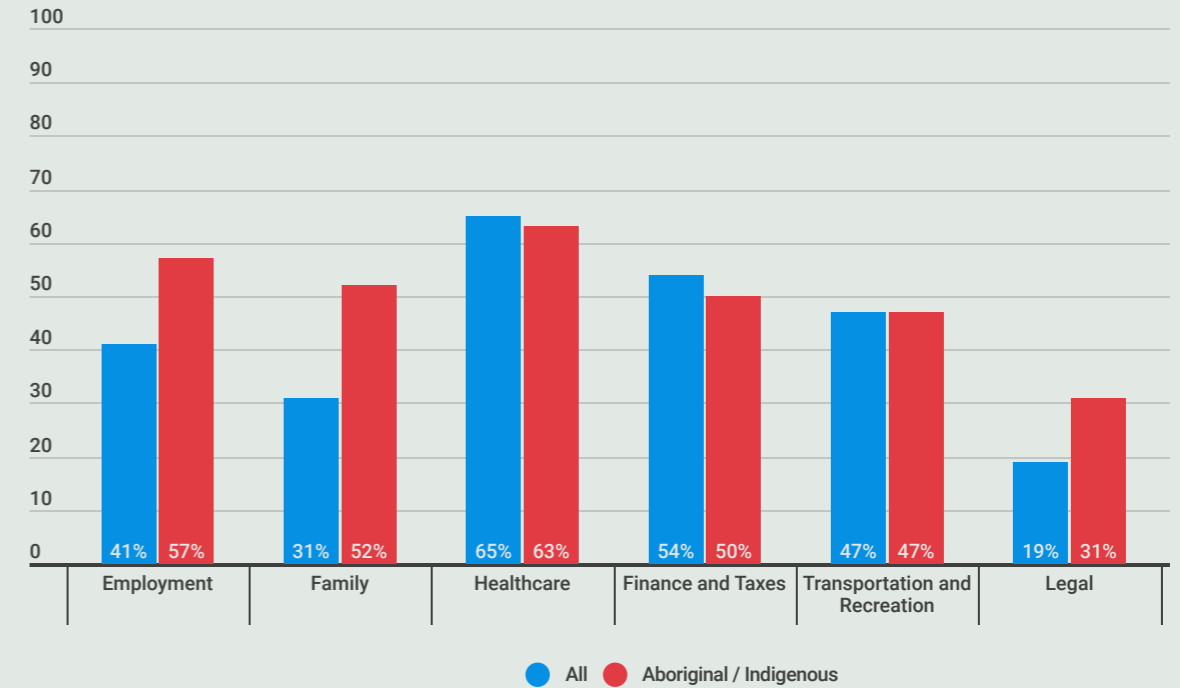
Aboriginal and Torres Strait Island citizens are higher users of digital services than the average population (90.8 percent compared to 88.3 percent, respectively). This is driven by usage employment, family and legal services.

People from Indigenous communities are more likely to have experienced a life event (e.g., 30 percent compared to 17.5 percent for new house, or 29 percent new job compared to 20 percent) and are much more likely to use online services for life events (77 percent compared to 68 percent).

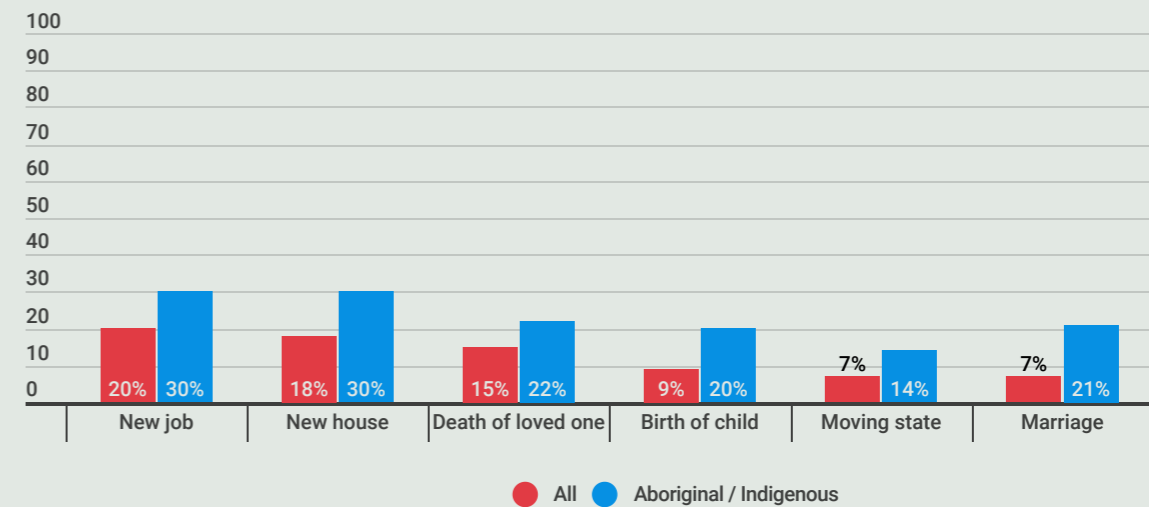
People from Indigenous communities are more likely to have experienced mental health issues and are also much more comfortable with online support for their mental health.



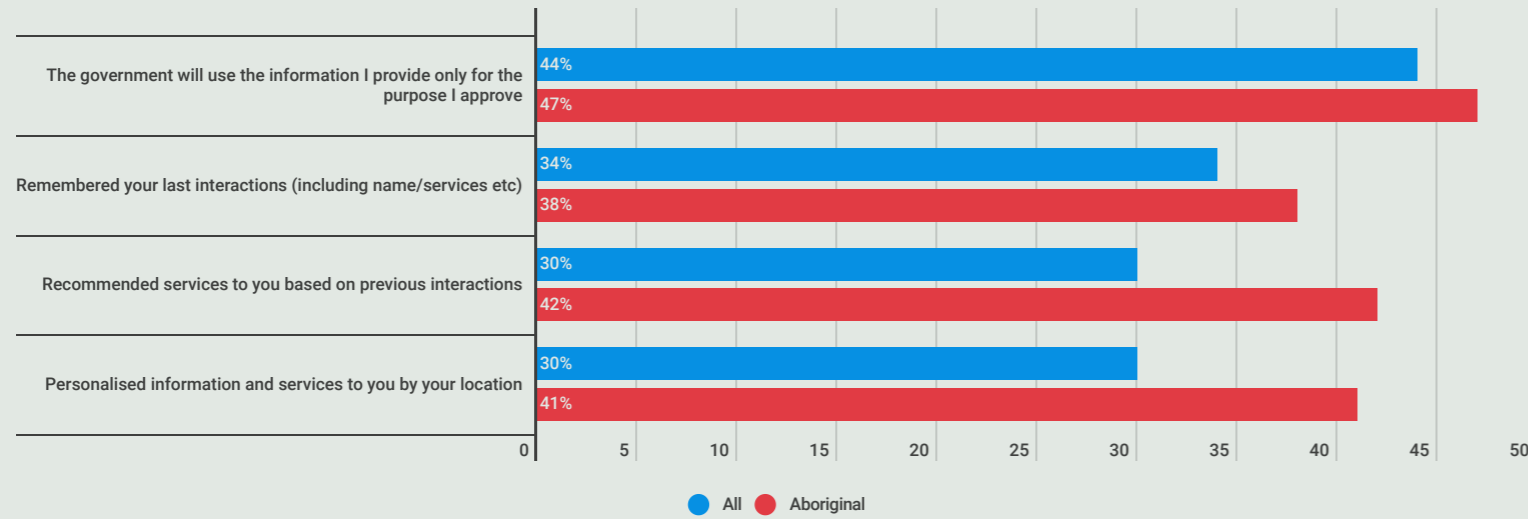
Aboriginal & Torres Strait Island & Indigenous use of Digital Government by service area compared to all



Aboriginal & Torres Strait Island & Indigenous experience of life events in last 12 months compared to all



Aboriginal & Torres Strait Island & Indigenous perspectives compared to all on comfort with AI services and trust in Government Digital Services



Perspectives of Indigenous Communities

Citizens from Indigenous communities are more open to AI being applied to their services and convey higher levels of trust in digital government services.

Overall, citizens from Indigenous Communities are more comfortable with AI-related service aspects. They are significantly more comfortable with personalisation by location (41 percent compared to 30 percent), and having services recommended based on their last interactions (42 percent compared to 30 percent).

This could be reflective of a higher degree of trust (47 percent compared to 44 percent).

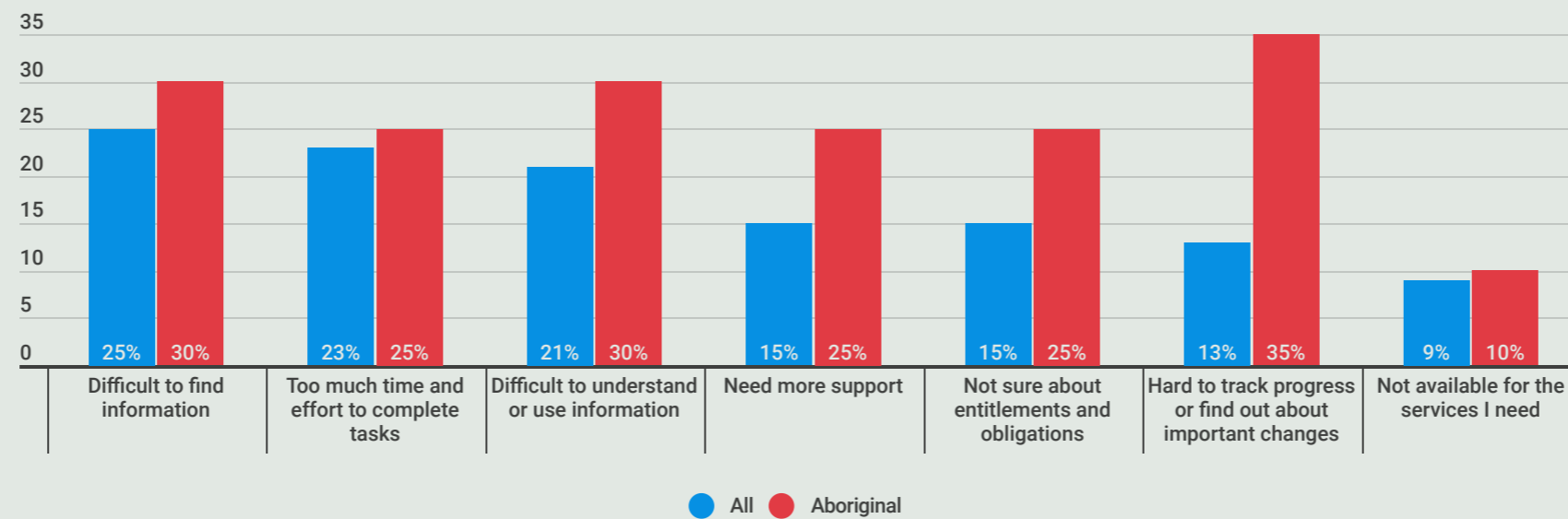
This suggests significant opportunities to innovate digital services for these user groups.



Support Requirements of Indigenous Communities

People from Indigenous communities value support in using digital services more and are significantly more keen to understand progress of changes to their service.

Aboriginal & Torres Strait Island & Indigenous compared to all on reasons for not using digital services



People from Indigenous communities self-assess as valuing support and guidance more in using digital services (25 percent seek more support compared to 15 percent average).

They are also significantly more keen to understand progress in service delivery or track key changes (35 percent compared to 13 percent).

This suggests key design features and service supports that should be considered for this user group.

Digital Service Experiences of Those With a Disability

People with a disability have a higher-than-average enthusiasm for digital services and are open to services being personalised based on their disability status. However, they are nearly twice as likely to not use digital channels because they don't cover the services they need.

Digital government service usage is slightly higher for those identifying as having a disability (92 percent) than the overall population (88 percent).

A higher proportion of people with disabilities prefer digital services because they don't like the way they are treated in government offices—26 percent compared to 16 percent.

53 percent of people with disabilities prefer digital because they don't have to talk to anyone, compared to 39 percent overall.

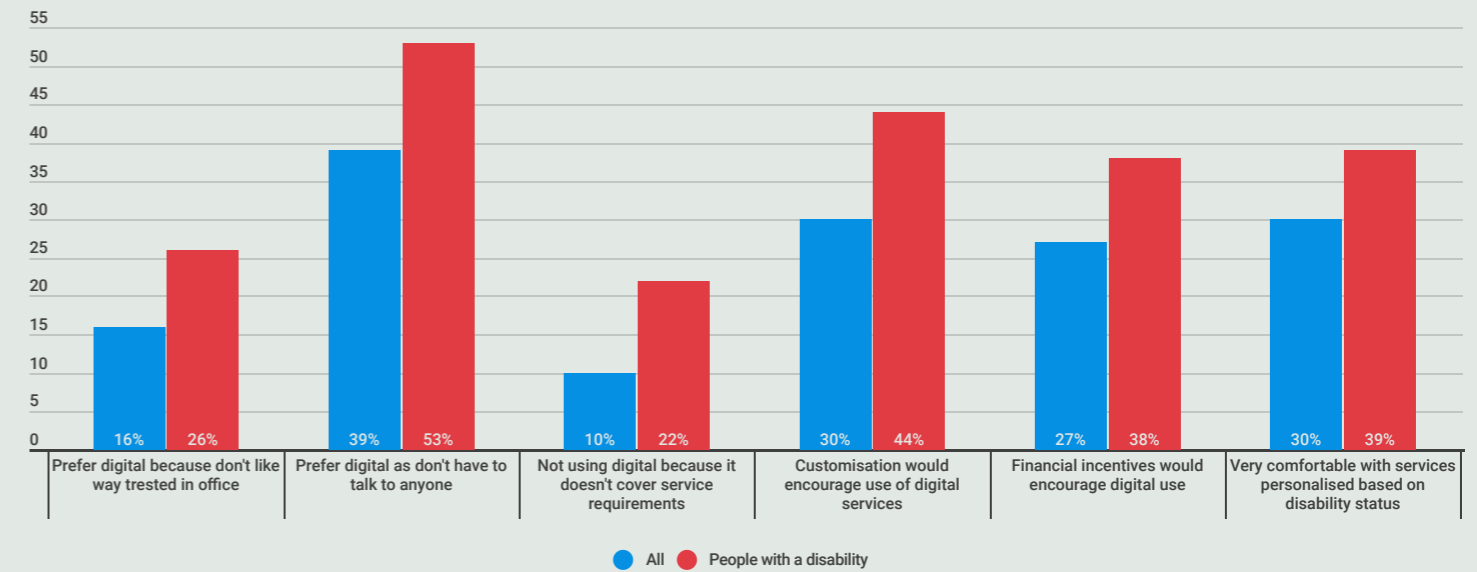
22 percent of those with disability are not using digital services because they don't cover the services they need, compared to 10 percent for whole population.

44 percent of people with a disability feel customisation would encourage use of digital services, compared to 30 percent of the overall population.

The influence of financial incentives also appears to be higher for those with a disability—38 percent compared to 27 percent.

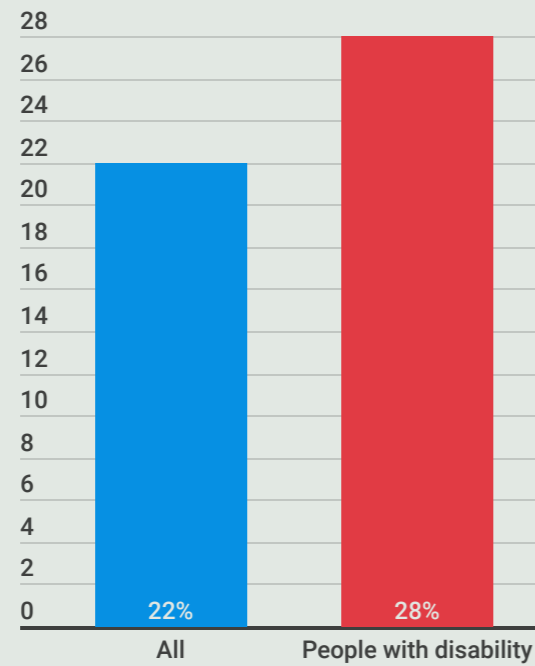
39 percent of people with disabilities are very comfortable with personalised service, compared to 30 percent of the overall population.

People with disabilities perception of digital services compared to all respondents (various questions)



Life Events for People With a Disability

People with disabilities experience of life events compared to all respondents



People with a disability are more likely to experience different life events and mental health issues. They are open to receiving support in these areas digitally but can't currently find all the services they need.

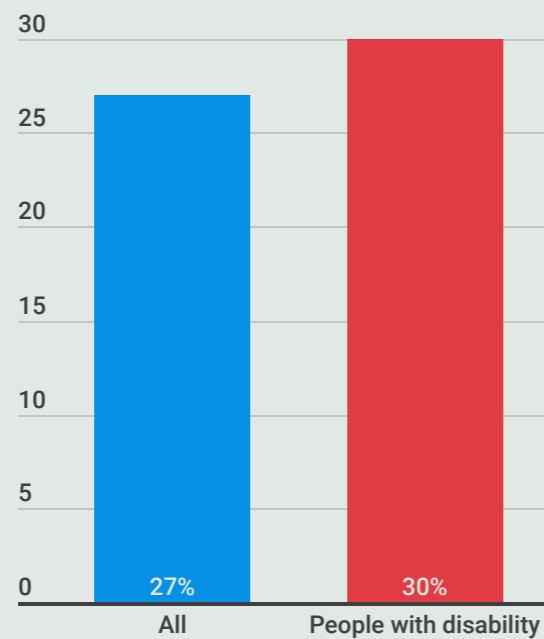
Those with a disability experience a much higher level of life events overall. Approximately 10 percent more have experienced a new job, new house or death of a loved one over the past 12 months.

However, a higher proportion of people with a disability using online services at a life event are not finding what they need—28 compared to 22 percent overall.

The reporting of mental health issues is considerably higher for those with a disability—only 13 percent reported no mental health issues in last 12 months, compared to 43 percent of the general population.

People with a disability who experience mental health issues are slightly more comfortable using digital services for support. 30 percent compared to 27 percent would definitely be encouraged to seek help if they knew digital support was available.

People with disabilities mental health support compared to all respondents



Digital Service Usage and Experience for Those Living in Rural Areas

People living in rural areas appear to be more reluctant users of digital services. They are less likely to engage and less enthusiastic about the benefits, suggesting the need to engage and build trust with these communities if digital is to help provide a consistent service across the country.

People living in rural areas are lower users of digital services overall and are considerably less likely to use digital in some service areas (e.g., over 10 percent lower for health or financial services such as ATO).

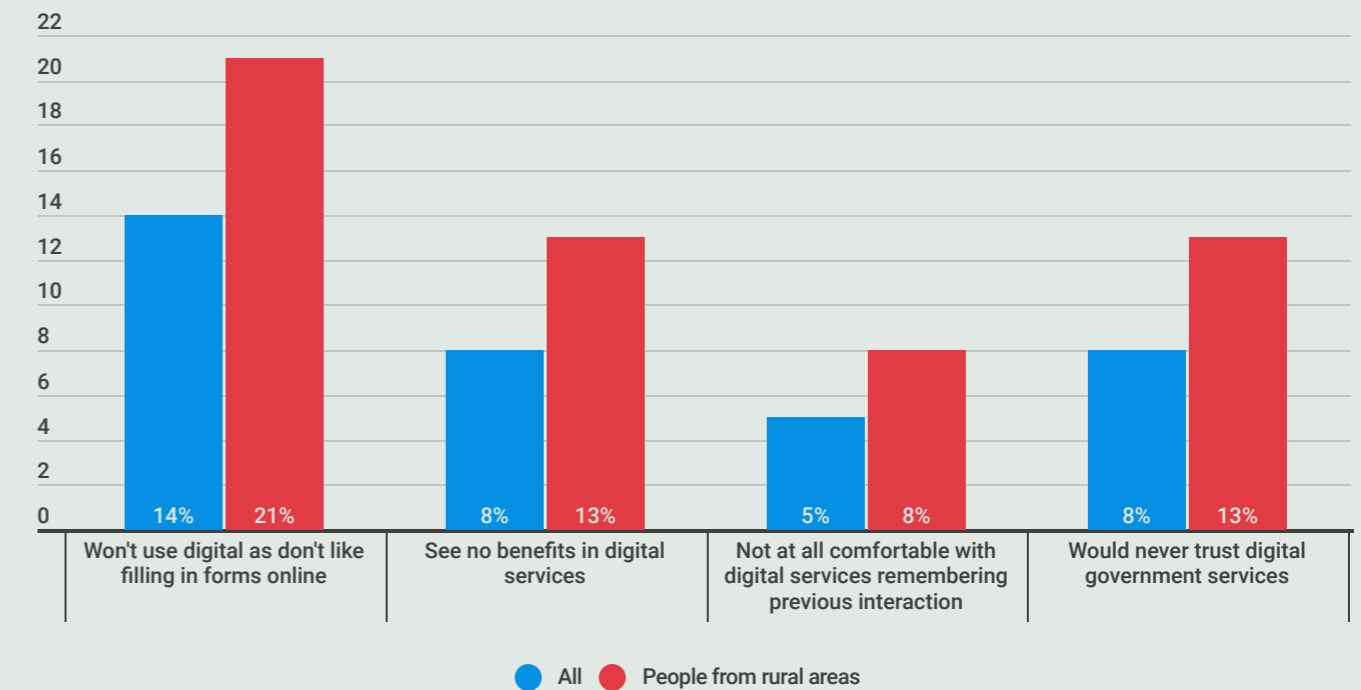
21 percent from rural areas don't like to fill in forms digitally (i.e., prefer other channels), compared to 14 percent of the whole population.

A higher proportion of people from rural areas feel no benefits in digital services (13 compared to 8 percent overall).

People from rural areas are slightly more hesitant on AI—8 percent are not at all comfortable with digital services remembering previous interaction, compared to 5 percent overall.

People from rural areas also show lower levels of trust in digital government services—13 percent reporting they would never trust them, compared to 8 percent overall.

Perceptions of digital services of people living in rural areas compared to all respondents (selected questions)





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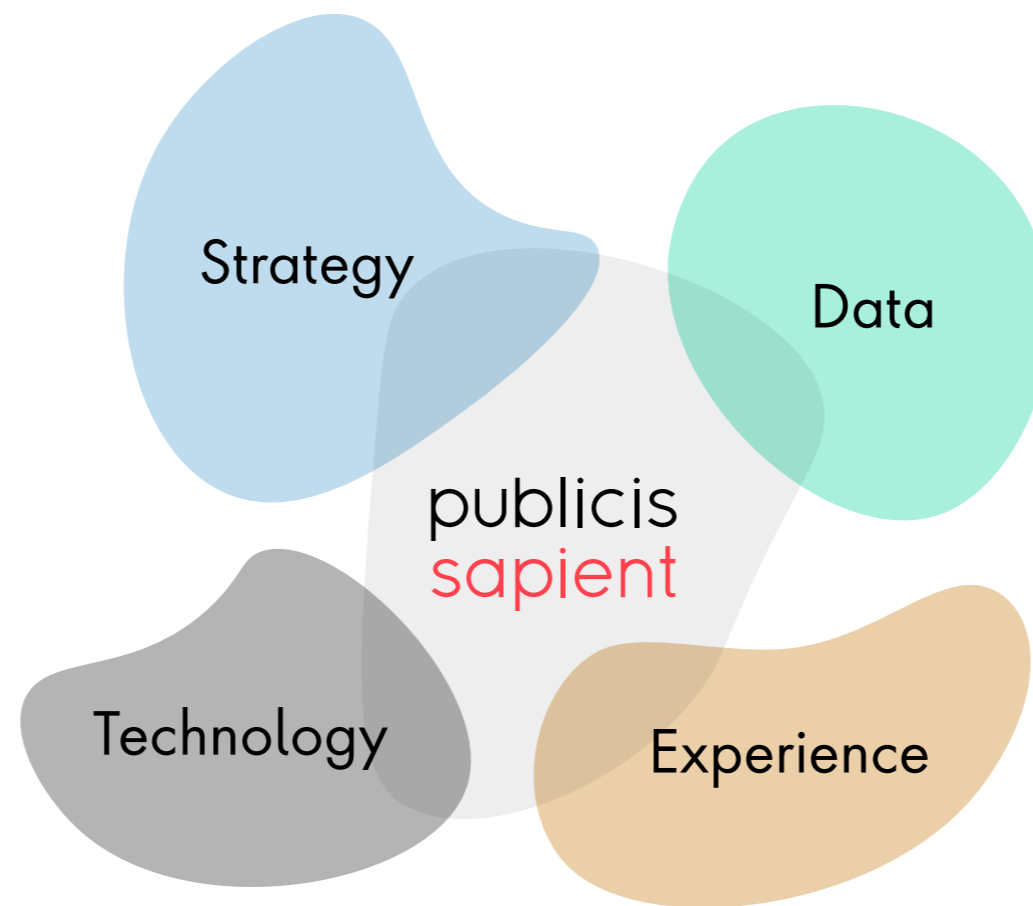
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- Health
- Public Sector
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- Transportation & Mobility
- Travel & Hospitality



1
Company

50+
Offices globally connected

20,000+
Passionate people

30+
Years of customer innovation

We've been digital from our inception in 1990.

We have successfully delivered 2000+ large-scale innovation projects for major multi-nationals and government organisations.

- We have a history of delivering digital firsts:
- Launched first ever Internet Banking
 - Launched first ever Auto ID account opening

Customer experience is at the centre of everything we do