



Moving beyond the basics of digital government with personalization.

A path toward greater agency efficiency and more satisfied customers.

July 2022



Foreword

Building on Critical Connections



Despite perceptions of fraying public trust, American communities rely on government agencies for critical information and assistance. Renewing a passport, enrolling in Medicare, finding polling places, subscribing to public health updates, applying for survivor benefits—the past few years, in particular, have demonstrated how integral access to government services is for all of us.

As the COVID-19 pandemic upended the rhythm of daily life, we saw private companies and public agencies alike embrace remote operations and customer service with unprecedented speed. The path toward digital government services accelerated out of necessity, as evidenced by the priority placed on public-facing digital services in the American Rescue Plan and by Executive Order on Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government.

Now agencies have a choice to make: how can they build on these digital foundations to deliver more efficient, more accessible, more personalized citizen experiences? This report explores how the American public interacts with digital sources of public information today, and critical design principles—mobile, responsive, customized—to enhance service delivery.

Greater personalization of digital services not only brings much-needed speed, convenience, and accessibility to end-users, it also significantly reduces administrative burden, streamlines workflows, and accelerates mission success. We are pleased to partner with Deloitte Digital to help agencies deliver this next generation of digital government services.

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

Enhancing Public Engagement and Trust

As the COVID-19 pandemic and its aftershocks continue to pose tremendous societal, economic, and public health challenges across the country, government agencies have an incredible opportunity to further embrace digital modernization efforts and provide the American people with more personalized, efficient and effective citizen services.



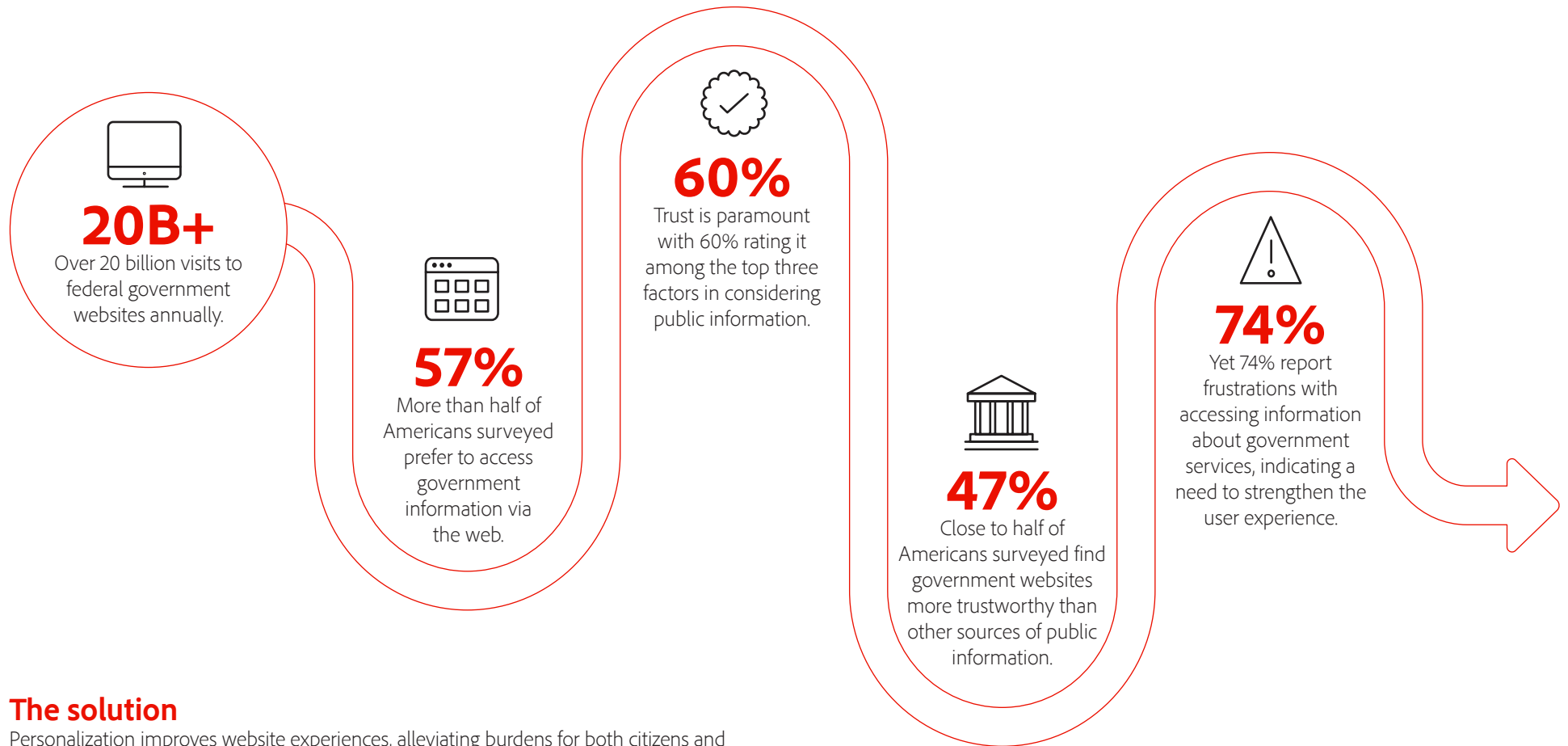
Our latest survey conducted by Deloitte and Adobe captures the public's unshakeable appetite for timely and easy-to-access digital experiences. People want to engage with government agencies online—on their desktops, on their tablets, and on their mobile devices. While federal, state, and local agencies move with deliberate speed to provide constituents with better access to digital documents, electronic records, and cloud services, it's imperative for government leaders to make the digital citizen experience as personalized, as intuitive and as simple as possible.

By offering the American people more efficient, expeditious, and accessible services, government agencies can greatly enhance public trust and strengthen community engagement. And importantly, they can also meet the public's growing expectations for digital service delivery, receiving and accessing citizen services in the same way they receive commercial services—with prompt, customized, and efficacious experiences that get people what they want, when they want it, and how they want it.

Working closely with Adobe, Deloitte supports federal, state, and local government agencies at every stage of their digital transformation journey. **We help leaders personalize the delivery of critical government services and reduce the friction that often comes with digital experiences—too many points of entry, too many account credentials, too many clicks, and too much conflicting information.** We help agencies make an impact that matters and provide the American people with the citizen services and resources they need to build more resilient and more prosperous communities as we emerge from the pandemic.

Jim Constertina
Managing Director, Deloitte Consulting LLP

The opportunity



The solution

Personalization improves website experiences, alleviating burdens for both citizens and agencies alike while increasing confidence in government services.

Nearly

8 in 10

Americans surveyed indicate they are equally or more likely to use personalized government services.

Benefits to government, agency employees, and the public:

- Greater adoption of online government services
- Increased trust and higher satisfaction with government interactions
- Decreased burden on agency employees
- Enhanced service delivery outcomes

Methodology

This report follows a body of research conducted by Adobe and Deloitte to better understand the economic benefits of digital transformation for government agencies and the use of digital experience platforms. The current research draws on insights from subject matter experts, case studies, and a survey of US residents on their use of and attitudes toward sources of information about government services.

Citizen Survey

To support this investigation, a survey was fielded in March 2022 among 1,000 US residents aged 18 and older who had researched or accessed government information or services within the last 30 days. The sample was modeled demographically to US Census records for gender, age, region, and ethnicity. The survey sought to understand:

- What government information people access online
- What methods they use to access information regarding public services
- What roadblocks they experience in seeking this information
- Attitudes towards government sources of information
- Views on personalization of government services

This study has a margin of error of 3.1%.



Digital government solutions that modernize experiences, efficiently deliver services, and increase citizen engagement, while putting people first.



Human-centered design approach to delivering relevant, timely, and sustainable digital transformation solutions for the public sector.

Executive summary

Access to information about public services is an important part of American life, never more so than in the last few years.

There were over 20 billion visits to federal government websites between March 2020 and March 2021, a 57% lift over pre-pandemic levels, according to Digital.gov. In 2022, the reliance on government information has held steady, with 5.6 billion visits within the last 90 days as reported by the General Services Administration. On top of this, the American public makes use of state and local agency sites, whose traffic isn't easily quantified.

To better understand what people experience, expect, and hope for when they seek out information about public services, Adobe and Deloitte Digital engaged the Dialog Group to survey 1,000 US residents who researched government information or services via any source over the prior 30 days.

The research found that, indeed, Americans are searching for public information on average 1–2 times per week, and websites are essential, with 57% rating it their top access method and 42% indicating they'd preferred to use government websites and apps more in the future.

Our study found that Americans are looking for trusted resources with up-to-date and easy-to-understand information. With 47% rating government websites as more trustworthy than other sources of public information, a foundation of trust between citizens and agencies exists which can be cemented further through effective digital delivery of services.

While government agencies have long been engaged in digital transformation, and the COVID-19 pandemic accelerated these efforts, the research found that barriers and frustrations persist, with a majority citing long hold times, uncertainty about hearing back, being directed to multiple websites, and too many passwords.

Serving the public requires meeting people where they are at, and the future is increasingly online and mobile. When asked what would make government services easier to access, one-third of respondents provided suggestions related to improved website and mobile applications.

Tailoring government websites and apps to users via personalization can reduce the friction associated with navigating services online, and close to 8 in 10 of those surveyed indicated they'd be equally or more likely to use personalized government services. As an avenue to improve the citizen experience as well as reduce workloads and improve reach of services, personalization is a tool that any agency delivering information and services online must consider.

Table of contents

Foreword.....1

Opportunity.....2

Methodology.....3

Executive summary.....4

Government information is5
essential to daily life.

Government agencies are6
a primary resource.

The digital imperative.....7

Build for inclusion.8

Focus on accessibility of public
health information.....9

Perceptions of government services.10

What people want: Resources
they can rely on.....11

The future is mobile, responsive,
and customized.12

Personalization: A path to
improved interactions.13

Reducing friction with improved
online service delivery.14

Personalization is the next step
in an ongoing evolution.....15

Government agencies around the world are
moving towards greater personalization.....16

Cross-cultural comparison.17

Rethinking roadblocks.....18

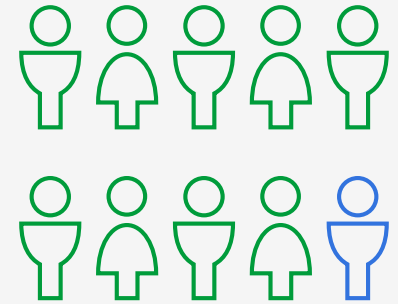
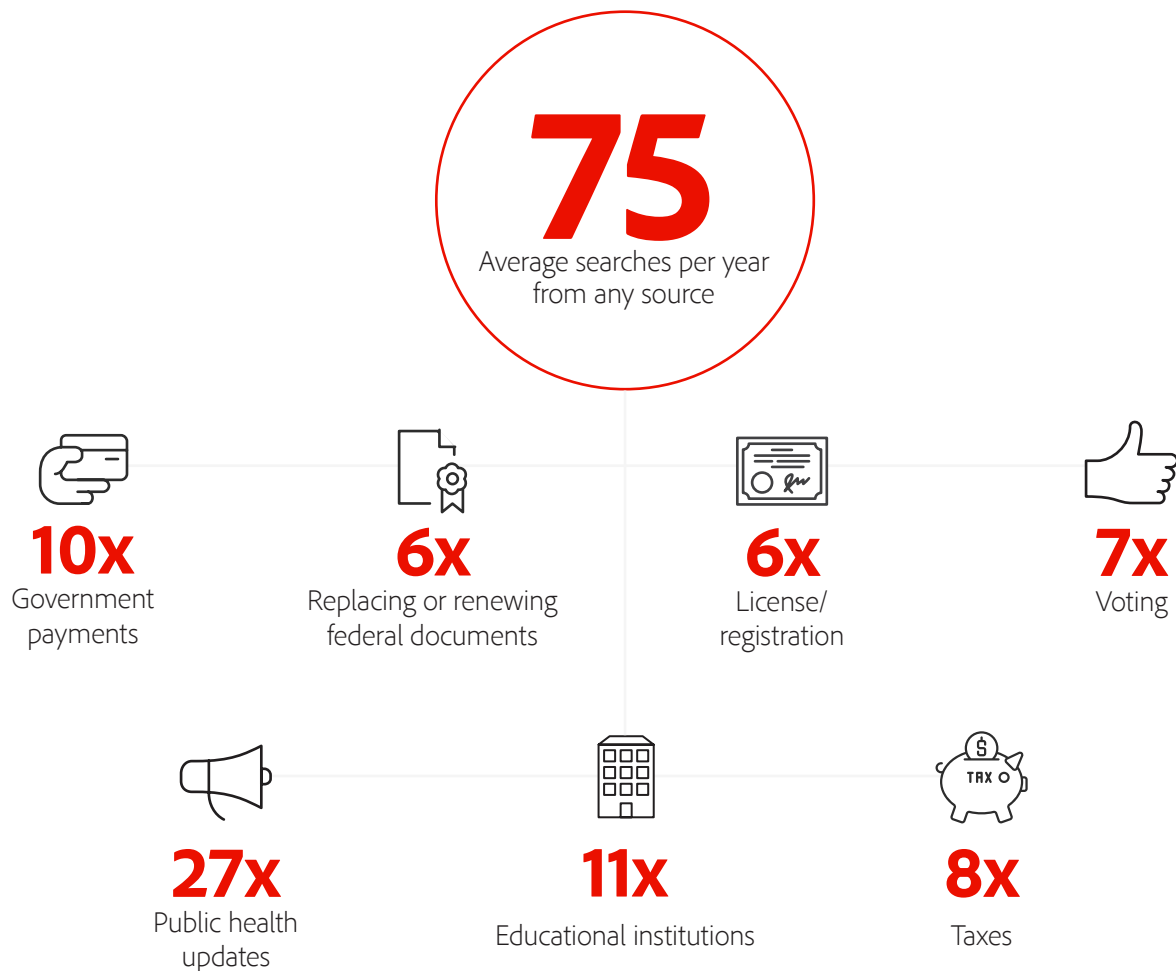
Personalized services in action.....19

Government information is essential to daily life.

Americans rely on information about government services and matters of public interest.

Those surveyed search for information on government services 1–2 times per week. Half of those searches are related to public health updates and educational institutions.

Note: this study surveyed Americans who have accessed information about government services via any source within the last 30 days.



9 in 10

Americans surveyed seek out information about the following public services from **any source**:

Federal documents

License/registration

Public health updates

Taxes

Voting

Government agencies are a primary resource.

Government sources and search engines account for the bulk of searches on public services.

While people utilize a range of resources for information about government services, on average, 2 in 5 seek out government sources first across topics surveyed.

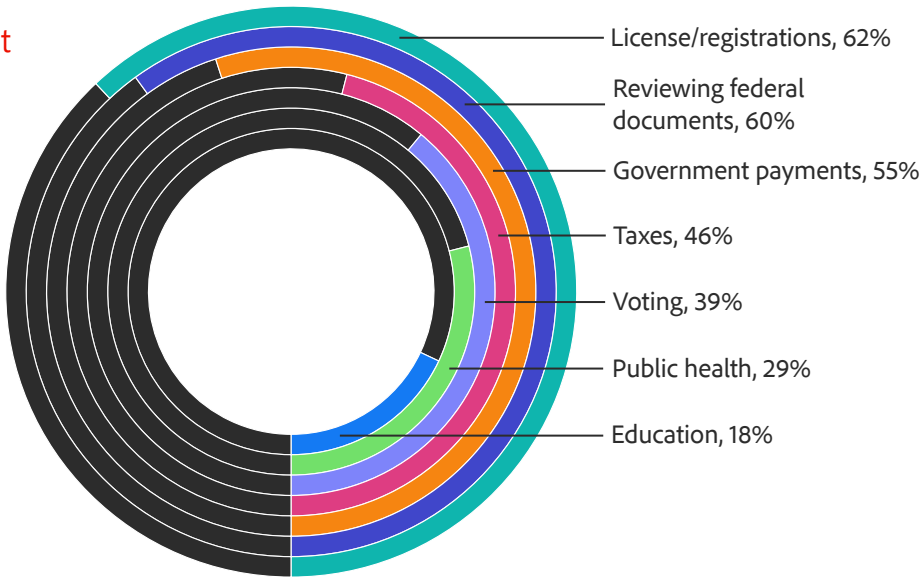
More than half of people surveyed go to government sources first for information on licenses and registration, renewing or replacing federal documents, and government payments.



Top government domains visited in the last 30 days.



Percent who go to government sources first when searching for information about the following types of public services:



¹Based on Federal Web in the Year of COVID-19 report.
²Based on Analytics.usa.gov statistics as of 4/13/22.

How people search for information on government services (aggregated):

Directly from a government agency (including online, in person, phone), **44%**

Search engine, **25%**

Don't look for this type of info, **10%**

Family and friends, **4%**

Social media, **4%**

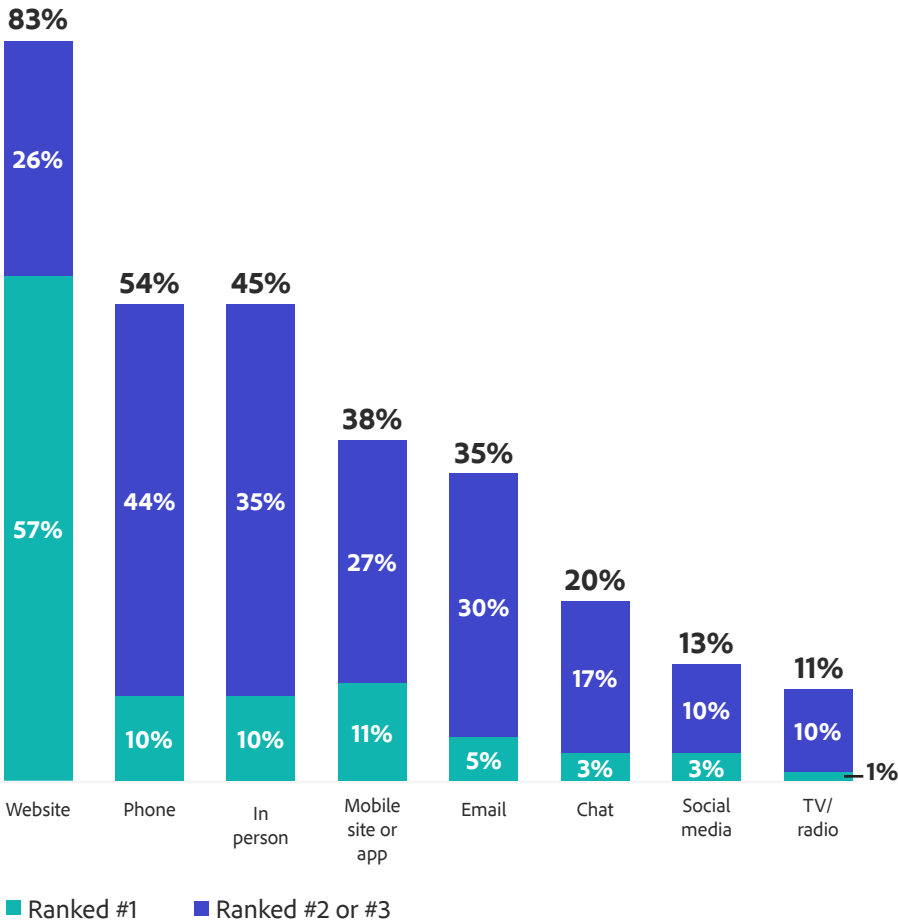
The digital imperative.

Websites are preferred, followed by phone, in person, and mobile.

More than half of people surveyed indicate the web is their top tool when seeking government information. Nearly **4 in 5** rely on digital methods (web, mobile, email, chat, and social) as a first-choice resource.

Younger respondents are **twice as likely** to show a preference for using mobile sites or apps. Of those under 55, 47% include mobile in their top three methods, compared to 23% of those 55 or older. They're also more interested in engaging with government, with a net of **75%** indicating they'd prefer to use at least one channel more often in the future, vs. 54% of those 55 and older.

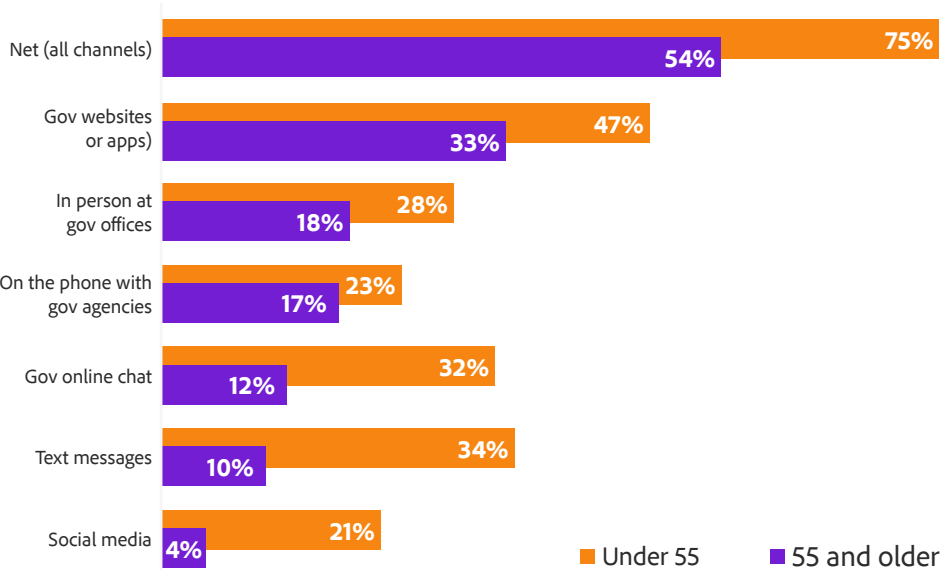
Top ranked methods for seeking information about government services:



#1 top-ranked access method by age group:

| | Under 55 | 55 and older |
|---|----------|--------------|
| Website | 49% | 70% |
| Phone | 11% | 9% |
| In person | 10% | 9% |
| Mobile site or app | 14% | 5% |
| Other digital methods (email, chat, social media) | 14% | 7% |
| TV/radio | 2% | <1% |

Access methods preferred in the future:



Build for inclusion.

In-person and phone touches are preferred by some demographics, indicating today's digital government may not be inclusive enough.

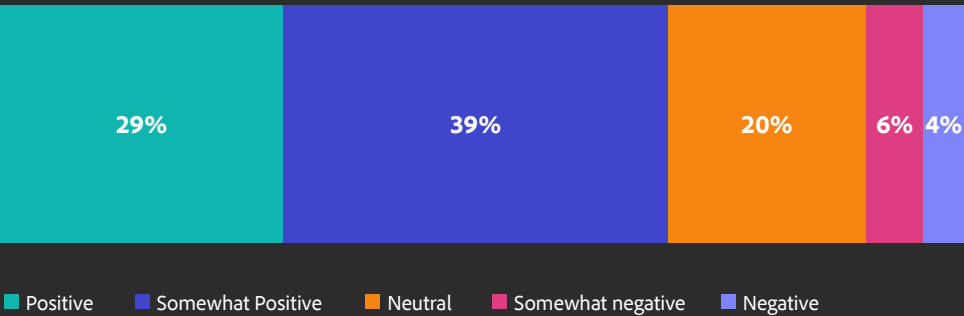
While websites are preferred by all groups as a method of obtaining information about government services, those with lower education levels, lower incomes, located in the South, and self-identified as Black and Latino are less likely to indicate the web is their first resource, and at least directionally more likely to rely on in-person interaction.

While more research must be done to uncover why, this indicates government websites may not be currently designed to meet the needs of all users.

#1 top-ranked access method by demographic:

| | Website | In-person |
|--------------------------------|---------|-----------|
| Total | 57% | 10% |
| South | 52% | 12% |
| <\$100K HHI | 52% | 11% |
| <Bachelor's degree | 51% | 12% |
| Black | 45% | 15% |
| Latino | 44% | 15% |
| Second language spoken at home | 43% | 13% |

Perception of government source accessibility on last visit:



15% of respondents indicate accessibility is among their top three factors in choosing where to access information about government services, with men more likely to prioritize this factor than women (17% vs. 13%).

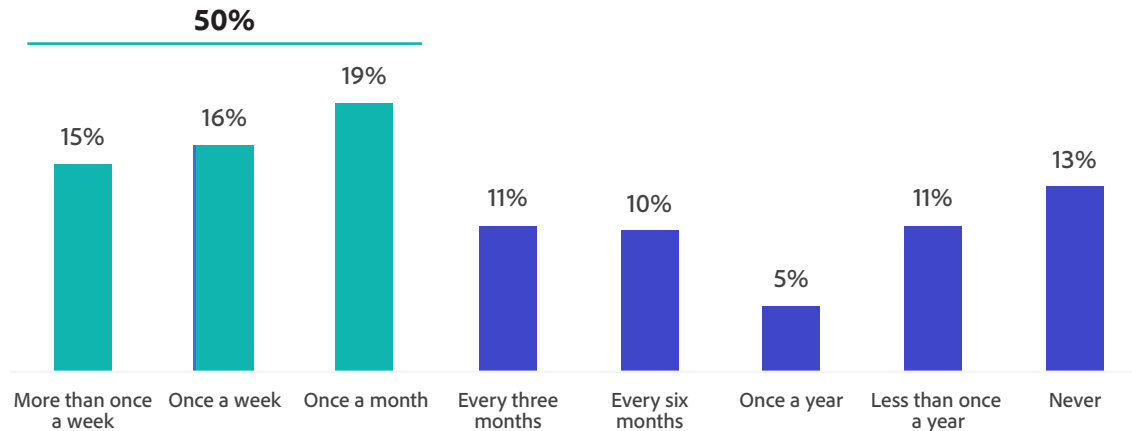
While close to 7 in 10 of the general population surveyed hold positive perceptions based on their last visit to an online government resource, further research must be conducted to determine if government websites are meeting the needs of those who require accessibility features.

Focus on accessibility of public health information.

Americans frequently access public health information, but government sources aren't necessarily their first stop.

1 in 2 people surveyed access public health updates at least once a month. However, while public health is frequently sought after, people are equally likely to turn to their favorite search engine as they are to seek out a government resource.

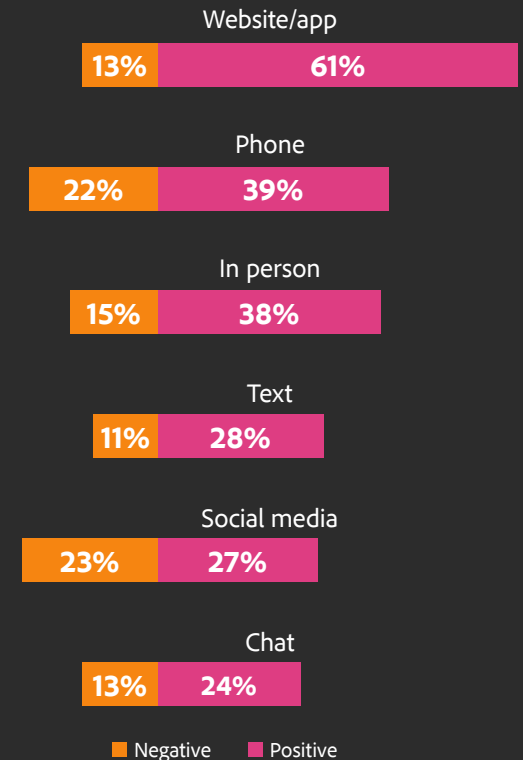
Frequency of accessing public health updates from any source:



First source for public health updates:

| | |
|-----------------|-----|
| Government | 29% |
| Search engine | 28% |
| TV/radio | 9% |
| News/newspapers | 8% |
| Social media | 8% |
| Other | 10% |

Perceptions of the following government information sources during COVID-19:



When it comes to meeting the public's need for information during the COVID-19 pandemic, perceptions of government websites or apps are far stronger than those of other government resources.

Perceptions of government services.

Government information sources are used frequently and well-regarded overall, but frustrations persist.

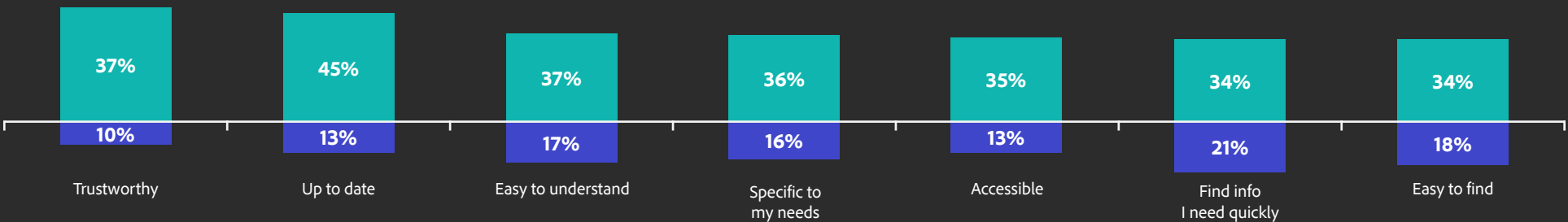
While government resources are well-utilized, user perceptions are complicated. A net of **74%** of those surveyed report frustrations including long hold times, being unsure when they'll hear back, being directed to multiple resources, and too many passwords to remember.

Government resources are held in relatively high regard compared to other sources of public information, with **close to half** viewing them as more trustworthy and up to date.

Perceptions of government sources of information:

| Positive | Negative |
|---|---|
| Information is easy to understand63% | Long hold times81% |
| Personal data is stored securely62% | Not sure when they'll get back to me68% |
| Information is clear regardless of service60% | Directed to multiple websites/transferred59% |
| Services are proactive56% | Too many passwords52% |
| I find what I'm looking for on first try46% | I get conflicting information from different sources46% |

Perceptions of government resources compared to other sources of public information:



■ Much/a little better ■ Much/a little worse

What people want: Resources they can rely on.

People are looking for trustworthy, up-to-date information that is easy to use.

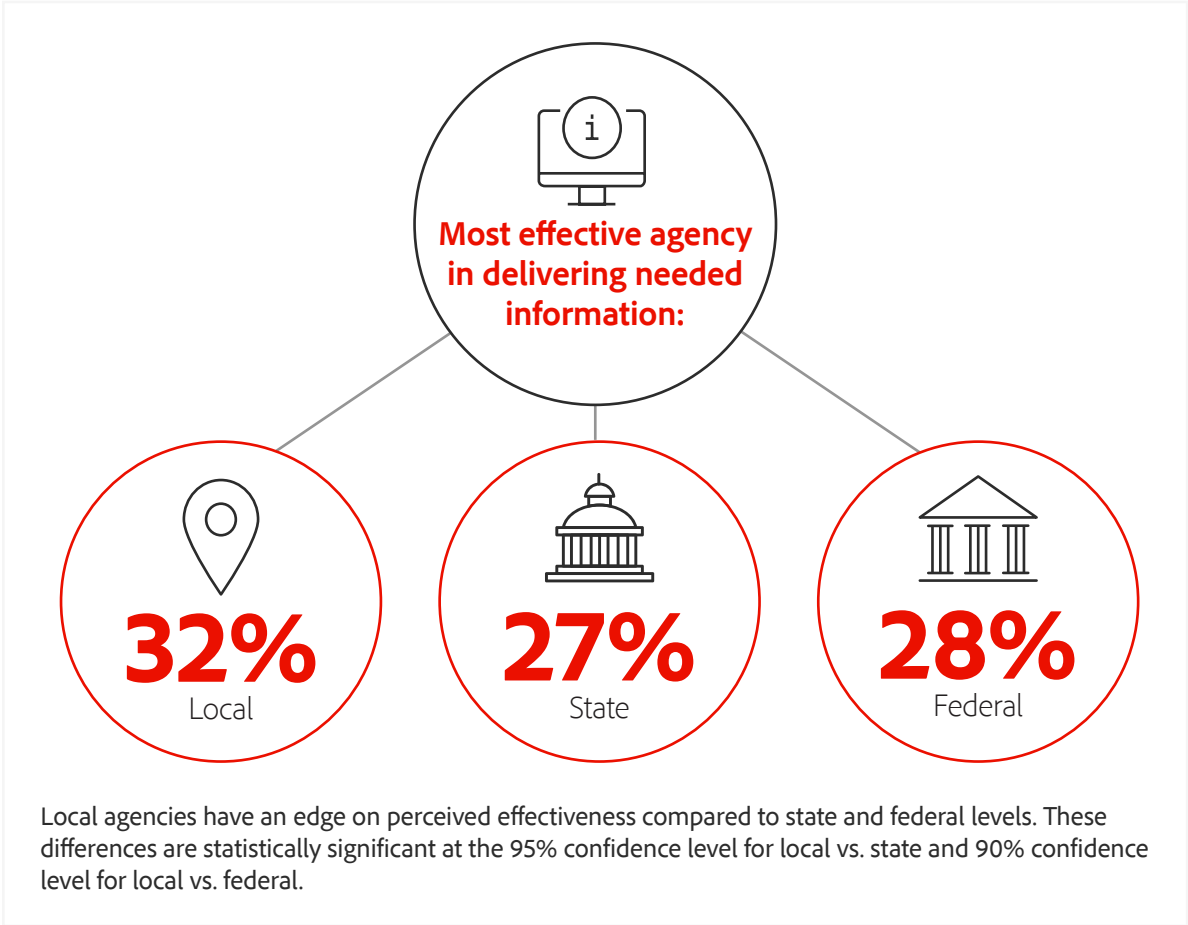
Trust is paramount. It's the most important factor when accessing information about government services across all age groups, and **3 in 5** rate "trusted source" among their top three factors, with women more likely to do so than men (63% vs. 56%).

The majority of people surveyed indicate confidence in government resources, with **67%** rating trust in the information they received on their last visit to an online government resource positively. However, only **47%** view government websites as more trustworthy than other sources of public information, indicating there is room to further strengthen public confidence.

Up-to-date information and factors related to ease were also among the top five considerations. Data privacy is not a major consideration for most, with **29%** rating it among their top three factors in choosing a resource.

Most important factors in accessing government services (percent ranking among top three):

| | |
|---------------------------|-----|
| Trusted source | 60% |
| Most up-to-date | 49% |
| Easy to understand | 41% |
| Available free | 38% |
| Quick/easy | 31% |
| Data stored ethically | 29% |
| Option to talk to someone | 20% |
| Accessibility options | 15% |
| Preferred language | 10% |
| Top search result | 7% |



The future is mobile, responsive, and customized.

Serving the public means moving the online user experience forward.

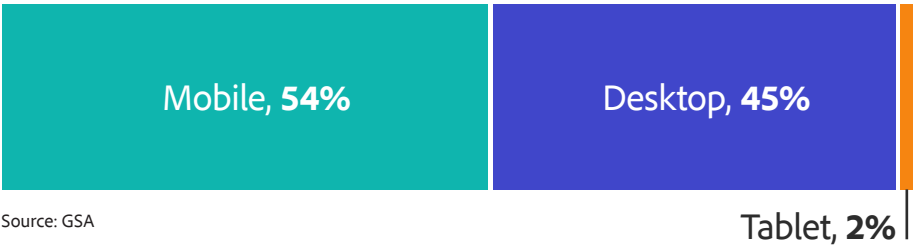
Between the influence of consumer expectations, the remote-work reality of the COVID-19 pandemic, and federal mandates, agencies are finding themselves in a paperless or paper-light reality. While broadening the scope of digital services is an important step, successful delivery of those services requires meeting users where they are at.

Of those accessing government websites today, 54% do so via mobile devices, according to government data. Among those surveyed, the preference for mobile as a first resource is higher among those aged 54 and under (14% vs. 5% of older participants). Of those 55 and older, 70% indicate the web is their top choice resource.

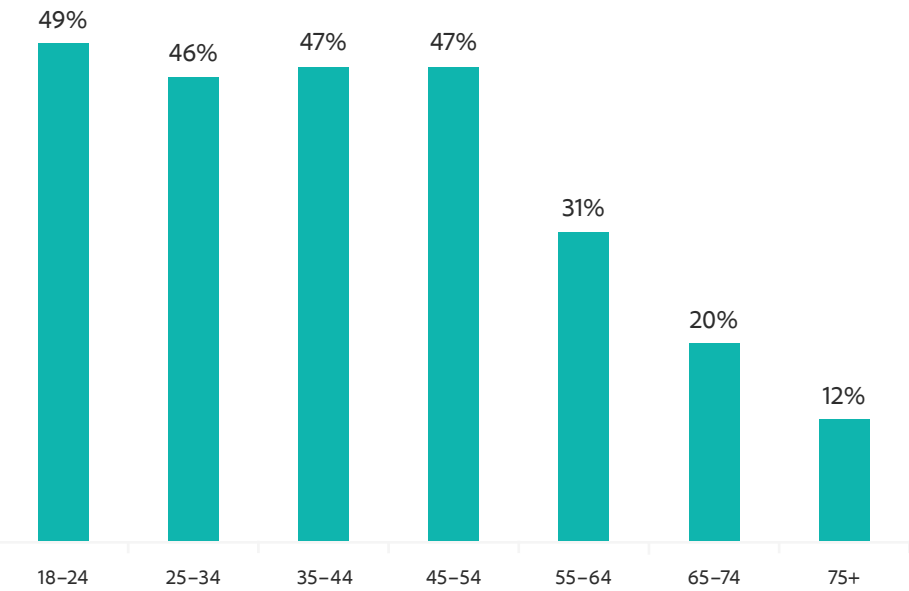
Women are also more likely to include mobile among their top three preferred access methods (42% vs. 33% for men), as are those with young children or full-time jobs, indicating mobile is an avenue to reach those short on time.

Delivering services via mobile requires responsive sites and apps. Customization offers an opportunity to further reduce some of the frictions associated with navigating via small screens.

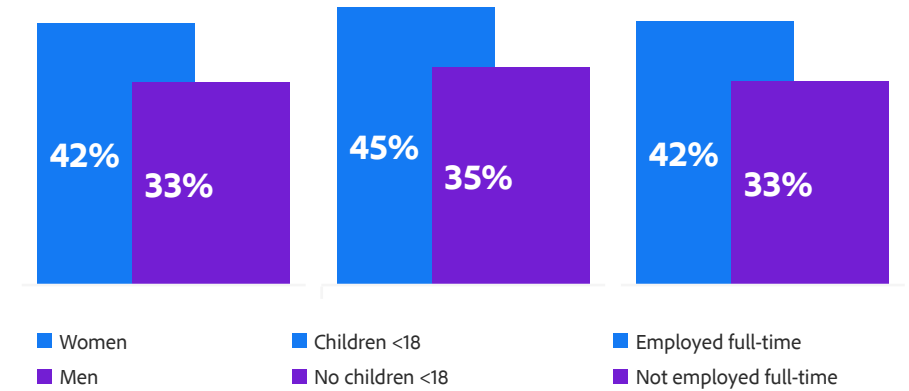
Device used to access government websites:



Mobile among top three access methods:



Mobile among top three access methods by subgroup:



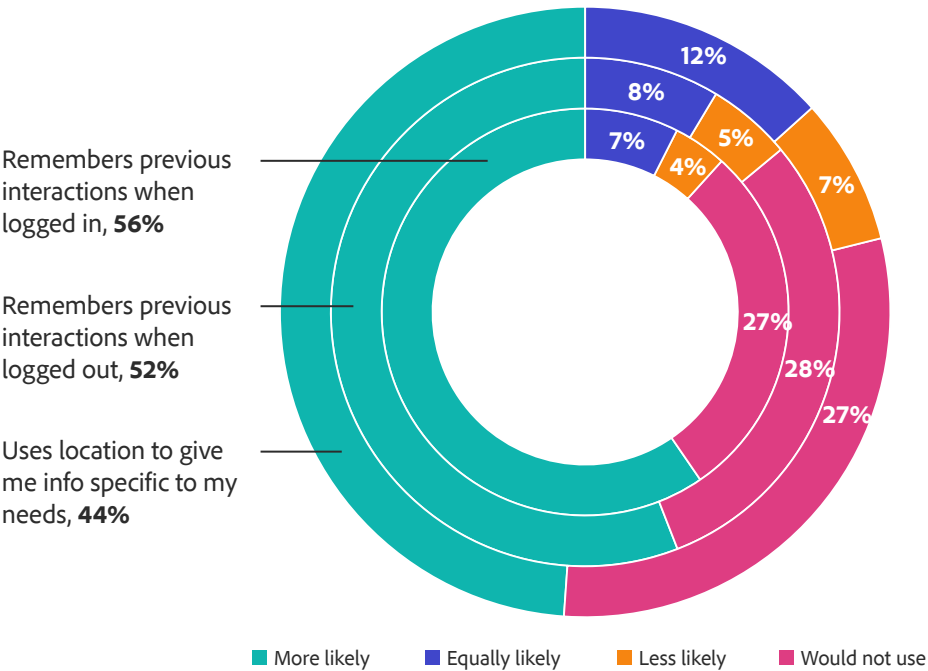
Personalization: A path to improved interactions.

Personalizing access to information offers government agencies a way to build trust and reliability.

By using information shared by a person and their online behavior, government agencies can deliver a relevant, connected digital experience. Common in the private sector, personalization provides an avenue for improved interactions with those accessing government resources online.

When presented with examples of personalization options, nearly **8 in 10** people surveyed indicated they would be equally or more likely to use personalized government services, with interest highest in the ability to remember prior interactions when logged in, and lowest for delivery of location-specific information.

Interest in using personalized government services:



“

“I fully trust the government in handling my data.”

“I just don’t want my info sold to advertisers.”

“I have concerns about all websites.”

“Never thought about it.”

What about data privacy?

When asked about concerns regarding how their personal data is used on government sites, **68%** had no concern or no response.

Among the 32% who voiced concerns, the most common worries were security or privacy (10%), data being sold, shared, or used without permission (7%), hacking or breaches (7%), and surveillance (2%), indicating clarity about how data will be used and protected is essential.

Reducing friction with improved online service delivery.

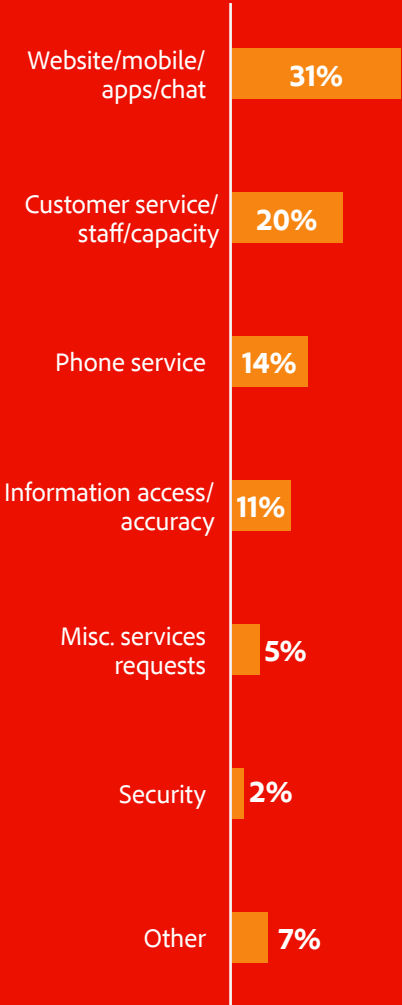
One-third of those surveyed want agencies to improve their websites and mobile apps.

Shorter wait times, easier navigation, and modernizing mobile experiences are among the top suggestions from those surveyed on how to improve government services. Personalization offers users the ability to opt in for streamlined, relevant delivery of information in order to improve access to digital government services.

What steps would you like to see government agencies take in order to make services easier to access?

- “More use of technology to reduce paperwork and having to do things in person.”
- “Better ways to click on another site to take the next step for information.”
- “Would love to see apps for cities, states, and towns to easily access your information and have live chat to assist with questions.”
- “Just make it easier to get things done via the Internet.”
- “One easy to navigate website. A hub that leads to every branch of government.”
- “More emphasis on user experience and remote service offerings.”

What steps would you like to see government agencies take in order to make services easier to access?



Personalization is the next step in an ongoing evolution.

Government mandates are moving agencies towards digitally fluent workflows.

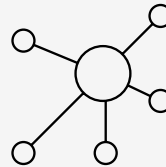
The [2021 Executive Order on Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government](#) mandates a focus on modernized services that are simple to use, equitable, transparent, protective, and responsive.

In addition, “Delivering Excellent, Equitable, and Secure Federal Services and Customer Experience” is Priority 2 on the [President’s Management Agenda](#), with the goal of moving from last to the top 10 in Forrester’s Customer Experience Index ranking.



Per [21st Century IDEA](#), agencies are tasked with improving the digital customer experience by:

- Modernizing websites using human-centered design methodologies
- Digitizing agency services and forms
- Modernizing records management
- Updating network in infrastructure and mobility capabilities
- Accelerating the use of electronic signatures



Agency-specific initiatives currently in progress include:

- **Treasury:** New online tools and services to ease payment of taxes
- **Interior:** Centralized permitting system for Fish and Wildlife
- **Healthcare:** Personalized online tools and expanded customer support options for Medicare
- **VA:** Provide digital services through an integrated digital platform
- **NARA:** Federal agencies required to move from paper to electronic records

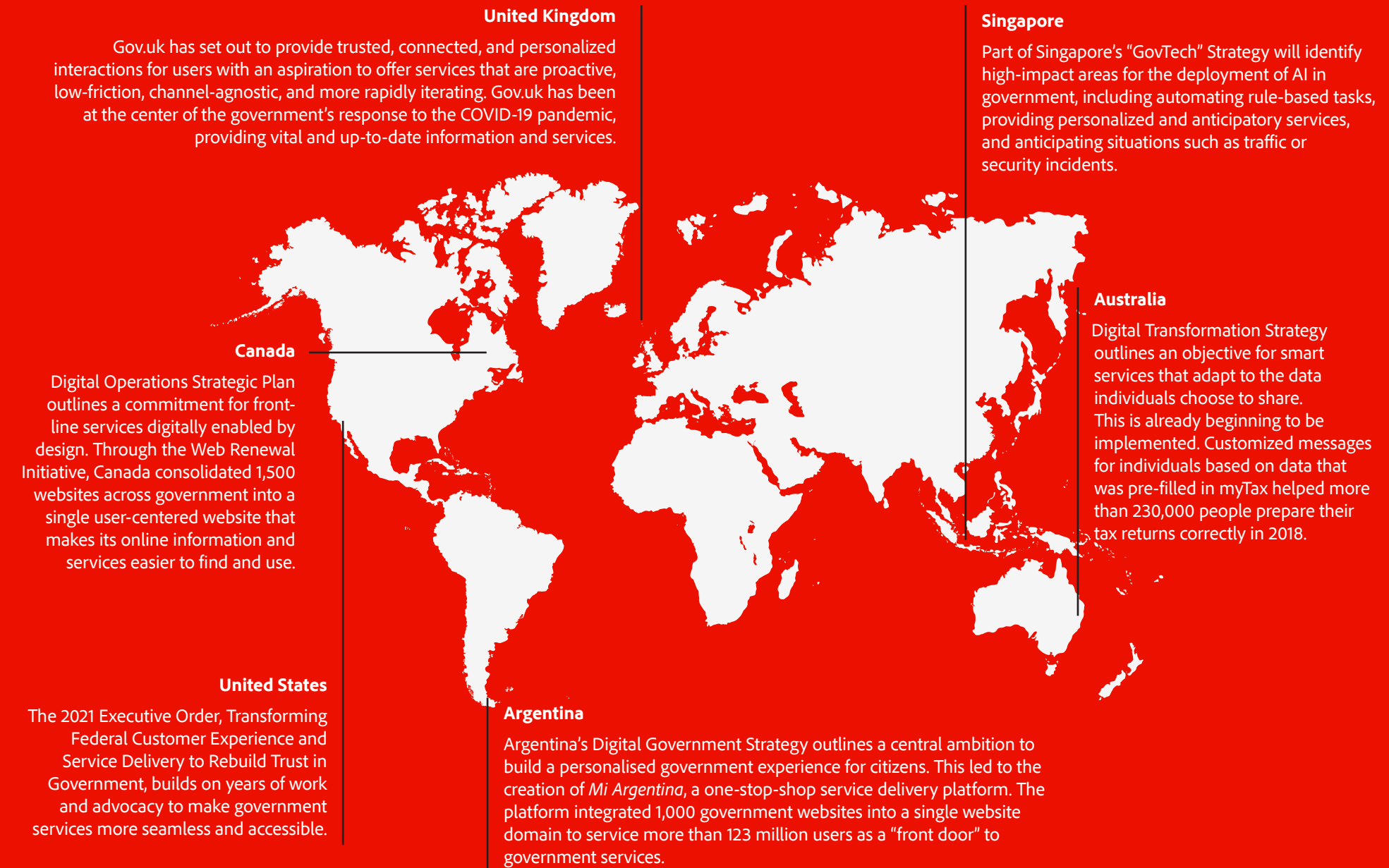


Transparency and accountability initiatives include:

- [OMB Circular A-11 Section 280](#) requires 35 high-impact agencies to track and report on CX metrics; a selection of this data is [available to the public](#)
- [A Federal Customer Experience Blog](#)
- Constituent input into [journey maps](#) to help refocus services on life experiences, such as surviving a disaster or planning for retirement

Government agencies around the world are moving toward greater personalization.

Around the world, government agencies are using personalization technologies to reduce friction and increase ease of delivering government information and services online.



Cross-cultural comparison.

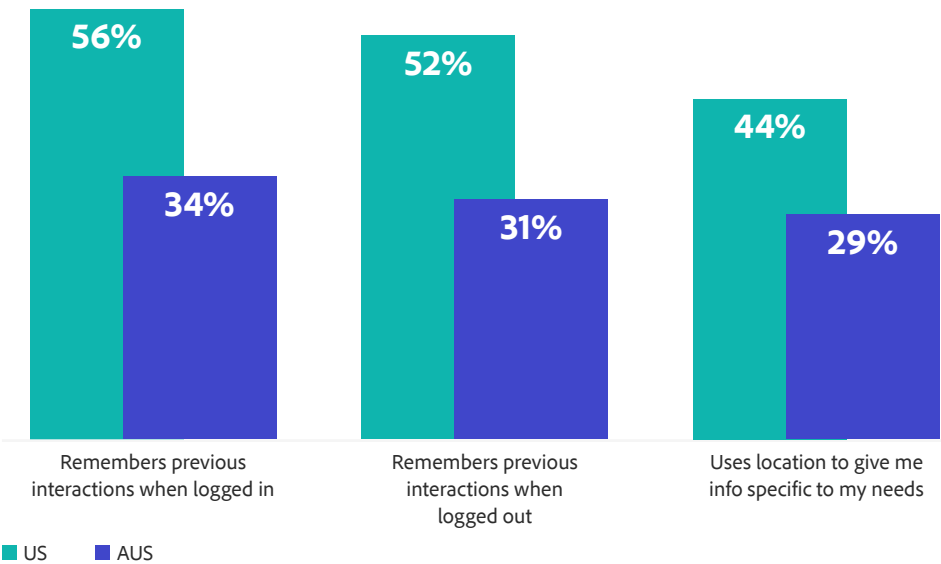
A study by Adobe and Deloitte found consistent themes on personalization of government services across the Pacific.

A 2021 survey of Australians found that information about public services was widely accessed, trust is a top factor in considering where and how to access information, and that interest in personalization is strong—all results echoed in the current US.-based research findings.

Where Americans differ:

- Less likely to see government websites as more trustworthy than other sources of public information
- More likely to report friction or frustration (long hold times, unsure when they'll hear back, directed to multiple sites or transferred)
- Stronger interest in personalized services

More likely to use personalized government services:



| | | |
|--|-----|-----|
| Prefer to access government information through website | 57% | 56% |
| "Trusted Source" is a top 3 consideration in seeking information about public services | 60% | 60% |
| Government websites are more trustworthy than other sources of public information | 47% | 58% |
| Have sought information about taxes | 94% | 84% |
| Have accessed public health updates | 93% | 70% |
| Long hold times | 81% | 75% |
| Not sure when they'll get back to me | 68% | 59% |
| Directed to multiple websites or transferred/ have to go to multiple sources | 59% | 22% |

Rethinking roadblocks.

Digital technology has improved citizen-government interaction by extending the reach of services and streamlining cumbersome processes. Personalization offers an avenue to better serve individuals and reduce the workloads of agency employees, improving both citizen and employee satisfaction.

| Perception | | Reality |
|---|---|--|
| It's not necessary | > | Private sector experiences are shaping public sector expectations, and roughly half of those surveyed are more likely to use personalized government services. |
| It's too expensive | > | Personalization is scalable and includes techniques of varying cost and complexity. Organizations can start small with commercial off-the-shelf solutions. |
| Legislation makes it difficult | > | Mandates such as the 2021 Executive Order on the federal customer experience and the President's Management Agenda support or require providing users with a more customized experience when interacting with web forms, applications, or other digital services, and an improved user experience overall. |
| There are data privacy or security issues | > | FedRAMP-certified personalization solutions meet or exceed the security requirements of most government agency workloads. And, according to a Deloitte Access Economics report on improved services, enhanced data security is cited by a third of respondents as a benefit of public cloud. |
| It's a marketing tool | > | While personalization is used widely in the private sector for marketing purposes, it can be utilized by agencies to improve accessibility and flexibility of digital government services. |



Case Study: Securing National Data

The [U.S. Census Bureau sought to reduce barriers to participation](#), making it easier for people to self respond through a new online option.

Adobe Experience Manager offered the security, scalability, uptime, and robust features needed to pull off the online census without a hitch.

Safety and uptime were other major factors in the Bureau's decision to partner with Adobe.

Because Adobe Experience Manager Managed Services is [FedRAMP certified](#), it passed the high levels of scrutiny necessary for government websites.

And because it's a cloud solution, the 24/7 monitoring added a layer of safety and security that was vital to collect a tremendous amount of Census data in a short window of time—especially during high-traffic moments.

Source: Adobe Blog

Personalized services in action.



The City of Sacramento saw a [30% increase in subscribers and a 24% campaign open rate](#) by consolidating email campaigns and using personalization to craft unique emails for distinct populations with Adobe Campaign.



When the CDC's web traffic ballooned from [3.2M to over 65M daily page visits](#) during the COVID-19 pandemic, deploying Adobe Analytics provided insight to guide content creation and Adobe Campaign to manage multi-channel communications with 2M subscribers.



The Los Angeles County Department of Social Services streamlined their site from [600 to 200 pages](#) while making it easier to find essential content and adding mobile support.

How personalization helps:

Personalization takes information shared by a person and their online behavior to deliver a relevant digital experience connected across various channels. Examples include:





Sources

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