IT Trends Survey
Mobile access for citizens and employees

In association with Socitm Gold Partner

VERISEC
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The survey

We identified six key areas of technology opportunity now and in the future in the results of the 2014 Socitm IT Trends Scoping Study:

1. Public service networks
2. Cloud computing
3. Information management and exploitation
4. Shared ICT
5. Mobile access for citizen engagement and employees
6. Infrastructure refresh, e.g. to better support new/re-designed service delivery models

Socitm and others are already active with the community addressing current and future public service networks-related matters.

The other key areas have been targeted for follow-on ‘deep dive’ surveys.

This publication reports the results of a deep dive into mobile access for citizens and employees in the Socitm community as at Summer 2015.

Socitm Research
August 2015

Profile of respondents

<table>
<thead>
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<tr>
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<td>Supplier Organisations</td>
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<td>Passenger Transport Executives</td>
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<td>Tourist Agencies</td>
<td>1</td>
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<td><strong>Total</strong></td>
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</table>

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Introduction

A recent report from Ofcom (6 August 2015) underlined the significance of mobile access to online services today:

- “Smartphones overtake laptops as UK internet users’ number one device.”
- “Superfast 4G is helping change the way we shop, bank, watch TV and communicate.”

Ofcom reported that 66% of people now own a smartphone (39% in 2012) and 33% of internet users see their smartphone as the most important device for going online (22% in 2014). Looking more closely, smartphone owners make up 90% of 16-24 year olds and 50% of 55-64 year olds – the latter more than doubling from just 19% in 2012. Ofcom ascribe these surges to take-up of 4G mobile broadband: “subscriptions have leapt from 2.7 million to 23.6 million by the end of 2014.”

For Socitm members, the increasing requirement for mobile access by both citizens and employees is evidenced both directly by the data in this Socitm survey and indirectly by Ofcom’s observations that “at least one 4G mobile broadband service is now available to 89.5% of UK premises”. Furthermore, Ofcom rules mean that 98% of premises will have an indoor 4G signal from at least one operator by 2017. So, more than ever, the safe assumption for the future is that most citizen-related interactions with Socitm members’ online services will be via mobile devices of one kind or another.

The future is not so clear in the case of employees in Socitm members’ organisations. As in many other aspects of the use of ICT today, there seems to be a lag between what is expected and catered for in the corporate space compared to the faster, more agile general consumer one.

Corporates seem to be relatively more conservative, perhaps reflecting the fact that most corporate activity still takes place within offices or other well-bounded corporate network places. A recent article1 noted that, “just 13% of companies [in the UK] actively encourage people to work anywhere on any device, one of the lowest take-ups in the world. We are behind Russia, India and China. In the United States, half of workers are given the authority and tools to work flexibly.”

Socitm’s own benchmarking data from 2014 combined with interim results from the 2015 groups indicate that Socitm members’ organisations are in fact ahead of the UK averages here for all have some degree of flexible/remote working arrangements in place. Their median percentage of agile workers as a percentage of all ICT service users is 28%, with first and third quartile values of 13% and 37% respectively.

In this survey report we do a deep dive into various aspects of mobile access for citizens and employees. We hope you will find it informative and useful.

[1] Data quoted in a Polycom commercial feature article in the raconteur.net report, “Enterprise mobility and collaboration”, 4 August 2015. Other research in the same report stated that, “at least one third of all employees in businesses in the United States and Europe are considered ‘virtual’ employees, meaning they work from home, the road or a satellite office most of the time.”
Mobile access for citizens and employees is naturally dependent upon mobile connectivity options wherever they happen to be. Although rollout of 4G services is advancing rapidly, survey respondents report that coverage by mobile data services from the telecommunications companies is still far from universal. They say 20% of areas still lack even 3G coverage. As an alternative, nearly 70% of respondents say there is free Wi-Fi provided in selected public service locations, but only 8% report universal availability from these places. Commercial premises, e.g. coffee shops, pubs, restaurants and hotels, are the largest providers of free public Wi-Fi services in their areas instead. Local authority provision comes second, above domestic Wi-Fi piggybacking in third place. With 4G coverage expanding and widespread commercial interest in providing free Wi-Fi to encourage customer spending, it begs the question whether the cost of additional local authority provision of free public Wi-Fi is justified today, save in ‘not spots’ where commercial services are not justified or mandated.

Probing further into public provisioning today, when asked if their organisation provided any apps for mobiles/smartphones, 52% of those who replied to the question said yes. The leading service functions for which mobile apps are produced are recycling and refuse, arts and leisure, housing, parking and travel. Exploitation of device location sensitivity by these apps appears to be relatively muted (19% of respondents confirming their apps use it, while 25% of respondents “don’t know”). The apps themselves are produced by both commercial organisations and in-house development in similar proportions (based on a small number of replies).

The questions on usage and monitoring of mobile access for citizens produced some concerning results:

- Despite an average of 40% of visits to organisations’ public facing websites originating from mobile devices², respondents report that provision of mobile access to online services is only moderately strongly driven by citizen demand and, where mobile access channels are provided, approximately 30% of respondents don’t measure or monitor citizen usage of mobile access, or don’t know whether they do. Furthermore, 38% of respondents reported collecting no customer experience feedback at all, and a further 22% didn’t know whether they had or not.

These are surprising results given the expectation also reported that the volume of mobile access will significantly increase in the next year, and that developing mobile access to services is important for organisations’ plans for coping with austerity.

- When asked about the extent of management support for investment in mobile access, the picture is mixed. A relatively small proportion of the total of respondents have strong or total commitment, while the majority are spread over the range covering only weak to moderate support. With a pattern of support like this, the somewhat poor outcomes for attention paid to getting customer feedback and monitoring customer activity generally are perhaps unsurprising. Clearly there is scope for ICT managers to alert service and top management colleagues to these changes if they are not aware from their own experience.

[²] Separate information corroborates this result. Socitm’s Website Performance Service data indicates that, by the end of 2014, 42% of visits to council websites were made on mobile devices (tablets as well as smartphones) and that this is steadily rising. [Socitm, Better connected 2015 report]
On local citizen accounts and authentication:

- A good majority of respondents have citizen account capability now or intend to do so in the future.

- When asked about the current means of authentication for citizen access, 41% said that they do not authenticate citizen access; the remainder are using or intend to use a variety of means, including use of GOV.UK Verify or its commercial alternatives, or a form of citizen/personal account directly with their organisation.

On employee access:

When the focus is narrowed to access to internal systems by employees from mobile devices, as with citizen access the overall picture is not particularly reassuring.

- First, the percentage of employees provided with mobile access facilities ranges widely from a few percent to more than 80%, with two peaks in the distribution around 20% and 50%. (Separately, Socitm’s own benchmarking data from 2014 combined with interim results from the 2015 groups indicate that the median percentage of agile workers as a proportion of all ICT service users is 28%, with first and third quartile values of 13% and 37% respectively.)

- But, despite widespread provision of mobile access, some 67% of the organisations surveyed do not know what percentage of employee access to internal systems actually originates from mobile devices. Notwithstanding this result, a good majority of organisations still reported that they anticipate that the volume of mobile access to internal systems by employees will increase in the next year. Of those who do monitor employee access, the majority of employee access to internal systems appears to be around 10-15% of all accesses.

- A variety of mobile device types are supplied to staff: Apple and Windows are the leading choice of tablets, whilst Android and Apple are the most popular smartphones. A good number of respondents report that their organisation uses mobile device management technologies – Airwatch and Mobileiron leading here – and approximately 60% are planning or already deploying mobile ID or mobile tokens to replace alternative authentication methods.

- Public sector network code of connection constraints have been responded to by combinations of locking down end-user devices (60%), thin clients (44%) and walled gardens for PSN transactions (32%).

Conclusions

Most survey respondents expect the use of mobile access for citizens and employees to grow in significance, yet many appear to have this expectation in the absence of evidence of citizen feedback or demand and, often, low levels of monitoring of mobile access to services by either citizens or employees. In a time of public sector austerity and a focus upon ICT systems meeting user needs as a fundamental design principle, absence of measurement and monitoring systems to help justify investment and evidence service quality and relevance is not good practice. There appears to be much room for improvement in these respects.
Socitm and survey partner, Verisec, discuss the survey findings

*Johan Henrikson, CEO of Verisec, comments on the report ...*

**Question: How do the results in the report align with your own market analysis of mobile trends?**

We see a strong trend in the adoption of mobile access on a global level which is reflected in this deep dive report. The fact that the trend is so strong is a combination of factors and that it is driven from both the users and the organisations. Since mobile access is seen as strategic in terms of coping with austerity it is good news that corporate senior management supports this investment. Mobility enables cost savings, improved efficiency and a better user experience and the drawbacks are few and far between. Of course as an IT-security company we have identified a number of security issues around the mobile platform, which in my mind is one of the biggest challenges in the deployment of mobile services.

**Question: Apart from the security issues, what other challenges have you identified?**

Mobile access is inherently dependent on mobile access. As the report shows, 20% of areas are lacking 3G coverage which of course is a natural barrier to the universal adoption of mobile services, especially in rural areas. But with rollout of 4G service progressing rapidly this will provide an additional driver for the adoption of mobile access based access. In some cases mobile access is a requirement for the services to operate, but in some cases mobile applications can do the job off-line and then sync whenever mobile access is provided. From our perspective, providing solutions using the mobile as an authentication device, we have had to take this into account and offer both an offline and an online version of the authentication app. Public Wi-Fi is of course adding more connectivity, however there are other security challenges when transferring data over a public Wi-Fi compared to 3G/4G networks which may make this alternative less attractive for some services if proper security measures are not implemented.
Question: What is your view on mobile apps versus mobile interfaces on websites?

We are aware of the fact that in some instances advice is against the use of mobile apps in favour of mobile web interfaces. Up until now it has been a relevant recommendation in many cases as the mobile platform inherently has a low level of security. However, with security tools that have been developed in recent years it is now possible to shield apps and encrypt the communication such that the mobile app/service can be considered secure even if the platform it relies on is not. From a user and functionality point of view, native apps are superior even compared to the best of web interfaces and I think we will see a shift towards more native apps in the future. As mobile becomes more important in accessing information it will also become more important to have a strategy for adapting the content to the mobile platforms represented in the user community.

There is a certain uncertainty in the study related to the proportion of internal systems accessed that originate from mobile devices. As we see more native applications for various functions, we would expect this to be a more common method of access. This trend is underlined by the study in that respondents expect the volume of mobile access to be on the rise, especially as the security tools become more widely used.

Question: What trends do you see in terms of mobile app services?

We are very much in the first generation of mobile applications. The types of functions provided by the application are fairly basic today, focused in areas such as recycling and refuse, according to the report. Over time we would expect that functions that are inherently more sensitive such as benefits, children and families or education will be more represented. As we see the second and third wave of mobile applications being developed with more features such as geolocation, camera, input from wearables etc. we will also see an increased adoption of the native interface.

Question: What is your comment around mobile access and remote working?

The answers in the report and our experience from the market indicate that the past 5-10 years has seen a steady increase of number of users allowed mobile access. We would expect these percentages to increase over time in conjunction with new services brought on-line that increase the scope of mobile access use within the user community.
It will become increasingly important to have a general platform for authentication that can provide flexibility in terms of security posture, but that also supports the variety of user groups and applications that are being launched. Providing bespoke methods of authentication for different groups will have an adverse effect on the potential savings provided by the self-service/automation benefits provided by the application. Since mobile access is considered important in coping with austerity, it would be surprising if citizen self-service did not increase. With increased services provided to the general public, identifying the citizen in a secure way will be part of this equation.

The fact that it is early days gives an opportunity to plan ahead in terms of the platforms adopted for identifying the various user groups including citizens.
Verisec is a company on the cutting edge of digital security, creating solutions that make systems secure and easily accessible. The company provides a wide range of products and services within its two areas of business: Digital Identity and Information Security. Verisec has global distribution and operations in Stockholm, London, Belgrade, Madrid, Mexico City, Dubai and Frankfurt. Verisec is listed on Nasdaq First North in Stockholm since 2014.

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Appendix: Survey interim report

Results and interim report for 86 survey participants. Survey took place in June 2015.

**Question 1: Geographically, what is the extent of mobile access in your location?**

*Please choose all that apply*

- 3G services from telcos (digital - packet switching)
- 4G services from telcos (LTE/LTE-advanced)
- Free public access Wi-Fi service is only in SELECTED PUBLIC SECTOR SERVICE locations
- GPRS services from telcos (analogue - circuit switching)
- Free public access Wi-Fi service is only in SELECTED PRIVATE and/or THIRD SECTOR service locations within the organisation’s administrative boundary
- Free public access Wi-Fi service is in ALL PUBLIC SECTOR SERVICE locations within the organisation’s administrative boundary
- Free public access Wi-Fi service is UBQUITOUSLY available anywhere within the organisation’s administrative boundary
- Other (please specify)

n=86

COMMENT: Although rollout of 4G services is advancing rapidly, mobile data services from the telcos is still far from universal. Based on our survey results, 20% of areas still lack even 3G coverage. Almost 70% of respondents report free Wi-Fi in selected public service locations, but only 8% report universal availability from these places.

Only one response from a unitary authority in the south east indicated ubiquitous access throughout the administrative area. In Q2, we asked those who enjoyed ubiquitous Wi-Fi service to name their providers; this unitary authority declined to comment.
**Question 3:** Who are the main providers of free public Wi-Fi services in your area?

![Bar chart showing the distribution of Wi-Fi providers.]

- **Coffee shops, pubs, restaurants and/or hotels** (80%)
- **Local authority** (64%)
- **Domestic Wi-Fi piggyback, e.g. via BT hubs** (30%)
- **Telcos** (20%)
- **Transport utilities** (15%)
- **Health services** (10%)
- **Education (Non-LA)** (5%)
- **Other (please specify)** (2%)

**COMMENT:** Coffee shops, pubs, restaurants and hotels use free Wi-Fi to attract customers, including those who wish to use their facilities as a temporary office (see Insight report on mobile working). The only surprise here is that the figure - 80% - is not higher, perhaps because of the lack of these facilities in rural locations.

Local authorities report that they are one of the main providers in 64% of cases.

We wonder how many domestic customers using Wi-Fi are aware that their provider allows other customers to piggyback onto their provision, cited by almost 34% as one of the main sources of provision.

By 2017, Network Rail will invest £50m in Wi-Fi for passengers of train operating companies where there is no existing provision, including Thameslink, Southern and Great Northern (TSGN), and the ORR will specify the requirement to provide it for all new franchises. This should lead to a significant increase from the 16% reported for transport utilities.
**Question 4:** Are any of your organisation’s mobile access functions location sensitive?

- Don’t know, 21
- Yes, 16
- No, 47

n=84

**COMMENT:** Just 19% of mobile access functions are location sensitive, and surprisingly a quarter of respondents replied “Don’t know” to this question.

Location sensitivity can help tailor information and services to customer requirements, significantly improving utility.

**Question 5:** Please specify the purpose of your organisation’s apps’ location sensitivity.

- Travel & parking
- Find my nearest
- Street scene
- Fault reporting
- Mobile working

n=84

**COMMENT:** Of the 84 respondents to this question, 66 responded “Not applicable”, the graph to the left omits these responses.

The main use of location sensitivity is for travel and parking (28%). Advising on parking availability in real-time is not only convenient for drivers, it can also help reduce congestion.

Street uses include fault reporting, where tagging the report with the location can help reduce the time spent finding the problem. It is surprising that “Find my nearest” does not rank higher, given the popularity of this feature on councils’ public websites.
Question 6: Does your organisation provide any apps for mobiles?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
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</thead>
<tbody>
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<td>44</td>
</tr>
<tr>
<td>No</td>
<td>47.6%</td>
<td>40</td>
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84 respondents

COMMENT: Although Better connected has advised against using resources on mobile apps in favour of providing better mobile interfaces on the public website, just over half of respondents’ organisations provide these. Central government departments have to obtain Cabinet Office approval before developing apps, and approval is only given once the core service works well on mobile devices.

Question 7: How does your organisation authenticate users accessing cloud/web services?

![Bar chart showing authentication methods](chart)

n=14

COMMENT: Respondents were only shown this question if it was relevant based on their answers to previous questions.

Hardware tokens are the most popular authentication technique (71%), with both fixed passwords and SMS/email OTP in joint second place with 43%.
Question 8: For the apps provided by your organisation:

- Our apps are protected by app shielding
  - Yes: 29%
  - No: 71%

- Sessions between the apps and the central services are secured/encrypted
  - Yes: 64%
  - No: 36%

n=14

COMMENT: Only 16% of survey respondents were shown this question, based on their responses to previous questions.

Of those, 29% employed application shielding, 64% secured/encrypted sessions between the app and the central service, and one organisation does neither.
Question 9: For what functions does your organisation provide mobile apps?

Please choose all that apply

- Recycling and refuse
- Arts, events and leisure
- Housing
- Parking and travel
- Benefits and grants
- Adult social care
- Payments
- Planning and building control
- Environmental health
- Children and families
- Education
- Other (please specify)

COMMENT: Again, only 14 respondents out of 86 were shown this question.

Six respondents have apps for recycling and refuse, and three for arts, events and leisure. The remaining options, other than “Children and families” and “Education”, had just one response each.
Question 10: Who provided the organisation’s apps?

Please choose all that apply

![Bar chart showing the distribution of responses to the question about the providers of the organisation’s apps. The options are: Commercial organisation, In-house development, Voluntary/third sector organisation, Don’t know, Crowd-sourced, Other (please specify). The chart indicates that half of the 14 respondents sourced their app(s) from a commercial supplier, just 5 wrote their own app in-house.]

Comment: Half of the 14 respondents who saw this question sourced their app(s) from a commercial supplier. Just 5 wrote their own app in-house.

Question 11: Do you require citizens to download third party apps in order to get information from, or transact with, your organisation?

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<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
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<td>21.4%</td>
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<td>No</td>
<td>78.6%</td>
<td>11</td>
</tr>
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</table>

(14 respondents)
Question 12: What percentage of visits to the organisation’s public-facing website originate from mobile devices?

![Bar chart showing distribution of responses to Question 12]

n=74

COMMENT: At this question, the 14 who were separated out from Q7 onwards re-joined the main stream of respondents.

Industry-watchers such as Gartner are reporting on the big rise in web access from mobile devices. It is important to remember that this does not mean access from the street. Many people will be using a smartphone or tablet in their own home.

Our data reflects the trends reported elsewhere, showing that around half of all visits now originate from mobile devices. This underlines the importance of ensuring that the public website delivers a usable and useful presentation for mobile access.
Question 13: How do you measure/monitor citizen use of mobile access to the services you provide?

*Please choose all that apply*

![Bar chart showing popularity of various methods of measuring mobile access](chart.png)

n=74

COMMENT: Google analytics is the most popular technique for measuring and monitoring citizen use of mobile access (36%). However, site analytics (24%) and web analytics (14%) taken together account for only a little more, implying that Google has nearly half the market share. Worryingly, one quarter of respondents do not measure mobile access, and a further 7% replied “Don’t know.”
Question 14: To what extent is the provision of mobile access to online services driven by citizen demand?

COMMENT: Citizen demand is evidently driving provision of mobile access to online services, underlining the findings from question 12. Clearly, it is imperative that the website provides a good response to transactions initiated from mobile devices.
Question 15: Which approaches does your organisation take for web design?

Please choose all that apply

- Responsive web design methods
- Adaptive web design methods
- Not applicable
- Other

n=72

COMMENT: Over 80% of respondents favour responsive web design rather than adapting to a pre-determined set of device types. This approach has the great advantage of future-proofing the design against many potential changes in mobile device technology.
Question 16: If your organisation uses adaptive web design, which mobile device type does it adapt its presentation to?

Please choose all that apply

- Website adapts automatically to the
- Android
- iOS
- Windows
- We do not provide a specific mobile interface
- Firefox
- Blackberry
- Ubuntu Touch OS
- Sailfish
- Tizen
- Other (please specify)

n=17

COMMENT: Stripping out the 55 respondents who indicated that this question was not applicable to their situation, 53% of the remainder answered that their website adapts automatically to the characteristics of the end-user device, which sounds like responsive design.

After the three operating systems with the top market share (iOS, Android and Windows), the other options attract very low levels of support.

Question 17: If both adaptive and responsive design are used, which predominates?

<table>
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<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
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<tr>
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<td>57</td>
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<tr>
<td>Adaptive</td>
<td>8.6%</td>
<td>6</td>
</tr>
<tr>
<td>Responsive</td>
<td>12.9%</td>
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</table>

72 respondents

COMMENT: Again we see the preference for responsive design from those who use both techniques.
**Question 18:** To what extent does the corporate senior management team support investment in mobile access?

**COMMENT:** It appears that there are two distributions here. There is a group that enjoys total (or near-total) commitment from the corporate senior management team (black trend line), and another group in which support has scope to be much stronger (grey trend line).

Senior managers ought to be aware of the trend toward mobile and its importance, if not through their own use of these devices then through those of their families and friends.
Question 19: How important is mobile access to the organisation’s strategy for coping with austerity?

![Bar chart showing the distribution of responses to Question 19.]

<table>
<thead>
<tr>
<th>Response</th>
<th>Percent</th>
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<td>2</td>
<td>10%</td>
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<td>3</td>
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<td>4</td>
<td>20%</td>
<td>12</td>
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<tr>
<td>5</td>
<td>25%</td>
<td>18</td>
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<td>6</td>
<td>30%</td>
<td>24</td>
</tr>
<tr>
<td>7 - Critically important</td>
<td>20%</td>
<td>14</td>
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<tr>
<td>No opinion/unable to comment</td>
<td>0%</td>
<td>1</td>
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n=72

Question 20: Has the organisation collected any customer experience feedback?

71 respondents

COMMENT: 38% of respondents to our survey have not collected any customer experience feedback, and a further 22.5% do not know whether this has happened. That leaves just under 40% who have evidence to use in designing specifically for their customers, and in helping to maximise usage of a channel that has very strong support from the same group of respondents for its contribution to coping with austerity.

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
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<tbody>
<tr>
<td>Yes</td>
<td>39.4%</td>
<td>28</td>
</tr>
<tr>
<td>No</td>
<td>38%</td>
<td>27</td>
</tr>
<tr>
<td>Don’t know</td>
<td>22.5%</td>
<td>16</td>
</tr>
</tbody>
</table>
COMMENT: The 44 respondents (62%) who answered “Not applicable” are not included on the graph above.

Respondents here were asked to give free text responses, which were subsequently classified by common themes. Simplicity (33%) and ease of use (26%) are the main findings from customer feedback after experience of using mobile access. Reliability is mentioned in 15% of responses, whilst geographic relationship and engagement are also mentioned.
Question 22: How do you anticipate that the volume of mobile access to your organisation from the internet will change in the next year?

COMMENT: There is overwhelming support for the notion that mobile access will increase next year, with only one respondent anticipating no change.
Question 23: What channels do you use to publicise the availability of mobile access and apps for citizens?

Please choose all that apply

- Website
- Social media
- Announcements on organisation’s automated phone systems
- Street-scene advertisements
- None
- Sign writing on organisation’s vehicles
- Adverts on public transport
- Direct contact with public
- Organisation’s publications
- Other (please specify)

n=71

COMMENT: The website is the main channel for telling the public about mobile access (79%), and it is encouraging to see that over 60% are using social media.

We think that it is important to publicise the availability of these services using all possible channels, so the relatively low levels of take-up using announcements on automated telephony (25%), street scene (20%), sign-writing on organisations’ vehicles (14%) and other channels (all less than 6%) allows plenty of scope for expansion.
Question 24: What is your organisation’s approach to a local citizen account service for which citizens have to pre-register themselves before service access is granted?

Please choose all that apply

COMMENT: Nearly a quarter of respondents have no interest in a local citizen account, or state that it is not applicable to their organisation. Of the remainder, 22% have developed the capability, and 20% have bought it. 22% intend to acquire capability, and 14% will develop it themselves.
**Question 25:** Is authentication integrated into your organisation’s apps, or is it separate?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrated</td>
<td>15.9%</td>
<td>11</td>
</tr>
<tr>
<td>Separate</td>
<td>23.2%</td>
<td>16</td>
</tr>
<tr>
<td>N/A</td>
<td>60.9%</td>
<td>44</td>
</tr>
</tbody>
</table>

COMMENT: For information only, or non-sensitive applications such as reporting pot-holes, there is no need for authentication, so the 41% who do not authenticate is no surprise currently. However, the responses to other questions about citizen demand for mobile - and the part it plays in responding to austerity - means that inevitably, most organisations will need to authenticate sooner or later. We will monitor this trend with interest.

**Question 26:** How do you authenticate citizen access?

- We do not authenticate citizen access
- We intend to use Government Verify
- We are using a commercial alternative to the Citizen/personal account
- We intend to use a commercial alternative to the Government Gateway
- Awaiting a solution
- In-house solution
- We are using Government Verify
- Multiple approaches
- Commercial alternative
- We intend to use the Government Gateway

**COMMENT:** For information only, or non-sensitive applications such as reporting pot-holes, there is no need for authentication, so the 41% who do not authenticate is no surprise currently. However, the responses to other questions about citizen demand for mobile - and the part it plays in responding to austerity - means that inevitably, most organisations will need to authenticate sooner or later. We will monitor this trend with interest.
Question 27: If your organisation is using, or intends to use, a commercial alternative for authentication, which products are under consideration?

COMMENT: The 56 respondents (79%) who answered “Not applicable” to this question are not represented in the graph above.
Question 28: How does your organisation manage mobile devices used by employees (MDM)?

COMMENT: Judging by our survey, MobileIron and Airwatch each have 14% of the public and voluntary sector market. Blackberry still retains 10%, ahead of Microsoft and Good.

12 respondents chose “N/A” or “We do not use MDM” for this question, and were therefore omitted from the graph above.
Question 29: What mobile devices does your organisation supply to staff?

Please choose all that apply

- Apple tablets
- Android smartphones
- Windows tablets
- Apple smartphones
- Windows smartphones
- Android tablets
- Blackberry
- None - employees use their own mobile devices (BYOD)
- Unix-based tablets
- None - we do not provide employees with mobile devices
- Unix-based smartphones
- Other (please specify)

n=70

COMMENT: Apple tablets have a larger market share (61%) than Windows (44%) or Android (31%).

Android smartphones have a larger market share (47%) than Apple (41%) or Windows (37%). The once dominant Blackberry retains just 23%.

Please note that figures do not sum to 100% because this question was multiple choice.
Question 30: What proportion of access to internal systems by employees originate from mobile devices?

COMMENT: Some 67% of organisations surveyed do not know what percentage of employee access to internal systems originate from mobile devices, and were omitted from the graph above.

Of the 23 respondents who do measure this, 57% report that 5-10% of employee access is from mobile devices, and 26% report 11-20% mobile access.

Please note that the graph above displays these figures as percentages of the total number of respondents.
**Question 31:** Is your organisation planning on deploying mobile ID or mobile tokens to replace existing authentication?

**COMMENT:** In Q7 we found that over 35% of organisations surveyed use mobile ID or mobile tokens. Of those who do not currently use them, 46% intend to go down this route.
**Question 32:** How do you anticipate that the volume of mobile access to your organisation’s systems by employees will change in the next year?

![Bar chart showing the response to Question 32.]

*COMMENT:* Here we see a slightly different picture than the anticipated change for citizen access, with five more organisations anticipating no change here than in Q22. We assume that this means these organisations have already gone as far as they think possible with this approach.

However, the overall pattern of response is very positive.
Question 33: Does your organisation provide a secure portal for employee remote access?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>82.4%</td>
<td>58</td>
</tr>
<tr>
<td>No</td>
<td>17.6%</td>
<td>12</td>
</tr>
</tbody>
</table>

70 respondents

COMMENT: Building upon the positive result in the previous question, we see that 82% of organisations provide a secure portal for employee remote access.

Question 34: How far along is the organisation in considering mobile access for employees?

Progress is stalled by CoCo considerations/constraints
No current interest
May consider this year
Early planning stages
In development
Internal testing prior to roll-out
User testing (beta release)
Implemented

n=12

COMMENT: This question was shown only to the 12 respondents whose answers to previous questions suggested they do not yet have mobile access for employees.

Of the 12 responses received, all but 2 are at stages prior to implementation.
Question 35: How does your organisation authenticate employee remote access?

COMMENT: This question, and the two that follow, were shown only to the 58 respondents whose answers to previous questions suggested they have already implemented mobile access for employees.
Question 36: What percentage of employees are provided with mobile access facilities?

COMMENT: Here is another distribution that seems to have two peaks, one around 21-30% and another 41-50%. The split may be around the nature of the work, with the lower peak for general office staff who may need to work away from base on a sporadic or casual basis, and the higher peak concerning those who work away from base as a matter of routine.
Question 37: How has your organisation overcome, or is planning to overcome, CoCo constraints on remote access?

Please choose all that apply

COMMENT: Until the latest advice from the Cabinet Office, allowing a risk-managed approach, CoCo compliance was a difficult issue for many local authorities. Locking down end-user devices obviously limits the available functions, but for many, it was the “least worst” option, with 61% adopting.

Thin clients help with security, and can also prolong the life of old desktop kit. Nearly 45% have used this approach. The walled garden isolates PSN activity from other work within the organisation; 32% have used this route. As yet, the other solutions suggested have attracted very limited support.

Note: figures do not total 100% as respondents could choose multiple options.