The ethnographic approach : an aid in understanding the behaviour of users of public services

An example from the tax area

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Repeated contacts with the administration: a lose-lose situation (1 of 2)

- **For the user:**

  - **In France, 1 in 5* of all users of the tax service** need more than one contact with the tax office to have their needs satisfied.

  - This rises to **1 in 4** for those using the telephone[1];

  - **One user on two** choose face-to-face contact for treating tax issues*

- **For the public service:**

  - Repeated contacts have a cost.

  - It costs forty times more to handle a request face-to-face than to handle the same request through email**:
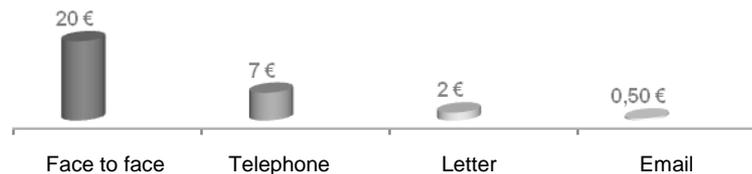
20 €	7 €	2 €	0,50 €
Face to face	Telephone	Letter	Email

* Annual survey carried out with a representative sample of 1,000 French people among whom 320 are users of the tax services, Oct. 2012

** SAGE survey: Best practices for client relations - 2011

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- **According to users,** repeat contacts are caused by:

  - A lack of **clarity in the information provided 53%**

  - The inability to **complete the process** 36%

  - The need to **have confirmation of the information provided 28%**

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An ethnographic approach for understanding this « repeated behaviour »

What is ethnography?

▪ A method based on examining a phenomenon in it context through a more or less participative observation

Why choose an ethnographic approach?

▪ To observe "what people really do and not what they say they do » :

→ *e.g.: Tax officials believe that people come to the tax office to extend their deadlines , when in reality they come to deposit their tax declarations.*

▪ To observe what people do in real life :

→ *Are users particularly well organised or disorganised with regard to their tax documents, etc ?*

Description of the methodology

Objectives

- **Understand why** users of the tax office need several contacts to have their requirements satisfied
- **Establish the various attitude and behaviour profiles** concerning the different contact channels
- **Find out the drivers** to promote the use of electronic means for the different type of users
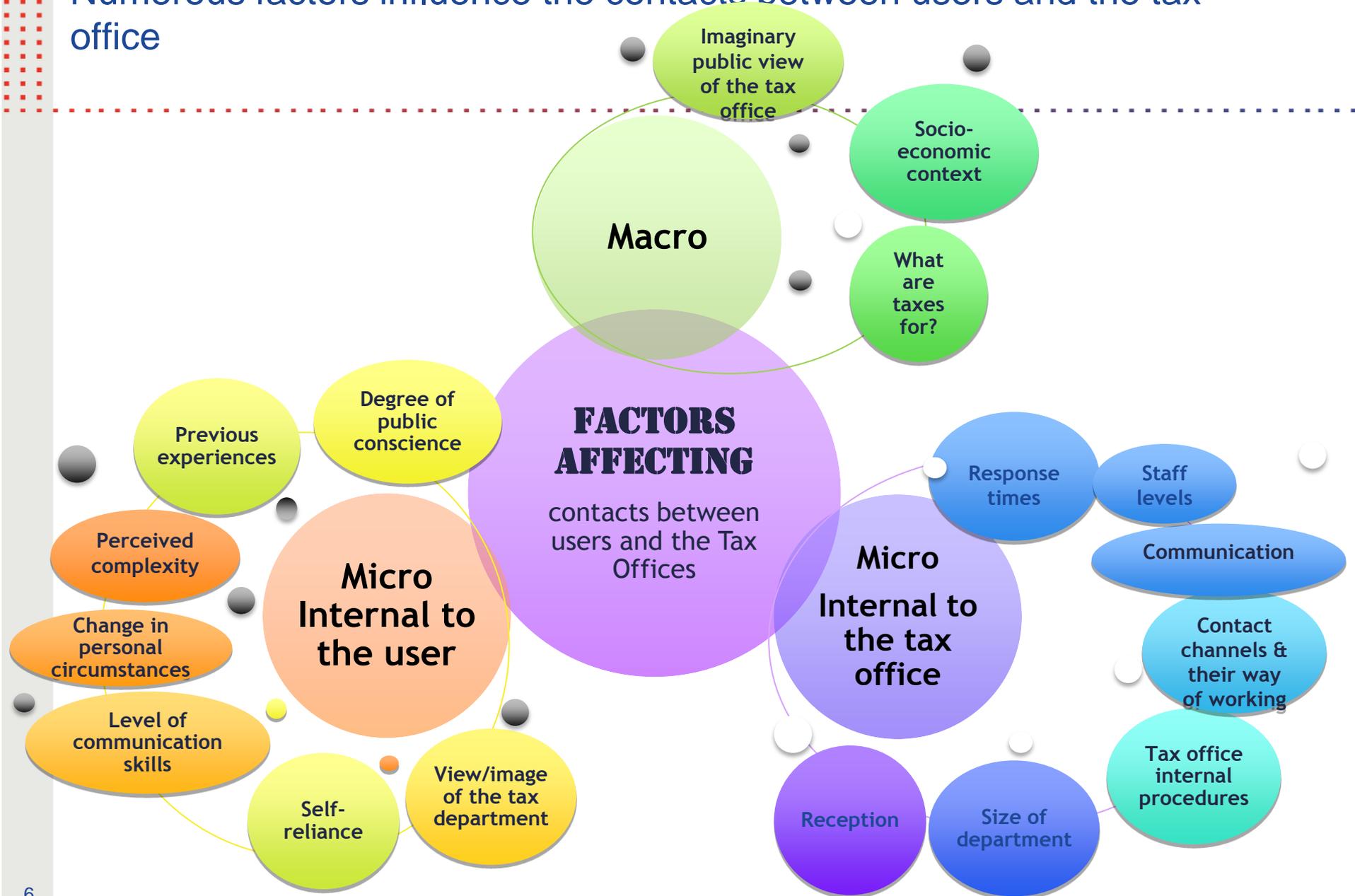
Methodology

Tax office Users' part
- 24 interviews of 3 hours (2 hours discussions at the beginning and 1 hour at the end of the process lasting 3 months)
- The interviewees had to maintain a report book

Tax office servants' part
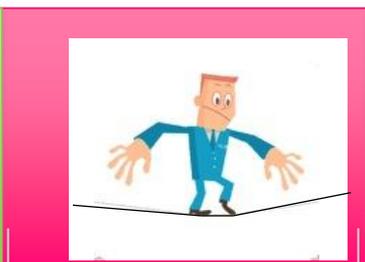- 4 focus-groups in two towns : Paris and Tours + 8 interviews of reception managers

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Imaginary public view of the tax office

Socio-economic context

Macro

What are taxes for?

Degree of public conscience

FACTORS AFFECTING

contacts between users and the Tax Offices

Previous experiences

Perceived complexity

Micro Internal to the user

Response times

Staff levels

Micro Internal to the tax office

Communication

Change in personal circumstances

Contact channels & their way of working

Level of communication skills

Self-reliance

View/image of the tax department

Reception

Size of department

Tax office internal procedures

5 types of user identified

LEAST LIKELY TO USE → MOST LIKELY TO USE INTERNET

The confused
- Person unsure of him/herself
- Limited educational level/difficulties with the French language

The regular
- Person with previous experience, negative perhaps (errors and/or claims) with the tax authorities
- Would like to bend the rules

The worrier
- Person anxious to do everything according to the rules
- The elderly (over 55)
- Organised (administrative documents meticulously filed in hard copy)

The (pseudo) novice
- Person with a change in circumstances (divorce, unemployment, etc.) and confronted with new procedures (including first-time users)

The man in a hurry
- Very self-assured, at ease with latest technology and very busy
- Young, dynamic and working

Preferred contact method

The confused	The regular	The worrier	The (pseudo) novice	The man in a hurry
Over the counter	Favours contact methods previously used (sucessfully?)	Over the counter, letters	Relational contact methods (over the counter & face to face, telephone, email)	Electronic contact methods (telephone, internet)

Key requirement

| **Help** | **Start from beginning** | **Reassure** | **Guide** | **Leave alone** |

Lessons learned and difficulties encountered

Results/Lessons learned

- Repeated contacts are underestimated in users declarations :
  - E.g. people forgot that they have first surf on Internet before calling the tax office.

- Identification of actions by type of individual and ways to move them forward:
  - E.g. the "worrier": reassurance
  - E.g. the "man in a hurry": leave to work remotely

Difficulties encountered

- At first, reticence from the tax office concerning observation of counter staff

Next steps

3 priority axes
- Re-think the process for the "pseudo-novice"
- Joint user/tax servants workshops to co-develop solutions for moving people to the Internet (by profils)
- Use of the nudge technique to move users to the Internet.