Delivering experiences that count

Global survey results and insights on digital citizen services
Executive summary

- Adobe and the WPP’s Government & Public Sector Practice conducted research with more than 7,000 citizens in seven countries to understand what drives a positive experience of online public services

- The research suggests that, unsurprisingly, citizens expect online public services to be highly functional, efficient and well-designed. More fundamentally however, they also want a positive citizen experience that comes from services tailored to their needs, and which promote a closer State-citizen relationship or dialog

- The majority of respondents believe that they currently receive variable levels of service from government online services and this leads to a loss of trust in the ability of governments to meet their needs

- Participants in this research believe that government online services - across all seven countries – are at best ‘adequate’ at fully meeting the needs of citizens

- At a time when trust in government is at an all-time low across many countries – and when spending on digital services is high – it is critical that governments look beyond functional efficiency and focus on the areas of online services that matter most to citizens in order to build trust, improve efficiencies, reduce costs, and ensure that the benefits of government services are more easily accessed.
Executive summary

What could you do with an extra £1.7 billion?

Provide free school meals for all school children? Build 20 new hospitals? The UK government saved this exact amount in a single year by transforming its approach to digital public services and technology1.

Digital public services can provide significant cost efficiencies and improve a wide range of outcomes for service users across the public sector, provided they meet the evolving needs and expectations of citizens. But these needs and expectations are not always understood by government departments and agencies. To deliver the best possible digital experience, governments need to look beyond just functionality and focus more on understanding the citizens’ needs to provide tailored, personalized online experiences.

Listening to citizens about experience

To understand what drives citizen needs and influences their online experiences of government digital services, Adobe and WPP’s Government & Public Sector Practice pooled their knowledge and expertise to conduct this research. The research captured the attitudes and experiences of digital public services of more than 7,000 citizens in seven countries where Adobe is working with public sector organizations. A series of thorough qualitative and quantitative research was supplemented by social media analysis.

What do citizens want from online government services?

The research indicates that a good experience of online public services is the sum of a holistic set of five dimensions:

1. CITIZEN JOURNEY
The start of the citizen journey is the point at which the citizen is ready to engage with the government online and ends when their needs have been fulfilled.

2. MOBILE
Relates to the use of smartphones and tablets, and whether a particular service is optimized and responsive on and across these devices. This is critical for service accessibility, particularly in countries where fixed line internet is not widely available.

3. DESIGN
Assesses the way in which the combined elements of graphics, visuals and content impact the successful use of a service.

4. RELEVANCE
The extent to which an online experience is tailored to the user, either at the individual or group level. Personalization enables services to be relevant to the end user.

5. RELATIONSHIP
Refers to how the experience of using a service affects the relationship between the citizen and the government, and the way in which new technology can help citizens move from passive consumers to co-creators of ever more relevant services.

Taken together, high performance across these dimensions captures the seamless, tailored and fulfilling experience that citizens increasingly expect from and demand of both private and public sector online services. An analysis of the five dimensions provides important new insights into the current state of digital public services globally.

The research suggests governments are performing better on the delivery of the more functional components of experience – Citizen Journey and Mobile. These components are more broadly associated with infrastructure, IT, and the basic foundations of digital delivery.

By contrast, the research also suggests governments are not yet meeting citizen expectations in the more advanced and emotive components of experience – Relationship and Relevance. When delivered well, these components help build the strongest and most meaningful connections between government services and citizens, because they demonstrate to the user that their needs, preferences and views have been considered.

Relationship and Relevance are not dimensions traditionally prioritized by governments when attempting digital transformation. Therefore, a key finding of our research is that these areas must be prioritized if governments are to provide services that are future-proof and aligned with what citizens increasingly expect and need.
Executive summary

The research found the same pattern in all seven countries surveyed: citizens consistently rated the Citizen Journey and Mobile dimensions of the online public services they use more highly than the Relationship and Relevance dimensions. While this suggest governments routinely under-index on emotive dimensions, there are some clear cultural and contextual reasons:

• A large emerging nation had very positive scores across all dimensions, indicating that its online service provision is in-line with current – albeit limited – citizen expectations. However, technology is rapidly becoming a central part of citizens’ lives and as a result they are expectant of further developments in functionality and efficiency, as well as a closer relationship with government.

• A highly-centralized nation was judged by its citizens to provide online services that are easy to access, efficient and available on multiple platforms. However, its citizens are increasingly tech savvy and highly demanding: they expect their government’s online services to be more attractive and adaptive experiences than they currently are.

• A large federalized state was found to deliver well on functional and ease aspects, with citizen needs focused on the design and relationship aspects. However, its citizens expected online services to delight and be enjoyable. Here too, their overall expectations of government services were not being met.

• Citizens in a smaller federal state with high levels of technological literacy indicated they rarely chose to interact with their government online. This suggests a lack of overall trust in the Federal government that could, in part, be overcome by developing the aesthetics and adaptiveness of content, by emphasizing performance, and by pushing features to the next level of usability across all channels and devices.

• Government services in a developed state had relatively low uptake and are currently serving a very functional role in efficiency and decision-making. The country’s citizens are keen to see services develop across the full spectrum of design aspects, from functionality to attractivity.
Why governments should read this research

While many governments have already taken steps on the long journey of total digital transformation, significant room remains for improvement. The research tells us that the factors which will lead to improvement from the citizen perspective are those which recognize and value citizens as individuals, with their own preferences, needs and desires.

From the government perspective, providing an enhanced online experience which focuses on relevance and relationship can produce invaluable outcomes by:

- **Increasing the uptake of online government services**, driving greater efficiency and benefits for citizens and governments.
- **Supporting citizens to complete transactions more accurately**, reducing errors and avoiding more costly contact.
- **Reducing the need for offline support**, driving greater efficiency and refocusing face-to-face contact on those most in need of additional support.
- **Increasing optimization**, allowing governments to measure and continually adapt services to citizen needs.
- **Meeting and exceeding expectations**, positioning governments as competent to deliver services in the 21st century.
- **Engaging citizens**, providing a widely available interface for dialog and building of trust between the citizen and state.

The alternative scenario is one where governments continue to invest in developing online public services using a "one-size-fits-all" approach – services which most citizens cannot, will not or do not want to use. Services which homogenize individuals reinforce the divide between the State and the citizen.

This research identifies a key opportunity for governments: by focusing on what drives satisfaction – effective design, tailored experiences, and support for a dialog and relationship – governments can transform the effectiveness of their public services. The research offers a guide for action which can help governments move towards the next stage of their own digital transformation, a stage characterized by citizen-centricity and the development of meaningful relationships.
Introduction

Government digital transformation: great expectations, huge opportunities
In recent years, there has been a seismic shift in how public services are delivered, with more and more services moving online. Digital has fast become the new normal and it is inconceivable that government strategies for future service delivery would not have digital services as the front door for the vast majority of queries and transactions.

The potential efficiencies achievable through online services are hard to ignore. A 2014 study calculated that an in-person transaction in Australia costs the government AUD$16.90 versus a mere AUD$0.40 for an online transaction. And the new UK Government GOV.UK website resulted in savings of £1.7 billion in 2014, equivalent to almost £7 billion in funds over the typical term of a parliament.

To date, delivery of digital public services has focused largely on functional issues such as online access, security, identity, and the choice between open source or closed platforms. These are important building blocks and enablers for citizens to access digital public services, however, governments now need to look beyond addressing functional requirements to provide online services that matter most to citizens to build trust, improve efficiencies, reduce costs, and ensure that the benefits of government services are more easily accessed.

Cost savings and improvements to social and policy outcomes can be derived best from public services that generate higher levels of engagement and uptake. Quite simply, better services can support a virtuous circle of prosperity and stability.

The most recent customer survey for the UK government’s tax authority, Her Majesty’s Revenue and Customs showed two-thirds of those who used HMRC’s online services had positive experiences compared with 55% who contacted the service via telephone, providing a glimpse of the potential benefits of well-executed, user-centric government services.

Secondly, consumers are increasingly used to accessing whatever they want, whenever and however they want it online. This "Amazon Syndrome" has created expectations of a digital experience that current models of government service are unable to match. The level of new technology adaptations by the public sector compared to the private sector highlights areas of opportunity to better align citizen expectations and public sector delivery.

The unique conditions of government

Is it fair to hold the public sector to the same standards as the private sector? Governments face unique challenges which set them apart, not least a moral and legal responsibility to engage with the entire population including the hardest to reach in society, and higher levels of regulation, scrutiny and public sensitivity around data sharing and security. Furthermore, the majority of governments are wrestling with unwieldy internal bureaucracy and a culture of risk and change aversion. Such challenges mean governments have difficulty embracing digital transformation with the agility sometimes displayed in the private sector. However, at a time when trust in government is at an all-time low and reconnecting with citizens is a priority, delivering a positive experience is key to reinforcing the citizen-government relationship.

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2 Deloitte, Access Economics study from Adobe, Digital Transformation in the Public Sector, 2014
3 Foreshew-Cain, 2015, UN E-Government Survey 2016
7 OECD, Trust in government, 2015
The digital journey of governments is evolving

As outlined in previous work from Adobe and WPP\(^8\), most governments are at the second of a three-stage process of digital transformation. These are:

**DEPARTMENTS.GOV**
Early sites are online noticeboards, making government more visible but not necessarily accessible. The offer is fragmented and based on internal organizational structure, not user needs. There are few online interactions or transactions.

**SERVICES.GOV**
Governments aim to provide a single-entry point to access digital services, cutting across departmental silos with a more coherent citizen-centric offer. Online interaction is increasingly provided for common or expensive transactions. Agile project management techniques, deep user research and iterative user testing are common.

**ME.GOV**
Digital journeys begin and end in the real world, moving seamlessly between government channels and search, social media, advertising, email, CRM and apps. Design is driven by deeper, broader insight into how users feel about their service experiences and how that drives outcomes. Agile iteration supported by machine learning continuously improves algorithms that underpin digital experiences.

This research suggests that the governments studied as part of this project are in stage 2, services.gov, which is characterized by the provision of single entry points and the reduction of departmental silos, where online interaction is increasingly available for high-value or high-volume transactions\(^9\). But this stage does not yet fulfill the third stage of transformation, me.gov, which envisages seamless, fulfilling and citizen-centric online services.

It is at the me.gov stage of transformation that governments truly realize cost efficiencies and improvements to social and policy outcomes, and generate a level of engagement with citizens that helps support a virtuous circle of prosperity and stability. There are some examples of governments – or rather, of specific services – making this transition, though there remain numerous opportunities for improvement.

\(^8\) WPP’s The Government & Public Sector Practice, me.gov, 2016
\(^9\) Ibid
A citizen-driven approach rather than a tech-driven approach

To date, most studies into digital government have been concerned with the enabling, or disabling, factors that surround the introduction and development of online services, such as infrastructure, security and digital inclusion. While important, this focus does not provide the necessary depth of understanding into citizen needs and behaviors to understand what will drive their use of online public services. To gain insight, we conducted new research into the citizens’ point of view, gaining their perspective on the services they currently use and what would improve their experience. Getting a better view of citizen and digital needs can enable governments to take steps towards a forward-facing digital government that puts the citizen at the heart of its services.
Introduction

Based on our work with governments around the globe, Adobe and WPP’s Government & Public Sector Practice understand that functionality must be accompanied by a positive experience which may be viewed as a key strategic tool in ensuring the uptake and effective use of online public services, supporting cost efficiencies and relationship building.

Our combined work and research in this area has led us to conclude that good experience is the sum of a holistic set of five dimensions, each of which contribute to the question: how did this online experience make the citizen feel? And, in turn, how will this impact their relationship with and their perception of the organization delivering the service?

Taken together, high performance across these dimensions captures the seamless, tailored and fulfilling experience that represents today’s digital best practice. They are:

1. Citizen Journey
   The start of the citizen journey is the point at which the citizen is ready to engage with the government and ends with the when their needs have been fulfilled.

2. Mobile
   Relates to the use of smartphones and tablets, and whether a particular service is optimized and responsive on and across these devices. This is critical for service accessibility, particularly in countries where fixed line internet is not widely available.

3. Design
   Assesses the way in which the combined elements of graphics, visuals and content impact the successful use of a service.

4. Relevance
   The extent to which an online experience is tailored to the user, either at the individual or group level. Personalization enables services to be relevant to the end user.

5. Relationship
   Refers to how the experience of using a service affects the relationship between the citizen and the organization, and the way in which new technology can help citizens move from passive consumers to co-creators of ever more relevant services.

Delivering an effective citizen experience of public services relies on all these dimensions.

Adobe commissioned Kantar Public10, WPP’s government and public sector consultancy and research practice, to conduct research based on these five dimensions to look beyond functionality (what citizens can do online), to focus on the transformative experiential improvements which are both possible and necessary. This research therefore aims to provide a rigorous understanding of how to improve experience, based on evidence gathered from citizens, to offer an actionable guide to shaping digital strategy.

10 www.kantarpublic.com
Understanding what drives citizen experience

Kantar Public developed a multi-strand approach to provide Adobe and WPP’s Government & Public Sector Practice with a holistic understanding of perceptions of public services. Working closely with a cross-section of service users, the research was designed to capture citizen attitudes and experiences.

The research was conducted in seven democratic countries where Adobe has experience of working with public sector organizations on digital transformation. These countries are at different stages of digital transformation and therefore cover a range of citizen expectations concerning digital services.

<table>
<thead>
<tr>
<th>Country</th>
<th>Style of government</th>
<th>Internet Use</th>
<th>Mobile Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Federal parliamentary republic</td>
<td>Very High</td>
<td>Very High</td>
</tr>
<tr>
<td>B</td>
<td>Parliamentary constitutional monarchy</td>
<td>Very High</td>
<td>High</td>
</tr>
<tr>
<td>C</td>
<td>Constitutional federal republic</td>
<td>Very High</td>
<td>Very High</td>
</tr>
<tr>
<td>D</td>
<td>Federal parliamentary republic under a constitutional monarchy</td>
<td>Above Average</td>
<td>Moderate</td>
</tr>
<tr>
<td>E</td>
<td>Parliamentary democracy under a constitutional monarchy</td>
<td>Above Average</td>
<td>Average</td>
</tr>
<tr>
<td>F</td>
<td>Federal parliamentary republic</td>
<td>Very High</td>
<td>High</td>
</tr>
<tr>
<td>G</td>
<td>Parliamentary constitutional monarchy</td>
<td>Very High</td>
<td>Very High</td>
</tr>
</tbody>
</table>

Source: CIA The World Factbook 2017

The multi-strand approach included desk research (reviewing literature on citizens’ views and experiences of online public services), an online quantitative survey with 7000+ participants (1000+ participants per country), qualitative surfing sessions with service users, and social media analysis.

This research is not intended to compare or rank countries against each other. Rather, the study offers insight into how citizens benchmark their digital experience across the five dimensions in their country to show where governments are performing well and less well, relevant to their citizens’ expectations.

11 For more detail on the methodology please see the Appendix.
A global story: adequate, but not future-proof

At the global level, analysis of the five dimensions provides a clear illustration of the digital journey so far. Overall, citizens demonstrated a faintly positive attitude towards digital government services. While this confirms that governments have already taken steps on the digital journey, citizens still believe there is significant room for improvement.

Comparison of performance across the dimensions tells a very clear story. Governments are performing best on the more functional components of experience: Citizen Journey and Mobile. These are dimensions more broadly associated with infrastructure, IT, and the basic foundations of digital delivery.

By contrast, governments are performing less well on some of the more advanced and emotive components of experience: Relationship and Relevance. These are dimensions which demonstrate that the user’s needs, preferences and views are important. Design typically sits in the middle, with the individual elements of Design mirroring the broader story, the functional elements are outperforming those that go beyond and ensure that citizens want to use the service rather than have to.
Why does this matter?

The research considered the correlation of each dimension with overall impact to understand the relative importance of each dimension in driving the citizen experience, to identify what governments should prioritize to optimize the citizen experience.

**Citizen Journey** and **Mobile** are increasingly ‘hygiene’ factors for citizens: they are expected. As a result, they contribute less significantly to overall positive attitudes than other dimensions. Consequently, while good performance across these dimensions is still necessary (bad performance will impact overall attitudes), it is not sufficient to drive meaningful improvement in experience.

By contrast, **Design**, **Relationship** and **Relevance** are the dimensions most likely to achieve real impact in terms of positive experience.

In short, the aspects of online experience which matter most to citizens are **Relationship** and **Relevance** – areas where governments are generally reported as performing less well. Governments who focus on these dimensions have the opportunity to drive meaningful changes to citizen experience and secure the potential financial and social benefits that a positive experience can bring.
DIMENSION 1
Citizen Journey
What it is

The start of the online Citizen Journey is the point at which the citizen is ready to engage with the government and ends when their needs have been fulfilled.

Indicators and insights

An ideal Citizen Journey is a seamless end-to-end experience, across channels and over time, the experience of seeking information, completing a task, or a combination of both, is consistent and coherent. In a positive citizen journey, the entire process can be completed online, and there is support available where necessary to overcome any potential obstacles.

Across all countries and services, the most important feature for improving citizen digital experience was the ability to save and continue later. The desire for this functionality is particularly strong in services that involve submitting information forms such as passport application, government benefit services and personal tax services, where almost one quarter of citizens indicated a desire for pre-filled documents to facilitate the process. This element of the Citizen Journey can be seen to align with Dimension 4: Relevance, which identifies the importance of personalized, tailored services in facilitating a positive experience.

The need for reassurance and the human touch is also very strong. The perceived loss of human guidance or reassurance while navigating systems felt to be complex can be another reason why citizens drop out of an online journey. More than one third of people choose instant online communication and support as a key feature they would like to see in future, and almost as many desire a feature to highlight when they have made mistakes. The more information-heavy, complex and sensitive the task – such as benefits and taxes – the greater the need is for reassurance.

The research identified that, of all the five dimensions, most countries tended to perform highest on citizen journey. Yet there is still significant scope for improvement across this dimension globally. Speed and efficiency consistently emerge as paramount in delivering an optimal citizen journey.
Features that enable people to seek guidance in the moment – such as integrated chat support that detects what page people are on – are a crucial next step in the evolution of the online government experience. Such measures ensure that more people can complete transactions via one channel, reinforcing efficiency and building a stronger relationship with government. This aligns with and reinforces the importance of Dimension 5: Relationship, which recognizes the value that citizens place on having a mechanism for dialog.

### Desired Future Improvements to Government Services

<table>
<thead>
<tr>
<th>Feature</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saving in session</td>
<td>39%</td>
<td>31%</td>
<td>32%</td>
<td>32%</td>
<td>30%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Instant online communication for help</td>
<td>44%</td>
<td>28%</td>
<td>27%</td>
<td>31%</td>
<td>30%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Being offered additional relevant information</td>
<td>34%</td>
<td>19%</td>
<td>22%</td>
<td>26%</td>
<td>21%</td>
<td>23%</td>
<td>15%</td>
</tr>
<tr>
<td>Flagging mistakes I’ve made</td>
<td>27%</td>
<td>19%</td>
<td>21%</td>
<td>20%</td>
<td>19%</td>
<td>29%</td>
<td>21%</td>
</tr>
<tr>
<td>Being sent related information by email or text</td>
<td>36%</td>
<td>20%</td>
<td>22%</td>
<td>21%</td>
<td>23%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Being able to switch devices without starting again</td>
<td>29%</td>
<td>17%</td>
<td>19%</td>
<td>17%</td>
<td>19%</td>
<td>18%</td>
<td>21%</td>
</tr>
<tr>
<td>Having pre-populated information/forms</td>
<td>28%</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
<td>18%</td>
<td>18%</td>
<td>18%</td>
</tr>
</tbody>
</table>
Country results: citizen journey

**Dimensions:**
- **Country results:** citizen journey
- **Performance:** High, Low
- **Importance:** Low, High

**Countries:**
- **Country A**
- **Country B**
- **Country C**
- **Country D**
- **Country E**
- **Country F**
- **Country G**

**Notable Quotes:**
- **Efficiency**
  - "It was quick for me to do what I needed to online"
- **Single Journey**
  - "I could do/access everything online"
- **Right Support**
  - "I did not have to go offline to get help to use the service"
Why it matters

**DEMONSTRATE CITIZEN UNDERSTANDING**
Organizations are still struggling to map touchpoints and understand Citizen Journeys\(^\text{12}\). This results in journeys shaped by departmental siloes and internal bureaucracy, instead of citizen needs. The ability to put the citizen at the heart of service delivery will be a key driver in re-establishing trust and delivering services that fulfill their potential to drive social and financial benefits.

**TIME EFFICIENCY**
A quick and efficient Citizen Journey is one of the most straightforward ways of demonstrating the value of digital transformation. A clear improvement in the value equation (time spent versus outcome) could act as a powerful driver for uptake of online public sector services, where one of the most common negative attitudes expressed is slowness.

**CITIZEN EMPOWERMENT**
Online services must empower citizens to complete processes online. As frustrating as long queues are, for many services and situations citizens will continue to prefer face to face service if they cannot easily complete a process online.

**SIMPLIFICATION**
Perceived complexity can result in a belief that online completion of a particular task is not possible. An online journey with fewer and simpler steps (and available support at critical moments) will simultaneously reduce drop-off and shift attitudes.

**PROACTIVITY**
Citizens’ experiences start long before they reach a government website, so the optimal journey should react to citizens’ signals of intent (e.g. search, social media) to funnel them towards the solutions that meet their needs, and then guide them through the experience.

**BUILDING A LONG-TERM RELATIONSHIP**
Citizens interact with public services over the long-term, not merely in one-off transactions. Customer Relationship Management (CRM) tools can be applied to public services to predict which additional services or information may be useful and proactively offer them to citizens to create deeper engagement.

**THE RISK OF EXCLUSION**
A poorly formulated Citizen Journey can also become imbued with political meaning. An inefficient Citizen Journey – in applying for benefits or citizenship, for example - can be viewed as purposeful, consequently creating or reinforcing barriers between the citizen and the establishment.

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\(^{12}\) In 2014, only 25% of organisations had mapped their citizen journey, Altimeter, The State of Digital Transformation, 2014
CITIZEN TESTIMONIAL

Laura is a busy working mother with two young children, so the internet plays a key role in helping her do everything, from keeping in touch with friends to managing her household finances. Going online is the default, the preferred option for shopping and accessing services because it is convenient and should be faster. For Laura, these are the critical factors that will drive a positive experience of any public or commercial service.

On a recent trip across a river in a large metropolitan European city, Laura and her family used a bridge with a toll. On the crossing, they saw a sign telling them that they would have to pay a toll fare to use the bridge, but it was a hectic day and Laura forgot to pay online via the Toll Charge website. Shortly afterwards, she received a postal letter reminder to use the online Toll Charge to pay for her journey – sent automatically using her car registration details.

The online service was easy to use, fast and designed from the user perspective. There was no need to go to the trouble of creating an account to make a one-off payment – seen by Laura to be a key benefit. And, in recognition that this was her first use of the crossing, Laura's fine for late payment was automatically waived, leaving Laura feeling very positive overall about her experience of the service.

“It was easy. They had thought about their customers. They had done their research. Because it is a bridge that a lot of people go over, they have to make it simple. You can do it without logging on ... If I was [using the Toll Crossing] on a regular basis I would log on, make an account and then if there were any changes with fees or roadworks with the bridge, they could email me.”
DIMENSION 2

Mobile
What it is

This dimension relates to the use of smartphones and tablets, and whether a particular service is optimized and responsive on and across these devices. This is critical for service accessibility, especially in countries where the mobile device might be the only connected device that the citizen has access to.

Mobile-accessibility provides a lens for illustrating the distinction between basic functionality and experience. For the majority of online services, if it can be accessed on a computer, it can be accessed on a mobile device. This does not, however, take into account the distinct experience of using a service on a smartphone and how this might impact usability. Further questions must be considered: does font size adjust to smaller screen size? Does the page layout adapt between horizontal and vertical? Can I begin on my laptop then complete on my tablet? These questions speak to a stage of “mobile responsiveness,” where mobile use is considered and built in from the start.

Indicators and insights

Mobile-responsiveness is particularly vital for services that are used more frequently, such as those supporting citizens looking for employment, as these tend to have higher levels of mobile use.

Use of mobile to access government services varies by country and by service type, but in all markets a significant proportion are using government services via mobile. However, only around half or less of service users agreed that it was easy to access and use the service on their mobile phone. While services are performing better on offering multi-channel accessibility, there is still clearly room for improvement in delivering a positive citizen experience across all those channels. In one large federal state, for example, only 59% of federal websites are mobile-friendly and only 36% are optimized for a fast mobile experience13.

13 Information Technology & Innovation Foundation, 2017
Country results: mobile

**COUNTRY A**

**COUNTRY B**

**MOBILE-ENABLED**

“The service was easy to access and use on my mobile phone”

**MULTI-CHANNEL**

“I could use whatever device I wanted”

**COUNTRY C**

**COUNTRY D**
Why it matters

KEEPING UP WITH DIGITAL HABITS
There is a global trend towards mobile\textsuperscript{14} which is evident at both a geographic and a demographic level. In some countries, the ability to find information and complete transactions on a mobile phone is critical: it may be the only source of internet access.

In the developing country included in this research, for example, mobile ownership is higher than laptop or desktop computer ownership\textsuperscript{15}. In another large federal state, 12% of users\textsuperscript{16} do not have at-home internet access beyond their smartphone. Because governments face an imperative to provide access to all, mobile optimization and responsiveness must be a priority, with a mobile-first design approach considered for all online experiences.

CONSISTENCY AND COHERENCE
The ability to move seamlessly between multiple channels is fast becoming a baseline for up-to-date online experiences. In the commercial sector, every touchpoint is a manifestation of a brand and must align to the same standards for a consistent user experience. The same will increasingly be expected of governments, as citizens often view the government as one entity, not as siloed departments and organizations. Delivering an experience which feels consistent across the range of devices that citizens use to access online services helps to provide reassurance – crucial for transactions – and further demonstrating a government’s desire to build trust with its citizens.

\textsuperscript{14} Kantar TNS, Connected Life Study 2016/17
\textsuperscript{15} Ibid
\textsuperscript{16} Pew Research Center, Smartphone dependency, 2016
CITIZEN TESTIMONIAL

Driving License Application

Shriya relies on technology to stay connected with her friends and family - she spends much of her time travelling for social and leisure activities. As a young, modern woman, Shriya has high expectations when it comes to technology - everything should be quick, easy to use and have an attractive interface.

Before starting university, Shriya wanted to buy a car to help her live more independently. The first step was to apply for a driving license, which she did via her country’s online transport service. Given her busy schedule, she started the application on her mobile and was pleased with the intuitive layout and design of the site, and the speed of access. However, she did not complete the application immediately due to a lack of time and necessary information, and the next time she accessed the application form – this time via her desktop – she found it a much less user-centric experience and markedly different from the mobile site.

“On mobile the important information comes up first while it was down there on the laptop… it’s great to do it using a mobile.”

A more effective multi-channel approach would have taken Shriya’s experience to the next level, and further built trust and good will between her and the government.
CITIZEN TESTIMONIAL

Registering to vote

Emma is a busy mother of two young children who works part-time, so has a limited amount of free time when she can complete her errands. She likes to complete tasks on her mobile while on the bus or walking in order to get things done as quickly and efficiently as possible, and especially values functions that pre-fill forms with predictive content to help her save time. She relies heavily on online and especially mobile tools to help her achieve what she needs to, and likes services that are “straightforward, easy, and to the point”.

For a recent election, Emma needed to register to vote – something she had done when she was younger, but had not done recently. She saw a Facebook post reminding her to register before the upcoming election and decided to do so online, by clicking on the link provided in the post. A printed form was out of the question for her, as she does not have a printer and considers it more time-consuming to complete the paper process.

Via the mobile website, Emma was able to complete her voting registration very quickly.

“I found it so easy and straightforward, it only took a few minutes.”

She liked the mobile website’s clarity and concision, as well as the visual elements that helped guide her comprehension, such as visible green buttons to move to the next step and bolded text that highlighted key information. She felt that the design and aesthetic made the site easy to access and complete via her preferred mode of access, and was pleased at how easy-to-use, smooth, and quick the process was.

Testimonial drawn from primary qualitative research for this study
What it is

This dimension assesses the way in which the combined elements of graphics, visuals and content impact the successful use of a service.

Indicators and insights

Design accounts for all aesthetic considerations such as font, color scheme, graphics and other visual elements, as well as the organization of elements on the page. A focus on aesthetics should not be dismissed as superficial or simply cosmetic: Design has explicit implications for government objectives. Design can directly impact functionality and accessibility, at times being the decisive factor between a citizen’s ability to complete a task online or not. Good digital design can create the same or better emotional response as accessing the service in person\(^\text{17}\).

One fundamental aspect to Design is the extent to which elements are presented in a way that facilitates navigation and comprehension. Citizens indicated that they wanted services which minimized the need to scroll within a page, simplified navigation by reducing the number of clicks needed to find information, had simple options and required fewer decisions. Presenting services online that are well-signposted, simplified and intuitive are essential to transform frustration with online services into enjoyment of the experience.

Current performance in Design demonstrates many parallels with the overall citizen experience. Services are delivering better on basic, functional elements and less well on those that could take the citizen experience to the next level. Citizens need an aesthetic that makes them want to use the service. For all markets except two that we studied, this is one of the top two most important indicators driving a positive citizen experience. Alongside the demand for improved visual presentation, there is also scope to improve the extent to which government services support effective decision making.

\(^{17}\) Forrester, Good News And Bad News For Federal Digital Customer Experience, 2017
Country results: design

**COUNTRY A**

- **HIGH** Performance (Red)
- **LOW** Performance (Pink)
- **HIGH** Importance (Dark Purple)
- **LOW** Importance (Light Purple)

**COUNTRY B**

- **HIGH** Performance (Red)
- **LOW** Performance (Pink)
- **HIGH** Importance (Dark Purple)
- **LOW** Importance (Light Purple)

**COUNTRY C**

- **HIGH** Performance (Red)
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- **HIGH** Importance (Dark Purple)
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**COUNTRY E**

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**COUNTRY F**

- **HIGH** Performance (Red)
- **LOW** Performance (Pink)
- **HIGH** Importance (Dark Purple)
- **LOW** Importance (Light Purple)

**COUNTRY G**

- **HIGH** Performance (Red)
- **LOW** Performance (Pink)
- **HIGH** Importance (Dark Purple)
- **LOW** Importance (Light Purple)

- **ATTRACTIVE**
  - “The look and feel made me want to use the online service”

- **EASY TO USE**
  - “It was easy to use”

- **FUNCTIONAL**
  - “It was easy to find/do what I needed”

- **EXCEEDS EXPECTATIONS**
  - “I was pleasantly surprised by the appearance of the service”

- **SUPPORTS DECISIONS**
  - “It helped me make a decision about what to do”
Why it matters

**OPTIMIZING BEHAVIORS AND BENEFITS**

Good Design can minimize the time needed to complete tasks online, presenting citizens with cues to move through an otherwise complex process. An intuitive layout can facilitate effective decision-making and ensure that a journey is completed online.

By contrast, bad Design can act as a roadblock to completion and undermine citizen confidence in online services, impacting uptake and increasing offline contact.

**SUSTAINING THE NATIONAL NARRATIVE**

At a time when the world is increasingly engaging with information visually\(^\text{18}\), Design can have a significant impact on citizens’ relationship and attitudes toward governments. Inconsistent visual identity and ineffective Design can reflect poorly on governments’ ability to provide services for the 21st Century. This can result in a lack of investment or valuable human capital, carrying significant economic consequences for governments.

**TRANSPARENCY**

In the commercial sector, Design is often used to convey personality and transparency: it is a way of engaging people as partners and advocates. By contrast, bad Design can be synonymous with opacity and a lack of concern for the consumer, consequently becoming a cause for distrust.

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\(^\text{18}\) In 2015, The Oxford English Dictionary word of the year was an emoji
AN OPPORTUNITY TO ENGAGE CITIZENS

As a service provider to whole populations, the ability of governments to design something unanimously appropriate and pleasing is a challenge. The attempt to please everyone can often result in pleasing no one. Consequently, governments should not only consider Design in terms of cosmetic choices, but as a way of maximizing usability. This can only be achieved by engaging with citizens throughout the development of services and by also focusing attention on **Dimension 4: Relevance**, where services are responsive to the needs of citizens.

ADAPTING TO INDIVIDUAL NEEDS

Today, the most advanced digital government teams use audience research and continuous feedback to iteratively improve the Design of digital government services. Instead of testing to find the single ‘best’ solution, design teams should use dynamic multivariate testing to find the best solution for each user. Machine learning can help ensure that every user interaction automatically improves the next. Deep user insight, audience research and testing will still play an important role in optimizing digital services. But the adaptive layer will yield significant marginal improvements19.

OPPORTUNITY TO ENGAGE

The best Design examples in government deliver content through positive emotional experiences using storytelling and dynamic content, rather than presenting static lists of what government departments and services are available online20.

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20. One example of this can be found at VisitFlorida.com: Adobe, How Visit Florida is Better Serving Tourists in 2017, and Serving the Purpose to Brighten the Lives of All, 2017
For many people, the internet is now the first place they go to search for answers to questions. Mila, a student from a large European city, goes online regularly, using the internet as a study resource but also as a key way of connecting with friends and sharing things of interest. Design is important to Mila and she calls Instagram out as a great example of this – it is highly visual and its design makes it easy to see what is happening in her friends’ lives.

In 2017, Mila started exploring options for universities and undergraduate course applications via various online search engines. One of the sites she accessed was the federal employment agency – the largest provider of labor market services in her country.

Mila found it aesthetically pleasing, with the Design supporting the functionality as everything was clear on each page from first glance. The attractive and simple layout exceeded Mila’s expectations and challenged her perception of government services. Importantly, it also left Mila confident that she had the information needed to inform her decision making, and feeling positive toward the Federal Employment Agency.

“\textit{I would have thought [a government website] would be just text and everything would be presented dryly but the employment website was great, really modern looking, and I was left with the feeling that I had found all the information I was looking for.}”

\textit{Testimonial drawn from primary qualitative research for this study}
Kasey is a married young mother who has recently been on maternity leave, which qualifies her for maternity leave payments from the government. In order to receive these benefits, she must submit forms and documents two or three times a month, and as Kasey is very tech-savvy and strategic about how she spends her time, she appreciates being able to manage her government benefits via a mobile app.

She regularly uses the app to check when her next payment will be as well as to upload supporting documents. When she first downloaded it, the app surprised and delighted her with its ease of use and its modern and personalized Design features.

“The [government benefits] app is actually really good. It’s really clear and straightforward, simple and intuitive. It has an overview where you can see all of your family’s information, incoming documents and set reminders. You can upload a document, lodge a form, take a picture of something and send it straight away – it’s really quite good.”

Kasey finds the interface smart and intuitive, paralleling functionalities and Design features she is used to from social media platforms, such as swiping left or right to choose options and file upload features similar to those of Facebook. Reminders and the top of her screen help alert her of what tasks she needs to complete, and where she can complete them, in addition, exclamation points indicating incomplete information ensure she can submit information accurately and efficiently. Large buttons and drop-down menus help her to navigate easily on her mobile and allow her to expand the most essential information if she needs it.

“Because they have your needs, alerts and notifications central it helps you find what you need to do and they are walking you through that check list from one page to the next and it all starts with hey you have a task, here’s what’s happening.”

She is also reassured that the app stores her information, saving her the need to re-enter information multiple times, and that it is password protected so that she knows her stored information is secure. These Design features that are easy to understand and guide the user quickly to their key tasks give Kasey the sense that the government agency values her and her needs.

Testimonial drawn from primary qualitative research for this study
DIMENSION 4

Relevance
What it is

Relevance is the extent to which an online experience is tailored to the user, either at the individual or group level.

Indicators and insights

Relevance can be achieved in a variety of ways. It often manifests as data-driven personalization like pre-population of forms or targeted, proactive outbound communication, but can also be achieved by providing accessibility options and online support such as webchat.

For all countries, Relevance stands out as the weakest dimension, yet it is fundamental in driving the overall citizen experience. Our study reveals that within Relevance, governments are delivering best on offering services that adapt to citizen needs, but there is still significant room for improvement here and on all elements of Relevance.

In a context where people are used to personalized news, recommended items to purchase, and suggested videos to watch, they also expect a certain level of personalization from their interactions with government. Citizens in our study expressed strong interest in government agencies proactively suggesting related information and services to educate and inspire them, but only a minority felt services currently delivered on this. This demand for predictive content was particularly strong for employment-related services, and for leisure activities such as national parks, tourism and rail travel.

Nevertheless, concerns about privacy and governments’ use of data can counterbalance the desire for personalization. Our study revealed some skepticism regarding governments’ ability to exploit personal data judiciously to enhance the online experience. Therefore, our findings indicate that it is important for governments to clearly and proactively reassure citizens that their personal data will be treated carefully and respectfully.

The provision of a relevant and tailored experience relies on the effective use of data, which remains a point of concern for some in government, either due to internal regulation or to a perceived resistance from the public. Overcoming the former relies on structural progress towards safe and easy data sharing within government, and dedicated resources for management; overcoming the latter requires transparency, engagement and raising citizen awareness about data use.

### ATTITUDES TOWARDS INTER-DEPARTMENTAL GOVERNMENT SHARING OF PERSONAL DATA IN ORDER TO PROVIDE BETTER SERVICES

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- **Support**
- **Neutral**
- **Sceptical**
Country results: relevance

**COUNTRY A**

**COUNTRY B**

- **ADAPTIVE RESPONSE**
  “The service was adapted to my needs, e.g. provided or asked for relevant information”

- **PREDICTIVE CONTENT**
  “It suggested other extra information or services relevant to my needs”

- **PRE-POPULATION**
  “The service already had some of my information, so it was quicker for me to do what I needed to do”
Why it matters

SHORTENING ATTENTION SPANS
People are demanding Relevance across both the public and private sector. At a time of increasing ‘infobesity’\(^2\), attention spans are shortening and consumers are increasingly expecting filtered and personalized content. Information and services that can do so will have a better chance to cut through and engage citizens.

TRUST
One of the greatest barriers to adoption of digital services is a pervasive sense amongst citizens that their case is unique. Providing a more relevant experience can increase trust, which is critical for citizens when accessing sensitive government services such as filing tax returns.

DRIVING AND OPTIMIZING SERVICE USAGE
Tailoring and adapting content can increase compliance and speed of completion for users, an important added value that can help drive adoption, in turn allowing governments to optimize the service and deliver increasingly more relevant online experiences.

TRANSPARENCY
As government services often involve personal and sensitive data, the onus is on these agencies to communicate why they are collecting certain information, and what the end benefit for the citizen will be of features like form pre-population and suggestion services.

\(^2\) An age of infobesity and short attention spans
Citizen Testimonial

Personal tax accounts

Going online is the default option for Peter when it comes to things like shopping or banking due to its speed and efficiency. However, when it comes to government services, Peter considers himself “old school”.

Every year Peter completes his tax return, a process which can be time-consuming and which causes anxiety as to whether everything has been done correctly and received on time. In recent years Peter has completed his tax return using his governments’ online account. Although he finds the deadlines confusing and acknowledges dealing with tax issues requires a lot of concentration, the personalization functionality introduced into his account makes it easier.

“It’s already given me a message to say that no tax is due at the moment. It is also telling me that I’ve finished one year and I’m on to the next year now.”

Peter feels more confident doing his tax online now as there are a variety of options to get in touch if he needs a little extra support.

“There is a webchat so you can actually chat to someone online. You send a message and at the same time they answer you. It’s pretty good. It’s quite like WhatsApp actually.”

By making the most relevant information easy to access and offering a variety of contact methods, his government made it easy for Peter to do his tax correctly and on time.

*Citizen Testimonial drawn from primary qualitative research for this study*
What it is

This dimension refers to how the experience of using a service affects the relationship between the citizen and the organization.

Indicators and insights

Positive indicators of Relationship are enjoyment of service use, and the creation of a meaningful dialog with citizens. Our study suggests that a positive citizen experience relies on a strong performance in Relationship. However, these are typically among the least well-performing indicators in each country, and therefore a key focus for improvement.

The me.gov report sets out how governments can use digital services to deepen levels of engagement with citizens. Applying the principles of me.gov means adopting a brand experience approach to digital public services, taking into consideration the look and feel of digital experiences, as well as tone of voice, interaction and user journeys.

Where Relationships are optimized, governments offer a diversity of online experiences to reflect the different types of Relationship that citizens want from their public services. For example, citizens expect a different kind of Relationship with their tax authority than they have with elderly care services. At the same time, the need for diverse experiences must be balanced with the need for government to appear cohesive and coordinated. Getting this right requires a nuanced brand architecture, rooted in the local political context. Multiple brand experiences need not undermine the cost benefits of centralizing government digital infrastructure.

Country results: relationship

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- **ENJOYMENT**
  
  “I enjoyed using the online service”

- **TWO-WAY DIALOG**
  
  “The service allowed me to easily communicate with the service provider”
Why it matters

CREATING A DIALOG
While each of the five dimensions feed into the creation of trust and Relationship, what distinguishes this dimension is the focus on dialog. Some feel a concern that a shift towards online provision of public services will destroy the civic fabric that holds government and citizens together. The human touch will be lost. However, as populations diversify and commercial brands serve up more personalization, the ability to communicate proactively as well as reactively with more tailored messaging becomes increasingly important. Technology can help services move beyond pure transactions to ensure that users are involved in an ongoing relationship with the service provider. This gives citizens more than a rational and functional service; it adds an emotional benefit. It provides citizens with a sense of esteem and connection to their community and the wider State.

A good example of this concept being embraced is a large federal state tourism website, which builds a closer relationship with tourists and citizens by curating user-generated content to surface the best of what travelers see when visiting that country. Highlighting publicly generated content encourages engagement, builds a stronger Relationship, and celebrates the voice of the global citizens visiting their country, attracting future visitors with authentic experiences.

INITIATING ADVOCATES
A strong Relationship allows governments to foster communities and conversations amongst citizens and create advocates. Using the online experience is an opportunity to engage with citizens, and by proxy to encourage them to engage fellow citizens in conversation about the benefits therein. This is a powerful tool for widespread adoption of services and reflects the current trend of peer referral that is expected to grow in future.

TRUST
Rebuilding Relationships with citizens should be a priority for governments. This will increase goodwill, compliance and engagement, and improve governments’ ability to provide effective public services, as well as ultimately leading to better social outcomes. Trust is more important than ever. Indeed, WPP’s Government & Public Sector Practice and Kantar Public’s recent global thought leadership report, the Leaders’ Report, presented at the 2017 World Economic Forum at Davos, reported a global sense that trust in government has declined dramatically. Presenting online services is an accessible way that reinforces Relationship is central to rebuilding trust and allowing both government and citizens to fully reap the benefits of online services.

Ben is a university student currently studying for a law degree. Online services are woven throughout his daily life, whether for online shopping, banking and investing, or to check social media, so he sees many advantages to accessing government services online, as long as they are clear, efficient and well-designed.

As a student who has recently moved back with his parents while continuing his studies, Ben wants to check on his federal financial aid and how it would be impacted. He uses the website to submit his financial aid applications each year, and finds the design very clear, uncluttered and visually appealing.

“Very clean, as I would expect a good website to be. You can see whose website it is and what it is primarily about. I like the bar at the top for the main sections very much. I think it is well-designed and clear. There is not too much text and the headings are good.”

Ben finds it easy to navigate the website, with the links to key tools and information clearly visible on the landing page. He also finds links to an info center and hotline reassuring in case he needs further information that he can’t access on the website.

“Things are developing. You can see that they are trying to make use of new technologies, that the pages are well-designed and that they are trying to make them accessible to all people.”

Ben feels that the government agency has put a lot of effort and thought into the website’s purpose and what users want to see. He finds this website to be helpful and relevant, improving his opinion of the government agency, and says he would recommend the website to his friends.

Testimonial drawn from primary qualitative research for this study
Conclusion
Global survey results and insights on digital citizen services
Serving citizens on their terms

As previously outlined\(^2\), governments have been on a journey from departments.gov (a fragmented and inconsistent set of largely informational public services) to services.gov (more holistic and user-centered services, with improved technical functionality to support transactions). They are still a long way off providing citizens with the kind of experiences that are commonplace in their interactions with brands and commercial services. The key difference here is that commercial enterprises can more adequately measure the value in terms of economic performance of providing a positive experience.

Only through a focus on experience will it be possible for governments to fully realize the benefits of digital transformation: more cost-effective service delivery, greater time efficiencies for citizens, increased accuracy of transactions, improvements in satisfaction, and corresponding benefits in citizens’ relationship with the State. Citizens are both individuals and members of communities, with their own identities, needs and preferences. In the future, the ideal experience of a digital public service will be one that intuitively understands and accommodates these needs and preferences, recognizing and respecting the citizen not just as a service user, but as a person.

It is not difficult to imagine accessing digital public services that predict the type of content or nature of transaction you are seeking to access, that pre-populate forms to reduce user burden, and to automatically sense-check information to reduce the chances of user error, or services that enable people to access them wherever and whenever they need to, across any platform, and actively support multi-channel use, or services which are so attractive and intuitive to use that they can almost be said to offer a pleasurable experience.

“In my view, delivering high quality online services is a progressive commitment of the government to show that it is willing to share and even relinquish power, build more transparency in the system and ensure things are done properly.”

- Citizen Testimonial

\(^2\) WPP, The Government & Public Sector Practice, me.gov, 2016
Good enough is not enough

In this report, five key dimensions have been identified that contribute to citizens’ online experience. In recent years, progress has been made on the more technical aspects of citizen experience – improvements to the functionality and accessibility of online services. As we have shown here, this has resulted in many countries providing services which are perceived as adequate by citizens. Adequate may be ‘good enough’, particularly in the context of services where the citizen has no option but to use them. However, as the pace of technological change accelerates and citizen expectations continue to rise, these services will soon be left behind. Meanwhile, governments will be missing out on the multitude of benefits that an enhanced citizen experience can bring.

The research underpinning this report has also demonstrated the relative importance of the different dimensions in shaping citizen perception of online services. This has revealed that governments are generally performing well on the dimensions now least likely to propel them forward in relation to citizen experience – those more functional dimensions of Citizen Journey and Mobile, where significant progress has already been made. While some of the dimensions such as Design and Relevance may seem ‘nice to have’ or inconsequential, these matter to citizens and are integral to provide services that citizens will use, thereby lowering costs, increasing engagement and creating trust.

Consequently, this research has clear implications for governments: while continual investment in functional dimensions is important, areas of under-performance must now also be addressed. This should be viewed as an opportunity for governments: it is a guide for meaningful action.
Conclusion

The next evolution of digital government

In order to develop beyond satisfactory services to ones that create enjoyment and develop a true relationship between citizens and government, agencies should consider four key areas to elaborate:

**TECHNOLOGY AS A MEANS, NOT AN END**

Moving services online is the beginning, not the end of digital transformation. Governments need to further study and understand citizens’ needs to design better experiences, with simpler navigation, more intuitive layouts, and a distinct and pleasant visual identity.

In parallel, governments need to improve the way they communicate with the public to convince those not yet sure of the benefits of online services that they will find tasks simpler, faster, more enjoyable and more secure. Only then will governments be able to realize the full potential and value that online services can bring.

**A PERSONALIZED, INTEGRATED EXPERIENCE**

To deliver on the promise of digital services, agencies should harmonize their presence across all contact points with service users, whether online or offline, with a consistent visual identity, providing the same services and information, and recognizing previous interactions and questions to quickly and seamlessly guide the citizen to their desired outcome.

Services and information should allow for targeting of content to individuals or different demographic groups, delivering more relevant help and information either based on user interactions during a session or, where user settings permit, based on previous activity with the service.

The benefits of greater targeting of content means that governments will need to be transparent about what data they are using and how they are using it, thus convincing citizens that they are capable of judiciously using personal data to deliver better service experiences.

**INSPIRING, EMOTIVE DESIGN**

Governments also need to attach greater importance to creating positive emotional experiences with users. Services need to evolve from dry, opaque and functional offerings to ones that are more aesthetically pleasing and easy to use, integrating a more relatable human tone to reassure users and counterbalance the perceived loss of the human touch when people use online services.

**EXPANDING THE CONVERSATION**

Citizens are also active social beings, sharing their opinions and experiences on social media. This presents an opportunity for governments to further engage people by curating and sharing experiences and feedback from the social web. This will demonstrate that they are open to dialog and interested in the needs of citizens, while creating citizen advocates and using their authentic words and content to engage and convince a wider audience. Proactively integrating and responding to what citizens are saying online is an opportunity for governments to demonstrate that they are dedicated to better serving their needs.
The time for action is now

Online services that provide a focus on experience are positioned to reap significant rewards. At a time when trust in government is at an all-time low, digital services are a powerful tool for re-engagement, as every interaction is an opportunity to connect, change perceptions and rebuild relationships. Digital is swiftly becoming the most widely accessible and prominent interface between citizens and government: the significance of this should not be understated. Regaining trust will create a virtuous cycle of performance and perception. In a democratic nation, trust is a license to operate, and directly impacts the ability to serve the public good.

By contrast, if governments do not seek improvement (across all dimensions, or with new emphasis on previously underinvested areas), the gap between citizen expectations and the delivery of online government services will only widen, and reinforce the divide between citizen and state. The pace of technological innovation means current digital infrastructure becomes rapidly obsolete, all while citizen expectations increase. This is not a time to stand still or take cautious steps; it is a time for proactive investment in strengthening the citizen experience.
Method

1.1. Desk research

In order to support the development of research tools and ground our research within existing literature, Kantar Public conducted extensive desk research which reviewed literature on citizens' views and experiences of online public services.

For each of the seven countries this covered official policy papers and strategy documents, useful statistics and case studies, third party specialist reports and insights, and further information illustrating digital government development. This also covered key studies and reports published by the UN, EU and management consultancies on the subject of digital government.

1.2. Quantitative survey

Online surveys were conducted in order to understand attitudes towards use and experience of national digital government services. Interviewing 7000 people i.e. over 1,000 adults aged 18-64 years old in each country (except one country, where the upper age limit was 44 years old) using the Kantar Online Omnibus. Data was weighted to be representative of the population aged 18-64 in each country (aged 18-44 in Country A). Citizens were asked which service areas they had used in the past year. Service users were then asked a series of follow up questions to assess how they used the service, their overall experience and how the service performed across a range of indicators relating to the 5 key dimensions. Experience scores were assigned to each country at an overall, dimension and individual service level, based on performance across the range of indicators. Scores were weighted to take into account the relative importance of each indicator in driving overall service impact (an aggregate measure of citizen satisfaction, likelihood to recommend and halo effect), to ensure that the scores fully reflect citizen preference. Kantar Public then considered the correlation of each dimension with overall impact to understand the relative importance of each dimension in driving the citizen experience, to identify what to prioritize to optimize the citizen experience.

1.3. Qualitative case studies

Kantar Public conducted accompanied surfing sessions with four citizens in each of the seven markets. This was to build in-depth case studies illustrating citizen experience overall, and in relation to each of the 5 dimensions of customer experience. Citizens were recruited on the basis that they had a 'need' to use a particular government service, for instance, to register to vote or renew a passport, submit information for a self-assessment tax return, or gather information relating to travel or tourism. Services were selected based on insight from the desk research and conversations with stakeholders in each market.

1.4. Social media

The social media data was extracted and analyzed through a social listening and analytics platform, NetBase. It was extracted through the development of a query, which acts similar to a questionnaire as it determines the kind of data elicited. The query consists of a combination of keywords and/or phrases that define the research topics, including restrictions about the country from which the data should be sourced, content sources (for this query all content from social platforms such as Twitter, forums, blogs, etc. were included but news sites were excluded), the time period (typically 12 months but sometimes less if there was a lot of data). The query development was iterative – after creating the initial queries, the resulting data was examined to refine it (i.e. remove irrelevant data). The social media analysis focused on a qualitative review of the data to extract relevant content that supported findings from the other research sources. Kantar Public reviewed the data qualitatively to understand what citizens were spontaneously saying when talking about these topics on social media. This provided contextual information and additional "flavor" to pertinent themes.
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