



# Taking the next step, together

Building upon citizens' renewed trust and increased digital adoption

PwC Australia's Citizen Survey 2020



# Executive summary

*At PwC Australia, we want to start by recognising the incredible efforts of government leaders, public servants and our frontline workers across Australia in leading the response to COVID-19 and now shifting towards economic recovery and longer-term reform.*

- During the bushfires and pandemic, more Australians relied on governments to protect core human needs such as safety and security. New PwC research indicates that this has altered the nature of the relationship between governments and citizens.
- Our citizen surveys in June 2020 and October 2020 suggest that Australians' overall trust in government has significantly increased since 2018, however trust fell for some cohorts including younger people and culturally and linguistically diverse (CALD) citizens during the COVID-19 period.
- Meanwhile, our research also highlighted the shifting nature of demand for digital, with more than a third of respondents saying their use of digital channels for accessing government services has increased during the pandemic.
- Our citizen surveys have also reinforced perceptions around how the pandemic is adversely impacting Australians' mental health. Stress levels were already high in June, and have risen since.

These developments provide a foundation from which to build more responsive services for citizens. To achieve more responsive services, government can:



**Communicate and influence:** Ensure communication with citizens is timely, informed, relevant and consistent whilst being empathetic to their immediate context and needs.



**Listen and take decisive action:** Capture and respond to feedback from citizens in real time to adapt and act quickly to meet their needs.



**Reimagine services and products:** Change how governments design, create and deliver services to become a trusted partner who is able to meet citizens' expectations and evolving needs, enabled by digital.



**Scale and deliver:** Leverage insights from across agencies, states and the nation to quickly scale and optimise solutions – and embed systems and processes – to empower citizen-centric experiences.



**Lead and enable empowered culture:** Have a clear citizen-focused vision and invest in a strong, supportive culture. Have the patience and perseverance to embed change across traditional organisations and to break down silos to foster new ways of working.



## About our research

This report draws upon the findings of our citizen 'pulse check' surveys, which are designed to help inform government service delivery requirements. PwC's Centre for Citizen Research surveyed a large, representative sample of Australians to gauge attitudes, trust in government, and experiences of government services. We conducted the survey in 2018 and then twice more in 2020 (in June and October), providing a barometer for citizen sentiment before and during the COVID-19 pandemic. Some of the key survey findings are summarised in this report.



# At a glance...

Surveyed a nationally representative sample of

# 3,800+



Australian respondents

over the age of 18 across two pulse checks in June and October 2020

## Impacts of COVID-19 and outlook

# 35%

of Australians' mental wellbeing negatively impacted by the lack of in-person interactions during COVID-19

18-24 year olds

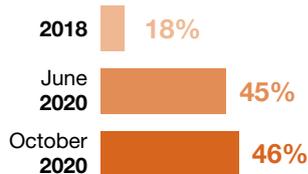
# 2x

more likely to have been stood down or lost jobs, with half feeling optimistic about their future



## Citizen trust

High trust has risen significantly in the past few years



However, trust among some cohorts has declined:

18-24 year olds:

# ↓14%

from June to October 2020

Culturally and linguistically diverse (CALD) citizens:

# ↓9%

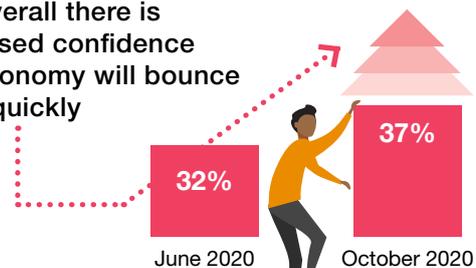
from June to October 2020



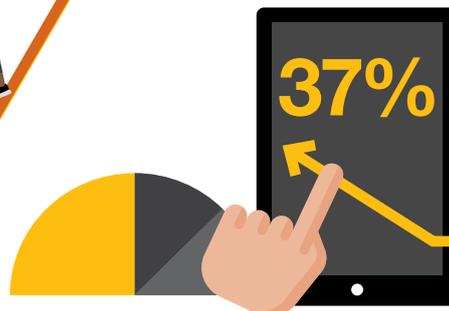
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stressed about financial stability and job security

But overall there is increased confidence the economy will bounce back quickly



## Experiences of government services



of respondents say their use of digital channels has increased during the COVID-19 pandemic

However, comfort levels with sharing data remain low:



# 1 in 3

are comfortable sharing their data online than attending government services in person

Only

# 38%

willing to trade their personal data for easier access to government services

# Helping Australians pass the stress test



When the pandemic first struck Australia, government workforces mobilised at speed and scale to expand services and provide additional support for citizens. This included relaxing identity set-up requirements in the short term so that citizens could get quicker access to essential JobKeeper payments. Overall, citizens in our survey consistently recognised this, with almost one third saying government institutions are exceeding expectations (30% in June, 28% in October). Our October survey was completed just after the Federal Budget was handed down. Compared with June, people in most states were more optimistic about the prospects for a speedy economic recovery (see breakout box 1).

At the same time, the pandemic is increasingly taking its toll on Australians' mental health. Stress levels were already high in June, and have risen since:

- In June, **29% of those surveyed were feeling negatively impacted by a lack of in-person interactions**. By October, that figure had climbed to 35%.

- **Feelings of disconnectedness rose from 38% in June to 44% in October.**
- **Stress related to job security climbed from 32% in June to 37% in October.**

Like the broader population, public sector employees managing the COVID-19 outbreak in Australia have also endured more stress in 2020. The challenge for government leaders now is to sustain high service levels for increasingly stressed citizens – without resulting in workforce burnout.

A good place to start is to reflect openly and honestly on what has and hasn't worked in the past months, and then focus efforts on what matters most for citizens and how to embed and sustain this into the future. From that basis, the government can then set about delivering services in smarter and more efficient ways. Transparency between different agencies can help fast track this process. Many departments face the same difficulties in trying to meet citizens' needs, so leveraging one another's solutions can accelerate service improvements at scale and at lower cost.

Modernising services requires a clear understanding of citizen needs, and data-driven decision making can provide this. Importantly, this also requires considerations around building empathy and compassion into the digital experience through sophisticated use of data and analytics to tailor the experience. By listening to end users, the government can develop products and experiences that respond to citizens' needs in real time. And the more seamless that services become, the easier it is for citizens to interact with the government - driving greater efficiencies for government so they can focus on growth agendas such as job generation.

Of course, it takes time to embed new ways of working and to break down silos. But the pandemic has opened a window of opportunity for leaders to challenge existing processes and behaviour, and to define the future skills required for the workforce. Now is the time for leaders to modernise services, and back this up with proactive strategies for inclusivity, employee wellbeing, and mental health.

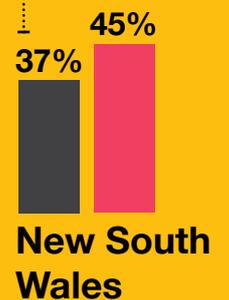
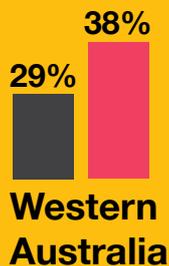
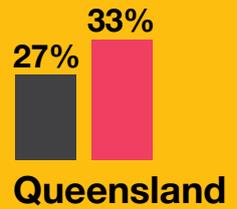
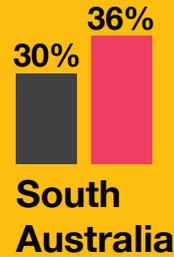


Breakout box  
**01**



**Despite increased stress, economic confidence is rising**

Our October survey was completed just after the Federal Budget was handed down. Compared with June, people in most states were more optimistic about the prospects for a speedy economic recovery:



**Legend:**

- June
- October

# Trust: New foundations to build upon



In our 2018 survey, just 18% of Australian citizens said they had ‘high trust’ in government but, amidst the COVID-19 crisis, something remarkable happened. Citizens’ high trust in government soared to 45% by June 2020 and remained at these high levels in October 2020 (46%). Furthermore, high trust’ in the federal government rose from 39% during the bushfires in late 2019/early 2020 to 54% during the pandemic.

Trust is the cornerstone of any healthy society. It’s what makes citizens believe they can depend upon the government. And from that base, citizens are more likely to share, participate and collaborate with the government and wider society when it feels like a partnership. So the big question for government leaders now is: Having acquired these newfound levels of trust among citizens, how can that be sustained?

A big part of the answer lies in knowing what governments have done this year to drive trust higher, and then converting that into business as usual. For example, throughout the pandemic, governments have been transparent with frequent communication around restriction changes; rolled out contact tracing through QR codes; eased regulation and partnered with industry to fast track access to rebates.

In [previous research](#), we found that transparency and honesty from the government is one of the biggest drivers of trust. In 2020,

all levels of government have provided regular updates and openly shared data with citizens. Governments have also publicly adopted a ‘try, test and learn’ approach to health strategies that rely on community and business engagement and action.

Our research also suggested that citizens’ experiences of government services are a major driver of trust. In 2020, initiatives such as JobKeeper and JobSeeker allowed millions of Australians to lean on the government to ensure core human needs like safety and security (e.g. income, job security, and health) were met. It’s perhaps no surprise that 50% of survey respondents who identified themselves as ‘not working’ said they had high trust in government by October (up from 35% in June). There is no doubt that the relationship between government and citizens has changed. The key for the governments will be how they can continue to sustain this trusted relationship outside of crisis mode so their service delivery is sustainable.

## Responsiveness

To sustain trust in the long term, it will be vital for government agencies to continue listening and responding to citizens. That requires policy and communication strategies supported by tools and frameworks that use data and analytics to better understand citizens’ needs and deliver connected and personalised experiences based on their

holistic needs. This is the moment to begin (or continue) that journey, with 37% of survey respondents saying their use of digital channels to interact with government services has increased during the pandemic.

Data and analytics can enable rapid policy development, which could be invaluable in future for a variety of scenarios – from crisis responses to policy failures or direction changes. In these instances, it will be essential to use data to operationalise a policy commitment or validate whether existing policies are on track to achieve their aims. Data and analytics can also be used to customise citizen’s experiences by better detecting their needs and predicting unmet needs, to target and tailor services early to those that need support the most.

It’s also vital that the government continues to build citizen awareness of what agencies are doing and translate this into what that means for them – just as a private corporation communicates to investors. As we have seen in 2020, trust grows when the government provides progress reports to ensure expectations are aligned with reality; including being honest about what is (and isn’t) working, and what is going to change.

\* Respondents were asked, “Using the 100-point scale, where 0 means ‘strong distrust’, 50 means ‘neutral’ and 100 means ‘high level of trust,’ to what extent do you currently trust Australian government institutions?”. ‘High trust’ refers to a rating of 71-100 out of 100.

# Steps to consolidate Australians' trust in government

Governments can retain and grow citizen trust by enhancing citizens' experiences of services, including:



**Effortless access** – By understanding how citizens want to engage, governments can enable access via a customer's preferred channel at their preferred time and personalise their experience (e.g. tailor digital experiences through easy-to-access online portals based on connected services to support a life event; virtual servicing to conveniently interact with an important service; after hours services based on business needs).



**Connected services** – By sharing information between agencies, citizens can seamlessly access multiple services in response to a particular circumstance or life event. Public and private sector organisations should work together to solve customer pain points by improving the entire end-to-end experience, not just the component parts.



**Responsiveness** – Trust cues should be designed and hardwired into the customer experience (e.g. accelerated pathways for urgent cases or 24-hour return call policies). Keeping customers updated is critical and employees should be empowered to improve the complete customer journey, rather than resolve issues individually.

Governments can further retain and grow citizen trust by fostering values including:



**Behaviours** – By working in genuine partnership with citizens and industry, governments can co-design and collaborate with them to develop policy and services (and seek feedback to continuously improve).



**Mindsets** – Putting citizens at the heart of business cases helps focus attention on how every dollar spent will deliver value to taxpayers and tangibly improve the lives of citizens.

Breakout box

02

# Harnessing digital adoption: overcoming digital doubts



Our 2020 surveys indicate that government investment in digital service delivery is validated, with more than a third (37%) of respondents saying their use of digital channels has increased during the pandemic.

Now that so many Australians have tried accessing government services virtually, there is a big opportunity for governments to turn this into a habit. Data can become the backbone of government responses to citizen needs, with agencies transforming their services and generating continuous improvement models to become more effective and efficient – targeting the right services to the right person at the right time.

To achieve this service transformation, a whole-of-government approach is required so that customer-centric cultures and practices permeate not only front of house and contact centres, but humanised digital-led experiences too (see breakout box 3). This opens up the possibility of an ecosystem of personalised digital products and services, providing micro-moments of delivery across all touchpoints, contextualised to an individual's whole needs and circumstances.

## Ethics-by-design philosophy

While Australians appreciate (and expect) the speed and capability that data-driven technologies offer, they remain cautious and protective of their personal data. And the full potential of digital can only be realised when citizens feel sufficiently reassured to share their data with the government.

While governments have been, and are, investing heavily in cybersecurity, doubts among the Australian population remain. For example, 57% of respondents say their personal privacy is of paramount importance and they aren't willing to compromise it under any circumstances. This is reflected in the lower uptake of the COVIDSafe app, where only one quarter of Australians have downloaded it.

The ethical use of citizens' data must, therefore, be a strong pillar of any service delivery model. Governments need to demonstrate that they place human concerns and moral standards front and centre in their services, by using a framework that sets out the principles and foundations to

ethically design, secure and protect the personal data they hold. This framework can ensure citizens understand – and see – how their information is used, secured and protected.





Breakout box  
**03**



## Digital helps prevent people falling through the cracks

While trust in government increased among many Australians in 2020, our citizen survey identified groups bucking that trend.

A declining number of culturally and linguistically diverse (CALD) citizens said they had high trust in government (54% in June; down to 45% in October) and fewer still said government institutions were exceeding expectations (39% in June; down to 25% in October).

A relatively small number of young Australians (aged 18-24) said they had high trust in government in June (36%) and this fell to 22% by October. Meanwhile, only 26% felt government institutions were exceeding expectations in June, and that dropped to 12% by October.

CALD respondents and young respondents were also more likely to feel stressed about job security and less likely to be confident of dealing with uncertainty caused by recent events.

As the wealth divide is exacerbated by the pandemic, it will be more important than ever for the government to address such trust deficits. Humanising the digital experience can play a significant part in this. Advanced analytics, combined with user-focused design, can offer citizens something they feel technology often lacks – the human touch.

Human-centred digital programs, in which social inclusion is consciously designed into the experience, can elevate the unique and varied needs of individuals while collectively expanding the digital capability of all customers, including those experiencing vulnerability. For some groups and individuals, a gradual transition may be required, with a human-focused approach to the introduction of the digital programs.





# Get in touch

To have a discussion about the insights and how they can help your organisation please contact us.

## Contacts

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