2022 Digital Trends

Public Sector in Focus

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With nearly 10,000 participants in the 2022 study, more than 95,000 professionals from every continent (including Antarctica) have contributed their time and insights to this research since its inception in 2010. Their contributions make this the largest and most durable international study of how digital trends are changing the digital experience discipline.

Adobe and Econsultancy would like to thank everyone for their effort and insight.

1. Foreword

Welcome to the *2022 Digital Trends – Public Sector in Focus* report. Based on Adobe's annual survey and produced in collaboration with Econsultancy, the report captures the insights of 509 qualified government and public sector respondents. It has enabled us to map the evolution of digital experience trends and find opportunities for organisations to refine their strategies and better serve the public in 2022 and beyond.

Over the past two years, global events have accelerated the need to modernise and innovate. The pandemic raised the bar for more agile, collaborative structures that speed up the time-to-value – pushing enterprising governments to reimagine services with greater creativity and ingenuity.

However, this study suggests that there's still room to grow. Only 14% of government and public sector respondents believe their digital experience is ahead of the public's expectations.

Keeping pace with public preferences and unlocking next-generation government services relies on user-centric initiatives and priorities. This adds new items to the CIO's to-do list and shifts the role into an increasingly strategic and visionary space.

The *2022 Digital Trends – Public Sector in Focus* report explores a wide range of trends affecting the public sector's ability to navigate changing citizen expectations, escalating complexity, talent shortages, and the realities of hybrid work environments. With the world in constant flux, this year's report offers timely insights to help public sector professionals reflect on their strategies to drive sustained success in 2022 and beyond.

James Hanson
Head of Industry Strategy for Public Sector,
Digital Strategy Group, Adobe

> **"Only 14% of government and public sector respondents believe their digital experience is ahead of the public's expectations".**
>
> *2022 Digital Trends – Public Sector in Focus, Adobe*

2. Executive Summary

Today's government and public service digital leaders face fresh pressures from new executive mandates and accelerated digital behaviours. As interactions with services become increasingly digitised, digital experiences become a yardstick for government competence.[1] With trust in government waning even before the pandemic, excellent citizen-oriented digital experiences have never been more critical for restoring confidence.

To meet citizens' expectations, government organisations need to rapidly ramp up the digital skills of their employees and reappraise their approaches to designing and delivering high-quality digital services. As issues around equity and inclusion top agendas, digital leaders need to ensure such capabilities are strengthened by an excellent understanding of inclusive and equity-centred design principles.

Unfortunately, government and public service organisations come up against internal obstacles in experience delivery. The lack of up-to-date digital skills and outdated legacy systems make sustainable, enduring innovation challenging.[2] Successful organisations must balance ambition with pragmatism and a great understanding of issues on the ground.

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1 https://www.nytimes.com/2021/11/24/technology/government-tech.html
2 https://www.mckinsey.com/industries/public-and-social-sector/our-insights/
  government-data-management-for-the-digital-age

"As issues around equity and inclusion top agendas, digital leaders need to ensure such capabilities are strengthened by an excellent understanding of inclusive and equity-centred design principles."

2022 Digital Trends – Public Sector in Focus, Adobe

3. Reimagining Anticipatory and Inclusive Digital Services

3.1. Anticipating Citizens' Future Needs

Following two years of accelerated digital behaviours by the private sector, today's public expects fast, personalised, and anticipatory digital experiences as standard. An excellent customer experience is no longer a lever for competitive advantage. It's considered a table stakes demonstration of competence.[3]

Citizens compare their government interactions to their previous best digital experience, no matter the institution, private or public. So, just as streaming platforms use predictive data modelling and artificial intelligence (AI) to recommend the following programme to watch, the public expects governments to deliver equally intuitive experiences. What's more, they want this experience without elevated levels of data surveillance or excessive government influence over their personal lives.

Governments are increasingly mandating user-centricity in service design and delivery to bolster public confidence. Half of critical government digital KPIs are expected to include a user experience metric to ensure services meet citizens' expectations this year.[4]

This increased focus on user-centric experiences has pushed enterprising governments beyond e-government digital facsimiles to reimagine services entirely with greater creativity and ingenuity. Denmark's government, for example, has introduced novel, proactive services triggered by life stages. Family benefits are now automatically distributed to parents on the birth of a newborn child without any forms being filled or submitted.[5]

Delivering government services that anticipate citizens' future needs is no mean feat. It relies on a shift away from traditional technology-centric development models – and an unmistakable reorientation around the public's needs and outcomes. This is only made

possible by blending user experience (UX), customer experience (CX), employee experience (EX), advanced data analytics, and AI capabilities.

This isn't easy – and most surveyed government and public middle management and junior staff do not believe they're excelling on this front. Only 14% believe that their digital experience is ahead of user expectations (*Figure 1*). Just 8% of staff, across all seniority levels, consider their track record excellent for managing digital experiences.

FIGURE 1

How would you describe your organisation's digital customer experience?

- **Our digital experience is lagging customer expectations**
- **Our digital experience keeps pace with customer expectations**
- **Our digital experience is ahead of customer expectations**
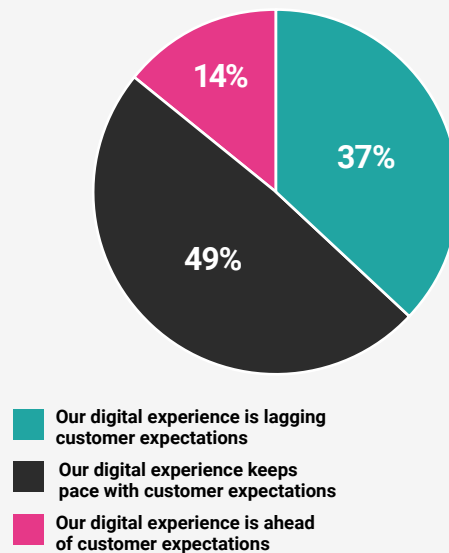
Sample: Government/public service middle managers and junior staff (394)

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021

2 https://www.mckinsey.com/industries/public-and-social-sector/our-insights/government-data-management-for-the-digital-age
3 https://www.nytimes.com/2021/11/24/technology/government-tech.html
4 https://www.gartner.com/en/publications/accelerate-digital-for-future-ready-government
5 https://ec.europa.eu/social/main.jsp?catId=1107&langId=en

3.2. Managing Competing Priorities

Next-generation digital services do not top government agendas. Managing the increasing need to serve the public digitally and meeting the public's enhanced CX expectations rank below increasing organisational efficiency and reducing costs in investment priorities. (*Figure 2*).
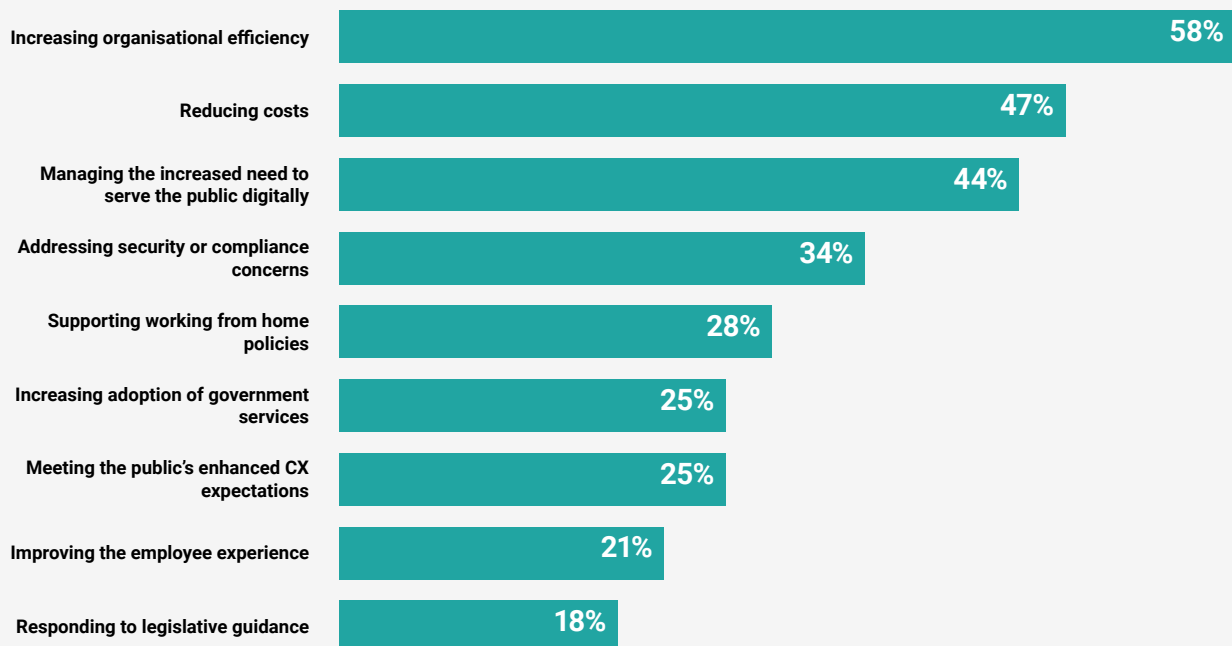
Today's government digital professionals face a myriad of challenges and competing demands. Today's leaders must meet new customer digital expectations, manage major cybersecurity concerns, and enable successful remote or hybrid working. All while managing resources effectively and using taxpayers' money with maximum efficiency.

> **"Delivering government services that anticipate citizens' future needs (…) is only made possible by blending user experience (UX), customer experience (CX), employee experience (EX), advanced data analytics, and AI capabilities".**
>
> *2022 Digital Trends – Public Sector in Focus, Adobe*

FIGURE 2

Please rank the top three drivers of digital investments in 2022 in your organisation

Increasing organisational efficiency	58%
Reducing costs	47%
Managing the increased need to serve the public digitally	44%
Addressing security or compliance concerns	34%
Supporting working from home policies	28%
Increasing adoption of government services	25%
Meeting the public's enhanced CX expectations	25%
Improving the employee experience	21%
Responding to legislative guidance	18%

Sample: Government/public service leaders (49), government/public service middle managers and junior staff (367)

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021

3.3. Designing Equitable Experiences

Today's governments are grappling with significant inclusion and equity challenges in policy-making. As the lines between digital strategy and policy strategy blur, equitable digital experiences are rapidly becoming a growing governmental focus.

According to the Digital Freedom Fund, marginalised and racialised groups are disproportionately impacted negatively by the increasing use of technology.[6] Retrospectively trying to 'fix' existing technology and remove inbuilt conscious or unconscious biases isn't the solution. Instead, the World Economic Forum recommends organisations design technology from the get-go "around the needs of, and in participation with, individuals and communities."[7]
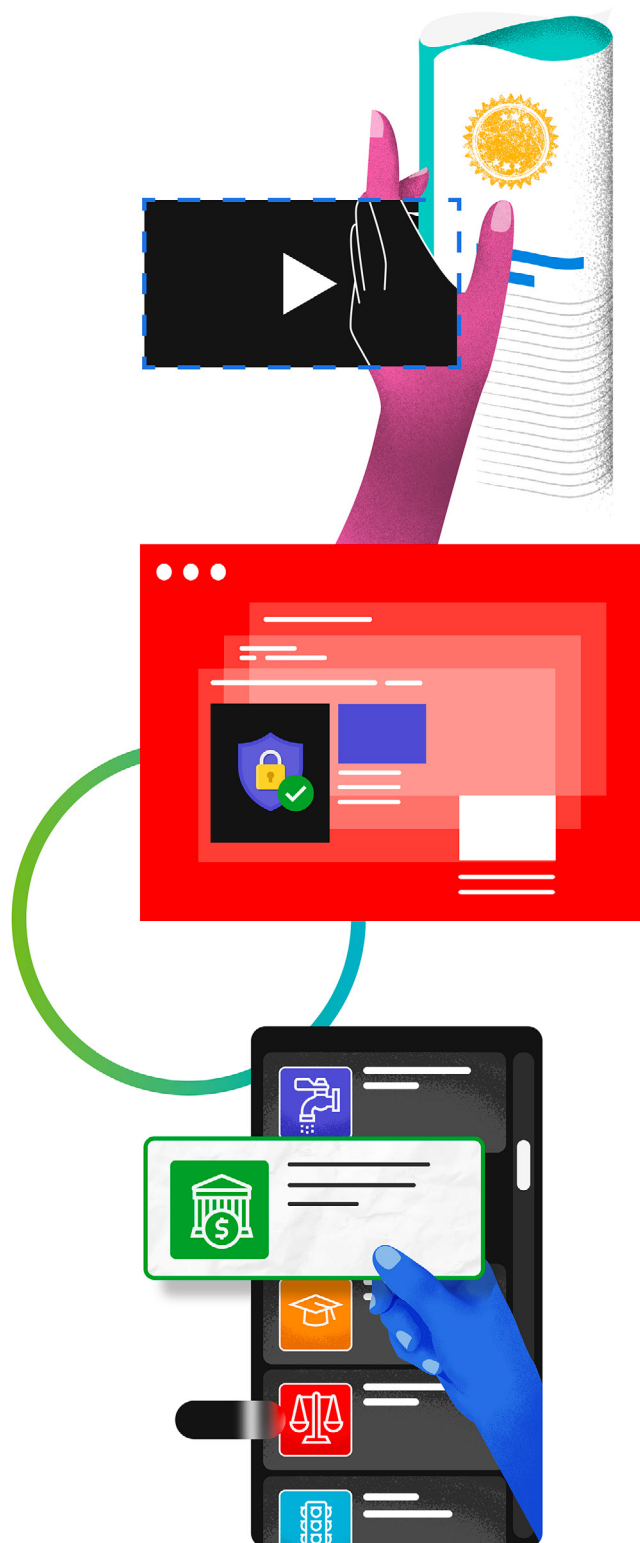
Leading governmental bodies tackle challenging social and ethical issues in digital service delivery through inclusive design standards and equity-centred design frameworks. Building on design-thinking principles, equity-centred design intentionally raises awareness of systemic oppression when creating and developing new digital services, tools, and experiences. The process urges designers to observe and reflect on their own identity, power, privilege, biases, and intentions.[8]

Naturally, such thinking relies on a new culture and accepted design methodology. It also requires government bodies to think about digital experiences in more expansive and outcome-oriented terms – as drivers of social change.

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6 https://digitalfreedomfund.org/how-artificial-intelligence-impacts-marginalised-groups/

7 https://www.weforum.org/agenda/2021/07/tech-focus-needs-marginalized-groups/

8 https://dschool.stanford.edu/resources/equity-centered-design-framework

4. Minding the Skills and Data Gap

4.1. Rebuilding Trust

Seamless, personalised, and inclusive governmental digital services are fuelled by public data. The access to – and use of – public data relies on successful digital identity programmes and excellent data-sharing initiatives across governmental databases. Accelerated by the Covid-19 pandemic, governments have made strides in expanding digital identity programmes, improving data sharing mechanisms, and increasing data access across institutions, private sector organisations, and government departments.

But public trust is integral in digital identity and data sharing initiatives – and global confidence in governments is waning.[9] Well-publicised data breaches have not helped position governments as effective custodians of sensitive personal data. Privacy and human rights experts have raised concerns about governments' scaling data surveillance and the resulting impact on civil liberties.[10]

Governments are exploring new data controls to modernise digital government services without compromising public confidence. This means increasing investment in data architecture foundations and introducing new initiatives, such as data trusts for the UK government.[11] In Estonia and Cambodia, governments use decentralised data exchanges founded on 'The Once-Only Principle' of data sharing.[12] Data usage is logged, and individuals can review past logs for any suspicious activity. Aadhaar, India's biometric digital identification system, allows the public to control and revoke data access. Citizens can change their biometric ID for a virtual 16-digit ID, and this ID number cannot be tracked across databases.[13]

This study suggests government and public sector organisations believe they have a good handle on data controls. 71% of government or public sector staff think they are either 'effective' or 'very effective' at giving users control over how their data is used (*Figure 3*).

FIGURE 3

How would you rate your organisation in the following areas? Giving users control over how their data is used

- **Highly ineffective**
- **Ineffective**
- **Effective**
- **Highly effective**
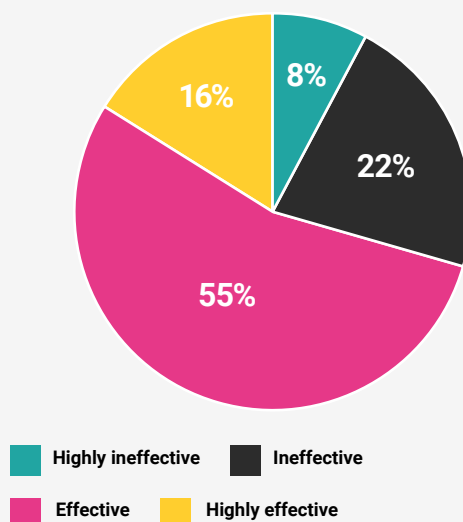
Sample: Government/public service middle managers and junior staff (360)

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021

"**Government CIOs in 2022 need a firm understanding of the customer and their interactions across a range of services. They need a vision for the future of government and the role technology plays in that future. Success lies in communicating that vision – and bringing it to fruition while still managing complicated day-to-day operations**".

2022 Digital Trends – Public Sector in Focus, Adobe

9 https://www.edelman.com/trust/2021-trust-barometer
10 https://philpapers.org/rec/VLIPM
11 https://www.gov.uk/government/publications/uk-national-data-strategy/
national-data-strategy
12 https://camdx.gov.kh/
13 https://www2.deloitte.com/us/en/insights/industry/public-sector/government-trends/2021/public-trust-in-government.html

4.2. Managing Competing Responsibilities

Thanks in no small part to the global pandemic and its catalytic effect on the digitisation of government, CIOs now find themselves taking on an ever-growing list of roles and responsibilities. They must drive internal efficiencies and lead in the transformation towards 'anywhere work' environments. At the same time, they must manage multiple vendors and partners through complex ecosystem relationships, protect their organisations from sophisticated cybersecurity threats, and answer to citizens' experience expectations in service design and delivery.
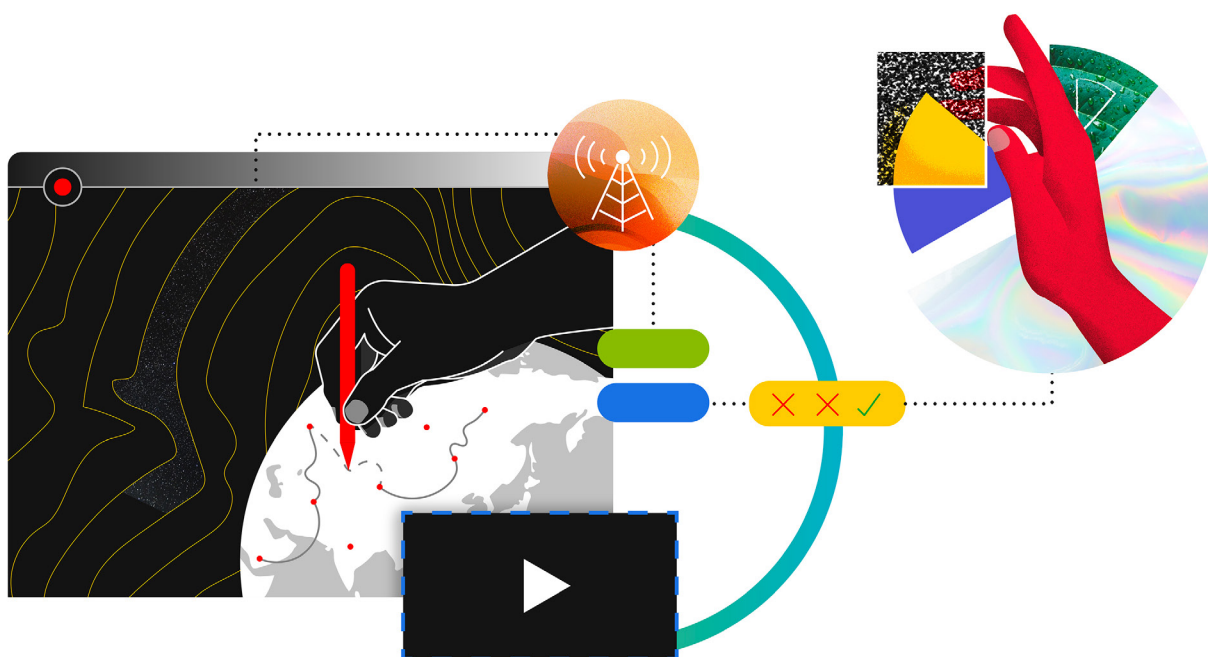
User experience has become an increasingly pressing priority, especially in the United States. In December 2021, the White House issued the Executive Order on Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government.[14] Specifically, the Executive Order insisted that 'the Federal Government's management of its customer experience and service delivery should be driven fundamentally by the voice of the customer through human-centred design methodologies; empirical customer research; an understanding of behavioural science and user testing, especially for digital
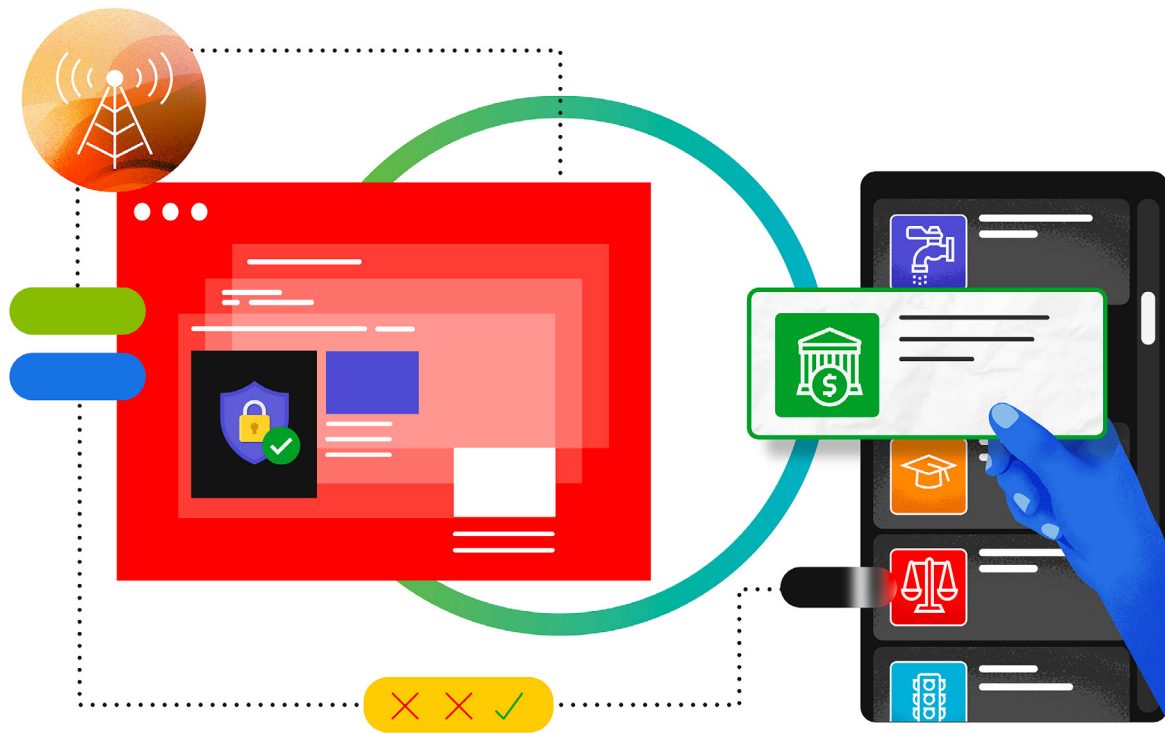
services.' This has created fresh challenges for U.S. Government CIOs and a new impetus to rapidly upskill their departments in experience design and forge cross-agency collaborations.

Over the last decade, the government CIO's job description has changed beyond recognition. Once a largely back-office technologist role, today, the function is far more strategic and expansive. Government CIOs in 2022 need a firm understanding of the customer and their interactions across a range of services. They need a vision for the future of government and the role technology plays in that future. Success lies in communicating that vision – and bringing it to fruition while still managing complicated day-to-day operations.

CIOs need to prioritise departmental and personal digital upskilling to simultaneously handle internal operations, customer experience, and ecosystem partners. They must also build partnerships across departments to share best practices and collaborate on sustainable, integrated, and interoperable solutions.

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14 https://www.whitehouse.gov/briefing-room/presidential-actions/2021/12/13/
executive-order-on-transforming-federal-customer-experience-and-service-
delivery-to-rebuild-trust-in-government/

4.3. Filling The Digital Skills Gap

The lack of up-to-date digital skills for government and public service staff is a major internal barrier to user-centric services. Improving digital skills is considered the joint top operational change that would most significantly affect experience. Training and learning programmes are considered the most significant drivers in increasing productivity.

Today's training programmes leave room for improvement. Only 20% of government or public staff score their talent and education programmes eight or more out of 10. Sixty-one per cent of staff *agree* that their organisation lacks critical public sector digital skills, such as design thinking and journey mapping. While staff recognise that digital skills development is vital for future success, they also appreciate that training programmes need an upgrade. Acknowledging that there's a problem is a good and necessary first step to fixing it.

To accelerate digital initiatives, digital leaders need to have a clear view of the skills they need to develop, acquire and retain. These skills include more technical capabilities, such as expanding internal strengths

in AI and advanced data analytics. But they also include softer skills, such as critical thinking, business acumen, project management, creative thinking, and empathy. In fact, a recent European Public Sector IDC study discovered that digital skills were needed most in areas outside the IT team. These included productivity tools, digital service design, business process automation, and digital marketing.[15]

The UK Government's GDS Academy has become a digital skills development blueprint for other international governments.[16] Blending in-person and online training courses, talent programmes focus on building strength and depth in critical areas. These include digital leadership, artificial intelligence, agile methodologies, business analysis, product management, delivery management, and human-centred design. The curriculum nods to building internal strengths in designing, managing, and analysing digital initiatives.[17]

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15 https://pages.awscloud.com/IDC_Research_ UsingtheCloudtoAddresstheDigitalSkillsGap_EMEA.html

16 https://gds.blog.gov.uk/2019/02/20/gds-academy-turns-5-and-celebrates-training-10000-students/

17 https://www.gov.uk/government/collections/gds-academy-course-descriptions

5. Unlocking Sustainable Innovation

5.1. Realising The Benefits of Automation

Faced with budget cuts and skills gaps, democratising technologies, such as low/no-code platforms, natural language processing (NLP), and robotic process automation (RPA), hold great promise. This study suggests government and public service middle managers and junior associates recognise the potential of increased service automation. Greater operational efficiency through automation was considered the top operational priority for improving the customer experience in 2022 (*Figure 4*).

The Swedish municipality of Trelleborg started using robotic process automation (RPA) to manage welfare support systems. Time-intensive, repetitive administrative tasks, such as calculating home care costs, are now performed by an RPA case handler programme. This has reduced the time to process applications for welfare-support applicants from 8 to 20 days to just 24 hours.[18]

Automation can free key staff from routine tasks, improving the employee experience. Just as significantly, it can improve outcomes for the public by reducing wait times and otherwise reducing frictions in standard processes, in turn improving perceptions of government competence.
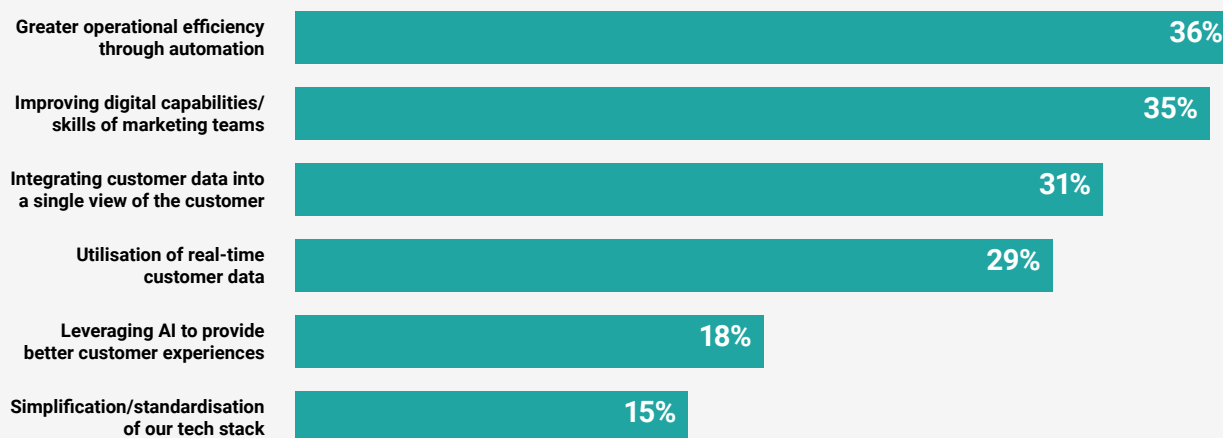
5.2. Shifting to Scalable

The global pandemic and the need to rapidly ramp up digital government services highlighted the value of cloud-based architectures for fast and flexible scaling. Cloud-based digital services flex with demand, thus helping government agencies navigate crunch periods. These included sudden rushes on unemployment and income support services during the pandemic. In less turbulent times, they include tax return deadlines.

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18 https://journals.sagepub.com/doi/full/10.1177/0894439320980434

FIGURE 4

What are your organisation's top operational priorities for improving the customer experience in 2022?

Priority	%
Greater operational efficiency through automation	36%
Improving digital capabilities/ skills of marketing teams	35%
Integrating customer data into a single view of the customer	31%
Utilisation of real-time customer data	29%
Leveraging AI to provide better customer experiences	18%
Simplification/standardisation of our tech stack	15%

Sample: Government/public service middle managers and junior staff (183)

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021

However, this study suggests that only a handful of government bodies are embracing cloud-based benefits. Only 10% of all respondents exclusively use a cloud-based customer experience management platform. 61% use either internally developed platforms or multiple technologies or vendors without a unifying platform (see *Figure 5* below).

This is a missed opportunity. Not only can cloud-native models better strengthen government agencies' abilities to scale, automate, integrate, and innovate services, but they also unlock new opportunities in cost optimisation. For example, cloud models can allow different departments to pay different rates depending on the number of users, helping various agencies benefit from economies of scale while navigating the complexity of government organisational structures.[19]
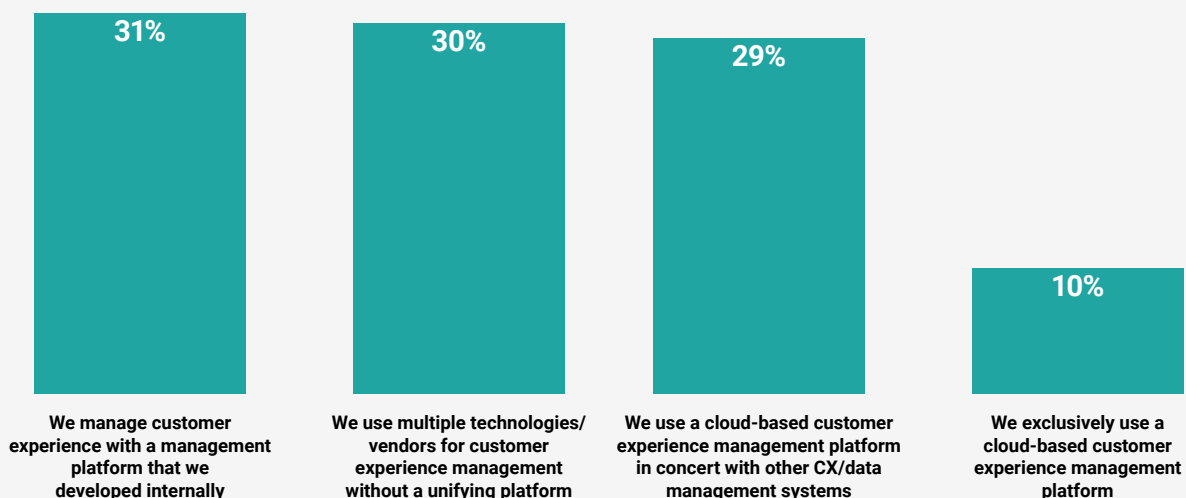
> **"Automation can free key staff from routine tasks, improving the employee experience. Just as significantly, it can improve outcomes for the public by reducing wait times and otherwise reducing frictions in standard processes, in turn improving perceptions of government competence".**
>
> *2022 Digital Trends – Public Sector in Focus, Adobe*

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19 https://www.openaccessgovernment.org/how-government-it-organisations-can-stop-acting-like-a-cost-centre/122475/

FIGURE 5

Which of the following best describes your organisation's approach to customer experience technology?

31%	30%	29%	10%
We manage customer experience with a management platform that we developed internally	We use multiple technologies/vendors for customer experience management without a unifying platform	We use a cloud-based customer experience management platform in concert with other CX/data management systems	We exclusively use a cloud-based customer experience management platform

Sample: Government/public service leaders (42), government/public service middle management and junior staff (299)

Source: Adobe/Econsultancy, Digital Trends Survey, Q4 2021

5.3. Enduring Innovation

Weak competitive pressures, lack of profit motivations, risk-averse organisational cultures, and high leadership turnover haven't made government and public service organisations natural hotbeds for innovation. As we learned from our survey, only 17% of government and public service staff rate their organisation's innovation capabilities eight out of 10. Moreover, 64% of government staff surveyed in this study do not believe their organisations' internal culture encourages innovation.

In a bid to attract digital talent and spearhead digital initiatives, several governments have attempted to build internal innovation hubs free from the cultural trappings of the conventional government. The U.S. Government Digital Service attracts technological talent from the private sector through term-limited 'tours of service' to drive more radical innovation.

However, while governments must welcome vision, external influence, and inspiring talent, they must balance short-term ambition with long-term impact. This means introducing skills, processes, frameworks, and standards that outlive the tenure of visionary technologists and third parties.

In the past, Singaporean government agencies were innovating independently, designing and developing their own siloed digital services to meet citizens' needs. The government recognised that this wasn't a fast or efficient way to innovate. With the introduction of the Singapore Government Technology Stack (SGTS), agencies could tap into a suite of ready-made tools and services hosted on a common infrastructure. Agencies can now innovate easily and quickly while giving citizens a consistent experience across different government digital services.[20]

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20 https://www.tech.gov.sg/products-and-services/singapore-government-tech-stack/
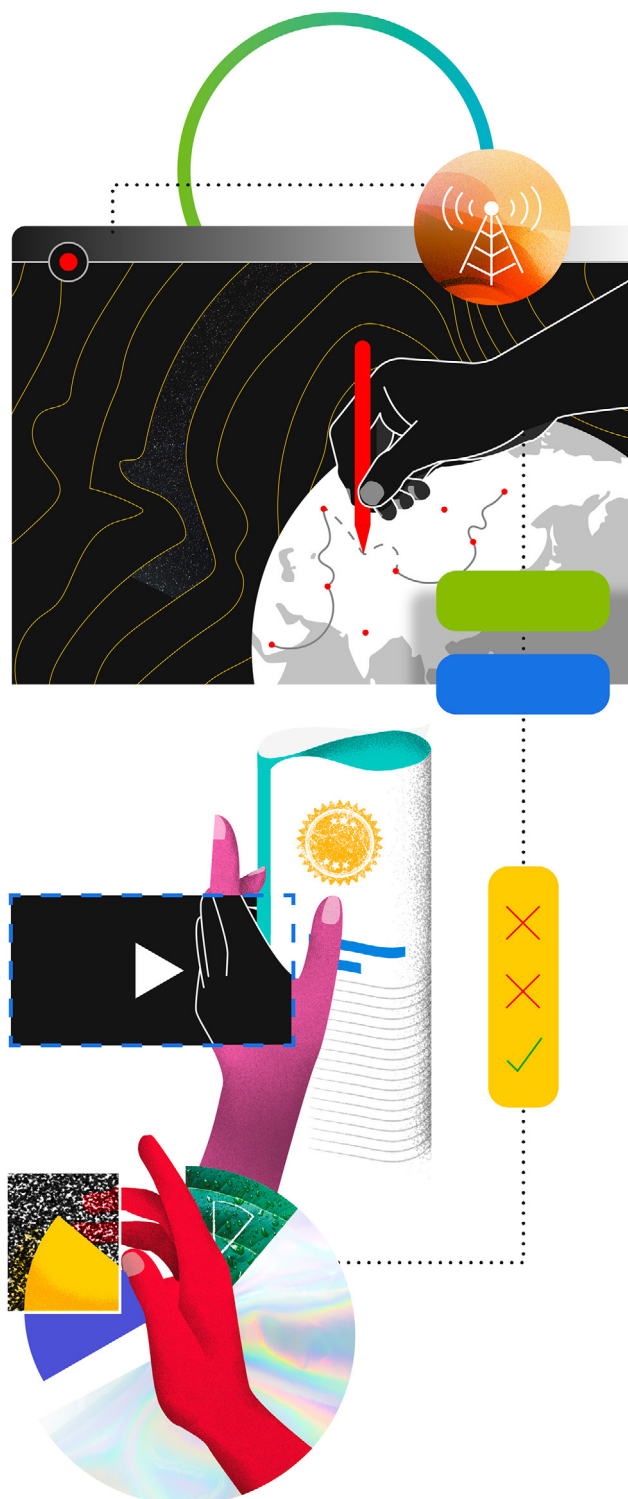
6. Conclusions

REORIENT FULLY AROUND THE PUBLIC AND ITS ANTICIPATED NEEDS

Government and public service digital leaders must bring their digital practices in line with the private sector. This requires a shift from traditional technology-oriented development approaches to user-centric practices. Government agencies need to rapidly familiarise themselves with conventional design-thinking methodologies and forward-thinking techniques, including inclusive and equity-centred design. Digital leaders should strive towards proactive digital services triggered by data signals.

STRENGTHEN SKILLS IN THE LEADERSHIP, DESIGN, AND MANAGEMENT OF DIGITAL INITIATIVES

Government digital leaders in 2022 need to reappraise talent needs in their organisations. They need to identify the skills that need strengthening in-house and deliver dynamic, continuous learning programmes. Such skills are not exclusively hard and fast technical development skills. They also include skills in the leadership, design, management, and analysis of digital initiatives.

DRIVE EFFICIENCY AND EXPERIENCE THROUGH AUTOMATION AND CLOUD INNOVATION

To drive operational efficiencies, reduce administrative burdens, and improve service delivery, government digital leaders in 2022 need to identify opportunities for automation, augmentation or optimisation. They should look to cloud-based digital services that can flex with demand, while controlling agency costs.

7. Methodology

2022 Digital Trends - Public Sector in Focus report is based on a survey of 509 qualified government and public service respondents. The survey was launched on November 11th, 2021, and closed on January 6th, 2022. Information about the online survey was emailed to Adobe and Econsultancy's user base of experience, marketing, and technology professionals. Respondents included 59 senior executives (defined as Senior Directors and higher) and 450 staff (defined as Directors and below).

DEMOGRAPHICS PROFILES:

- By seniority, the most prominent groups include managers (47%), junior executives/associates (26%), directors (6%), and C-level professionals (5%).

- The largest group of respondents came from Europe (54%), followed by North America (33%). Asia, Australia, and New Zealand combined represented 11%.