



Increasing Trust Through Digital Experiences

Citizen Expectations of Government Digital Services in 2020



GOVERNMENT &
PUBLIC SECTOR
PRACTICE

Executive summary

New research indicates citizens are relying more heavily on digital public services during the COVID-19 pandemic.

However, declining levels of trust in government, a lack of confidence in the economic future, and demand for support outstripping the capacity to serve, are all adding strain to governments' relationships with its citizens.

Citizens are clearly signaling for improvements to be made in design, relevance, and relationship online as well as for greater consideration to protecting citizen data while still providing more efficient solutions online.

Creating satisfying digital government experiences appears to be not only a source for more efficiently meeting surging demand, but importantly for building much-needed trust in government.

Background



In 2017 and 2018, Adobe and WPP's Government & Public Sector Practice conducted global research with citizens to better understand expectations of government digital services, how to create more positive experiences, and ultimately improve citizens' trust in government (see [Delivering experiences that count](#) and [Why experience matters in the public sector](#)). Over the past four years, this research has helped inform governments' work to create more functional, efficient, well-designed, and customized digital experiences for its citizens.

But by mid-2020, not only have citizens' expectations evolved significantly, but social unrest, economic disruption, and global social distancing restrictions have led to heightened use and reliance on digital government services. As citizens navigate the health and economic impacts of the pandemic, governments' ability to engage and serve citizens effectively online is more critical than ever.

As with any crisis, trust and confidence in government play a critical role in responsiveness of citizens. An experience with government online, like the collective of other experiences with government and its leaders, either builds or detracts from this trust equity. As nations rebound from the pandemic and build towards ongoing resilience, the ability to improve citizen trust in government is critical.

To better understand how advances in technology since the previous research and the acute reliance on online public services have impacted citizens' expectations, Adobe and WPP's Government & Public Sector Practice have surveyed over 6,000 citizens aged 18 to 64 in six countries: Australia, Canada, Germany, Singapore, the UK, and the USA. The research (fielded in June 2020) provides insight into the expectations and experiences of digital public services today and points to areas for action to improve citizen experiences tomorrow.

COVID-19 response: citizen reliance increasing but trust declining

By early June 2020, over one-third of adults in G7 countries reported their personal income had already been impacted, and one in seven indicated a loss of half or more of their personal income since the start of the pandemic.¹ The International Labor Organization reported 1.6 billion of the world's population work in the informal or gig economy and are at heightened risk of losing their livelihoods.²

This economic instability led to dramatic increases in citizens seeking government support for unemployment, small business loans, and other business continuity measures. In the US alone, more than 30 million people applied for unemployment insurance benefits by the end of May.³ With social distancing measures in place, digital access to government services has been a practical starting place.

The UN reported that by the second week of April, 167 countries had included health guidance and other related information about COVID-19 on their websites. By the last week of March, [gov.uk](https://www.gov.uk) was experiencing 80% increases in site traffic over the prior year⁵ and [Canada.ca](https://www.canada.ca) began seeing over 5 million daily site visitors with the 'benefits' section attracting five times more visitors than other sections of the website.⁶ In Singapore and Australia, a majority of citizens feel they will be living through a recession in 12 months' time.⁷ Citizens' heightened economic and health insecurity have undoubtedly led them to government websites for guidance and support.

Yet, citizens seem wary of the reliability of information related to the pandemic provided by governments. Citizens in G7 countries indicated higher trust in health information about the COVID-19 outbreak offered by TV news (27%) or healthcare providers (27%), well above government or politicians (11%). Although on the whole, 51% of G7 citizens rate their government's communications about the coronavirus outbreak at very/fairly good.⁸

As the crisis and government response to the coronavirus outbreak progressed, trust in government to make the right decisions in the future consistently declined. By June, less than half of G7 citizens approved of their government's response to the pandemic with many citizens feeling the balance between protective health measures and economic stimulus measures has not been right.⁸ Therefore, despite the increased engagement with government in a time of crisis, trust in government does not seem to be improving.

Citizen expectations of digital public services today

Adobe and WPP's Government and Public Sector Practice surveyed over 6,000 citizens aged 18–64 (across Australia, Canada, Germany, Singapore, UK, and USA) in June 2020 to better understand how expectations and experiences of digital government services changed in this period of heightened reliance on digital government services.

As of June 2020, well over one-third of surveyed citizens had accessed a public service online in the past week—a significant increase over prior research. For many of the countries tracked in both research waves, this represents an increase of 50% or more in the volume of people accessing government services online weekly; in one country, usage has more than tripled. Unfortunately, general satisfaction with government online services has shown no notable improvement. In fact, the two services tracked in both surveys—finding employment and tax services—declined slightly in satisfaction.

Significant segments of the population reported using government websites over the prior three months to do one or more of the following:

- Obtain health information or receive healthcare services
- Access tax services
- Apply for unemployment benefits or find employment
- Access online schooling (for themselves or their children)
- Apply for business loans or relief from student loans

Frequency of use highest for information searches, economic support and schooling

Across the services included, roughly three in four online users are seeking government information. Nearly half are also supplying information required when applying for a service or executing a government transaction. For those whose personal income has been affected, reliance on government online services is particularly acute—nearly one in five who visited government websites for unemployment benefits or information reported doing so at least once each week in the three months prior to the survey. Online schooling was also a critical service with more citizens reporting using these services than seeking out government-provided healthcare information.



Citizen expectations of digital public services today

Device usage depends on service requirements

The device in highest use remains a desktop or laptop computer, particularly for more complex transactions like online learning and tax services. Mobile device usage is highest for healthcare information, remote healthcare access, or business services such as applying for business loans. And on average, citizens are using multiple devices to engage with government, not just one.

Governments' citizens in the six countries surveyed are highly digitally engaged (about 95% access the internet daily) and *expect* government to provide services online. A majority of citizens indicated a preference for *all* the government services they require to be available digitally, in part because it would 'make life easier.'

More work to be done in perception of safety of government sites and use of citizen data

Just under half of citizens who took part in the research were confident online government services are very or fairly safe and secure to use, and only 37% were happy with the amount of personally identifiable information (PII) their government knows about them. Citizens expressed a desire for government to create more efficient cross-government experiences such as pre-filling information about the user or suggesting other services or information the user may be interested in.

However, when citizens hold a significant level of concern that government will not use their data appropriately, there remain improvements in perception of government protection of PII to achieve before cross-government solutions can be achieved.

Relatively higher levels of satisfaction with services newly offered during COVID-19 response

Newer needs, with perhaps less defined expectations (like online schooling and remote healthcare), received positive satisfaction ratings with more than half of respondents providing approval of their recent experience. Services directly related to economic security, such as applying for unemployment benefits or business loans, were comparatively less satisfying for users. However, results vary significantly on a country by country basis.



Citizen expectations of digital public services today

No marked improvement in general assessments of digital experiences

The emotive dimensions of online experiences determined to have the greatest impact on driving positive experiences—relevance, relationship, and design⁹—saw little collective change from previous research vs. 2020. When considering like-for-like countries across general services used, roughly half of citizens gave government credit for meeting their experience expectations.

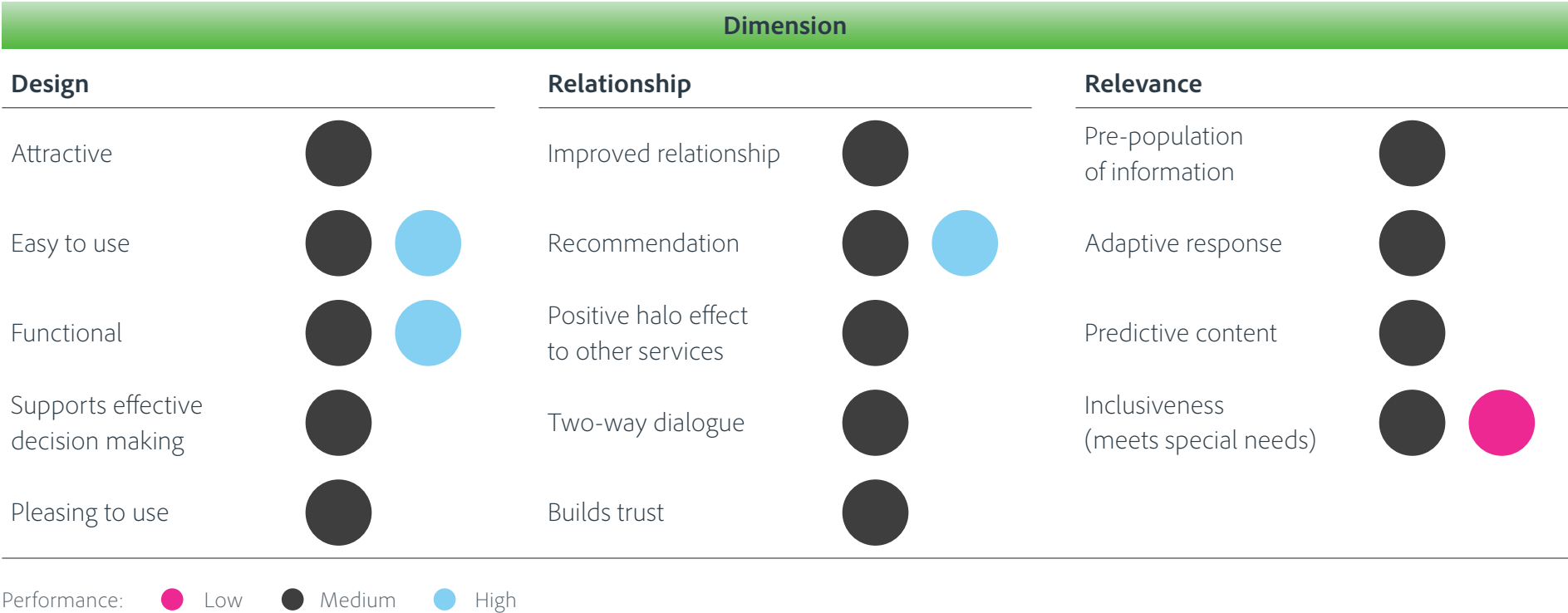


Table 1: All respondents in six countries across eight services. In relation to the government services you used online, to what degree do you agree to having had the following experiences?

Desired improvements to the citizen user journey

Citizens are looking for efficiency improvements in their overall experience of government online services. Functions like saving after each session and being able to instantly access online help/support were the most in demand among the user journey improvements tracked. Making improvements such as these to enable smoother completion of tasks, use of channel of presence, and greater overall efficiency helps to improve the citizens' relationship with government. The following table indicates detailed areas for improvement in the user journey across the range of services evaluated.

	Finding employment	Applying for unemployment benefits	Personal tax services	Loans and support for small businesses	Healthcare information	Student loans	Online schooling/ education	Remote healthcare
Base: Total respondents	1267	884	1986	480	2407	321	908	615
	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Being able to save what I was doing and come back to it later	436	303	746	166	804	114	352	202
	34.40%	34.30%	37.60%	34.60%	33.40%	35.50%	38.80%	32.80%
Being able to switch from one device to another without having to start again	315	174	398	131	542	82	248	158
	24.90%	19.70%	20.00%	27.20%	22.50%	25.60%	27.30%	25.70%
Being sent related information or advice by email or text (e.g. reminders for things I needed or might want to do)	335	244	480	153	638	100	269	203
	26.40%	27.60%	24.10%	31.90%	26.50%	31.20%	29.70%	32.90%
Being offered additional relevant information or services beyond what I was originally looking for	350	210	423	158	665	79	276	181
	27.70%	23.80%	21.30%	32.80%	27.60%	24.50%	30.40%	29.40%
If the service already had some of my information (e.g. if forms automatically fill in my name, address)	292	223	510	150	503	89	216	188
	23.10%	25.20%	25.70%	31.20%	20.90%	27.60%	23.80%	30.60%
Being able to have instant online communication for help and support	392	338	733	168	833	117	340	209
	31.00%	38.30%	36.90%	35.00%	34.60%	36.50%	37.50%	34.00%
If the service flagged when I made a mistake	267	214	548	115	488	68	199	144
	21.10%	24.20%	27.60%	24.00%	20.30%	21.00%	21.90%	23.40%
Nothing could improve my experience	105	94	197	17	281	22	60	36
	8.30%	10.60%	9.90%	3.40%	11.70%	6.90%	6.60%	5.80%

Table 2: All respondents. Which of the following, if any, would improve your experience of using online government services?

Positive digital experiences improve trust in government

On balance, for the services evaluated, more users agreed than disagreed that their digital experience *helped increase their trust in government*. Impact varies by service and country, but business and healthcare services in general appear to have the highest impact on trust in government. To build more positive experiences, more often, government should address the relevance, relationship, and design improvements citizens are asking for.

Today, the ability to efficiently refresh and maintain relevant content on site, more effectively meet citizen needs with capabilities like AI and Voice, appropriately manage PII, and drive awareness of new capabilities and security on site, are more robust than ever. Evidence indicates these are clear pathways to improving satisfaction with government digital experiences and, ultimately, trust in government.

To find out more about country-specific data and insights or improvements to user experiences, contact us at govtpractice@wpp.com or GovPartners@adobe.com

56%

56% of citizens using small business loans or support services reported the online experience increased their trust in government.



6
countries
6002
interviews



Methodology and access to data

Adobe and WPP's Government & Public Sector Practice will provide access to country-specific and service-level data on an individualized basis to public sector leaders. Please contact govtpractice@wpp.com or GovPartners@adobe.com for more information on your country's results, global benchmarking, and further insights on improving digital experiences for citizens.

A total of 6,002 interviews were conducted among adults aged 18–64 living in the nations of Australia (1,001), Canada (1,000), Germany (1,000), Singapore (1,000), the UK (1,000), and the USA (1,001). Fieldwork was conducted between the June 2–6, 2020. All interviews were conducted as online self-completion. All the data has been post-stratified to be representative of the relevant country population with respect to: gender crossed by age group, and gender crossed by degree-holding status.

References

¹Kantar G7 Countries Perceptions of COVID-19 (Wave 1–3)

²International Labor Organization: www.ilo.org/global/lang--en/index.htm

³US Dept of Labor: www.dol.gov/ui/data.pdf

⁴UN COVID-19 Policy Briefing: www.un.org/development/desa/dpad/publication/un-des-a-policy-brief-61-covid-19-embracing-digital-government-during-the-pandemic-and-beyond/

⁵UK.Gov site traffic: www.gov.uk/performance/site-activity/site-traffic

⁶Canada.ca site traffic: www.canada.ca/en/analytics.html

⁷YouGov COVID-19 Brands and Audience Impact, June 2020

⁸Kantar G7 and COVID-19 (Wave 1–3)

⁹Delivering experiences that count, 2017: <https://landing.adobe.com/dam/2017/downloads/whitepapers/ctir-2798.en.delivering-experiences-that-count.pdf>



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