



The digital citizen

A global survey of how people perceive government digital services

Table of contents

03

Introduction

04

Five key findings

05

Few respondents frequently access government through digital channels—and when they do, satisfaction is low

11

People are open to emerging technology but face challenges using existing digital services

18

Perception is a challenge—many respondents don't see enough benefit from digital services

23

Improving customer experience is key to building trust

30

Recommendations

31

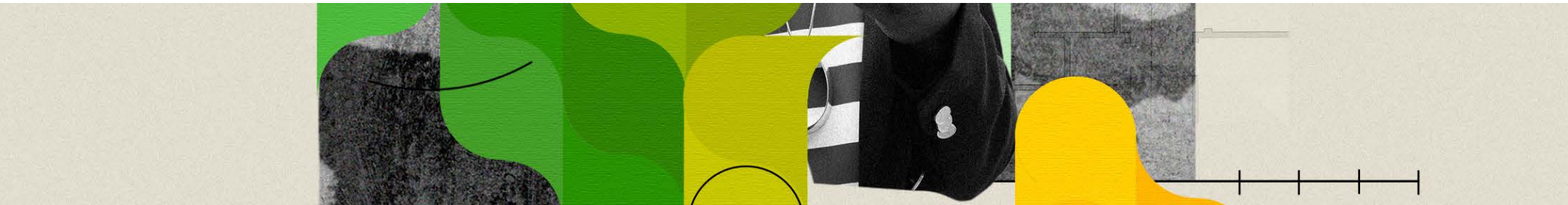
Methodology

Introduction

Digital government services are increasingly important in meeting constituents' needs

To better understand how individuals perceive digital services provided by government agencies, Deloitte surveyed 5,800 people to understand their use of government digital services in 13 countries. The survey results are weighted for age, income, and gender.

This summary of the findings aims to unpack citizens' perception of government services vis-à-vis the private sector and drivers and challenges in accessing public services digitally. It also considers the enablers of digital services, such as digital identity, willingness to share data, and trust in government to ensure data privacy and security.



Five key findings

Key finding 1

Few respondents frequently access government through digital channels

Only 25% of respondents regularly (often + always) interact with government through digital channels, leaving governments with a long journey ahead to increase the availability of digital services and boost adoption.

Key finding 2

Satisfaction lags the private sector

For respondents, satisfaction with digital government services globally lags far behind those of private sector services.

Key finding 3

Websites are preferred but hard to navigate

Most respondents prefer to interact with government through websites. However, difficulty navigating government websites was cited as the biggest challenge while accessing digital services.

Key finding 4

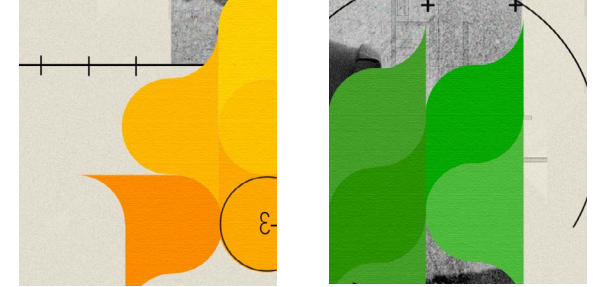
Big demographic differences in usage

Significant differences exist between respondents who frequently use digital services and those who don't based on age, income, geography, and education, potentially raising concerns about access to and the equity of digital services.

Key finding 5

Reasons for optimism

- Respondents are open to sharing data with government when there is a clear benefit.
- Better user experience can lead to higher satisfaction and trust in government.
- The three biggest challenges cited by respondents when accessing government services are areas government can control: user experience, privacy, and security.





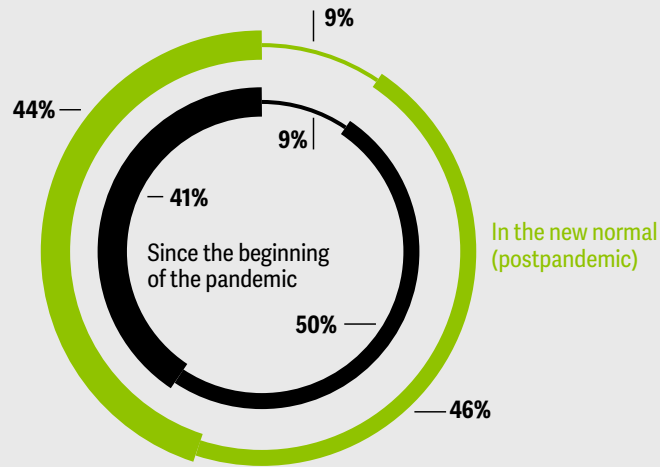
Few respondents frequently access government through digital channels—and when they do, satisfaction is low.

The pandemic increased respondents' use of digital services. Going forward, anticipated usage is expected to vary widely by country.

The pandemic accelerated government's digital transformation efforts and changed the way many citizens access government services. COVID-19 turned out to be a tipping point for digital government services.

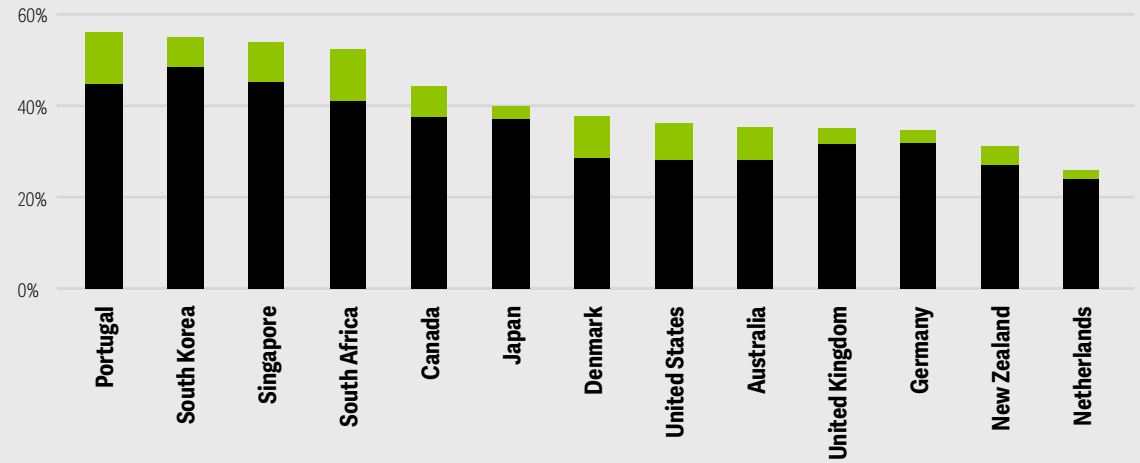
Change in the use of government digital services

— Decreased ■ Remained the same as before the pandemic ■ Increased



How will your use of digital services change in the future as we begin to enter the new normal?

● Increase ● Increase significantly

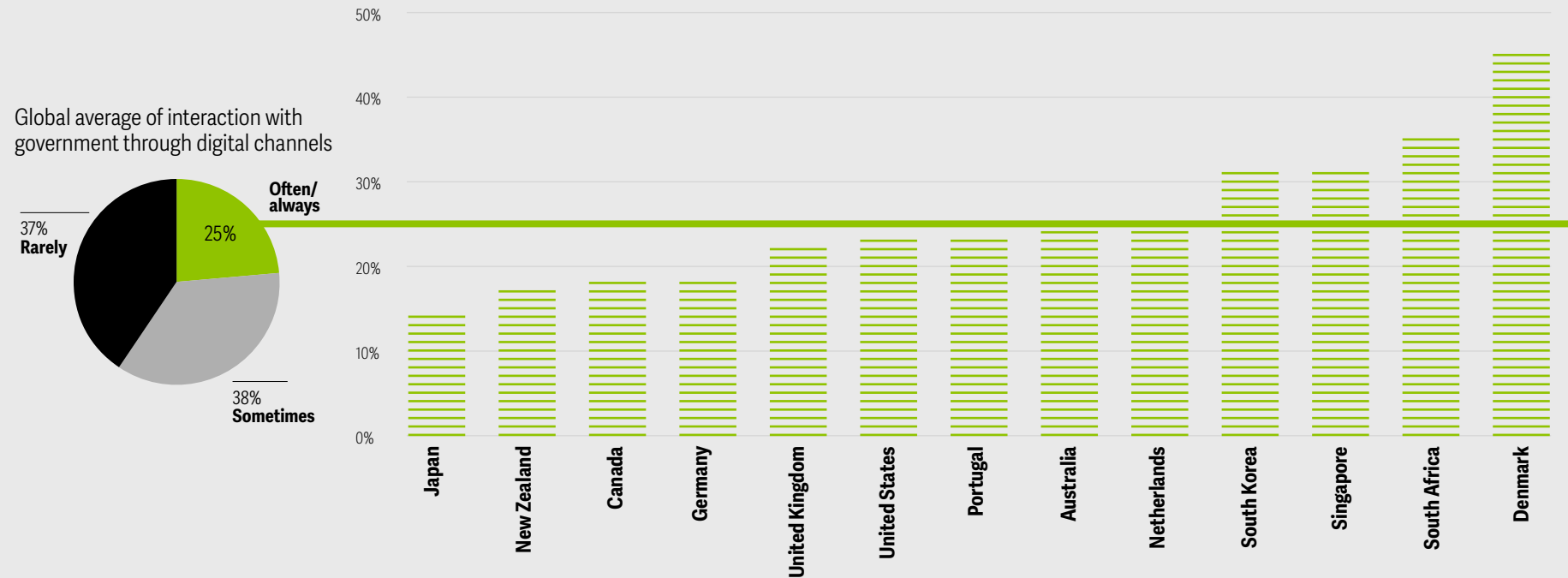


Source: 2023 Deloitte Digital Citizen Survey.

Most respondents still don't frequently access government through digital channels

Few users access digital government services frequently. Only 25% of respondents often and always interact with government through digital channels. This leaves governments with a long journey ahead, especially for countries with low usage rates.

Percentage of respondents who often and always interact with government through digital channels



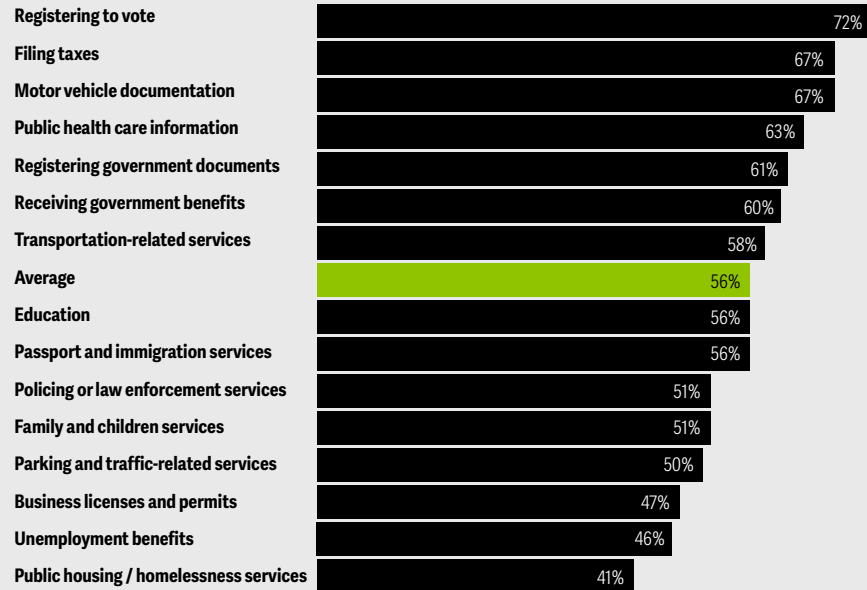
Source: 2023 Deloitte Digital Citizen Survey.

Satisfaction with digital government services on average lags the private sector by more than 20%

Nearly all online government services covered in the survey have satisfaction levels below the private sector services that were mentioned. A life-event approach to delivering some of these services could improve satisfaction.

Satisfaction level of respondents with online government services and online private sector services

Online government services (satisfied and very satisfied)



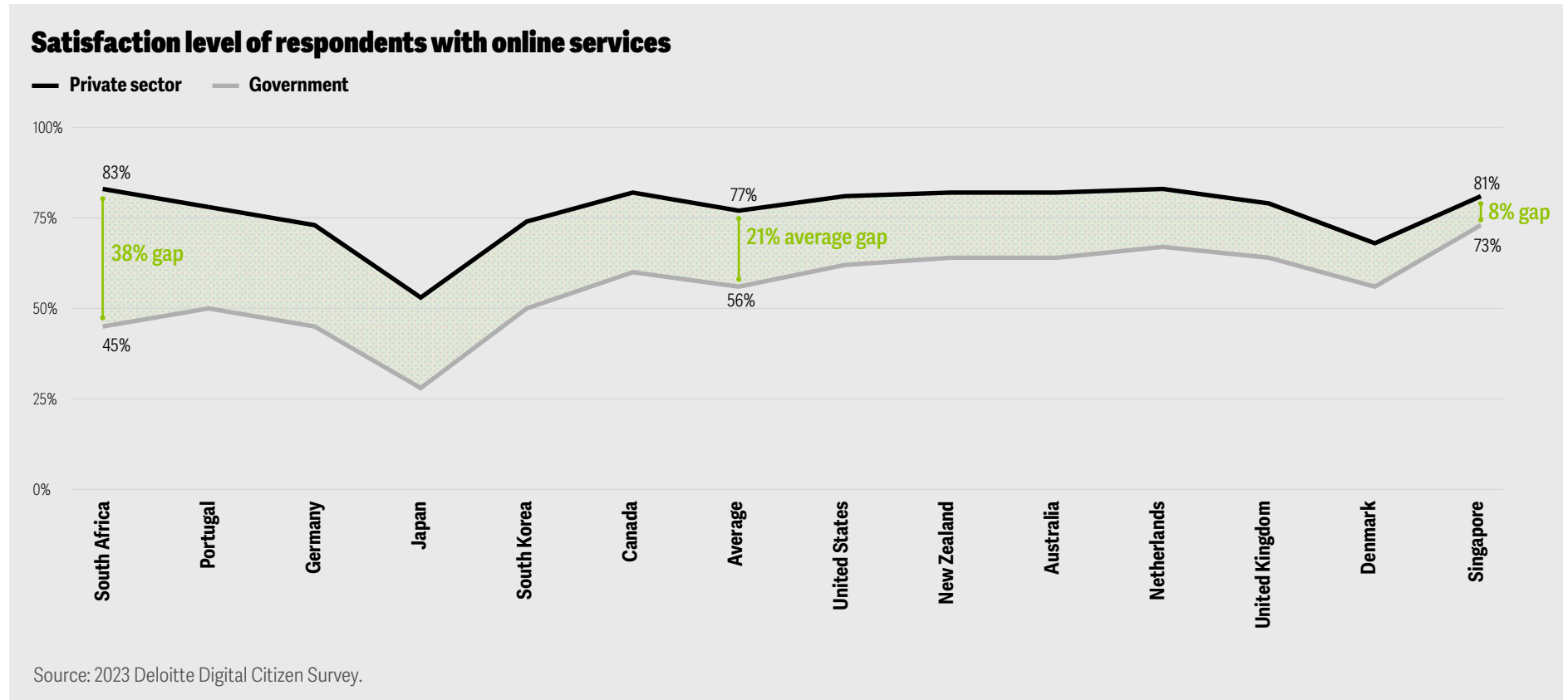
Online private sector (satisfied and very satisfied)



Source: 2023 Deloitte Digital Citizen Survey.

The public/private satisfaction gap for government services ranges from 38% in South Africa to 8% in Singapore

Satisfaction with government services in Singapore is relatively high. Singapore's Life SG app assembles a wide variety of government programs through a single interface. Citizens can search for programs and apply for more than 70 services on the Life SG app.^a

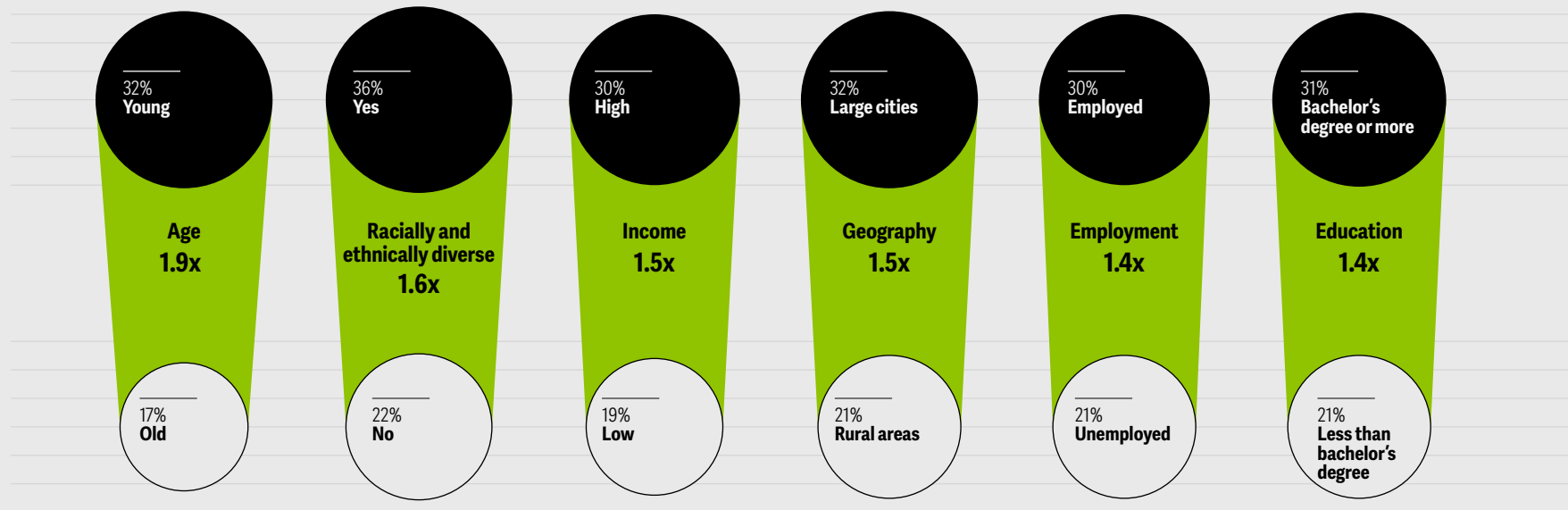


^aWilliam D. Eggers et. al., *How government can deliver streamlined life event experiences*, Deloitte Insights, July 12, 2022.

Use of digital government services varies significantly across demographic groups surveyed

While the shift toward online services during COVID-19 made things easy for many, for some it made things more difficult. COVID-19 highlighted the digital divide and how unprepared some governments were to bridge it.

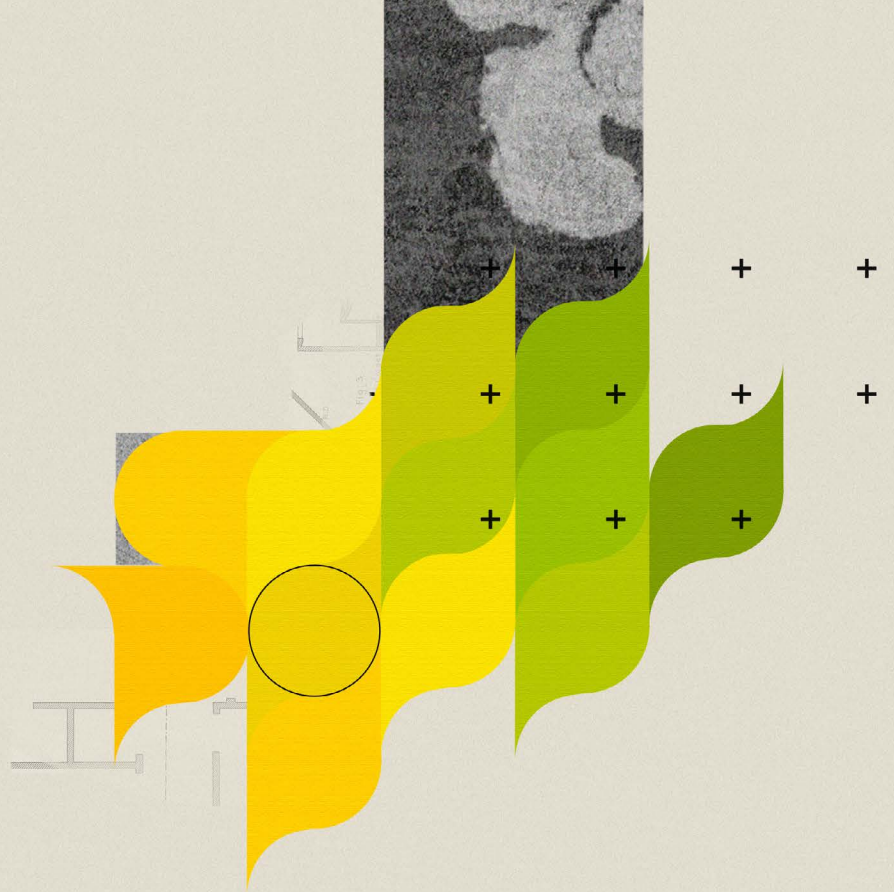
Respondents who often and always interact with government through digital channels



Notes: Age ranging from 18–34 denote younger population; 55 and above denote older population. Income brackets varied from different countries. Top three deciles were categorized as high-income earners, bottom three deciles were categorized as low-income earners, and the rest were categorized as medium-income earners.

Source: 2023 Deloitte Digital Citizen Survey.

**People are open to emerging
technology but face challenges
using existing digital services**

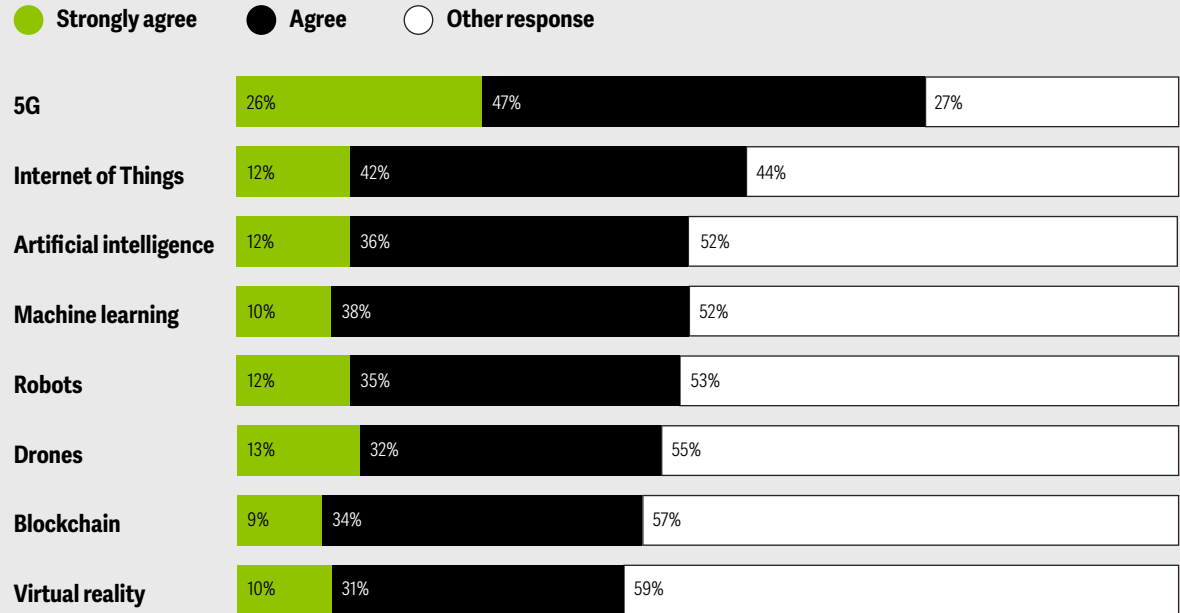


Survey respondents are largely favorable toward 5G and IoT so long as they can save time or increase convenience

Highlighting the increased demand for high-speed connectivity, 5G technology is far and away the leading technology that respondents wanted government to adopt.

I would be happy if government agencies adopted this emerging technology if it provided convenience, saved time, or provided more personalized services

Percentage of agree and strongly agree

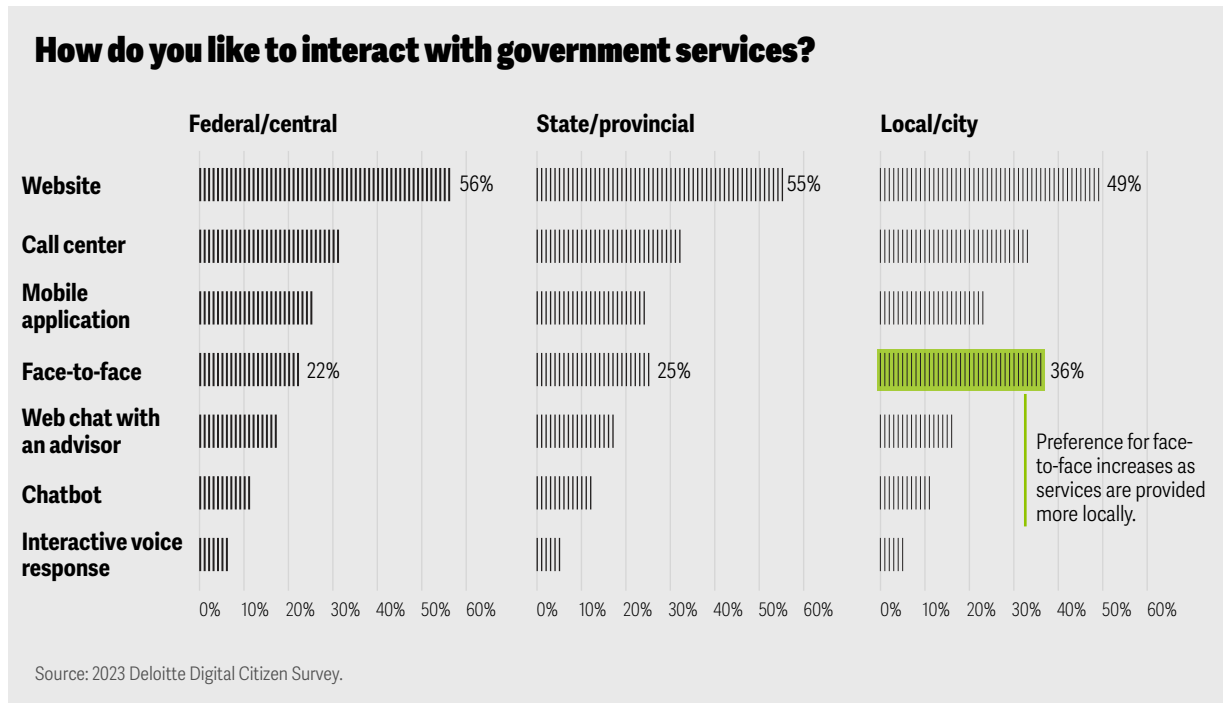


Note: Percentages may not add up to 100 due to rounding off.

Source: 2023 Deloitte Digital Citizen Survey.

Survey respondents have a clear preference for interacting with government through websites

Governments should design better websites with a focus on usability, given the strong preference for digital services. Preference for face-to-face interactions increases the closer governments are to constituents.



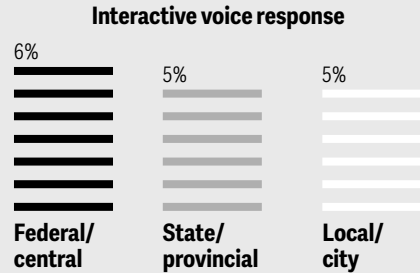
Only 6% of respondents like to interact through interactive voice response—this may be due to an outdated approach

The lack of usage of interactive voice response (IVR) could be due to the perception that IVR is slow and ineffective. Affective elements—including more and better communication and more empathetic and responsive language—can significantly help adoption of IVR, and are being implemented by many governments

Read more about how governments can modernize IVR in contact centers in our study on [the future of government contact centers](#).

How do you like to interact with government services?

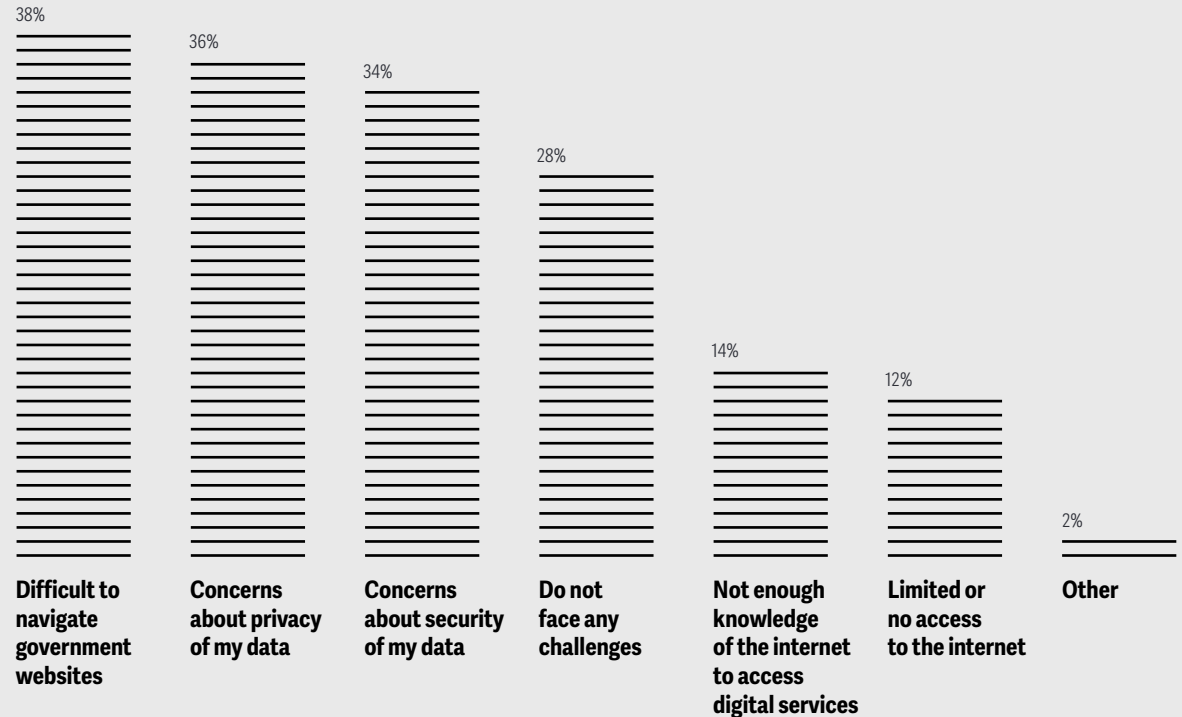
IVR is the **least-preferred** channel to access government services across age, income, race, and gender.



Source: 2023 Deloitte Digital Citizen Survey.

Users' biggest challenges— website user experience, privacy, and security—are solvable

Challenges for respondents while accessing digital government services



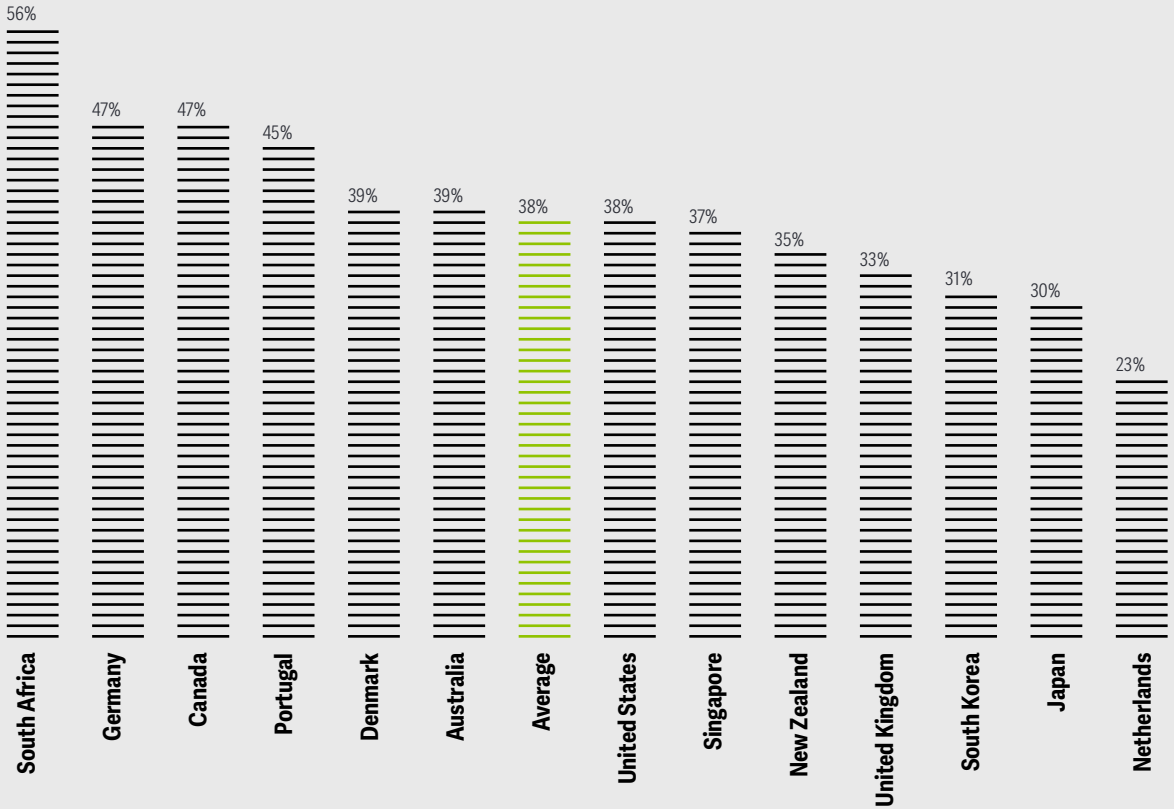
Source: 2023 Deloitte Digital Citizen Survey.

Focus on improving customer experience (CX) to increase digital adoption

Website user experiences of respondents varies considerably across countries. More than half of the respondents in South Africa identified it as a challenge. Often websites are designed from the government perspective rather than that of the users. A key to simplifying the complexity of government websites and increasing usability is focusing on user needs rather than government stakeholders.

Read more about how to improve CX in the [current state of CX in government](#).

Navigating government websites is a big challenge for respondents

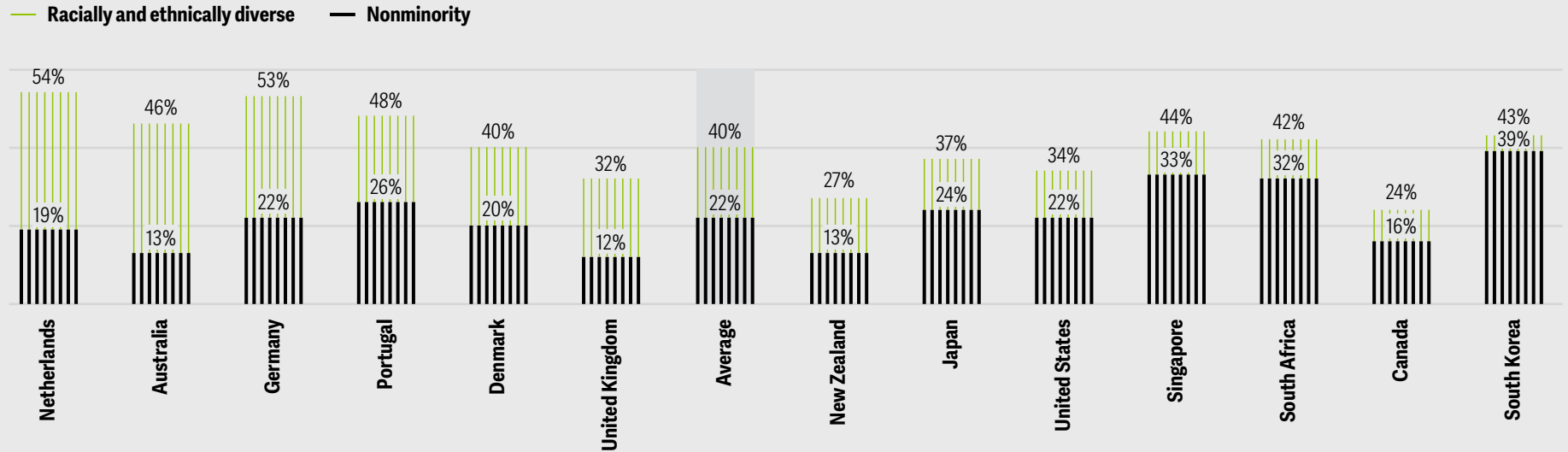


Source: 2023 Deloitte Digital Citizen Survey.

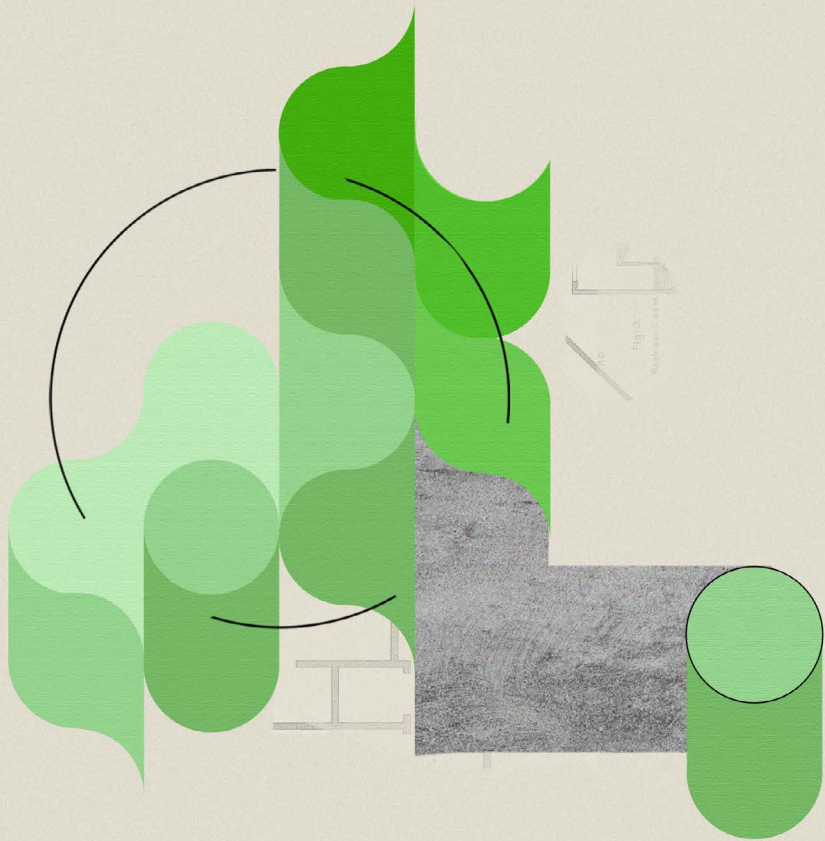
A wide gap exists between racial and ethnic groups when it comes to internet access or knowing how to access government services over the internet

Forty percent of respondents who identify as racial or ethnic minorities either do not have access to the internet or don't have enough knowledge of the internet to access digital services online. The number is substantially lower for nonminorities, at 22%. The Netherlands has the widest gap (35%) and South Korea (4%) has the shortest gap between minorities and nonminorities when it comes to accessing the internet and knowing how to use it for accessing digital government services.

Percentage of respondents citing "lack of access to internet" or "lack of knowledge of internet" as a challenge to access digital services online



Source: 2023 Deloitte Digital Citizen Survey.

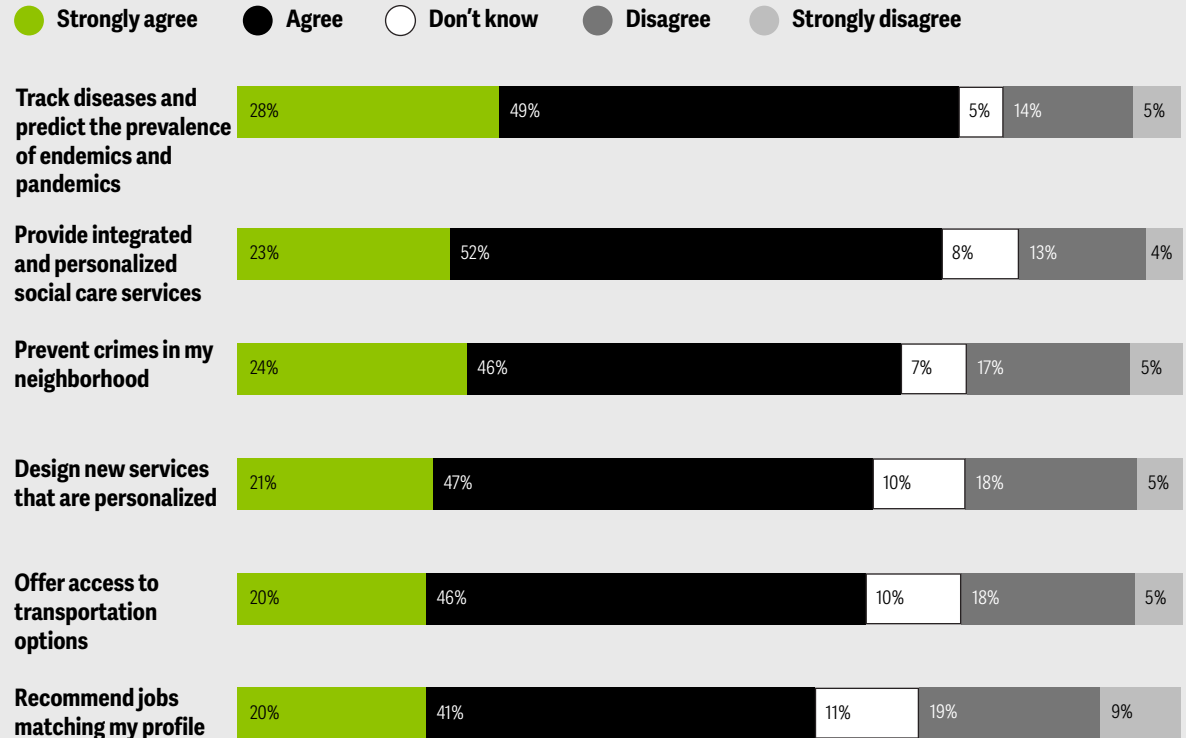


Perception is a challenge—many respondents don't see enough benefit from digital services

Respondents are generally willing to share data for personal and public benefit

Respondents are willing to share data in exchange for personalized services tailored to the individual's needs, interests, and circumstances. Sixty-five percent of people who cited privacy as a challenge are willing to share data if they know how data-sharing can improve the services they use. Similarly, 64% of those surveyed who have security concerns would also share data if data-sharing improves the services they use.

I am comfortable with government agencies collecting personal data to ...



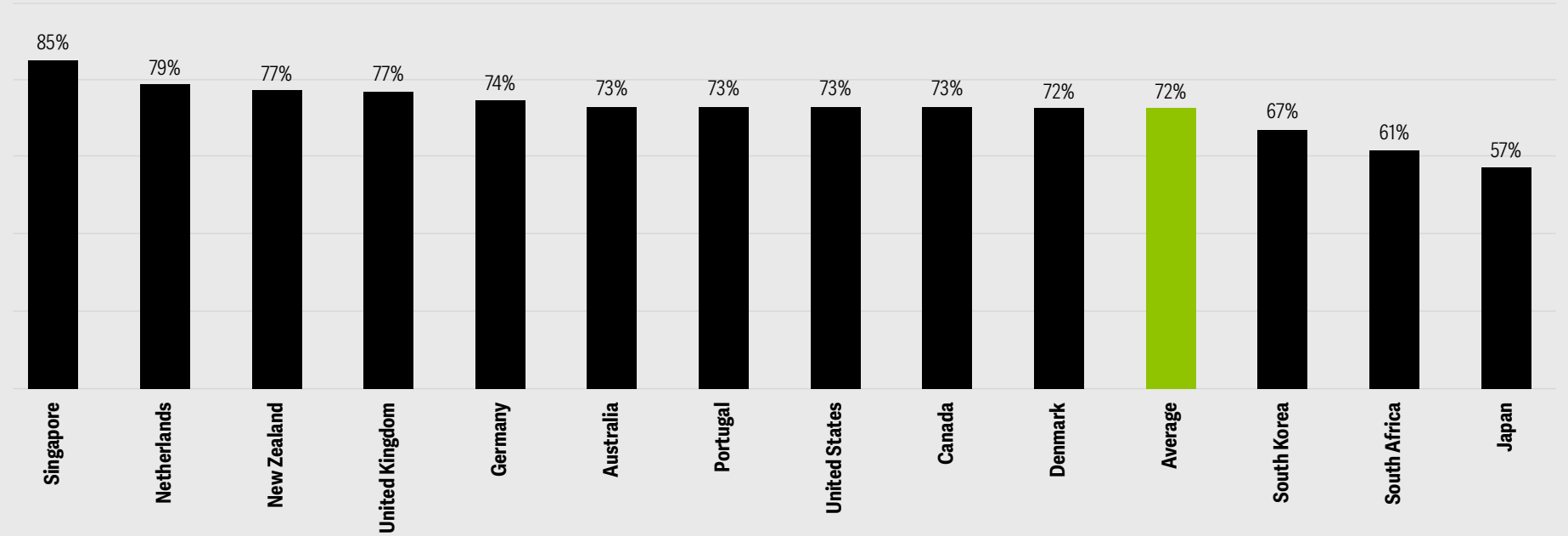
Note: Percentages may not add up to 100 due to rounding off.

Source: 2023 Deloitte Digital Citizen Survey.

Most respondents trust government to protect their personal data. Singapore and the Netherlands lead the pack.

Trust in government to protect their data

Agree and strongly agree

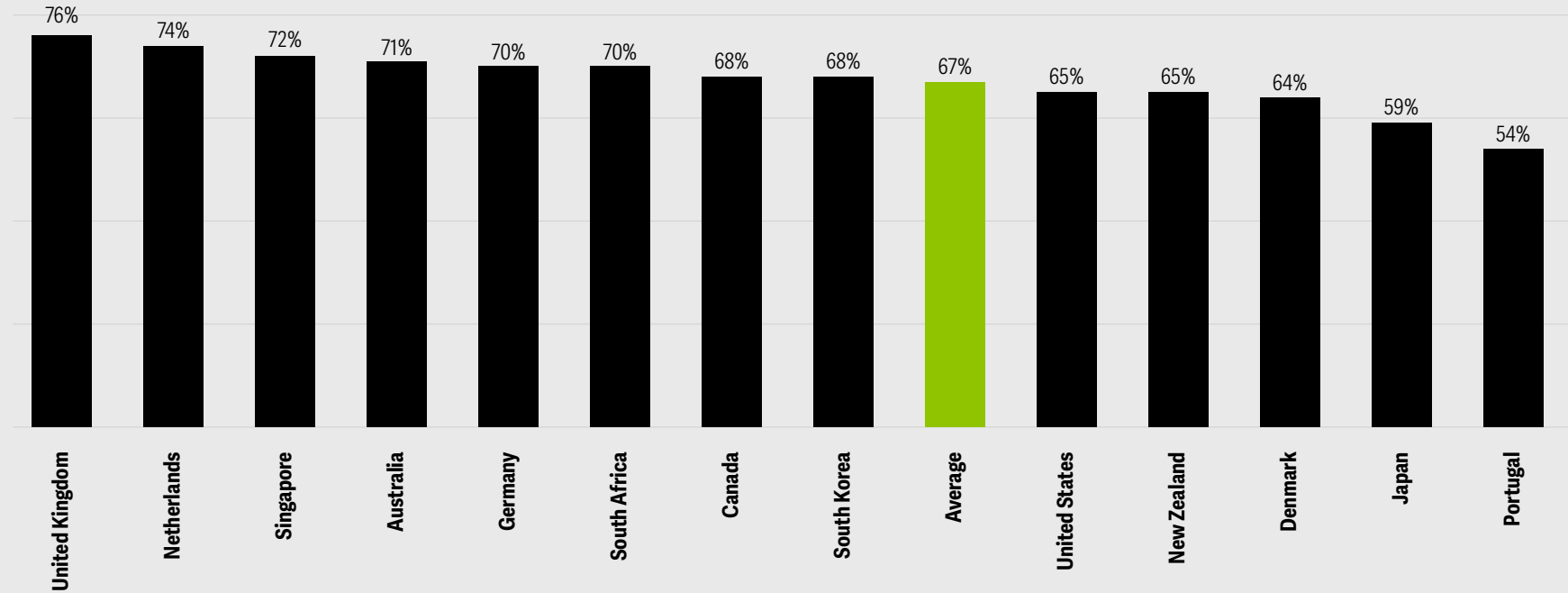


Source: 2023 Deloitte Digital Citizen Survey.

Most individuals surveyed are open to having a single, secured digital identity to access government services

I am open to a single, secured digital identity to access all government services for a given level of government

Agree and strongly agree

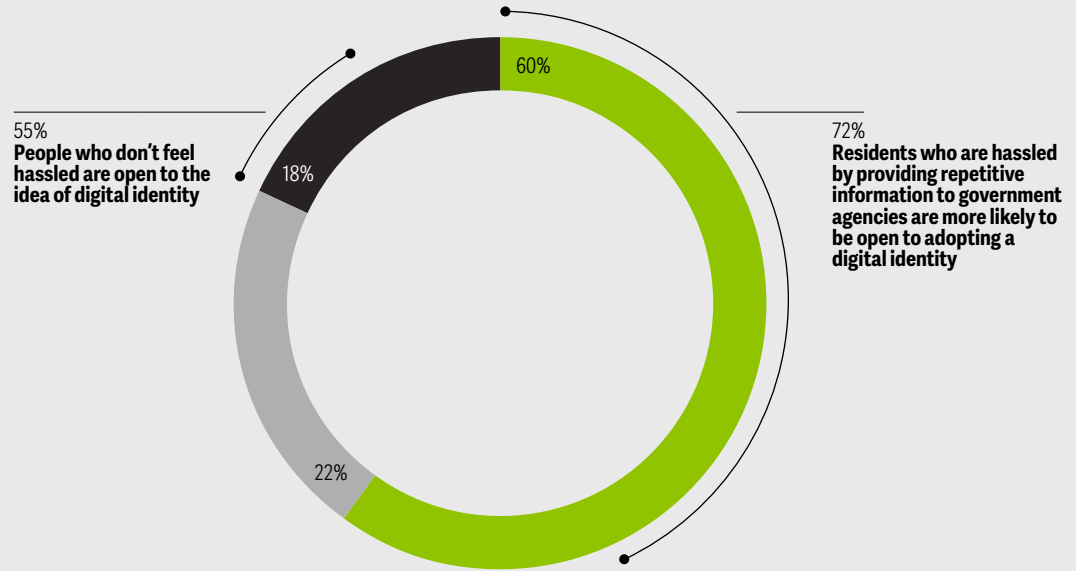


Source: 2023 Deloitte Digital Citizen Survey.

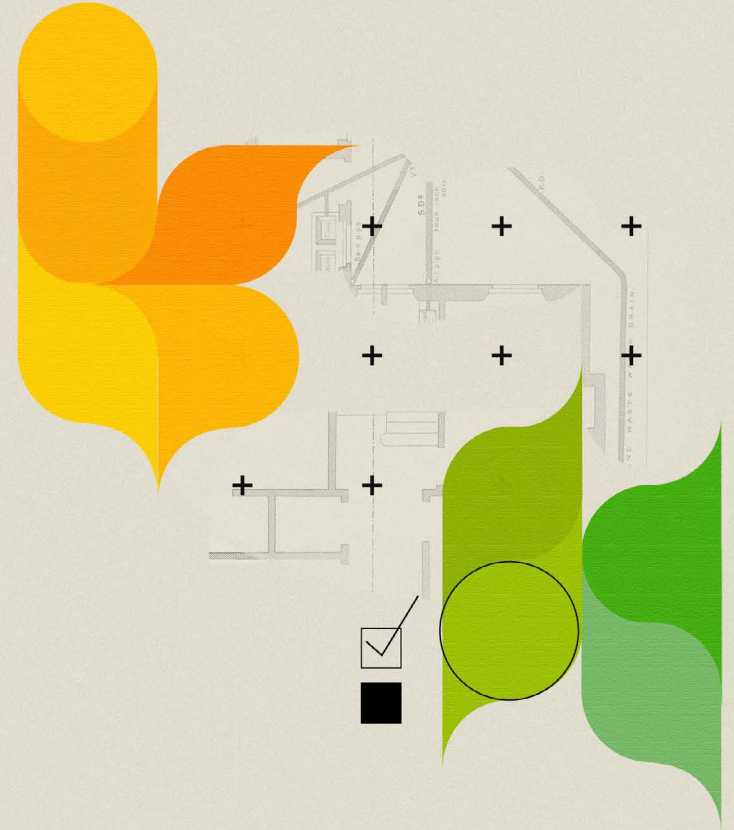
Avoiding the hassle of providing repetitive information to government agencies is a major driver behind openness to a digital identity

Government agencies asking for repetitive information is a hassle for me

● Agree ● Neutral ● Disagree



Source: 2023 Deloitte Digital Citizen Survey.



**Improving customer experience
is key to building trust**

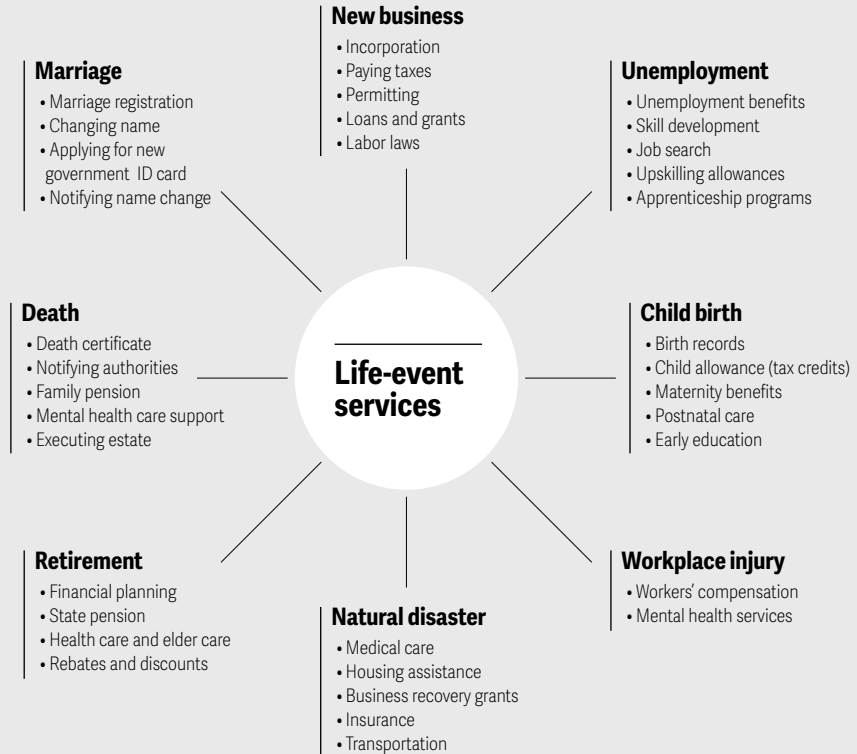
Moving toward an integrated life-events approach is an important way to improve customer experience

Life event–based service delivery focuses on the individual citizen or business.

Instead of forcing individuals to track down different government agencies in response to a life event such as a birth or death, these agencies collaborate to meet citizen needs proactively.

This can mean anticipating user’s needs, sharing information on the citizen’s behalf, and guiding them through their likely next steps.

Basket of services based on representative life events



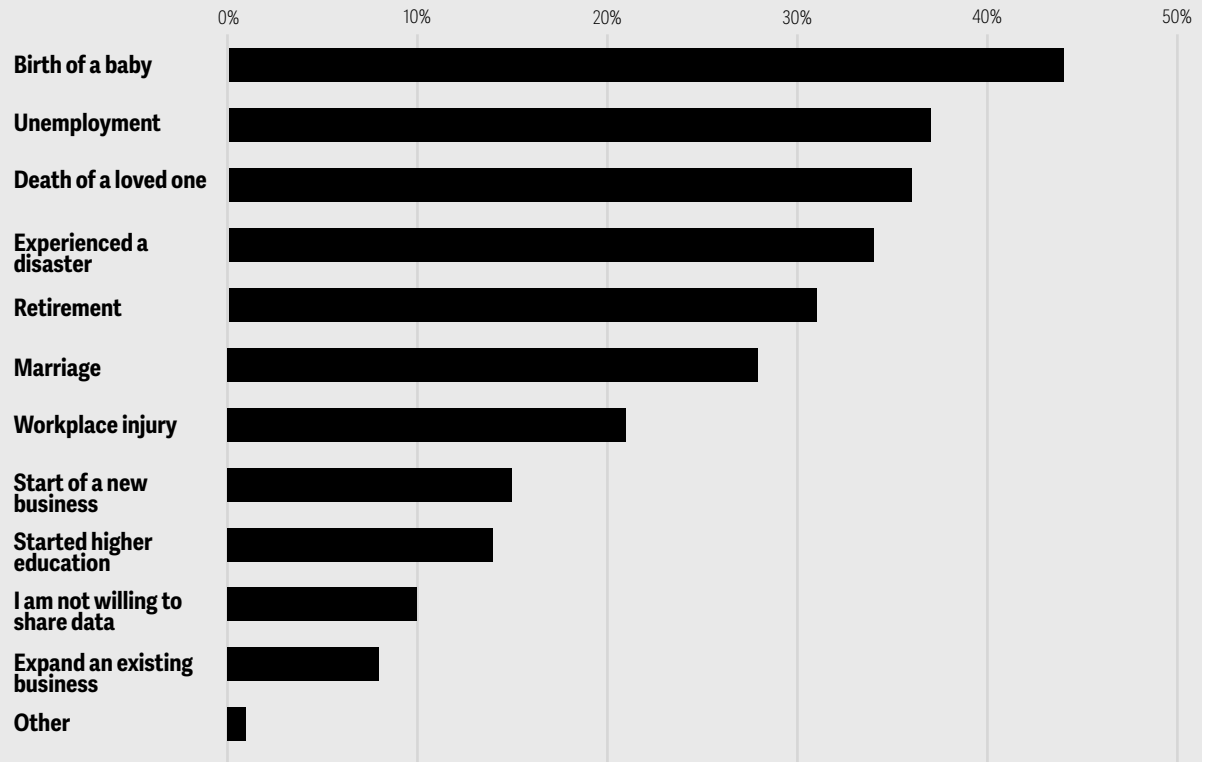
Source: William D. Eggers et. al., *How government can deliver streamlined life event experiences*, Deloitte Insights, July 12, 2022.

Individuals are willing to share life-event data for a range of government services

Instead of forcing individuals to track down different government agencies in response to a life event, such as a birth, unemployment, or death, these agencies collaborate to meet citizen needs proactively. Life-event services help governments to anticipate citizens' needs, share information on the citizen's behalf, and provide a host of integrated services.

Willingness to share data for life events–based government services

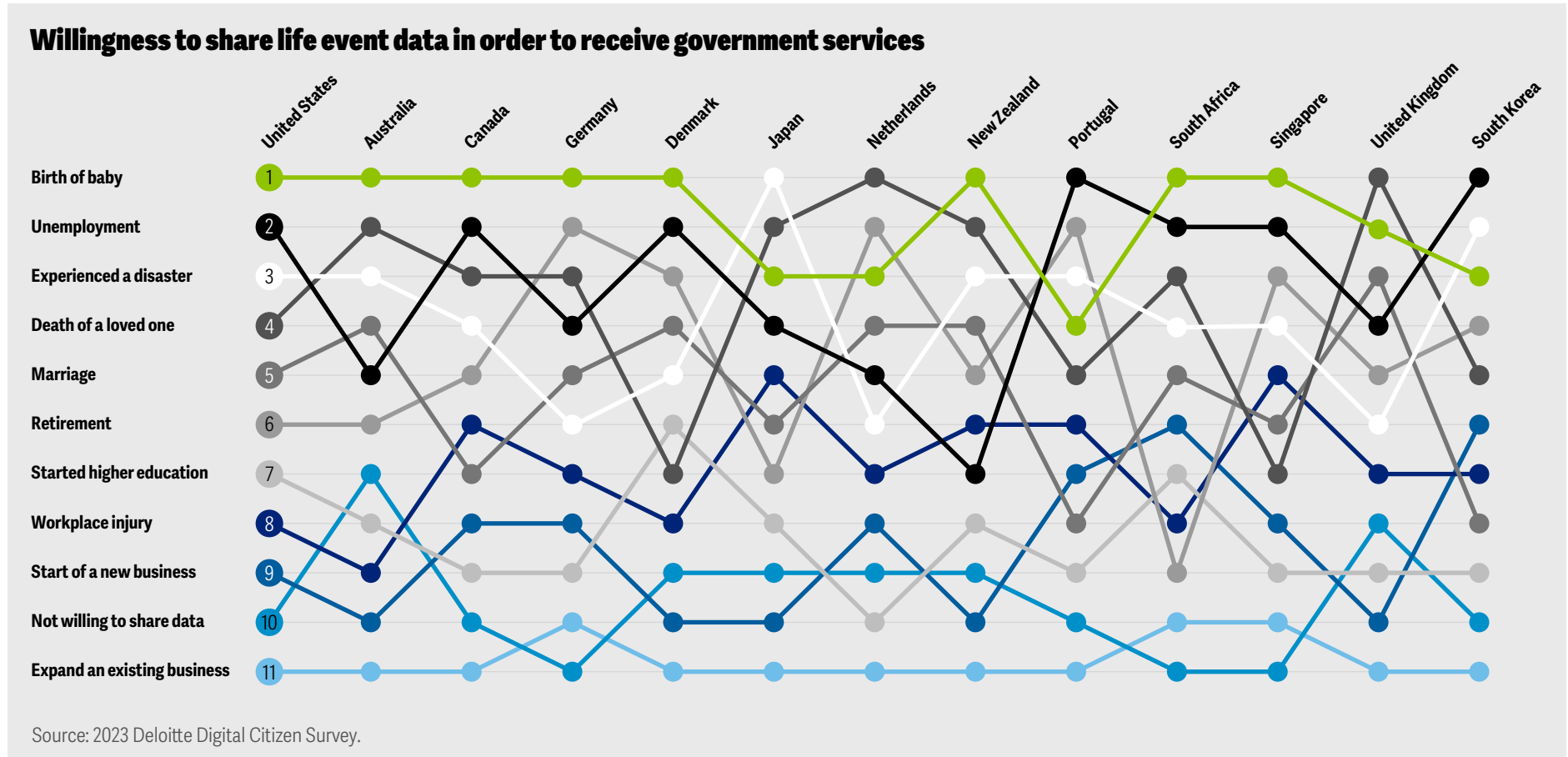
Please select the three you would be most willing to do



Source: 2023 Deloitte Digital Citizen Survey.

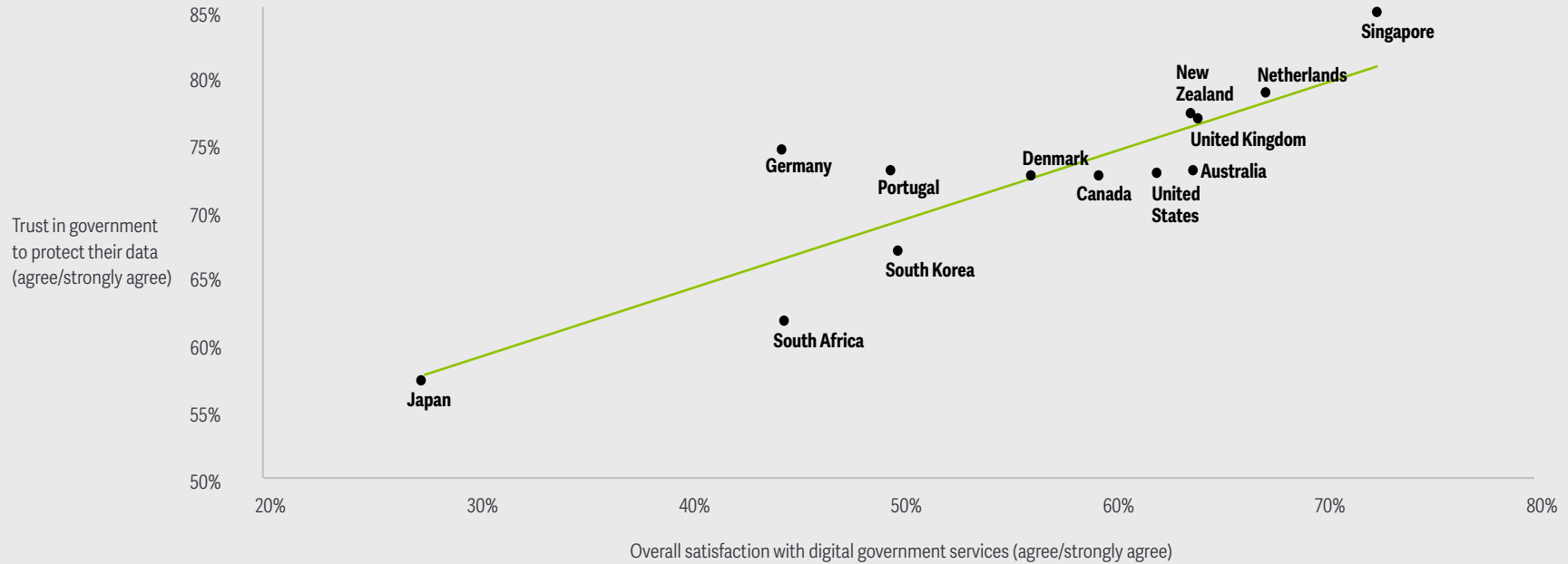
Preferences of life events across countries

Residents of eight of the 13 surveyed countries rank birth of a baby as the top life event for which they are willing to share data.



Respondents' trust in government to protect their data is strongly correlated to their satisfaction with digital government services

Association between trust and satisfaction with digital government services



Source: 2023 Deloitte Digital Citizen Survey.

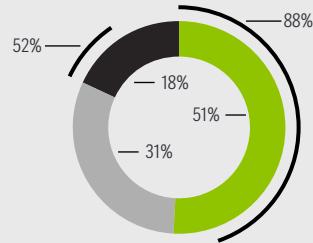
Better customer experience can lead to higher satisfaction and, thereby, higher trust in government

Respondents who are satisfied with an agency's digital services also tend to rate the agency highly trustworthy in protecting their personal data. Respondents who are not satisfied with digital services tend to generate lower trust scores. This implies that better CX could improve satisfaction and thereby increase trust.

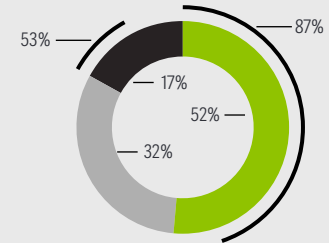
Customer experience in government

● Satisfied ● Neutral ● Not satisfied — High trust in protecting personal data

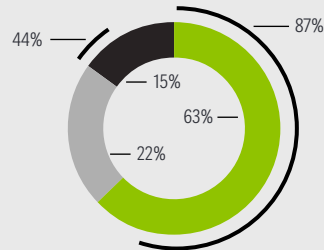
Law enforcement departments



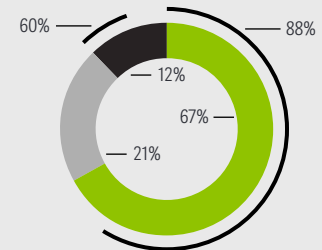
Online family and children services



Health services



Filing taxes



Source: 2023 Deloitte Digital Citizen Survey.

By focusing on customer experience, governments can improve satisfaction with government services

Agencies can help to improve CX by shifting to a citizen-centric mindset, tie CX to a mission outcome, assign ownership of improving CX, and build the necessary infrastructure to deliver it.

Shift from government-centric to citizen-centric. Tailor government services around citizen needs, not government.

Assign a leader who owns all the touchpoints across the customer journey. Agencies should establish a CX office that coordinates CX initiatives across an agency.

Build infrastructure to deliver CX. Use integrated data management to adopt once-only principles to collect data and deploy artificial intelligence and machine learning to personalize service delivery.

Tie CX to a particular mission outcome. Better understanding of citizen needs and behavior can allow government agencies to serve constituents more effectively and do so in a more cost-efficient way.

Find new service delivery models. Focus on user-centricity to identify transformational ways of delivering services that can cut costs and build trust.

Read more about contact centers in [Government customer experience could hold the key to citizens' trust.](#)



Recommendations

Tailor services to constituents

Customer segmentation, proactive service delivery, and personalization can help governments deliver highly tailored services when “one size fits all” approaches don’t serve well or are not equitable.

Focus on user experience to help restore trust

Our results showed a clear link between satisfaction with online services and trust in government. Keeping the end-to-end user experience in mind can help agencies design services that are easy to use and deliver positive results.

Prioritize privacy and data security

Data security and privacy are constantly evolving areas with changing expectations at the constituent level. These areas can be key to building trust. Establishing transparent processes and providing a clear summary of how data is used are good places to start.

Be transparent and share performance data

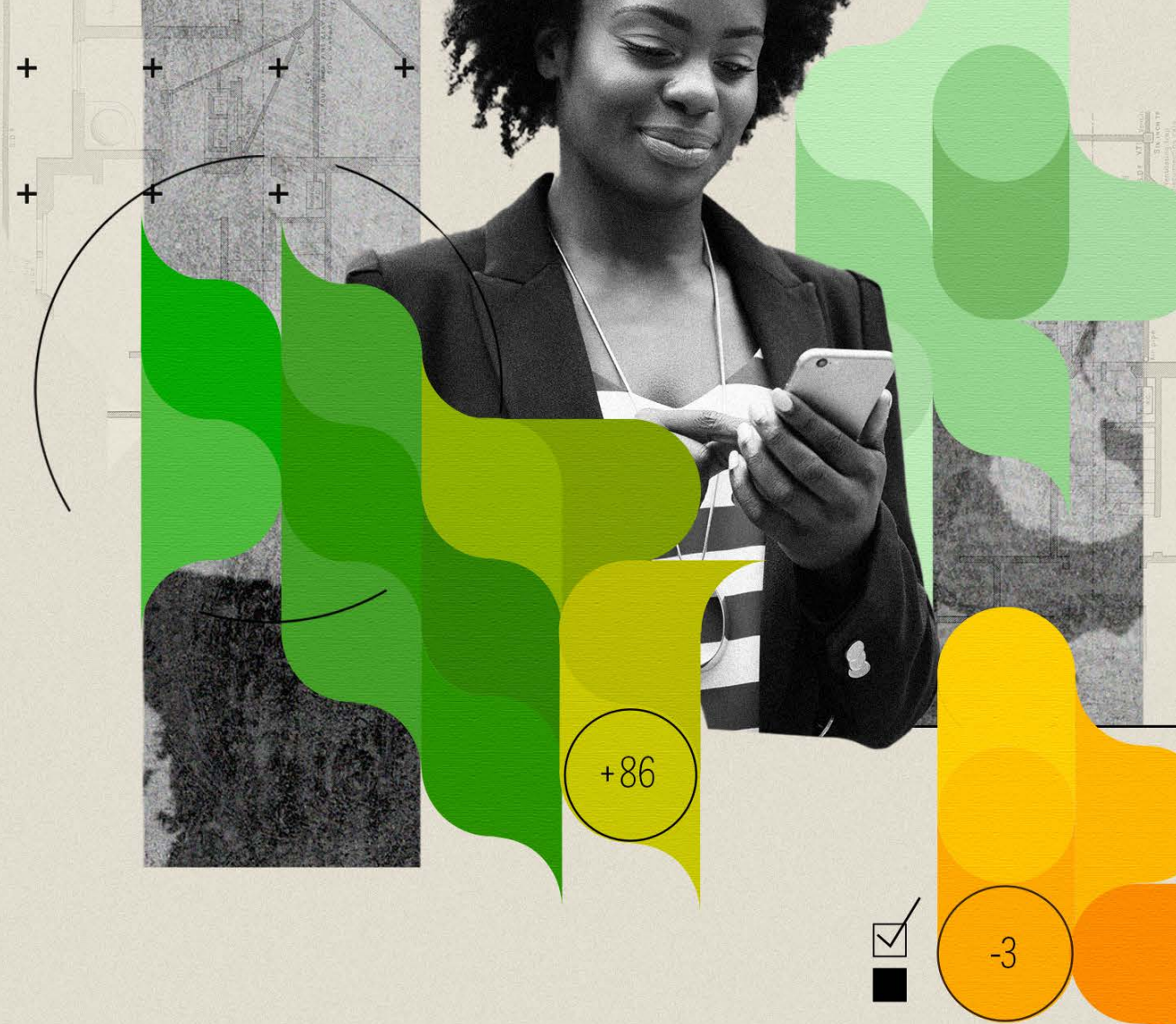
Government agencies sometimes miss the opportunity to share good news about what they have accomplished. The shortcomings of government services tend to be highlighted, while success

stories are often overlooked. Government agencies that transparently share their own results—good and bad—can help combat this bias.

Adopt a life-event approach

Put the user at the heart of government services rather than organizing by agency function. This requires extensive user research through design tools such as ethnographic study, journey mapping, and persona development to understand individuals’ needs.

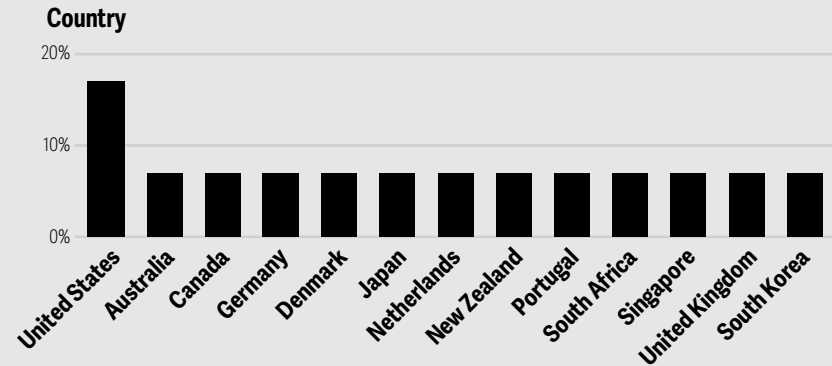
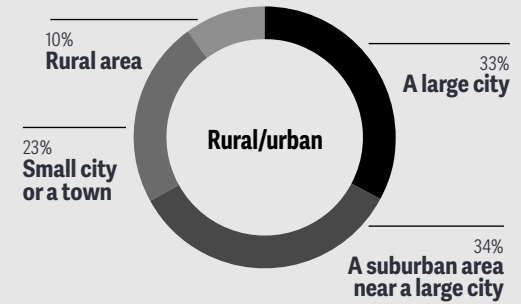
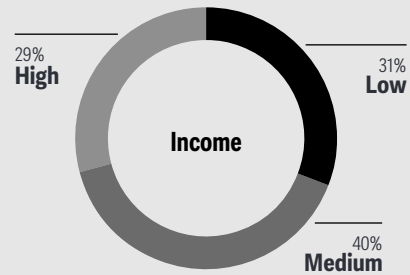
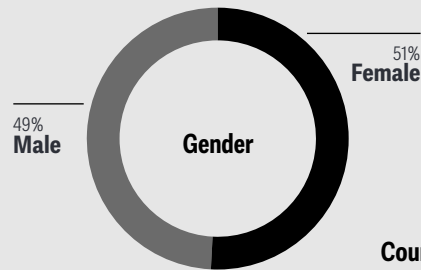
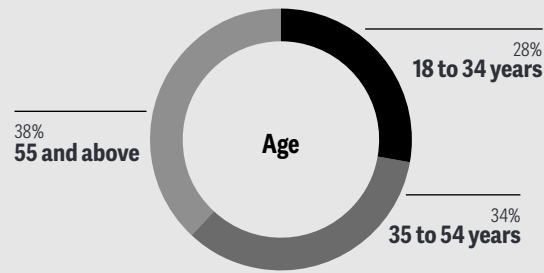
Methodology



Deloitte Digital citizen survey: Global Sample

In Nov–Dec 2022, Deloitte surveyed 5,800 individuals to understand their use of government digital services in 13 countries. The survey results are weighted for age, income, and gender.

Key demographic distribution of survey respondents



Source: 2023 Deloitte Digital Citizen Survey.

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