Deloitte.
Insights

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The digital citizen
US survey of how people perceive government digital services

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Introduction

Digital government services are increasingly important in meeting constituent needs

To better understand how individuals perceive digital services provided by government agencies, we surveyed 1,000 people in the United States along with an additional 857 respondents in the United States to conduct statistically valid analysis for race and ethnicity. 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.

In addition to the United States, Deloitte also surveyed 4,800 respondents across 12 countries. Read more about our global report **here**.

The analysis also considers 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 interact with government through digital channels

Only 23% of US respondents regularly (often + always) interact with government through digital channels, leaving governments with a long journey ahead to increase availability of digital services and boost adoption.

Key finding 2
Satisfaction lags the private sector

For respondents, satisfaction with digital government services in the United States lags those of private sector services by nearly 20%.

Key finding 3
Websites are preferred but hard to navigate

Most respondents prefer to interact with government through websites. However, difficulty navigating these sites is the biggest challenge respondents face while accessing digital services.

### Key finding 4
Big demographic differences in usage

There are stark differences between respondents for those who frequently use digital services and those who don't based on age, income, geography, education, and race, 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.
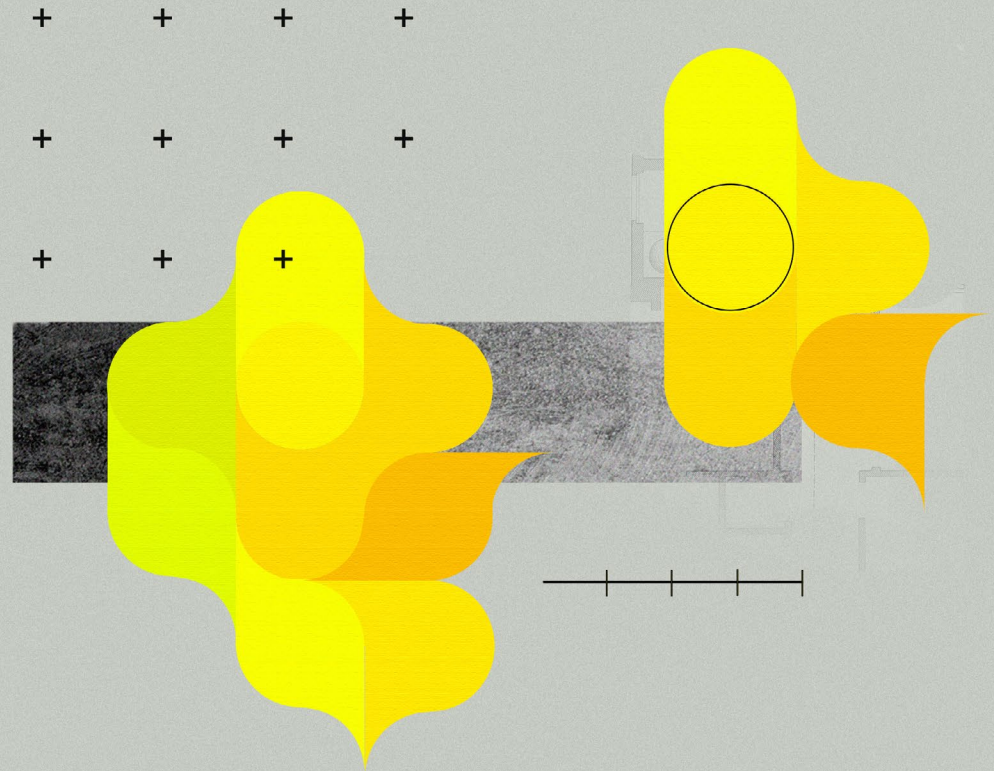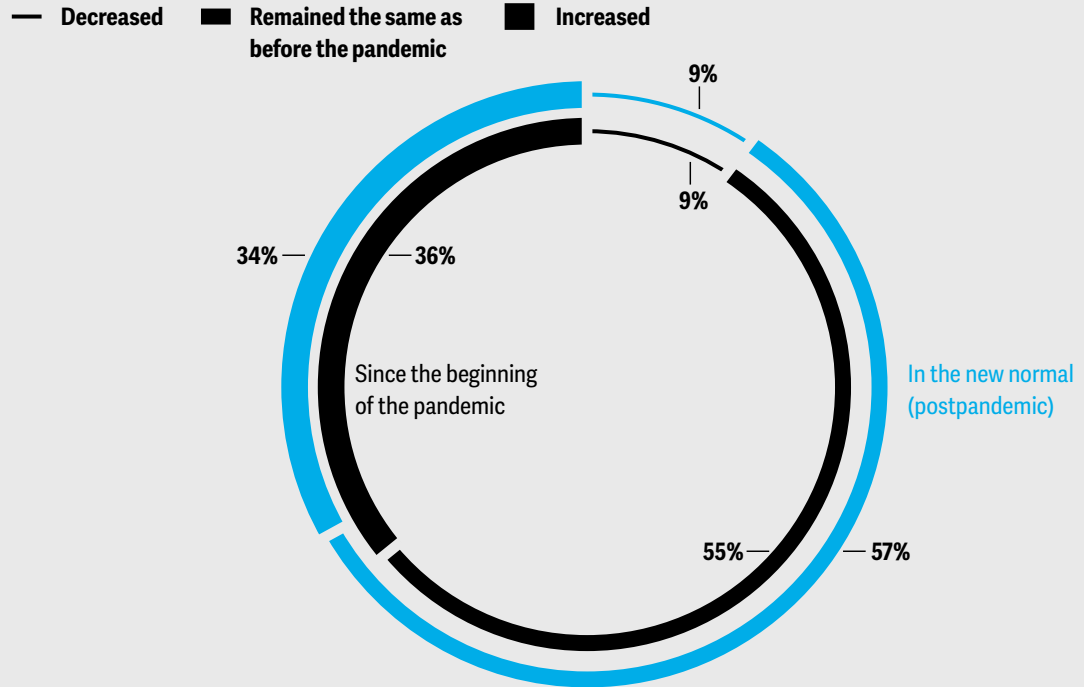
Few respondents frequently access government through digital channels—and when they do, satisfaction is low

The pandemic increased respondents' use of digital services by 36%—and going forward, usage is expected to increase even more

The pandemic has accelerated government's digital transformation efforts and changed the way many people access government services. COVID-19 turned out to be a tipping point for digital government services. From telehealth to virtual courts to virtual education—many government services were made available online.

Change in the use of government digital services

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

9%

9%

34%

36%

Since the beginning of the pandemic

In the new normal (postpandemic)

55%

57%

Source: 2023 Deloitte Digital Citizen Survey.

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

Only 23% of US respondents regularly (often + always) interact with government through digital channels, leaving governments with a long journey ahead to increase availability and boost adoption.

US average of interaction with government through digital channels

How often do you interact with government through digital channels?

23%
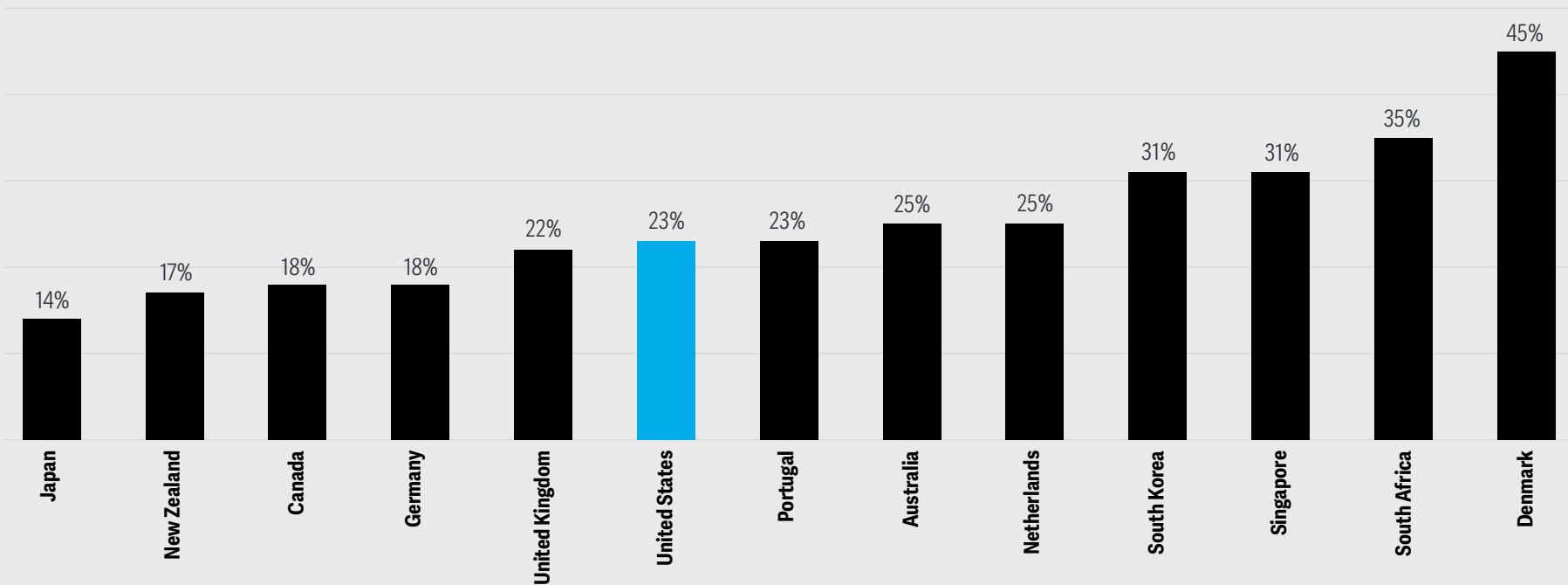**Often/ always**

43%
Rarely

34%
Sometimes
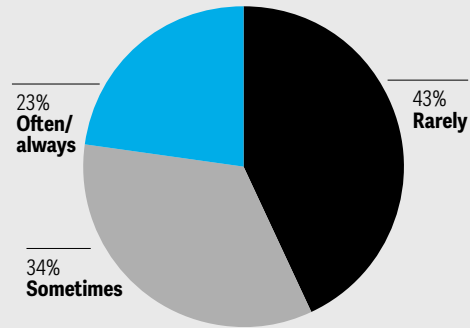
Source: 2023 Deloitte Digital Citizen Survey.

Interaction with digital services varies substantially by country

To increase usage of digital channels, agencies should adopt omnichannel strategies. An omnichannel strategy meets constituents where they are and within the context of their life (for example, by phone, in-person, web, mobile, etc.) while also accounting for realities such as areas with low or no internet bandwidth as well as digital literacy and accessibility gaps.

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

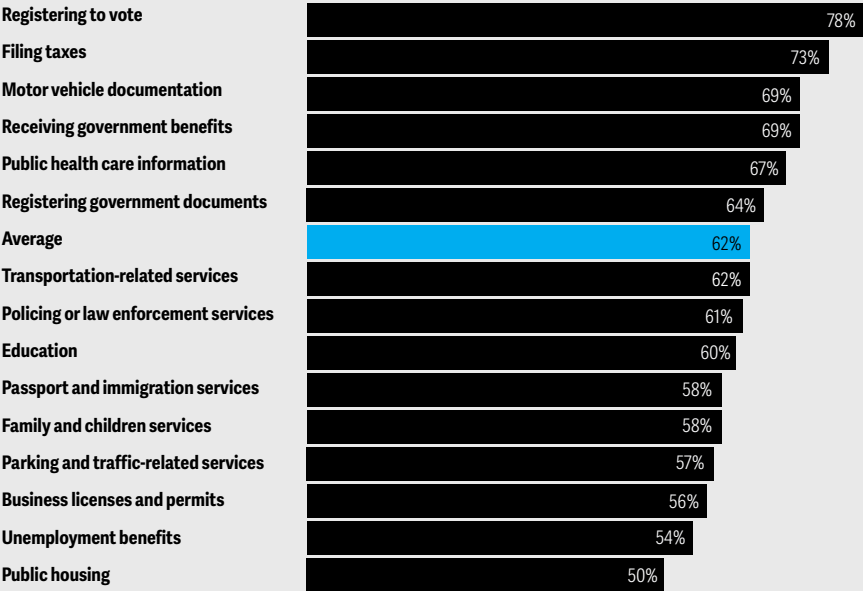| Country	Percentage
Japan	14%
New Zealand	17%
Canada	18%
Germany	18%
United Kingdom	22%
United States	23%
Portugal	23%
Australia	25%
Netherlands	25%
South Korea	31%
Singapore	31%
South Africa	35%
Denmark	45%

Source: 2023 Deloitte Digital Citizen Survey.

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

Nearly all online government services that were covered in the survey have satisfaction levels below the private sector services mentioned in the survey. 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
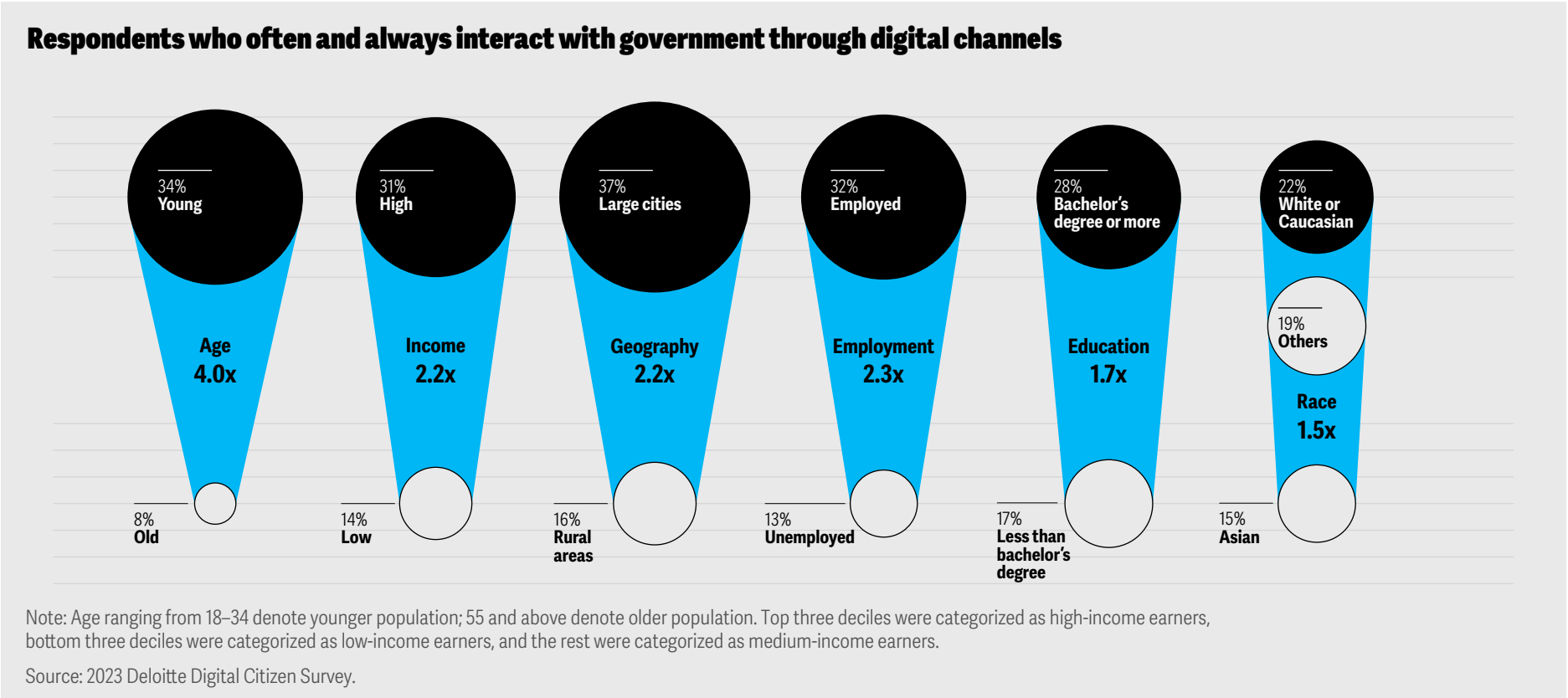### (satisfied and very satisfied)

Service	%
Registering to vote	78%
Filing taxes	73%
Motor vehicle documentation	69%
Receiving government benefits	69%
Public health care information	67%
Registering government documents	64%
Average	62%
Transportation-related services	62%
Policing or law enforcement services	61%
Education	60%
Passport and immigration services	58%
Family and children services	58%
Parking and traffic-related services	57%
Business licenses and permits	56%
Unemployment benefits	54%
Public housing	50%

Online private services
(satisfied and very satisfied)

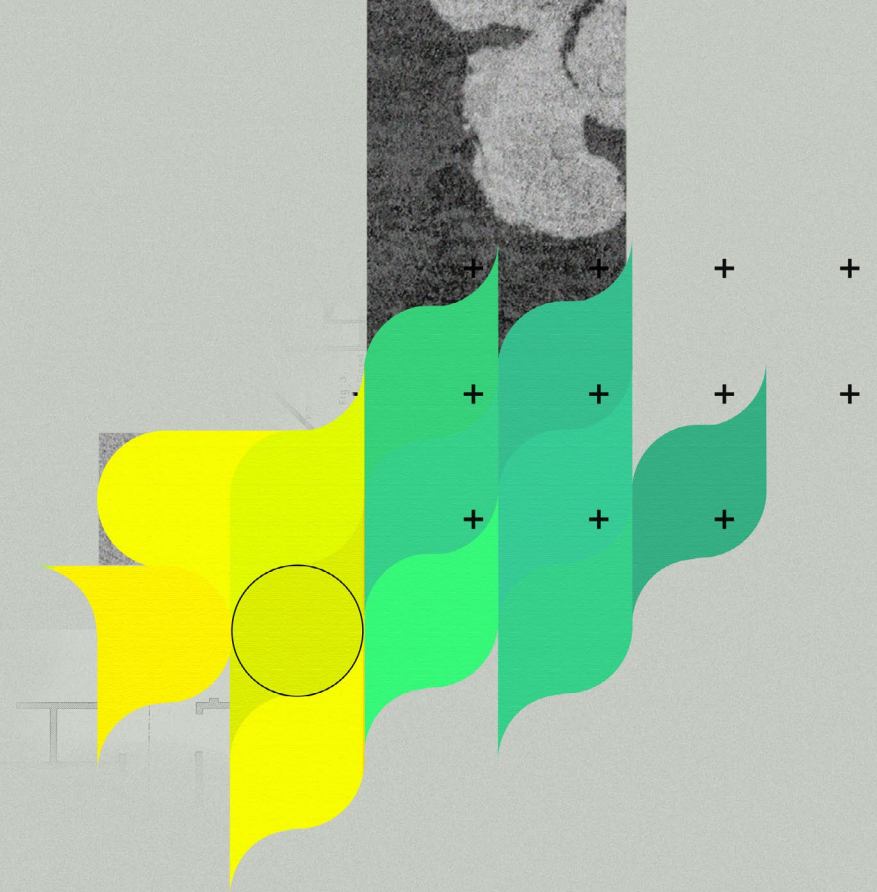| Service	%
Watching internet streaming apps	86%
Banking	83%
Shopping on e-commerce sites	83%
Average	81%
Paying utility bills	80%
Accessing social networking	78%
Booking medical appointments	75%

Source: 2023 Deloitte Digital Citizen Survey.

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.
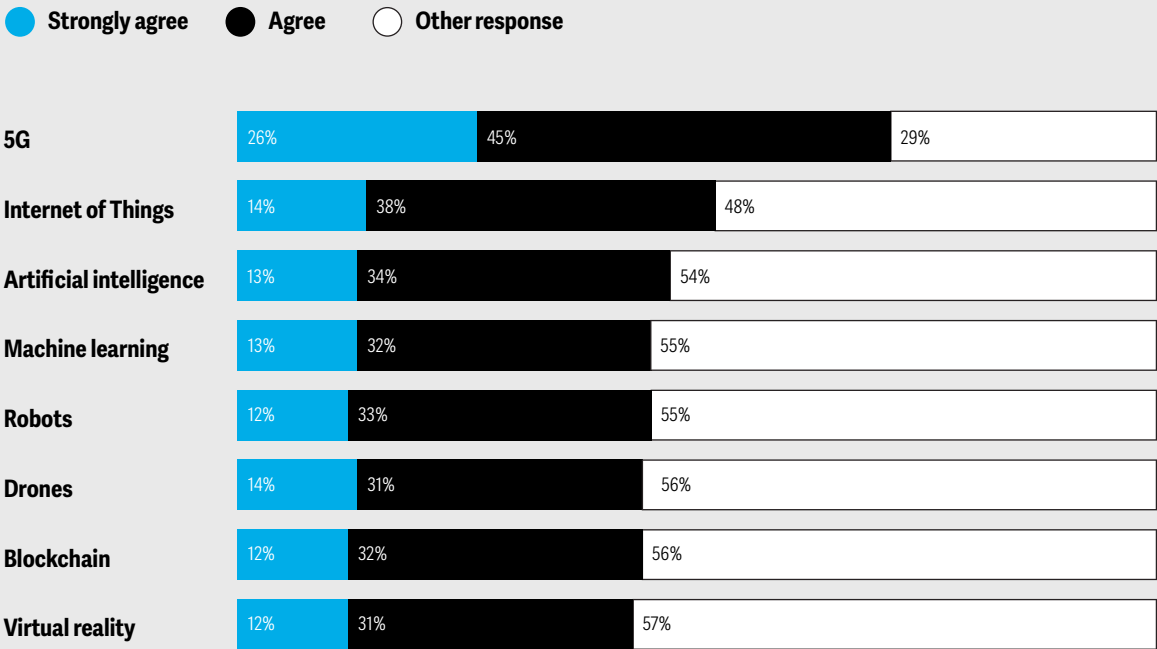
Respondents who often and always interact with government through digital channels

34% Young	31% High	37% Large cities	32% Employed	28% Bachelor's degree or more	22% White or Caucasian
					19% Others
Age 4.0x	**Income 2.2x**	**Geography 2.2x**	**Employment 2.3x**	**Education 1.7x**	**Race 1.5x**
8% Old	14% Low	16% Rural areas	13% Unemployed	17% Less than bachelor's degree	15% Asian

Note: Age ranging from 18–34 denote younger population; 55 and above denote older population. 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

● **Strongly agree**   ● **Agree**   ○ **Other response**

Technology	Strongly agree	Agree	Other response
5G	26%	45%	29%
Internet of Things	14%	38%	48%
Artificial intelligence	13%	34%	54%
Machine learning	13%	32%	55%
Robots	12%	33%	55%
Drones	14%	31%	56%
Blockchain	12%	32%	56%
Virtual reality	12%	31%	57%

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.

How do you like to interact with government services?

	Federal	State	Local/city
Website	56%	55%	50%
Call center			
Mobile application			
Face-to-face	18%	21%	28%
Web chat with an advisor			
Chatbot			
Interactive voice response			

Preference for face-to-face increases as services are provided more locally.

Source: 2023 Deloitte Digital Citizen Survey.
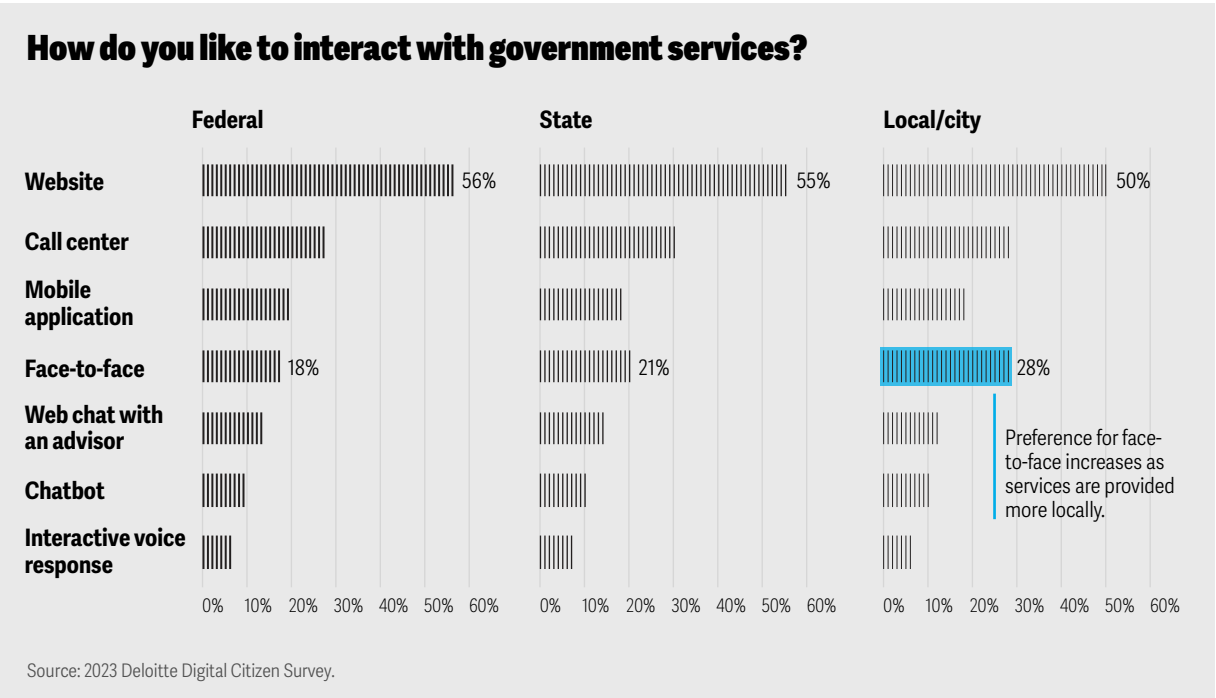
Only 6% of respondents like to interact through interactive voice response—this may be due to an outdated approach

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 a 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.

7%   7%
                              6%

Federal   **State**   **Local/ city**

Interactive voice response
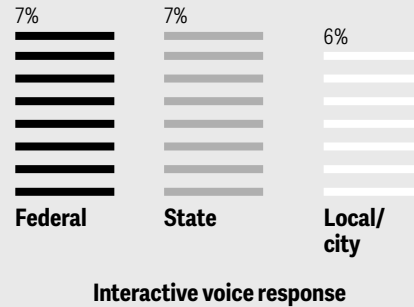
Source: 2023 Deloitte Digital Citizen Survey.

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

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

Read more about contact centers in the **delivering the digital state** study.

Challenges for respondents while accessing digital government services

Challenge	Percentage
Difficult to navigate government websites	38%
Concerns about privacy of my data	31%
Concerns about the security of my data	30%
Do not face any challenges	29%
Not enough knowledge of the internet to access digital services	13%
Limited or no access to the internet	12%
Other	2%
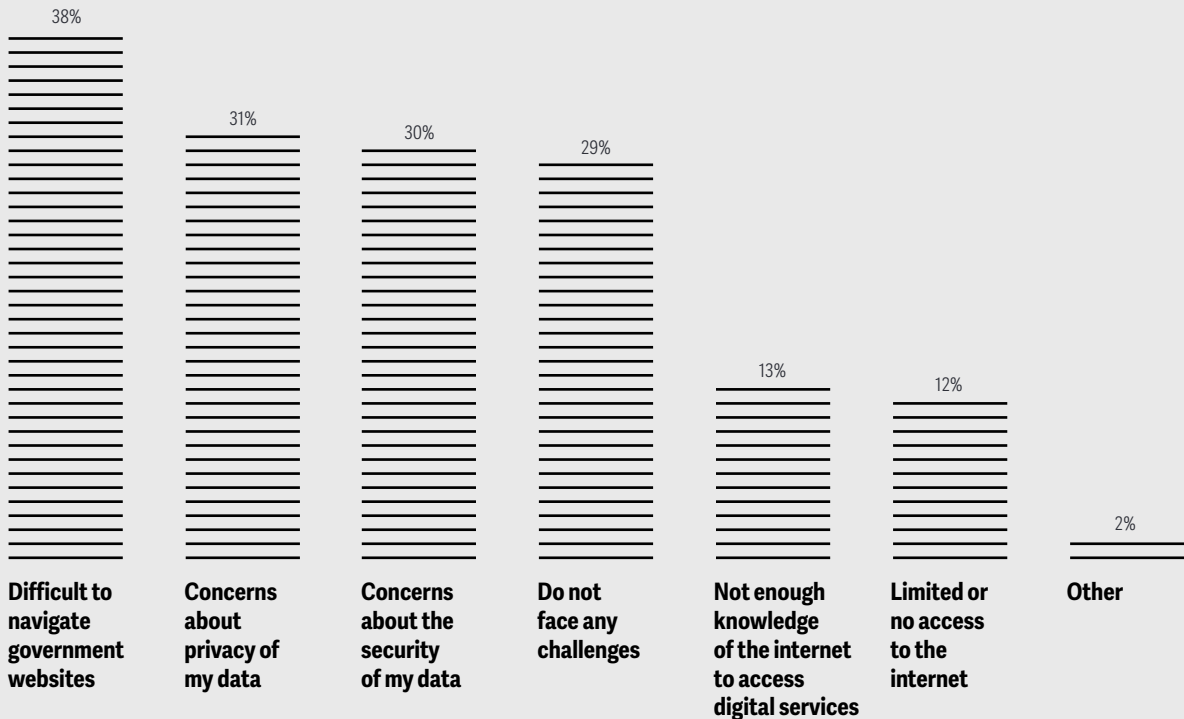
Source: 2023 Deloitte Digital Citizen Survey.

The challenges identified by respondents vary by race

- Difficulty in navigating websites is a top challenge for all respondents, with Asian and Hispanic or Latino respondents citing this issue most frequently.

- Similarly, Asian and Hispanic or Latino respondents have slightly higher levels of concern about the privacy and security of their data in comparison to others.

Challenges for respondents while accessing digital government services by race

● Asian ● Hispanic or Latino ○ Black or African American ● White or Caucasian

Difficult to navigate government websites
- 42%
- 39%
- 32%
- 36%

Concerns about the security of my data
- 39%
- 36%
- 30%
- 28%

Concerns about privacy of my data
- 38%
- 36%
- 35%
- 29%
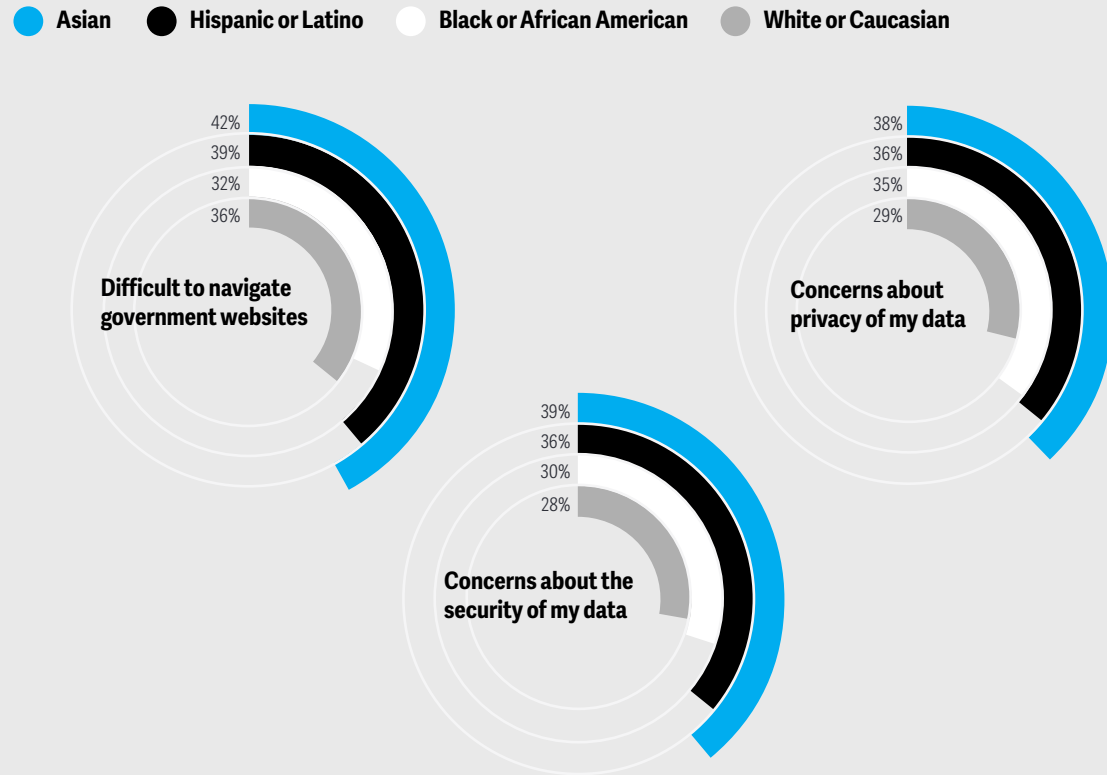
Source: 2023 Deloitte Digital Citizen Survey.
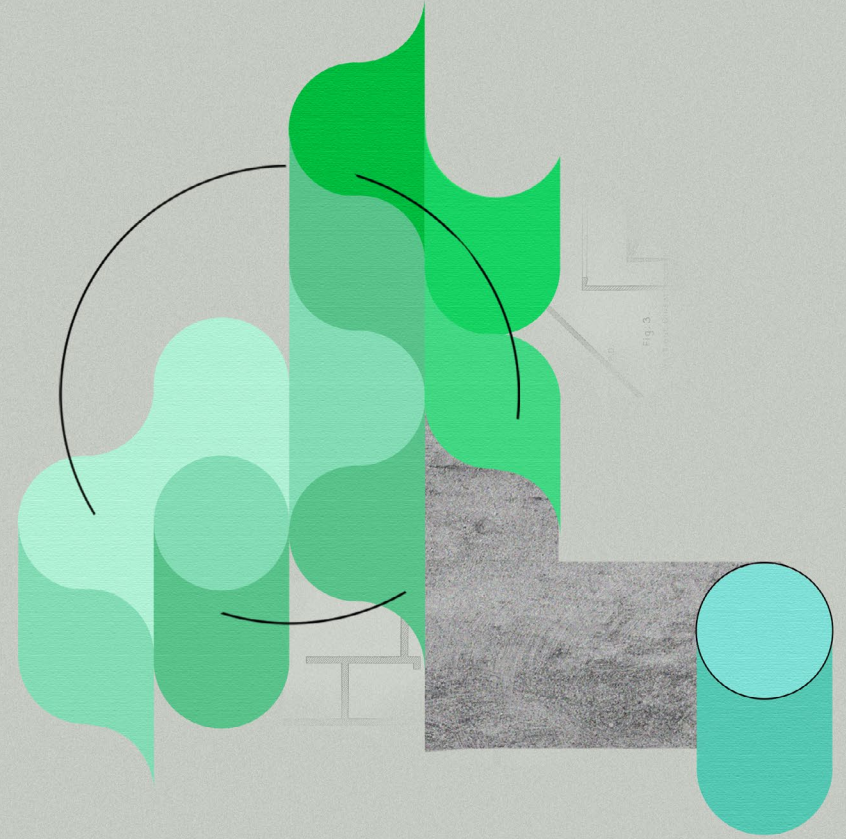
Perception is a challenge—many respondents don't see enough benefit from digital services

Concerns about security and privacy are not necessarily driven by mistrust of how government will use data

Respondents trust government agencies to protect their data more than telecom and tech companies, with which they share huge volumes of data everyday

I trust that "[…]" will protect my personal data.

Private sector

Category	Value
Private health care providers	67%
Financial institutions	66%
Telecom and internet service providers	41%
Technology companies	34%

Public sector

Category	Value
Tax and revenue departments	62%
Public health care departments	55%
Law enforcement agencies	50%
Social welfare agencies	49%
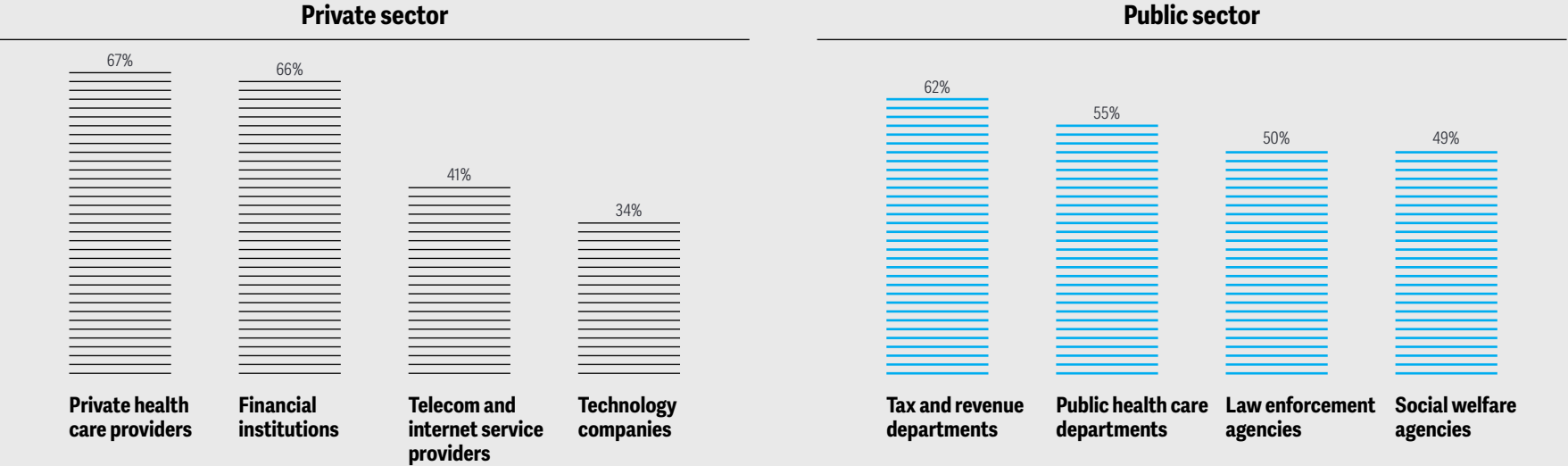
Source: 2023 Deloitte Digital Citizen Survey.

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. Seventy percent of respondents who citied privacy as a challenge are willing to share data if they know how data-sharing improves the services they use. Similarly, 66% of respondents 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 …

- ● Strongly agree
- ● Agree
- ○ Don't know
- ● Disagree
- ● Strongly disagree

	Strongly agree	Agree	Don't know	Disagree	Strongly disagree
Track diseases and predict the prevalence of endemics and pandemics	27%	44%	6%	15%	8%
Provide integrated and personalized social care services	27%	43%	12%	14%	5%
Prevent crimes in my neighborhood	28%	38%	8%	18%	8%
Design new services that are personalized	23%	42%	12%	16%	6%
Offer access to transportation options	23%	40%	12%	19%	6%
Recommend jobs matching my profile	20%	40%	14%	17%	9%

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

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

65%

73%
Respondents who are hassled by providing repetitive information to government agencies are more likely to be open to adopting a digital identity

15%

48%
People who don't feel hassled are open to the idea of digital identity

20%

Source: 2023 Deloitte Digital Citizen Survey.

Improving customer experience is key to building trust
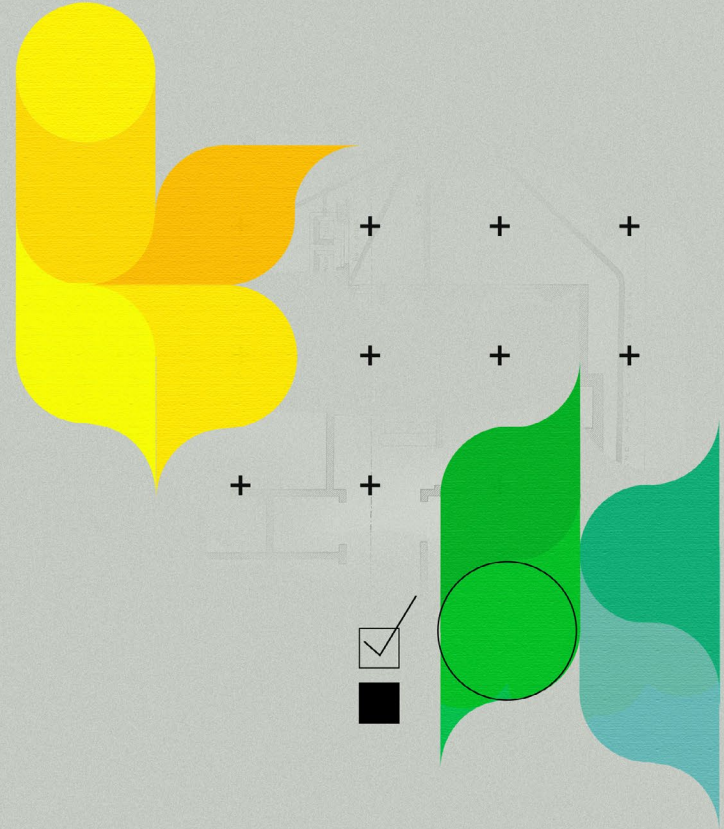
Moving toward an integrated life-events approach is an important way to improve customer experience

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

New business
- Incorporation
- Paying taxes
- Permitting
- Loans and grants
- Labor laws

Marriage
- Marriage registration
- Changing name
- Applying for new government ID card
- Notification of name change

Unemployment
- Unemployment benefits
- Skill development
- Job search
- Upskilling allowances
- Apprenticeship programs

Death
- Death certificate
- Notifying authorities
- Family pension
- Mental health care support
- Executing estate

Life-event services

Child birth
- Birth records
- Child allowance (tax credits)
- Maternity benefits
- Postnatal care
- Early education

Retirement
- Financial planning
- State pension
- Health care and elder care
- Rebates and discounts

Natural disaster
- Medical care
- Housing assistance
- Business recovery grants
- Insurance
- Transportation

Workplace injury
- Workers' compensation
- Mental health services

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, agencies can collaborate to meet constituents' needs proactively.

Willingness to share data for life event–based government services

Please select the three you would be most willing to do

Life event	Percentage
Birth of a baby	~38%
Unemployment	~37%
Experienced a disaster	~36%
Death of a loved one	~34%
Marriage	~28%
Retirement	~26%
Started higher education	~16%
Workplace injury	~15%
Start of a new business	~15%
I am not willing to share data	~13%
Expand an existing business	~11%
Other	~1%
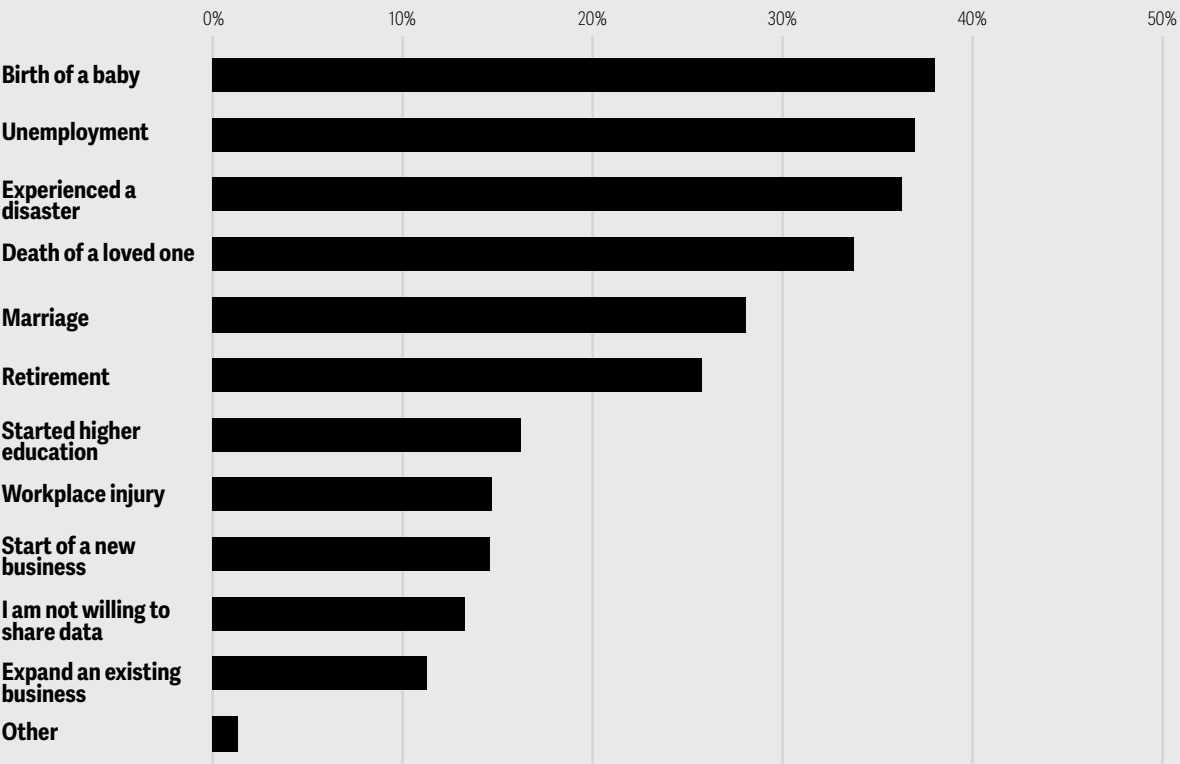
Source: 2023 Deloitte Digital Citizen Survey.

In the United States, as in other countries, respondents' trust in government to protect their data is correlated to their satisfaction with digital government services

Association between trust and satisfaction with digital government services

Trust in government to protect their data (agree/strongly agree)

Overall satisfaction with digital government services (agree/strongly agree)
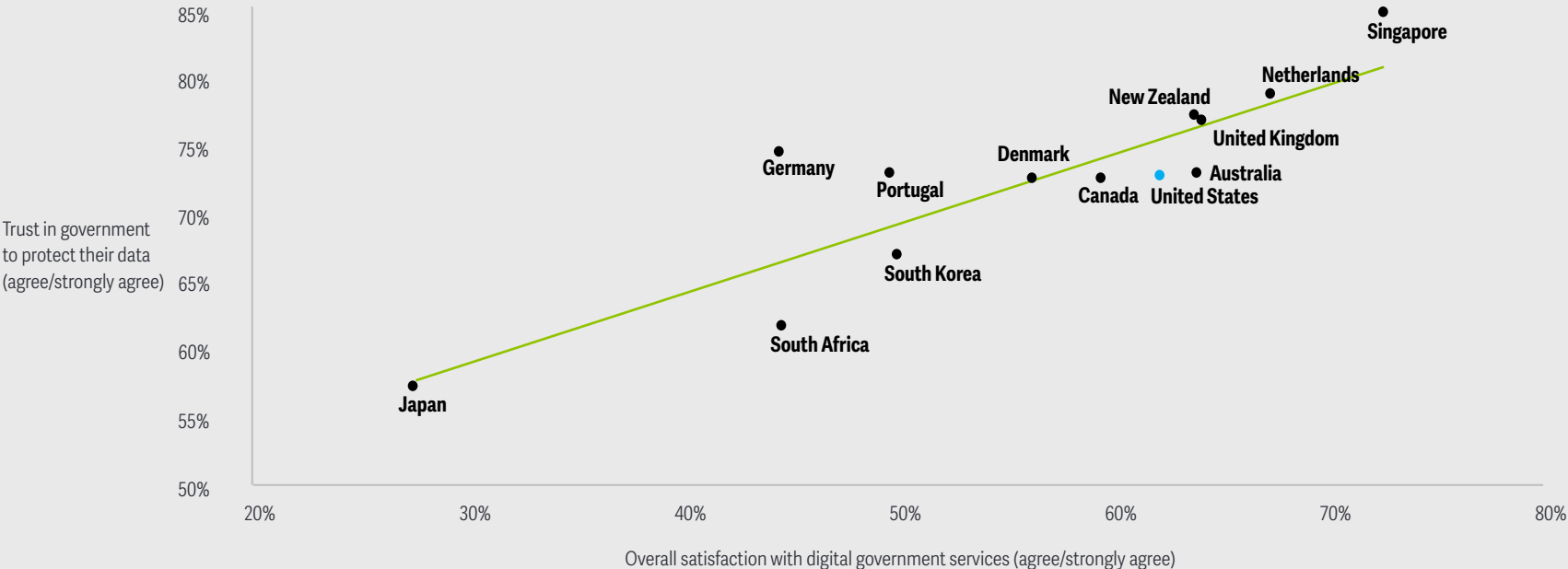
Note: The US results are in line with Deloitte's 2021 US state and local survey that found respondents rate state and local agencies high on trust if they think that state governments' digital services are easy to use.

Source: 2023 Deloitte Digital citizen Survey.

Better customer experience (CX) can lead to higher satisfaction and, thereby, 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

48% — 82%
11%
61%
28%
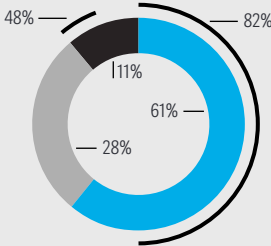
Online family and children services

51% — 87%
16%
54%
30%

Health services

60% — 82%
9%
24%
67%

Filing taxes

63% — 85%
9%
17%
73%
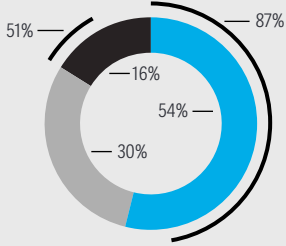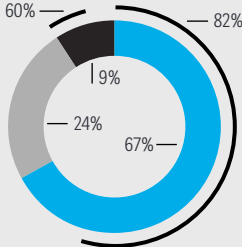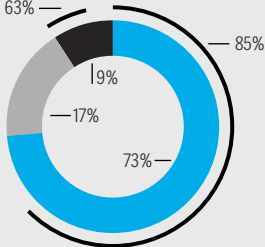
Source: 2023 Deloitte Digital Citizen Survey.

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, tying CX to a mission outcome, assign ownership of improving CX, and building 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**.
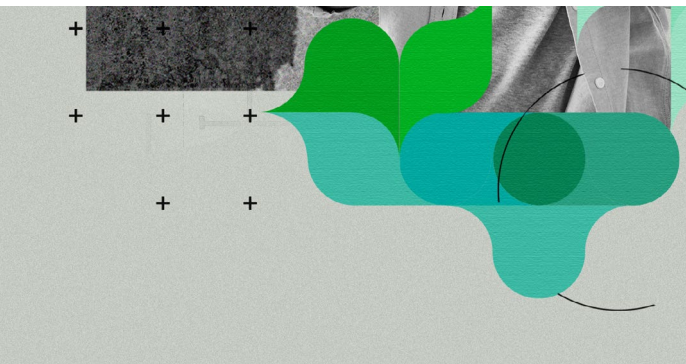
Recommendations

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 survey: United States Sample

In November 2022, Deloitte surveyed 1,000 individuals to understand their use of government digital services in the United States. We also surveyed an additional 857 respondents to be able to conduct statistically valid analysis based on ethnicity and race. The survey results are weighted for age, income, and gender.

Key demographic distribution of US survey respondents

Age
- 28% 18 to 34 years
- 35% 35 to 54 years
- 37% 55 and above

Income
- 32% Low
- 43% Medium
- 25% High

Gender
- 52% Female
- 49% Male

Rural/urban
- 28% A large city
- 42% A suburban area near a large city
- 17% Small city or a town
- 13% Rural area

Race
- White or Caucasian
- Black or African American
- Asian
- American Indian or Alaskan Native
- Multiple races
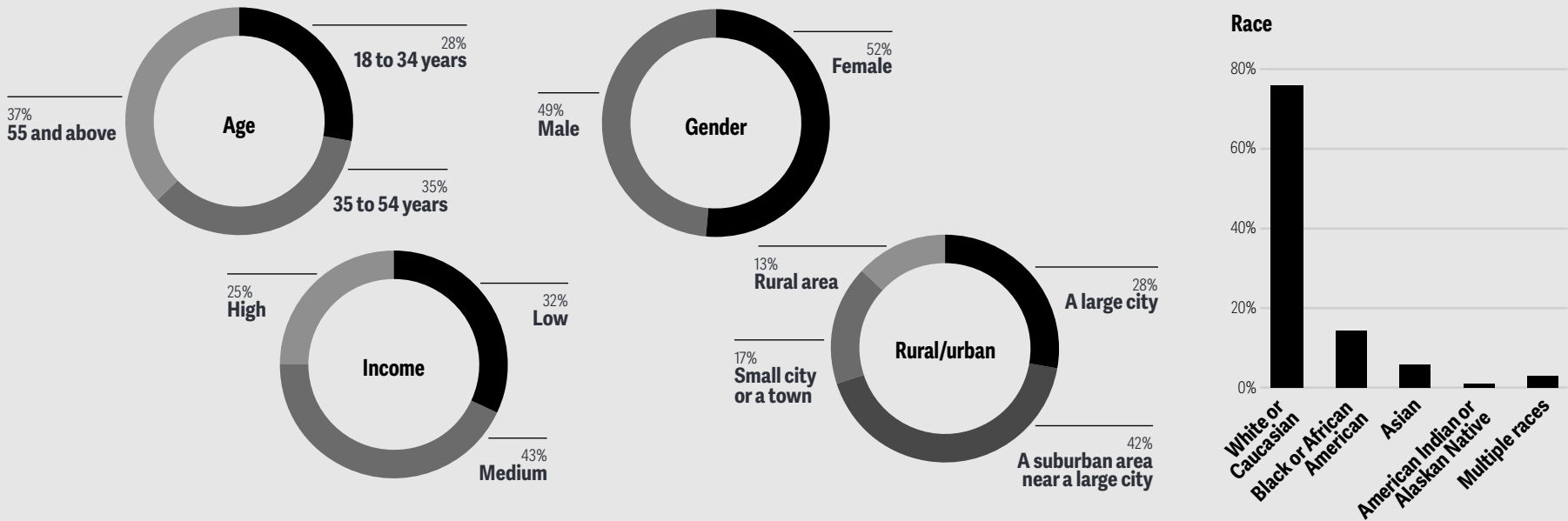
Source: 2023 Deloitte Digital Citizen Survey.

About the authors

William D. Eggers | weggers@deloitte.com

William D. Eggers is the executive director of Deloitte's Center for Government Insights, where he is responsible for Deloitte's public sector thought leadership. His most recent book is *Delivering on Digital: The Innovators and Technologies that Are Transforming Government* (Deloitte University Press, 2016). His other books include *The Solution Revolution, If We Can Put a Man on the Moon,* and *Governing by Network*. He coined the term Government 2.0 in a book by the same name. His commentary has appeared in dozens of major media outlets.

Michele Causey | michelecausey@deloitte.com

Michèle Causey is the leader of Digital Government Transformation for Deloitte's US-based Government Public Services sector, driving service delivery across government that elevates the human experience with intuitive and equitable solutions. As a former member of the US Federal Senior Executive Service, she has a deep awareness of the challenges and opportunities facing decision-makers across government. She brings strategy, customer experience, technology, and innovation skill sets built over her 20+ year career leading digital transformation initiatives in the public and private sectors.

David Noone | dnoone@deloitte.com

David Noone is a senior manager in the Research and Insights group of Deloitte Services LP. He works with governments and universities to better understand and implement emerging technologies and business models that can help address their most pressing challenges. Prior to this role, he spent nine years with Deloitte Consulting LLP leading organizational assessment and transformation projects.

Pankaj Kishnani | pkamleshkumarkish@deloitte.com

Pankaj Kishnani is a research specialist with the Deloitte Center for Government Insights. He specializes in emerging trends in technology and innovation and their impact on the public sector.

Mahesh Kelkar | mkelkar@deloitte.com

Mahesh Kelkar is the smart cities research leader for the Deloitte Center for Government Insights. His research focuses on understanding the impact of technology, innovation, and policy on the future of cities. He closely tracks the federal and state government sectors and focuses on conducting indepth research on the intersection of technology with government operations, policy, and decision-making.

Acknowledgements

About the Deloitte Center for Government Insights

The Deloitte Center for Government Insights shares inspiring stories of government innovation, looking at what's behind the adoption of new technologies and management practices. We produce cutting-edge research that guides public officials without burying them in jargon and minutiae, crystalizing essential insights in an easy-to-absorb format. Through research, forums, and immersive workshops, our goal is to provide public officials, policy professionals, and members of the media with fresh insights that advance an understanding of what is possible in government transformation.

Contact us

Our insights can help you take advantage of change. If you're looking for fresh ideas to address your challenges, we should talk.

Industry leadership

Michele Causey

Digital Government Transformation leader | Deloitte Consulting LLP

+1 571 858 6120 | michelecausey@deloitte.com

Michèle Causey is the leader of Digital Government Transformation for Deloitte's US-based government public services sector.

The Deloitte Center for Government Insights

William Eggers

Executive director | Deloitte Center for Government Insights

+1 571 882 6585 | weggers@deloitte.com

William D. Eggers is the executive director of Deloitte's Center for Government Insights, where he is responsible for the firm's public sector thought leadership.

Digital Government Transformation Services

Digital transformation in government is quickly becoming an imperative: Customer expectations for digital and mobile experiences are pushing governments to embrace digital transformation as fully as their constituents and commercial enterprises have. Deloitte digital government services can help leaders create a government digital transformation strategy that improves many aspects of public service, including the government customer experience. To learn more, visit **Deloitte.com**.

Deloitte. Insights

Deloitte Insights contributors

Editorial: Ramani Moses, Abrar Khan, Aparna Prusty, Arpan Kumar Saha, Rupesh Bhat, Blythe Hurley, and Emma Downey

Creative: Molly Piersol, Sofia Sergei, and Sonya Vasilieff

Deployment: Maria Martin Cirujano

Cover artwork: Sofia Sergi