

Digital Government Imperatives of the Kingdom of Saudi Arabia: Saudi Arabia Ranks Highest in Perception of E-Government Services Improvement and Third in Service Usage

Since 2014, digital services provided by the Saudi Arabian Government have vastly improved for 93% of users, according to BCG's 2016 Digital Government Survey

Riyadh, 12 June, 2017 — The Kingdom of Saudi Arabia ranks top on the highest net perception of service improvement over the past two years globally and ranks third in terms of the highest level of frequency in e-government usage, with 32.6% more Saudi citizens using these services more often according to [The Boston Consulting Group's \(BCG\)](#) 2016 Digital Government Survey. The survey, which was based on 13,570 individual responses across 21 countries and 26 digital government services, benchmarks citizen perspectives on their use of digital channels for government services.

Figure 1

		Highest level of usage frequency	Highest number of services accessed	Highest net satisfaction with services	Highest net perception of service improvement over past 2 years	Satisfaction with services compared to the private sector
	India	1	1	4	3	5
	UAE	4	4	7	2	1
	KSA	3	3	14	1	2
	Estonia	11	2	1	8	8
	Indonesia	2	7	11	4	12
	China	5	8	15	5	6
	Malaysia	7	5	12	9	21
	USA	16	13	2	15	11
	Russia	12	17	16	6	9
	Australia	18	12	3	13	15
	New Zealand	21	9	5	12	16
	France	14	16	18	10	7
	Sweden	19	11	10	14	14
	South Korea	10	10	21	18	10
	Norway	6	15	19	11	18
	Hong Kong	8	20	20	20	3
	UK	17	19	8	17	13
	Germany	13	18	13	16	19
	Denmark	9	14	17	19	20
	Netherlands	20	21	9	21	17

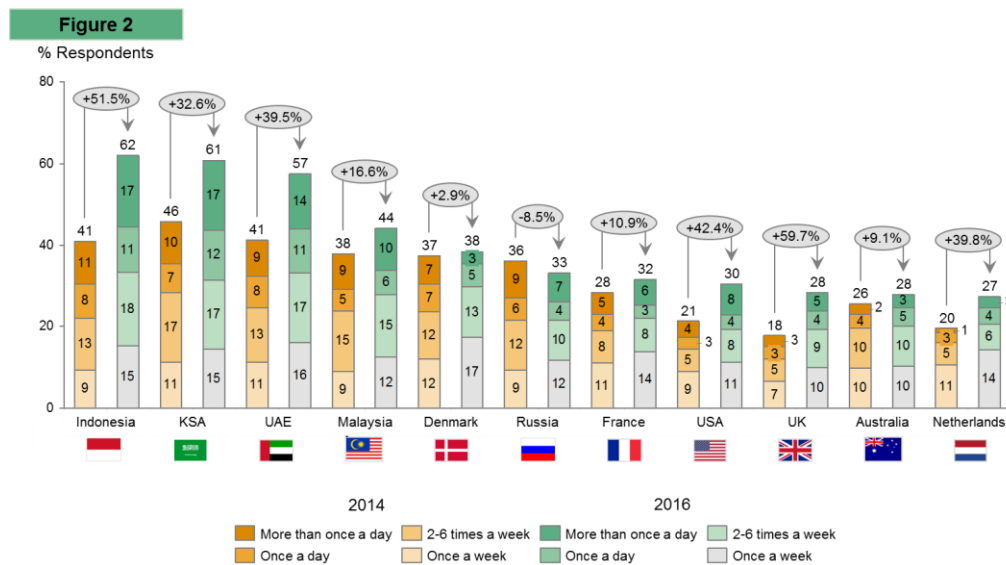
Source: BCG 2016 Digital Government Satisfaction Survey

The 2016 survey addressed digital government user access, adoption, satisfaction, privacy and security concerns. BCG unearthed key trends across all studied areas, including frequency of use of digital government services, which has increased substantially since 2014 with wearable devices having the highest projected use growth amongst all other. Globally, information, taxation, and employment services are the most widely used digital government services, and significant improvement in service satisfaction has been noted over the past two

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years, with some countries making faster strides than others. Millennials, full-time students, lower income brackets and urban dwellers are the least satisfied with e-government services, and concerns over privacy are a leading deterrent for adoption.

Saudis increasingly rely on online government services



Source: BCG 2016 Digital Government Satisfaction Survey, 2014 Digital Government Survey

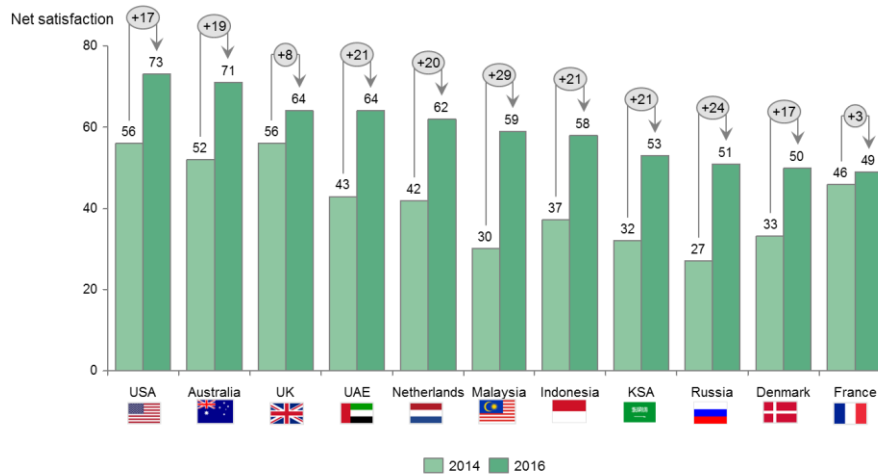
BCG found that Saudi Arabia has witnessed a high degree of online service adoption with 32.6% more Saudi citizens increasingly relying on e-government services and accessing these services across multiple devices. In fact, weekly use of online government services has increased by 30% since 2014. The most accessed and satisfactory e-government services include job search, ID card application and information access; conversely, the least accessed are related to housing, obtaining government benefits and subsidies.

“Saudi Arabia’s citizens have increasingly become digital natives and their frequency of use of digital government services has increased substantially since 2014. In particular, their adoption of wearable devices has mirrored global trends showing highest growth in projected use, which requires an accelerated path towards multiple channels for citizens to access government service,” said Rami Mourtada, Principal and Digital Transformation Lead at BCG Middle East.

Saudi Arabia has witnessed increasing improvement in service satisfaction

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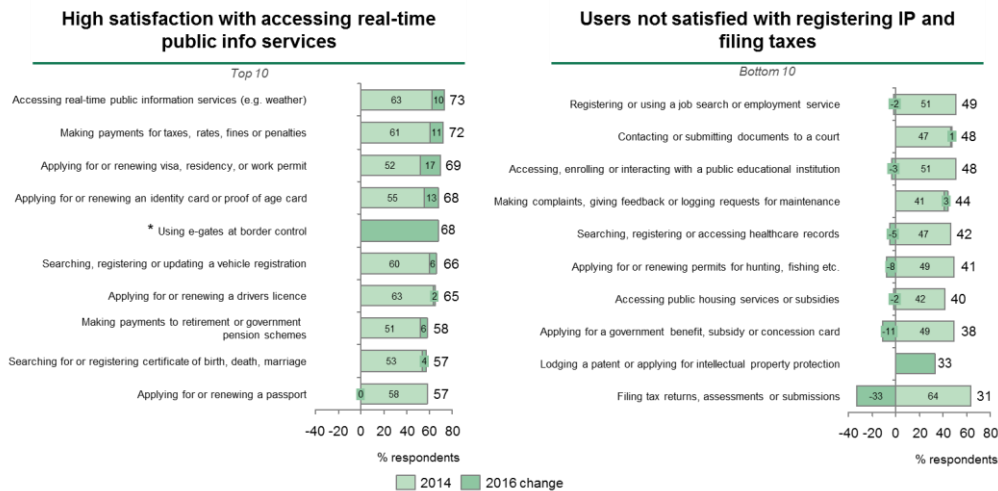
Figure 3



Source: BCG 2016 and 2014 Digital Government Satisfaction Survey

Nine out of ten Saudi users believe that e-government services have improved over the past two years, with the country's net satisfaction score improving by 21 points in the same period. Nevertheless, Saudi Arabia's net satisfaction score still lags behind most global and some regional countries.

Figure 4

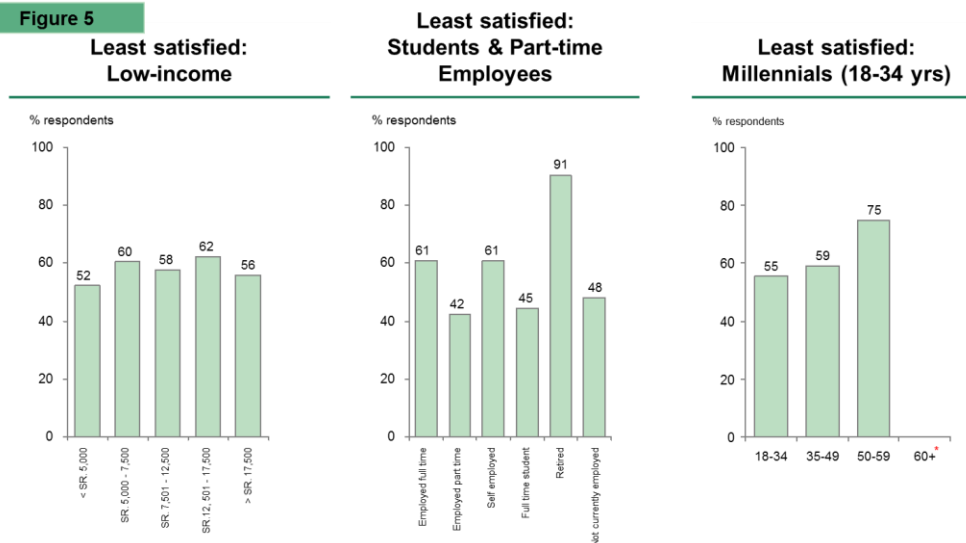


Source: BCG 2016 Digital Government Satisfaction Survey

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There is high satisfaction when it comes to accessing real-time public information services amongst Saudi Arabia's citizens. The services that ranked highest in terms of satisfaction include accessing real-time public information services (73%), making payments for taxes, rates, fines or penalties (72%), and applying for or renewing visas, residency and work permits (69%).

Figure 5



* Note: Very low base (n=1)
Source: BCG 2016 Digital Government Satisfaction Survey

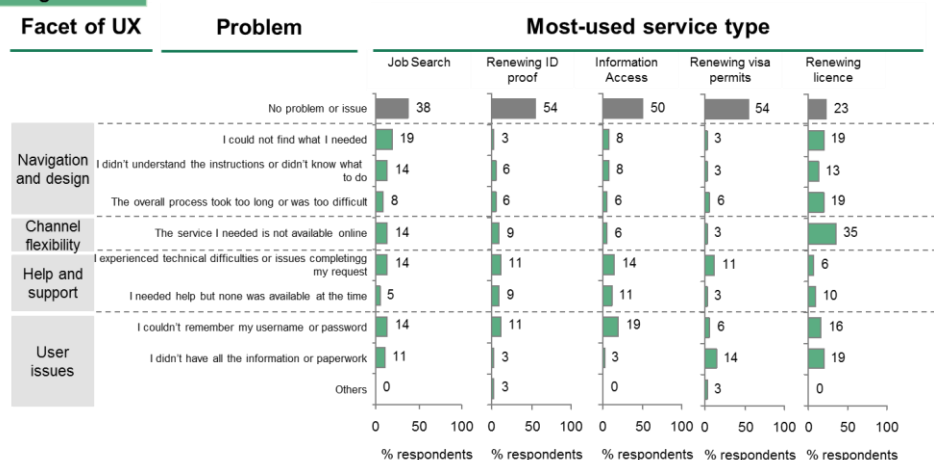
Saudi respondents are most dissatisfied with the lack of real-time support and assistance, security and control over information and transparency. Young, low-income and part-time employed Saudi respondents are the least satisfied customers of digital government services.

User Experience (UX) continues to fall short of the majority of Saudi's expectations

69% of Saudi users faced a problem while using e-government services. The most pressing concerns for surveyed citizens were that the service they needed was not available online, instructions were vague and not easily understood and users could not access the information they needed.

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Figure 6



Source: BCG 2016 Digital Government Satisfaction Survey

In terms of the user experience, renewing visas and work permits is one of the services that presents the least problems for Saudi citizens. Amongst the most used services, users face the most problems when it comes to applying for or renewing a license, with 35% of users stating that the service they needed was not available online.

Users are comfortable sharing personal information on government digital channels

While 35% of Saudi's indicate that they prefer face-to-face transactions, Saudi users responded that they are generally comfortable sharing personal information through government digital channels. The biggest concerns expressed with sharing information were those of theft, loss of information and its misuse. In addition, 24% of survey respondents indicated that they might stop accessing government services out of fear that personal information might be made public.

Digital imperatives for Saudi Arabia's e-government service offering

"To further improve its digital government offerings, Saudi Arabia must rapidly act and consider four key actions in the immediate future – review individual government digital strategies and coalescing around a common coordinated national digital services roadmap, developing and enforcing a set of common digital standards, prioritizing the user experience and customer journey to improve perception and satisfaction of digital services and strengthening and promoting the regulatory environment overseeing the national digital

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infrastructure to build digital capabilities across citizen-facing government entities,” concluded Mourtada.

- Review government digital strategy and develop a roadmap to meet the demand for digital services:
 - Saudi Arabia should identify high demand services of the future (independent of current functionality) and understand the gaps and functionality limitations of current digital services to develop a roadmap for the improvement of digitization for existing high demand services.
- Develop common standards for digital services across government, focusing on:
 - Decreasing transaction time by decreasing the complexity of digital services and weeding out confusing design to reduce unnecessary steps; as well as improving usability and accessibility for faster and easier to use digital services including a clear design, and smooth user authentication with minimal requests for information.
- Develop an approach to improve satisfaction for and perception of digital services across key user segments including youth, lower and middle income and part time employees:
 - Ensure that the services offered are relevant to these segments, provide access to key channels including smart TV, wearables and e-Readers, and communicate the benefits of using digital government services clearly, while simultaneously alleviating fears about user data sharing and security across government entities and services.
- Strengthen and promote a regulatory environment that governs user privacy and user data security, including clear rights for government use and access of citizens data, government oversight of data, individual control over data sharing and compensation or penalties for the misuse of data

Notes to Editors: A copy of the report can be downloaded [here](#).

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